

# Certification Sets



This feature is available to Site Managers depending on system configuration.

Site Managers can bundle a group of certifications into a set. A certification set is earned once all of the required certifications in the set are completed. Certification sets are printable just like certifications. A certification set also shows an individual's progress towards completion. An individual can expand a certification set to see the certifications that are required to complete the set as well as the completion status of each certification.

The Earned Date of a certification set is the date the individual earned the last certification requirement in the set.

ListFilter

Certification Set Name	Completion Progress	Earned Date	Expiry Date	Outputs
General Company Policies	Completed Items: 8 of 12 <div><div></div></div> Started66.67 %	N/A	N/A	N/A

**Description:** Certification awarded for completing policies that are mandatory for all personnel.

**Completion Items Required**  
Minimum To Earn: 12

Item #	Certification Name	Status
1	Documentation and Records Management Policy	Not Completed
2	Corrective and Preventative Action Policy	Not Completed
3	Control of Third-Party Property Policy	Not Completed
4	Change Control Policy	Not Completed
5	Acceptable Use Policy	Completed
6	Client Focus and Satisfaction Policy	Completed
7	Email and Social Media Policy	Completed
8	Office Security Policy	Completed
9	QA and Continuous Improvement Policy	Completed
10	Training & Development Policy	Completed
11	Data Request Policy	Completed
12	Scope of the Quality Management System Policy	Completed



### Expiry Dates

- The Expiry Date is the earliest date that any one of the certifications in the set expires. If there are no expiries on any of the certifications in the set, then the expiry date is not applicable.
- Earned certifications will continue to contribute to the completion progress in a certification set unless the certification expires. Re-enrolling a user into a product associated with a certification will not reset that certification's status to "Not Completed".

## Create a Certification Set

Follow the steps in [Create a Bundle](#) .

## Certification Set Reports

There are two reports dedicated to certification sets.

- [R111](#)
- [R223](#)