



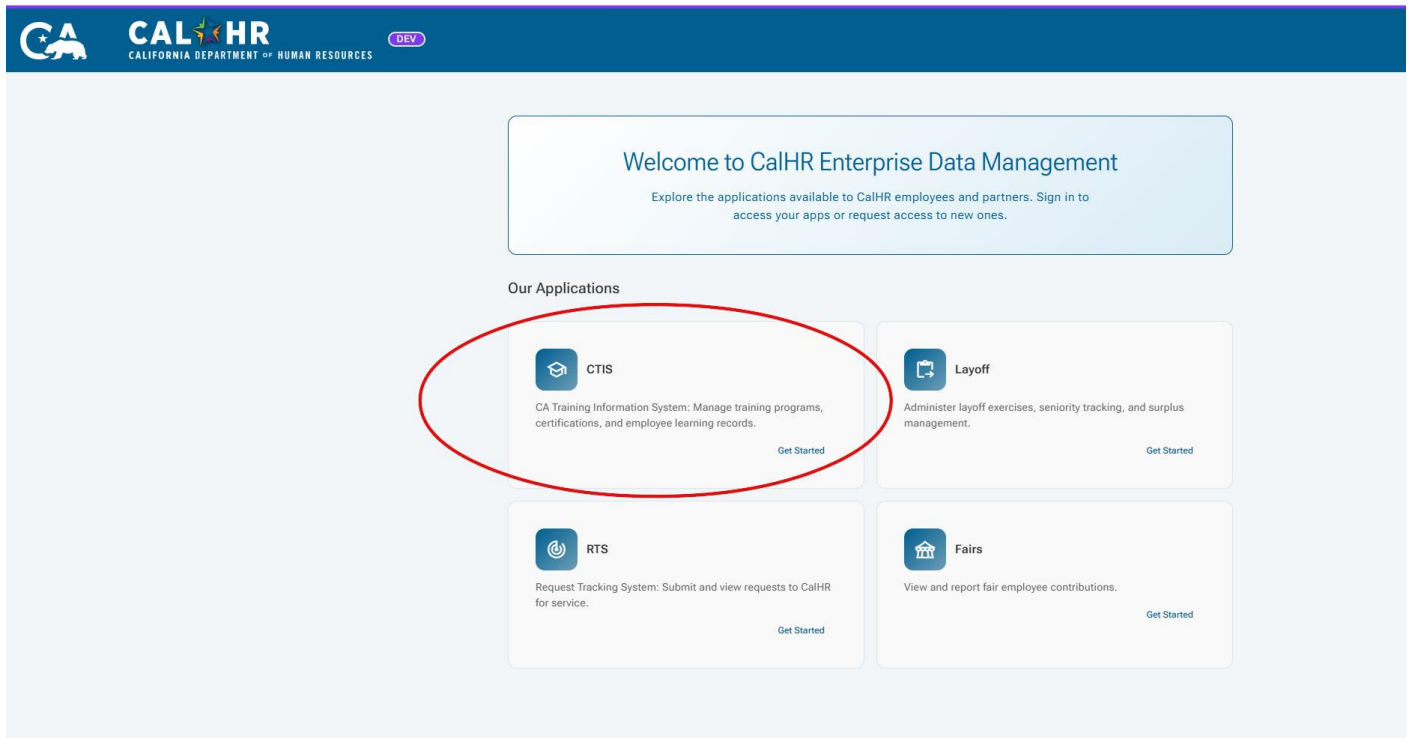
# CalLearns Training Information System (CTIS) User Guide

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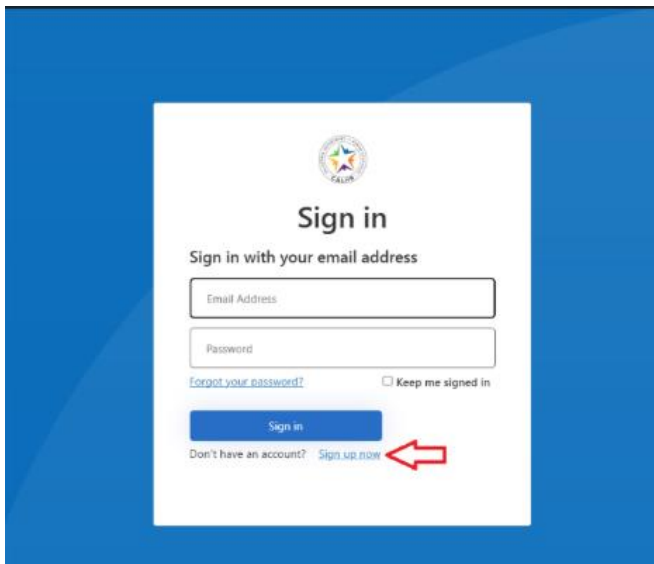
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# CTIS Registration

Visit [CTIS Live Environment \(Production Environment\)](#) to register. Click on **Get Started** in the CTIS tile.




1. Click on *Sign Up Now*



2. Fill out the email address field. Click on the **Send verification code** button.

Cancel



Send verification code

New Password

Confirm New Password

Department

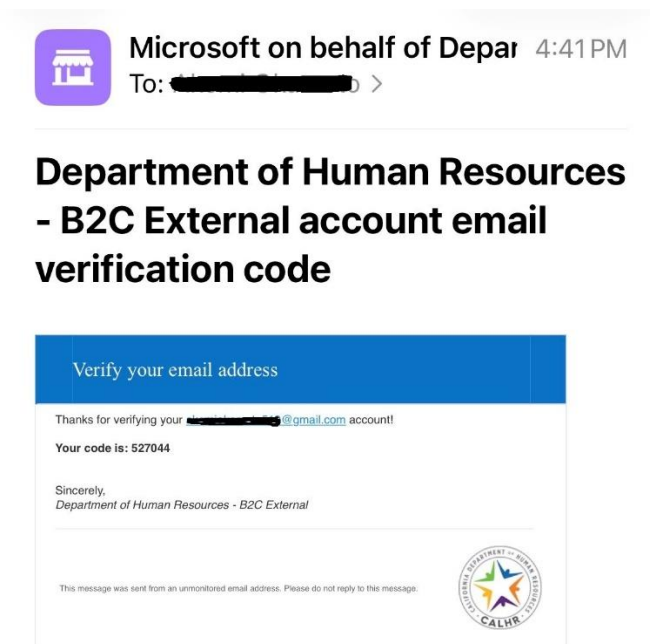
Display Name

First Name

Last Name


Create

3. You will be asked to check your inbox and retrieve a verification code to enter.



4. Once you've entered the code, you will continue to create and confirm your password.

< Cancel



Verification code has been sent to your inbox. Please copy it to the input box below.

[Redacted]@gmail.com

527044

✓ Verify code Send new code

New Password

Confirm New Password

Department

Display Name


First Name

Last Name

Create

5. Create your password, enter Department, Display Name, First Name, Last Name and click **Create**.

< Cancel



E-mail address verified. You can continue now.

[Redacted]@gmail.com

Change e-mail

.....

.....

Department

Display Name

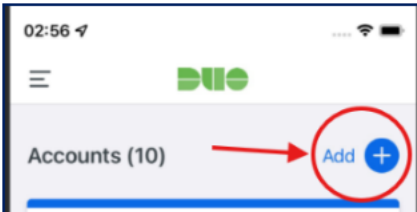
First Name

Last Name

Create

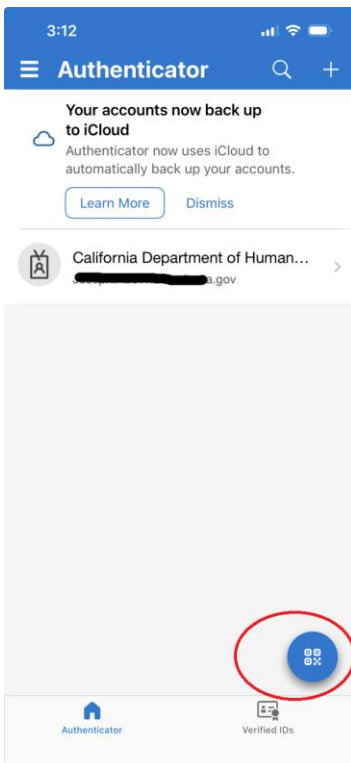
6. If you're already using an authenticator app, you may use the same one for CTIS. If you do not have an existing app on your device, download any authenticator app of your choice.
7. **For the Duo app**, open the authenticator app on your mobile device, click the add button at the top **and then** scan the QR code displayed on your laptop to authenticate your user access. Hit Save

- Duo authenticator

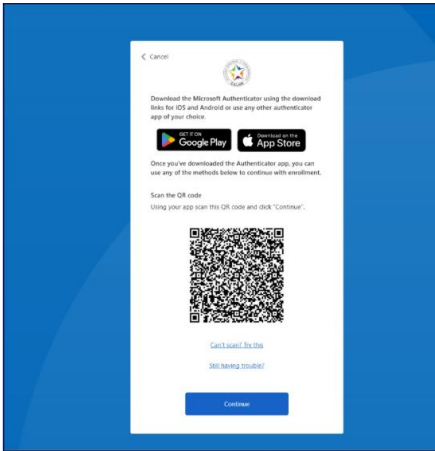


8. Click *continue* to submit your user registration request.
9. **For the Microsoft Authenticator app**, open the app on your mobile device, click on the small barcode icon in the lower right corner, **and then** scan the QR code displayed on your laptop to authenticate your user access.

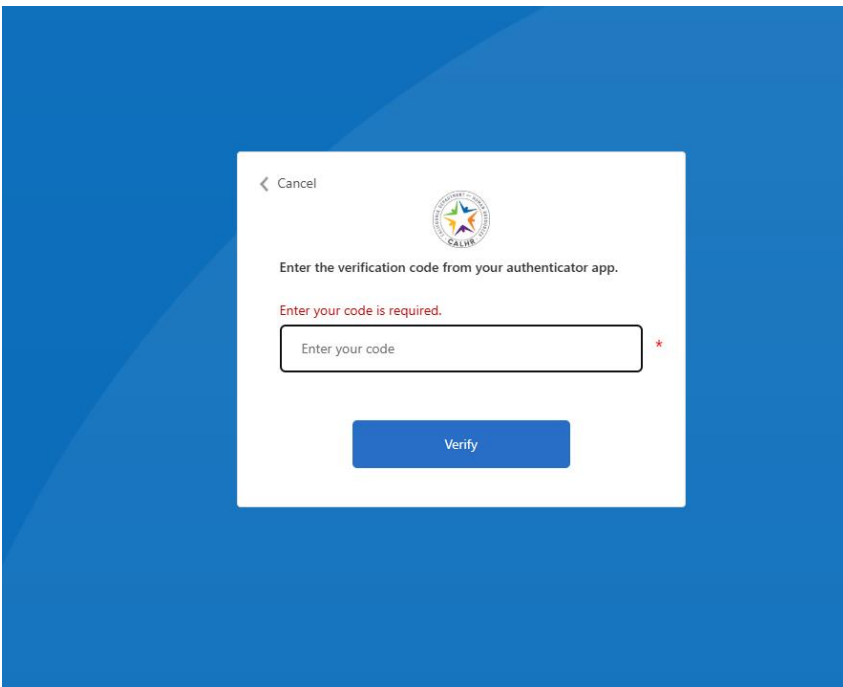
- MS authenticator



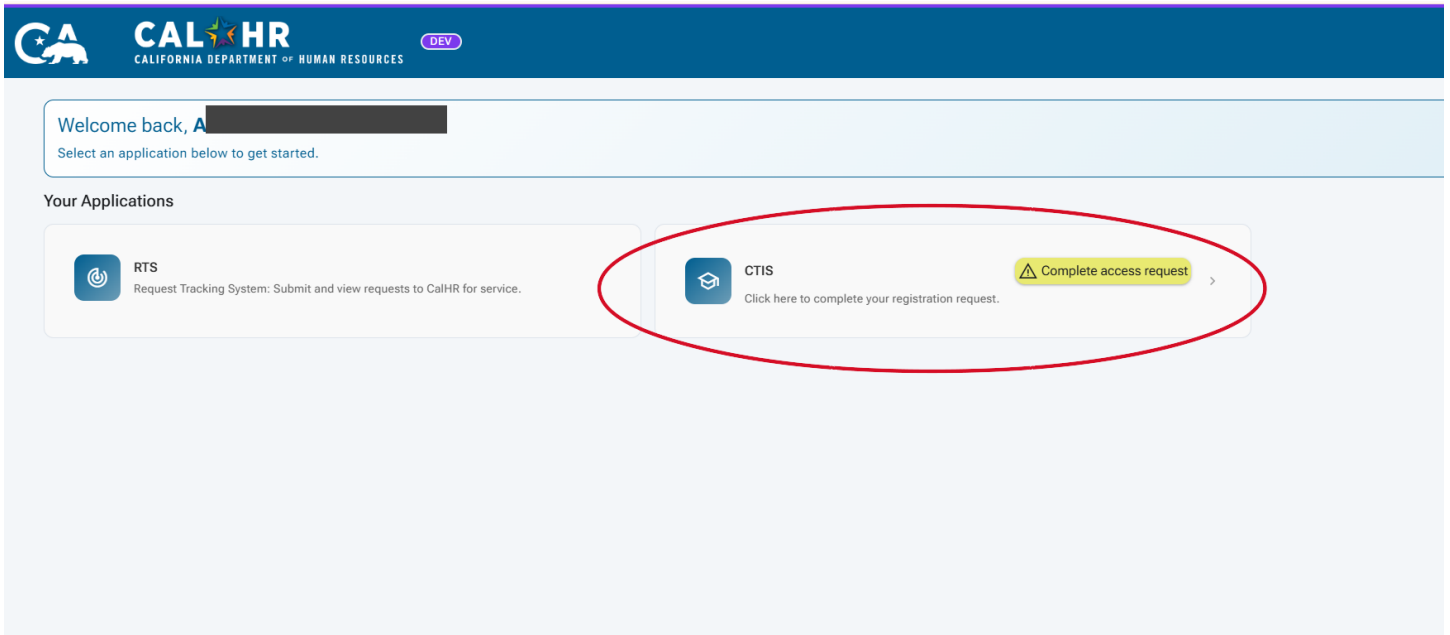
- Scan the QR code displayed on your laptop to authenticate your user access.



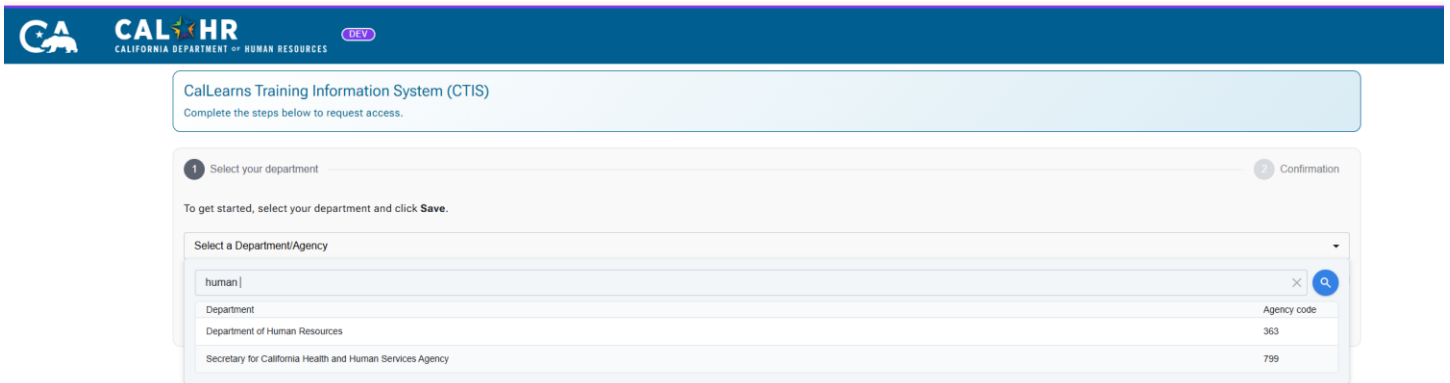
## 10. Enter your verification code from the authenticator app




11. System will then forward you to the CTIS Welcome Back page. Click on *CTIS Complete Access Request*.



12. Search and choose your department from the dropdown feature.




13. You will receive a message stating that the account is under review and could take up to 48 hours for approval. Once approved, you'll receive a confirmation email.

 **CAL HR**  
CALIFORNIA DEPARTMENT OF HUMAN RESOURCES DEV

CalLeans Training Information System (CTIS)  
Complete the steps below to request access.

1 Select your department 2 Confirmation



 Your request for access to CalLeans Training Information System (CTIS) has been saved successfully!

Our team will review your request and get back to you as soon as possible with next steps.

[< Previous](#) [Next >](#)


# Upload Data

Visit the [CTIS Sandbox Environment \(QA Environment\)](#) to upload training data.


 **CAL HR**  
CALIFORNIA DEPARTMENT OF HUMAN RESOURCES QA 

Welcome back, **A**    
Select an application below to get started.

Your Applications



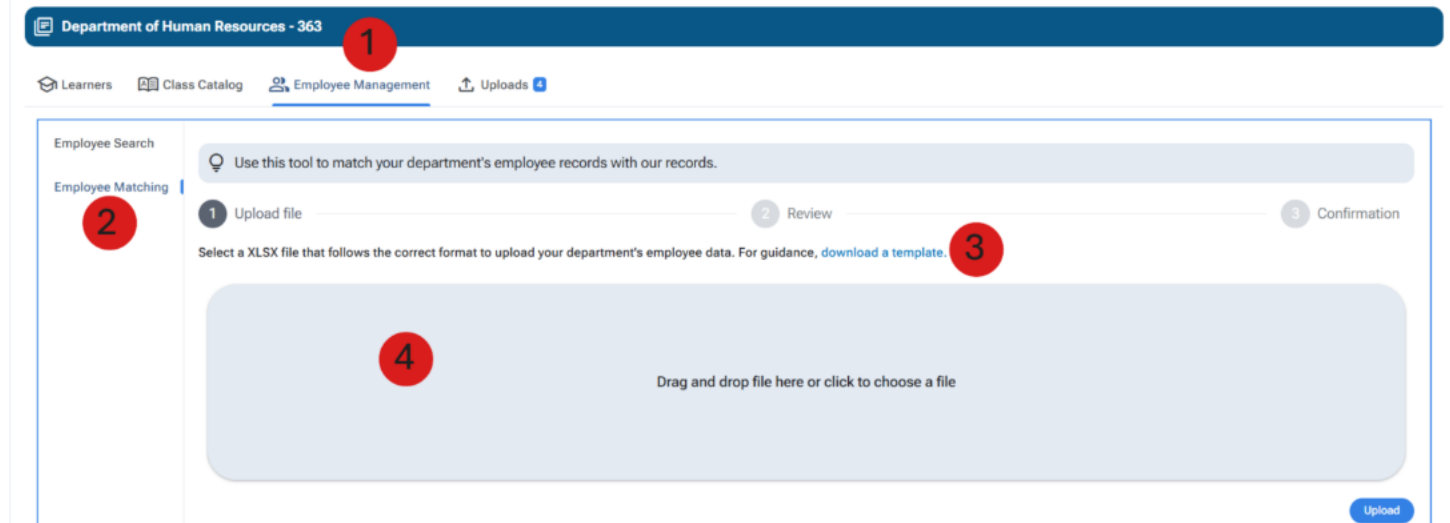
**CTIS**  
Manage training programs, certifications, and employee learning records. >



**RTS**  
Submit and view requests to CalHR for service. >

## Step 1- Learner Identification Upload

Departments that do not store the employee’s official SCO UEID in their local Learning Management System (LMS) must complete the Employee Identification Upload.



1. Select **Employee Management**.
2. Select **Employee Matching**.
3. Download the blank **Employee Identification Template** and complete the following fields:
  - **Department Learner ID\***
  - **Legal First Name**
  - **Legal Last Name**
  - **Legal Middle Name (optional)**
  - **Suffix (optional)**
  - Leave the **UEID** column blank
4. Upload the completed Learner Identification Template.

\* **Department Learner ID** is the identifier used in your department's local LMS. CTIS uses this identifier to create a unique learner record.

**Note:** If your department stores the employee's SCO UEID and can include the UEID in training record uploads, you may skip the Employee Identification upload and proceed directly to **Training Records Upload** using the UEID.

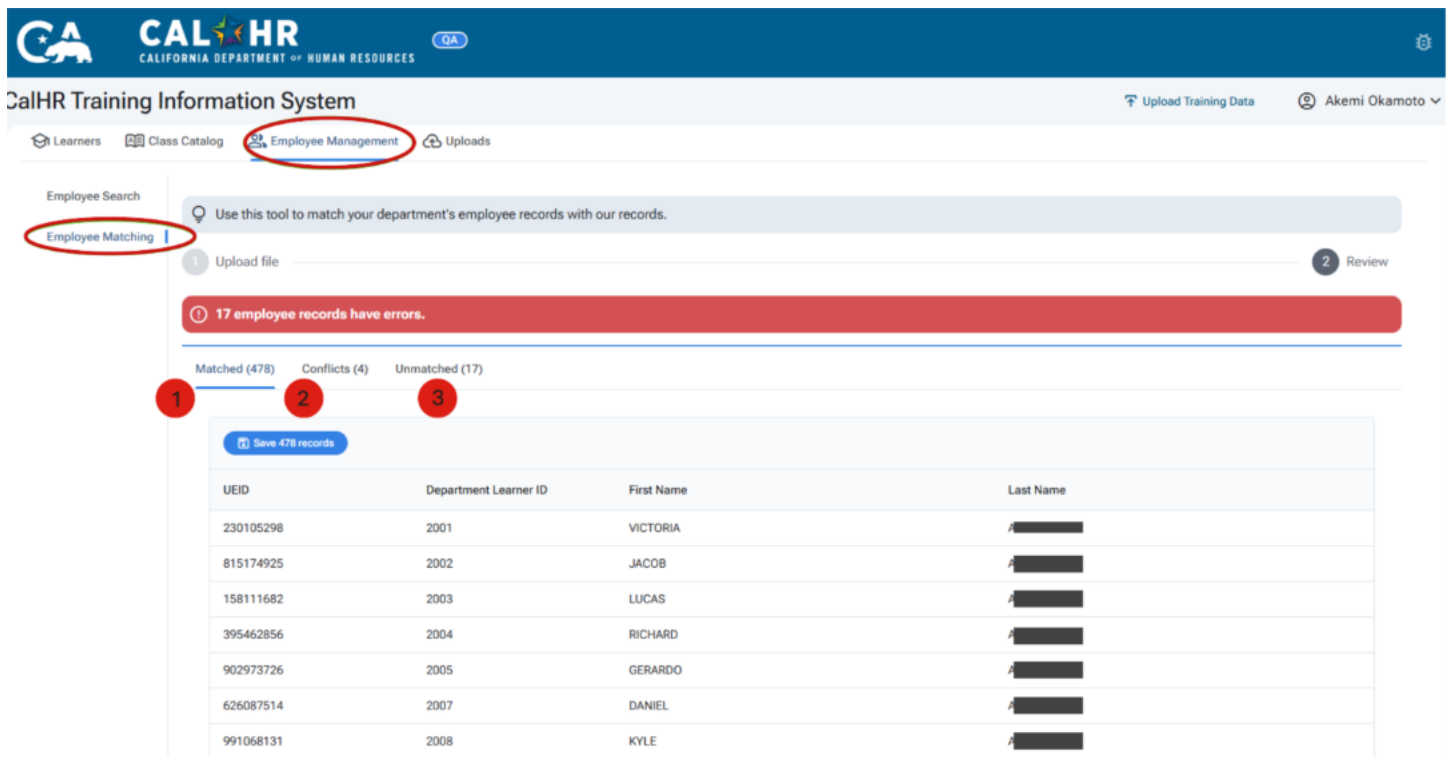
## Step 2- Learner Identification Results: Matched, Conflicts, Unmatched

After uploading the Employee Identification Template, CTIS may display up to three result categories. These categories help you review matched records, resolve conflicts, and troubleshoot unmatched employees.

### 1. Matched

Displays employees who were successfully matched to their UEID.

- Review the matched records
- Select **Save Records** to confirm and store the matched learner records.



Employee Search

Use this tool to match your department's employee records with our records.

1 Upload file 2 Review

17 employee records have errors.

Matched (478) Conflicts (4) Unmatched (17)

1 2 3

Save 478 records

UEID	Department Learner ID	First Name	Last Name
230105298	2001	VICTORIA	A [REDACTED]
815174925	2002	JACOB	A [REDACTED]
158111682	2003	LUCAS	A [REDACTED]
395462856	2004	RICHARD	A [REDACTED]
902973726	2005	GERARDO	A [REDACTED]
626087514	2007	DANIEL	A [REDACTED]
991068131	2008	KYLE	A [REDACTED]

### 2. Conflicts

Displays employees where multiple potential matches were identified (for example, employees with the same name).

- Use the dropdown menu to select the correct employee.
- Verify the match using the employee's **UEID** and/or **Position Number**.
- After resolving all conflicts, select **Save Records**.

Employee Search

Employee Matching

Use this tool to match your department's employee records with our records.

1 Upload file 2 Review

**17 employee records have errors.**

Matched (475) **Conflicts (4)** Unmatched (17)

UEID	Department Learner ID	First Name	Last Name
Select learner	2191	DOUGLAS	██████
Search...		JEFFREY	██████
UEID	Position Number	MICHAEL	██████
787042969	549-740-1087-001	JADEN	██████
838465177	549-689-6768-002		

### 3. Unmatched

- Select **Download Error Report** to review details of the unmatched records.
- Review and correct errors in the spreadsheet. It is not necessary to delete the Error Message column before reuploading the file.
- If the error indicates the employee was not found, search for them in **Employee Management** under **Employee Search**. If they appear, copy their UEID into the template. If not, they may not yet be visible due to access limitations (e.g., new or transferred employees may take 6–10 weeks to appear after SCO updates).

Employee Search

Employee Matching

1 Upload file 2 Review

**17 employee records have errors.**

Matched (478) Conflicts (4) **Unmatched (17)**

Download error report

	Department Learner ID	First Name	Last Name
1 Error(s)	2011	JESUS	[REDACTED]
1 Error(s)	2039	BREEZY	[REDACTED]
1 Error(s)	2048	ELIJAH	[REDACTED]
1 Error(s)	2088	RUSSELL	[REDACTED]
1 Error(s)	2104	MICHELLE	[REDACTED]
1 Error(s)	2154	VANESSA	[REDACTED]

## Step 3- Training Records Upload

1. Navigate to the top right corner and select **Upload Training Record**

Department of Parks and Recreation - 549

Search Training Data

First Name Last Name Class Name

UEID Completion Start Date Completion End Date 05/01/2026

**Upload Training Data**

2. Download the training records template.

Back to overview » **Upload Training Data**

1 Select file to upload 2 Review

Select a XLSX file that follows the correct format to upload employee training data. For guidance, **download a template.**

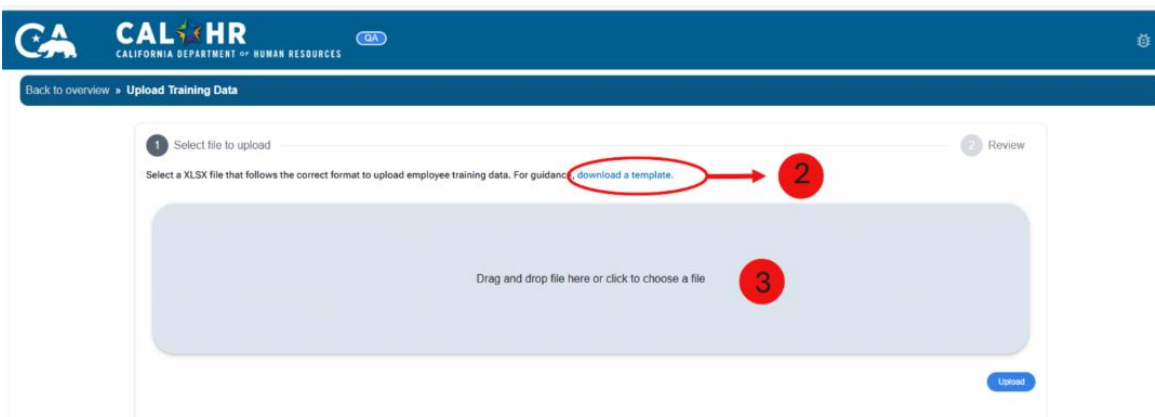
Drag and drop file here or click to choose a file

Upload

- a. Refer to the **Training Data Fields Guide** below (or the PDF version on the CTIS website) when completing each field in the template.
- b. If your department does not currently track **Department Learner ID** or **Class Number**, your department must create a unique identifier for each learner and each class/course. The same identifier must be used consistently each time training data is submitted.
- c. **Class Descriptions** may range from a single sentence to several sentences, depending on the level of detail needed to describe the training.

Field	Required/Optional	Description	Format	Comments
Department Learner ID	Required	LMS issued unique identifier in your dept's system	<=100	If your department does not use LMS Learner ID's, please issue a unique identifier for each employee.
Legal First Name	Required		<=50	
Legal Last Name	Required		<=50	
Legal Middle Name	Optional		<=50	If your dept collects, this can improve the employee matching process to UEID
Suffix	Optional		<=50	If your dept collects, this can improve the employee matching process to UEID
Class Number	Required	Unique number or alphanumeric number to identify training	<=100	If your department does not use unique class identifiers here, please issue one for each.
Class Name (course title)	Required	Training Class Name	<=150	
Class Description	Required	Class long description	Unlimited	This may range from a single sentence to several sentences, depending on the level of detail needed to describe the training.
Is State Mandated	Optional		TRUE/FALSE	Will accept blank when information is not tracked
Is Department Mandated	Optional		TRUE/FALSE	Will accept blank when information is not tracked
Is Part of IDP	Optional		TRUE/FALSE	Will accept blank when information is not tracked
Is Job Mandated	Optional		TRUE/FALSE	Will accept blank when information is not tracked
Is Job Related	Optional		TRUE/FALSE	Will accept blank when information is not tracked
Is Upward Mobility	Optional		TRUE/FALSE	Will accept blank when information is not tracked
Is Part of Succession Plan	Optional		TRUE/FALSE	Will accept blank when information is not tracked
Is Career Related	Optional		TRUE/FALSE	Will accept blank when information is not tracked
Training Provider	Required	Department who created the training. ie. Civil Rights, LinkedIn Learning, Udemy	<=100	
Delivery Method	Required	webinar, online, in-person, lunch and learn, etc	Text	Will accept all values as text field
Enrollment Date	Required		xx/xx/xxxx	
Date Completed	Required		xx/xx/xxxx	

3. Upload the completed Training Records Sheet.



## Step 4- Training Records Status: Ready for Submission, Errors , Conflicts

After uploading the **Training Records Sheet**, review the status of the uploaded records. Records will display one or both of the following statuses:

- Ready for Submission
- Errors
- Conflicts

### 1. Ready for Submission

Review these records and **Save**.

### 2. Review Error Status

If errors are present in the training data (for example, missing required fields), select **Errors** to view the number of errors associated with each record.

[Back to overview](#) » [Upload Training Data](#)

The screenshot shows a user interface for reviewing training records. At the top, there are two steps: '1 Select file to upload' and '2 Review'. A red banner indicates '3 record(s) in your upload have errors and will be excluded from submission.' Below this, there are two tabs: 'Ready for submission (169)' and 'Errors (3)'. The 'Errors (3)' tab is selected, and a red circle with the number '2' is next to it. A 'Download Error Report' button is visible. Below the button is a table with columns: UEID, First Name, Last Name, Class Name, and Date Completed. Three rows are shown, each with a red circle and the number of errors: 2 Error(s), 1 Error(s), and 1 Error(s).

UEID	First Name	Last Name	Class Name	Date Completed
697030849	JOSEPH	[REDACTED]	American Red Cross ...	5/18/2021
697030849	JOSEPH	[REDACTED]	Implicit Bias Awarene...	3/1/2021
697030849	JOSEPH	[REDACTED]	IS-100C: Introduction ...	5/14/2021

### 3. Download and Review the Error Report

Select **Download Error Report** to review detailed information about each error in CSV format.

UEID	DepartmentLearnerId	FirstName	LastName	ClassNumr	ClassNamr	ClassDesc	IsStateMa	IsDepartn	IsPartOfId	IsJobMan	IsJobRela	IsUpward	IsPartOfIs	IsCareerR	TrainingPi	DeliveryM	Enrollmer	DateComp	StatusOfC	IsValid	ErrorMessage
6970308495001	JOSEPH	[REDACTED]	[REDACTED]	American	CTIS Testing for Pilot2		FALSE	FALSE	FALSE	FALSE	TRUE	TRUE	Social Ser	1/1/2021	5/18/2021	completed	FALSE	ClassNumber missing., DeliveryMethod missing.			
6970308495001	JOSEPH	[REDACTED]	[REDACTED]	Implicit Bi	CTIS Testing for Pilot2		FALSE	FALSE	FALSE	FALSE	TRUE	TRUE	Social Ser	Webinar	1/9/2021	3/1/2021	completed	FALSE	ClassNumber missing.		
6970308495001	JOSEPH	[REDACTED]	[REDACTED]	DT-Class	IS-100C: Ir		FALSE	FALSE	FALSE	FALSE	TRUE	TRUE	Social Ser	Web Base	1/13/2021	5/14/2021	completed	FALSE	ClassDescription missing.		

### 4. Correct Errors and Reupload

- Review and correct errors directly within the Error Report spreadsheet.
- It is **not** necessary to delete the *Is Valid* and *Error Message* columns before reuploading the corrected file.
- Reupload the updated Error Report sheet to complete the submission process.

## Search Learner Training Data

1. Enter first name or last name, or class name, or completion date start or completion date end.

## 2. Click **Search**.

Department of Parks and Recreation - 549

Search Training Data

First Name: Jesus

Last Name: A [REDACTED]

Class Name

UEID

Completion Start Date

Completion End Date: 03/12/2026

Reset Search

1 learners found Download Results

UEID	Last Name	First Name
[REDACTED]	A [REDACTED]	JESUS

3. You can click on the learner's UEID and a side window will open listing all training courses for that individual.

4. Click **Download Results** to export a CSV file.

Department of Parks and Recreation - 549

Search Training Data

First Name: Jesus

Last Name: A [REDACTED]

UEID

1 learners found Download Results

UEID

Last Name

JESUS [REDACTED]

Completed Classes

Class Number	Class Name	Delivery Method	Completion Date
DT-ClassNum-5726	Cal/OSHA COVID-19 Prevention 2023	Blended	2/22/2024
DT-ClassNum-5933	Privacy and Security Awareness Trainings	Web Based Training	1/9/2024
DT-ClassNum-5496	Device Tampering Training	Web Based Training	10/31/2023
DT-ClassNum-3253	Concessions: DPR 531: Concessions Performanc...	Web Based Training	4/11/2023

## Search Class Catalog

Department of Parks and Recreation - 549

Class Catalog

Search Classes

Class Number

Class Name

Reset Search

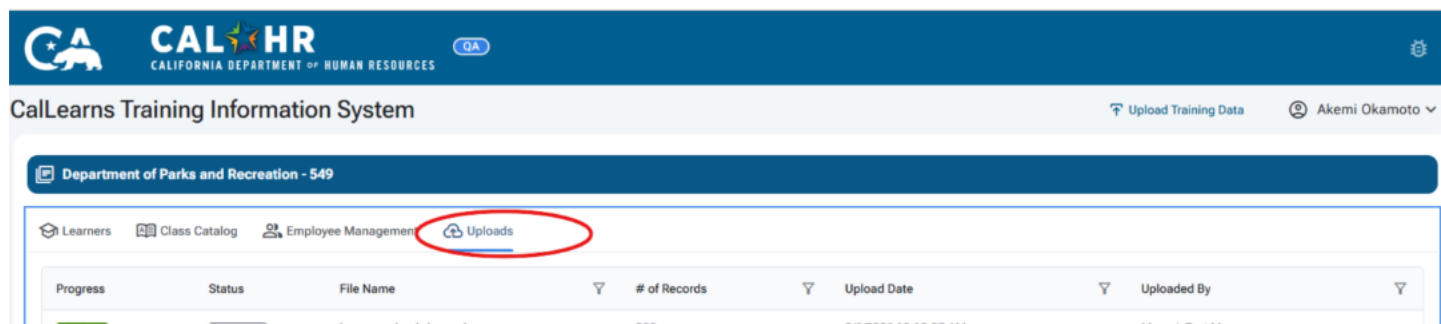
1. Enter a **Class Number** or **Class Name**.

2. Click **Search**.

3. You can filter your data by clicking on the filter on the left of each data field name.

4. Click **Download Results** to export your search results to CSV file.

# View Data Upload History



The screenshot shows the CalLearns Training Information System interface. At the top, there is a blue header with the CAL HR logo (California Department of Human Resources) and a 'QA' badge. Below the header, the system name 'CalLearns Training Information System' is displayed, along with a user profile for 'Akemi Okamoto' and a 'Upload Training Data' button. A secondary blue bar indicates the user is in the 'Department of Parks and Recreation - 549'. A navigation menu includes 'Learners', 'Class Catalog', 'Employee Management', and 'Uploads', with the 'Uploads' option circled in red. Below the menu is a table with columns: Progress, Status, File Name, # of Records, Upload Date, and Uploaded By. The table contains one row of data with a green progress bar, a status icon, a file name, the number '000', a date 'SEP 02 10:10:57 AM', and a user name 'M...Test M...'. Filter icons are visible to the left of the 'File Name', '# of Records', 'Upload Date', and 'Uploaded By' columns.

1. To view your department/agency's data upload history click on **Uploads**.
2. You can filter on **Number of Records**, **Upload Date**, and **Uploaded By** by clicking on the filter on the left of each data field name.

## Access Limitations for Department Training Records

Departments can access training records only for **active employees assigned to their department**. Training records for former employees or employees assigned to other departments will not be visible. For employees newly joining your department, there may be a delay of approximately **6–10 weeks** before their prior training records become available. This delay occurs because the **State Controller's Office (SCO)** must first update the employee's department assignment. Training records will become visible once the SCO update is completed.