



Trust University

SUPERVISOR

INSTRUCTIONS

Serviced by:
RELIAS

Questions?

Contact your Trust University Supervisor, use Relias Connect for chat support during business hours, or e-mail losscontrol@wctrust.com for help.

Welcome to your Supervisor Role.

Log In Often to Stay On Track.

USE THIS URL

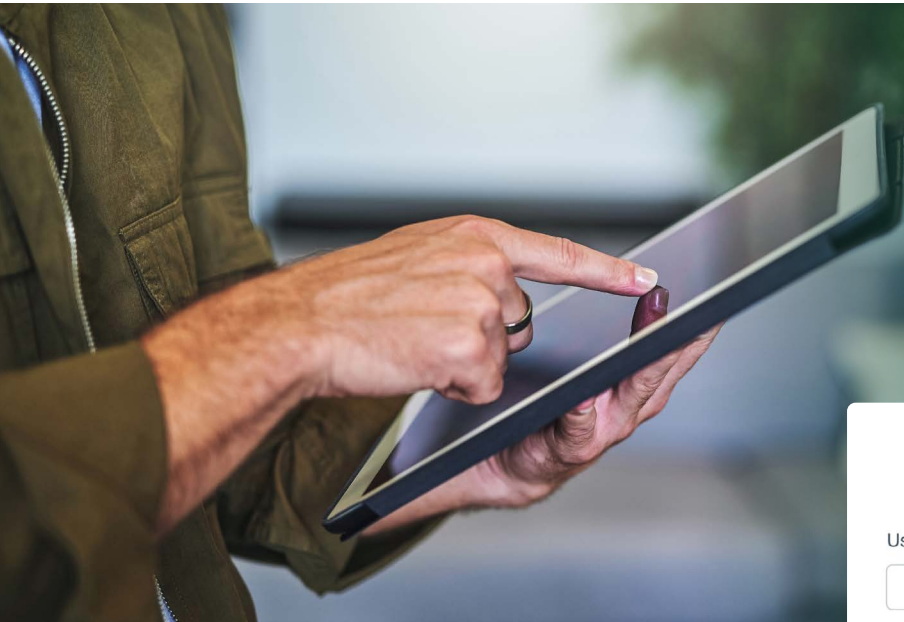


Once logged in navigate to the person icon in the upper right corner

of the site then →

MY ACCOUNT →

ANSWER SECURITY QUESTIONS



Forgot your password?

There are options! For assistance click "Forgot your password?"

To reset your password, you will need to provide your username or last name and email.

If you don't receive the security code, or if you do not have access to email, you can elect to answer the security questions instead.

RELIAS

User Name

Password

[Forgot your password?](#)
[Request Help](#)

Don't have an account? [Create one now!](#)

[Change Site Language](#) | [View System Requirements](#)

STILL HAVING TROUBLE?

Contact _____

TRUST UNIVERSITY: RELIAS LEARNING SUPERVISOR QUICK GUIDE

ACCESS AND PERMISSION LEVELS

As a Supervisor, you have access to manage a specific group of Learners based off your placement in your organization's Hierarchy, which is managed by your Relias Administrator. Supervisors have the ability to create and manage Learner's profile information, reset passwords, assign optional and required training, manage assignments, and report on progress. Some Supervisors may be limited from completing some of these tasks based off the permissions your Administrator assigned you.

Best Practice Tip: As a Supervisor getting started on the Relias Platform, it's a good idea to check with your Administrator to understand what permission levels you have in the system, and what your internal responsibilities as a Supervisor are. For example, some Supervisors are strictly responsible for ensuring their Learners have completed their required training as assigned by their organization, while other Supervisors are responsible for creating new Learners in the system as they are hired, assigning them their required training, and ensuring their ongoing compliance.

LEARNER MANAGEMENT

How to create a new Learner:

1. Navigate to **Users > User List > + New User**.
2. Fill out any required fields and click **Save**.
3. If you entered in an active email address, the Learner will receive an email with a login URL and their Username. Be sure to let them know what their password is.

How to edit a Learner's profile or password:

1. Navigate to **Users > User List > click the Learner's name**.
2. Update any profile information necessary or change their password.
3. Click **Save**.

Please Note: If you aren't able to view a specific Learner in your User List, you may be restricted from accessing their profile because of your organization's Hierarchy settings. Reach out to your Relias Administrator to have this addressed.

ASSIGNING TRAINING

GROUP ASSIGNMENT

A Training Plan is one or more modules that have been grouped together by your Relias Administrator that can be assigned out to one or more Learners on a pre-determined schedule. Typically, your Relias Administrator has created Training Plans for both orientation training and ongoing annual training. To view

and assign the Training Plans your Relias Administrator has created, follow these steps:

1. Navigate to **Learning > Training Plans > Training Plan List**.
2. Click the title of the Training Plan you wish to assign. If necessary, click **Show Details** and then the **Magnifying Glass** to view the list of modules in the Training Plan and their associated due dates.
3. Select the **enrollment button > select the Learners** you wish to enroll > and click **Enroll**.

Please Note: If you are unable to complete these steps, you may not have the required Supervisor permissions. Check with your Relias Administrator to have this addressed.

Best Practice Tip: Training Plans can be set by your Relias Administrator to automatically assign to new Learners based on their profile attributes. If you find yourself often manually assigning Training Plans to your Learners, check with your Relias Administrator about setting up Automatic Enrollment.

INDIVIDUAL ASSIGNMENT

There are [various types of modules available](#) in Relias such as Online Courses, Live Events, Requirements Trackers, and Skills Checklists. The most common type of module is a Course, which typically includes online lessons and a final exam. Individual modules can be assigned with a due date (required training) or without a due date (optional training). To assign a module to one or more Learners, follow these steps:

1. Navigate to **Learning > Modules > Module List**.
2. Use the search bar and available filters to locate the module you wish to assign.
3. Select the **enrollment button > select the Learners** you wish to enroll > choose a **due date** if applicable and click **Enroll**.

Please Note: If the module you are assigning is required training, don't forget to choose a due date! Learners will be reminded of their assignment weekly via email starting 30 days before the due date, and then daily starting 5 days before the due date.

RUNNING BASIC REPORTS

Reports can be set up to view assignments that have been completed or not yet completed, overall assignment completion or compliance percentage, and much more. Below are two of the most commonly utilized reports by Supervisors and why they are typically used.

- [Course Completion History](#): Use this report when you need to view a list of assignments that have either been completed, or have not yet been completed.
- [Learner Status Report](#): Use this report when you need a summary view of your Learner's completion and compliance percentages.

How to Navigate & Use the Supervisor Role

Understanding the Supervisor Permission

There are five access levels for Supervisors (which can be selected independent of each other and in any combination):

- Report Management
- Enrollment Management
- Training Plan Enrollment
- Module Enrollment
- User Management

Depending on which permission Supervisors are given, they may be able to do the following tasks:

Task	Report Management	Enrollment Management	Training Plan Enrollment	Module Enrollment	User Management
Marking Modules Complete		Refer to Settings		Refer to settings	
Enroll Learners into Modules		X		X	
Add/Edit Users					X
Enroll Learners into Training Plans	X	X	X		
Run and Save Reports	X				
Add External Training to Transcript		X	X	X	
Upload attachments for Requirements Tracker		X		X	
Run Competency Review Reports	X				

***If Supervisor itself is selected – it marks all the other Supervisor roles as checked (User Management, Enrollment Management-both Training Plan and Modules, and Report Management). ***

Who can Supervisors use these permissions with? Supervisors will have access to use these permissions on the staff they have assigned to them in the Hierarchy (which is created/maintained by the Administrator). Supervisors have access to users' data in their own assigned Hierarchy level, sub-levels of their Hierarchy and additional hierarchies if assigned.

Here is a breakdown of the detailed functions each permission allows:

The **Report Management Supervisor** can be considered the most basic level of Supervisor access assignable.

A Report Management Supervisor can:

- o Run any of our reports to learn more about the training performance of the user in their Hierarchy level(s).
- o Export reports as PDFs, Excel, or CSV files.
- o Save reports to be accessed later.
- o Automate saved reports to be sent to themselves, Administrators, and anyone else with Reporting Management Supervisor access.

The **User Management Supervisor** can be considered the highest level of access for a Supervisor. The User Management Supervisor can:

- o Create new Learners in their Hierarchy level.
- o Deactivate Learners in their Hierarchy level.
- o Export Users within their Hierarchy as an Excel document.
- o Email a user (if the individual has an email address in the system).
- o Reactivate previously deactivated Learners in their Hierarchy level.
- o Review and update user profile fields (such as passwords, emails, job titles, etc.)
- o Access the "Blue Book" transcript page of anyone in their Hierarchy and, if enabled, add external training
- **Supervisors CANNOT edit a user's username, Hierarchy placement or change anyone's permissions**

The **Enrollment Management Supervisor** is the next level of access. Enrollment Management is broken up into Module Enrollment and Training Plan Enrollment, and you may have one or both. Enrollment Management Supervisors can:

- Assign individual modules to users in their Hierarchy.
- Assign training plans created by Administrators to users in their Hierarchy.
- Unenroll users from modules and/or Training Plans.
- Add external training to a user's transcript.
- Change due dates for modules.
- They can mark user completions (based on module settings, for modules that are not Relias-owned).
- Access the "Blue Book" transcript page of anyone in their Hierarchy and, if enabled, add external training.

The **Training Plan Enrollment Supervisor** is the next level of access. Training Plan Enrollment Supervisors can:

- Assign training plans created by Administrators to user in their Hierarchy.
- Unenroll users from Training Plans.
- Add external training to a user's transcript.
- Change due dates for modules.
- They can mark user completions (based on module settings, for modules that are not Relias-owned).
- Access the "Blue Book" transcript page of anyone in their Hierarchy and, if enabled, add external training.

The **Module Enrollment Supervisor** is the next level of access. Module Enrollment Supervisors can:

- Assign individual modules to Users in their Hierarchy.
- Unenroll users from modules.
- Add external training to a user's transcript.
- Change due dates for modules.
- They can mark user completions (based on module settings, for modules that are not Relias-owned).
- View the Currently Enrolled Users in training plans that are in their Hierarchy
- Access the "Blue Book" transcript page of anyone in their Hierarchy and, if enabled, add external training

To learn more about Permissions in Relias, visit Relias Connect and search for the *User Permissions and Relias Job Roles* instructional guide.

Using Notifications Recipients

Supervisors can have any of the above permissions and be designated as the Notification Recipient for their Hierarchy level. The Notifications Recipient (NR) is seen as the user's designated supervisor and will be the recipient of all automated emails sent to supervisors (for a complete listing, check out the *Email Templates- Types, Management & Customization* guide on Connect).

Once a Supervisor has been selected as the Notifications Recipient, they will receive weekly training alert emails for all users assigned in their primary Hierarchy level (which include upcoming and overdue assignments). The email will provide the names of the users and the modules that are overdue or coming due soon. For the email notifications to go out, some conditions need to be met:

- The email template must be approved (determined by the Administrator)
- The due date threshold of the module assignment(s) included must have passed its 30-day mark (live events may be greater)
- At least one mail day must have passed, within the 30-day module notification period
- Users in the assigned Hierarchy must still have courses overdue or coming due

Weekly training alerts will only include users in the Supervisor's exact Hierarchy level, not any assignments for users in sub-levels or additional Hierarchy level(s) they have access to. If data is needed for those users, we recommend setting up a saved report to see that data (the Course Completion History report is most similar).

Key Functions of the Site to Explore

Understanding the Dashboard

- The system logs you in with the highest permission assigned— users can view this assigned permission in the **upper right-hand corner** and use the dropdown menu to toggle between assigned permissions (i.e. they will need to toggle to their Learner profile to take any of their own assigned training).
- The graph visible in the center panel is the course status performance chart.
 - o It will display assignments that are due during the current quarter (completed on, not completed but not overdue, overdue) to give a quick snapshot of site performance for their team.
- If gamification is enabled, the leaderboard will be visible.
- The most important area of the Dashboard is found in the lowest panel called Course Updates.
 - o In this area, all upcoming changes to Relias content will be visible including new course releases, archived modules or module updates. To learn more about this information and how you can interpret it, check out the *Course Updates Report- Archives, Swaps, and Replacements* guide on Connect.
 - o We recommend reviewing this area at least once/month to make sure you stay up to date with your library.
 - We also send these course updates in a monthly email to you!
- To learn more about the Dashboard page, view *The Supervisor Role* guide on Connect.

Managing Users in the User List

- As a reminder, Supervisors can only view/edit users that are assigned to their Hierarchy level or additional Hierarchy levels by their Administrator.
 - o The default view is going to be their primary Hierarchy assignment, but a dropdown menu will appear on the user list to toggle through the users in the additional hierarchies they have been granted access to.
- If User Management is assigned, Supervisors can create, deactivate users, and edit profiles
 - o View the *Creating & Editing Users (Video)* on Connect to learn how to modify profiles.
 - o It is important to note that any field in a user's profile with an asterisk (*) is a required field designated by the Administrator and must be completed to save the profile.
 - o Always ensure that an email address is entered so that users receive warning emails as well as the welcome email to log into their account.
 - o To learn more about user profiles, check out the following training articles in Connect:
 - *Editing User Status- Active, Inactive, and OnLeave*
 - *Editing the User Profile or Job Role*
- Part of what makes the site successful is CEU management and tracking—if the Supervisor has the licensing/certification information for the user, they can enter this on their behalf as well.
 - o Check out the training video for this on Connect called *Managing Licenses and Certifications— For Admins/Supervisors (video)*.
- To view current assignments, modify due dates or print certificates for users, Supervisors can view the user's transcript page via the blue book icon to the left of their name.
 - o Review the *Using the Learner Blue Book* guide to understand the transcript and the actions available.

Reviewing Assignments in the Learning Panel

- Explore the Module List to see all available listings in your organization's library for assignment. This page will include Relias owned modules and any material created by your organization.
 - o To learn how to search and filter module listings, check out our training guide called *The Modules List- How to Search, Filter, Export*.
 - o **Why to review library & search for modules:**
 - Training Plan Creation: Administrators can create bundles of modules together to assign as packages to users through Training Plan functionality. Supervisors are encouraged to ensure that their team has the right assignments and highlight any requested modules to their Administrator for inclusion.
 - Corrective Behavior: Supervisors can assign one time module assignments as necessary to correct a problem/potential concern or to promote staff development (if have enrollment permissions).
 - Example – If user is having a concern with HIPAA or communication, a Supervisor could assign a relevant course to improve user skills.

- If Supervisors find a module they want to assign to their staff, they can follow the instructions in the *Assign Your Learners a Module* guide.
 - o Module assignments can be either mandatory (by assigning a due date before hitting the enroll button) or elective/optional (by choosing to not assign a due date). If no due date is assigned, Learners can withdraw from the module on their end.
 - If Supervisors want to promote a module to their staff and allow learners to choose whether/not to enroll, they can share the module's unique link using the Click-to-Learn feature. Check out the *Click-to-Learn* guide to learn more.
- To learn how to manage module assignments (like how to edit the due date, mark the module complete, etc.), check out the training video called *Enroll and Assign Using Modules (video)*.
- If given the permission, Supervisors can also enroll learners into the bundled assignments, Training Plans.
 - o Check out the training guide on Connect called *Manually Enrolling Learning in a Training Plan* to learn more.

*If Supervisors do not see the enroll button, then they do not have this permission.

Running Reports

- Supervisors can run any of our reports in the system & the results will include only their assigned learners.
 - o Many of our reports use similar filtering properties to customize results. Check out the *Functions Common to Most Reports* guide to learn how to use report filters.
- The top 2 reports we recommend beginning with are:
 - o Course Completion History report- with this report, Supervisors can see all completions, all assignments not completed or a combination of both. The report can also provide data for all learners or just an individual learner if needed.
 - Check out the *Course Completion History* guide to learn how use this report.
 - o Learner Status Report – This report will show completion and compliance statistics for the team, as well as break down assignments by how many assigned vs completed on time vs not complete, overdue.
 - Check out the *Learner Status Report* guide to learn how to use this report.
- It is important to note that if Supervisors are attempting to run incomplete assignments or the compliance report, they must pay attention to the due date range to ensure it will capture ALL desired assignments.
- Supervisors also can save any report to their Dashboard for easy access or to set up email automation and receive emailed copies of their desired report.
 - o Check out the *Saving and Automating Reports (Video)* to learn more.

Troubleshooting Learner Issues

Resources to Review

- Supervisors are often seen as the frontline to support learners in any system-related questions or issues (and of course, are learners themselves when it comes to completing their own assignments). To prepare for these questions and increase comfort with the Learner role, we recommend reviewing the following resources on Relias Connect:
 - o *Relias Quick Start Guide- What You Need to Know*
 - o *The Assignments Tab*
 - o *Make Sure Your Browser is Fully Updated for the Relias LMS*
 - o *Why Can't the Learner Access the Exam?*
 - o *Disabling Pop-Up Blockers*

Technical Support

- Supervisors can connect with our Technical Support team if they need any assistance, have questions about site functionality or have questions. Contact our support team by:
 - o Chat with the **Online button in the lower right of your screen when logged into the LMS**
 - o Give us a call at 1-800-381-2321 option 1
 - o Submit a web ticket on Relias Connect

A Deep Dive Into Your Relias Library

There is so much to uncover within your Relias subscription! At times, it might feel difficult to know where to begin with so many options. Here are some steps to help you find the content you need and discover hidden gems along the way.



☆ HELPFUL HINT

Review the Course Update Summary **once per month** to plan a proactive response to any content changes. The Course Update Summary section is found on the Dashboard for Administrators and Instructors, and under the Modules section for Supervisors.

Be the First to Know!

Just like the needs of your learners, your Relias library is constantly evolving. To stay in the know, check out the **Course Update Summary**. Here you will find updates to our content including new releases, planned archives, and course swaps.

Improve Your Search

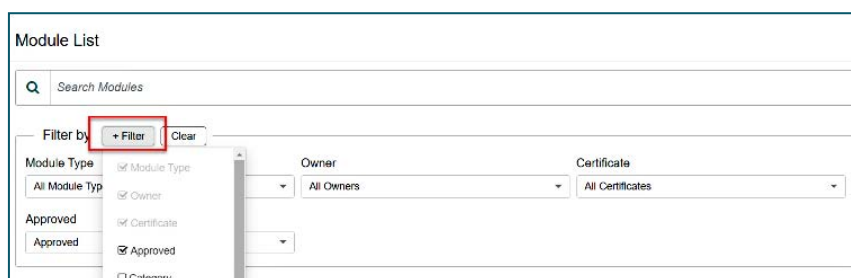
When viewing the Module List page, your first option to identify content is to use the search bar. You can use this tool to find module titles or descriptions using keywords.

In addition to using the search bar to locate specific content, you can explore any of the following filters. Using filters can be a powerful tool in narrowing down broader content.

Here are some of the available filters and suggested use cases:

DEFAULT FILTER OPTIONS

- + **Module Type:** Review different learning or training formats like course, pro-on-the-go, live event, personalized learning, etc.
- + **Owner:** Identify Relias modules versus organization-authored content.
- + **Certificate:** View continuing education-approved content by the accrediting body.
- + **Approval:** Display which content is approved for enrollment versus archived/not ready for enrollment.



ADDITIONAL FILTERS

You can also select the **+Filters** button to review additional options including but not limited to:

- + **Category:** Review modules grouped together by a shared topic or theme.
- + **Training Plan:** View modules included in the selected training plan.
- + **Audio:** Determine which modules will include audio elements.
- + **Video:** Find which modules will include video elements.
- + **508 Compliance:** Identify which modules are approved for ADA and website accessibility standards.
- + **Language:** Isolate which modules are available in Spanish.

Dig Into the Details in Excel

Once you have the Module List filtered down, you can select the **Export Modules** button to download all of the module details to an Excel spreadsheet. The export will include the module description, owner, course code, title, module type, credit hours, approval status, and certificate information.

Screen Content Before It Is Assigned

If you find a module that interests you, feel free to preview the module! To ensure the module is what you are looking for, review the following elements:

- + The credit hours or module length
- + The description
- + For courses, the provided transcript (PDF) file under the Content tab, the exam questions under the Exams tab, and certificates under the Certificates tab
- + The preview button which allows you to experience the content as a learner would

The screenshot shows a web interface for a module titled "Employee Wellness - Emotional Intelligence: Awareness". At the top, there are tabs for "PROPERTIES", "CONTENT", "EXAMS", "EVALUATION", "CERTIFICATES", and "SEARCH FILTERS". The "CONTENT" tab is active. Below the tabs, there is a "CONTENT" section with a "PREVIEW" button highlighted by a red box. Below that is an "Add Lesson" section with a "content selection" dropdown and a "Final Exam" input field. At the bottom, there is a "TRANSCRIPT FILE" section with a file name "REL-ALL-0-ENTE-1Transcript.pdf" highlighted by a red box.

- + For other module types, all associated tabs such as Tasks (Skills Checklist) or Standards (Competency Review)

DID YOU KNOW...

Custom content can also have additional filter tags? By default, each module has a type, owner, and approval tag. In the Format section of the module properties page, additional tags can be added. You can also add your own search filters and values under the Module Search Filters section and associate those with your custom content and Relias courses.

☆ HELPFUL HINT

After opening the Excel spreadsheet, you can use common Excel filtering and searching options to review the details. For instance, you can use the Ctrl+F feature to search the document for key terms or interest areas.

☆ HELPFUL HINT

Organization-specific content can be added as a custom lesson to an existing course in order to personalize the material.

CONNECT WITH YOUR CLIENT SUCCESS MANAGER

to dive deeper into the wonders of your Relias library or explore additional libraries in the Relias catalog!

BLENDED LEARNING

Engage Your Staff With A Blended Learning Approach

What is Blended Learning?

Blended learning is an approach that combines classroom-based live learning sessions with online, self-directed education.

BENEFITS INCLUDE

- + Addresses various learning styles
- + Encourages self-motivated learning
- + Focuses on proficiency and skills application
- + Heightens learner engagement

Live Learning Tools in Your Site

There are various ways to track live or in-person training in your site! Here are the different tools available to you:



SKILLS CHECKLIST

- + Record and report on job-specific competencies
- + Track performance in Relias electronically
- + Demonstrate that training has been internalized



LIVE EVENT

- + Allow for specific dates, times and/or locations to be designated
- + Allow learners to choose from multiple sessions
- + Enrollment in a session can be linked to Outlook



REQUIREMENTS TRACKER

- + Allow learners to upload documents/PDFs
- + Track and/or store required documentation
- + Does not require content or exams

Consider exploring our Virtual Classroom atmosphere to host live training! This tool is intended to create an interactive classroom to engage learners in polls and quizzes, chat with learners, display scheduled contents and use breakout room feature.

Online and Self-Directed Learning in Your Site

Relias offers a range of module and tool options for online and self-directed learning for your blended learning approach:



COURSE

- + Use already created Relias content or custom build your own
- + Upload content covered during live training sessions (PDF, video, podcast, PPT)



PERSONALIZED LEARNING

- + Pinpoint learner knowledge and skill gaps
- + Reduce variation and standardize quality of care



PRO-ON-THE-GO

- + Access modules specifically designed for mobile devices (phones and tablets)
- + Provide microlearning modules at the point of care

Putting Blended Learning into Practice

When designing your Training Plans, we recommend utilizing different modules types to provide an enriching experience for your staff. The Training Plan below contains a variety of module types including two e-learning Courses, a Live Event, a Skills Checklist, and a Requirements Tracker.

Infection Control for All Staff (Non-Recurring Training Plan)		
Infection Control: The Basics 0.25 hours	Due 5/21/2021	300 Bonus Coins
Donning and Doffing of PPE 0 hours • Thursday, August 26, 2021 (8:00 am - 9:00 am Eastern) Change Session You are currently on the waitlist	Waitlisted Due 5/21/2021	Go To Event
Basics of Hand Hygiene Self-Paced 0.25 hours	Due 5/23/2021	300 Bonus Coins
Hand Washing	Due 5/24/2021	Show Details
Infection Control Certification from Orange County 0 hours	Due 5/25/2021	Take Now

For further information on strategies or additional products/tools available, contact your Client Success Manager.

Get Creative

Custom training plans & courses can be created & added to your Relias library by a WCT administrator. Email us at losscontrol@wctrust.com to learn more!

With Relias Platform Features & Tools

While there are standard practices to use Relias tools to track and assign training, there are also some unconventional and creative ways you can leverage them to engage your learners. Here are some innovative ideas for consideration beyond the typical uses:

TRAINING PLANS:

Administrators can create and edit training plans. Training plans are used to group modules together for easy enrollment. Training plans also allow automatic recurrence of assignments and automated enrollment options. Consider using training plans to:

- + Bundle modules that offer CEUs or staff development options for a specific role.
- + Create a development program by selecting modules to enhance management skills and assign them to newly promoted leaders.
- + Build a tiered career development program at your organization. This could include self-directed courses as well as live training and/or mentorship for each level of your program (i.e., Tier I, Tier II, Tier III).
 - To prevent a negative impact on your compliance metrics, consider setting due dates far into the future if training is not time sensitive.
- + Create plans that reflect regulatory requirements and timelines. Crosswalks are a great resource for this!

CUSTOM COURSES:

Administrators and Instructors can create custom courses in the Relias Platform. Apply the Course module type to:

- + Share training materials to orient users to your organization's software or other platforms (i.e., EMRs, HR platforms).
- + Deliver an evaluation (survey) targeting employee satisfaction with current training offerings.
- + Feature an introduction to your company culture with a video message.
- + Provide your Employee Handbook to staff.
- + Add on to an existing Relias-owned Course with organization-specific practices regarding the training topic.
- + Create Relias Administrator/Supervisor training unique to your organization's use of the platform.
- + Include an attestation statement for live or virtual training that learners complete post-training.
- + Add a link to external content for learners to access within the Relias Platform.

HELPFUL HINT

For auto-enrollments associated with training plans, consider using Custom Fields to create a label(s) for unique populations within the organization that may not be captured by your traditional profile attributes (i.e., Departments, User Locations, Job Titles).

Optimizing Relias Reporting

Relias reports provide a plethora of information about your organization's learning and development initiatives. Reports also help you narrow your focus and find the data you need to answer key questions.

RELIAS REPORTS PROVIDE

- + Insight into completion and compliance metrics
- + Data on specific learners, departments, or Hierarchy groups
- + Details on your exam questions and learner responses
- + Summaries of your module evaluations

Choosing the Right Report

There are two helpful resources in Relias Connect to familiarize yourself with running reports:

- + Overview of Report Types & Categories (Video)
- + Functions Common to Most Reports

These resources will help you understand the most important elements to consider when running reports: **which report to use and how to use filters**. If you're having trouble determining which report to use, each report will provide a sample use case that might help. Once you have selected the best report, filters will allow you to ensure you're getting only the data you want in your results.



Filtering Options Available

Most Relias reports allow you to limit results by filtering based on your user profile information (Hierarchy, job title, department, etc.) and/or by specific assignments (Training Plan or Module). The data generated is based on these criteria as well as the date range selected in the Report Output. Some Relias reports utilize a Due Date Range or Completion Date Range; Please take note as to which date range is offered and the adjustments necessary to include the data you want in your report.

HELPFUL HINT

When using the Due Date Range, it's important to select an end date far enough into the future to capture those assignments that are not yet due.

Recommended Relias Reports

Below are suggestions for popular Relias reports based on common organizational needs:

ORGANIZATIONAL NEED

RECOMMENDED REPORT

Review who has completed/not completed assigned training

Course Completion History Report

Use the Status filter in the Report Output section to toggle between Complete, Not Completed, or All to customize results.

Monitor completion/compliance percentage across select groupings

Course Status Report

Select groupings based on professional information and provide stats such as number of modules assigned and/or number completed on time. This report is powered by due date range.

Monitor completion/compliance percentage for individual users

Learner Status Report

Provide completion/compliance data organized by the individual user. This report is powered by due date range.

Review user transcript details to prepare for an upcoming audit

Training Hours Report

Pull learner transcripts in bulk with course hours listed individually and totaled for each user.

Review user performance on exams and identify knowledge gaps

Item Analysis Report

Use this report to see aggregated data and identify commonly missed questions as well as first and/or last exam attempts.

ORGANIZATIONAL NEED

RECOMMENDED REPORT

View feedback on course content or a custom survey

Course Evaluation Survey Analysis

Use this report to see results submitted individually or aggregated for evaluations attached to modules and self-created surveys.

View results for each exam attempt

Exam Scores

Use this report to review module exam scores for pre-exams and post-exams to determine performance.

Audit which users have entered their license or certification in the site

Licenses & Certifications Export

Use this report to track license/certificate entry for learners and monitor upcoming renewals.

Find percentage of users in each demographic category

User Demographic

Use this report to review new user profiles created and relevant user profile data.

Print learner certificates in larger groups for audits or paper files

Bulk Certificate Printing

Use this report to pull Relias completion certificates for multiple users all at once.

*Instructional guides are available on Relias Connect by searching for the report title.

HELPFUL HINT

Most reports can be saved to your account for easy access. Once reports are saved, they are available on your personal Dashboard page and can be set up for automation. Visit the [Saving and Automating Reports \(Video\)](#) on Relias Connect to learn more!

CONTACT YOUR CLIENT SUCCESS MANAGER

to learn about more reporting options available and discuss how you can use reporting to improve outcomes at your organization!



Keep your license current.

Relias has a License & Certifications management tool from the Learner dashboard that makes it easy for you to track your professional license and certifications, for one or multiple states or professional roles.

Use the tool to search for CE courses according to professional license or certification. Relias assists in reporting continuing education completions to certain accrediting bodies.

Add your credentials under the **Licenses and Certifications** tab in the sidebar.

When browsing for courses, you can **filter the results** by license or certification.

