Alchemy Coach

05/2022

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Training Day Agenda

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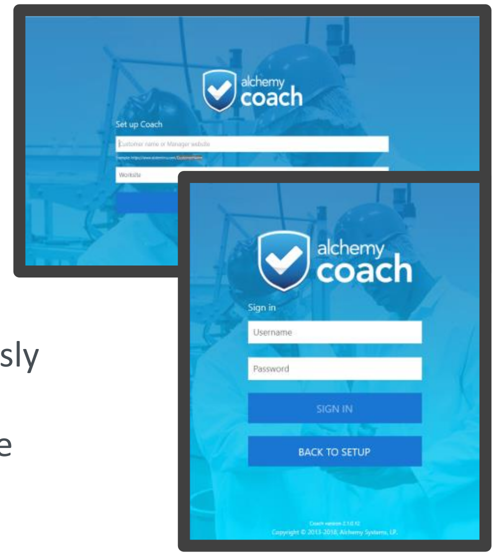
- Creating Observation & Managing Reports

Coach Overview

Key Features and Terms

Key Features
1. Document and report root cause analysis
2. Streamline corrective action workflows
3. Conduct scheduled or impromptu safety reviews
4. Use standardized observations or create your own
5. Add hyperlinks to Company Specific Observations
6. Multiple scoring options
7. Observe employees individually or multiple simultaneously
8. Works on iOS, Windows 10, and Android devices
9. Works in Landscape or Portrait view depending on device



Glossary Terms

Coach
1. Application that is downloaded onto the device
2. Name of the administrator performing the observation
3. Level of access required to utilize the application

Observation
1. An action item and knowledge review checklist created in Manager and synced in the Coach device
2. The act of a Coach watching an employee perform tasks and rating the employee's performance with the checklist

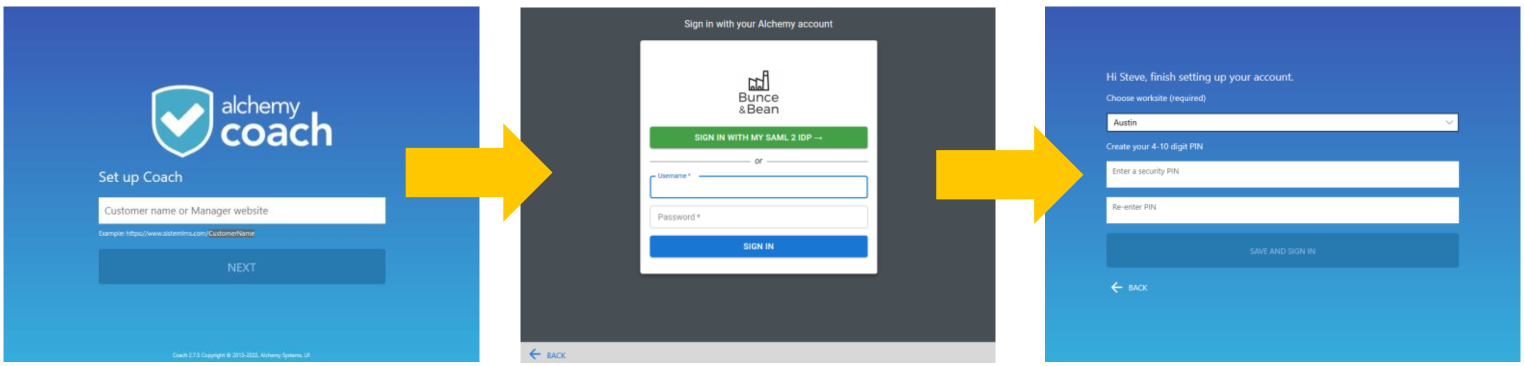
Corrective Actions
1. Optional next step for observations that have been marked Not Compliant

Sign in to Coach

Set up Coach app on your device

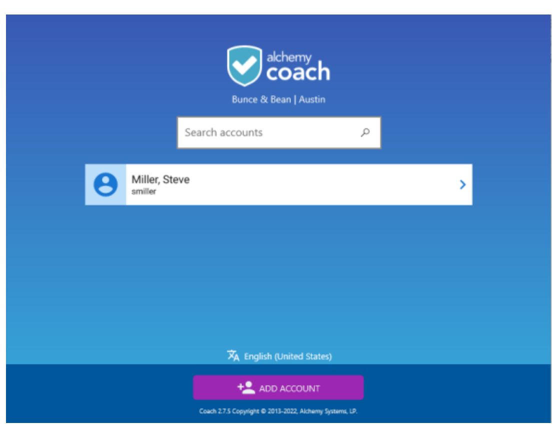
1 First time set-up

1. Download the Alchemy Coach app from your app store
2. Input the "customer name" (which is your company name as it appears at the end of your Manager URL: https://www.sistemlms.com/________)
3. Sign-in with your Manager Username and Password
4. Select your worksite and create your pin number



2 Signing into Coach after set up

1. Select your name on the accounts page of the app
2. Enter your pin
3. If your account is not listed, click "Add Account" at the bottom. Then you will sign in and set up your pin for this device.



Trouble Signing in?
See Pg. 11

Coach Facilitation

Begin Verifying Knowledge with Coach

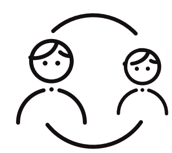
1 Home Screen

1. Click **Sync** to retrieve new Users and Assignments
2. Click on the **Settings** icon. Verify your worksite, language, and time-out settings are correct.
3. Select the **Assignments** icon on the Menu bar or on Home Screen. Review what assignments are due soon.
4. Select the **Users** icon on the Menu bar or on the Home Screen. Make sure that you can see your employees.

Trouble Signing in?
See Pg. 11

2 Conduct Single-User Observation

1. From the **Assignments** section, select an observation for one of users with "Test" in the name
2. Review the observation instructions
3. Click **Begin** and conduct the observation:
   - Add one answer that isn't compliant
   - Take a picture and make annotations
   - Add a comment
4. Review observation selections and scoring
5. Sign as the Coach and for the Test user and click Submit



3 Sync

1. Perform a Sync

4 Complete Corrective Action

1. Navigate to the **Assignments** section
2. Filter by Status – Select "Not compliant – CA pending" and click 'Apply'
3. Select the observation with the Corrective Action pending
4. Review Corrective Action instructions – Mark corrective action complete, add notes, and click **Finish**

Coach Facilitation (Multi-User)

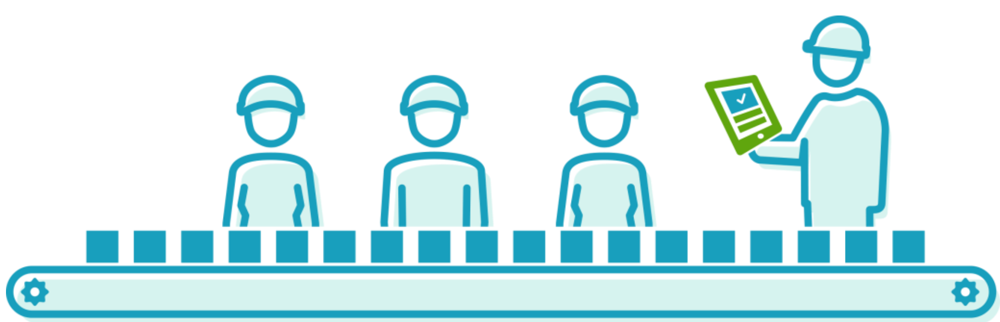
Begin Verifying Knowledge with Coach

1 Conduct Multi-User Observation

1. From the **Users** section, Filter by the "Alchemy Training Day" group
2. Select 3 users from the group and click "Choose Observation"
3. Select the "Back Injury Prevention" observation
4. Review the observation instructions
5. Click **Begin** and conduct observation
6. Use the multi-select feature to answer compliant for all questions
7. Choose one question and expand the Show Individual Answers drop-down.
8. Mark one of the employees as non-compliant for the question
9. Take a photo and add comments for that specific employee
10. Collapse the question by selecting "Hide Individual Answers"
11. Review observation selections for accuracy before submitting
12. Mark one of the employees as non-compliant for the observation
13. Sign as the coach and sign as the test users
14. Click **Submit**

2 Sync

1. Perform a Sync



Coach Reports

Stay on top of your Observation records

1 Login to Manager

1. Login to your Manager site

2 View a User's Observation Record

1. Navigate to the **User Listing**
2. Open transcript for your Test User
3. Click on the **Observation** that you conducted with the Test User to see their Observation Record

3 Detailed Observation Report

1. Navigate to **Reports**
2. **Run Reports**
3. Filter by clicking on Show: **Observations (Alchemy Coach)**
4. Select **Detailed Observation Report**
5. Select an observation and Observation version
6. Adjust the parameters as necessary, choose csv format
7. Click **Submit**

4 Individual Results for an Observation

1. Navigate to **Reports,** then **Run Reports** and go to your **Observations (Alchemy Coach)** section of reports
2. Select **Individual Results for an Observation**
3. Adjust the parameters as necessary, choose HTML format
4. Click **Submit**
5. Click on a hyperlink to open the Observation Record for the employee on that table row

5 Observation Status Report SMART

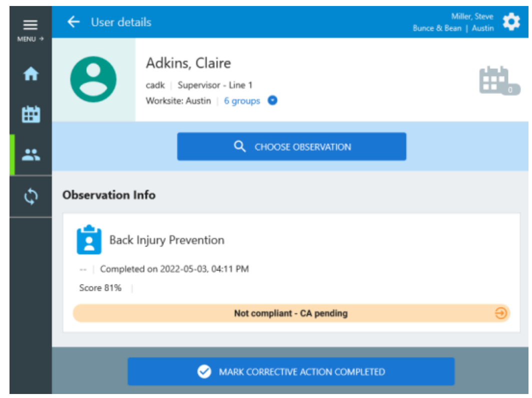
1. Navigate to **Reports**, then **Run Reports** and go to your **Observations (Alchemy Coach)** section of reports
2. Select the **Observation Status Report**
3. Use the **Report Settings Panel** on the right-hand side to adjust Filters and Columns
4. At the bottom of the Report Settings Panel, Click **Refresh** to run the report with your selected filters and columns
5. Click **SAVE AS NEW REPORT** to save those settings

Manage Pending Corrective Actions

Complete Corrective Actions

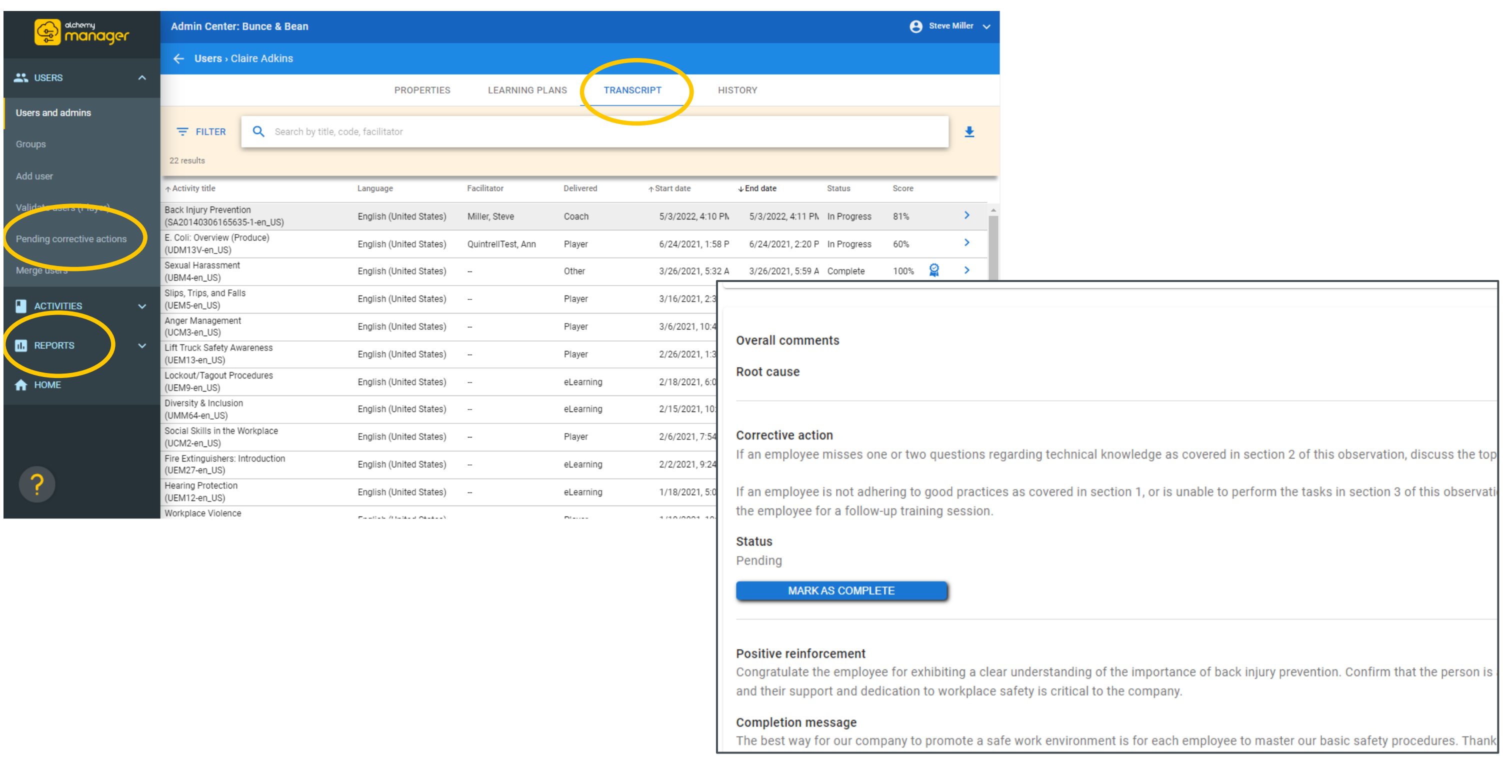
What are Corrective Actions?

- Corrective Actions (CAs) are triggered when an employee's status is "not compliant"
- CAs typically require an employee to be retrained
- An employee cannot be observed again or complete this observation until the CA is marked complete by a Coach or Admin in Manager



How can CAs be marked complete?

1. In the Coach App:
   - Select the observation with the status "In Progress – CA Pending". Select the blue **Mark Corrective Complete**, include your comments and select **Finish**
2. In Manager website, there are three options to find CAs and Mark Complete:
   - From a **User Transcript**, select the observation and scroll to the bottom to click **Mark corrective action complete**
   - Under Users on the left-hand panel, navigate to **Pending Corrective Actions**
   - In Reports, run the **Individual Results for an Observation** Report as html format. Click on the status or score of any with pending CAs



Coach Observations

Create Observations

1 Create an Observation

1. Choose an existing SOP or an existing checklist
2. In the manager website, Navigate to **Activities**
3. Select **Observations** and then click the blue **+** button in the bottom right-hand corner to create a new observation
4. Fill in the required information**:**
   - Include "Test" in the Observation Name field
   - Select the worksite name
   - Click **Add**
5. "Versions" will now appear at the bottom of the screen. Click the blue "+ New Draft" on the left-hand side

2 Edit Settings

1. In the top right-hand corner of your draft observation, click "Settings"
2. Edit your Observation Settings, such as adding in Observation instructions, adjusting your Grading options, and Requiring signatures
3. Edit your Completion Settings, such as including a Corrective Action or Positive Reinforcement
4. Click **Save**

3 Add Sections

1. In the section at the top of the screen, click the pencil icon to edit that section name
2. Input the section name and click **Save**
3. Click **Add Section** to add more sections

4 Add Questions

1. Select **Add Question**
2. Select a **Question Type** from dropdown menu
3. Type in your question in the **Question** field
4. Add notes for the coach in the **Question Notes** field
5. Click **Add**
6. Use the six dots on the top left corner of a question or section to rearrange items

5 Publish

1. Scroll to the bottom of the screen and click **Publish**

Learning Plans

Learning Plans with Observations

1 Create a Relative Date Learning Plan

1. From Activities, click on **Learning Plans**
2. Click blue **+** button in bottom right corner
3. Select **Relative Date Learning Plan** to build your own:
   — Include “Test Observation” and your Name in the Learning Plan Name
   — Fill in Completion window
   — Add at least one Alchemy Observation
   — Click **Save**

2 Attach a Relative Date Learning Plan to a Fixed Date Learning Plan

1. From Activities, click on **Learning Plans**
2. Click on **Edit** next to the Alchemy Training Day Learning Plan:
   — Select the Relative Date Learning Plan you created in the **Follow-up Relative Date Learning Plan** dropdown menu
   — Click **Save**

3 Create a Fixed Date Learning Plan for Observations

1. From Activities, click on **Learning Plans**
2. Click blue **+** button in bottom right corner
3. Select **Fixed Date Learning Plan** to build your own:
   — Include “Test Observation LP” and your name in the Learning Plan Name
   — Add at least two Alchemy activities
   — Add at least one Alchemy Observation
   — Click **Save**
4. Scroll up and click **Subscriptions** tab
5. Select the Alchemy Training Day Group, click **Save**

4 User Status: Learning Plans

1. From Users, tab click on **User Listing**
2. Find your user profile, click on **your name**, select the **Learning Plans** tab
   — Click the name of the Fixed Date Learning plan your created

Manager
Access Levels for Coach

The Manager website provides varying degrees of access to the user database and reporting for trainers and administrators of your organization. There are three levels of administrative access, including one read-only level of access. There is also the User / Facilitator level of access, which enables your employees to access eLearning.

Manager Options	Coach	Users & Facilitators	Copper (Monitor)	Silver (SupDev L1)	Gold (SupDev)	Platinum (Customer Admin)
Add Users	✗	✗	✗	✗	✓	✓
View other Users	✗	✗	✓	✓	✓	✓
Edit User profiles	✗	✗	✗	✗	✓	✓
Validate Users	✗	✗	✗	✓	✓	✓
Run Reports	✗	✗	✓	✓	✓	✓
Edit Learning Plans	✗	✗	✗	✓	✓	✓
Edit System Groups	✗	✗	✗	✓	✓	✓
Edit Observations	✗	✗	✗	✓	✓	✓
Promote Users	✗	✗	✗	✗	✗	✓
Coach App	✓	✗	✗	✗	✗	

Alchemy Support

1-888-988-8832
Support@AlchemySystems.com

US/Canada Hours:

Monday – Friday
3:00 am – 7:00 pm Central

UK Hours:

Monday – Friday
9:00 am – 1:00 am

Helpful Information

Manager:

https://www.sistemlms.com/________________________________

Username: __________________________

Password: ___________________________

Coach PIN: ___________________________

Free online training videos and tip sheets in Manager Help!