

## How to create a policy acknowledgment in the BirdDogHR Learning Management System

1. As an admin, you are able to add an acknowledgment to a course OR create a course where the main purpose is to have your employees acknowledge a new policy, document, etc. This is a fantastic tool if there is a new policy each year you must require employees to sign off on or after they review a training video or course they must acknowledge they comprehend the content.
2. First, it would probably be best to create a training type around this course type. Below are names that have been used, however this is unique to your organization! Or, if this is tied to an online course or video you can use your existing training types. **To add training types you need to go to Account Admin -> LMS Setup -> Training Types**
  - a. Policy Acknowledgments, Training Acceptance Forms are common training types.

### Step 1.

As an admin, go to LMS -> LMS Admin -> Courses -> Add new course

### Step 2

Once you determine what training type this is, you will want to create a course title, description, and any other fields you would like to track (duration, categories, etc)

The screenshot shows the 'Add new course' form in the BirdDogHR LMS. The form is titled 'Course Details' and includes the following fields:

- Course Title (required):** A text input field with a placeholder 'Course Title'.
- Training Type (required):** A dropdown menu with '[Nothing Selected]'.
- Course Number:** A text input field with the placeholder 'To be assigned...'.
- Course Reference Number:** A text input field with the placeholder 'Course Reference Number'.
- Course Version Number:** A text input field with the placeholder 'Course Version Number'.
- Duration:** Two input fields for 'Hours' and 'Minutes'.
- Category:** A dropdown menu with 'Nothing selected'.
- Course Description (required):** A rich text editor with a toolbar containing options for File, Edit, Insert, View, Format, and Table. The toolbar includes icons for undo, redo, bold, italic, underline, strikethrough, bulleted list, numbered list, link, unlink, image, and code. The text area is currently empty.

On the left side of the form, there is a sidebar with the following links:

- > Advanced Settings
- > Prerequisites
- > Instructors
- > Catalog Restriction Rules
- > Acknowledgement

At the bottom right of the form, there are two buttons: 'Cancel' and 'Save'.

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### Step 3

Once you determine what type of course this is, you may need to put something in the launch button URL area. This could be a powerpoint, video, etc. The launch button URL is made for training type that is not instructor led (does not require employees to go somewhere to take their course) and not an online training type (SCORM 1.2, AICC, TinCan). For a full list of acceptable online content please ask your Customer Success Manager or the Customer Care Team.

**-If a launch button URL, see where to add**

Course Details

Course Title (required)

Training Type (required)

Launch Button URL

Course Number

Course Reference Number

Course Version Number

Duration

Category

Course Description (required)

File Edit Insert View Format Table

Verdana 11pt

Rich text editor toolbar with icons for bold, italic, underline, strikethrough, bulleted list, numbered list, indent, outdent, link, unlink, image, code, and eye.

-If NO content is needed, the purpose of the course is for your employees to sign a new policy this CAN be left blank

### Step 4 – Assign the necessary policy.

On the course creation page, navigate to the bottom of the page. There will be an Acknowledgment tab. You must change the toggle to Yes.

Acknowledgement

Require Acknowledgement  Yes  No

Signature Type  Digital Wet Signature  Typed Signature

Document (required)

Custom Acknowledgement

File Edit Insert View Format Table

Verdana 11pt

Rich text editor toolbar with icons for bold, italic, underline, strikethrough, bulleted list, numbered list, indent, outdent, link, unlink, image, code, eye, and Merge Template.

I acknowledge that I have received a copy of `~~course_title~~`, which describes important information about `~~company_name~~`, and understand that I should consult the Human Resource Department if I have questions.

- Since the information, policies and benefits described here are necessarily subject to change, I acknowledge that revisions to the document may occur.

Require Acknowledgement after Failed Course/Class?  Yes  No

Here you can decide what type of signature you would like for your employees to enter. You can have a combination of both, one or the other, or none.

The, you must select the policy. The document does have to be a PDF and also loaded into your knowledge base to be able to be selected. The knowledge base can be found under your Module Menu in the right hand corner.

Require Acknowledgement:  Yes  No

Signature Type:  Digital Wet Signature  Typed Signature

Document (required): Search for Document

Custom Acknowledgement

File Edit Insert View Format Table

Verdana 11pt Merge Template

I acknowledge that I have received a copy of ~~~course\_title~~~, which describes important information about ~~~company\_name~~~, and understand that I should consult the Human Resource Department if I have questions.

- Since the information, policies and benefits described here are necessarily subject to change, I acknowledge that revisions to the document may occur.

Require Acknowledgement after Failed Course/Class?  Yes  No

If this policy is being added to an Online Course where there is a passing score, you can decide if you would like to require an acknowledgement after a Failed Course / Class.

**If you want to update the verbiage that will show on the acknowledgment screen, you can type above or just use the default text**

### Step 5 (can ignore if the policy is being tied to an OLT or ILT Course)

Since we need to track who now needs to review this new policy, the autocomplete feature **must** be turned on. This can be found under Advanced Settings of the course creation.

Advanced Settings

Cost: Cost

CEU: CEU

Mastery Score: Mastery Score

Reference Materials Link: Reference Materials Link

External Enrollment Link: External Enrollment Link

Date Created: Date Created

Date Updated: Date Updated

Last Review Date: Last Review Date

Author: Author

SME Name: SME Name

Review Frequency: Review Frequency

Training Providers: Nothing selected

Competencies: Nothing selected

Approvals:  Instructor  Training Admin  Supervisor

Autocomplete Course:  Yes  No

Once your employees are enrolled in the course or assigned the course, they will be **required** to review the acknowledgement before this course is added to their training history.

Thank you for enrolling in this course. Your confirmation details are below.

ENROLLMENT DETAILS	
STUDENT McMonigal, Brittni	COURSE TITLE How to add your jobs to your website via the BirdDogHR Code
LOCATION	
START/END DATE 4/3/2019 -	START/END TIME Unspecified
<a href="#">View Training Schedule</a>	

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Withdraw	How to add your jobs to your website via the BirdDogHR Code	Open						Incomplete (Pending Acknowledgement)
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Your employees will select open & sign.

1 of 9 Automatic Zoom

**BirdDogHR**

**Career Page Code**

Details & Instructions

I acknowledge that I have received a copy of How to add your jobs to your website via the BirdDogHR Code, which describes important information about McMonigal Demo, and understand that I should consult the Human Resource Department if I have questions.

- Since the information, policies and benefits described here are necessarily subject to change, I acknowledge that revisions to the document may occur.
- I understand and agree that I will read and comply with the policies contained in this document and any revisions, am bound by the provisions contained therein, and that my continued employment is contingent on following those policies.

Signature (required) [Clear](#)

Type Signature

[Save](#)