User Guide

SURGE LEARNING GUIDE

What this guide contains

WELCOME TO

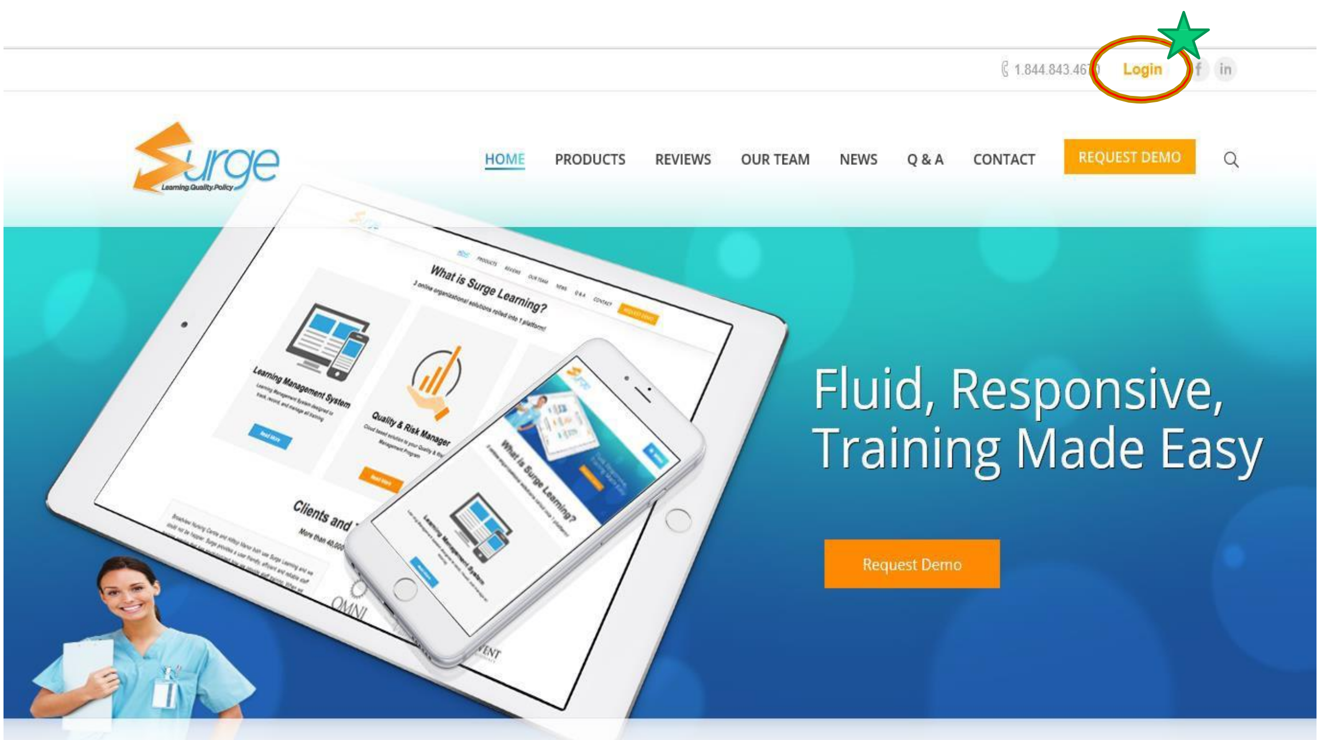
HOW TO ACCESS SURGE LEARNING

To access Surge Learning, please visit the website
www.surgelearning.ca

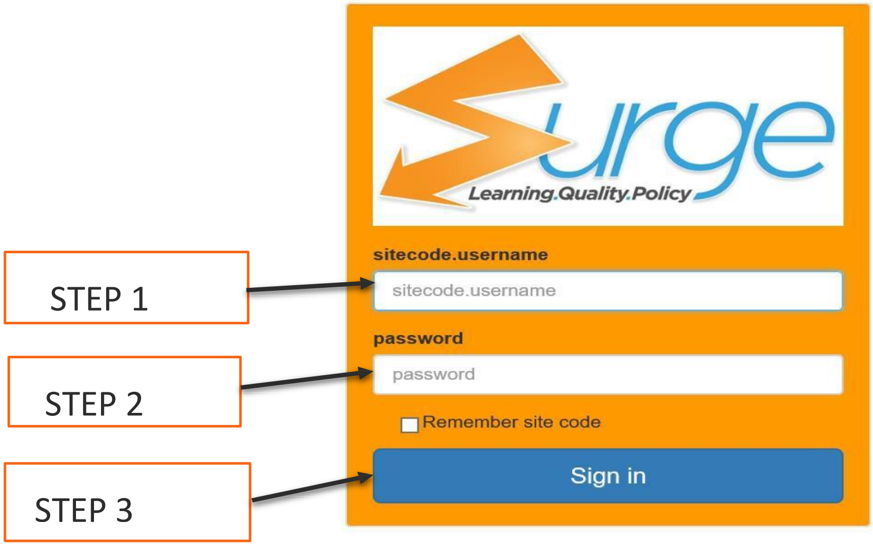
Surge Learning is web-based, therefore you can access it via the web—from your workplace, from your home, from your mobile devices, and any place with accessible Wi-Fi!

If you are using an iPad, iPhone, or tablet we recommend downloading the Puffin Browser APP for optimal performance.

Once you have reached the website, Click **Login** on the top right of our webpage



How to Log In to Surge Learning



STEP ONE: TYPE IN YOUR USERNAME

1. Enter in the site code "**psl**" followed by a period (.)
2. Type the FIRST LETTER of your first name, followed by your whole LAST NAME.

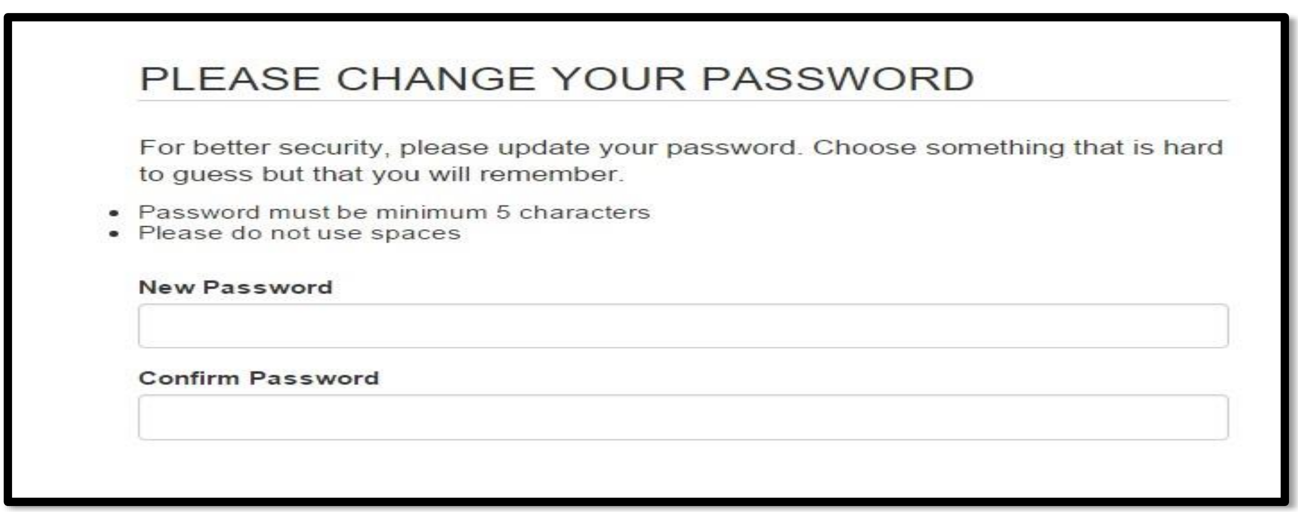
(For Example: Jane Doe would be **psl.jdoe**)

STEP TWO: TYPE IN YOUR PASSWORD

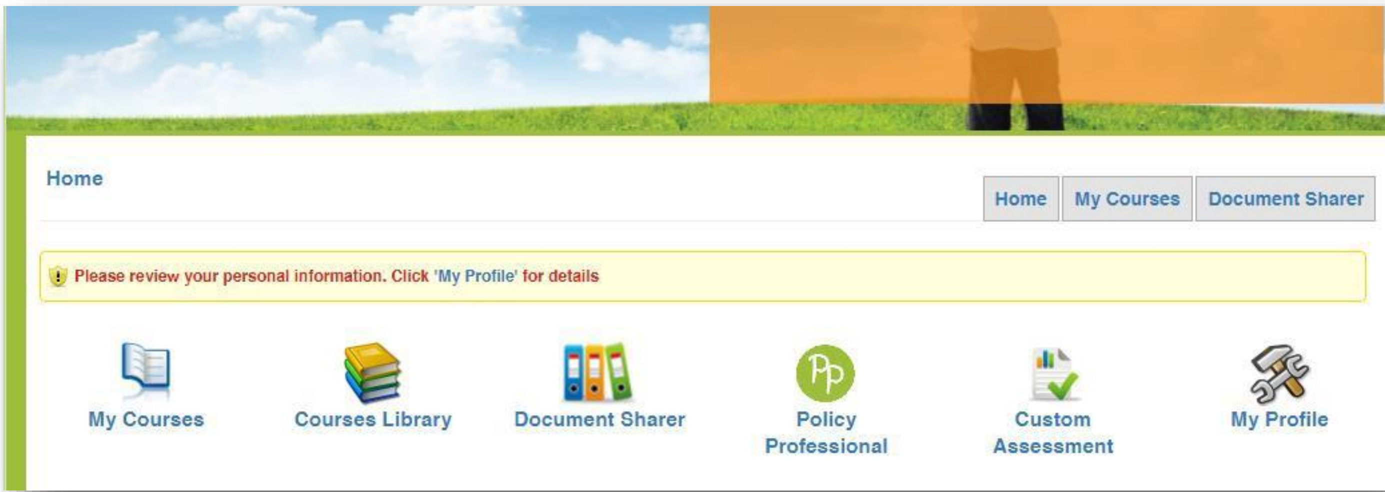
You will be provided with a generic password for your first log-in. Once you log into Surge Learning, you can change the password and create one for yourself that will be meaningful to you. Temporary Password: PSLboard19

STEP THREE: CLICK "SIGN IN"

When you log into Surge Learning for the first time, you may be prompted to change your password. You will not be able to proceed until this step has been completed.



Welcome to Your Home Page!



On your Home page you will see: **A Message Board, alerts for items that need your attention, and various icons where you might go to access assigned education and resources available to you.**

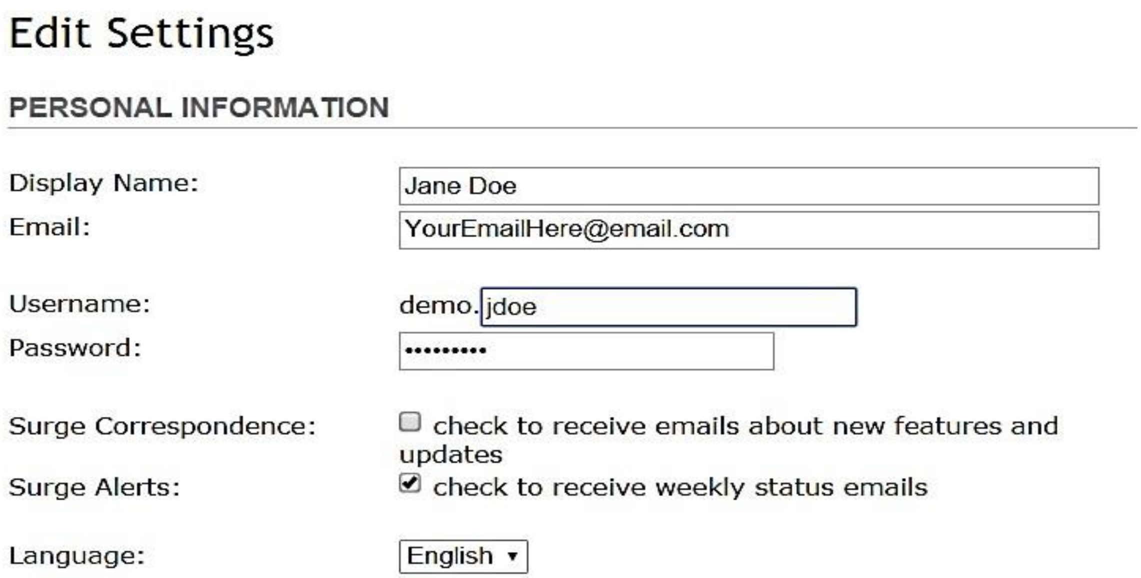
Not sure what things are? This chart will help…

FUNCTION	WHAT IS IT FOR …
My Courses	Courses that have been ASSIGNED to you**, whether to yourself individually or as a department**
Courses Library	Resource Library of **OPTIONAL** e-learning courses
Document Sharer (Manuals)	Resources that you can read at your own pace (ie: Handouts, Policies and Procedures)
Custom Assessment	Identifies your learning goals and provides an evaluation of your organization's staff development program
My Profile	Change your Password and complete a skills inventory
Live Events	Attendance tracking for in-services and instructor facilitated education
Survey	Allows the organization to invite staff to take an anonymous survey to collect feedback and data
Policy Professional	Allows organizations and users to manage policy cycle and workflow

Managing Your Profile

My Profile

1. In your Home Screen, click on My Profile



In this screen you can:

- **Add your email (optional)**
- **Change your password**
- **Check to receive Surge Correspondence (Newsletters, version release updates, etc. - Optional)**
- **Check to receive Weekly Status Emails – A GREAT way to get a snapshot of what's coming due that week, sent right to your email! (Optional)**
- **Update your Skills Inventory (Currently not set up for Board)**

POLICY PROFESSIONAL

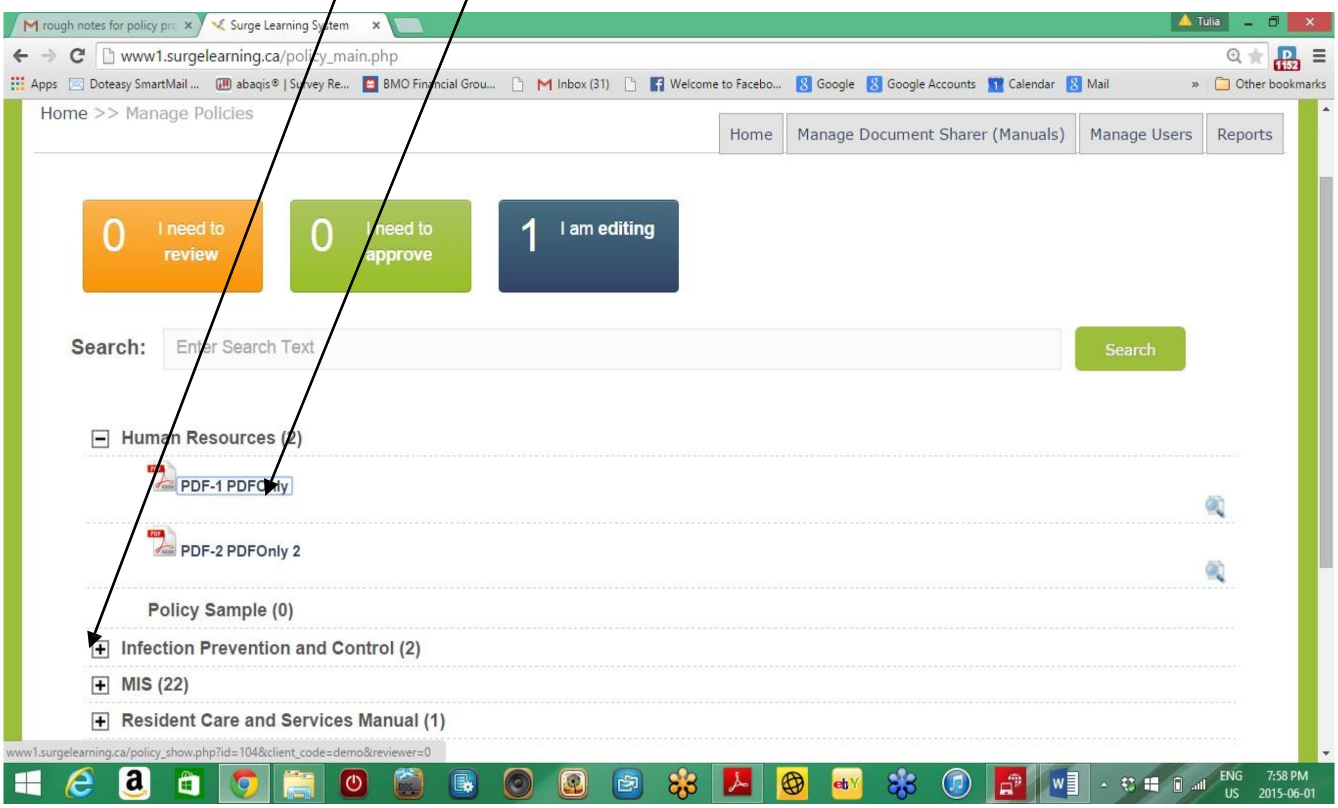
For all User Levels

How to look up a policy – From your home page you will see an icon called Policy Professional. On this page you will see a search bar at the top and a list of all of the manuals your organization has in Policy Professional.

Step 1.

You can click on the plus sign beside the title of the manual that you want to view a policy.

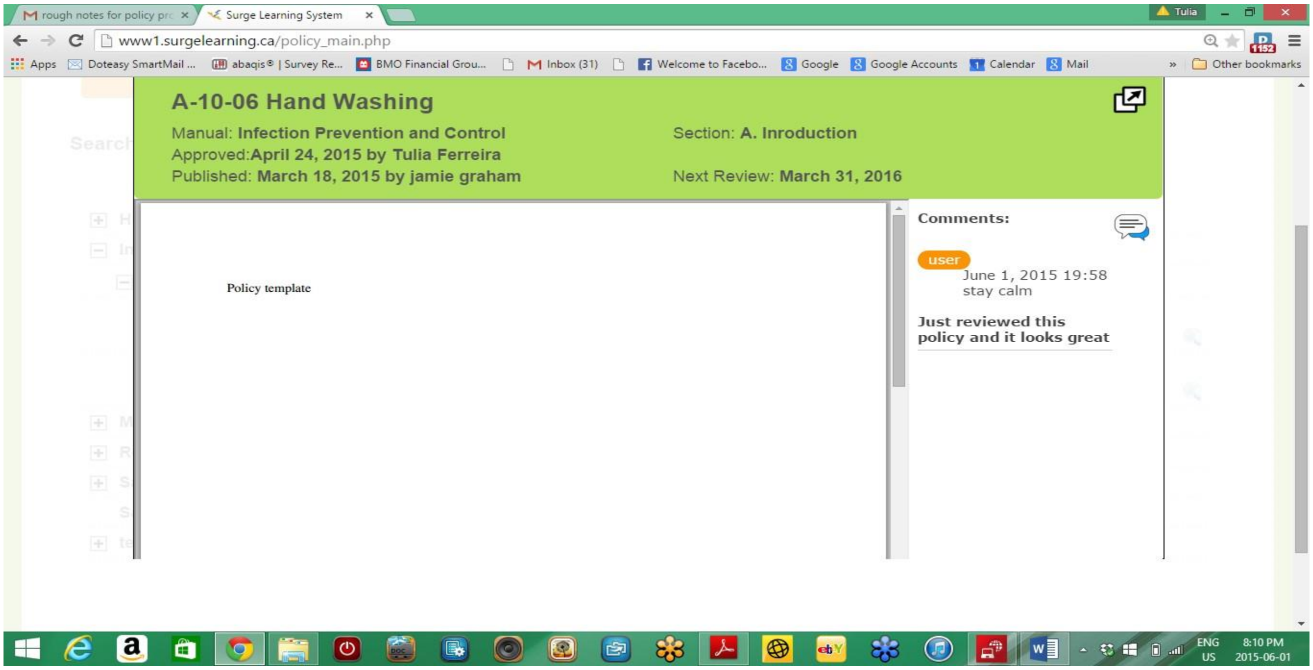
Click on the title of the selected policy or magnifying glass to view the policy



You can also search for a policy by entering key words in the title or description of the policy. Now you see a list of any policies that match your search.

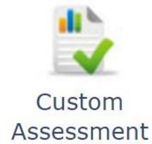
Step 2:

Clicking on the selected policy or the magnifying glass takes you to this page



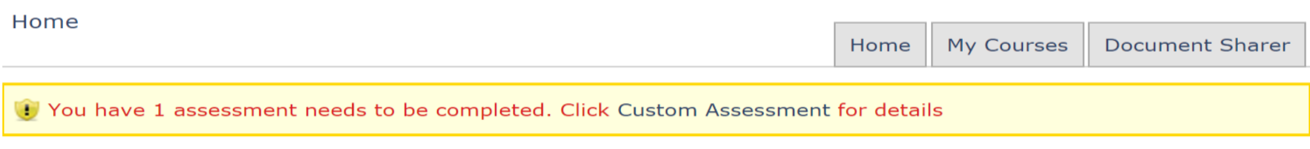
In the upper right corner you will see a comment icon so if you want you can leave a comment. This comment will be sent to the person responsible for approving the policy.

Custom Assessments & Surveys



Q: How will I know if I have a Custom Assessment or Survey to do?

A: *When you log into Surge Learning it will tell you that you have an assessment to do if one has been assigned*



Q: How do I complete it?

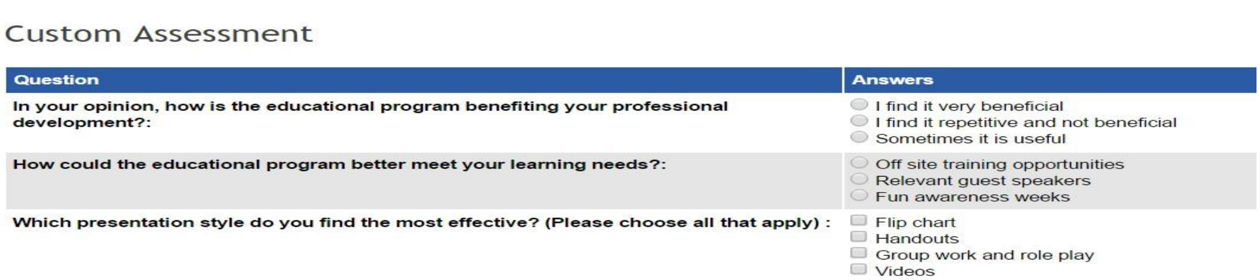
A: *Click on the* Custom Assessment *word in your reminder (see picture above) or click on the icon itself*

Once you have entered Custom Assessment, Click on the name of the assessment. Answer the following questions fully, and click SUBMIT to finish. This helps your organization identify the learning needs of the staff, and evaluate the effectiveness of their Education Program offered to promote staff development.

What is the difference between Custom Assessment and Survey?

Custom Assessments are used for data collection and the names of participants and their responses are known. An example of this would be a Learning Needs Assessment, where you can identify areas that you would like more training on, and your Education Coordinator can see what it is that you would like to learn more about.

Surveys are used for data collection that is anonymous. The Education Coordinator can see how many people were invited to take the survey, how many people participated but, they cannot see who participated in the survey.


Custom Assessment

Question	Answers
In your opinion, how is the educational program benefiting your professional development?:	I find it very beneficial I find it repetitive and not beneficial Sometimes it is useful
How could the educational program better meet your learning needs?:	Off site training opportunities Relevant guest speakers Fun awareness weeks
Which presentation style do you find the most effective? (Please choose all that apply) :	Flip chart Handouts Group work and role play Videos

The Document Sharer

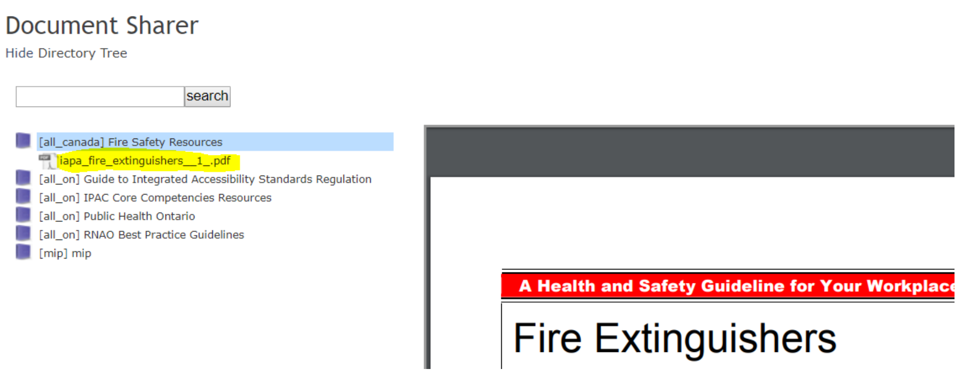
Document Sharer

The Document Sharer shares documents with staff, such as policies and procedures, educational resources, handouts, etc.

This is simply a resource center and there is no obligation to spend time in the Document Sharer, but you can browse the resources available to you as needed.

How to use this tool:

- ✔Click on the name of the folder you want to open
- ✔Click on the title of the document within the folder (see highlighted example below)
- ✔View your document/resource on the right side of the screen

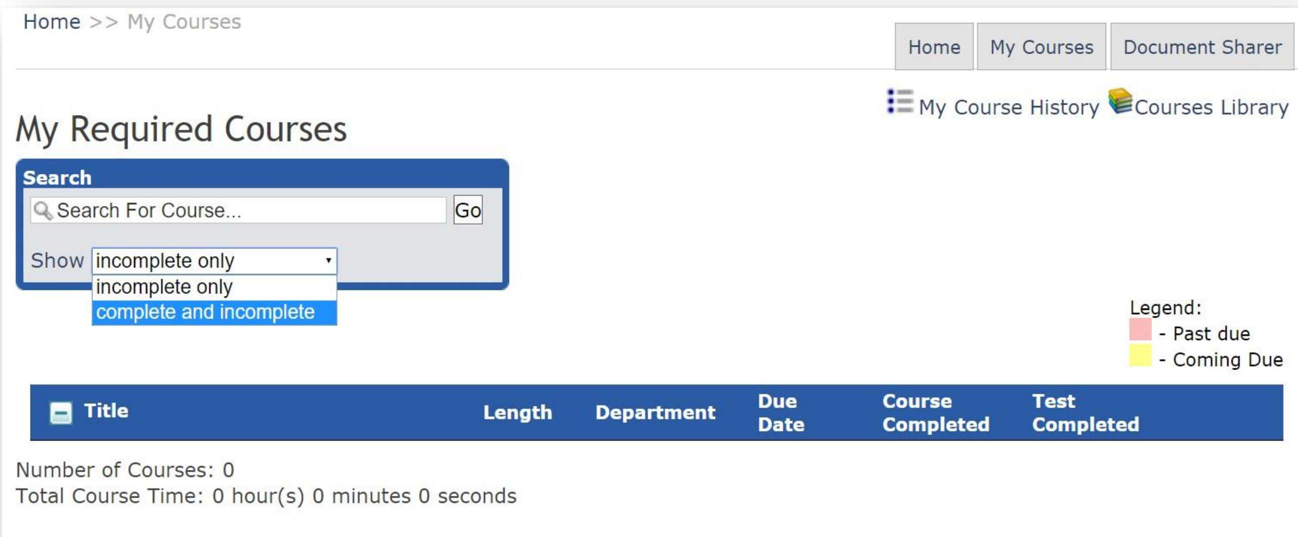


Any mandatory/assigned reading can be found in MY COURSES

Completion of Required Courses

My Courses

When education, policies and procedures are assigned to you, you will find those items in My Courses. These courses may be assigned to All Staff, your specific department, YOU specifically, or they may be recommended as an optional (non-mandatory) course.

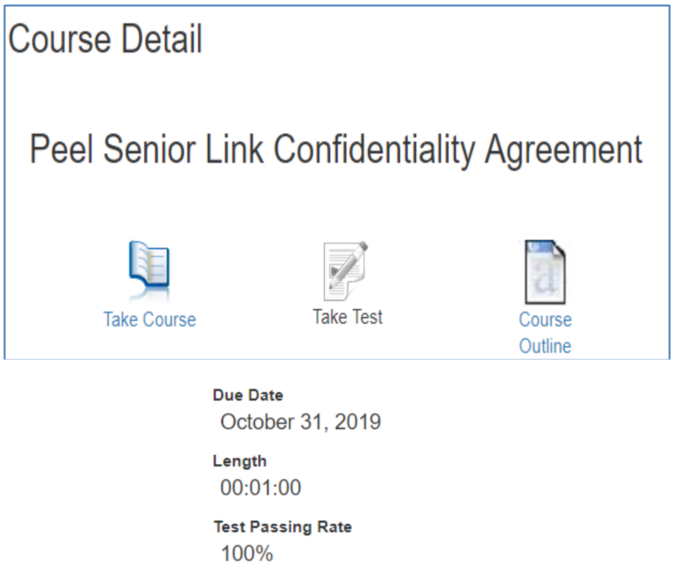


The colour legend on the right of page, helps you identify priority courses:

- **Pink: Courses that are highlighted in pink are Past Due**
- **Yellow: Courses that are highlighted in yellow are Coming Due within a 30 day period**

How Do I Take a Course?

Click on the Course/Policy you wish to take. You will then see a screen that looks similar to this:



Take Course - View the course here. Unless it is a policy, it will be a video with sound. Ensure your speakers are turned on or you have headphones available.

Take Test – Once you have completed the course and you have entered your password to verify completion, you will have access to the test.

Course Outline – May provide information about the course, such as learning objectives and summary of topics.

Due Date - The date the course is to be completed by.

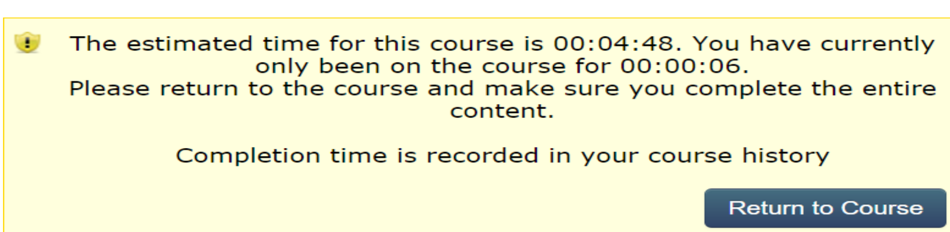
Length – The running time/duration of the video presentation. This does not factor in time to take the test.

Test Passing Rate – The percentage you need to pass the test.

Click on Take Course

Your video/policy will load. Once you have watched the course, click on I have completed this course

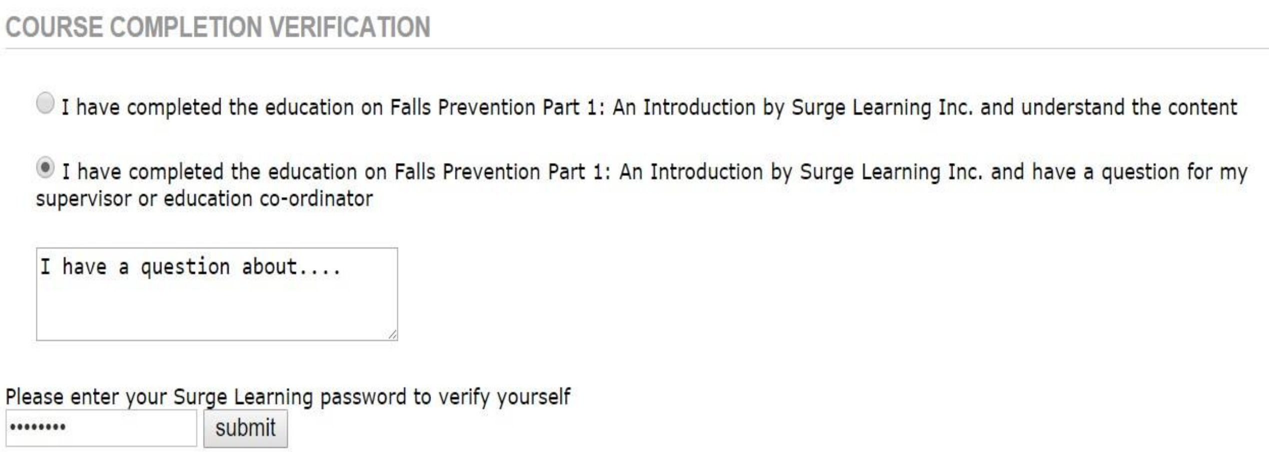
Please watch the course fully. If you try to close the education without watching its full duration, the system will remind you that you have not watched the whole module.



Course Completion Verification

Once you have completed the course and clicked: **I HAVE COMPLETED THIS COURSE**

You will need to verify one of two things, by clicking on one of the options below:



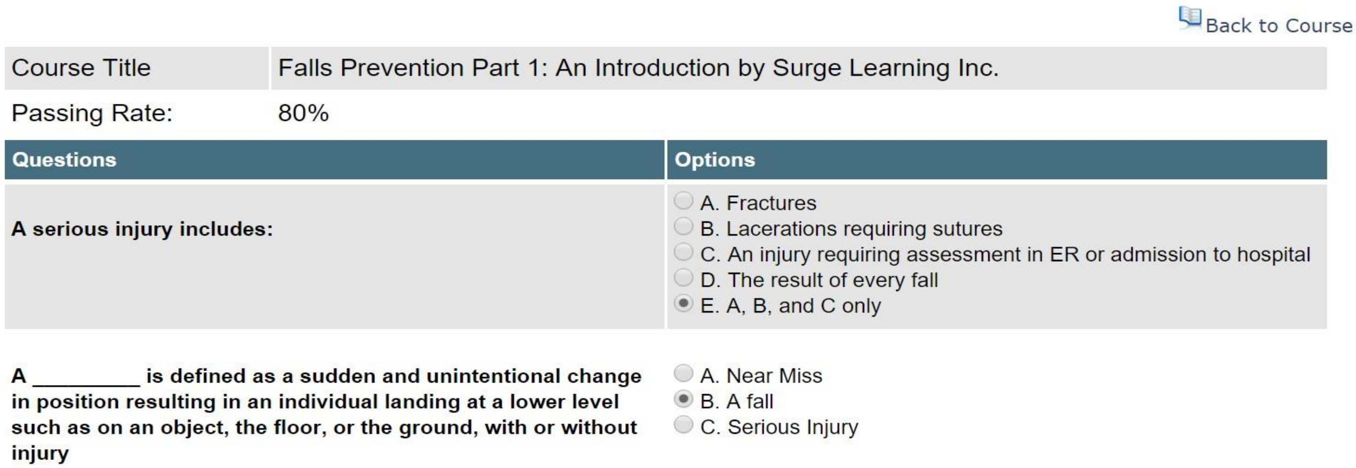
If you selected that you did not understand, you may type in a question in the field provided which will send directly to the

Enter your Surge Learning password and click SUBMIT

Proceeding to the Test

Once you have verified your understanding of the material and signed off on the Course as complete with your Surge Learning, you will notice that the test is now available.

You will notice the passing rate at the top of the screen. This passing rate is set by your organization. For each question, click on your answers and complete ALL questions. **Click SUBMIT** and Surge Learning will mark your test right away!



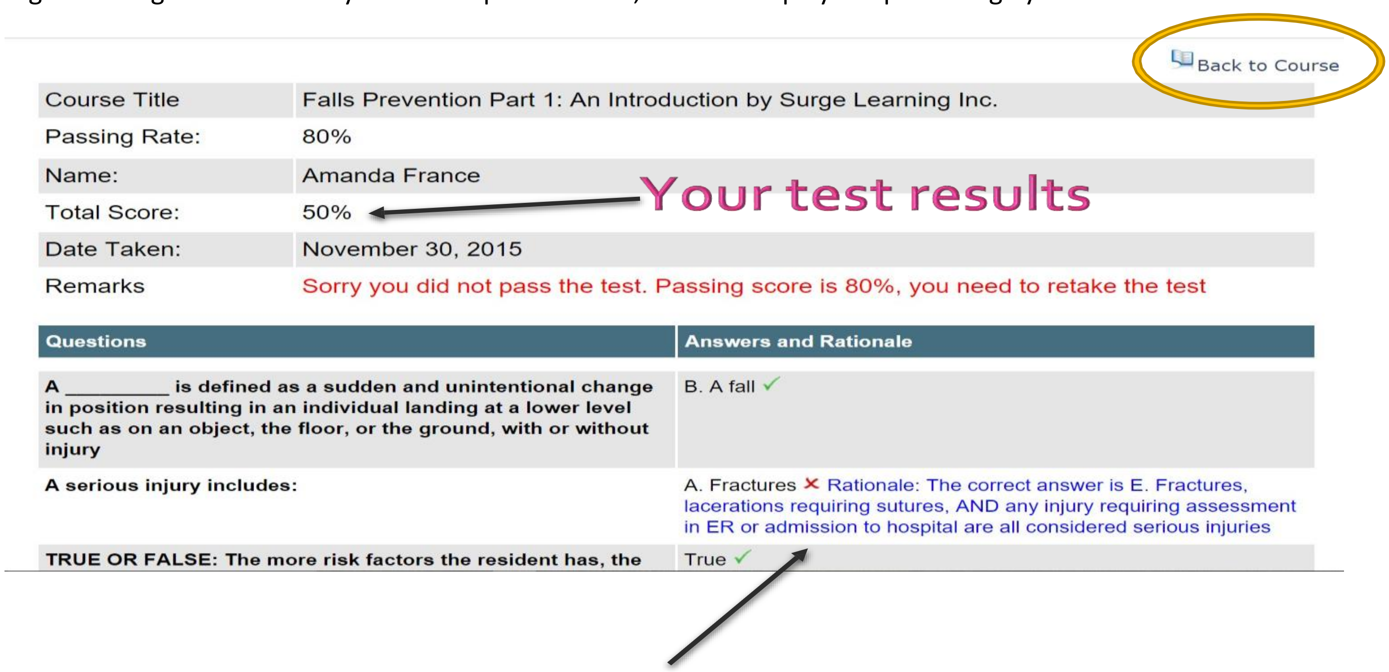
Back to Course

Course Title	Falls Prevention Part 1: An Introduction by Surge Learning Inc.
Passing Rate:	80%

Questions	Options
A serious injury includes:	A. Fractures B. Lacerations requiring sutures C. An injury requiring assessment in ER or admission to hospital D. The result of every fall E. A, B, and C only
A _________ is defined as a sudden and unintentional change in position resulting in an individual landing at a lower level such as on an object, the floor, or the ground, with or without injury	A. Near Miss B. A fall C. Serious Injury

Marking the Test

Surge Learning will indicate if you did not pass the test, and will display the percentage you obtained.



Course Title	Falls Prevention Part 1: An Introduction by Surge Learning Inc.
Passing Rate:	80%
Name:	Amanda France
Total Score:	50%
Date Taken:	November 30, 2015
Remarks	Sorry you did not pass the test. Passing score is 80%, you need to retake the test

Questions	Answers and Rationale
A _________ is defined as a sudden and unintentional change in position resulting in an individual landing at a lower level such as on an object, the floor, or the ground, with or without injury	B. A fall ✓
A serious injury includes:	A. Fractures ✗ Rationale: The correct answer is E. Fractures, lacerations requiring sutures, AND any injury requiring assessment in ER or admission to hospital are all considered serious injuries
TRUE OR FALSE: The more risk factors the resident has, the	True ✓

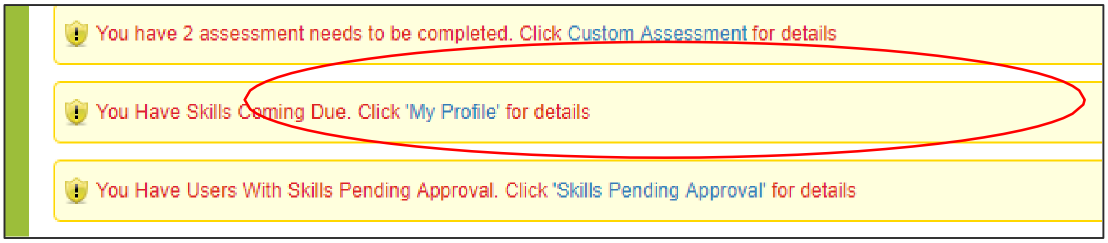
You will be able to see what questions you answered correctly, and which ones were incorrect. If you did not pass the test and you would like to retake it, please click on **Back to Course** on the top right and complete the same steps you did taking the test the first time.

If you need to retake the test, please note: YOU DO NOT NEED TO TAKE THE COURSE AGAIN.... Unless you want to!

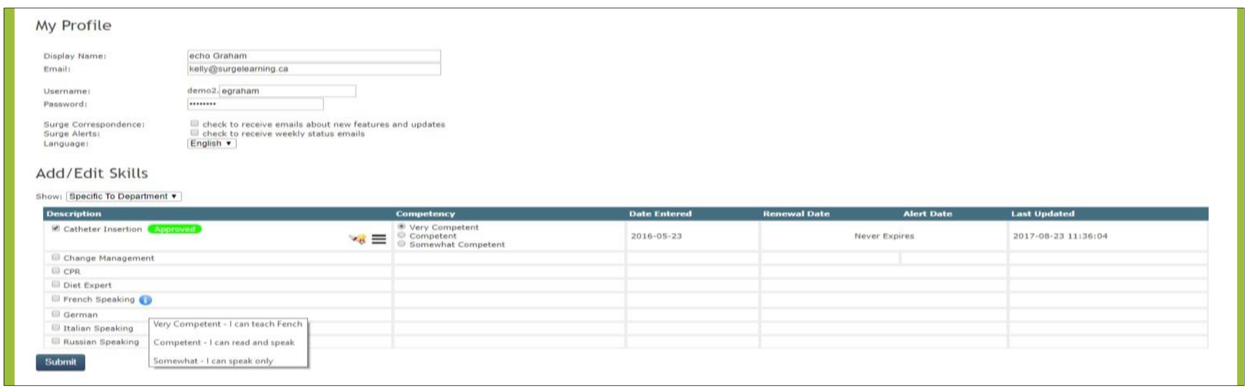
When you have successfully completed the test, a checkmark will appear, indicating it is officially complete.

Skills and Credentials

You will receive a notification on your home page to review your profile and skills when you first create a Surge profile, and when your skills are coming due for renewal.



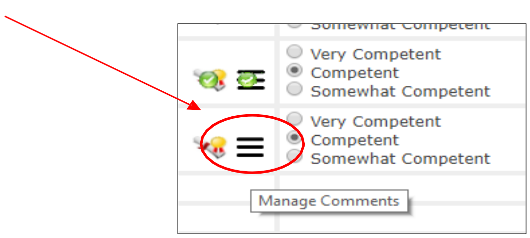
Click on My Profile from your Surge Learning home to add/edit your skills.



Click on the box of the skill you would like to add to your profile. Select whether you are Very Competent, Competent, or Somewhat Competent in that skill.

Hover over the blue I to see a description of the skill.

You can click on the menu icon to add a comment if you like.



You can add and save PDF copies of certificates the same way by clicking on the Certificate icon.

Some skills will show an “Approved” label in **green** right away as they do not require approval from your supervisor. Others will show a “pending approval” label in **orange** as they are pending approval from your supervisor. Once approved, the green label will appear and you will be able to review any comments your managers have added.

TRACKING SKILLS AND CREDENTIALS IN MY PROFILE

In "My Profile" you MAY see a checklist of skills that your Employer has set up for staff to check off if they possess those skills. If you do not see this, your Employer may have decided that the Education Coordinator will be updating these skills themselves for each employee.

- Click on the checkbox for the skill you currently have.
- **To upload a certificate of this skill,** click on the certificate icon . Certificates should be uploaded in PDF format.
- **To add additional notes to this skill, click on the**
- **If you see an** you can hover over it for more information (if applicable)
- In the Competency column, click on the button which indicates your level of competency with that skill.
- **RENEWAL DATE:** If the expiry date appearing on screen is different than the actual expiry date of your skill/certification, you can adjust it as needed.
- **ALERT DATE:** On this set date you will be alerted that the skill is coming due for renewal.
- **PENDING APPROVAL (if applicable):** This indicates that your supervisor needs to review and approve this skill as well.

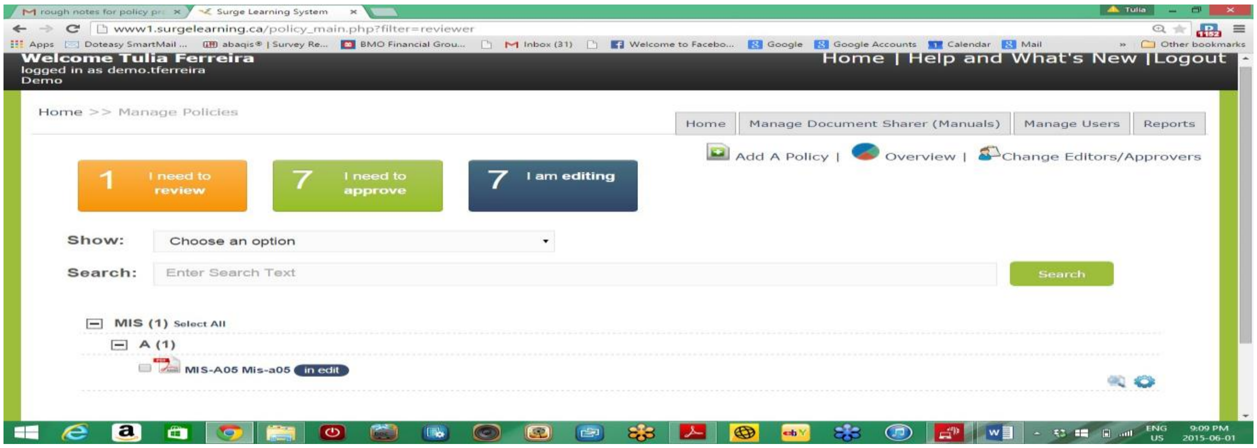
Add/Edit Skills

Show: All Available

Description	Competency	Date Entered	Renewal Date	Alert Date	Last Updated
Butterfly Injection System					
C.A.A.D Pump					
Calculate IV Flow					
Catheter Insertation					
Chest Tubes					
Colostomy Irrigations					
Flush Hickman Line					
French Speaking					
GPA Training Pending Approval	Very Competent Competent Somewhat Competent	2017-09-13	2019-09-13	2019-06-15	2017-09-13 13:48:56

For Managers and Policy Leads

Reviewing Policies: If you are a level that is set to be able to review policies, you will see a reminder on the home page with the number of policies assigned for you to review. Click on the hyperlink, or on the Policy Professional icon. This action will take you to this page.

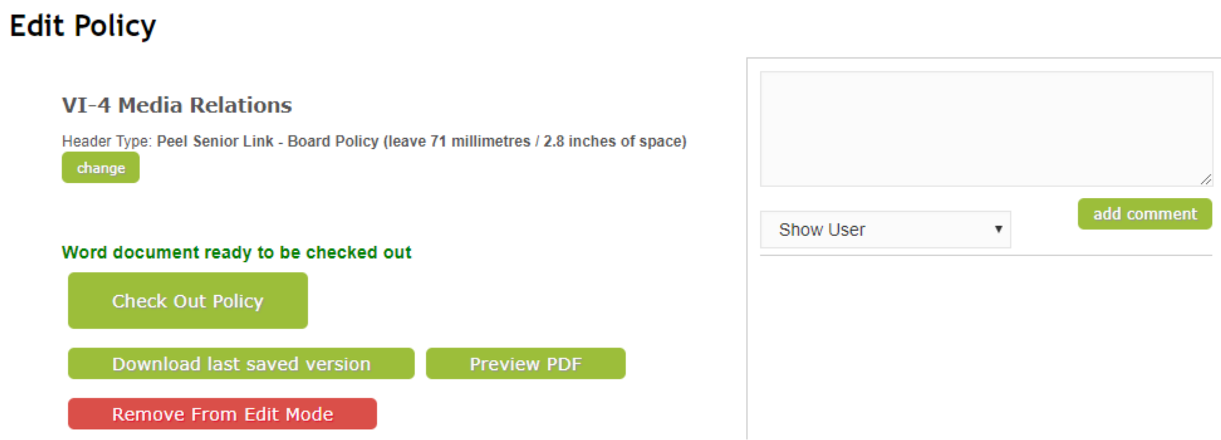


Click on "I need to Review" icon and it will display the policies that you have been asked to review. By clicking on the policy title you will get to this page.

Here you have two options: Option 1. Review the policy and publish by clicking on Reviewed. This means that you are happy with the policy and do not need input from others. This will automatically publish the policy with the new review date.

Option 2. Click on "Send to Edit Mode". You can also comment by clicking on the comment icon. This may be the rationale as to why you've decided to put it on edit mode.

If you have chosen Option 2 and you selected “Send to Edit Mode” the following screen will appear.

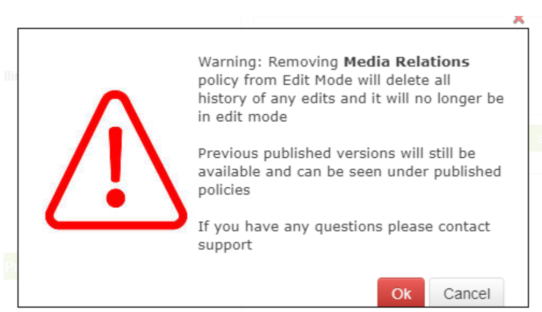


4 Different options will appear.

Preview PDF – This will allow the user to preview a pdf version of the policy. The pdf version will include the header information. The user can choose to print or download the pdf version.

Check Out Policy – The Check Out Policy prevents other users from editing the policy at the same time as someone else and allows the user to upload changes after editing.

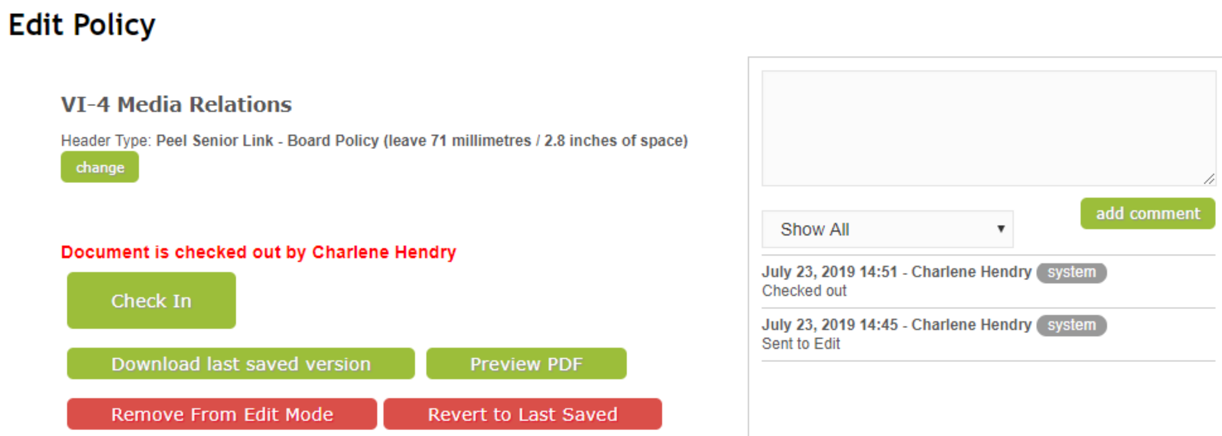
Remove from Edit Mode – The user can remove the policy from Edit Mode and no changes will be made to the original document. A warning message will appear informing the user that all edits will be deleted.



Download last saved version – The user will be able to download the last saved version of the policy and they will be able to edit the policy in the Microsoft Word. **Note: If the policy has not been “Checked Out” before the last saved version is downloaded the user will NOT be able to upload any changes that have been made to the document until they select “Check Out Policy”.**

From this screen, Select “Check out Policy”.

Once the policy has been checked out no other users will be able to check out the policy for editing. The Check Out Policy will change to Check In.



The policy will then download to your computer. Open the policy using MS Word and use track changes to track comments and revisions made to the policy. Once you have completed revising the policy save the policy on your desktop or a specified folder.

Note: Header information will not be displayed in MS Word while in edit mode. This is the document that you will be taking to the Committee/Board Meetings for review.