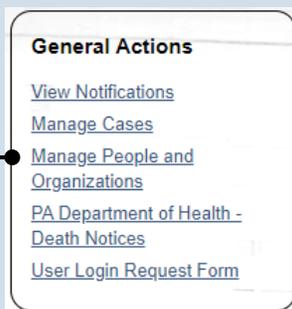




# How to Add Training and Certification for a Guardian

## 1. Initiate a search

In the General Actions section of your Dashboard, click the *Manage People and Organizations* link.



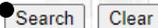
## 2. Enter the search criteria for the person

On the Participant Search screen, click on the **Search By** dropdown and select 'Person'. Enter the guardian's **Last Name** and **First Name**.



## 3. Click SEARCH

**Tip** If the person is not found, repeat Step 2 using different information for the search.



**Tip** Partial names, with a minimum of two characters, can be used.

**Tip** If you want to limit your search to existing guardians or Pennsylvania bar attorneys, select the **Guardians Only** and/or **Attorneys Only** checkbox.

| Name            | Type     | Address   | Identifiers                 | Per Info |
|-----------------|----------|---|-----------------------------|----------|
| Donna M. Hunter | Guardian | 141 Courtney Dr<br>Verona, PA<br>15147<br>(Other) | Guardian Number:<br>1200301 |          |



## 4. Choose the guardian

Based on the search results, click the Edit Record icon that appears to the right of the appropriate guardian.

# How to Add Training and Certification for a Guardian



5. In the Edit Person/Organization screen, click on the Guardian Details tab

A vertical menu with the following items: Names, Addresses, Phone, Email, Attributes, Guardian Details (highlighted with a black dot), Attorney Details, Alerts, and Audit Information.

7. Insert a new certification row  
Click the Add Certification Record icon above the Certifications grid.

The Certifications grid has a header with columns: Certification Type / Provider Name, Effective Date, and Expiration Date. Below the header is a row with a dropdown menu, two date pickers (mm/dd/yyyy), and a plus icon (+) in a blue circle.

6. Are you adding a certification?

To add a certification for a guardian, continue to Step 7. Otherwise, proceed to Step 10.

9. Click the Save icon  
The certification is saved to the guardian's person record.

The Certifications grid now has one row: Family/Lay Guardian Training: Fundamentals of G, 11/01/2022, 10/31/2024. The Save icon (a document with a checkmark) is highlighted with a black dot.

8. Record the certification details

Select the **Certification Type/Provider Name** from the dropdown and enter the **Effective Date** and **Expiration Date** of that certification.

11. Insert a new training row  
Click the Add Training Record icon above the Trainings grid.

The Trainings grid has a header with columns: Course Name, Provider Name, Start Date, and End Date. Below the header is a row with the text "No results found" and a plus icon (+) in a blue circle.

10. Are you adding training?

To add trainings for a guardian, continue to Step 11. Otherwise, this process is complete.

# How to Add Training and Certification for a Guardian



**12. Enter the name of the training in the Course Name field**

A screenshot of a web application interface showing a table titled 'Trainings'. The table has four columns: 'Course Name', 'Provider Name', 'Start Date', and 'End Date'. The first row contains the following data: 'Caring for Someone with Alz', 'National Guardianship As', '09/30/2022', and '09/30/2022'. To the right of the table are two icons: a save icon and a delete icon. A plus sign icon is in the top right corner of the table header. Three lines with dots at the end point to specific fields: one points to the 'Course Name' field, one points to the 'Provider Name' field, and one points to the 'Start Date' field.

| Course Name                 | Provider Name            | Start Date | End Date   |
|-----------------------------|--------------------------|------------|------------|
| Caring for Someone with Alz | National Guardianship As | 09/30/2022 | 09/30/2022 |

**14. Enter the training dates**

Enter the **Start Date** of the training. Entering the **End Date** is optional.

**13. Enter the provider**

Enter the name of the individual, organization, or institution that offered the training in the **Provider Name** field.

**15. Click the Save icon**

The training is saved to the guardian's person record.

**16. Enter additional training**

Repeat Steps 11 – 15 for additional trainings.