

# How to Assign Education to Groups of Staff



## Courses Library

Click on the **Courses Library** on your Surge Learning Home Screen

Find the course you would like to assign and click on the calendar icon 📅 to the right of the screen



Workplace Bullying (6)						
<input type="checkbox"/>	Workplace Bullying and Incivility : 5 Part Series-by Surge Learning- January 2020 📄	00:55:05	Not Taken	active	all_canada	
<input type="checkbox"/>	Workplace Bullying Part 1 - Incivility in the Workplace-by Surge Learning-January 2020 📄	00:11:52	Not Taken	active	all_canada	
<input type="checkbox"/>	Workplace Bullying Part 2 - Understanding Bullying-by Surge Learning-January 2020 📄	00:14:40	Not Taken	active	all_canada	
<input type="checkbox"/>	Workplace Bullying Part 3 - The Law, Policies, and Culture Change -by Surge Learning-January 2020 📄	00:09:13	Not Taken	active	all_canada	
<input type="checkbox"/>	Workplace Bullying Part 4 - Behaviour Foundations-by Surge Learning-January 2020 📄	00:11:16	Not Taken	active	all_canada	
<input type="checkbox"/>	Workplace Bullying Part 5 - Measuring Success-by Surge Learning-January 2020 📄	00:07:38	Not Taken	active	all_canada	

If the course has multiple parts (such as the example shown above), you can use the calendar to assign individual courses (perhaps you only want to assign part 1 and part 3!) OR you can click on the calendar to assign ALL PARTS as the first Course Title suggests. This is the most efficient way to assign all parts at the same time.

If you would like to create your own bundle or package to assign, please see our Help File – **Creating a Bundle**

## After clicking on the calendar icon

- Click on the department category you wish to assign this course to.
- If this is for All Staff, check the **ALL STAFF** checkbox.
- No need to also select Nursing, Dietary, etc in addition to All Staff. In Manage Users, Nursing and Dietary staff should be incorporated under the group ALL STAFF.
- **Do not include Orientation** here either, as that gets set up differently than your annual education.

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

Your Education Groups will be unique to your own database, and may be different than the examples found in the screenshot above.

**Please note:** When assigning to a department (ie: Dietary) only staff members with that department checked off for them in Manage Users will see that assignment in My Courses. As an Education Coordinator, you may not see this in your own My Courses if (a) you aren't in the education group you assigned it to, or (b) you completed the course from the library already prior to assigning it.

## In the same screen (after selecting your Education Group)...

Select the **Required Category**: This is optional, and simplifies reporting so you can sort education requirements (MOL, MOH, RHA, Accreditation).

**Exempting Users (if applicable)**: Start typing the letters of the person's name or department. The system will auto-populate a list of users with those letters in the name. Click on the name you wish to exempt. Identify the year in which they are exempt from and type in your reason for exempting them ie: The staff person provided you a certificate of completion dated Jan 31, 2016.

**Score needed to pass the test**: If there is a test, you will see an option to enter the passing percentage. Enter the score here.

Required Category:

Exempt These Users:  For

Name	Reason	
Learning, Surge [2]	<input type="text" value="Provided certificate of completion"/>	

Score Needed to Pass Test:  %

Set Attempts:

Required By:

Date:

Days Past:

Year:

Specific Year

Every Year

Every 2 Years

Every 3 Years

One time Ever

Click on the space beside **“Date”** to pull up a calendar allowing you to select the month and date in which you would like to have this course completed by.

**Avoid a due date of December 31<sup>st</sup>.**

If you would like this course to be assigned for the same date next year, leave Repeat Every Year checked off and the system will automatically assign the course for you in the following year. At a later time, you can still remove this “Repeat” and alter the date as needed.

If this is also required for Orientation, click **SUBMIT AND CONTINUE**.

If this is not required for Orientation, simply click **SUBMIT** to finish.

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

After clicking **SUBMIT AND CONTINUE**, select the Orientation Group that needs to complete this course.

Score Needed to Pass Test:  %

Set Attempts:

Required By:

Date:

Days Past:  Days After Start Date/Anniversary

Year:

Specific Year

Every Year

Every 2 Years

Every 3 Years

One time Ever

Determine the score needed to pass the test (if there is one).

Instead of selecting a Due Date, select days past and type in a number.

Select This Year Only, or Repeat Every Year. **DO NOT USE ONE TIME EVER**. Even though Orientation typically is done once ever, using one time ever will ensure they NEVER see this assignment again (even if it is something they may need to continue doing as part of their annual training).

Click **SUBMIT** to finish

### **Some important things to remember:**

- To see what you have assigned, visit your Required Education Completion Report > Table View
- If you are part of a large Organization that has multiple sites, often times the education is assigned Corporately. Please check with your Corporate Education Lead to determine what you need to assign, and what they plan to assign.

## - How to Assign Courses to an Individual



### Manage Users

#### What this is used for?

- Retraining / Performance – Assigning education to user makes a user do a course again, even if they already did it
- Should not be used for Orientation
- Is being used for monthly COVID-19 Vaccination Training for those choosing not to get vaccinated

#### To pull reports on Education Assigned to User:

Go to Reports > Education Assigned to User

These assignments are not reflected in your Required Education Completion Report.

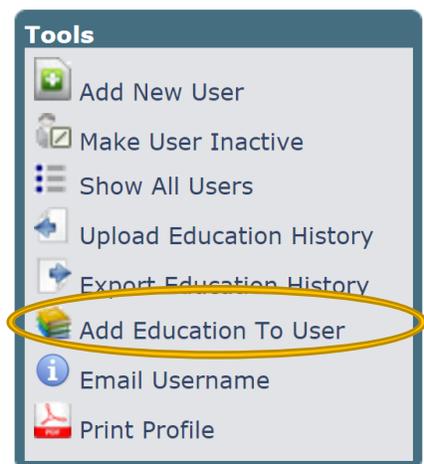
#### Let's get started...

On your Home Screen, click on **Manage Users**

Click on the staff member's name

Click on **Add Education to User** in the Tool panel on the top right of the screen

Once you have clicked **Add Education to User**, click on the link  Add New Education



Start to type the name of the course in the search field provided. The system will generate a list of potential titles and click on the title you wish to assign. It will put it start a list below, and you can continue to search and add other courses. Type in the passing percentage you wish the person to achieve to pass.

Select Courses(s):	<input type="text" value="Search for course..."/>
	Health and Safety - WHMIS 2015: An Introduction to the Global Harmonized System by Surge Learning Inc. Score Needed to Pass Test if Applicable: <input type="text" value="90"/> %
	Health and Safety - WHMIS 2015: Part 2 GHS Classification of Hazards, Labels and Safety Data Sheets (A Presentation by Surge Learning) Score Needed to Pass Test if Applicable: <input type="text" value="100"/> %

Select the date in which you would like these courses to be completed by.

To do this, click on the date to pull up a Calendar.

Select Courses(s):	<input type="text" value="Search for course..."/>
	H&S - Occupational Health and Safety Awareness - WHMIS Part 1 and 2 WHMIS Regulation and GHS Developed by Surge Learning December 2019 Score Needed to Pass Test if Applicable: <input type="text" value="90"/> %
Required Date	<input type="text" value="2021/09/30"/>
	<input type="button" value="Submit"/>



Using the calendar, select the month and date this course will be due.

Click **SUBMIT** to save.

Staff will see the course assigned to them in My Courses.