

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.
 - a. 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](#)

