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Arizona Association of Health Plans

How to create a new user that needs a transcript transfer

For new users that have completions from a previous Relias account with another provider please follow the instructions below for creating their account and requesting their transcript to be transferred.

Create New User - Inactive

1. Log into Relias
2. Ensure that you are logged in as “Administrator”
3. Click on “Users” then “User List” on the left of your screen.
4. Click on the “+ Add Users” icon to create a new user profile.
5. Create the new user, being sure to fill out all the enterprise required fields (as well as any others):
 - a. Job Roles (Job Titles)
 - b. Facility Types (Departments)
 - c. Plan (Employment Type)
 - d. Hire Date
6. Under the Settings section of the user profile, set the new user to an Account Status of Inactive.

Settings

Account Status

Inactive

Hire Date

Termination Date

7. Click Save
 - a. Account will not be active and user will not be able to log in.

Submit a Ticket – Request Transcript Transfer

1. [Submit a Ticket](#) to request a transcript transfer to have the previous completions transferred from the old provider account to the new account in your site. Information to include:
 - a. User's First and Last Name
 - b. User's previous Provider Agency Name and previous Relias username (login)
 - c. User new Provider Name and new username

Activate User

This step to be completed once you have received notification from Relias Support that the transcript transfer has been completed.

1. Following the notification from Relias Support, Activate User
 - a. Go to User Profile
 - b. Scroll to settings section
 - c. Change the Account Status to Active.
 - d. Click Save

Settings

Account Status

Active

Hire Date

Termination Date

Account is now Active. User will automatically be enrolled in Training Plans & Courses per the site set up. Previous completions will count towards current enrollment (s) if they meet the requirements set up in the Training Plans.

Should you require additional support, please contact Relias Support at 1.800.381.2321.