RELIAS – SKILLS CHECKLIST OVERVIEW

Overview of Skills Checklists

In the Relias Platform, only an Administrator or Instructor can create, edit, or clone a Skills Checklist. Administrators, Instructors, and Enrollment Management Supervisors have the ability to enroll Learners into a Skills Checklist. However, only Observers and Data Entry users can record observations for this module.

The checklist creator chooses Approved Observers for each individual checklist, and only Approved Observers may record observations for those checklists. The Observer must check an attestation statement when recording observations for Learners, signifying that they did indeed observe the user performing the skills checklist tasks.

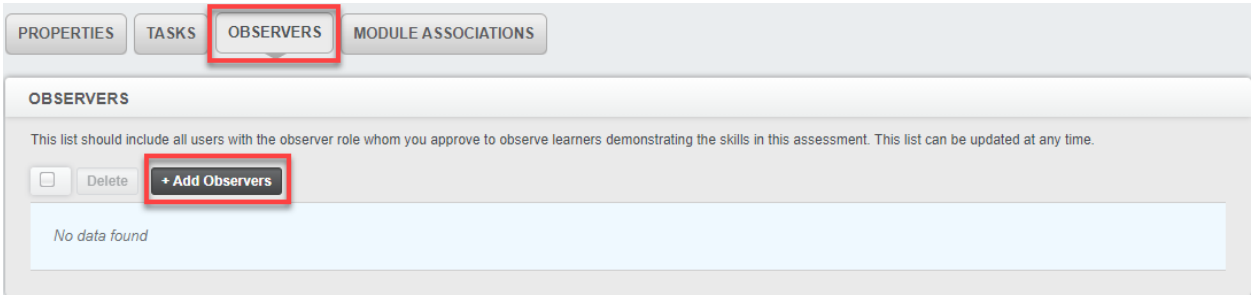
Users with Data Entry permissions have access to record observations for all Skills Checklists. When recording Skills Checklists, the Data Entry user must select the Observer who observed the learner(s) performing the checklist tasks, and also must check an attestation statement signifying that they are recording observations for an Approved Observer. It is common that Data Entry users work in an administrative role and help file paperwork.

Adding Approved Observers

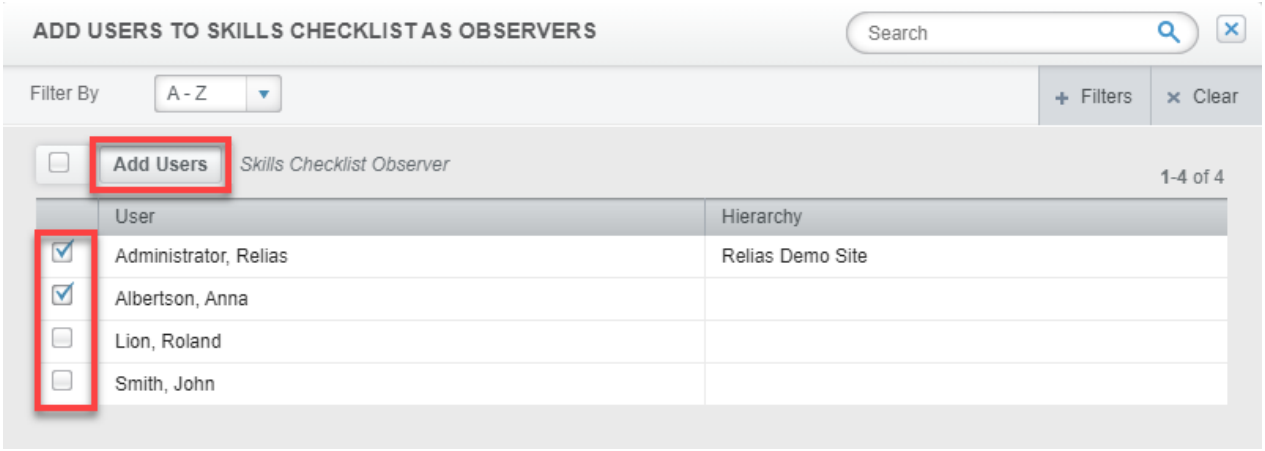
After all of your tasks have been added to the checklist, click on the Observers tab in the Skills Checklist module. This will allow you to add anyone with the Observer role as an Observer to this checklist.

This is always a two-step process - the User must have the Observer role (see* Users - Permissions and Job Roles *for more information) and the user then must be added as an observer to that particular Skills Checklist

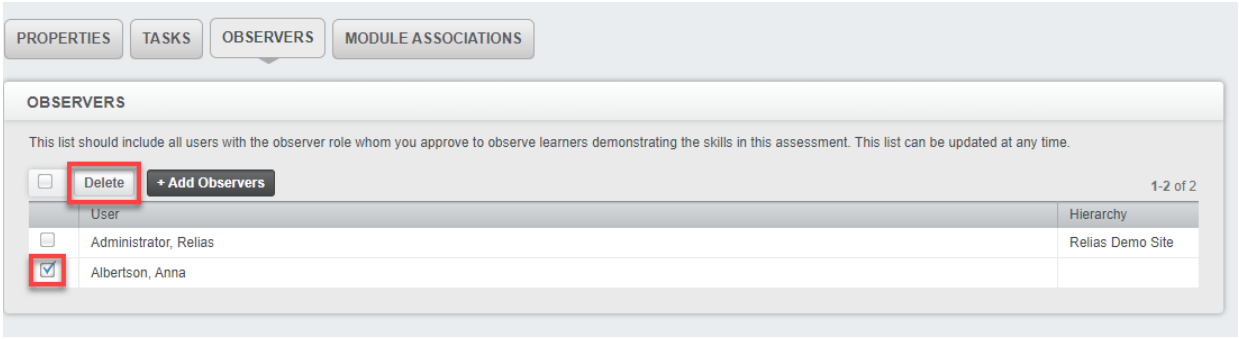
Click the + Add Observers button.



This will provide a list of all of the users within your organization who have the Observer role. Select the Observer(s) you wish to assign to this checklist and click Add Users.

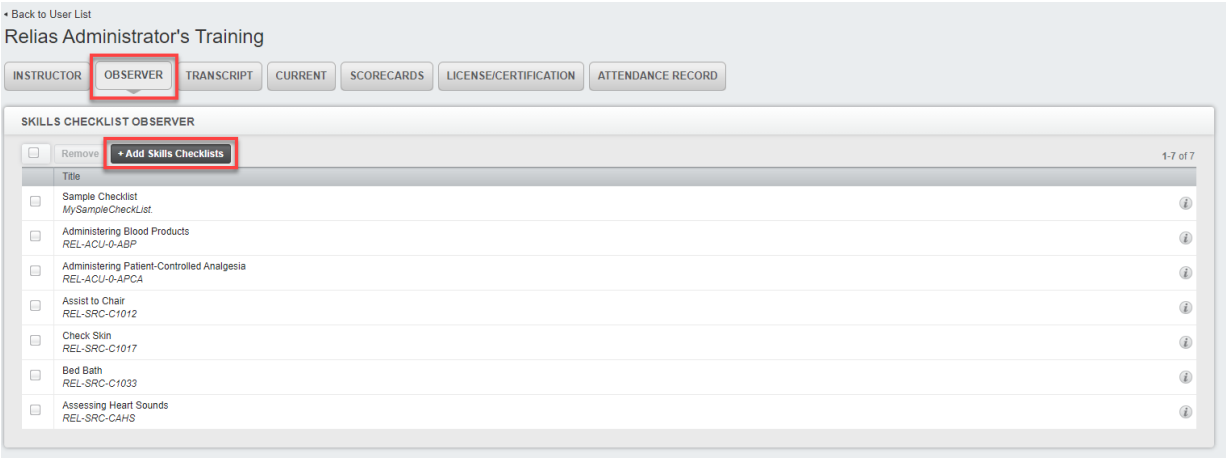


If you need to delete an Observer from a checklist, the Delete button is available on the list of Approved Observers.



To Add Skills Checklists in Bulk to an Observer:

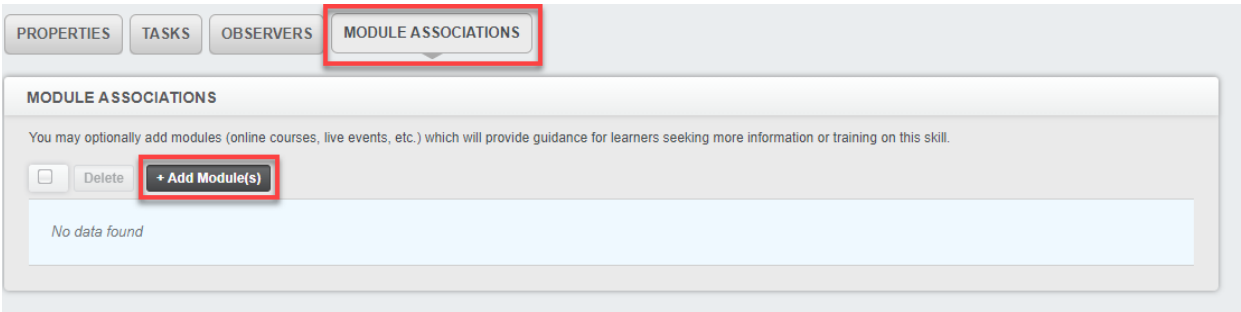
Look up the user under the Users tab > Select the bluebook symbol to the left of the User's name > Select Observer and then +Add Skills Checklist



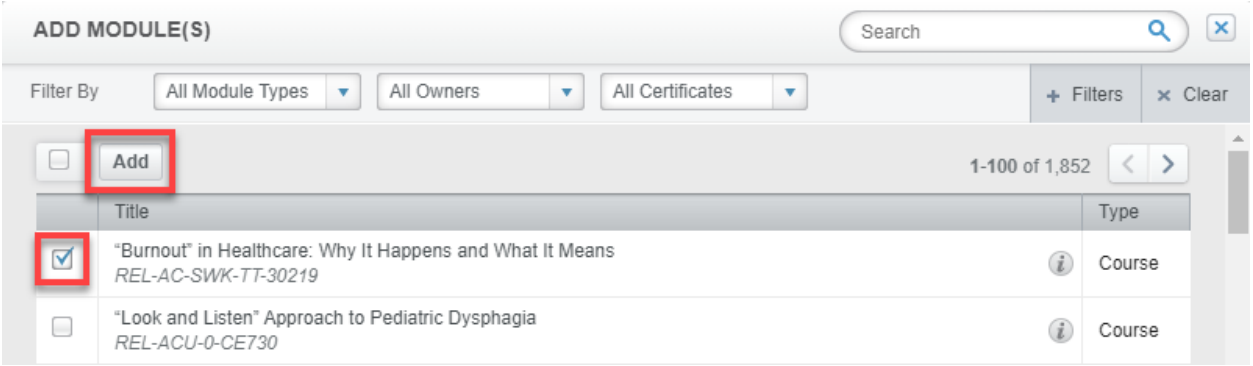
Adding Module Associations

If you wish to add Module Associations to your Skills Checklist, click the Module Associations tab.

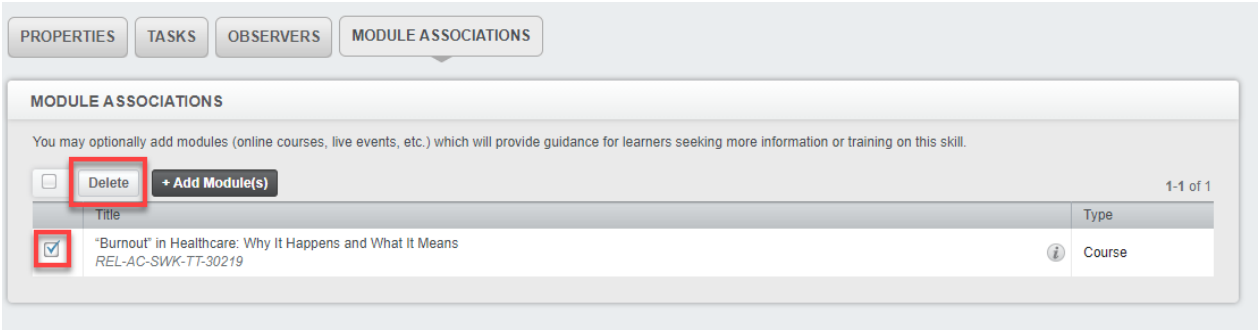
- Associated modules should provide guidance for Learners seeking more information or training on the tested skills. Associated modules are not required of the Learner to complete; they are only suggested modules.



Click the + Add Modules button to search for, and add, modules to this checklist.



Associated modules will be listed under the Module Associations tab and can be deleted using the Delete button if necessary.

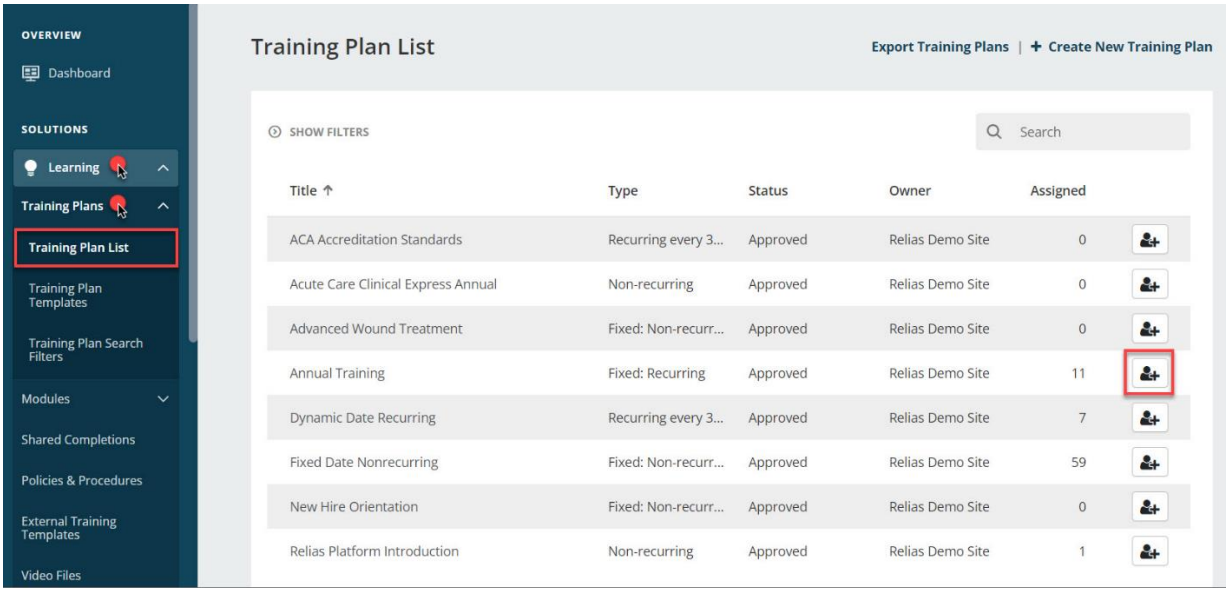


Enrolling Learners into a Skills Checklist

Learners may be enrolled into a Skills Checklist ad hoc, through a curriculum, or as an elective (if allowed). The process of enrolling Learners into Skills Checklists is the same as enrolling users into Courses and Events. For more information on enrollment, please view Manually Enrolling Learners in Training Plans and Enrolling Learners with Auto Enrollment .

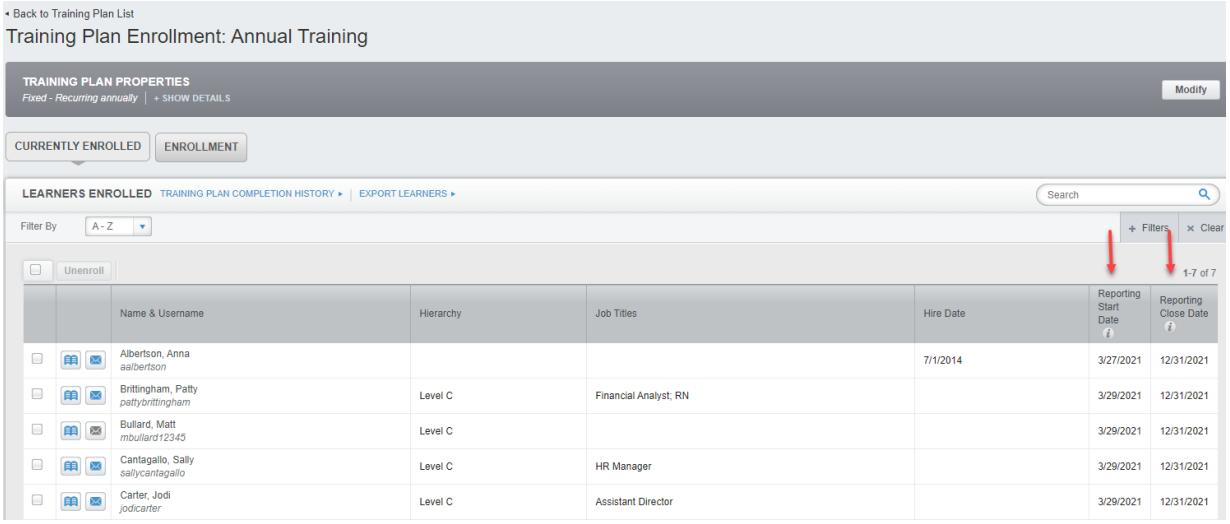
Enrolling Learners in a Training Plan

Before accessing the training plan enrollment screen, you will need to choose the training plan that will be used to enroll the Learners. You can access the enrollment for a training plan by selecting the enrollment button next to the training plan title.

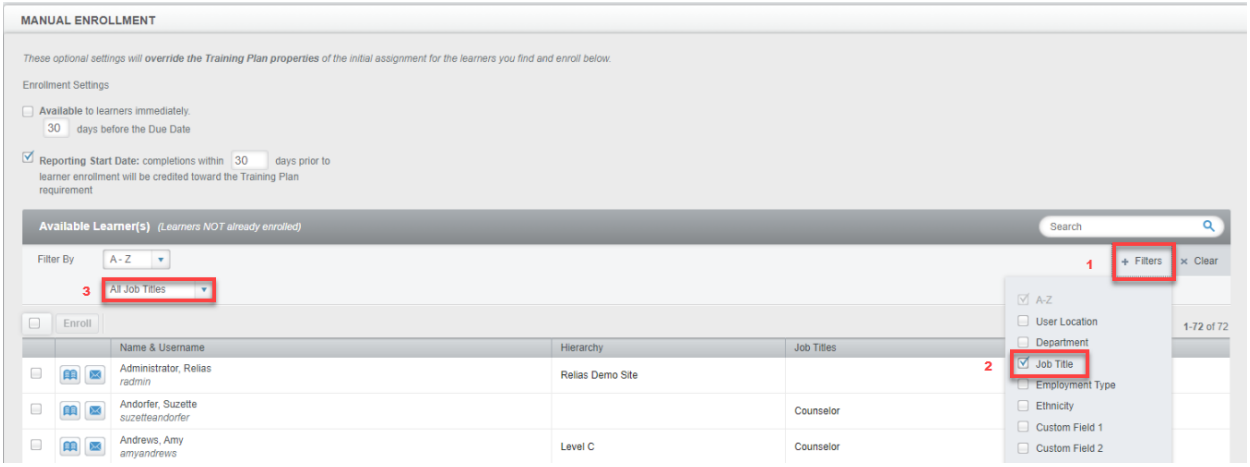


At the top of the screen, you will see a + Show Details link. This link will show you an overview of the settings currently associated with the training plan, and if you determine that you need to make any changes to the training plan properties, you can click on the Modify button to the right.

Beneath the Training Plan Properties section will be the Currently Enrolled section. If Learners are already actively enrolled in the training plan you chose, you will see a list of those Learners on the screen. Notice that each Learner has a defined Reporting Start Date (if it was assigned within the training plan properties). The Reporting Start and End Dates listed will let you know the dates that a module must be completed in order to count toward the training plan requirements as it relates to each Learner.

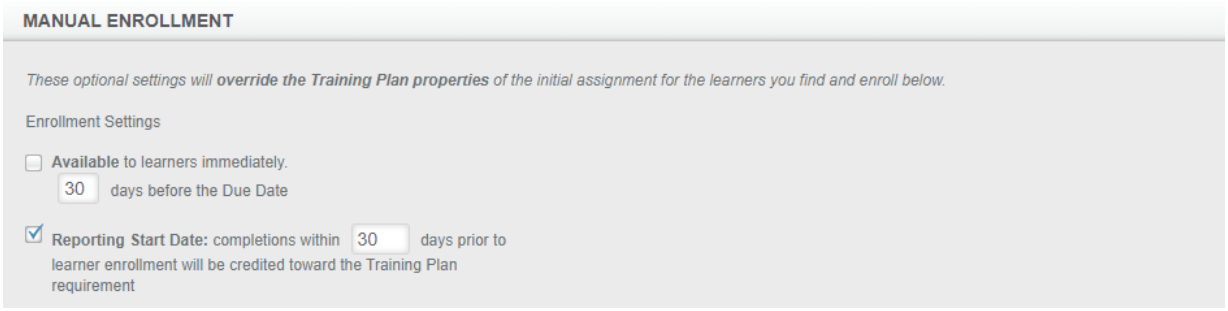


To begin enrolling Learners into the training plan, simply click on the Enrollment tab. On this new page, you can search for the Learners you want to enroll, and set their initial due dates. You can click the + Filters button to narrow down your Learners by user demographic parameters. For example, you could look for all Learners assigned to a specific department who were hired in 2009 or who are in a specific department.



After you have found the Learners you want to enroll, check the boxes next to their names (you can also click the topmost check box to select "All Users" who fit the parameters you have selected).

Once you have selected your Learners, it is important to determine whether you wish to keep the initial due date (as determined by the training plan's properties), or assign a new one. This date will determine when each module within the training plan should be due. This option will not appear if you are using a Fixed- Recurring training plan, as that will have hard due dates determined for each module.



Please note: If a Learner is assigned the same module in multiple training plans, Relias will enroll the Learner with the most aggressive due date and recurrence cycle.

You can either use the same initial due date for all Learners, or use each Learner's hire date as the due date. Please be aware that if you do use hire date for your default, Relias will take into account both the day and year the Learner was hired when setting the initial due dates. It is also important that you have hire dates entered for your Learners if you wish to use this option.

Please note: The system will not allow you to assign a module through a training plan and make it overdue. If a Learner's hire date has long since passed, the training plan will be due 30 days after enrollment for that Learner.

Once you are satisfied that you have chosen the correct Learners and chosen the appropriate Initial Due Date(s), simply click Enroll.

If you would like to automate enrollments for your Training Plans, please see this video tutorial about Automating Profiles.

Manually Unenrolling Learners from a Training Plan

If you need to remove Learners from a training plan, you will need to select the Training Plan from the Training Plan list. Select the enrollment icon as shown above to display the Currently Enrolled tab. Continue by checking your Learner name(s) using the checkbox to the left, and choose the Unenroll button at the top of the list. *The Learner will automatically be removed from all training associated with that training plan*. If the Learner is in enrolled in the module through a different training plan, that instance of the module will remain on their training.

If you are removing a Learner from a module, but they were enrolled into the module through a Training Plan, you must remove them from the entire Training Plan.