Closed Enrollment/Group Training Guidance for NIH ICs

This document outlines the process for ICs to request, coordinate and successfully manage closed enrollments/group training through the NIH Training Center (NIHTC).

# What is a Closed Enrollment?

**There are two types of classes offered at the NIH Training Center**:

* **Open Enrollments:** Classes available for all NIH staff to register for.
* **Closed Enrollments:**Classes made available exclusively for an IC and their employees.

Most classes in the NIHTC [Course Catalog](https://hr.nih.gov/training-center/course-catalog) can be offered as Closed Enrollments (Group Training/Closed Enrollment) and there are some classes that are *only* offered as Closed Enrollment Offerings (list of classes available [here](https://hr.nih.gov/training-center/services/group-training)). It’s important to note that while most classes in the NIHTC Course Catalog can be offered as a closed enrollment, there may be times when an open enrollment is a better option. The Training Center can help determine which option is better to meet your learning needs.

# Closed Enrollment Process

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|  | **Description of Tasks** | **Who is Responsible** |
|  | **Timeframe**: At least **8-10 weeks prior** to desired training timeframe | |
| **1** | **Inquiry and Request for Information**   * IC POC reaches out to the NIHTC about a closed enrollment offering for their class of interest. * IC POC is asked to review the [Group Training/Closed Enrollment](https://hr.nih.gov/training-center/services/group-training) website for additional information about closed enrollment offerings. | IC Point of Contact (IC POC)  NIHTC Program Manager (Virginia Tancheva) |
| **2** | **Request Form Submitted**   * IC POC submits the [Group Training/Closed Enrollment Inquiry Form](https://hr.nih.gov/training-center/group-training-closed-enr-inquiry). * NIHTC evaluates the information and schedules a brief meeting with the IC POC to discuss the training need: * Minimum/ maximum number of participants * Last time this class has been offered to the IC (if any) * Consideration of the Open Enrollment offerings * Cost to IC * Possible date(s) for the course(s) requested.   + Consider major events happening at your IC when inquiring about a specific date for training(s) to avoid scheduling conflicts (ex. All Hands, Town-Hall, other mandatory trainings). | IC POC  Virginia Tancheva |
|  | **Timeframe**: At least **7 weeks prior** to desired training timeframe | |
| **3** | **Training Vendor Availability**   * NIHTC reaches out to training vendor for availability. * *We will attempt to find availability around an IC’s desired training date, but there is no guarantee that the vendor or the NIHTC will have capacity to support during the desired timeframe and may suggest an alternate.* | Virginia Tancheva |
|  | **Timeframe**: **6–7 weeks prior** to desired training timeframe | |
| **4** | **Training Date Selected and Secured**   * NIHTC provides IC POC vendor availability and other training specifics, such as offering start and end time, maximum participants, and total IC cost. * IC POC confirms via email training date with the NIHTC from the option(s) provided within 5 business days.   + *Please note that the vendor may release the hold on the date(s) provided if they do not hear back in a timely manner. Five business days is the maximum timeframe to respond to the NIHTC, but sooner is preferred.* * NIHTC secures training date with the vendor and sends the IC a confirmation with the date approved. | Virginia Tancheva  IC POC  Virginia Tancheva |
| **5** | **IAA Established and Routed for Approval**  *An* Intra-Agency Agreement (*IAA) is a form outlining details about the closed enrollment offering, NIHTC and IC expectations, and is routed for signature to approve the transfer of funds from the IC to the NIHTC using the CAN provided.*   * NIHTC confirms date with the vendor and requests information from the IC POC needed for the IAA: * CAN to charge * Authorizing Approving Official’s name and title * Budget Approving Official’s name and title * NIHTC routes IAA for IC signature. * IC POC obtains Authorizing Official’s and Budget Approving Official’s signature and returns signed copy to NIHTC. | Virginia Tancheva  Virginia Tancheva  IC POC |
|  | **Timeframe**: **5–6 weeks prior** to training | |
| **6** | **Final IAA Provided and Next Steps Outlined**   * NIHTC obtains last signature on IAA, sends IC POC a final copy of the IAA, and communicates next steps (details about registration link, roster, calendar invite, etc.). Usually in one to two business days. | Virginia Tancheva |
| **7** | **Offering Created and Registration Link Provided**   * NIHTC creates the closed enrollment offering in the LMS and sends the registration link to the IC POC.   ***The IC POC should use the registration link provided by the NIHTC and must not create their own. The offering details, rosters, and completions are managed by the NIHTC in the LMS.***   * IC POC advertises closed enrollment to their audience and distributes NIHTC registration link for students to register. * Registration is restricted so only IC staff can register. * Students are registered with one click. After clicking the link, as long as there is space in the class, they are automatically registered (no approvals required). | NIHTC Training Coordinator (TC) ([Name])  IC POC |
|  | **Timeframe**: **2–3 weeks prior** to training | |
| **8** | **Enrollment is Monitored by IC**   * NIHTC provides periodic rosters to IC POC so they can monitor enrollment, on a weekly basis. * IC POC will confirm with the NIHTC that the class is running, or IC POC will contact the NIHTC to cancel the class due to low enrollment. * If the IC must cancel the closed enrollment, the IC POC contacts NIHTC as soon as possible, but **no less than 16 days prior** to the training start date. If the IC cancels less than 16 business days before the start date, no refunds will be honored. We strongly recommend communicating the closed enrollment class to your employees as soon as it has been scheduled and confirmed. * If the IC needs to **reschedule** the closed enrollment, the IC POC contacts NIHTC as soon as possible, but **no less than two weeks prior** to the training start date. If the reschedule is less than two weeks, IC incurs a fee of $100.00 per change. | [TC Name]  IC POC  IC POC |
|  | **Timeframe**: **1 week prior** to desired training timeframe | |
| **9** | **Pre-Offering Prep**   * All students who plan to attend training should be registered in the NIHTC offering in the LMS no less than a week prior to training. * NIHTC provides final roster of registered students to the IC POC and the training vendor. * NIHTC sends calendar invite with class information (virtual link, materials) to registered students and IC POC. | IC POC  [TC Name]  [TC Name] |
|  | **Timeframe**: **Day of training** | |
| **10** | **Training Attendance**   * During the training, IC POC (or vendor) should take attendance on the roster provided. * The IC POC/ Vendor sends the attendance roster to the NIHTC immediately after training concludes. | IC POC  IC POC |
|  | **Timeframe**: **1 day after** training concludes | |
| **11** | **Course Evaluation**   * NIHTC sends course evaluation to attendees (if not already provided during class by the instructor). | [TC Name] |
|  | **Timeframe**: **1 to 2 weeks after** training concludes | |
| **12** | **Completions & IC Feedback**   * NIHTC captures completion in the LMS using the attendance roster provided by the IC. Certificates of completion will be available in students’ Completed Learning transcripts in the LMS 2 weeks after class end date. * NIHTC checks in with IC POC to ensure a successful Closed Enrollment via [NIHTC Group Training/ Closed Enrollment Services](https://forms.office.com/g/iL65ktawGJ) Feedback Form. | [TC Name]  Virginia Tancheva |