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This manual contains system instructions and answers to most of your questions.
Save it to your desktop for easy access in the future. No printing necessary!

Click on a topic above.



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Still need help? **CONTACT US**

[Click Here](#)
Submit Your Request

Support Team Hours:

Monday through Friday (Excluding Holidays)

8:00 a.m. through 4:00 p.m. EST

Email us anytime: OnlineTraining@HousingCenter.com



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DISCOUNTS

What discounts do I get as a subscriber?

HAI Group Online Training subscribers receive discounts on industry-recognized certifications and access to an exclusive library of over 120 courses, group viewing opportunities, and our concierge support service. Refer to the chart below and submit a [support request](#) form and request more information.

Option	Number of Users	Annual Subscription Price
1	5-24	\$2,500
2	25-99	\$3,500
3	100+	\$5,500

How can I save on bulk purchases?

Bulk discounts are available for purchases of 10 or more courses. **Refer to the chart below** for the discount code needed for your group of learners.

Can I combine subscriber and bulk discounts?

Yes. Your subscriber discount is automatic. **To add a bulk discount, refer to the chart below** for the discount code needed for your group of learners.

Number of Courses	Discount	Discount Code
10-19	10%	BP10
20-49	15%	BP15
50+	20%	BP20



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SUBSCRIBER

What are the benefits of being a subscriber?

For a flat annual fee, subscribers enjoy:

- Unlimited course access to most courses in the subscriber catalog at no additional charge
- Discounts on industry certifications
- Solo or group viewing options to suit your organization's preferred learning participation style
- Personalized support and assistance in facilitating training at your organization.

How can I tell if my organization is a subscriber?

1. Log into your personal Online Training account at www.htvn.org.
2. From the **main menu bar**, place your cursor over your **initials** in the upper right-hand corner of the screen and select **Account**.
3. Under **Domains and Roles**, your subscription status will be displayed.

How much does it cost to become a subscriber?

Pricing is determined by the number of user profiles purchased for your organization. A user profile is required for each unique learner. Refer to the chart below and submit a [subscription request form](#) for additional information.

Option	Number of Users	Annual Price
1	5-24	\$2,500
2	25-99	\$3,500
3	100+	\$5,500

How do I become a subscriber?

Submit a [support request](#), form and one of our customer success specialists will contact you to activate your subscription and provide the next steps.



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POLICYHOLDER

What are the benefits of being a policyholder?

If your organization has a current insurance policy with **HAI Group**, your entire organization automatically has policyholder status on **HAI Group Online Training**. As a policyholder on **HAI Group Online Training**, everyone in your organization has free access to most risk-related courses in our catalog. Submit a [support request](#) form, and a customer success specialist will contact you to get you set up and answer any questions you may have.

NON-SUBSCRIBER

Are courses available to non-subscribers or non-policyholders?

Yes! All of our non-exclusive content is available for purchase.



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MAKING A PURCHASE

What are my payment options?

We accept **credit cards** and **check**. Debit cards are **not** accepted.

How do I purchase a course(s) with a credit card?

1. Log in to your personal Online Training user account at www.htvn.org.
2. Enter all or part of the desired course title into the **Catalog Search** box in the navigation bar.
3. Click on the **Search** button.
4. Scroll through the search results to find the desired course.
5. Click on the **Course Title** you wish to purchase to view its details.
6. Click on the **Add To Cart** button.
7. Click the **Shopping Cart** icon in the menu bar.
8. Verify the course title and price.
9. Enter the desired **Quantity**, then click the **Update** button.
10. If you have a discount code, enter it in the **Discount Code** box, then click the **Apply** button.
11. Click on the **Checkout** button.
12. Click on the **Use this payment method** button.
13. Complete all data on the subsequent two screens. Verify if you are using the proper billing address for the credit card you are using.
14. Click on the **Submit** button. The payment confirmation screen will display.
15. See instructions below on [How do I enroll myself after a course purchase?](#) or [How do I enroll others after a course purchase?](#)



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MAKING A PURCHASE

How can I purchase a course(s) with a check?

1. Log in to your personal Online Training user account at www.htvn.org.
2. Enter all or part of the desired course title into the **Catalog Search** box in the navigation bar.
3. Click on the **Search** button.
4. Scroll through the search results to find the desired course.
5. Click on the **Course Title** you wish to purchase to view its details.
6. Scroll down to **Pricing and Payment Options**.
7. Click on the **Pay by Check** link. Or [click here](#) to request an invoice now.
8. Complete all required fields on the form.
9. Click on the **Submit** button. An invoice will be emailed to you. Once payment is received, each learner will be notified by email and will have instant access to the course.

How do I apply my bulk discount code?

1. Once you have placed the desired course into your shopping cart, enter the appropriate discount code into the **Discount Code** box.
2. Click on the **Apply** button. The discount will be deducted from the purchase total.
3. Click on the **Checkout** button to complete your purchase.



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MAKING A PURCHASE

How do I enroll MYSELF after a course purchase?

1. From the Purchase Receipt page, click on the **Manage Access Keys** button and **proceed to Step 2**.
OR Place your cursor over your **initials** in the main **menu bar** and select **Orders**.
Click on the **View Details** button for the course you wish to enroll yourself in.
2. Click on the **Assign** button. (Do not use the button's drop-down feature.)
3. Click in the **User** box and enter **YOUR email address**.
4. Click outside the **User** box
5. Click on the **Assign** button. The course will be added to your training home page.

How do I enroll OTHERS after a course purchase?

1. From the Purchase Receipt page, click on the **Manage Access Keys** button and proceed to **Step 2**.
OR Place your cursor over your **initials** in the main **menu bar** and select **Orders**.
Click on the **View Details** button for the course you wish to enroll others in.
2. Click on the **Assign** button. (Do not use the button's drop-down feature.)
3. Click in the **User** box and enter **the LEARNERS email address**.
4. Click outside the **User** box
5. Click on the **Assign** button. The course will be added to the learner's training home page.

How do I get a receipt for my purchase?

You can obtain a receipt for any purchase at any time. Follow the instructions below.

1. Place your cursor over **your initials** located on the right side of the main menu bar.
2. Click on **Orders**.
3. Click on the **View Details** button for the desired purchase. The order will display.
4. Click on the **Show More** button to view payment details.
5. Click on the **Print** button to print your receipt.



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MAKING A PURCHASE

How do I get a receipt for my purchase?

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1. Place your cursor over **your initials** located on the right side of the main menu bar.
2. Click on **Orders**.
3. Click on the **View Details** button for the desired purchase. The order will display.
4. Click on the **Show More** button to view payment details.
5. Click on the **Print** button to print your receipt.

My payment didn't go through. What now?

If your payment is unsuccessful, you will receive an error message stating “**Something Went Wrong**” on your screen. There are a wide variety of reasons why a payment is unsuccessful. You will need to contact the card holding bank to determine the cause. Once the issue has been resolved with the card holding bank, you may attempt your purchase again.



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ABOUT MY CERTIFICATION COURSE

How long do I have to complete my certification course?

Your certification course, and all three of your allotted exam attempts must be completed within **six months** of the date you started the course. The start date appears on your training home page next to the course title.

How do I access my course workbook and master book?

All course documentation, including workbooks and master books, can be accessed from the **Getting Started with Your Course** section of your course's **Content** page. No course materials will be shipped to you.

When will I receive my certification plaque?

According to Nan McKay, your certification plaque will be shipped directly from Nan McKay & Associates' headquarters **8-10 weeks** after you successfully pass your exam. If you have any questions regarding your certification plaque, please contact **Nan McKay** directly by emailing sales@nanmckay.com. Your patience is very much appreciated.

Other Certifications: You can print a certificate of completion by clicking on **Transcript** from the menu bar, and selecting the **Curriculum** tab. Locate the course on the list and click on the **View Certificate** button. If you do not see this button, click on the course's title and complete the **Course Survey**. Upon completion, you will have the option of printing your certificate of completion. No plaques will be mailed to you.



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ABOUT MY EXAM

What do I need to do to prepare for my exam?

1. Identify an individual in your organization who is willing to serve as your proctor.
2. Schedule a date and time for your exam that will work for both you and your proctor.
3. Review all course content including the supplementary material provided in your course's master book and workbook.

Who can proctor my exam?

Any individual in your organization who has not taken the exam in the past six months and does not plan on doing so in the coming six months.

What are the proctoring rules for my exam?

It is the responsibility of the proctor to preserve the integrity of the online certification examination by insuring that the following testing environment is maintained during the testing period:

1. No written or verbal communication between examinees during the testing period.
2. Proctor has verified through a driver's license or other official identification that the person who is taking the test is the person who signed up to take the test.
3. Proctor is to remain in the room at all times during the exam.
4. No individual will have access to any unauthorized seminar materials during the testing period.
5. Under no circumstances will the proctor copy or allow copying of materials or examinations.
6. Proctor cannot have taken the exam in the past six months or plan to take the exam within the next six months.
7. Proctor must be at least 18-years old.
8. Due to special circumstances in regards to COVID-19, family members that meet the criteria of rules 1-7 can also proctor an exam from home.

Any violation or infringement of any of the above criteria will result in invalid exam results for the test taker.



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ABOUT MY EXAM

How can I minimize potential technical issues during my exam?

1. Use a desktop or laptop computer. **Do not attempt** to take your exam on a mobile device.
2. Use a secure LAN line connection if possible. If you must use a Wi-Fi connection, make sure it is secure and you have a strong signal.

How do I start my exam?

1. Make sure your proctor is present.
2. Open your course from your training home page.
3. From the course's **content** page, scroll down to the exam and click on the **Start** or **Review** button. The exam will open in a new window.
4. Complete and submit the preliminary questionnaire. The first set of questions on the exam will open and a timer will appear in the upper right-hand corner of the screen. The timer indicates how much time you have remaining to complete the exam. You are granted a total of three hours.



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ABOUT MY EXAM

What do I do if I lose internet connection during my exam?

1. Don't panic. Close your web browser.
2. Verify you have a reliable internet connection. Do not proceed until you have a stable internet connection.
3. Re-open your web browser.
4. Log in to your HAI Group Online Training account at www.htvn.org.
5. Open the course from your training home page.
6. Scroll down to the exam on the course's content page.
7. Click on the exam's **Review** button. The exam will re-open.
8. Complete and submit the preliminary questionnaire (if applicable). The first set of questions on the exam will open and a timer will appear in the upper right-hand corner of the screen indicating how much time you have remaining to complete your exam.
9. Use the page buttons to navigate to where you left off before you were disconnected.
10. Complete all remaining questions and submit.

If you require additional assistance, submit a [support request](#) form, and a customer success specialist will contact you.

What if I fail my exam?

You are granted up to three exam attempts with your certification course. You must wait a minimum of **24 hours** before your next exam attempt. For better results, be sure to do a thorough review of all course materials before each attempt.



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USER PROFILES

How do I create a user profile for myself?

1. Go to www.htvn.org, and click on **Sign Up!**
2. Enter your **email address** as your Login ID.
3. Enter a **password** you will remember and write it down.
4. Enter your **professional email address**.
5. Enter your full name and click on the **Next** button.
6. Enter your complete mailing address and phone number then click on the **Next** button.
7. Enter your Full Company Name – Do NOT use abbreviations or acronyms.
8. Complete **all** remaining fields.
9. Click the **Create** button. **Note:** It will take 1 to 2 business days for your profile to be associated with your organization.
During this time period, most courses will not be available to you.

How do I create a user profile for someone else?

IMPORTANT: You must have **Administrator Access** to perform this function.

1. Place your cursor over **Manage** in the navigation bar.
2. Select **People**.
3. Click on the **Create Account** button.
4. Enter the user's full email address as their Login ID and complete all subsequent fields.
5. Click the **Next** button to navigate through the information pages.
6. In the Confirm Full Company Name field, type in your organization's full name (No abbreviations or acronyms).
7. Click in the **Organizations** box.
8. Enter some or all of your organization's name into the **search** box.
9. A list of organizations matching your search displays. Select **your organization** from the list.
10. Click on the **Create** button at the bottom of the page. The new user will receive their login ID and password in an automated email.



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USER PROFILES

How do I edit my user profile?

1. Place your cursor over your **initials** or avatar in the navigation bar.
2. Click on **Account** from the dropdown box.
3. Click the **Profile** tab.
4. Click on the **Edit User Information** button.
5. Make modifications to all desired fields.
6. Scroll down and click on the **Save** button.

How do I edit another user's profile?

IMPORTANT: You must have **Administrator Access** to perform this function.

1. Place your cursor over **Manage** in the navigation bar.
2. Click on **People**.
3. Enter the **user's name** (first, or last) or **email address** in the Search field.
4. If you wish to include de-activated users in your search, select **See more search criteria** to open advanced search options and de-select **Active** to include all users.
5. Click on the **Search** button. A list of user accounts matching your search criteria displays.
6. Locate the desired name on the list and choose **Edit Profile** from the Action menu.
7. Click on the **Go** button. The selected user's profile window displays.
8. Click on the **Profile** tab.
9. Click on the **Edit User Information** button.
10. Edit the desired fields.
11. Click on the **Save** button.



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USER PROFILES

How do I deactivate/reactivate another user's profile?

IMPORTANT: You must have **Administrator Access** to perform this function.

1. Place your cursor over **Manage** in the navigation bar.
2. Click on **People**.
3. Enter the user's name (first, or last) or email address in the **Search** field.
4. If you wish to include de-activated users in your search, click on the **See more search criteria** link to open advanced search options and de-select **Active** to include all users.
5. Click on the **Search** button. A list of user accounts matching your search criteria displays.
6. From the Search Results page, choose **Edit Activity** from the Action menu.
7. Click on the **Go** button. The selected user's edit activity window displays.
8. Click on the **Inactive** radio button to deactivate the user profile. Click on the **Active** radio button to reactivate the user profile.
9. Click on the **Save** button.



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LOGIN

How do I login/logout?

1. Go to www.htvn.org.
2. Enter your complete **email address** as your login ID.
3. Enter your **password**. (If you do not remember your password, click the **Contact Us** link at the bottom of the screen to request a reset.)
4. Click on the **Login** button to open your Training Home page.

To log out:

1. Place your cursor over your **initials** or avatar in the gray navigation bar.
2. Select **Logout**.

How do I request a password reset?

1. Contact your organization's system administrator OR submit a [Support Request](#) here.

How do I change my password?

1. Place your cursor over your **initials** or avatar in the navigation bar.
2. Select **Account** from the dropdown box.
3. Click on the **Edit Password** link.
4. Enter your **Current Password**.
5. Enter your desired **New Password** – Remember your password is case sensitive.
6. **Re-enter** your desired New Password for confirmation, and write it down for future reference.
7. Click on the **Save** button.



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LOGIN

How do I reset another user's password?

IMPORTANT: You must have **Administrator Access** to perform this function.

1. Place your cursor over **Manage** in the navigation bar.
2. Select **People**.
3. Enter the user's name (first or last) or email address in the **Search** field.
4. If you wish to include de-activated users in your search, click on the **See more search criteria** link to open advanced search options and de-select **Active** to include all users.
5. Click on the **Search** button. A list of user accounts matching your search criteria displays.
6. Locate the desired user from the search results and choose **Login Assistance** from the Action menu.
7. Click on the **Go** button. The Login Assistance window displays.
8. Make note of the user's Login ID and provide it to the user.
9. Click on the **Create Password** button. A light green box will appear at the top of the screen providing a temporary password for the user.
10. Provide the temporary password to the user verbally or paste it into an email.

IMPORTANT: The password is case sensitive and the user will be prompted to change it. If the password contains any characters that appear to be an "L" or an "O" they are actually ones and zeros.

What do I do if my automated password reset does not work?

1. Submit a [Support Request](#) here, and a member of our support team will assist you.



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COURSE ACCESS

How do I access my course(s)?

1. Log in to your Online Training account at www.htvn.org. Your Training Home page will open.
2. From the **Current Training** portlet, locate the course you wish to access and click on its **View** button.
3. If the desired course is not listed, click on the **View All** button. A complete list of all your current courses will display.
4. Locate the course you wish to access and click on its **View** button.

Why can't I access my course?

There are a number of reasons why you may not be able to access a course...

- You are not a subscriber
- The course requires payment
- The course is no longer active

Submit a [Support Request](#) here, and a member of our support team will assist you.

How do I play course content on my mobile device?

Most courses will function the same on a mobile device as they do on your computer. However, be sure to login to your user profile using **Google Chrome** as your web browser. Courses will NOT play on Safari.



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COURSE ACCESS

How does my course work?

Each course may contain any of the following key elements:

- **Video Parts:** These will have a status of “Not Enrolled” until you start them, and they must be taken in the order listed.
- **Quiz/Test/Exams:** These are all multiple choice and require a passing score of 70% to move forward or complete the course.
- **Supplemental course materials:** These include Master books and Work books, all in PDF format.

To access and take a course:

1. Login to your personal online training account at www.htvn.org
2. Locate the course on your **Current Training** portlet. If the course is not visible, click on the **View All** button.
3. Click on the course’s **View** button. The course’s content page will open.
4. Click on the **Content** tab (if not open) to view course sections and parts.
5. Click on **Course Resources** or **Getting Started with Your Course** to access all workbooks and written course materials in PDF format.
 - 5.1. Click on the **Start** button for the desired resource to open it.
 - 5.2. Access the *Print* and *Download* options by placing your cursor toward the top of the window.
 - 5.3. Click on the **Exit** link at the bottom of the window to close the document and return to the course contents.
6. Click on **Coursework** to access all course parts, quizzes, tests, and exams. **Note:** *These will have a status of **Not Enrolled** until they are started.*
 - 6.1. Click on the **Start** button for the first course part to begin – it may open in a new window.
 - 6.2. When the part is completed, click on the **close/exit** button OR press your **F5 key** to return to the course’s contents page.
 - 6.3. Click on the **Start** button for the proceeding course part – it may open in a new window.
 - 6.4. Repeat steps 6.1 through 6.3 to complete all course parts. When all course parts are completed, the course will no longer display in your Current Training portlet and will only be accessible from your **Transcript**.



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COURSE ACCESS

How do I print my certificate of completion?

1. Select **Transcript** from the navigation bar. If you are an administrator, select **Training** from the navigation bar, then select **Transcript**.
2. From your transcript page, click on the **Curriculum** tab. All started and completed courses will be listed alphabetically.
3. Click on the **View Certificate** button.
4. **If the View Certificate button is not available**, and the course is marked completed, you will need to complete the Course Survey.
5. Click on the **desired course title** to access it.
6. Click on the **Take Survey** button.
7. Complete and **submit** the course survey.
8. Click on the **View Certificate** button.

How do I give another individual access to a course(s)?

- **If the course is free**, the course must be assigned. Follow the instructions provided under the **Course Assignment** section below.
- **If the course is purchased**, follow the instructions on how to **Purchase a course and enroll others** below.

What is my transcript, and how do I use it?

Your transcript is a permanent record of all learning content in which you have been enrolled or participated, as well as content assigned to you. If you have attempted a learning item more than once, each attempt displays on your transcript.

To access your transcript:

1. Select **Transcript** from the navigation bar. If you are an administrator, select **Training** from the navigation bar, then select **Transcript**.



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COURSE ENROLLMENT (For Yourself)

How do I find a course using the course catalog?

To Search:

1. Click in the catalog **Search** box in the navigation bar
2. Enter your search terms (enclose multiple words in quotes to refine search results)
3. Select a course from the list or click on the **Search** button.

To Browse:

1. Click on the **Catalog** button in the menu bar.
2. Click on a **Topic** of interest.
3. Click on a desired **Course Title** to view course details.

How do I enroll myself in a free course?

1. After you have found the course in the catalog (see instructions above), click on desired **Course Title** to view course details.
2. Click on the green **Enroll** button located in the blue course title pane. **Note:** If the course requires payment, a green **Add to Cart** button will appear in the right-side panel. See instructions below for purchasing courses.
3. To start the course, click on the **Start** button for the first course part.



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COURSE ENROLLMENT (For Yourself)

How do I purchase a course and enroll MYSELF?

1. After you have found the course in the catalog (see instructions above), click on desired **Course Title** to view course details.
2. Click on the green **Add to Cart** button.
3. Click on the **Shopping Cart** icon in the menu bar.
4. Verify the course **title** and **price**.
5. Verify the desired **Quantity** – Click on the **Update** button if changed.
6. If applicable, enter your **discount code**. – Click the **Apply** button to activate the code.
7. Click on the **Checkout** button.
8. Click on the **Use this payment method** button.
9. Complete address and credit card information fields on the two subsequent screens.
10. Click on the **Submit** button. The Payment Confirmation page will display.
11. Click on the **Manage Access Keys** button.
12. Click on the **Assign** button for the course you wish to assign.
13. Enter the learner's (your) email address then press the Enter key or click outside the email box.
14. Click on the **Assign** button – The course will be placed onto YOUR training home page, and you may access the course immediately.



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COURSE ENROLLMENT (For Others)

How do I purchase a course and enroll OTHER INDIVIDUAL(s)?

IMPORTANT: Before you begin, make sure each learner has their own unique user profile (See instructions under the **User Profiles** section above).

1. After you have found the course in the catalog (see instructions above), click on desired **Course Title** to view course details.
2. Click on the green **Add to Cart** button.
3. Click on the **Shopping Cart** icon in the menu bar.
4. Verify the course **title** and **price**.
5. Verify the desired **Quantity** – Click on the **Update** button if changed.
6. If applicable, enter your **discount code**. – Click the **Apply** button to activate the code.
7. Click on the **Checkout** button.
8. Click on the **Use this payment method** button.
9. Complete address and credit card information fields on the two subsequent screens.
10. Click on the **Submit** button. The Payment Confirmation page will display.
11. Click on the **Manage Access Keys** button.
12. Click on the **Assign** button for the course you wish to assign.
13. Enter the first learner's email address then press the Enter key or click outside the email box.
14. **Repeat Step 13** for each additional learner.
14. After all learners' email addresses have been entered, click on the **Assign** button – The course will be placed onto each learner's training home page.
15. Notify each learner that the course has been added to their home



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COURSE ENROLLMENT (For Others)

How do I assign a course to another individual(s)?

Follow the 5 Key Steps below:

(1) Create a new assignment

IMPORTANT: You must have **Administrator Access** to perform this function.

1. Place your cursor over **Manage** in the navigation bar.
2. Select **Training**. The Training Page displays.
3. Click on the **Manage Training Assignments** link. A list of current training assignments displays.
4. Click on the **Create Training Assignment** button.
5. Select the **Edit** icon next to the **Unnamed Assignment** field.
6. Name the assignment the same as the course you are assigning, followed by the current year and your initials.
For Example: Customer Service Basics 2021 (DLS)
7. Click on the **green checkmark** button to save your changes.
8. Proceed to next key step below.

(2) Add the course

1. Click on the **Content** tab.
2. Click on the **Add Content** button. The *Add Content* window displays a list of active courses.
3. Click in the **search field** and enter one or two words from the course's title.
4. Click on the **Search** button (Magnifying glass).
5. Click in the **check box** for the course you wish to assign. **Select one course only.**
6. Click on the **Add** button. The selected course is added to the assignment.
7. Proceed to the next key step on Next Page.



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COURSE ENROLLMENT (For Others)

(3) Add assignees

1. Click on the **Assignees** tab.
2. Click on the **Add Assignees** button. The Add Assignees window displays a list of active employees.
3. Click in the search fields and enter name of an individual to find specific users.
4. Click on the **Search** button. The list of assignees updates, matching your search criteria.
5. Click in the **checkboxes** to select the assignees you want to add.
6. Click on the **Add** button. The selected user(s) are added to the assignees list.
7. Repeat steps 2-6 to add additional assignees to the assignment.
8. Proceed to the next key step below.

(4) Select a due date

1. Click on the **Due Date** tab.
2. Click on the **Change** button. The Assignment Due Date window displays.
3. Click on the **Yes/No** toggle and change it to **YES** to indicate that the assignment has a due date.
4. For the **Is this a recurring assignment?** radio button, select **NO**.
5. For the **When is it due?** radio button, select the **Within** option is recommended, and enter the desired time period.
6. For the **Previous completions** setting, leave the default on **NO**.
7. For the **Allow completions after due date setting**, select **YES**.
8. Click on the **Email Reminders** link to schedule system email reminders to assignees. (Suggested)
9. For the **Send extension emails** setting, leave it on **YES**.
10. Click the **Save** button. A summary of your selections displays on the Due Date tab.
11. Proceed to the next key step below.

(5) Activate the assignment

1. Select the **Assign** button. Each learner will receive an email notification.
Note: Once an assignment has been made, the due date/period cannot be changed. However, extensions can be applied to each learner.



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COURSE ENROLLMENT (For Others)

What are best practices when assigning courses?

- Name each course assignment after the course you are assigning
- Assign only one course per assignment
- Always include a Due Date using the **Within** option
- Give learners an adequate time period to complete the assignment
- Track their progress using the **Training Assignment Dashboard**

How do I view learner progress on an assigned course(s)?

The **Training Assignment Dashboard** provides administrators and organization managers with a high-level summary of training assignment data. Information includes the percentage of users who are overdue for their training, the organizations and managers with the most overdue learners, and a list of items overdue for each user.

To view the Training Assignment Dashboard:

1. Place your cursor over your initials or avatar in the navigation bar.
2. Select the **Reports** option. A page listing available reports and dashboards displays.
3. Find the **Training Assignment Dashboard** in the Dashboards area.
4. Click on the **Open** button for the dashboard.



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COURSE ENROLLMENT (For Others)

How do I extend an assignment due date?

IMPORTANT: You must have **Administrator Access** to perform this function.

1. Place your cursor over **Manage** in the navigation bar.
2. Select the **Training** option. The Training page displays.
3. Click on the **Manage Training** link.
4. Click on the **Options** dropdown button and select **Manage Extensions & Exemptions**. A search screen will display.
5. Enter all or part of the assigned course title you wish to apply an extension to.
6. Click on the **Search** button. A list of courses matching your search displays.
7. Click on the **GO** button for the desired course. A search screen displays.
8. Enter the name of the learner for whom you would like to apply an extension. Leave the fields blank for list of all assignees.
9. Click on the **Search** button. A list of assignees matching your search displays.
10. Locate the desired assignee on the list and click on **Action** dropdown box and select **Apply Extension**.
11. Click on the corresponding **GO** button. The Apply Extension window displays.
12. Enter the number of days you would like to extend the assignment by.
13. Enter the reason for the extension.
14. Click on the **Apply Extension** button. The assignees due date will be adjusted accordingly.



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COURSE ENROLLMENT (For Others)

How do I cancel an assignment?

For a specific learner:

IMPORTANT: You must have **Administrator Access** to perform this function.

1. Place your cursor over **Manage** in the navigation bar.
2. Select the **Training** option. The Training page displays.
3. Click on the **Manage Training** link. Current training assignments will be listed.
4. Click on the **desired assignment**.
5. Click on the **Assignees** tab.
6. Click on the **check box** next to the employee's name(s) you wish to remove.
7. Click on the **Remove** button.

For ALL learners:

IMPORTANT: You must have **Administrator Access** to perform this function.

1. Place your cursor over **Manage** in the navigation bar.
2. Select the **Training** option. The Training page displays.
3. Click on the **Manage Training** link. Current training assignments will be listed.
4. Click on the **check box** for the desired assignment.
5. Click on the **Delete** button.
6. From the delete confirmation pop-up, click on the **OK** button.



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EXAMS

How do I access my exam after I have completed my certification course?

1. Locate your course on your **Current Training** page.
2. Click on the course's **View** button.
3. Scroll to the **bottom** of the course's content page.
4. Click on the **View/Review** button for the exam.

How many exam attempts am I allowed?

Up to three (3) attempts are allotted for each certification course.

How do I re-access my exam for subsequent attempts?

1. Locate your course on your **Current Training** page.
2. Click on the course's **View** button.
3. Scroll to the **bottom** of the course's content page.
4. Click on the **View/Review** button for the exam

How do I access my Nan McKay exam?

If you took your certification course with a live Nan McKay instructor, you will receive an email directly from Nan McKay containing a link to your exam. Follow the instructions provided in the email. If the link does not work, contact Nan McKay for assistance.



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GROUP VIEWING

What is group viewing?

Group viewing allows you to view a qualified course as a group from your personal user profile using a single computer and then mark the course completed for each attendee. Not all courses are available for group viewing, and this option is available to **subscribers only**.

How do I get access to group viewing for my organization?

Submit a **Support Request** and in the description, state that you would like to activate group viewing for your organization.

How do I run a group viewing session?

You need to know:

- Group viewing is only available to subscribers
- Group viewing is only available for non-CEU courses
- Only a group viewing proctor can issue a course credit
- Each attendee must have a personal user profile to be issued credit.

Before scheduling a session, verify the course is accessible for group viewing:

IMPORTANT: You must have **Administrator Access** to perform this function.

1. Select **Manage** from the menu bar, and then select **Training**.
2. Under Quick Links, click on **Manage Enrollment**.
3. Click in the **Search for** box and enter the name of the course you plan on viewing. Leave the Search Box blank for a list of all courses.
4. Click on the **See More Search Criteria** link.
5. Click in the **Type** dropdown box.
6. Select **Curriculum**.
7. Click on the **Search** button. If the course is listed, it is available for group viewing. If it is not, it must be assigned to individual learners.

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GROUP VIEWING

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What you will need for each session:

1. Internet connection
2. Large monitor or projector
3. Adequate sound system
4. Sign-in sheet
5. Planner & checklist (optional)

To run a session:

1. Make sure you have verified that the course you plan on showing is approved for group viewing. [See Before Scheduling a Session](#) (Pg 36)
2. Log into HAI Group Online Training using your personal user profile.
3. Add the course to your personal training home page.
4. Attach your computer to a large monitor/projector and adequate sound system.
5. Play the entire course for attendees.

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GROUP VIEWING

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To record attendance after all course parts are completed:

IMPORTANT: You must have **Administrator Access** to perform this function.

1. Select **Manage** from the gray menu bar, and then select **Training**.
2. Under **Quick Links**, select **Manage Enrollment**.
3. Select the **Search for** field and enter the name of the course. Leave the search field blank for a listing of all courses.
4. Select the **See More Search Criteria** link.
5. Click in the **Type** dropdown box.
6. Select **Curriculum**.
7. Select the **Search** button.
8. Locate the course viewed from the list and select its corresponding **Enroll Users** button.

IMPORTANT: Click on the course's **i** button to verify its **Content Type** is **Curriculum**.

9. Select the **Search** field and enter an attendee name, or leave blank to pull a list of all learners in your organization.
10. Select the **Search** button.
11. Select (check) each user who attended the session.
12. Scroll to the bottom of the screen and change **Mark Enrollees Complete** to **Yes**.
13. Select the **Batch Enroll Users** button.
14. In the **Reason for Action** pop-up window, enter **Group View** and the **date of the session**. (Ex: Group View – 1/1/2019)
15. Select the **Batch Enroll Users** button. All selected users have been recorded as *completing* the course.



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QUESTIONS ABOUT COURSE CONTENT

Where can I go to learn more about a specific course?

1. Go to www.htvn.org
2. Log in using your personal login credentials OR click on the **Browse Public Catalog** link.
3. Enter all or part of the course title into the **Search Catalog** box.
4. Select the course from the dropdown list OR click the **Search** (magnifying glass) button to get a list of all courses matching your search criteria.

Which certification courses do you currently offer?

Visit our [certification listing](#).

COURSE WORKBOOKS

How do I access my digital course workbooks in my certification course?

1. From your training home page, open your course by clicking on the **View** button.
2. From the course's content page, click on the **Getting Started with Your Course** box at the top of your content list.
3. Click on the document you wish to access.

How do I order physical copies of my workbooks for my certification course?

Email sales@nanmckay.com with the name and quantity of workbooks and master books you wish to purchase.



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FEEDBACK AND RECOMMENDATIONS

I think I found incorrect information in one of my courses. How do I report my findings?

Submit a [Support Request](#) and provide the details on the incorrect information. Be sure to include the **course title** and **part name**.

How do I leave course content feedback?

Once you have completed the course, complete the **course survey**. Our team reviews all feedback for a better learning experience.

How do I suggest recommendations for new content?

Submit a [Support Request](#) and in the description box, provide full details of the type of course(s) you would like to recommend. Our team will follow up with you.



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AUDIO/VIDEO

How do I resolve my audio and/or video issues?

Most audio and video issues are caused by a setting in your web browser or a poor internet connection. Following the tips below should resolve most audio or video issues.

Tips:

- Use **Google Chrome** or **Firefox**. (*Course videos are **NOT optimized** to work on Internet Explorer, Microsoft Edge, or Safari*)
- Verify that all pop-up blockers have been disabled.
- Clear your web browser's history/cache.
- Try connecting on a LAN line instead of using Wi-Fi.
- If there is no audio, verify that a headset or speakers are plugged into your device and that the volume is turned up.

How do I play content on my mobile device?

Most courses will work on a mobile device. However, make sure you use Google Chrome as your web browser and have disabled pop-up blockers. If you are using an Apple device, you can download Google Chrome from the App Store. Please keep in mind that some courses will not work on mobile devices.



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EXAM

Before you start your exam:

1. Use a desktop or laptop computer. **Do not attempt** to take your exam on a mobile device.
2. Use a secure LAN line connection if possible. If you must use a Wi-Fi connection, make sure it is secure, and you have a strong signal.

What do I do if I lose internet connection during my exam?

1. Close your web browser.
2. Verify you have a reliable internet connection. Do not proceed until you have a stable internet connection.
3. Re-open your web browser.
4. Log in to your HAI Group Online Training account at www.htvn.org.
5. Open the course from your training home page.
6. Scroll down to the exam on the course's contents page.
7. Click on the exam's **Review** button. The exam will re-open.
8. Complete and submit the preliminary questionnaire (if applicable). The first set of questions on the exam will open, and a timer will appear in the upper right-hand corner of the screen, indicating how much time you have remaining to complete your exam.
9. Use the page buttons to navigate where you left off before you were disconnected.
10. Complete all remaining questions and submit.

If you require additional assistance, submit a [Support Request](#) form, and a customer success specialist will contact you.



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PAYMENT

My payment didn't go through; what now?

An unsuccessful payment attempt likely means that your authorizing bank has canceled your transaction. We are not always privy to why a bank chose to cancel a transaction, but no funds were exchanged in the event of a canceled transaction. Instead, your bank may have placed a temporary pending charge on your credit card. Speak with your authorizing bank or credit card company to discuss the following:

1. Why your transactions were canceled
2. If there are any pending charges, and when they can be removed
3. What steps you need to take on your next transaction.

My payment went through; how do I start my training?

1. From your training home page, place your cursor over your **initials** in the menu bar and select **Orders**.
2. Click on the **Manage Access Keys** button.
3. Locate the purchased course on the list.
4. Click on the **Assign** button for the course you wish to assign.
5. Enter YOUR email address, and then press the **enter** key or click outside the email box.
6. Click on the **Assign** button – the course will be placed on YOUR training home page.



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PAYMENT

My payment went through; how do I give access to other individuals?

1. From your training home page, place your cursor over your **initials** in the menu bar and select **Orders**.
2. Click on the **Manage Access Keys** button.
3. Located the purchased course on the list.
4. Click on the **Assign** button for the course you wish to assign.
5. Enter the first learner's email address, and then press the **enter** key or click outside the email box.
6. **Repeat step 5** for each additional learner.
7. After all learners' email addresses have been entered, click on the **Assign** button – the course will be placed onto each learner's training home page.
8. Notify each learner that the course has been added to their home page.



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REPORTING TOOLS

What type of reports are available?

- **Content access report:** A listing of which courses have been accessed by each employee in your organization within a specified time.
- **Purchases report:** A detailed listing of all courses purchased by your organization within a specified time.
- **Training assignments report:** A listing of courses that have been assigned and their current status by the assignee.
- **Training progress report:** View training progress information for users, including score (if available). Detailed information is available through drill-down reports.

Who can access reports?

Your organization's **system administrator** is the only person that can access reports.

How do I run reports?

IMPORTANT: You must have **Administrator Access** to perform this function.

1. Place your cursor over **Administer** in the navigation bar.
2. Select the **Reports Console**—the *Reports Console Search* window displays.
3. Click on the **Search** button. (Do not enter any search criteria.) A listing of report options is displayed.
4. Click on the **desired report**—a verification screen displays.
5. Click on the **Select** button—the report criteria page displays.
6. Under **Training Types**, select **Curriculum**.
7. Click in the **Start Date** box, and enter the *first date* of records you wish to include on the report.
8. Click in the **End Date** box, and enter the *last date* of records you wish to include on the report.
9. Click on the **Run Report** button. The report will open in a new window.
10. To **display additional fields**, click on the **Cog** icon and select the fields you wish to include in the report.
11. Click on the **OK** button to refresh the report.
12. Click on the **Export to Excel** link if you wish to export the data to an Excel spreadsheet and do further filtering, sorting, or grouping.



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ERROR MESSAGES

Message: “Something went wrong.”

After processing payment: This message indicates that your credit card’s bank will not authorize payment. You will need to contact your credit card’s bank to resolve the issue. Once the issue has been resolved, you may try processing your payment again. Do not attempt to process your payment again until you have contacted your bank.

Message: “Something went wrong.”

Any other time: This message indicates that there was an interruption with your internet connectivity. Close your web browser and log back into your profile. If the issue persists, give it a little time before attempting to log back in. The problem will resolve on its own.

Message: “You do not have permission to view this content.”

There may be a number of reasons for this message. Submit a [Support Request](#), and a customer service specialist will assist you.

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