

RELIAS – SKILLS CHECKLIST OVERVIEW

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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.

PROPERTYES TASKS **OBSERVERS** MODULE ASSOCIATIONS

OBSERVERS

This list should include all users with the observer role whom you approve to observe learners demonstrating the skills in this assessment. This list can be updated at any time.

Delete **+ Add Observers**

No data found

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.

ADD USERS TO SKILLS CHECKLIST AS OBSERVERS

Search

Filter By A-Z

+ Filters x Clear

Add Users Skills Checklist Observer 1-4 of 4

User	Hierarchy
<input checked="" type="checkbox"/> Administrator, Relias	Relias Demo Site
<input checked="" type="checkbox"/> Albertson, Anna	
<input type="checkbox"/> Lion, Roland	
<input type="checkbox"/> Smith, John	

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

PROPERTYES TASKS **OBSERVERS** MODULE ASSOCIATIONS

OBSERVERS

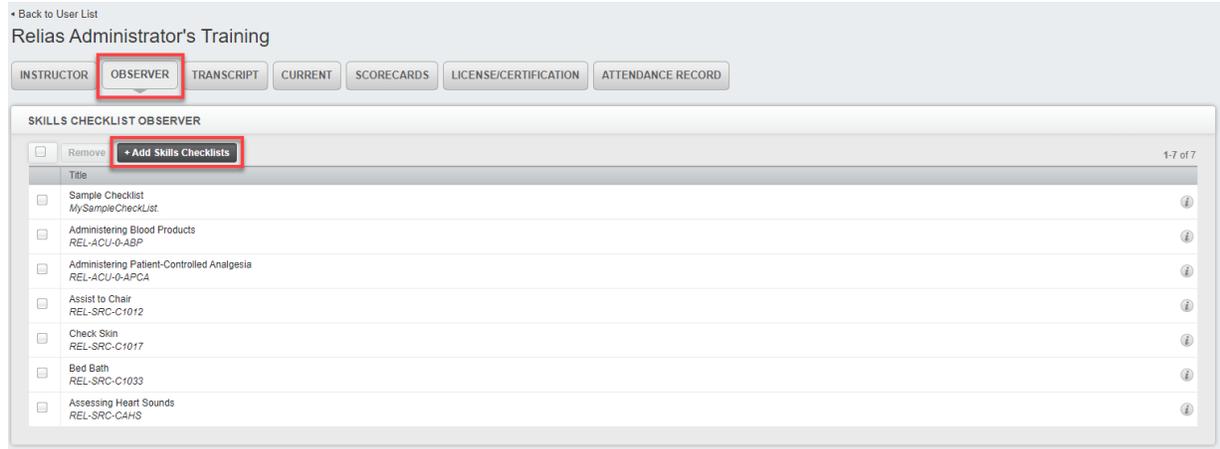
This list should include all users with the observer role whom you approve to observe learners demonstrating the skills in this assessment. This list can be updated at any time.

Delete **+ Add Observers** 1-2 of 2

User	Hierarchy
<input type="checkbox"/> Administrator, Relias	Relias Demo Site
<input checked="" type="checkbox"/> Albertson, Anna	

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

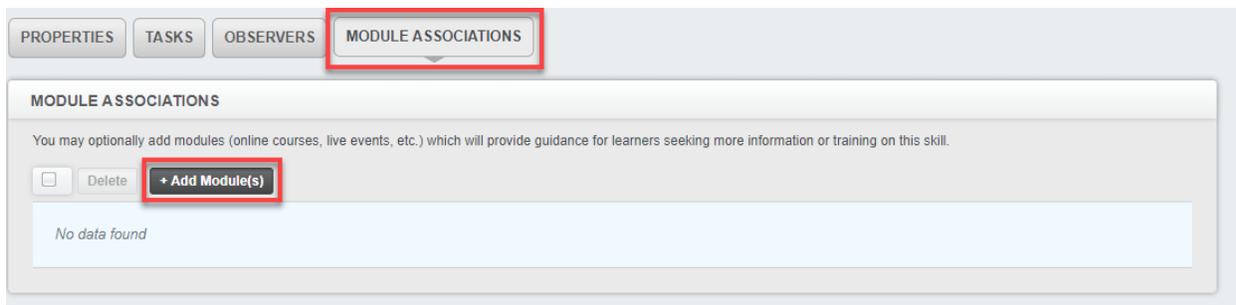


The screenshot shows the 'Relias Administrator's Training' interface. At the top, there is a navigation bar with tabs: INSTRUCTOR, OBSERVER (highlighted with a red box), TRANSCRIPT, CURRENT, SCORECARDS, LICENSE/CERTIFICATION, and ATTENDANCE RECORD. Below the navigation bar is a section titled 'SKILLS CHECKLIST OBSERVER'. This section contains a table with a 'Remove' button and a '+ Add Skills Checklists' button (highlighted with a red box). The table lists several skills checklists with their titles and IDs, each with a bluebook icon to its right. The list includes: Sample Checklist (MySampleCheckList), Administering Blood Products (REL-ACU-0-ABP), Administering Patient-Controlled Analgesia (REL-ACU-0-APCA), Assist to Chair (REL-SRC-C1012), Check Skin (REL-SRC-C1017), Bed Bath (REL-SRC-C1033), and Assessing Heart Sounds (REL-SRC-CAHS). The page number '1-7 of 7' is visible in the top right corner of the table area.

Adding Module Associations

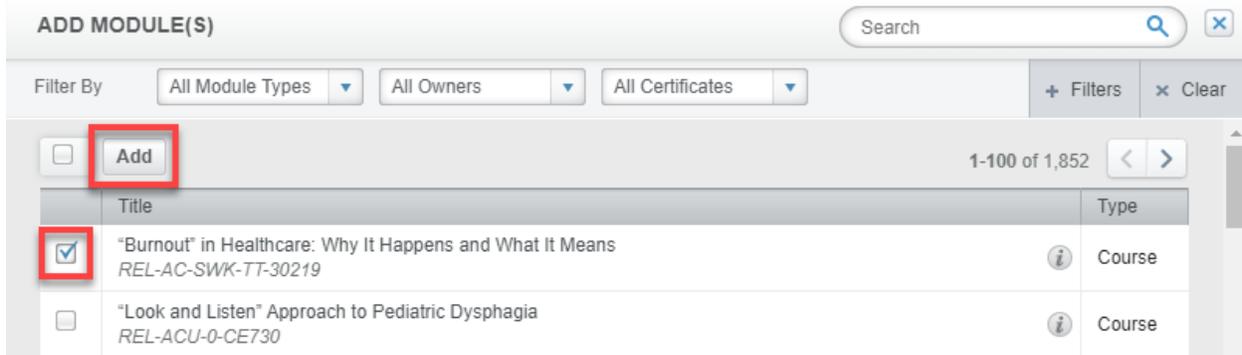
If you wish to add Module Associations to your Skills Checklist, click the Module Associations tab.

- 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.



The screenshot shows the 'MODULE ASSOCIATIONS' tab in the interface. The navigation bar at the top includes tabs: PROPERTIES, TASKS, OBSERVERS, and MODULE ASSOCIATIONS (highlighted with a red box). Below the navigation bar is a section titled 'MODULE ASSOCIATIONS'. This section contains a text box with the instruction: 'You may optionally add modules (online courses, live events, etc.) which will provide guidance for learners seeking more information or training on this skill.' Below the text box are two buttons: 'Delete' and '+ Add Module(s)' (highlighted with a red box). The bottom of the section displays the message 'No data found'.

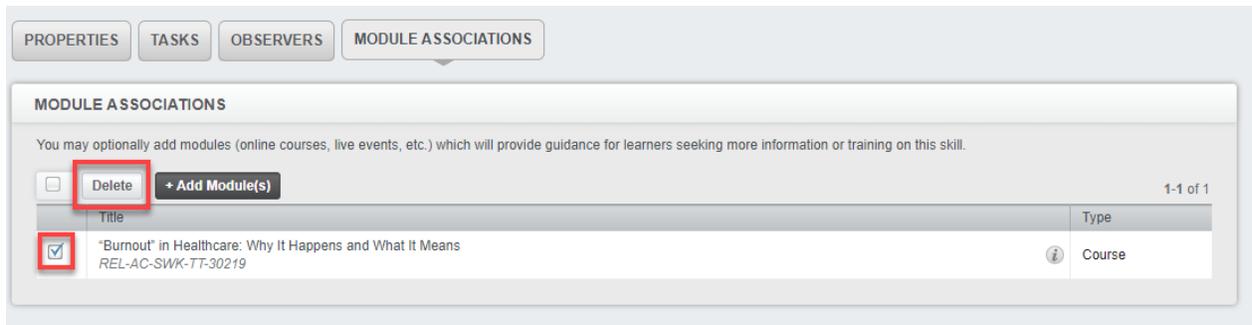
Click the + Add Modules button to search for, and add, modules to this checklist.



The screenshot shows the 'ADD MODULE(S)' interface. At the top, there is a search bar and filter options for 'All Module Types', 'All Owners', and 'All Certificates'. Below the filters, there is a table of modules. The first row is selected, indicated by a checked checkbox in the first column. The 'Add' button is highlighted with a red box. The table has columns for 'Title' and 'Type'. The first row contains the title '"Burnout" in Healthcare: Why It Happens and What It Means' and the type 'Course'. The second row contains the title '"Look and Listen" Approach to Pediatric Dysphagia' and the type 'Course'.

	Title	Type
<input checked="" type="checkbox"/>	"Burnout" in Healthcare: Why It Happens and What It Means REL-AC-SWK-TT-30219	Course
<input type="checkbox"/>	"Look and Listen" Approach to Pediatric Dysphagia REL-ACU-0-CE730	Course

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



The screenshot shows the 'MODULE ASSOCIATIONS' interface. At the top, there are tabs for 'PROPERTIES', 'TASKS', 'OBSERVERS', and 'MODULE ASSOCIATIONS'. Below the tabs, there is a section titled 'MODULE ASSOCIATIONS' with a description: 'You may optionally add modules (online courses, live events, etc.) which will provide guidance for learners seeking more information or training on this skill.' Below this, there is a table of associated modules. The first row is selected, indicated by a checked checkbox in the first column. The 'Delete' button is highlighted with a red box. The table has columns for 'Title' and 'Type'. The first row contains the title '"Burnout" in Healthcare: Why It Happens and What It Means' and the type 'Course'.

	Title	Type
<input checked="" type="checkbox"/>	"Burnout" in Healthcare: Why It Happens and What It Means REL-AC-SWK-TT-30219	Course

[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.

OVERVIEW

- Dashboard

SOLUTIONS

- Learning
- Training Plans
 - Training Plan List**
 - Training Plan Templates
 - Training Plan Search Filters
- Modules
- Shared Completions
- Policies & Procedures
- External Training Templates
- Video Files

Training Plan List

Export Training Plans | + Create New Training Plan

SHOW FILTERS

Title ↑	Type	Status	Owner	Assigned	
ACA Accreditation Standards	Recurring every 3...	Approved	Relias Demo Site	0	
Acute Care Clinical Express Annual	Non-recurring	Approved	Relias Demo Site	0	
Advanced Wound Treatment	Fixed: Non-recurr...	Approved	Relias Demo Site	0	
Annual Training	Fixed: Recurring	Approved	Relias Demo Site	11	
Dynamic Date Recurring	Recurring every 3...	Approved	Relias Demo Site	7	
Fixed Date Nonrecurring	Fixed: Non-recurr...	Approved	Relias Demo Site	59	
New Hire Orientation	Fixed: Non-recurr...	Approved	Relias Demo Site	0	
Relias Platform Introduction	Non-recurring	Approved	Relias Demo Site	1	

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.

Back to Training Plan List

Training Plan Enrollment: Annual Training

TRAINING PLAN PROPERTIES
Fixed - Recurring annually | + SHOW DETAILS Modify

CURRENTLY ENROLLED **ENROLLMENT**

LEARNERS ENROLLED TRAINING PLAN COMPLETION HISTORY | EXPORT LEARNERS

Filter By: A-Z + Filters Clear 1-7 of 7

	Name & Username	Hierarchy	Job Titles	Hire Date	Reporting Start Date	Reporting Close Date
<input type="checkbox"/>	Albertson, Anna aalbertson			7/1/2014	3/27/2021	12/31/2021
<input type="checkbox"/>	Brittingham, Patty pattybrittingham	Level C	Financial Analyst; RN		3/29/2021	12/31/2021
<input type="checkbox"/>	Bullard, Matt mbullard12345	Level C			3/29/2021	12/31/2021
<input type="checkbox"/>	Cantagallo, Sally sallycantagallo	Level C	HR Manager		3/29/2021	12/31/2021
<input type="checkbox"/>	Carter, Jodi jodicarter	Level C	Assistant Director		3/29/2021	12/31/2021

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.

The screenshot shows the 'MANUAL ENROLLMENT' page. At the top, there are enrollment settings: 'Available to learners immediately' (unchecked) with a '30 days before the Due Date' input, and 'Reporting Start Date: completions within 30 days prior to learner enrollment will be credited toward the Training Plan requirement' (checked). Below this is the 'Available Learner(s)' section with a search bar and a 'Filter By' dropdown set to 'A-Z'. A red box highlights the 'All Job Titles' filter option. A '+ Filters' button is also highlighted with a red box. A dropdown menu is open, showing options: 'A-Z', 'User Location', 'Department', 'Job Title' (checked and highlighted with a red box), 'Employment Type', 'Ethnicity', 'Custom Field 1', and 'Custom Field 2'. Below the filter menu is a table of learners with columns for 'Name & Username', 'Hierarchy', and 'Job Titles'. The first row is 'Administrator, Relias' with 'Relias Demo Site' in the hierarchy. The second row is 'Andorfer, Suzette' with 'Counselor' in the job titles. The third row is 'Andrews, Amy' with 'Level C' in the hierarchy and 'Counselor' in the job titles. A red box highlights the 'Enroll' checkbox for the first learner. A red box with the number '2' is next to the 'Job Titles' column header.

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.

This screenshot shows the 'MANUAL ENROLLMENT' page with the enrollment settings section. It includes the same settings as the previous screenshot: 'Available to learners immediately' (unchecked) with a '30 days before the Due Date' input, and 'Reporting Start Date: completions within 30 days prior to learner enrollment will be credited toward the Training Plan requirement' (checked).

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 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.

The screenshot shows the 'TRAINING PLAN PROPERTIES' interface. At the top, it says 'Fixed - Recurring annually' and '+ SHOW DETAILS'. Below this, there are two tabs: 'CURRENTLY ENROLLED' (highlighted with a red box) and 'ENROLLMENT'. Underneath, there are three links: 'LEARNERS ENROLLED', 'TRAINING PLAN COMPLETION HISTORY', and 'EXPORT LEARNERS'. A 'Filter By' dropdown is set to 'A - Z'. Below the filter, there is an 'Unenroll' button with a checkbox. A table lists learners with columns for Name & Username, Hierarchy, and Job. The first learner, Anna Albertson, has a checked checkbox and a red arrow pointing to it. The second learner, Patty Brittingham, has an unchecked checkbox.

	Name & Username	Hierarchy	Job
<input checked="" type="checkbox"/>	Albertson, Anna aalbertson		
<input type="checkbox"/>	Brittingham, Patty pattybrittingham	Level C	Fin.

