Providers' eAcademy® Best Practices Checklist

The following checklist provides beginning recommendations to improve the efficiency of your Providers' eAcademy online learning management system (LMS). Contact arheaume@providers.org to learn more about additional tools, resources, and features not listed here that are available on your LMS.

Users

- ☐ **Usernames follow the same username format**, so there is consistency between user profiles and no duplicates between active and inactive usernames
    - o *Employee ID numbers, email addresses, or another format unique to the individual (avoid first initial + last name, it can be easily duplicated which will result in an error)*
- ☐ **All users have email addresses saved to their profile** to receive important reminders and notifications from the system about their training progress
- ☐ **Professional licenses and certifications** are saved to user profiles to make finding CEUs and license renewal easier
- ☐ **Supervisors are assigned the appropriate user role** (report management vs. enrollment management vs. user management)
- ☐ **Customize User Profile fields** to fit your needs. Consider utilizing the "Custom Field" options in user profiles to help further refine filters on reports and more easily assign trainings
- ☐ **Set up an integration between Relias and your HRIS**, if applicable
    - o *Note: will require a one-time fee from Relias*
    - o *The integration allows for user profiles to be updated automatically on a nightly basis, saving significant administrative time and ensuring up to date employee data*

Hierarchy

The Hierarchy is the tool on your site that dictates supervisory access through connecting supervisors to the staff that they oversee. It is very important to have a hierarchy structure that reflects the structure of your organization, so that supervisors are able to manage the staff they oversee effectively.

- ☐ **Hierarchy levels are clearly labeled and regularly updated** to be consistent with the structure of your organization
- ☐ **All users are assigned to a primary hierarchy level** (Unassigned users: 0)
- ☐ **"Notifications Recipient" is designated** on each hierarchy level, can be a supervisor or administrator
    - o *Allows for supervisors/administrators to receive email summaries of their staff's upcoming trainings and will notify them if action needs to be taken by them on something in the system. You must be assigned in the Hierarchy*
- ☐ **Supervisors assigned to the appropriate hierarchy level** so they can oversee their staff
    - o **Assign Additional Hierarchy Access** to supervisors that need to be in multiple hierarchy levels *(located in the User Profile)*
        - ▪ *Note on Additional Hierarchy Access: supervisors with additional access can only be labeled as the "Notifications Recipient" for their primary hierarchy level*

Training Plans

- ☐ **Each training plan is clearly labeled and has a target audience of staff**
  - ○ *Consider creating training plans for different groups of staff based on their department, job title, job function, etc.*
  - ○ *Avoid duplicating training plans, as it causes confusion about which one to assign*
- ☐ **Retire training plans no longer in use** by archiving or deleting them to make your training plan list easier to navigate
  - ○ *Archive training plans by clicking "No" under "Approved for Enrollment" in training plan properties*
- ☐ **Auto-enrollment profiles are set up** to automatically enroll staff in relevant training based on profile attributes
  - ○ *Based on hire date, department, job title, and more, including your custom fields!*

Modules

- ☐ **Create custom modules.** Track in-person events or employee requirements, host virtual events and build your own custom, agency-specific courses
- ☐ **Know how to preview full courses**, and make sure supervisors know how to get summary information about courses
- ☐ **Ensure staff are aware of all the benefits of the platform,** including how to access elective courses that have CEUs relevant to their professional licenses

Reporting

- ☐ **Administrators and supervisors know how to run various reports** on the Relias system
  - ○ *The Course Completion History Report is a good place to start – it is the most popular and widely used across the Providers' eAcademy network*
- ☐ **Develop reports, save for repeat use, and automate monthly/weekly reports** to administrators and supervisors
- ☐ **Share important reports** between relevant users

Settings

- ☐ **Customize and approve all relevant warning emails** to notify staff of upcoming requirements
- ☐ **Customize site language** for most fields so that it accurately reflects the language used at your organization
  - ○ *Ex.: Change "User Location" or "Custom Field 1" to "Cost Center" on User Profiles*
- ☐ **Update your "Contact Email," "Primary Liaison," and "Technical Contact Email"**

Staying Connected

- ☐ **Subscribe to the Provider's eAcademy email distribution list** to receive monthly updates about the program and platform
- ☐ **Join the Providers' eAcademy Admin Listserv**, to stay connected with other site administrators

<u>Looking for additional resources or guidelines to aid in this completing this checklist?</u>
There are video tutorials and step-by-step guides available to you as Administrations through Relias Connect. To access Connect, simply click "Connect" under "Help" on your left sidebar, click "Learning," and you'll be brought to the Relias Learning How-To Manual.

We're here to help! Contact Amanda Rheaume amanda@providers.org or 508.599.2242 if you have any questions or to set up a time to discuss your Providers' eAcademy site.