



# Training Withdrawal Options

Quick Reference Guide

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## Feature Overview

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Take control of course enrollments with the new Withdrawing Approvals feature. This enhancement empowers training administrators to customize how users withdraw from courses - whether by enabling instant withdrawals, requiring approval, or preventing them altogether. It streamlines administrative workflows, reduces unnecessary requests, and ensures compliance with training policies - all while giving users a smoother, more intuitive experience.

## When To Use This Feature

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Imagine you're managing a compliance training program where some courses are mandatory, and others are optional. For optional courses, you might want to let users withdraw freely. For mandatory ones, you may want to block withdrawals or require approval. This feature gives you the flexibility to configure each course accordingly.

# How To Use It (Step-by-Step)

## FOR TRAINING ADMINISTRATORS

### CONFIGURE WITHDRAWAL SETTINGS IN THE TRAINING CATALOG

1. Go to Admin > Menu > Training > Training Catalog Setup
2. Search and open a desired Training Catalog Item
3. Scroll down to the **Withdrawal** field set
4. Under “When withdrawing from this course:”, choose one of the following options:
  - a. **Require manual approval** - Users can request to withdraw; status becomes “Withdraw Requested”.
  - b. **Allow withdrawal without approval** - Users can withdraw instantly; status becomes “Withdrawn”.
  - c. **Prevent withdrawal entirely** - The withdrawal option is hidden from the UI and blocked from the user.

The screenshot displays the 'Training Catalog Setup' interface for a 'Sample Course'. The 'Withdrawal' section is highlighted with a red box. It contains the following options:

- When withdrawing from this course:**
  - ☐ Allow employees and managers to request withdrawal and require manual approval
  - ☐ Allow employees and managers to withdraw without further approval
  - ☐ Do not allow employees and managers to withdraw

Other visible sections include 'Internal Course Library', 'Enrollment', 'Completion', 'Price', and 'Mobile'.

5. Click **Apply** to save changes

## FOR MANAGERS

### WITHDRAWING A TEAM MEMBER

1. Go to My Teams and select the relevant team member
2. Open the course profile
3. Click **Withdraw from this course** (if available)
4. Review the updated confirmation
5. Confirm with **Yes, Withdraw**

Withdraw

Sample Course

Once you withdraw Jane Doe from this course, they will no longer be enrolled, and any progress will be lost.

**Reason** (Optional)

Are you sure you want to withdraw Jane Doe from this course?

YES, WITHDRAW
NO

## FOR EMPLOYEES

### WITHDRAWING FROM A COURSE

1. Navigate to My Activities or the Library
2. Open the course profile
3. If allowed, click **Withdraw from this course**
4. Depending on the course setting, you may see a confirmation message and be withdrawn immediately, or your request may be submitted for approval

Enrolled

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SYSTEM TRAINING

About this Course

Here is what we cover in this lesson:

- Creation of a new employee in the Employees screen.
- Deactivation, reactivation, and deletion of employees in the Employee Manager screen.
- Exporting employee information into an Excel workbook instantly in the Employee Manager screen.
- Viewing the status of employee accounts, identifying locked accounts, and assigning new temporary passwords in the System Access screen.
- Creating load bulk lists of employees in a spreadsheet format or CSV file in the Employees Upload screen.

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Preview this course...
Withdraw from this course...
Send a message about this course...
Attach a file to this course...
Contacts

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## Tips & Best Practices

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- All existing and new courses default to requiring manual approval.
- Review withdrawal settings periodically to ensure they align with training goals.
- Use clear course descriptions to inform users about withdrawal policies.
- Before rollout, test each setting to ensure expected behavior in the UI and backend.