Manage Learner Records

This section is quite comprehensive and forms an integral part of all *learning*-related modules in the Signify HR system. In short it boils down to a history of qualifications, courses or any other training an employee went through prior to or while in a company's employment

It is important to note that this entire module is highly configurable. Almost all fields as well as whether they should be mandatory or not, can be set up according to a client's specifications.

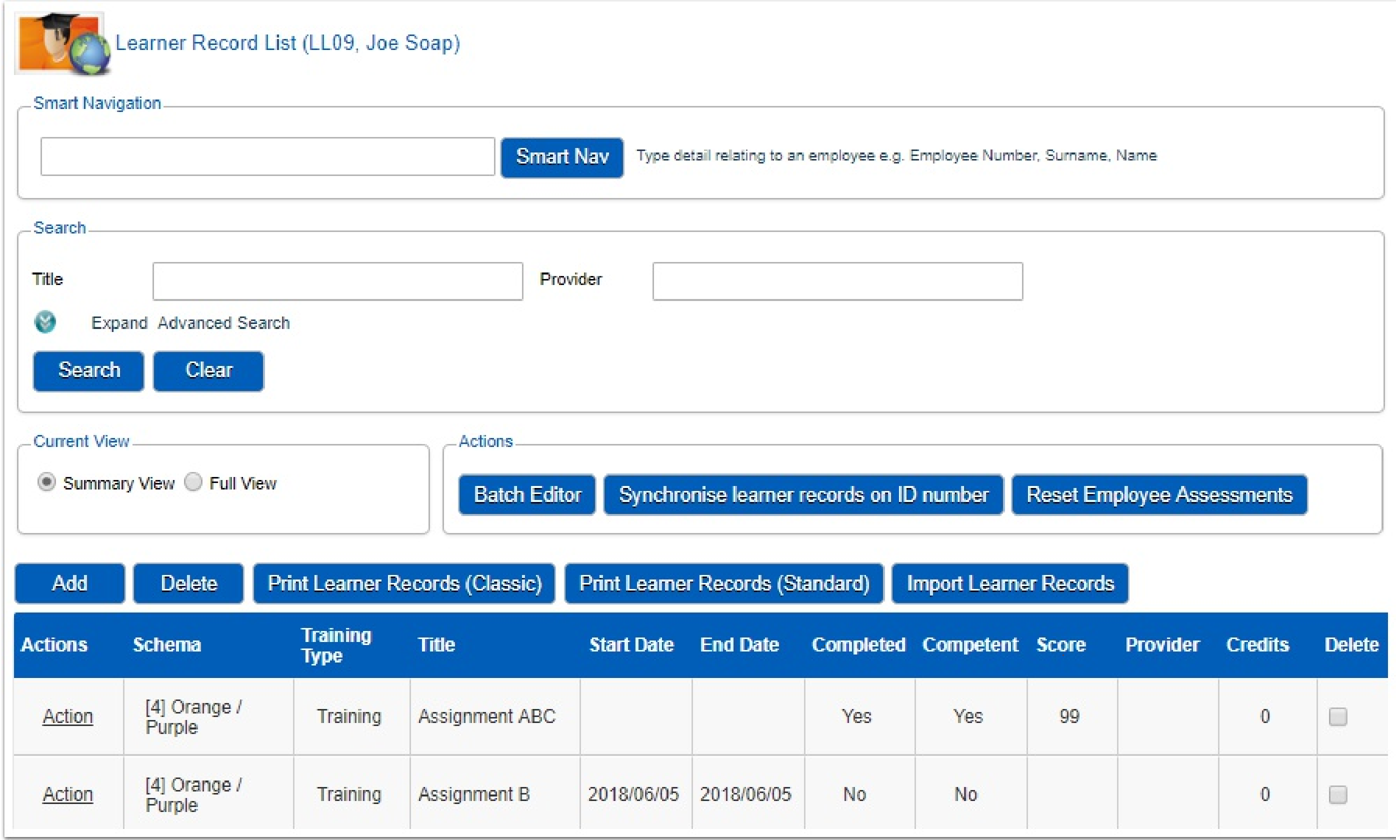
The following are sources for Learner records:

- Events that are attended by an employee.
- Learning pathways (in their totality)
- Individual steps on pathways
- Programmes (comprising a number of courses)
- Assessments
- Manual inputs by administrative personnel
- Manual inputs from the Employee Self Service portal
- Bar-coded imports

How to access the Learner Records

Navigation from the Home page:

- ***System Administration | Modules | Manage Employees | Employee Development | Learner Records*** to open the Learner Record List screen.



The following functionality is available on the Learner Record List Screen:

- **Search**

Basic criteria fields are provided but they can be expanded to allow more options.

- **Summary View & Full View**
    - Full View displays every learner record in its own row. (Showing multiple records should they have come from a skills programme)
    - Summary View is used to group all learner records coming from a skills programme under the title of the skills programme. The option is there to expand the programme to reveal the individual learner records.

- **Batch Editor**

Specify criteria and then easily edit all matching records without having to re-search every time. Some of the functions are:

- Works across employee learning records e.g. see all employees who have done the same course.

- Edit all matching records by hand or specify a change once and apply it to all selected records.

- **Reset Employee Assessments**

If an employee completed an assessment for which a learner record had been submitted, this functionality enables the administrator to manually reset the number of tries used, allowing the employee another try at the assessment.

- **Synchronise learner records on ID number**

In older versions of the LMS system, different employees could have the same ID Number. The **Synchronise learner records on ID number** functionality was used to copy all the learner records to all employees with the same ID Number. Later versions of the LMS does not allow for duplicate ID Numbers, therefore this functionality is now redundant.

- **Import Learner Records**

This functionality can be used to upload a comma delimited CSV file and directly import the selected file to create learner records. The file format is fixed and should be the same as the configuration.

- **Reports**

Learner Record Reports showing completion dates, statuses, scores etc. These reports can be downloaded in PDF format.

- **Add**

Add a new learner record.

- **Delete**

Delete selected learner records.

How to Log (Add) a Learner Record

When the **Add** button is clicked, on the Learner Records List screen, the Log Learner Record screen is opened and the first activity on this page is to determine the type of learner record that is to be added for an employee.

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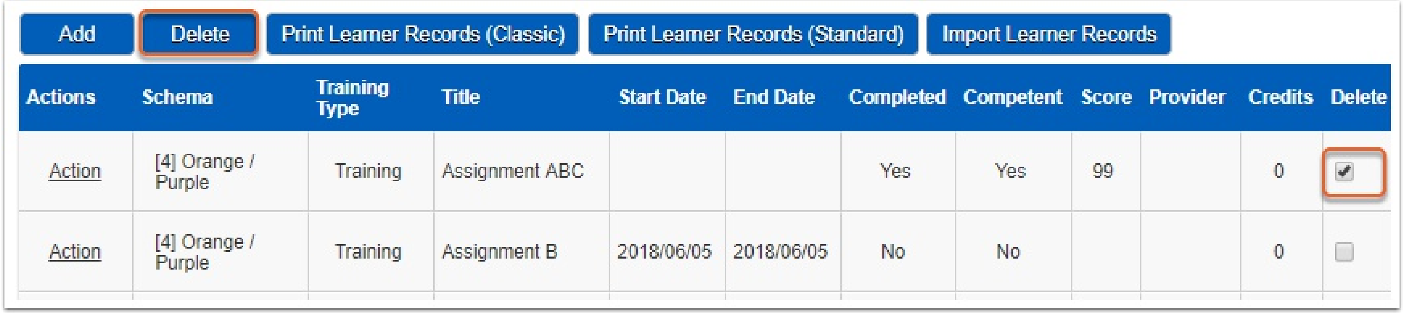
The system will display different fields depending on the type of learner record chosen.

The sections available on the Log Learner Record screen are:

- BASIC INFORMATION:
  - Quality checked: At the top of the **Qualifications** learner record is a checkbox. In cases where learner records are automatically logged from other modules, quality checking is not required. But where records are manually submitted from e.g. the Employee Self Service portal it might be prudent to occasionally quality check and verify the submitted information.
  - Only the Title, Start Date and End Date fields are mandatory when creating a new learner record.
- ASSESSMENT:
  - A learner record can be assessed by an Assessor using this functionality. The following accompanying information is also captured: assessment date, score, number of attempts.
- MODERATION:
  - Moderation results can be captured and stored by the moderator. The following accompanying information is also captured: moderation date, moderation outcome and comments
- COSTS:
  - Multiple costs can be captured per learner record e.g. course cost, travel cost, accommodation cost, printing cost etc.
- DIFFICULTIES ANTICIPATED:
  - A text field to indicate any difficulties anticipated.
- NOTES:
  - A text field allowing for notes to be added to the learner record.

How to Delete a Learner Record

Select the learner record(s) to be deleted and click on the **Delete** button.



Actions	Schema	Training Type	Title	Start Date	End Date	Completed	Competent	Score	Provider	Credits	Delete
Action	[4] Orange / Purple	Training	Assignment ABC			Yes	Yes	99		0	☑
Action	[4] Orange / Purple	Training	Assignment B	2018/06/05	2018/06/05	No	No			0	☐

Additional Actions on a Learner Record

In addition to the above mentioned functionality, the following actions are available with which to add additional information to an existing learner record.

Click on the **Action** link on the employee's learner record to show the dropdown item list.

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VIEW / EDIT DOCUMENTS

- Supporting documentation can be uploaded on the learner record e.g. invoices, POE documents, assessment results, qualification certificate etc.

VIEW / EDIT ASSESSMENTS

- Multiple assessment results can be captured and stored by the assessor. The following accompanying information is also captured: assessment date, competent status, number of attempts and comments.

VIEW / EDIT MODERATIONS

- Multiple moderation results can be captured by Internal and External moderators. The following accompanying information is also captured: moderation date, moderation outcome and comments.
- The Internal moderator can send an email notification to the assessor containing the outcome of the moderation process.

- An External moderator can send an email notification to the External moderator containing the outcome of the moderation process.

COPY TO OTHER EMPLOYEES

Occasionally a couple of employees attend the same course or obtain the same qualification. It would be more efficient to provide the details once and duplicate it to multiple employees. This functionality enables such a quick duplication of records.

DOWNLOAD CERTIFICATE

A training intervention can be configured to allow the printing of certificates. A certificate can be downloaded and printed here.

EMPLOYEE FUNDING

This functionality is available on Qualification type learner records. The functionality manages scholarship information on the learner record. Details pertaining to a current or completed scholarship can be captured in these forms:

- Detail:
  - Start and end dates; Mentor details; Status and Terms and Conditions.
- Periods:
  - Periods of decreased, limited or no funding can be captured as well as whether such a period led to a scholarship re-application. Subjects passed or failed during a period can also be captured.
- Contributions:
  - Any financial contribution to a scholarship from any source can be recorded.
- Expenses:
  - A list of expenses incurred against the scholarship.
- Documents:
  - Supporting documentation on a scholarship e.g. ID documents, invoices, report cards etc.
- Notes:
  - Actions assigned to people; A due date can be added.

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