Certification - Create, View, Edit, or Deactivate a Certification Requirement

Description: In this topic, the user will learn how to create, view, edit, or deactivate a Certification Requirement. Certification requirements are tasks that must be completed before an employee may work. Requirements can either be recurring or non-recurring. Recurring requirements are certifications like CPR that expire after a certain duration of time and must be renewed to keep the certification current. A non-recurring requirement is one that the organization only requires the employee to present once, such as a driver's license or passing a background check.

Role Required: Super User

Permission Required: Training Admin

Create a Certification Requirement

- 1. Log in to personal profile
- 2. Click Settings on the main menu
- 3. Click Training on the submenu
- 4. Click Certification Requirements on the flyout menu
- 5. Click Actions
- 6. Select Add New Certification Requirement from the drop-down menu
- 7. Complete the Add New Certification Requirement form wizard
 - a. Requirement Name (required): Create a name for the requirement
 - b. Target Profile Type (required): Select Employee or Client
 - i. Requirements are typically for the employee but may be used to require something from the client as well
 - c. Requirement Description(required): Add a description of the requirement
 - d. Non Recurring Requirement (required)
 - i. Select Yes if the requirement is non-recurring (only occurs once) and proceed to step e URL.
 - ii. Select No if the requirement is recurring (expires and must be renewed to stay current). The fields for custom duration and
 - reminders must be completed.
 - 1. Custom Duration(required):
 - a. If no, enter Valid Duration Months. This is the amount of time before the requirement must be renewed (i.e., a license or certification expiration).
 - b. If yes, proceed to step 2 Expiration Reminder Days
 - 2. Expiration Reminder Days(required): The number of days before expiration that reminders will be sent to the employee and/or supervisor.
 - a. The message template must be enabled for the system to generate reminder notifications. See Message Templates Admin Guide to learn more.
 - 3. Expiration Reminder Frequency (Days) (required): The number of days the reminder will be sent after reminder notifications begin. The employee and/or supervisor will be informed when it is the final reminder.
 - The message template must be enabled for the system to generate reminder notifications. See Message Templates - Admin Guide to learn more.
 - 4. URL (optional): Add the URL link to the certification training. The URL can link to a video player for video training or to an outside organization that offers training such as the Red Cross.
 - 5. Course Reference (optional): Add an optional course reference number if using the DCI LMS (learning management system). This is the Online Training section of the dashboard.
 - 6. Hire Grace Period (Days) (optional): The amount of time an employee has to complete the certification requirement after the service account is created
 - a. Please note: This certification requirement must be associated with a certification template to be enabled 7. Status (required): Select Active or Inactive
 - iii. Click Save and Yes to confirm

View, Edit, or Deactivate a Certification Requirement

- 1. Log in to personal profile
- 2. Click Settings on the main menu
- 3. Click Training on the submenu
- 4. Click Certification Requirements on the flyout menu
- 5. Enter the requirement name in the filter and click **Search**
- 6. Click anywhere in the Certification Requirement row to open and view the details page
- 7. Click Actions
- 8. Select Edit Certification Requirement from the drop-down menu
- 9. View and make edits in the Edit Certification Requirement form wizard
 - a. To deactivate the certification requirement, change the status to Inactive.
- 10. Click Save and Yes to confirm

Related articles

- Certification Create, View, Edit, or Deactivate a Certification Requirement
- · Certification Add to or Remove Certification Requirements from a Certification Template
- Training Module Admin Guide
- Set up Certifications Video
- Manage Profile Certifications Video