

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 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](#)