

COMPLIANCE REFRESHER COURSEWARE: MANUAL ASSIGNMENT ADJUSTMENTS

Grace Hill's **Compliance Refresher Courseware** allows for seasoned property management professionals who have already completed full essentials training to have access to our refresher courseware. This courseware is shorter, up-to-date mini courses to be completed in-lieu of the full-length compliance courses. If you will *not* be utilizing the Automated Assignment Adjustment option for Grace Hill to adjust the assignments on your behalf, please complete the below recommended steps for adjusting your running assignments to incorporate these refresher courses into your training schedule manually.

IMPORTANT: Prior to completing any adjustments to assignments, Grace Hill recommends you select a date for conducting your assignment adjustments. Communicate to your learners the change in advance and encourage them to complete any in-progress courses with a deadline. Grace Hill has put together sample communication for you to use, as well as an announcement for your learners. A link to these templates can be found at the bottom of this document.

The order of the recommended steps is very important, please complete each step in the order as they appear below.

Step #1 | Remove Full-Length Compliance Course Recurrence

Once a refresher course becomes available, Grace Hill recommends that you remove the recurrence for the full-length compliance course for the regular version of the course, as well as the Maintenance and/or Supervisor versions (if applicable). In turn, these courses will not have to be completed year-after-year by employees. Instead, we suggest that your learners only complete the full-length compliance courses once, if a refresher course is available. To achieve this, you must first remove all currently assigned positions/locations/groups from the full course, remove the recurrence interval, then re-assign as needed. Complete the below steps from the 'Global Settings' of the course:

- From the '**Admin Console**', click on the '**Assignments**' tab, then select the '**Courses**' tab.
- Find and click on the **compliance full-length** course.
- Click on the '**Assign Positions/Locations/Groups**' tabs and make note of all assigned or use the 'Position/Location/Group Assignment Summary' reports to keep track of the assignments that are currently running in your system.
- Select to '**Remove All**' assigned positions/locations/groups, then click '**Save Assignment**'.
- Next, click the '**Global Settings**' tab to select '**No**' for the '**Recurring Event**' status, then click '**Save**'.
- Click back on the '**Assign Positions/Locations/Groups**' tab and re-select the positions/locations/groups that are required to complete the compliance course, then click '**Save Assignment**'.
- Repeat the above steps for any Maintenance and/or Supervisor versions of the compliance course.

NOTE: It's recommended to pull '**Position/Location/Group Assignments Summary**' reports prior to making edits to your course assignments. This allows you to save a listing of all the current assignments running in your system prior to adjusting assignments. (Admin Console application > **Assignments** tab > **Positions/Locations/Groups** tabs > **Position/Location/Group Assignments Summary** button)

***PLEASE ADVISE:** When the assignment is removed, all employees currently in-progress for the full-length course will lose their progress. Communicate in advance to your learners so they can complete their in-progress course. Click the below link to sample communications at the end of this document.*



Step #2 | Add Compliance Refresher as a New Assignment

Complete the below steps to add the compliance Refresher course as a new assignment. It should be due 12 months after the full-length course is due, then set to recur annually:

- From the 'Admin Console', click on the 'Assignments' tab, then select the 'Courses' tab.
- Find and click on the **compliance Refresher** course.
- On the 'Global Settings' tab, set the 'Days to Complete' field to be **12 months after the full-length course is due**.
- Set the 'Recurring Event' to 'Yes', then select the 'Recurrence Interval' to **365 Days** (or 1 Year).
- Confirm the 'Passing Score' is set to your liking and click 'Save'.
- Click 'Assign Positions/Locations/Groups' tabs. Then, select all required office, maintenance, and/or corporate positions, any locations and/or groups for the assignment and click 'Save Assignment'.

Step #3 | (Optional) Add Full-Length Compliance Course as a Prerequisite

After creating the new assignment for the compliance Refresher course, you may want to add the full-length course as a prerequisite. This would require all learners assigned to complete the full compliance course before they're able to complete the refresher course. To achieve this, complete the following:

- Click on the **compliance Refresher** course. From the 'Global Settings' tab, click the 'Set Prerequisite' button.
- Find the full-length course and click the arrow to the right of the course title.
- Click 'Save'.

***IMPORTANT:** If you require some learners to complete the **Fair Housing for Maintenance** course and **not** the full-length **Fair Housing** course, adding the suggest prerequisite above would conflict with the assignments for those learners. **Therefore, you may not want to add the 3-hour 'Fair Housing' course as a prerequisite.** If you have any question about setting up prerequisites, please reach out to Grace Hill's Admin Support Team for more information.*

Step #4 | Add a 'Special Assignment' for Current Employees

Grace Hill suggests that you enter a 'Special Assignment' for all current employees to be completed in 7 Days for the compliance Refresher course so all learners will receive the most recent compliance updates.

- In the 'Admin Console', from the 'Assignments' tab, select the 'Special Assignments' tab.
- Click the 'Add Special Assignment' button, then select the **compliance Refresher** course.
- Enter the 'Assignment Name', for example: FH Refresher (All Current Employees as of [today's date])
- Next, in the 'Completion Date', select the date 7 business days out from today's date.
- Then, select 'Add Assignment'.
- Next, click the 'Add All' button to move all current employees to the 'Assigned Employees' column, then click 'Save Assignment'.

***PLEASE ADVISE:** Some learners who have not completed the original full-length compliance course, or the Maintenance and/or Supervisor version of the course, may have assignments for the original compliance course and the compliance Refresher at the same time. If necessary, admins can adjust these learners' assignments by removing each learner from the special assignment for the refresher or by creating an individual assignment for refresher course with an adjusted due date. If you need assistance with adjusting due dates, please reach out to Grace Hill's Admin Support Team.*

Step #5 | Fair Housing - DPOR Recommendation for Virginia (VA) only

For Virginia employees who need annual Fair Housing certification through DPOR, the length of the refresher course does not qualify for certification (DPOR requires a minimum of 2 hours of training). Therefore, Virginia employees needing this certification will need to continue to take the full-length Fair Housing course annually. To ensure that these employees have this assignment accurately reflected, you will need to setup a group by location for those employees and NOT assign them to the refresher course each year.

- In the 'Admin Console', from the 'Assignments' tab, select the 'Groups' tab.
- Click 'Create New Group' button, then type in the new group name (ex. VA DPOR), and click 'Save'.
- Click 'Manage Locations' and select all Virginia (VA) locations to be included in the Group.
- Click 'Manage Positions' and select all needed positions to be included in the Group.
- Click the 'Assignments' tab within the group profile, then click 'Add Assignment'.
- Choose the full 'Fair Housing' course. Confirm the 'Passing Score' is what you need, then enter the 'Days To Complete' fields and select 'Yes' for the 'Assignment recurs?' and confirm the 'Repeat Interval' is set to 1 Year. Then, click the 'Add Assignment' button.
- Next, click on the 'Courses' tab, find the 'Fair Housing Refresher' course and select the 'Exclude Employees' tab. Filter employees by the VA group name you created, click 'Add All' to move those employees to the 'Excluded Employees' column and click 'Save Exclusions'.

NOTE: If the 'Passing Score' is not appearing as needed when assigning the course from the Group, you can change the setting from the 'Courses' tab in the 'Global Settings' area of the Fair Housing course.

PLEASE ADVISE: The 'Fair Housing Refresher' has not yet been approved by TDHCA (TX), and you may need to set up a group-based Fair Housing assignment for learners who need certification through TDHCA by completing the above steps.

Learner Communication:

[Click here](#) to access the [Learner Communication email templates](#). There are four (4) email templates for each refresher course as outlined below:

- (1) [Pre-Adjustment Communication \(Automation option\)](#) to be used if you decided to have Grace Hill automatically adjust assignments on your behalf. This email to be sent out to learners **prior** to the date that was selected on the request form.
- (2) [Post-Adjustment Communication \(Automation option\)](#) to be used **after** Grace Hill has completed the auto-adjustment assignment process.

- (3) [Pre-Adjustment Communication \(Manual option\)](#) to be used if you decided to manually adjust the assignments yourself and not participate in Grace Hill completing this task for you. This email to be sent out to learners **prior** to making any adjustments manually.
- (4) [Post-Adjustment Communication \(Manual option\)](#) to be used **after** you've manually completed the assignment adjustment process.

Refresher Courses Included:

- Fair Housing Refresher (pages 2-3)
- Drug-Free Workplace Refresher (pages 4-5)
- Workplace Diversity Refresher (pages 6-7)
- Workplace Harassment Refresher (pages 8-9)
- Sexual Harassment Refresher (pages 10-11)