BaysideCEU Facility Membership

Startup Guide

Welcome to BaysideCEU

We are excited to provide your facility with a comprehensive training management system designed to make compliance easier, faster, and more reliable.

This guide will walk you through the full functionality of your BaysideCEU Facility Membership — from onboarding staff and assigning courses to tracking progress, verifying completions, and printing certificates.

By the end of this guide, you will know how to:

- Set up your staff quickly and accurately
- Assign the right training to the right people
- Monitor course progress in real time
- Generate and print completion certificates

Our goal is to ensure you can confidently use every tool available to keep your facility's training organized, efficient, and fully compliant.

Guide Overview

This guide is divided into sections so you can quickly find what you need — whether you're setting up your facility for the first time or managing ongoing training.

1. **Getting Started** – Activating your facility group, creating Group Leader accounts, and accessing the Group Management Dashboard.

2. **Onboarding Employees** – Adding users, managing the Employee Roster, and helping staff enroll in courses.

3. **Assigning Courses and Roles** – Creating roles, assigning courses by role or individual, and understanding where employees take their courses.

4. **Tracking Progress & Completions** – Viewing real-time progress, checking course completion status, and identifying overdue training. As well as Printing and downloading certificates and generating compliance reports.

5. **Account Settings & Support** – Updating facility information and accessing help and resources.

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1. Getting Started

The Group Management Dashboard is your central hub for all facility training activity. It is only accessible through **Group Leader** accounts.

Step 1 – Activate Your Facility Group Account

1. Pay the invoice sent to your email to begin your Facility Membership.

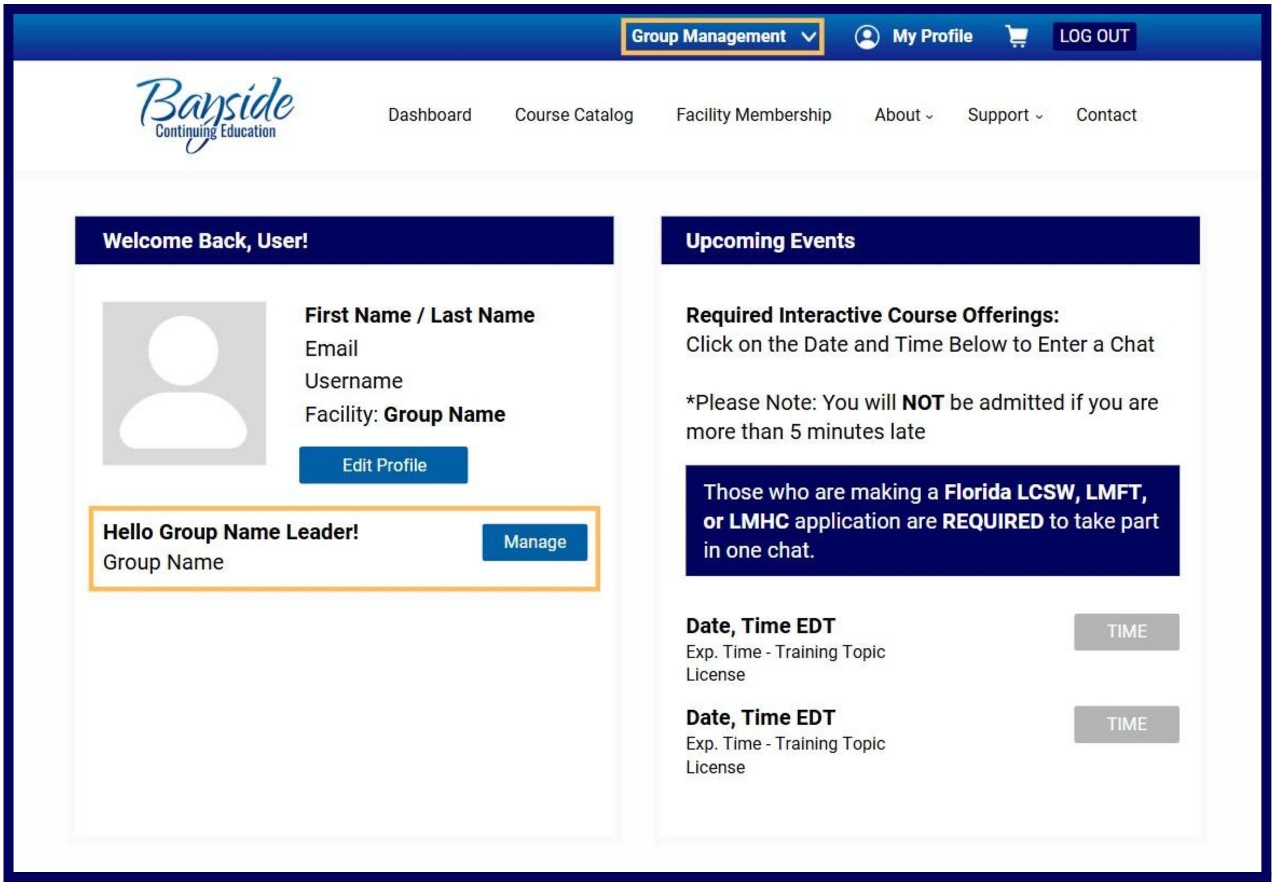
Step 2 – Create Group Leader Accounts

- Any staff responsible for managing employee training in BaysideCEU should have a Group Leader account.
- Group Leaders can add additional Group Leaders once the Facility Group is active.
- To assign Group Leader access:

    1. Log in or create a BaysideCEU account.
    2. Provide BaysideCEU with the account details of the staff who should be Group Leaders.

Step 3 – Access the Group Management Dashboard

1. Log in to your **Group Leader** account.
2. On your main dashboard, you will see a **Manage** button next to your facility name **if** you have Group Leader access.
3. Click **Group Management** in the top-right menu to enter the dashboard.



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2. Onboarding Employees

Step 1 – Open the Employee & Group Leader Rosters

From the Group Management Dashboard, click **Group Management**. You will see two tables:

1. **Employee Roster / Enrolled Users –** All users using a seat in your Facility Group.

    a. First Name, Last Name, Email, **Status**, and **Key** are displayed.

    b. **Status Options:**

    - ***Not Enrolled*** – Invited but not enrolled in the group.
    - ***Not Started*** – Enrolled but has not started any courses.
    - ***In Progress*** – Enrolled and has started taking courses.

c. **Key:** A unique access key is created for each user when invited. This key enrolls them in the group.

2. **Group Leader Roste**r – All users with Group Leader access. Add or Remove from this table.

Step 2 – Add a New Employee

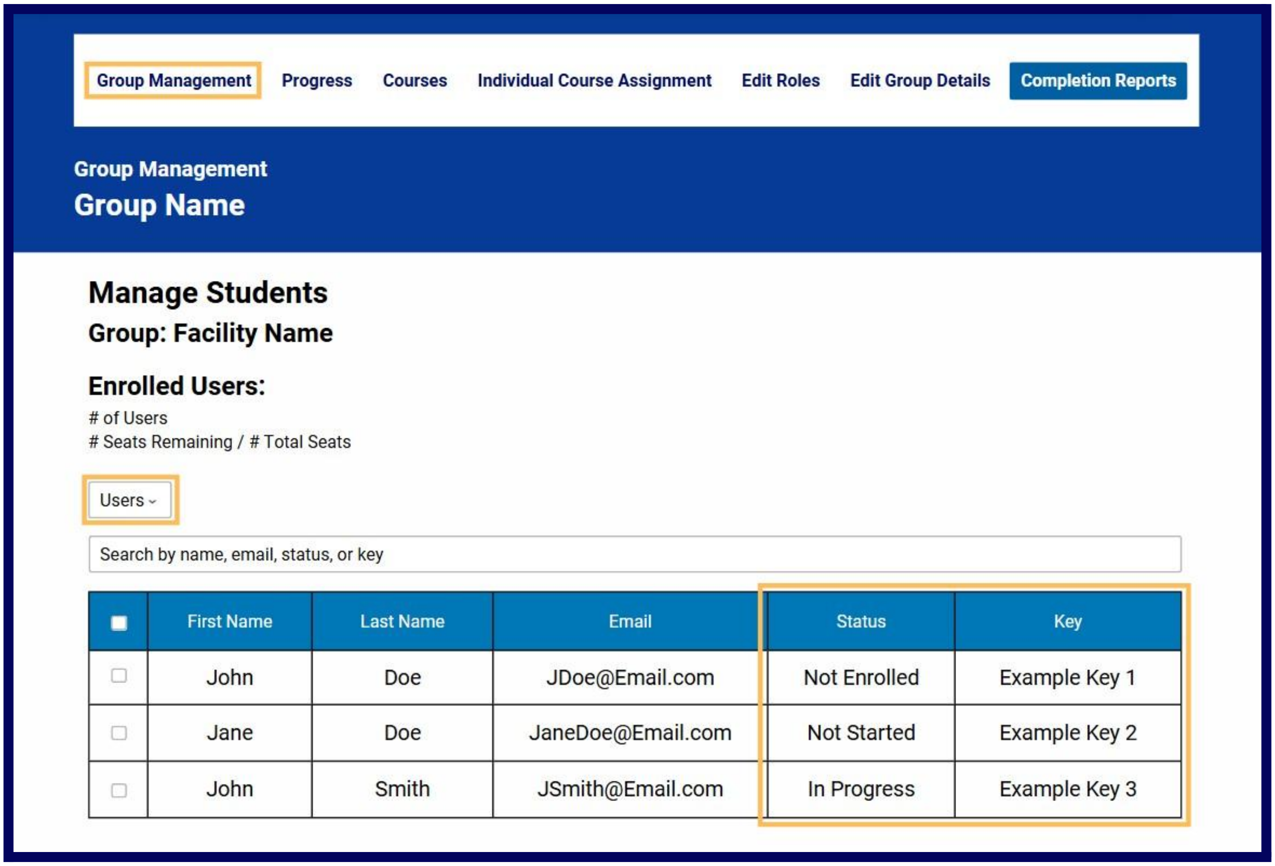
1. Click the **Users** dropdown above the Employee Roster and select **Add One**.

If the employee <u>already has</u> a BaysideCEU account:

1. Enter the email they used to create their account, first name, and last name.
2. They will receive an email with their **Individual Access Key**.
3. Instruct them to log in, go to **Edit Profile** on the Dashboard page, and enter the key in the Partner Access section.

If the employee <u>does not have</u> a BaysideCEU account:

1. Enter their email, first name, and last name they will use for their account.
2. They will receive an email with their **Individual Access Key** and a link to create an account.
3. The link will auto-fill the key in the account creation form.
4. Once their account is created with the key entered, they are automatically enrolled in your group.



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3. Assigning Courses & Roles

There are **two ways** to assign courses:

Option 1 – Assign Courses to an Individual

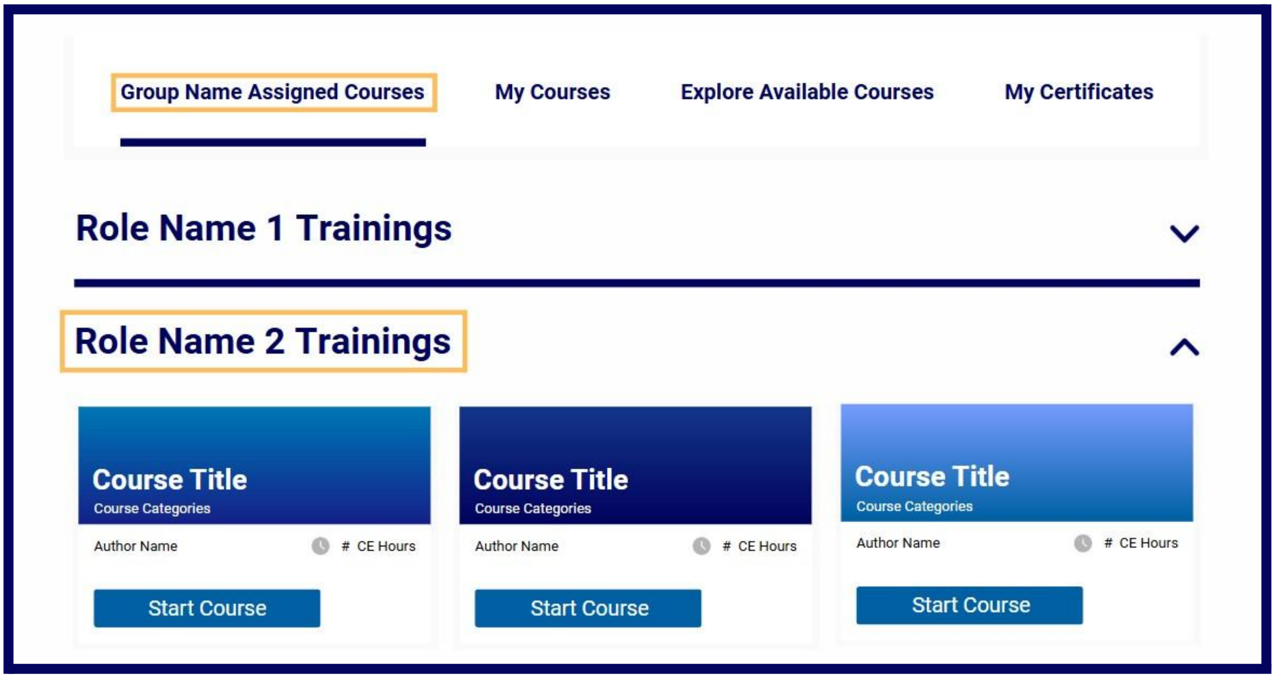
1. From the Group Management Dashboard menu, select **Individual Course Assignment**.
2. Enter the employee's name in the **Select a User** field.
3. Search for and select the courses you want to assign.
   Click **Save Changes**.

Option 2 – Assign Courses by Role

1. From the Group Management Dashboard menu, select **Edit Roles**.
2. Enter the name of the role (e.g., "Counselor," "Nurse," "Direct Care Staff").

3. Search for and select courses for that role.
4. Click **Save Changes**.

The roles appear as drop-down menus containing all assigned courses. This is accessible under each enrolled users Dashboard tab with the name Group Name Assigned Courses:



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4. Tracking Progress & Completions

View Course Progress

From the dashboard menu, click **Progress**.

Filter the table as needed to view:

- Courses taken
- Courses in progress
- Courses not started

Using this tab, you can see: Courses your employees have taken, have progressed in, and have not started

View Completion Reports & Download Certificates

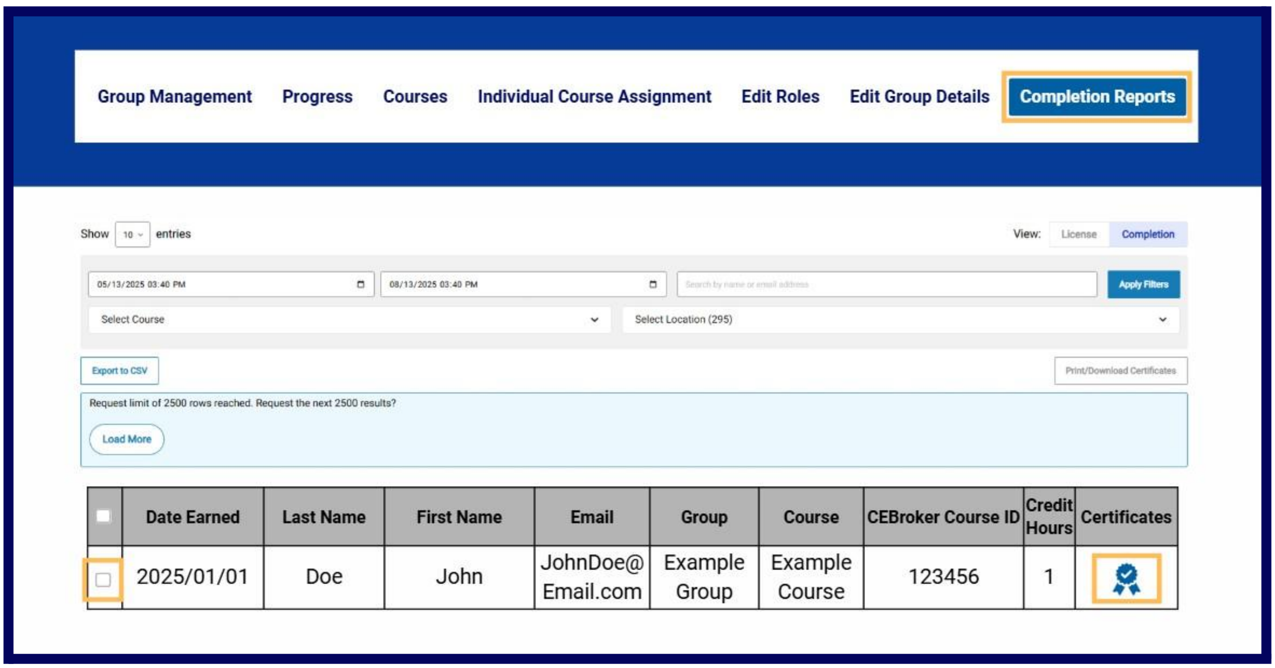
1. From the dashboard menu, click **Completion Reports**.

   This page will display all course completions of the employees enrolled in your group.

2. **Filter** by name, course, facility group, or date.
3. Download certificates by either:

   a. Clicking the **Checkbox** in the **far-left column** of the table, then clicking Print/Download Certificates

   b. Clicking the **Certificate Icon** in the **far-right column** of the table



5. Account Settings & Support

Update Facility Information

From the Group Management Dashboard, click **Edit Group Details**, input your needed changes and select **Save Changes Need Help?**

- **Email Support:** ContactUs@baysideceu.com
- **Text Support:** (407) 264-9800

You're Ready to Go!

That's it — you now have everything you need to manage your facility's training with BaysideCEU. From onboarding staff to assigning courses, tracking progress, and printing certificates, you should feel confident navigating the system and keeping your team compliant year-round.

Thank you for choosing BaysideCEU as your training partner. We're proud to support your facility's mission and look forward to helping you keep compliance simple, fast, and reliable.

BaysideCEU Facility Employee

Startup Guide

Welcome to BaysideCEU

We are excited to provide your facility with a high-quality and relevant coursework to meet your required state-statutes.

This guide will walk you through the full functionality of your BaysideCEU Facility Membership — starting from account enrollment, all the way to completing a course and viewing the certificate.

Guide Overview

This guide is divided into sections so you can quickly find what you need.

1. **Creating Your Account / Facility Group Enrollment** – Courses will not be available until you have an account and that account is enrolled in your Facility Group.

2. **View Assigned Courses** – Once you are enrolled in your Facility Group, courses will become available to you at no cost. Check to see if your HR / Compliance Director has assigned coursework for you.

3. **View Your Certificates** – After you have completed a course and passed the final quiz with a 70% or higher, you can view your certificate in your My Certificates tab.

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6. Creating Your Account / Facility Group Enrollment

The first step in using BaysideCEU as an employee of a Facility is to enroll yourself into the Facility Group.

Step 1 – Acquire Individual Access Key

If you have been invited to join your Facility Group, your employer will have sent an email to you through the Group Management Dashboard. **This email contains an Individual Access**

Key. If you already have an account, or still need to create one, the first step to enrolling yourself in your Facility Group would be to collect this key.

Step 2 – Create an Account (If you have an existing account, go to Step 3)

If you **do not** yet have a BaysideCEU account, there is a link in the email that sent your Individual Access Key to bring you to the account creation page. Follow that link, the **Individual Access Key** will be input for you.

Alternatively, you can navigate to BaysideCEU.com, click **Create Account** at the top-right, and input the **Individual Access Key** in the first prompt.

Step 3 – Enroll an Existing Account

If you **already have** a BaysideCEU account, there is **no need** to create another to enroll yourself in the Facility Group. Simply click **Edit Profile** on the **Dashboard** and input the **Individual Access Key** in the **Partner Access** tab. Click **Save Changes** and you will be enrolled.

7. View Courses & Assigned Coursework

Once you are enrolled in your Facility Group, courses will become available to you at no cost. First, you should check to see if your HR / Compliance Director has assigned coursework for you. If there is not any assigned coursework, then you should contact your employer for more information.

Step 1 – View Assigned Coursework

While logged into your account that is enrolled in the Facility Group, click **Dashboard** then scroll down to the Dashboard tabs. The first tab should say **Group Name Assigned Courses**. This contains dropdown menus that have been created by your HR / Compliance Director.

Step 2 – Select Your Drop-Down Menu

These roles are named by your HR / Compliance Director to describe which employees should take the courses within. For example, All Staff should be taken by All Employees. Click your role and assigned coursework will appear.

Step 3 – Start Your Courses

To begin taking your courses, select **Start Course** under the course you would like to begin. For credit, pass the final quiz with a 70% or higher.

8. View Your Certificates

After you have completed a course and passed the final quiz with a 70% or higher, you can view your certificate in your My Certificates tab.

Step 1 – Navigate to the My Certificates Dashboard Tab

Click Dashboard then scroll down to the My Certificates tab.

Step 2 – View Your Certificates

This tab displays all of your completed courses and earned certificates. Simply select the course you'd like the certificate of.

BaysideCEU Audit IQ

Startup & How-to Guide

Welcome to BaysideCEU

BaysideCEU's Audit IQ system is designed to help facilities automatically track their employees' compliance. Once your Facility has set up Audit IQ, you will be able to see when an employee **last** took mandated trainings, when they will **next** need to take their trainings, and have employees **automatically notified** when they are required to take a training.

This guide will walk you through the full functionality of the Audit IQ system by BaysideCEU from start to finish so you know exactly how to use the system efficiently, greatly **reducing** your compliance-related workload.

By the end of this guide, you will know how to:

- Create and Edit **Roles** to divide staff by training requirements
- Assign Employees to Roles so they take the correct coursework
- Setup **Course Schedules** to track course completions and due dates (automatic notifications)

Guide Overview

This guide is divided into sections so you can reference each section based on your needs

6. **Group Management Dashboard** – Accessing the Group Management Dashboard from a Group Leader account

7. **Creating and Editing Roles** – Assigning courses into roles to divide employees based on their mandated requirements

8. **Assigning Employees to Roles** – Assign employees to the previously created roles for course scheduling and course organization purposes

9. **Course Scheduling** – Setup course scheduling based on Role or Individual User to track course completions and due dates.

10. **Compliance Tracking** – View real-time progress, check course completion status, and identifying overdue trainings.

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9. Group Management Dashboard

The Group Management Dashboard is your central hub for all facility training activities. It is only accessible through **Group Leader** accounts.

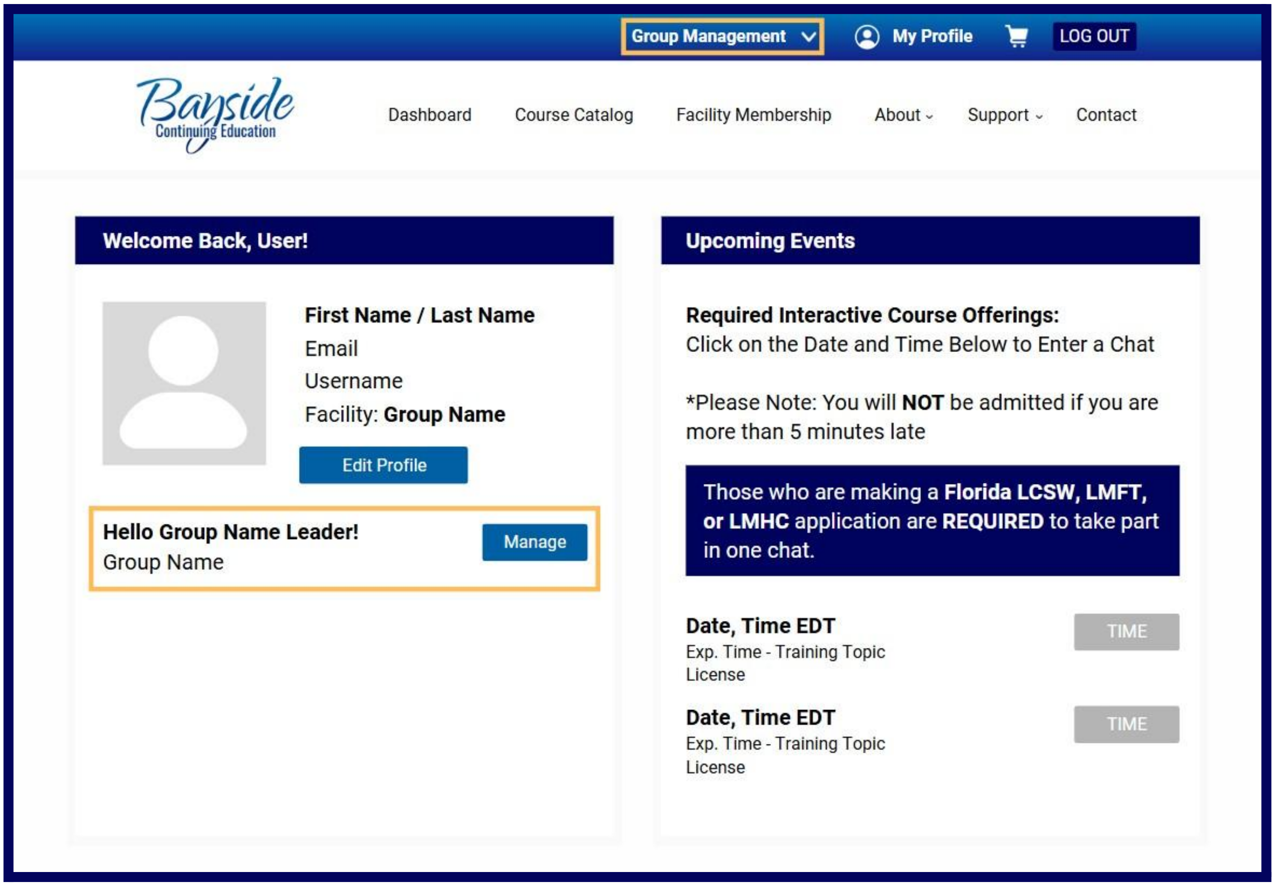
Step 1 – Create Group Leader Accounts (IF YOU DO NOT HAVE A GROUP LEADER ACCOUNT)

- Any staff responsible for managing employee training in BaysideCEU should have a Group Leader account.

    1. Create a BaysideCEU account.
    2. Existing Group Leaders can invite other employees to be Group Leaders (or)
    3. Provide BaysideCEU with the account details of the staff who should be Group Leaders.

Step 2 – Access the Group Management Dashboard

4. Log in to your **Group Leader** account.
5. On your main dashboard, you will see a **Manage** button next to your facility name **if** you have Group Leader access.
6. Click **Group Management** in the top-right menu to enter the dashboard.



10. Creating and Editing Roles

Before you begin scheduling any coursework, first you must assign the coursework to your employees. There are 2 ways to achieve this:

Option 1 – Assign Courses by Role

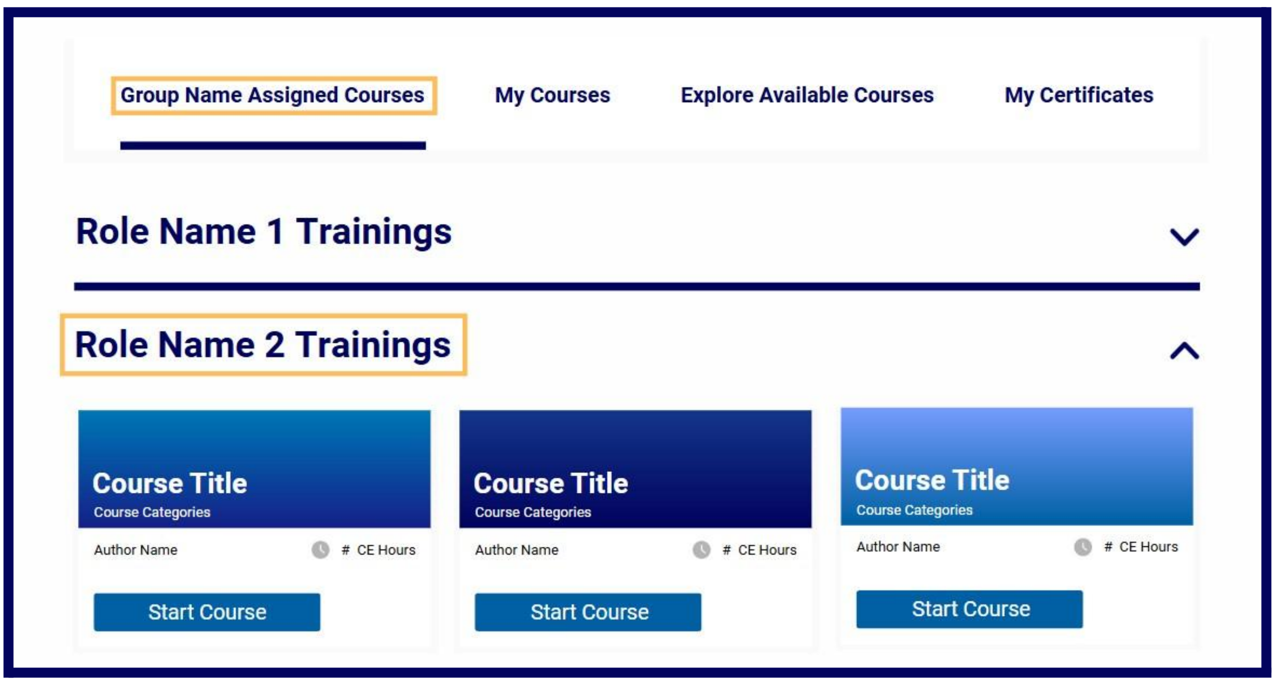
5. From the Group Management Dashboard menu, select **Edit Roles**.
6. Enter the name of the role (e.g., “Counselor,” “Nurse,” “Direct Care Staff”).
7. Search for and select courses for that role.
8. Click **Save Changes**.

The roles appear as **drop-down menus** containing all assigned courses. This is accessible under each enrolled user’s Dashboard tab with the name **Group Name Assigned Courses**.

Option 2 – Assign Courses to an Individual

4. From the Group Management Dashboard menu, select **Individual Course Assignment**.
5. Enter the employee's name in the **Select a User** field.
6. Search for and select the courses you want to assign.
   Click **Save Changes**.

Courses assigned by Individual Course Assignment will only appear for the employee who was assigned the coursework. They will display under the **Group Name Assigned Courses** tab.



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11. Assigning Employees to Roles

The final step before creating Course Schedules is to assign Employees to their Roles. This way they are assigned courses that match their mandated requirements.

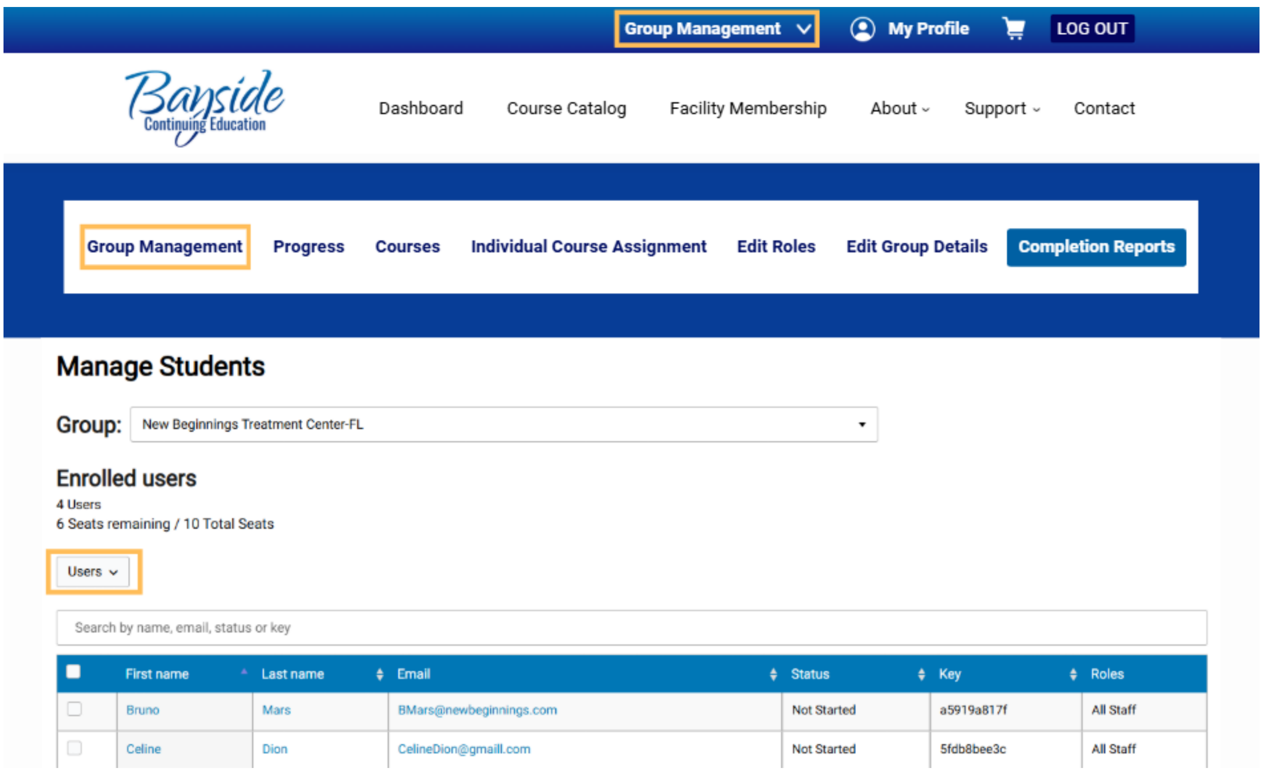
Step 1 – Click Group Management using the Group Management Menu

This will bring you to your Employee Roster, which displays a table of valuable information regarding each Enrolled User. The very far-right of the table displays their assigned Role.

Step 2 – Click the Manage Drop-Down Menu (May display as Users)

Step 3 – Select Bulk Role Edit

In this menu, use the Select Members and Select Roles menus to assign your employees to a role. *For example, Employee 1 & 2 are Nurses, Employee 3 & 4 are Counselors.*



12. Course Scheduling

Step 1 – Click Course Schedule using the Group Management Menu

The Course Schedule menu is where you will be able to set up **Rules**, which are customizable tracking parameters you can use to track coursework based on Roles or Individual Employees. There are two ways to setup Rules:

Option 1 – Rule Type: By Role

This option is to assign coursework based on **mandated requirements** for a role.

For example, **Counselors** are required to take **Aggression Control** yearly. **Rule Type: By Role** allows you to create a Course Schedule for Aggression Control for all of your employees who are assigned to the Counselor Role, activating tracking for when their last individual completion was, when their next completions are due, and automatic notifications to each individual.

Option 2 – Rule Type: By Individual

This option follows the same functionality but is instead assigned by Individual instead of Role. Allowing you to divide certain coursework to employees based on individual requirements.

Step 2 – Input Rule Parameters

1. Rule Name: The name or label of the Course Schedule (*Ex. Counselor Yearly*)
2. Rule Type: How the Rule applies (*By Role or By Individual*)

Step 3 – Assign Coursework and Occurrence

Click Add Course and select any number of trainings to assign to the individual or role.
From there, set **how often** the course is required to be completed by mandates (*Ex. Yearly*). And finally, select how many days before the due date you would like your employee to be **notified via email**.

(*All Group Leaders can also be notified of upcoming due dates under **Edit Group Details***)

Step 4 – Click Add Rule to Finalize Course Schedules

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13. Compliance Tracking

Step 1 – Click Compliance using the Group Management Menu

This is where all existing Course Schedules will be displayed. This menu allows you to view that an employee is **fully compliant**, when they have a **training due**, and finally if an employee is **non-compliant** due to a missing training.

There are 3 existing Course Status:

1. **Compliant** – The employee is up to date on this training
2. **Due Soon** – The employee is due for this training based on your set parameters
3. **Overdue** – The employee is non-compliant and has not taken this training

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That's It!

Important Note: Employees will still have access to all coursework they wish to take through Explore Courses. This is a tracking tool, not a course access tool.

We hope you find BaysideCEU's Audit IQ system valuable in simplifying your compliance processes and supporting your team's training needs. If you ever have questions or need assistance, our support team is here to help. Thank you for trusting BaysideCEU!