



**eFINDS 3.0**  
**CTI-502 Application Training**

# **Participant Guide**

**Commerce Training Institute**

**Rev. May 2018**

# Contents

<b>TO DO PRIOR TO JOINING THE CTI SESSION .....</b>	<b>3</b>
<b>POP-UP BLOCKERS .....</b>	<b>3</b>
<b>ADDITIONAL ASSISTANCE .....</b>	<b>3</b>
<b>TO JOIN YOUR CLASS .....</b>	<b>4</b>
<b>OBJECTIVES .....</b>	<b>6</b>
<b>PREWORK.....</b>	<b>7</b>
<b>ACCESS TO EFINDS.....</b>	<b>8</b>
<b>CONTACTS &amp; LOGISTICAL TRAINING INFORMATION.....</b>	<b>9</b>
<b>INSTRUCTORS.....</b>	<b>9</b>
<b>EFINDS SUPPLIES .....</b>	<b>9</b>
<b>NEED EFINDS SUPPLIES? .....</b>	<b>10</b>
<b>CHAPTER 1: OVERVIEW .....</b>	<b>11</b>
<b>CHAPTER 2: ROLE AND PERMISSIONS.....</b>	<b>12</b>
<b>CHAPTER 3: TRAINING SCENARIOS .....</b>	<b>14</b>
<b>TRAINING SCENARIO 1: SENDING FACILITY REGISTERS PEOPLE IN EFINDS.....</b>	<b>14</b>
<b>TRAINING SCENARIO 2: UPDATE STATUS TO EVACUATED .....</b>	<b>15</b>
<b>TRAINING SCENARIO 3: RECEIVING FACILITY CHANGES CURRENT LOCATION AND STATUS TO RECEIVED .....</b>	<b>15</b>
<b>TRAINING SCENARIO 4: RECEIVING FACILITY CHANGES STATUS TO REPATRIATION INITIATED.....</b>	<b>16</b>
<b>TRAINING SCENARIO 5: SENDING FACILITY CHANGES STATUS TO REPATRIATED.....</b>	<b>16</b>
<b>TRAINING SCENARIO 6: SENDING/EVACUATING FACILITY REPORT .....</b>	<b>17</b>
<b>TRAINING SCENARIO 7: SENDING FACILITY UPLOADS EFINDS SPREADSHEET .....</b>	<b>17</b>
<b>TRAINING SCENARIO 8: SENDING FACILITY UPDATES INTENDED LOCATION AND STATUS TO EVACUATED .....</b>	<b>18</b>
<b>TRAINING SCENARIO 9: QUICK SEARCH.....</b>	<b>19</b>
<b>TRAINING SCENARIO 10: RECEIVING FACILITY REPORT.....</b>	<b>19</b>
<b>REVIEW QUESTIONS .....</b>	<b>20</b>
<b>CHAPTER 4: HANDS-ON EXERCISES .....</b>	<b>21</b>
<b>COMPLETING THE COURSE .....</b>	<b>22</b>
<b>COMMERCE TRAINING INSTITUTE QUICK REFERENCE .....</b>	<b>23</b>

## To Do Prior to Joining the CTI Session

New York State Department of Health uses Cisco WebEx Technology to host online educational presentations during which participants can submit questions and comments. These training sessions are also known as Webinars. Below is a short list of requirements for participating in a Commerce Training Institute (CTI) Webinar.

### BEFORE ATTEMPTING TO JOIN A CLASS

Verify your Internet connection

Make sure the WebEx Training Manager plug-in can install

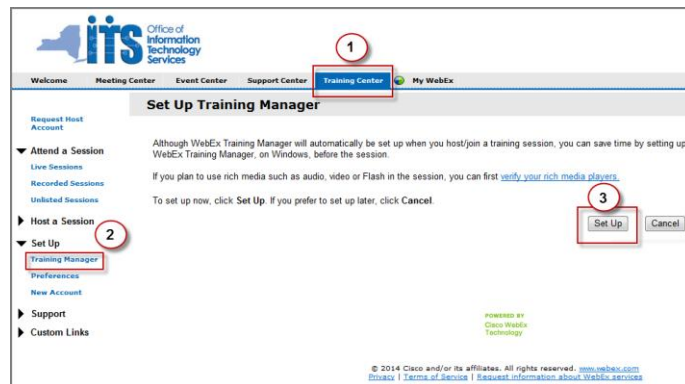
Disable pop-up blocking software or allow pop-ups for the domain <https://meetny.webex.com>

Be near a telephone for the audio portion of the presentation

To participate in NYSDOH on-line trainings, you must be able to install and use Internet browser plug-ins. This typically requires that you have administrative rights on the computer you intend to use for the training. If you do not have rights to install software on the computer you intend to use, or are unsure if you can install software on that computer, please contact your information technology staff before attempting to connect to the meeting.

The required plug-in is called WebEx Training Manager and is designed to self-install upon joining a meeting. If you prefer, the plug-in can be downloaded and installed ahead of time.

1. Go to <https://meetny.webex.com>
2. Click **Training** tab
3. Click **Set Up** from the left panel
4. Click **Training Manager**
5. Click the **Set Up** button



### Pop-up Blockers

Pop-up blockers have been known to prevent participants from successfully joining NYSDOH Webinars. Please be sure to disable any pop-up blocking software or explicitly allow pop-ups from the domain <http://nysdoh.webex.com> before attempting to join the meeting.

### Additional Assistance

For additional help please contact WebEx technical support at 1-866-229-3239.

# To Join Your Class

You can begin to log into your course 10-20 minutes prior to the scheduled session start time. Learners are encouraged to arrive early to head off any technical issue they may encounter when joining the session.

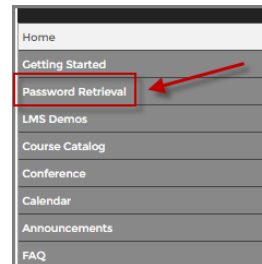
1. Prior to the session start time, log into the Learning Management System (LMS) at <https://www.nylearnsph.com>
2. Click **Launch Course** from the **My Current Courses** panel in the upper right of the LMS home page.

Alternately if you have hidden your **My Current Courses** panel, click **My Courses** in the **User Menu**

1. Click **Current Courses** (if not selected already).
2. Click **Launch Course** under the course heading.

Course Name	Section	Activities/Quizzes
CTI-210 HCS Coordinator Training & Certification CTI210 HCS Coordinator Training & Certification   Online <b>Unenroll</b>	Ongoing Details Messaging	
CTI-502 eFINDS version 3.0 Jan 26, 2017, 2-3 pm   Online <b>Launch Course</b>   <b>Unenroll</b>	1/26/2017 Details Messaging	

For assistance with your Learning Management System password or user name, use the "Password Retrieval" function. Select the appropriate option and either enter your email address or answer your secret questions.



For further assistance with your LMS account, send email to: [edlearn@health.state.ny.us](mailto:edlearn@health.state.ny.us)

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**Note:** **Do NOT call trainers** for technical support at the time of your class. Your instructor will be engaged in conducting the class and you will only reach his or her voicemail. For technical support once a class has begun, call WebEx Support at 1-866-229-3239.

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## Welcome!

Welcome to the Commerce Training Institute's overview of the Evacuation of Facilities in Disasters Systems 3.0 (eFINDS).

This course will prepare evacuating and receiving facilities on how to upload and update patient/resident location information in the eFINDS application on the Health Commerce System

<https://commerce.health.state.ny.us>.

Please be sure to:

- Attend from a location with access to a telephone. A speakerphone or headset is highly recommended. Audio for this course is via telephone only; there is no voice-over-IP option.
- Work at your own computer. This is a hands-on course. Students may be expected to complete several exercises during this program. Group attendance from a conference room, etc. is not recommended.
- Print this participant guide and have it readily available when you come to class. This guide contains instructions and exercises for participating in the classroom activities.
- Check the syllabus for any pre-class assignments. It is very important that you complete any pre-class work if you are to participate in the online sessions.

In addition to the class work, this guide also contains several resources such as a handy guide to the tools available within our on-line classroom and a glossary of terms to help you get the most out of your class.

Please note the password for this, and all Commerce Training Institute courses is **welcome2**.

We look forward to seeing you on-line!

Sincerely,

**Valerie Shuba**

Learning Management Training Specialist  
NYSDOH

## **TARGET AUDIENCE**

The target audience for this curriculum is all state and local health department, acute and non-acute healthcare providers, and temporary shelter staff who will be responsible for entering and maintaining evacuee tracking information in eFINDS during declared operational periods.

## **Objectives**

**At the end of the training session, the participant will be able to:**

- Identify the roles needed to access eFINDS, and the permissions granted to those roles.
- List the new statuses in eFINDS 3.0 and the corresponding actions and buttons used to update the status.
- Determine which report to select to review certain data about an operation, a facility or person, and which reports can be exported.

### **As an Evacuating/Sending facility**

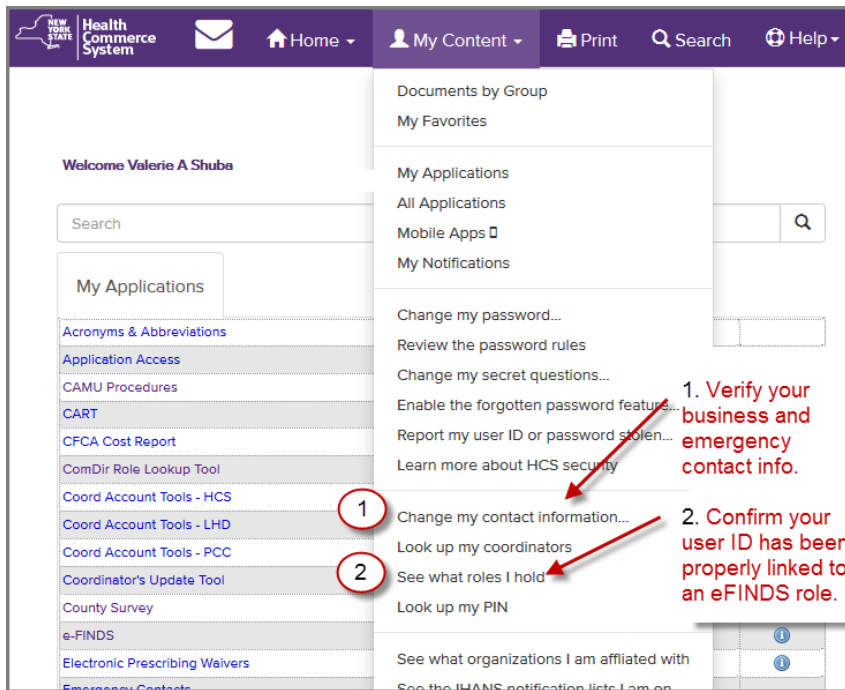
- Determine best method to register people and update their statuses to Evacuated, SIP or Repatriated.

### **As a Receiving Facility**

- Determine the best method to receive people from an evacuating facility, and update their status to Received, Repatriated Initiated or Will Not Repatriate.

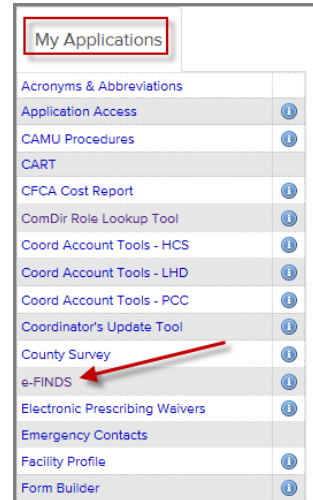
## Prework

1. Have your Health Commerce System user ID and password available for use
2. Verify that your business and emergency contact information is correct
3. Confirm you have been assigned the proper role to access the eFINDS



## Access to eFINDS

- Role assignments will be granted by the facility's Health Commerce System Coordinator
- County Health Department role: eFINDS Reader
- Two roles are available at the facility level: eFINDS Data Reporter and eFINDS Administrator
- Once you have been added to the role, eFINDS will appear in My Applications



## SYNCHRONOUS CLASS

DATE: \_\_\_\_\_

- Verify all prework has been completed
- Notify your coworkers you will be in class
- Clear away other distractions
- Log into your session at least 10 minutes early. You may log in as early as 20 minutes prior to session start time
- Print this participant guide and have it available during class



## Contacts & Logistical Training Information

### *Instructors*

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### ***eFINDS Supplies***

- Real Evacuation Wristbands (quantity based on licensed beds)
- Scanner
- Barcode Assignment Scannable Log (PDF)
- eFINDS Mobile installed on iOS and/or Android devices

#### **For training and exercises:**

- Training Wristbands (Marked for Training and barcodes end with a D for demonstration)
- Scanner
- Training Barcode Assignment Scannable Log (PDF)
- eFINDS Mobile installed on iOS and/or Android devices

## **NEED eFINDS Supplies?**

**For Training** the user in the eFINDS Reporting Administrator role can provision/generate additional barcodes for training.

To do so the eFINDS Admin. at your facility will follow these steps:

1. Open **eFINDS**
2. Click **Practice Only**
3. Select Location (if necessary)
4. Click **Manage Barcodes > Generate Barcodes**
5. Verify your facility type and facility name
6. View # of existing barcodes for this location
7. Enter quantity needed and click **Generate Barcodes**.

Generally speaking, eFINDS Training wristbands are not printed or shipped, as the facility can utilize the PDF logs for training and exercises.

**For “Real” Evacuation Supplies** the user in the eFINDS Reporting Administrator role can request supplies by following these steps:

1. Open **eFINDS**
2. Click **Evacuation**
3. Select Location (if necessary)
4. Click **Supply Requests** on the main menu.
5. Choose **Create a New Supply Request \***
6. Fill in the form and click Submit New Supply Request.

You will receive email notifications regarding the status of your request.

\*Each facility was provided with one scanner during the initial roll-out of eFINDS and facilities are responsible for purchasing additional or replacement scanners (see attached for information on recommended scanner models).

The eFINDS mobile app can also be downloaded to a smart phone or tablet to scan barcodes. eFINDS Mobile is available for Android and iOS devices on both Google Play and the App Store.

# Chapter 1: Overview



What is eFINDS?

- Common platform for sharing patient and resident location information
- Secure, real time & easy to use
- Promotes data accuracy
- Time saving
- Allows collaboration between facilities, facility types, and temporary shelters
- Used for incidents, events or practice exercises

What does it do? Tracks evacuee movement

When is it used? Any full or partial facility evacuation

### **As an Evacuating/Sending facility**

- Determine best method to register people and update their statuses to Evacuated, SIP or Repatriated.

### **As a Receiving Facility**

- Determine the best method to receive people from an evacuating facility, and update their status to Received, Repatriated Initiated or Will Not Repatriate.

### **eFINDS 3.0 People Statuses and definitions**

- **Registered:** person to be evacuated is in eFINDS
- **Evacuated:** person has left evacuating facility, and is enroute to intended destination
- **Received:** arrived at intended destination/receiving facility and current location is updated
- **Repatriation Initiated:** receiving facility returns evacuee to their original facility
- **Repatriated:** evacuees arrive back to their original location/evacuated facility
- **Will Not Repatriate:** evacuees will not be returning to their original facility
- **SIP (Shelter in Place):** If the Chief Elected Official issues a mandatory evacuation order that includes a SIP option, evacuees can only remain in the defined evacuation zone with consent of NYSDOH.

**eFINDS 3.0 Actions and Buttons**

- Register
- Evacuate
- Cancel Evacuate
- Receive
- Cancel Receive
- Initiate Repatriation
- Cancel Initiate Repatriation
- Repatriate
- Cancel Repatriate
- Will Not Repatriate
- Cancel Will Not Repatriate
- SIP (Shelter in Place)
- Cancel SIP
- Save Edits

**Reports in eFINDS 3.0**

- List People
- Facility Report with export options to Excel or PDF
- Ability to export Tracking History and Locate People

**Notes:**

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## Chapter 2: Role and Permissions

What are the two eFINDS facility roles?

Who assigns the roles?

How can you verify that you are in the role?

What can a facility eFINDS Administrator do that an eFINDS Data Report cannot?

*See next page for answers*

### **eFINDS Reporting Administrator role**

This is a facility role and has the highest permissions. This role can:

- Register people with or without scanner
- Register people one at a time or upload the eFINDS spreadsheet
- Change a person's status one at a time or multiples
- Generate Barcode Assignment: Scannable Log (PDF log) or Download or Upload Spreadsheet (excel)
- Register multiple people without having barcodes to scan using the Multi Person Input

### **eFINDS Data Reporter role**

This is the facility role that can:

- Register people with or without scanner
- Register one at a time or upload the eFINDS Spreadsheet (excel)
- Change a person's status with or without scanner
- Change a person's status one at a time or multiples

### **eFINDS Reader role**

This is a role for NYSDOH Regional users or county health departments. The can only view the eFINDS data for facilities in their jurisdiction.

<b>Answers</b>
1. eFINDS Data Reporter & eFINDS Reporting Administrator
2. Coordinator assign roles
3. HCS My Content > See what roles I hold
4. Generate the Barcode Assignment: Scannable Log or spreadsheet

## Chapter 3: Training Scenarios

### **Training Scenario 1: Sending Facility Registers People in eFINDS**

- A Hurricane is predicted to strike three NYS counties, and your facility resides in one of the identified counties.
- Hurricane expected in three days.
- Your facility plans for a full facility evacuation.
- eFINDS supplies (scanner, wristbands and scannable logs) are located and wristbands are distributed to evacuees.
- For demonstration purposes, we will register two people.

Demonstrates how an evacuating facility would register people with a wristband by either scanning or typing in the barcode number.

1. Click **Register People** > Scan a barcode from the Scannable Log (pdf)
2. Confirm: **Status Available** This means barcode is located and no person is registered to it.
3. Enter \*First Name, \*Last Name, \*DOB (mm/dd/yyyy) & Select Gender
4. Select or Verify **Evacuation Operation** (reason for evacuation in scenario 2)
5. Verify person's current location is correct
6. Select the Intended Destination from dropdown list
7. Click the **Register**

Required fields are marked with \* Check the Confirm Submission Without Required Fields box, if necessary then click Register

8. Confirm message: **Register** is completed.
9. Repeat Steps 1 – 8 for second person, but in step 1 Type in the other barcode #.

#### **Notes:**

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## **Training Scenario 2: Update Status to Evacuated**

- An ambulette is ready to take your two evacuees to their intended destination.
- Update Person Status to Evacuated.

Demonstrates how to update a current location (in this case the intended destination/receiving facility) and change a person's status to Received.

1. Click **Manage People > Person Lookup**
2. Scan or Type Barcode > Click **Search**
3. Verify Person Info is correct
4. Enter Evacuee Group Description; such as Bus #, transportation description or facility unit (optional)
5. Click **Evacuate**
6. Confirm message: Evacuate is completed & Status: Evacuated
7. Repeat steps 1 – 5 for second person.

### **Notes:**

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## **Training Scenario 3: Receiving Facility Changes Current Location and Status to Received**

- The ambulette just arrived with the two evacuees.
- Change current location and update status to Received.

Demonstrates how to update a current location (in this case the intended destination/receiving facility) and change a person's status to Received.

1. Click **Manage People > Person Lookup**
2. Scan or Type Barcode > Click **Search**
3. Change Current Location Org. Type & Current Location (Receiving Facility)
4. Click **Receive**
5. Confirm message: Receive is completed & Status: Received
6. Repeat steps 1 – 5 for second person.

### **Notes:**

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## **Training Scenario 4: Receiving Facility Changes Status to Repatriation Initiated**

- Power has been restored and the water damaged areas of the Sending Facility have been repaired. Facility has been inspected and people can return.
- The two evacuees are being sent back.

Demonstrates how the receiving facility would change a person's status to Initiated Repatriation to indicate that people are being returned to original facility.

1. Click **Manage People > Multi Person Update**
2. Select Operation, Original location org. type and location
3. Select Action: **Initiate Repatriation**
4. Click **List**
5. Select people with check/click OR select all by checking box in column heading
6. Click **Initiate Repatriation of Selected**
7. Verify Initiate Repatriation completed for two people.

### **Notes:**

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## **Training Scenario 5: Sending Facility Changes Status to Repatriated**

- The two people have arrived back to their original facility.

Demonstrates how the evacuating facility will receive their people back and change their status to Repatriated when the operation is over.

1. Click **Manage People > Multi Person Update**
2. Select Operation, Original location org. type and location
3. Select Action **Repatriate**
4. Click **List**
5. Select people with check/click OR select all by checking box in column heading
6. Click **Repatriation of Selected**
7. Verify Repatriation completed for two people.

### **Notes:**

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## **Training Scenario 6: Sending/Evacuating Facility Report**

- People have been repatriated, and you would like to confirm that all statuses and current locations are up to date and correct.

Demonstrates how the evacuating facility can review current location, status and other details about for an identified operation.

1. Click **Reports > Facility Report**
2. Select **I am an evacuating facility**
3. Verify Organization Type, Location/Facility
4. Select **Operation**
5. Click **Generate Report**
6. Verify two people have been **Repatriated** and current location is original location.

### **Notes:**

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## **Training Scenario 7: Sending Facility Uploads eFINDS Spreadsheet**

- A Hurricane is making its way east, therefore your facility is preparing to have a full facility evacuation. The exact path of the hurricane is still not determined as it is still five days out.
- If full facility is evacuation is warranted, the facility would like to utilize the eFINDS Spreadsheet. For demonstration purposes, we will only input info for two people using this method.
- The Operation had been created by NYS call <current date> HURRICANE TEST NYS

Demonstrates how the evacuating facility's eFINDS Reporting Administrator can download the Barcode Assignment: Uploadable Spreadsheet, save it with the evacuee's info and upload it to eFINDS to register the people in the system.

### **eFINDS Reporting Administrator Role Only**

1. Click **Manage Barcodes > Download Barcode Documents**
2. Enter Start & End Barcode Number (optional)
3. Select Barcode Assignment: Uploadable Spreadsheet (excel)
4. Click **Download Document**
5. Click Save and Open NYS\_eFINDS\_<facility ID Date Time>\_Training
6. Populate First Name, Last Name, DOB and Gender
7. Save file to your network
8. Print file (optional, but recommended).

Upload file to eFINDS Practice Only (for either eFINDS Data Reporter or eFINDS Reporting Admin role):

1. Click **Register People > File Upload**

2. Select **Operation** <current date> HURRICANE TEST NYS
3. Click recycle icon, if operation does not display
4. Locate Excel file with saved person information (NYS\_eFINDS file name with facility id, date and time OR other file name)
5. Click **Open** to add file
6. Click **Upload**
7. Verify Info is correct, and edit if necessary
8. Click **Register**
9. Verify message: Registered 2 people.

**Note:** If Excel file has no person info, then the file cannot be uploaded. OR if barcode does not have a person affiliated with a barcode, then barcode will remain available.

**Remember:** The role of eFINDS Data Reporter cannot download the spreadsheet, but they can maintain it on their network and upload it when the operation is created or made active.

**Notes:**

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***Training Scenario 8: Sending Facility Updates Intended Location and Status to Evacuated***

- The file uploaded in scenario 7 will automatically assign the people to an operation, and update the status to Registered, but they will still need to be assigned to an Intended Destination.
- For practice purposes, please update the two-people’s intended destination, and mark their status as evacuated.

Demonstrates how the evacuating facility can update multiple records to include the intended destination and change status to Evacuated.

1. Click **Manage People > Multi Person Update**
2. Select Operation, Original location org. type and location
3. Select Action **Evacuate** > Click **List**
4. Select people with check/click OR select all by checking box in column heading
5. Select Intended Destination Org Type & Intended Destination
6. Click **Evacuate Selected**
7. Verify Evacuation completed for two people.

**Notes:**

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## Training Scenario 9: Quick Search

- You are looking for the current location of an evacuee
- You want to know if they have been received at the intended facility.
- You do not have the barcode number or the evacuees last name

Demonstrates the Quick Search feature to find a person with minimal search criteria, such as a partial first or last name or content from the person's Note field.

1. Click **Quick Search** from eFINDS menu bar
2. Enter search criteria in the Quick Search box, e.g., name or contents of Note field "insulin"
3. Click **Search**
4. Verify: Found # person for the keyword(s): 'search criteria' Please select one to view details.
5. Locate the record to be viewed or updated
6. Click the Barcode link
7. View record and add the necessary information into Note field
8. Click appropriate action button, such as **Save Edits** if needed

To perform a quick search, you only need to enter a minimum of two characters, such as two letters in first or last name, the barcode #, or contents in the medical record or note section.

### Notes:

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## Training Scenario 10: Receiving Facility Report

- You are located at the Receiving Facility
- You are waiting for people to arrive and would like to see how many people have been registered and have your location in the Intended Destination field. Demonstrates how a receiving facility can see how many evacuees to expect.

1. Click **Reports > Facility Report**
2. Select **I am a receiving facility**
3. Verify Organization Type, Location/Facility
4. Select **Operation**
5. Click **Generate Report**
6. Verify two people have been **Repatriated** and current location is original location.

### Notes:

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## REVIEW QUESTIONS

1. What two steps would an evacuating facility take to initiate tracking a person in eFINDS?
2. You can verify the roles linked to your user ID by clicking \_\_\_\_\_ > \_\_\_\_\_ .
3. True or False: The eFINDS Data Reporter can download the Barcode Assignment: Scannable Barcode Log.
4. Of the seven eFINDS statuses, which one is missing? Registered, Received, Repatriation Initiated, Will Not Repatriate, SIP.
5. True or False: If you accidentally change a person's status to received, you can cancel the action and their status will return to either registered or evacuated.
6. True or False: If you are the receiving facility and an evacuee is discharged you update their status to Will Not Repatriate and add the date of discharge to the Note field.
7. True or False: The receiving facility can update an evacuee's status to Repatriation Initiated when they are being sent back to their original location.

**Answer Key**

1. Register person and assign to an intended destination facility
2. My Content > See what roles I hold
3. False
4. Evacuated
5. True
6. True
7. True

## **Chapter 4: Hands-on Exercises**

### **FACILITY DRILL**

- Your facility has been identified, for this practice exercise, as needing to evacuate.
- The operation has been announced as HURRICANE TEST NY. In preparation for the drill, you have received wristbands from the New York State Health Department for your residents. A colleague began registering the people, but could not finish.
- A person from another facility just arrived at your facility while you prepare to evacuate your own people.

### **EXERCISES:**

1. Log into Commerce (if not already logged in <https://commerce.health.state.ny.us>)
2. Copy and paste the eFINDS Demo link below into the browser address window:  
  
<https://commerce.health.state.ny.us/doh2/applinks/pattrackd>
3. Select your location
4. What is the person's name for barcode NH888901061D?
5. What is person's current location?
6. Receive this person to your facility:
7. If you are an eFINDS Reporting Administrator, then register two (2) evacuee in Practice eFINDS by generating an Uploadable Spreadsheet (excel).
8. Update one of the people you just registered to Shelter-In-Place (Hint: Current Location needs to match the Intended Location.
9. Evacuate the other person to any facility.
10. Update one of your people by entering content into the Note section and Save Edits.

## Completing the course

To receive credit for participating in the training session, you must attend the scheduled WebEx session. Please allow 24-48 hours for the course administrator to complete you in the training.

Your feedback on the presentation is requested. To send us your comment about the training, please complete the course evaluation.

1. Log on to the learning management system [www.nylearnsph.com](http://www.nylearnsph.com)
2. Click **My Courses**
3. Current courses should be the active page, if it is not, click Current Courses
4. Under **Activities/Quizzes** click the [CTI Course Evaluation](#) and submit your comments.

# Commerce Training Institute Quick Reference Card

**MENU BAR:**  
Use the menu bar to access Training Center features.

**ANNOTATION TOOLS:**  
If enabled allows you to draw or type on documents, presentations and whiteboards.

- Use to place your pointer on the screen.
- Use to type text.
- Use to draw straight lines and arrows.
- Use to draw shapes.
- Use to highlight items or draw freehand shapes and lines.
- Use to select the color of your annotations.
- Use to erase your pointers and annotations.

**WHITEBOARD/PRESENTATION AREA:**  
Slides and documents will be displayed here. All slides and documents are white boards and can be annotated.

**TABS:**  
If allowed, select which document, presentation, or whiteboard to view.

**PANEL BUTTONS:**  
Click to open a panel. Use the dropdown to find additional panels.

**PARTICIPANT PANEL:**  
Contains the list of participants and feedback buttons.

- Teleconference connected
- Muted Click to mute/unmute
- Participant name
- Webcam available (Click to broadcast to group)
- Go Slower
- Go Faster
- Raise hand
- Yes No
- Emoticons
- Poll Results
- Open Audio Options
- Change Participant Panel View

**SESSION NUMBER, TELECONFERENCE CONNECTED INDICATORS:**  
Displays the session number and indicates if you are connected to the teleconference.

**THE CHAT PANEL**  
Send chat messages  
Type message in the message box.  
Select recipients.  
Click Send.

Select to whom you want to send the chat. Choices can be limited by the host.

**VIEW MENU:**  
Used to control your view of the presentation.

Full Screen View full screen  
79% Select zoom level  
Zoom in & zoom out

Show or hide thumbnails.  
Rotate page right or left.  
Synchronize Display with presenter, use to synchronize your view with the presenter.

**CONNECTED, SECURE INDICATORS:**  
Indicate if you are connected to the network (session) and if the session is secure. All BHNSM sessions are secure.