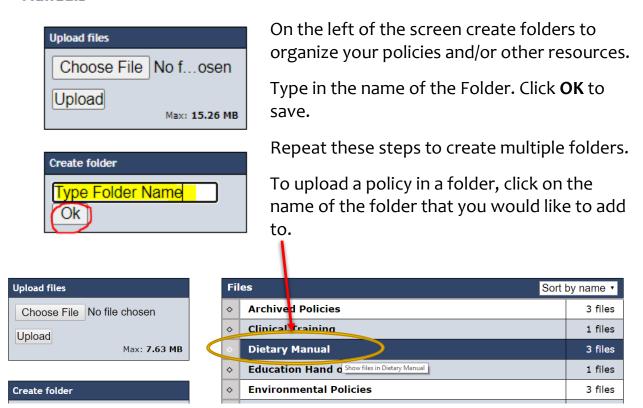
Uploading Documents/Education to the Document Sharer and Turning it into a Course



Click on Manage Document Sharer on your Surge Learning Home Screen

Manuals



To create a sub-folder within your folder/manual, type in the name of the sub-folder under CREATE FOLDER, and click OK

To upload a policy or document, click CHOOSE FILES

A window will open on your computer where you can search your computer for where the file is saved. Once you find the file, click on it and it will add to the Upload Section on the left side of the screen. Continue this process for each file.

IMPORTANT:

- Documents added MUST be in PDF format in order to be able to assign it and turn it into a course
- Documents that you add as Word, Excel, or PowerPoint cannot be assigned or viewed in the Document Sharer. These will simply be downloadable when staff click on it in Document Sharer.
- Document titles must not have "&" symbols. Rather, rename the title to say "and"
- Surge Learning will upload 15.26 MB at a time

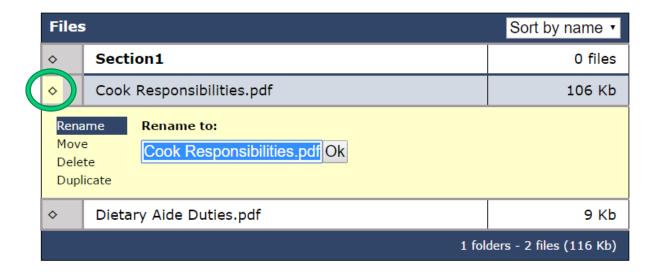
Once you have selected your files and they are sitting in the Upload File section ready to go, click UPLOAD



For more options click on the \Diamond icon to the right of the Policy title.

Here you can:

- Rename the Document: You must ensure that your policy title ends in .pdf
- Move the Document: In the picture below, I can move Cook
 Responsibilities.pdf to the folder Section1. When doing so, ensure you
 are spelling the folder name exactly as it is spelled.
- **Delete the Document:** ONLY delete if it was not assigned to staff as required. If you delete the document, it will delete all associated records of completion. IF IT WAS ASSIGNED, Create a subfolder called "Archive" and move the policy to that folder instead.
- Duplicate the Document

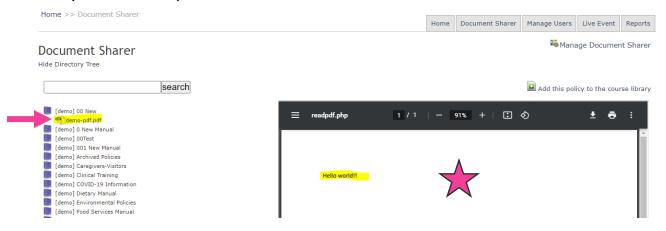


Before assigning the Course, make sure it is in the appropriate folder/subfolder and is renamed accordingly. If you assign the course and THEN move/rename it, the course will no longer work for staff (as the warning below suggests).

🕡 Warning: moving or renaming files that have been made in to a course will cause the course to no longer work. Please contact support for further details.

To Assign the Document:

 Go back to DOCUMENT SHARER and click on the Document Title to ensure it is visible on the right side of the screen. If it is not displaying, go back to Manage Document Sharer and check to ensure the title is appropriate (ending in .pdf). Again, if it is a Word, Excel, or PowerPoint (PPT) you will not see it on the right side (It will download to your computer instead).



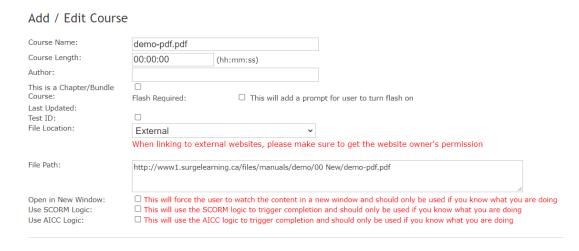
Click on ADD THIS POLICY TO THE COURSE LIBRARY



You will then proceed to a different screen.

The details of your Document Name will display here. **NO NEED TO ADJUST ANY OF THESE FIELDS (EXCEPT THE COURSE LENGTH IF YOU ARE USING THE TIMED COMPLETION).**

SCROLL DOWN TO THE BOTTOM OF THE SCREEN



At the bottom of the screen:

- Select the Category you would like it to go under in the Course Library. If you would like to create a new category, click ADD.
- ACTIVE STATUS Check this off ☑ to ensure staff are able to see it as an active course.
- Submit and Go Back to the Library: Saves the course, adds it to the library but DOES NOT assign it.
- **Submit and Continue:** Saves the course, and allows you to add a test if needed.
- **Submit and Set Required:** Allows you to assign the document as a required reading.



- Select the Education Group you would like to assign it to.
- If you would like to assign it to ALL STAFF, select that group (you <u>do</u> <u>not</u> also need check off the other groups ie. Nursing as Nursing Staff should also be under ALL STAFF in Manage Users).
- ORIENTATION IS ASSIGNED DIFFERENTLY AND WE WILL DO THAT ASSIGNMENT AFTER THIS ONE.

Required Gro	oups:	All Direct Care Staff All Staff Board Contractors Demo Annual Demo Orientation Dietary Education Coordinator Leadership Nurse Manager Nursing Practitioner Orientation - ALL STACO Orientation - Nurse Properties of Colorientation - Registers Orientation - Registers Orientation Demo Policy Staff Demo PSW RAI Coordinator Recreation Recreation Recreation Recreation Manager Registered staff RPN Social Work Support Services Test Test Group The Fun Department	FF are Staff actitioner
xempt These Users: lequired By:	Search for user Date: 11-30 Days Past: Specific Year	. For 2021 •	Select a due date in which you would like staff to complete the course (AVOID DEC. 31)
	Every Year Every 2 Years Every 3 Years One time Ever	and Create a New Instance	Select your frequency of assignment. This is easy to change at a later date.

If you would now like to set up an assignment for Orientation, click **SUBMIT AND CREATE A NEW INSTANCE**. If not, just click SUBMIT.

This time select your Orientation Group

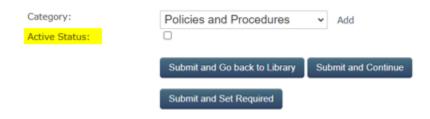
Required Groups:	 □ All Direct Care Staff □ All Staff □ Board
	□ Contractors
	☐ Demo Annual
	□ Demo Orientation
	☐ Dietary
	 Education Coordinator
	□ Leadership
	☐ Nurse Manager
	☐ Nursing Practitioner
	Orientation - ALL STAFF
	Orientation - Direct Care Staff
	Orientation - Nurse Practitioner
	Orientation - Registered Staff
	Orientation Demo
	Policy Staff Demo
	PSW
	RAI Coordinator
	Recreation
	Recreation Manager
	Registered staff
	□ RPN
	☐ Social Work
	☐ Support Services
	☐ Test
	☐ Test Group
	The Fun Department

For the **Required By** date, select **DAYS PAST** and type in the number of days you would like the course to be done after bringing a new staff member on board. Using the example "3", when you add a staff member into the system July 15th, their Orientation will be due 3 days from that date. When you add a staff member into the system October 12th, the due date for that employee will be 3 days after they are added to the system.



DO NOT USE ONE TIME EVER. Even though Orientation is done once ever, this button will never ask them to do the course again, even for their annual education.

If you assigned the course but it is not showing up in the library... You may have missed a step! Remember that ACTIVE STATUS checkbox?



You may have missed it, and that's okay! Here is how you can find your course.

DO NOT RETRACE YOUR STEPS AND TRY TO ADD IT AGAIN. The system will tell you that the course title already exists.

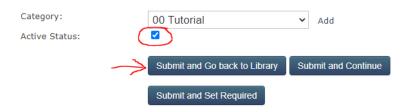
- Go to the COURSE LIBRARY.
- Using the dropdown menu in the Search Filters, select INACTIVE COURSES and Click GO



Find your Course Title and click on the PENCIL ICON



A new screen will appear. Scroll to the bottom of the screen and click the checkbox for ACTIVE STATUS so the checkmark appears.



Click **SUBMIT AND GO BACK TO THE LIBRARY**. If you have already set up your assignment, you do not have to re-do this step. Always go back to the library and test the course to make sure it opens properly!