



Purpose: Instructors assigned to facilitate Live Courses scheduled in Skillssoft Percipio are provided permissions to manage responsibilities of their course:

- Access your instructor schedule
- Manage registrations (register learner, cancel learner registration)
- Manage waitlists
- Process attendance reconciliation

Additional detailed information covering these responsibilities is available in Percipio Knowledge Base Article: [Managing Class Registrations, Waitlists, and Completions](#).

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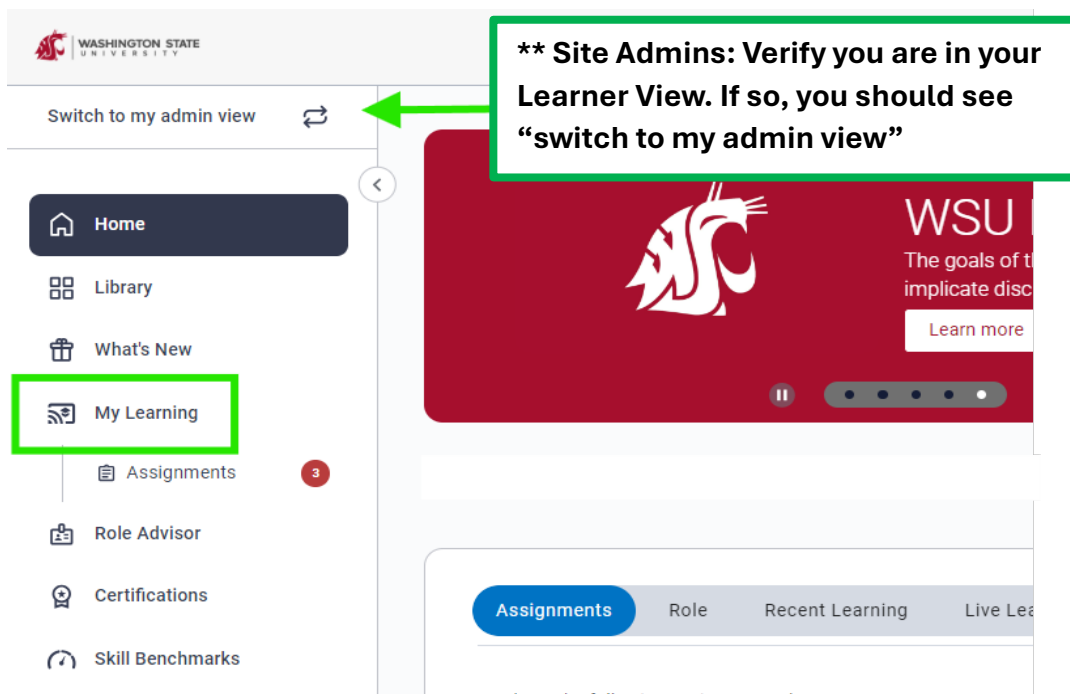
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ACCESS INSTRUCTOR SCHEDULE

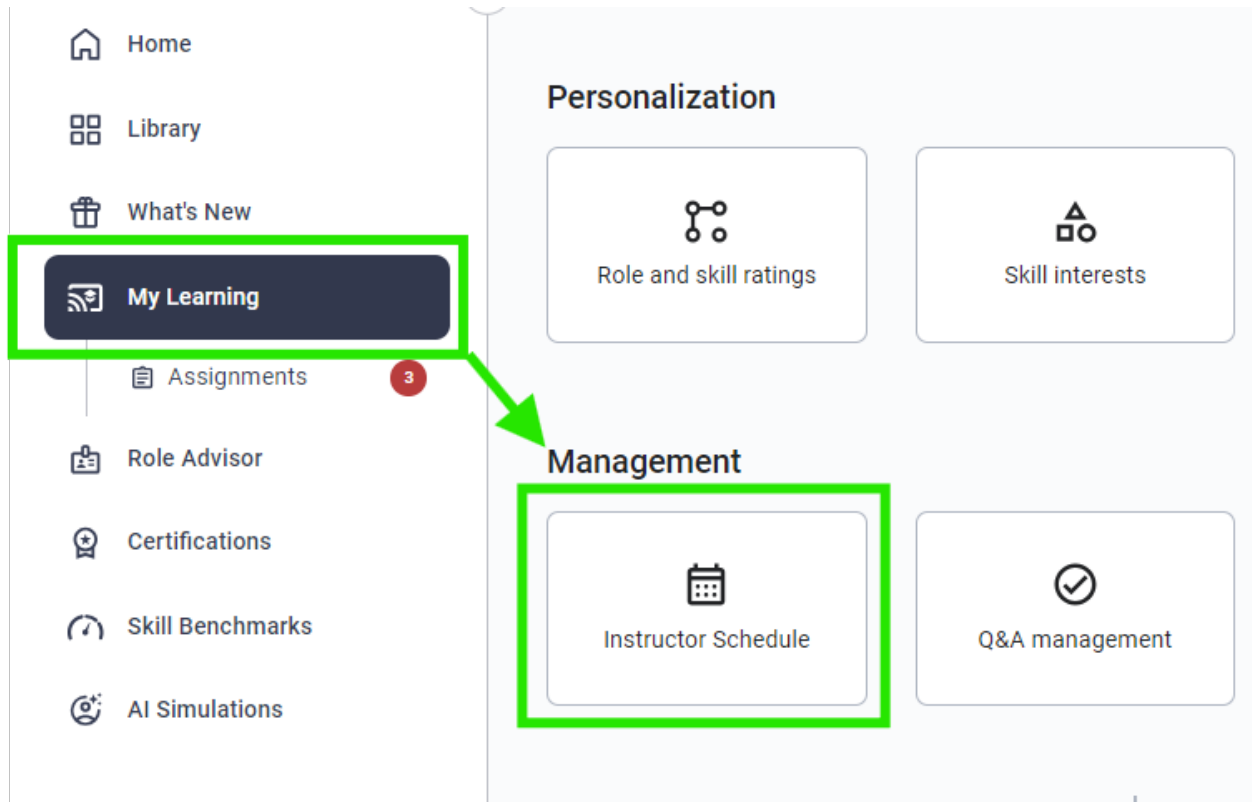
All subsequent actions for managing the class roster, registrations, cancellations, and waitlist actions are done through your Instructor Schedule.

1. To access your instructor schedule, login to [Percipio](#) and preform the Okta MFA authentication.
2. From the left side navigation menu, select MY LEARNING
 - a. Note for instructors with site-admin privileges: Menu options vary between your “Learner view” and “Admin view.” To ensure you can access your instructor schedule, and associated instructor functions, ensure you see “switch to my admin view” displayed between the WSU HRS logo and HOME icons as pictured below.

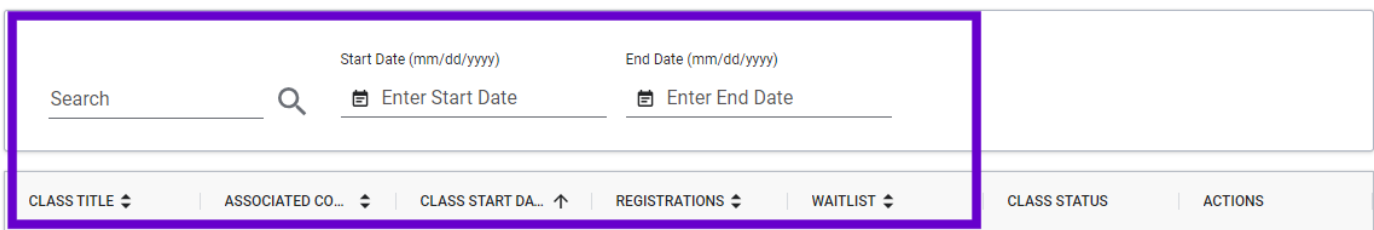




- When on the MY LEARNING page, scroll to the Management section located at the bottom of the page, and select INSTRUCTOR SCHEDULE



- From the Instructor Schedule, you can interact with the classes of which you have instructor permission for by filtering based on keyword, or date range. Instructors can also use the arrow up/arrow down function displayed at the top of a column to re-order smallest/largest, or alphabetically. The columns are automatically sized based on the size of the window; columns can be resized by left click and holding the separator to slide and resize the width of the column. The schedule is broken down into columns and rows.





- a. **Class Title:** Depending on the course, the class title may differ from the course title.

CLASS TITLE ↕	ASSOCIATED COURSE ↕
Discrimination, Sexual Harassment, and Sexua...	Employee Rights and Responsibilities Under Executive Policy 15 Live Course ...

- b. **Associate Course:** The course that the class has been created under and is associated with.
- c. **Class Start Date:** Date the class is scheduled to begin.
- d. **Registrations:** Count of how many learners have registered for the class.
- e. **Waitlist:** Count of individuals on the class waitlist when the class capacity is reached.

CLASS TITLE ↕	ASSOCIATED COURSE ↕	CLASS STAR... ↑	REGISTRATIONS ↕	WAITLIST ↕
Discrimination, Sexual ...	Employee Rights and Responsi...	Mar 05, 2024	31	13
Bite-Size Book Club : S...	Bite-Size Book Club	Mar 27, 2024	17	0

- f. **Class Status:**
- i. **NOT STARTED:** based on the details provided during class creation, the class has not yet commenced started. Learners can be added/removed from the roster only. No completions/incompletions can be marked while the class is a NOT STARTED status.
 - ii. **STARTED:** the class commenced based on the specified date and time provided during its creation. Learners cannot be added/removed or marked complete/incomplete while the class is in a STARTED status.
 - iii. **ENDED:** the class concluded based on the specified date and time provided during its creation. An ENDED status represents the class is ready for attendance reconciliation using the in-person attendance sheet or Zoom attendance report. ****Do not remove a learner from the roster. Refer to Attendance Reconciliation.****



- iv. VERIFIED: all learners have been marked complete/incomplete as appropriate based on the in-person or Zoom class attendance.
- g. **Actions:** For classes that have registrations, VIEW ROSTER will be displayed. Classes without active registrations will display VIEW DETAILS.

CLASS TITLE	ASSOCIATED CO...	CLASS START DA...	REGISTRATIONS	WAITLIST	CLASS STATUS	ACTIONS
Bite-Size Book Cl...	Bite-Size Book Cl...	Jun 04, 2024	22	0	Verified	View roster
Bite-Size Book Cl...	Bite-Size Book Club	Jun 04, 2024	0	0	Not Started	View Details
Graduate Assista...	Graduate Assista...	Jul 31, 2024	24	0	Ended	View roster

VIEWING CLASS DETAILS & ROSTER

1. Launch [Percipio](#), sign in and perform the Okta authentication when prompted. Refer to [Access Instructor Schedule](#) if needing guidance on this process.
2. From the Instructor Schedule, locate the class, then click VIEW ROSTER **Reminder, only classes with active enrollments will display View Roster.**

CLASS TITLE	ASSOCIATED CO...	CLASS START DA...	REGISTRATIONS	WAITLIST	CLASS STATUS	ACTIONS
Bite-Size Book Cl...	Bite-Size Book Cl...	Jun 04, 2024	22	0	Verified	View roster
Bite-Size Book Cl...	Bite-Size Book Club	Jun 04, 2024	0	0	Not Started	View Details
Graduate Assista...	Graduate Assista...	Jul 31, 2024	24	0	Ended	View roster

The class roster details will be at the top of the page, including:

- Class & course name
- Class start date
- Class capacity
- Registered learners

Roster: Crucial Conversations Book Review (formerly Effective Communications: Parts 1-3) : Class 4

Part of course: Crucial Conversations Book Review (formerly Effective Communication, Parts 1-3)
Class Start Date: Oct 30, 2024 | Class Capacity: 50 | Registered learners: 12

[Registered learners](#) | [Registration waitlist](#)

Search learners by name or email address

[Actions](#)

USER ID	NAME	EMAIL ADDRESS	REGISTRATION STA...
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Though many functions within a class roster are universal, there are some actions that vary based on the class status. Below are functions that operate universally across rosters regardless of the class status:

- View Class Details:** Quick view of the class description, date, time, duration, location, duration, and additional information added when the class was created.
- Registered Learners:** List of learners who have registered for the class with name, user ID, email address, registration status, date registered, completion status, score, and user status. Use the search action (magnifying glass icon) to search for a registered learner.
- Registration Waitlist:** When the class capacity is reached, learners can elect to be added to the waitlist. Instructors can manage the waitlist, moving learners to registration for that class, or another one. Learners can also be removed from the waitlist. Refer to **Manage Waitlist** for more information.
- Register:** Manually register a learner for the class.
- Download:** Download the class roster to a CSV or PDF file. Refer to **Download Class Roster/Audit File**.

Roster: Crucial Conversations Book Review (formerly Effective Communications: Parts 1-3) : Class 4 ?

Part of course: Crucial Conversations Book Review (formerly Effective Communication, Parts 1-3)

Class Start Date: Oct 30, 2024 | Class Capacity: 50 | Registered learners: 12

Registered learners | Registration waitlist

Search learners by name or email address

Register | Bulk mark complete | Download

Actions

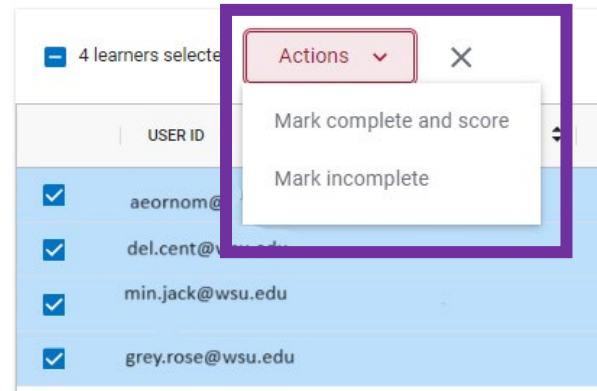
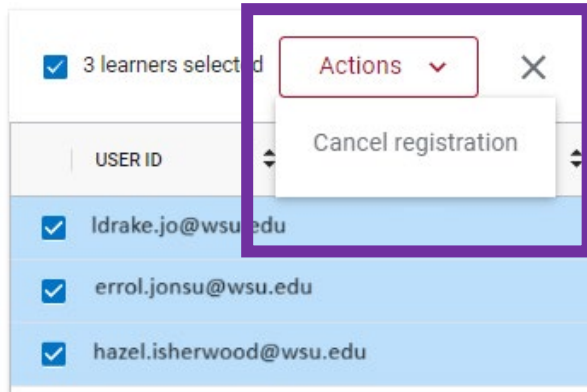
USER ID	NAME	EMAIL ADDRESS	REGISTRATION STA...	REGISTRATION DATE	COMPLETION STAT...	SCORE	USER STATUS
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The following roster functions vary slightly based on the status of the class.

ACTIONS FUNCTION:

- Classes in a NOT STARTED status: Cancel learner registration- bulk action available.
- Classes in an ENDED status: Mark learner(s) complete/incomplete- bulk action available.
- Classes in a STARTED status: No function.
- Classes in a VERIFIED status: No function.

Bulk Actions: Allows multiple learners to be marked complete/incomplete, or registration cancellation. ***refer to Attendance Reconciliation for guidance on processing completions.***



CAUTION: ONCE A LEARNER HAS BEEN MARKED COMPLETE or INCOMPLETE THE ACTION CANNOT BE REVERSED and is in the PERMANENT RECORD.

DOWNLOAD CLASS ROSTER/AUDIT FILE

A class roster can be downloaded for ease of taking a quick attendance before the kick-off of your class, or use as a sign-in sheet if the class is being held in-person.

1. Login to [Percipio](#) and access your **Instructor Schedule**.
2. Locate the class from the instructor schedule and click **View Roster**.
3. From the class roster, click DOWNLOAD and select the action:
 - a. **DOWNLOAD REGISTERED LEARNERS** or **REGISTRATION WAITLIST**: downloads the course roster as a CSV file. The learners are grouped by class title, learner status, and completion status.
 - b. **DOWNLOAD CLASS AUDIT**: downloads the audit history trail to see who made changes to learner registrations and when, including cancellations.



REGISTER LERANER(S) FOR A CLASS

By default, classes are set for self-registration via the Percipio system, however there are occasions when the instructor must manually add a learner(s) to the class roster. This occurs when a class is a closed departmental training with a specific group of participants, or when a learner attends an instructor-led class via Zoom using a meeting link that has been shared with them from another registered participant, or instructor. Adding learners to a class roster can be done at anytime regardless of the class status. ****Do not cancel a learner's registration unless the class is in a NOT STARTED status.****

1. Login to [Percipio](#) and access your **Instructor Schedule**
2. Locate the class from the instructor schedule and click:
 - a. VIEW ROSTER for a class with a status of ENDED or VERIFIED.
 - b. VIEW DETAILS for a class with a status of NOT STARTED.
3. From the class roster, select REGISTER

Roster: Crucial Conversations Book Review (formerly Effective Communications: Parts 1-3) : Class 4

Part of course: Crucial Conversations Book Review (formerly Effective Communication, Parts 1-3)

Class Start Date: Oct 30, 2024 | Class Capacity: 50 | Registered learners: 12

Registered learners | Registration waitlist

+ Register | Bulk mark complete | Download

Search learners by name or email address

4. Using the “Search for Existing Percipio Users” function, search for the learner by name or WSU email. Instructors cannot add new user(s) to Percipio.

Register learner(s) for class

Search Existing Percipio Users | Register learner(s) from CSV | Add new Percipio User(s)

Register existing Percipio users for your class

Learner name

Type to select one or more learners

Does the learner have a Percipio user account?
If you are unable to find the person you are looking for, please use the “Add New Percipio Users” tab.

Cancel | Save and add



- When all learners have been added to the roster, select SAVE AND ADD in the lower right of the screen. Percipio will return to the class roster, review and verify your added learner(s) are present on the roster.

CANCEL LERANER(S) CLASS REGISTRATION

By default, the Percipio system will allow learners to cancel their own registration up to the scheduled date and time of the class. In some cases, a class may have an advance date for registration to close to facilitate pre-course work, or processing learners into a subsequent system, such as myWSU. Instructors can only cancel learner registration when the class is in a NOT STARTED status.

- Login to Percipio and access your **Instructor Schedule**.
- Locate the class from your instructor schedule and click **View Roster**.

CLASS TITLE	ASSOCIATED CO...	CLASS START DA...	REGISTRATIONS	WAITLIST	CLASS STATUS	ACTIONS
Crucial Conversat...	Crucial Conversat...	Oct 30, 2024	12	0	Not Started	View roster
Bite-Size Book Cl...	Bite-Size Book Club	Sep 25, 2024	1	0	Not Started	View roster

- While viewing the class roster, left click the ACTIONS displayed to the far right of the learner name, represented by three stacked dots, then YES, CANCEL REGISTRATION.
 - Alternatively, a learner registration can be canceled by selecting the ACTIONS button. CAUTION: if not careful, you can cancel multiple enrollments at a time, exercise due diligence when using this method.
 - Selecting the box that appears to the immediate left of the learner name.
 - Click the ACTIONS button again, then CANCEL REGISTRATION.



Registered learners Registration waitlist + Register Bulk mark complete Download

Search learners by name or email address

Actions

USER ID	NAME	EMAIL ADDRESS	REGISTRATIO...	REGISTRATIO...	COMPLETION ...	SCO...	
...	Registered	May 16, 2024	Not Started	NA	⋮
...	Registered	May 22, 2024	Not		Yes, cancel registration
...	Registered	Jun 12, 2024	Not Started	NA	⋮

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MANAGING REGISTRATION WAITLIST

When a class reaches the capacity set when created, registrants can elect to be added to the waitlist. In the event a registered participant cancels, Percipio will automatically add the first listed participant on the waitlist to the active roster, based on date/time individuals self-enrolled in the waitlist.

Should an instructor feel comfortable with increased capacity, they have the freedom to manually add individuals from the class waitlist to the active roster without assistance from LOD to increase the class capacity.

1. Login to [Percipio](#) and access your **Instructor Schedule**.
2. Locate the class you want to manage and click on the waitlist count, which will take you directly to the waitlist. The waitlist can also be accessed through **View Roster**, then click REGISTRATION WAITLIST displayed below the class details.

Search Start Date (mm/dd/yyyy) End Date (mm/dd/yyyy)

Enter Start Date Enter End Date

CLASS TITLE	ASSOCIATED COUR...	CLASS START DATE	REGISTRATIONS	WAITLIST	CLASS STATUS	ACTIONS
Discrimination, Sex...	Employee Rights a...	Mar 05, 2024	31	13	Verified	View roster



3. Instructors can manage the waitlist by selecting an action for each singular individual, or if the same action applies to multiple participants, the ACTIONS button can be used. The functions are the same regardless.

Managing single participants:

- a) from the registration waitlist, locate the participant
- b) select an action from the stacked dots to the far right of the participant name
 - i. REGISTER FOR THIS CLASS: moves the participant from the waitlist to the active class roster.
 - ii. REGISTER FOR A DIFFERENT CLASS: moves the participant from the waitlist to the active class roster for another class of the same course.
 - iii. REMOVE FROM WAITLIST: removes participant from the waitlist, but does not prevent them from joining it again.

Registered learners | **Registration waitlist** 13

+ Register | + Bulk mark complete | Download

Search learners by name or email address

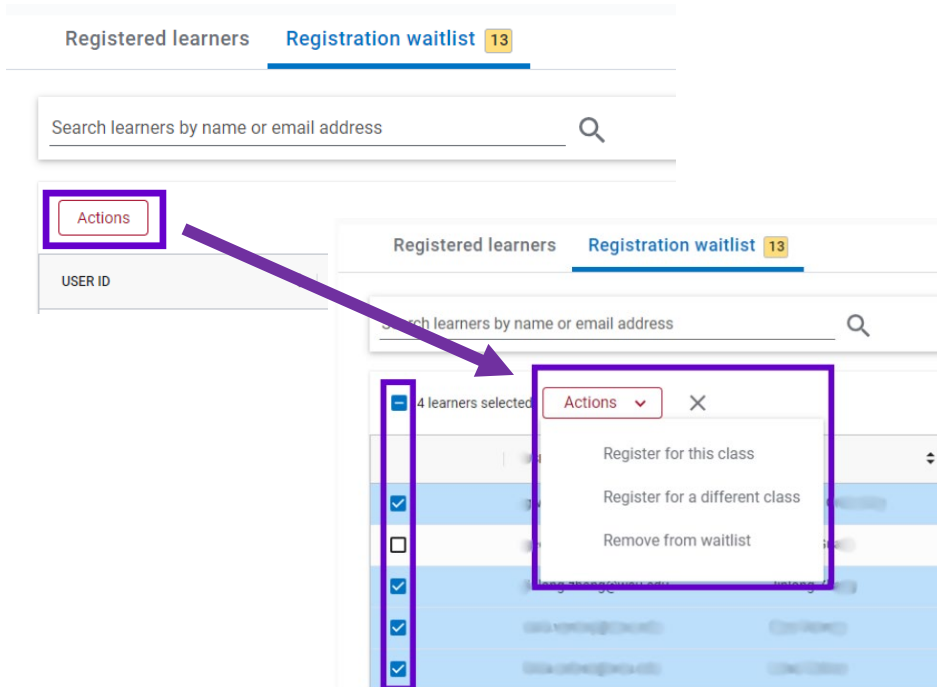
Actions

USER ID	NAME	EMAIL ADDRESS	REGISTRATIO...	WAI
gprath.gprath@wsu.edu	Gopriya Gopriya	gprath.gprath@wsu.edu	Waitlist	De
gprath.gprath@wsu.edu	Gopriya Gopriya	gprath.gprath@wsu.edu		
gprath.gprath@wsu.edu	Gopriya Gopriya	gprath.gprath@wsu.edu		
gprath.gprath@wsu.edu	Gopriya Gopriya	gprath.gprath@wsu.edu		

Register for this class
Register for a different class
Remove from waitlist

Managing multiple participants:

- a) from the registration waitlist, click ACTIONS.
- b) click the box to the left of a participant(s) to select who the action will apply to.
- c) click ACTIONS again and select the applicable list of actions.



RECONCILING ATTENDANCE

Instructor(s) are responsible for reconciling attendance of their courses. For in-person classes, the physical roster should be used to reconcile attendance within 30-days from the date of class completion. Online instructor-led training scheduled through LOD via Zoom receive the Zoom roster from LOD within 2-weeks of the conclusion of the class. Attendees must be present for 80% of the session duration is required to be eligible for credit and grant completion. For classes that are a series with multiple dates, 80% attendance for each class is required. Upon the conclusion of a class (for multi-date classes, the last date/time has passed) learners see the completion status as started until the attendance is reconciled.

Additional notes regarding reconciling attendance:

- Late arrivals and participants that leave early with less than 80% attendance must be marked incomplete.
- Participants who registered and did not show must be marked incomplete.
- Attendees present for a class, but not registered in Percipio will need to be manually registered by the instructor (refer to **Register Learner(s) For A Class**) and marked complete/incomplete as appropriate.
- ALL attendees on the Percipio class roster must be marked complete/incomplete as appropriate. No participant can remain in a STARTED status.



PROCESSING ATTENDANCE:

1. Login to [Percipio](#) and access your **Instructor Schedule**
2. Locate the class from the instructor schedule, click on **View Roster**.

Start Date (mm/dd/yyyy) End Date (mm/dd/yyyy)

Search

CLASS TITLE	ASSOCIATED CO...	CLASS START DA...	REGISTRATIONS	WAITLIST	CLASS STATUS	ACTIONS
Crucial Conversat...	Crucial Conversat...	Oct 30, 2024	12	0	Not Started	View roster
Bite-Size Book Cl...	Bite-Size Book Club	Sep 25, 2024	1	0	Not Started	View roster

3. Compare the class roster to your physical attendance sheet, add any attendees not registered in Percipio. *refer to **Register Learner(s) For A Class***
4. Use the physical roster from the in-person class, or provided Zoom roster provided by LOD for online classes to decision participants and mark their attendance appropriately.
5. **Marking individual learner complete/incomplete:**
 - a. Click on the ACTIONS ICON (three stacked dots) to the far right of the learner name
 - b. From the drop-down, select the appropriate action

CAUTION: ONCE A LEARNER HAS BEEN MARKED COMPLETE or INCOMPLETE THE ACTION CANNOT BE REVERSED or DELETED and is in the PERMANENT RECORD.

MARK COMPLETE and SCORE:

- Class end date
- Learner score (optional- leave blank)
- SAVE

Mark complete and score

Please note: Saved completions cannot be deleted.

Completion date

Class End Date Today's Date

Learner score (optional)

Cancel

Save

Mark learner incomplete?



Are you sure want to mark this learner incomplete?

Cancel

Yes

MARK INCOMPLETE: YES to confirm



6. Marking multiple learners complete/incomplete

- a. from the class ROSTER, select ACTIONS
- b. click the box to the left of a participant(s) to select who the action will apply to
- c. click ACTIONS again and select the applicable list of actions: **Mark Complete and Score** or **Mark Incomplete**.

CANCELING OR RESCHEDULING A CLASS

Instructors have the discretion to cancel a class if there are less than 5 registered participants, or an unavoidable conflict arises. Upon cancellation of the class in Percipio, registered learners receive automatic notification from Percipio. To avoid participant confusion and frustration, cancellation/rescheduling must be communicated no less than 2-hours before the scheduled date/time of the class, allowing LOD enough time to preform cancel/reschedule actions in Percipio and Zoom (if applicable).

1. Login to [Percipio](#) and access the **Class Roster** from the **Instructor Schedule**.
2. From the roster, email registered participants to advise of the cancellation or reschedule.
Best practice:
 - a. Download the class roster- it will be deleted when LOD cancels the class. (Using the downloaded roster makes capturing email addresses a rapid process and eliminates typo errors.)
 - b. To: hrr.training@wsu.edu
 - c. BCC: Copy/paste registered participants emails from the roster
 - d. Subject: TIME SENSITIVE NOTICE: Class Title, Date, Canceled/Rescheduled
 - i. *TIME SENSITIVE NOTICE: Hostile Intruder Training 9/10/24 Canceled*
 - e. Make message high priority

Feel welcome to craft a personalized message to registered participants, or use/modify the template on the next page to fit your needs.

3. Upon receipt of the notification to learners, LOD will cancel/reschedule the class in Percipio, and if applicable, Zoom. Provide Reschedule details to LOD if unknown when you send the notice of cancellation.



Dear Participants,

Thank you for registering for *<insert class title>* scheduled on *<insert day, date, time>*. To ensure a meaningful and engaging experience, and to allow for additional enrollments, the class on *<insert “today’s” or date of upcoming class being cancelled>* has been *<insert cancelled/rescheduled>* *<insert reschedule information if available>*. We understand this may be disappointing news and sincerely apologize for any inconvenience.

To find the most convenient availability for your schedule, please log in to Percipio and register for the next scheduled class. If a future class does not fit your schedule, or none are available, enable alerts to receive notifications when additional classes are added. Unsure how to [enable alerts](#)? Visit the [FAQ](#) or step-by-step guidance.

In the meantime, we encourage you to explore the many resources available to you within Percipio on this topic and many others.

Thank you for your understanding and continued support.

TROUBLESHOOTING

I reconciled attendance, but the class status has not updated from “started” to “ended”.

Percipio will update the class status during overnight processing. If the status is still reflecting “started” the day following your reconciliation, check to be sure every learner is marked with a complete or incomplete. No learner should be in a “started” status.

I need to cancel a class, but don’t see how. What do I do?

Cancelling a class is a collaboration between the instructor and LOD. After the Instructor notifies all registered participants from the class roster of the cancellation, and if applicable, reschedule information, LOD processes the cancellation action in Percipio and subsequent programs such as Zoom. See **CANCELLING OR RESCHEDULING A CLASS** for details and steps for this process.



I'm trying to register a learner for a class, why do they not show in the search results?

Percipio access is only available to individuals holding an active paid appointment. Those without a WSU email address will not have a learner file or access to the learning system.

Why can't I add a new learner and register them for a class?

Only those with Site Admin permissions can manually add new learners. To avoid duplication of accounts and license usage, WSU uses a file transfer from Workday to Percipio to create learner accesses. Percipio is only available to individuals on an active paid appointment.

I have a learner who needs to switch their class enrollment. Why am I unable to register them for a different upcoming date?

Percipio only allows a learner to be registered for a class of the same course at a single time. The best practice is to have them cancel their registration and register for a date that works with their schedule. An instructor can cancel a learner's registration, and manually add them to another class of the same course.

Example: Todd is enrolled in the upcoming budget management course with a class on Tuesday. Due to an urgent meeting, he's unable to attend and wants to move to the next scheduled class in two weeks. First, cancel his registration in the class Todd cannot attend. Next, access the roster for the class Todd wants to attend instead, and manually register him.

RESOURCES:

Percipio Knowledge Base: **Managing Class Registrations, Waitlists, and Completions**

Learning Administrator Page and **Lookup**

Email HRS Learning and Development

Call HRS Learning and Development: 509-335-9159

Access Percipio **FAQ's**