How to Get Relias Ready for the New Year

Follow this guide to prepare your Relias Platform site for the coming year.

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The new year provides a great opportunity to evaluate and revamp your Relias site to ensure your organization is meeting its training and education to help get you started as you plan for a successful new year.

Step One: Evaluate Where You Are Now

Before setting goals and making updates to your Relias site for the new year, it's important to evaluate what has (and hasn't!) worked well for you in t are some tips to get started:

Run reports to review this year's training progress. The Learner Status report can provide a great overview of your completion and complian year. The Course Completion History report can show you any overdue courses for the year, so you can track what hasn't been completed. The report can provide insight into how many hours of training you've completed in the Platform in the current year.

Make sure your user information is up to date. Export your User List to confirm that it accurately accounts for your current workforce. Revie identify users who haven't logged into Relias this year, users whose profile information is inaccurate, and users who don't have the permissions

Take inventory of the modules you've assigned throughout the year. Figure out what courses have been assigned, to whom, and on what s assigned your courses through Training Plans, exporting your Training Plan list is a great way to review your assignments. If you're using auto-e check that they're up to date and enrolling the correct users.

Step Two: Set Training Goals for the New Year

Once you've evaluated your progress for the current year, it's time to think about your goals for 2023. Take a look at some common goals many of ou

- Ensure staff are completing required training on time.
- Align Training Plans to meet state and facility-level regulatory requirements.
- Help licensed staff take advantage of Relias' CEU offerings.
- Track in-person and external trainings in Relias so all training records are in one place.
- Build a staff development program.
- Adopt automation to improve Administrator workflows.

Step Three: Make Updates to Your Site

Below are some best practices, tips, and tricks that you can implement to help you achieve your training goals and ensure your site is set up for succe

Update your user information so that all current staff have access to their Relias training.

- Deactivate users who are no longer with your organization.

- Update user attributes like job titles and departments as needed. Consider using our Bulk User Import process if you have a large number make.

- Assign the appropriate user permissions to your instructors, supervisors, and other relevant staff.

Make sure your hierarchy reflects the reporting structure of your organization.

- Every user should be in a hierarchy level, and each level should have at least one Supervisor.

- Designate a Supervisor in each level as the Notifications Recipient to receive training alert emails about their users.

Save and automate reports to track completion and compliance rates throughout the year, so that all key stakeholders stay informed of tra round.

Update your existing Training Plans or create new ones.

- If there are Training Plans on this list that are no longer in use, unapprove them for enrollment so they don't clutter your list.

- Review Relias' Crosswalk Library to choose courses that align with your state and federal regulations, if applicable.

- Stagger due dates throughout the year to avoid an end-of-year training backlog.

- Build department- or role-specific Training Plans so that your Learners are assigned the content most relevant to their positions.

Create automatic enrollment profiles for training plans to reduce the time you spend manually enrolling Learners, and to make sure that no assignments they need. Make sure the appropriate user attributes are entered into your site and that required fields are set so that your auto effective.

Enter your licensed and certified staff's license information into the Platform, or encourage Learners to enter it themselves. Communicate Learners can use the Relias Platform to earn CEUs with the appropriate staff.