

# Programs and certifications

## Programs

Site Administrators create a new program with a single path for learners. The Site Administrator chooses the courses and/or competencies with linked courses that the learner is required to complete, as well as the time frame and the order they must be completed in. Groups of learners are assigned to complete the program based upon affiliations such as the position, organisation, or management hierarchy. Audiences may also be used to enrol groups of users (e.g. all users with the position of Support Analyst who work for the Help Desk organisation). Over time, when new staff members are hired, they are automatically assigned based upon their affiliations.

You can find out more about [managing programs](#) on the dedicated help page.

These features are also available in the [Totara Mobile app](#). Please note that both [programs and certifications](#) work slightly differently in the Mobile app compared to on a desktop site.

## The process

The learner receives a notification when they are assigned to programs, have upcoming due dates, or overdue work to complete. The learner works through the courses in the order the Site Administrator specifies. Over time the learner may be assigned to new programs based on changes in their position, organisation, audience membership, or management hierarchy. A program with a recurring course will automatically create a new copy of the course and activities, then enrol and notify the learner when it's time to complete the course again.

When the learner has completed coursework required for completion, Totara will immediately check to see if the course completion rules have been met. Course and program status will be updated in reports, including the learner's Record of Learning and Required Learning pages.

## Enrolment

Learners are enrolled for courses in programs when they first access the course, not when they are assigned to the program. Assigning users to a program doesn't automatically enrol them in all courses. This is because programs can have complicated course set logic, where the learner does not have access to the courses in later course sets until earlier course sets have been completed.

Instead first access to courses is controlled by the **Program** enrolment plugin. When a learner first goes to their program and attempts to launch a course, this checks whether the learner is assigned to the program and whether the course is in a course set they actually have access to, and then enrolls them in the course.

## Exceptions

If the users' assignments have unresolved exceptions they will be unable to access the program, or gain access to any courses they have not already been accessed through the program. Likewise their completion state in the program will not be reviewed and recalculated while there are exception.

Once the exceptions have been resolved the user will regain access and completion will be calculated for the user.

## Examples

Within Totara Learn programs you can support multiple learning pathways with **Some**, **All** or **Any** number of course completions required within course sets and **Then**, **Or** and **And** dividers between sets. This means Totara Learn can support scenarios such as:

- Complete Course A, B and C, then either Course D or Course E or Course F
- Complete two of Course A, B, C, D, E and F and Complete three of Course G, Course H, Course I and Course J
- Complete Course A or Course B or Course C and Course D

Within courses you can support multiple learning pathways with our [conditional](#) and [restricted access](#) functionality. There are a range of different restrictions you can place on the visibility and access to learning items within a course. These restrictions used alongside completion tracking and auto-grading, means Totara Learn can support scenarios such as:

- Complete knowledge check quiz - learners with 0-50% grade are provided access to Resource A, learners achieving 51-80% grade are provided access to Resource B and learners achieving >81% grade are provided access to Resource C
- Users with preferred language set to French are only provided visibility to Resources 4-9, learners with preferred language set to English can only see Resources 1-3 and 10
- Learners who are part of Audience ABC as a result of completing Course A, are provided visibility to Resources 9 and 10

## Certifications

Certifications are very similar to programs, as both of these facilitate the creation of a pathway for learning by acting as a container for a set of courses. However, unlike programs, certifications are only valid for a certain amount of time, after which they will prompt the learner to re-certify. This is useful for skills that need to be updated, or where you may need to demonstrate compliance with changing policies, practices, or regulations.

You can find out more about [managing certifications](#) on the dedicated help page.

The video below is taken from the Totara Academy course [Programs and Certifications](#).

As mentioned above, certifications work very similarly to programs (see [Managing programs](#) to learn more), however the exceptions are:

- There are two paths, the **Original certification path** and the **Recertification path**
- You can only add a set of courses
- When first created, you will have the option to use the existing certification content, which will copy everything you enter into the original certification path into the recertification path

Copying only happens once; afterwards, if you make a change to one path, you will need to manually make the same change to the other path if you want to keep them the same.

If the same courses were used in both the original certification path and the recertification path, then the learner's grades and completion details are recorded and archived. Activity-level completion criteria will be reset for commonly used activities, such as seminars, forums, quizzes, and SCORMs. The reset process will be slightly different for each activity. For example, a forum requiring three posts to fulfil completion requirements will clear the learner's completion, but will leave the forum posts visible so the learner has to post three more times to fulfil the completion requirements again.

When the learner has completed coursework required for completion, Totara will immediately check to see if the course completion rules have been met. Course and certification status will be updated in reports including the learner's Record of Learning and Required Learning pages.

Learners are enrolled in courses in Certification when they first access the course(s), not when they are assigned to the Certification.

 First access to courses is controlled by the *Program* enrolment plugin. When a learner first goes to their certification and attempts to launch a course, this checks whether the learner is assigned to the certification and whether the course is in a course set they actually have access to, and then enrolls them in the course. In Certifications once the learner has been enrolled into the course they remain enrolled.

Certifications may be a replacement for the program *Recurring course* functionality in some cases. A recurring course creates a new copy of the course each time the learners need to retake the course. Over time this leaves multiple archived copies of the course on the site. Rather than duplicating the course, certifications archive the learners work and grades in the course and then resets the activities so the learner can complete the same course over again.

Example
A new employee is hired and assigned to a certification based upon their position, organisation, audience membership, or management hierarchy.
They complete the original certification path which is a series of courses including 'Orientation' and 'Health and Safety Training'. After course completion conditions are met, the certification is marked as 'certified' with a certification completion record.
After one year the 'Health and Safety Training' course needs to be repeated. The same course from the original certification path is reused, the learner's completion data is archived, and their status is reset so they can redo the activities in the course.

As part of the archiving process, each activity included in a course will need to be reset. This will have a different effect on each activity so each will need to be treated separately. The table below outlines the core activities that will be reset and their effect on course completion.

Activity Name	Action Taken
Assignment	Submitted files and assignments are deleted. The learner can then submit the assignment again.
Certificates	Copy of previous certificates will be archived.
Feedback	Previous attempts are archived so that the learner can submit a new response.
Forum	Previous posts are left in the forum so that the discussion is left intact. The learner has to repost to meet the completion rules.
LTI	LTI submission records are moved to the submission history table and then submission records are removed.
Quiz	Previous attempts are deleted to ensure learners have all allowed attempts available each time the course is retaken.
SCORM	Previous attempts are deleted to ensure learners have to meet completion requirements each time the course is retaken.
Seminar	Previous attendance data will be archived. Any event sessions that took place before the certification window opens will not count towards course completion. Seminar activities have a setting that allows learners to sign up for multiple sessions within the same activity, so learners can sign up for another session in the certification or recertification period if required.

When the window opens, data and activity completion for all recertification pathway courses will be reset, including courses and activities completed by RPL. Primary certification path courses will be reset only on expiry, and only if they are not also on the recertification path.

## Assignment due dates

With a chosen assignment, you can set a due date. There are two options available when setting a due date:

- **Complete by:** This allows you to choose a specific date.
- **Complete within:** This allows you to choose a relative date. Relative dates may not be calculable for some users immediately (e.g. 'first login', for users who have never logged in). An actual due date will be given to the users as soon as they meet the criteria.

There are some important things to be aware of in the way assignment due dates work:

- If a user belongs to more than one assignment (e.g. as an individual and as part of an audience), and the assignments have different due dates, then the user's due date will be the more distant of the two.
- Due dates for assigned users can only be increased. If an earlier assignment due date is applied to a user who already has a due date set, then the earlier date will not be applied to the user. The reasoning for this is to prevent learners from being given a due date, allowing them to allocate time when they plan to complete the learning, then reducing the due date, causing them to have insufficient time to complete it. However the new due date will apply to learners who become included in the certification in the future due to this assignment (such as if a learner is added to an audience after the due date was reduced).
- Removing the due date from an assignment does not remove the due dates of applicable learners who have already been given one. However this change will be applicable to users who become included in the certification in the future due to this assignment.

Users' actual due dates may differ from the assignment due date for various reasons, including:

- If another assignment type includes the same user, the other assignment due date may override this one
- If this assignment has a relative due date, which is not yet applicable to the user
- A user may have been granted an extension by a manager
- If an exception occurred and the **Set realistic time allowance** action was used to resolve it
- This assignment due date may have changed, but the user still has the due date that was originally given to them
- The due date has automatically been set to the expiration date

Assignment due dates are recorded when you press the **Save changes** button, but are not applied until the user assignments are updated. If you see a message indicating that user assignments have been deferred then any user due date changes will not yet be applied and will be processed when the `assignments_deferred_task` scheduled task is run.

Sometimes accidents happen and a completion date is set incorrectly, or a user's due date needs changing for whatever reason. If changes are required then they can be done using the [certification completion editor](#).

## Reassignments

It is not uncommon that users may be unassigned from a certification, then reassigned. For example, a user could be a member of an audience assigned to a certification, no longer meet the audience membership criteria, and is therefore removed from the audience and unassigned from the certification. The user is then reassigned to the certification via the same (or different) assignment method.

When a user is reassigned to a certification they will be returned to their previous status. This works by the system locating the latest unassigned certification completion history record and restoring the user to their previous state. Any events that need to occur (such as the window opening for recertification) will take place when the relevant cron task runs.

A user who is unassigned and reassigned to a certification will be placed back onto their primary certification path. Depending on their current course completion(s), their status may be reaggregated when the relevant cron task runs.

## Note about repeating periods

Consider the following scenario. The **expiry date** or **fixed date** method is used and the active period is one month. A user has a due date of 31 January. They complete before 31 January. Their next expiry date cannot be calculated as 31 February, because the date does not exist. The actual date calculated will be different and it could be anything from 28 February to March 3, but whichever it ends up being, that's the date that will repeat from that point onward. This same problem can occur with different active periods, such as one year, if you choose February 29.

## Managing seminar activities as part of a certification

Where learner attendance is a condition of seminar activity completion, attendance marked outside of the window open period does not contribute to course completion for the current period.

## Changing or removing courses in an active certification

If the initial certification path is changed for an active certification, this will not remove the certification completions for users who have already completed it.

Once a user is marked as certified any changes you make to the path will not affect their certification and it will remain as **complete**. Once the user reaches the re-certification window open point, the completion will be archived and the user will need to complete the re-certification path.

Only newly assigned users or users with a status of **in progress** will be affected by these changes and these users will need to complete the certification based on the changes to the content.

## Certification/Recertification scenarios

This table shows some different scenarios and what state user's certifications should be in as a result.

Scenario	Recertification date based on Completion date	Recertification date based on Completion date	Recertification date based on Expiry date	Recertification date based on Expiry date	Recertification date based on Fixed date	Recertification date based on Fixed date
	Assignment has no due date	Assignment has due date	Assignment has no due date	Assignment has due date	Assignment has no due date	Assignment has due date
When assigned	Open for primary certification					
Late for primary certification	Open for primary certification	Open for primary certification Overdue	Open for primary certification	Open for primary certification Overdue	Open for primary certification	Open for primary certification Overdue
Complete primary certification before due date	Certified Expiry date = certification date + active period	Certified Expiry date = certification date + active period	Certified Expiry date = certification date + active period	Certified Expiry date = due date + active period	Certified Expiry date = certification date + active period	Certified Expiry date = due date + active period
Complete primary certification after due date	Certified Expiry date = certification date + active period	Certified Expiry date = certification date + active period	Certified Expiry date = certification date + active period	Certified Expiry date = certification date + active period	Certified Expiry date = certification date + active period	Certified Expiry date = due date + active period*
Complete recertification before time expires	Certified New expiry date = recertification date + active period	Certified New expiry date = recertification date + active period	Certified New expiry date = previous expiry date + active period	Certified New expiry date = previous expiry date + active period	Certified New expiry date = previous expiry date + active period	Certified New expiry date = previous expiry date + active period
Certification expires	Expired / Open for primary certification Overdue (due on the previous expiry date)	Expired / Open for primary certification Overdue (due on the previous expiry date)	Expired / Open for primary certification Overdue (due on the previous expiry date)	Expired / Open for primary certification Overdue (due on the previous expiry date)	Expired / Open for primary certification Overdue (due on the previous expiry date)	Expired / Open for primary certification Overdue (due on the previous expiry date)
Recomplete primary certification after certification expired	Certified Expiry date = certification date + active period	Certified Expiry date = certification date + active period	Certified Expiry date = certification date + active period	Certified Expiry date = certification date + active period	Certified Expiry date = previous expiry date + active period*	Certified Expiry date = previous expiry date + active period*

\* This is assuming that the calculated expiry date is at least the **minimum active period** into the future. If it is nearer than that, the 'active period' is added repeatedly until the expiry date is sufficiently far in the future. This will occur if a user is extremely overdue (more than **active period - minimum active period**).

## Exceptions

If the users' assignments have unresolved exceptions they will be unable to access the certification, or gain access to any courses they have not already accessed through the certification. Likewise their completion state in the certification will not be reviewed and recalculated while there are exception.

Once the exceptions have been resolved the user will regain access and completion will be calculated for the user.

## Certification course statuses

When a user is working through an assigned certification the certification will only show the status of courses on the path the user is currently working through. If the window has not opened yet, the status of courses on the path the Learner just completed will be shown. Course statuses for other paths will not be shown as these are not relevant to the user.

For example, if the user is working through courses in the recertification path they will only need to know the status of the courses on that path. If a user had recently recertified, they would only see statuses for the path they completed, and not for the original path.

## Academy courses



The Totara Academy has a whole course dedicated to using [Programs and certifications](#) in Totara Learn. Here you can learn more on how to use programs and certifications, see best practice, and give it a go yourself.