Setting Up Training Requirements in SciShield

Setting up training in SciShield is easy! Follow this guide to get set up.
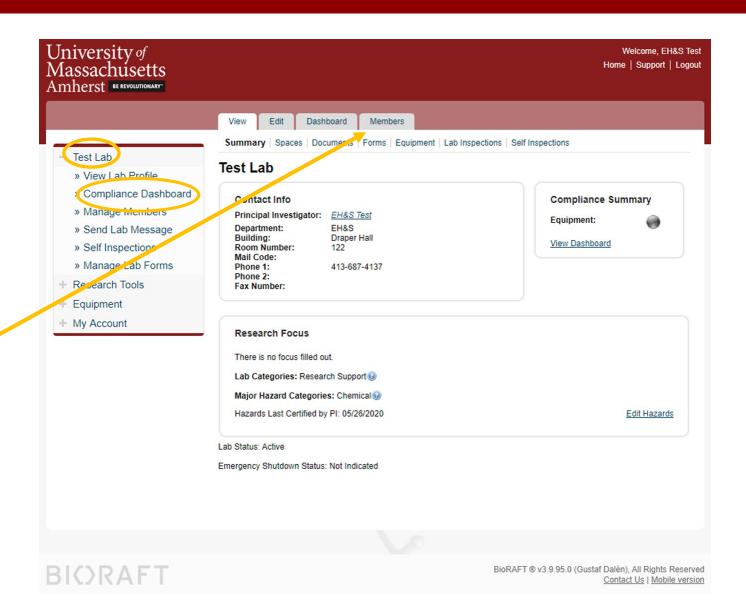
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Step 1: Add Lab Group Members

- Members have to first be assigned to your lab to have training assigned to them. This can be done in a couple of ways.
  - PIs, Group Compliance Liaisons, or training managers can all add group members
    - You can designate individual lab members as group compliance liaisons to give them this ability. You can designate as many group compliance liaisons per lab group as you wish.
    - Multiple individuals in a department can be given training manager abilities to add group members to each lab and designate trainings. If you want to add additional individuals, contact EH&S at askehs@umass.edu
  - You can even set up individual labs to allow members to self enroll if you wish

- Other Considerations
  - Individuals who are not a member of a lab will still be able to access all EH&S provided training just by logging in to SciShield, however, they will not have any particular trainings assigned to them. They will be able to complete any training that EH&S offers and a record will be retained.
  - All individuals accessing SciShield will need to have a Net ID or NENS account.
    - If you would like to request a NENS account, please find more information here: https://www.umass.edu/it/support/how-to-request-NENS-account

Adding Group Members Manually

After logging in to SciShield, click on your lab's name in the box on the left, followed by "**Compliance Dashboard**". This will open the "**Members**" tab in the top middle of the page for you to select.
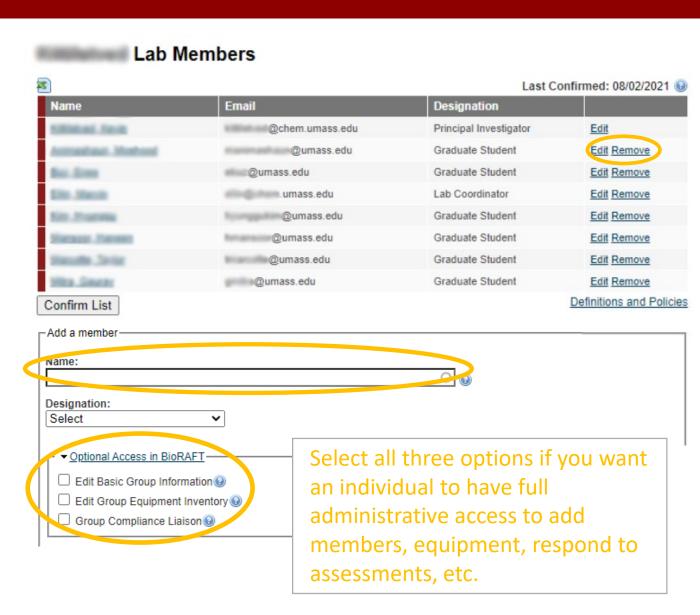
Adding Group Members Manually

Once you are in the **Members** tab, you can add members by adding their names and selecting them from the directory.

Members who you designate as group compliance liaisons and give the ability to edit basic group information will be able to add group members, respond to lab assessments, assign trainings, etc.

Click the **Edit** option next to existing group members to modify their privileges, or **Remove** to take them out of the group entirely.
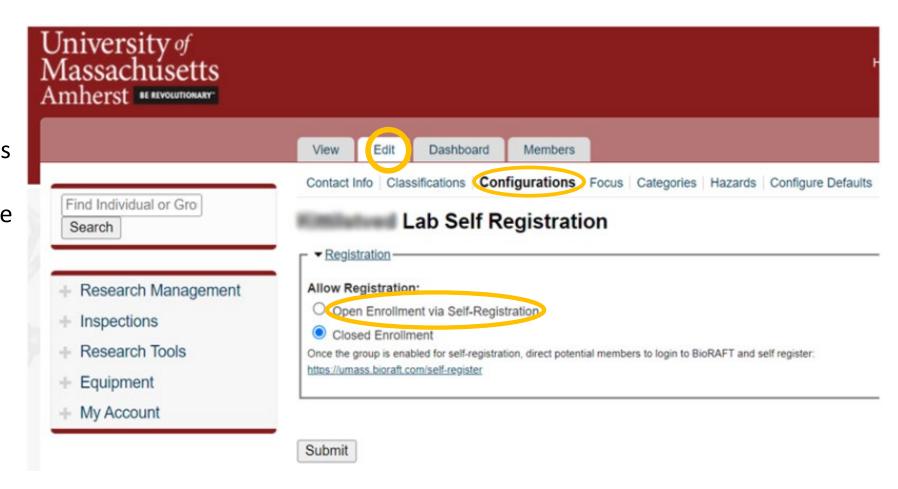
You can also specify individual job activities here, but we recommend that you view the options on the next few slides before selecting any of those to possibly save some work.

Select the **Lookup/Add** button when finished with the individual's information.

Select all three options if you want an individual to have full administrative access to add members, equipment, respond to assessments, etc.

Allowing Lab Members to Self-Roster

If you would like to permit individuals to roster themselves for your lab, you can do so by first selecting the **Edit** tab in the top middle of the screen, followed by "**Configurations**". You can then select "***Open Enrollment via Self-Registration***" to allow individuals to enroll from the link provided.

Step 2: Assign Job Activities

- Training requirements in SciShield are triggered by Job Activities. Job activities can be assigned at a lab level, at an individual level, or both.

- Assigning job activities at a ***lab level*** greatly simplifies training assignments, so EH&S recommends that you do that as often as possible. Job activities assigned at a lab level will trigger the same training requirements for every member of the lab. You only need to set these one time and they will be set for every member of the group currently and going forward.

- Assigning job activities at an ***individual level*** allows you to configure which lab members need to take particular trainings. These have to be set for each lab member. You can also set job activities at a lab level, and then configure individuals separately to add or remove specific job activities/training requirements.

- A list of the job activities and what trainings are triggered by those activities can be found here: https://ehs.umass.edu/scishield-job-activities-and-training-requirements
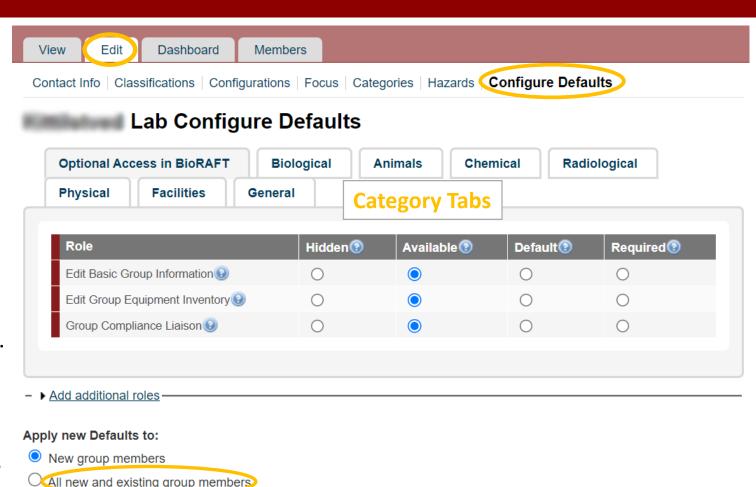
Assigning Job Activities At The Lab Level

To assign job activities at the lab level, select the **Edit** tab from the top middle of the page, followed by "**Configure Defaults**".

You can view the different job activities listed in each category by selecting the category tab.

Selecting *Default* will automatically select that job activity for everyone in the lab, but it can be turned off for selected individuals. Selecting *Required* will select the job activity for everyone in the lab, and it will not be able to be deselected. Note that you can also *hide* options that are not relevant to the lab so that you don't have to view these at all.

Select the "*All new and existing group members*" to apply the selections to all members currently and going forward. Select **Save** when finished.
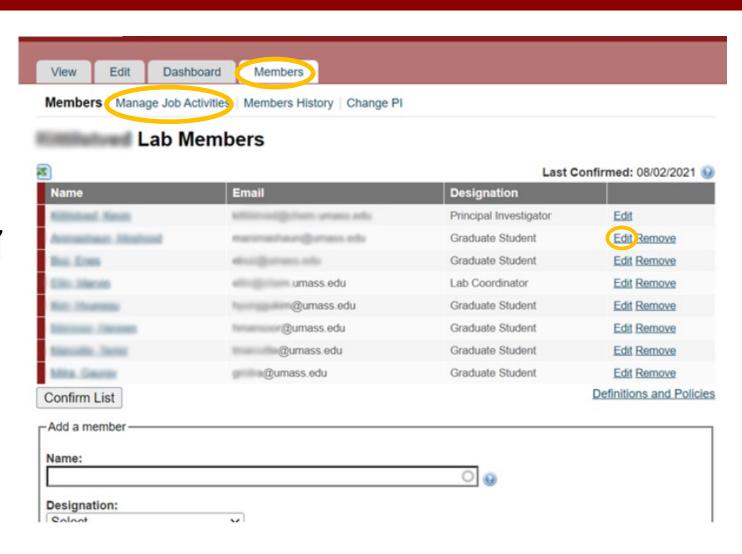
Assigning Job Activities At The Individual Level

Go to the **Members** tab in the top middle of the page.

There are a couple of ways to set individual job activities.

You can select "**Manage Job Activities**" to look at every member of the group at the same time to select individual job activities for each person. Use this to adjust job activities for multiple individuals at once.

You can also set job activities for a particular individual by selecting the **Edit** link next to their name in the lab members list.
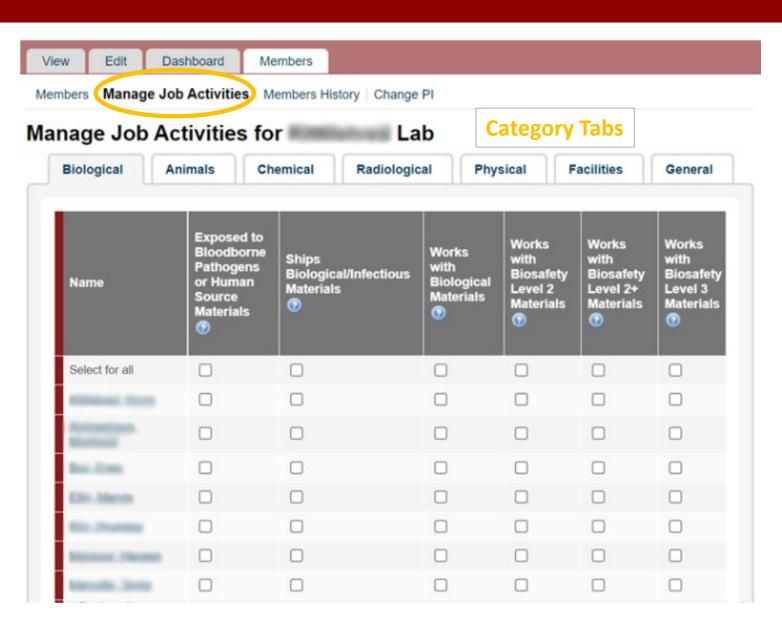
Assigning Individual Job Activities for Multiple People

To select, or deselect, job activities for multiple individuals, select the "**Manage Job Activities**" option.

You can then see each member of the lab listed and go through each job activity for each category by selecting the tabs.

Note that there is a "*select for all*" option for each job activity. You can also assign or unassign a job activity to every member of the lab at a lab level as discussed previously.

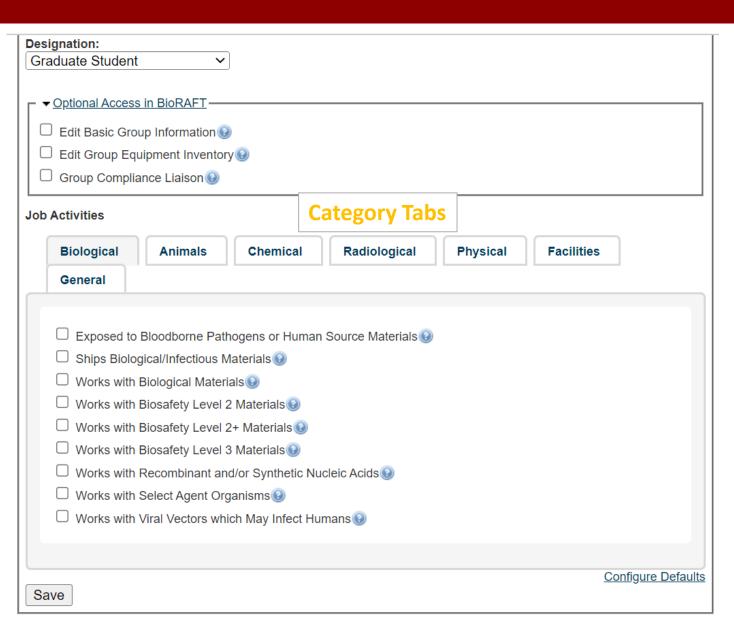When you are finished, click "**Submit**".

Assigning Individual Job Activities for an Individual

To assign or unassign job activities to a particular individual, you can select the Edit option next to the individual's name on the members list.

You can then modify job activities within the various category tabs.

Note that you can also modify the individual's administrative access if you wish.

Quick Options

- Note that many of the job activities all trigger the same major trainings, which means that for most labs, you can likely just configure a few job activities at a lab level, and you will be all set.

- Some typical lab examples follow.

- Individuals in these labs would need to take **Lab Safety** and **Fire Safety**.

- Selecting the job activity "***Exposed to Hazardous Chemicals***" under the Chemical category tab and setting this at a lab level as required would require all lab members to complete the Lab Safety and Fire Safety Trainings.

- You would not need to select any other options to trigger these two trainings, and all new lab members coming into the group would be automatically assigned these trainings.

Option 2: A typical Bio lab

- Individuals in these labs would need to complete **Lab Safety**, **Fire Safety** and **Biosafety trainings**.

- Selecting the job activity "***Works with Biological Materials***" under the Biological category tab and setting this at a lab level as required would require all lab members to complete Lab Safety, Fire Safety and Biosafety training.

- You would not need to select any other options to trigger these three trainings, and all new lab members coming into the group would be automatically assigned these trainings.

- If lab members also use an autoclave, the job activity "***Operates Autoclaves***" under the Physical category tab could be selected at a lab level as required to require all lab members to complete **Autoclave training**, or at an individual level if only certain members of the group use an autoclave and you want to only require the training of those individuals.

Option 3: A Laser Lab with Some Chemical Work

- Individuals in these labs would need to take **Lab Safety**, **Fire Safety**, and **Laser Safety trainings**.

- Selecting the job activity "***Exposed to Hazardous Chemicals***" under the Chemical category tab and setting this at a lab level as required would require all lab members to complete the Lab Safety and Fire Safety Trainings.

- Selecting the job activity "***Works with Lasers***" under the Radiological category tab and setting this at a lab level as required would require all lab members to complete the Laser Safety and Fire Safety training.

  - Note that if only some individuals will use lasers, you can set the job activity at the individual level to only require the training for those individuals if you wish.

That's It!

If you have additional questions about setting up job activities and trainings, please reach out to EH&S at askehs@umass.edu.

Thank You!

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