

Set your Learners up for Success

The following information has been designed to help you create a streamlined Relias onboarding experience for your Learners. Use the suggestions below as a guide to create your own successful program. We recommend introducing these resources within the first week of orientation.



Help your Learners become comfortable with Relias



Increase early adoption of learning platform



Provide onboarding clarity

Resource	What does it do?	Title of Document
<u>RELIAS QUICK START GUIDE</u>	Provides a step-by-step guide for accessing the platform	See <i>Relias Quick Start Guide—What You Need to Know</i> article in Relias Connect
<u>PASSWORD RECOVERY AND LOGIN ASSISTANCE</u>	Introduces your organization's customized URL for easy access and how to reset password if recovery options have been set up	Contact your Relias team for the flyers titled <i>Login Assistance</i> and <i>Password Recovery Options: Complete Your Account Set-Up</i>
<u>INTRODUCING RELIAS</u>	Introduces Relias and its key features and functionality	Contact your Relias team for the editable flyer titled <i>Introducing Relias: Your Go-To Destination for Learning</i>
<u>LEARNER HELP RESOURCE</u>	Highlights how Learners can receive technical assistance	Contact your Relias team for the editable flyer titled <i>Relias Learner Guide</i>
<u>LICENSE ENTRY</u>	Provides guidance for entering professional license and/or certificate details for CEU enrollment	Contact your Relias team for the editable flyer titled <i>License and Certification Entry</i>
<u>MOBILE APP</u> *Only available if mobile app is enabled for your organization	Introduces the Relias Learner app and steps for accessing it Available in the Android or iOS app store App title: <i>Relias Learner</i>	Contact your Relias team for the editable flyer titled <i>The Relias Learner Mobile App</i>

ONBOARD EFFECTIVELY

Get Every Learner Acquainted

Send the Learner the Onboarding Toolkit resources.

You may provide this information to Learners in an email, include in an online resource (SharePoint), assemble them in a custom course or Policies and Procedures Binder, or print out the resources to be included as part of your orientation packet.

Confirm the new Learner's profile is created.

Ensure that all necessary user profile fields are entered for successful auto-enrollments. Verify the Learner's email address has been entered correctly to receive automatic email notifications.

Instruct the Learner to complete the walkthrough tutorial upon first login.

If dismissed, here is how to re-engage: Instruct the Learner to click on the Support Center (🔗), click on **Navigation Help**, and select the **Welcome to Relias Tour**.

Establish how a Learner can get help if needed.

If you have a process for this, communicate it. If you do not have a process, share the Learner Help Resource listed in the table above.

ONBOARD SEAMLESSLY

Ongoing Site Best Practices

Ensure the **Relias Account Information email template is set up for success.**

This is the first email the Learner will receive upon account creation. It will provide the Relias URL and username for the Learner to access their account. Customize this email with additional details that will help your Learner understand how Relias will be used within your organization.

Create **Login Instructions on your **Settings** page.**

Want to make the log in process easier? Set up **Login Instructions** on your Settings page to give learners reminders about their username and password.

TIP: Consider enabling Single Sign-On (SSO) so Learners can easily log into their Relias account through a third-party authentication system. Reach out to your Relias Team to learn about how this feature works!

Confirm the correct contact is entered as the **Contact Email in your **Settings** page.**

Under Contact Information and Settings, you will enter an email address where all help inquiries from Learners will be routed. Ensure there is an internal help process established when a Learner sends a message through the **Request Help** feature.

Create your own custom module or **Policy Document to introduce Learners to Relias.**

Use the custom module or Policies and Procedures tool to build a more personalized onboarding experience.

To brainstorm additional strategies on introducing Relias to your Learners please reach out to the Relias Team.