Training Records Explained

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Training Page Explained

Keeping track of Training and Certificate updates and renewals for each Caregiver can be complicated. Both the Caregiver and the Manager can easily keep on top of deadlines and expiration dates on the **Training Page**. Here you will find all training details. You can easily see what is complete or what is missing.

With alerts, you will be reminded in advance when a certificate is set to expire, giving you enough notice to schedule a renewal.

Adding Training records to Carer profiles also makes it easy for Managers and Admins to see who is up-to-date and who is compatible for Clients requiring certain types of work.

It's simple to add a training record, so **Let's Get Started.**

Benefits of the Training Page

✔ Organize Training Documents

✔ Set Review or Expiry
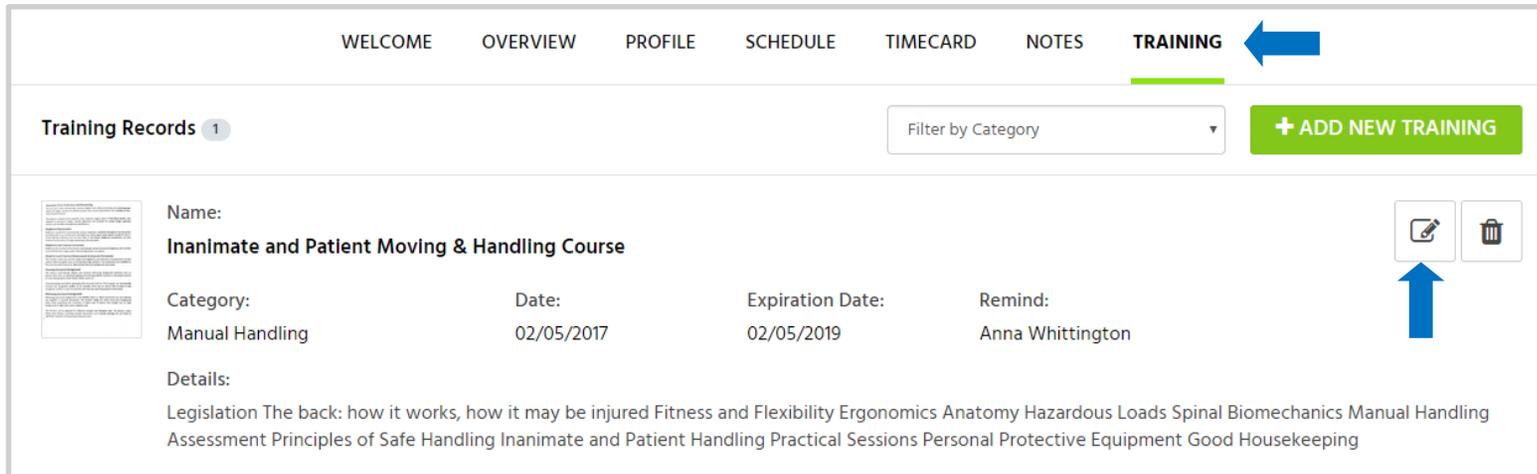
✔ Reminders

Find Training Records on Your Profile

Navigate to your **Profile** and then **Training.** Browse the list or use the dropdown menu to **Filter by Category.**

Edit or Remove an Exisitng Training Record

Need to make a change to an existing Training record? Click on ✏️ and edit the text as necessary.

When finished select Save Training.

To Delete a Training record from your profile, select 🗑️ and then choose Yes, Delete it!

Adding a New Training Record

Have a new training record or certificate to add? Start by clicking on **+Add New Training**

- Type in the **Name of the Training** and choose a **Category** from the dropdown menu.
- Type the date or use the calendar to add the **Date** of completion and **Expiration date.**
- Type in Details related to the training

To add **Documents** like a certificate, select **+Attach File** and choose a file from your computer. Click **Open.** When finished, select **+Save Training.**

Add new Training

Name of training:
Inanimate and Patient Moving & Handling

Category:
Manual Handling

Date:
02/05/2017

Expiration Date:
02/01/2019

Details:
Course Content:
Legislation
The back: how it works, how it may be injured
Fitness and Flexibility
Ergonomics

Send reminder to:
Mary Casey   Month before Expiration Date

+ Add new Alert

Documents:

Attach File   Cancel   SAVE TRAINING

If you wish, **Set an Alert** to remind you or a Manager when the certificate will expire. Select **+Add new Alert**. Then choose the alert recipient's **Name** from the dropdown menu and when to send the alert.

Want to remind more than one person? Simply select **+Add New Alert** again and add another person.