Certification - Link Certification Templates to an Object or Entity

Description: In this topic, the user will learn how to link Certification Templates to objects or entities that require them. Certification templates can be linked to cost centers, funding accounts, service codes, programs, employees, or clients. When creating links, use the highest-level link to minimize the number of links in the system. For example, link to a cost center instead of a service code.

*Please note: Certification Templates can also be added directly to the object or entity when creating or editing it.

Role Required: Super User

Permission Required: Training Admin

Hierarchy of Linking (Largest to Smallest)

- Cost Center - All employees in one cost center
- Service Code - All employees punching against the service code selected, regardless of the client or program.
- Master Program Account - All employees working in the selected program or group service
- Client Profile - All employees working with the selected client
- Funding Account - All employees providing a specific service to a specific client
- Employee Profile - One employee

Link a Certification Template to an Object or Entity

1. Log in to personal profile
2. Click **Settings** on the main menu
3. Click **Training** on the submenu
4. Click **Certification Templates** on the flyout menu
5. Enter the template name in the filter and click **Search**
6. **Click anywhere in the certification template row** to open the details page
7. Click **Actions**
8. Select **Add/Remove** from the drop-down menu for the object to link the certification template to:
    a. **Add/Remove Service Code**
    b. **Add/Remove Accounts** (master program and funding account)
    c. **Add/Remove Cost Centers**
    d. **Add/Remove Profiles** (client and employee)
9. The Add/Remove form wizard will appear
10. Use the search field or scroll through the **Available** table to find the object/entity to link
    a. Select the object or entity and use the right arrow to add to the selected table template
    b. Use the double right arrow >> to add all existing objects or entities to the selected table template
11. 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