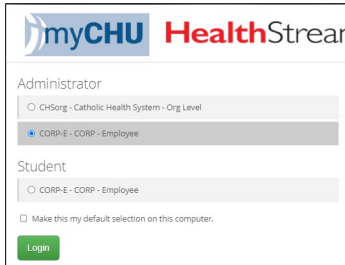


# Assigning CBLs to an Individual

**\*\*Need Admin rights to create groups. Submit a QSARF if needed.**

Creating groups to assign CBLs will make it easier for you to make bulk assignments and decrease the amount of time spent on this activity (review Assigning CBLs to a Group for reference). These directions are for the times where you need to assign education to just a single individual.

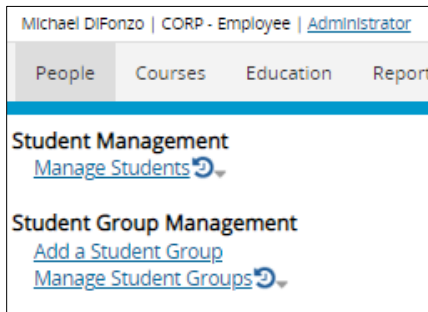
## 1. Sign in to myCHU with your Administrator Login.



The login screen for myCHU HealthStream. It features the myCHU and HealthStream logos at the top. Below the logos, there are two sections: 'Administrator' and 'Student'. Each section has a radio button and a text field. The 'Administrator' section has a radio button selected, and the 'Student' section has a radio button unselected. There is a checkbox labeled 'Make this my default selection on this computer.' and a green 'Login' button at the bottom.

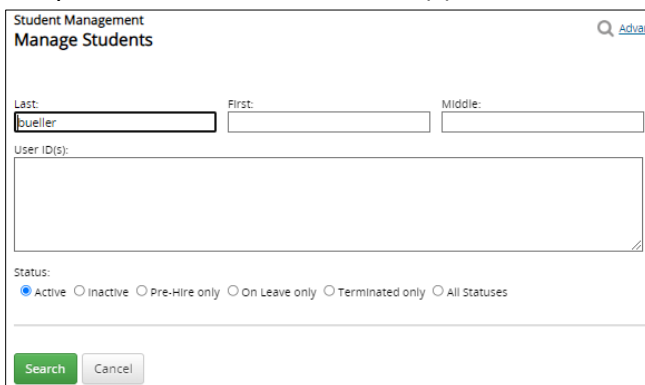
## 2. Select the “People” tab

## 3. Select “Manage Students”



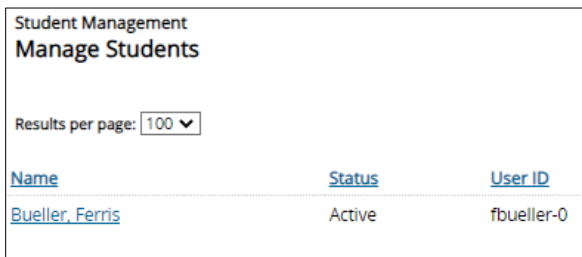
The navigation menu for myCHU HealthStream. It shows the user's name 'Michael DiFonzo' and role 'CORP - Employee | Administrator'. Below this, there are four tabs: 'People', 'Courses', 'Education', and 'Reports'. The 'People' tab is selected. Under the 'People' tab, there are two sections: 'Student Management' with a link to 'Manage Students' and 'Student Group Management' with links to 'Add a Student Group' and 'Manage Student Groups'.

## 4. You can click **Search** and all of the associates in your department will appear. You can also type their name in the Last field to search specifically for that person. Finally, if you have a list of their ADs you can paste them into the User ID (s) field.



The 'Student Management Manage Students' search form. It has a search bar with a magnifying glass icon and a link to 'Advanced Search'. Below the search bar, there are three text fields: 'Last', 'First', and 'Middle'. The 'Last' field contains the text 'Bueller'. Below these fields, there is a large text area for 'User ID(s)'. Below the text area, there is a 'Status' section with radio buttons for 'Active', 'Inactive', 'Pre-Hire only', 'On Leave only', 'Terminated only', and 'All Statuses'. The 'Active' radio button is selected. At the bottom, there are two buttons: 'Search' and 'Cancel'.

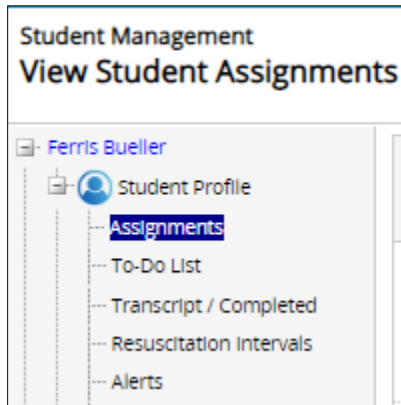
## 5. Click the associate’s name.



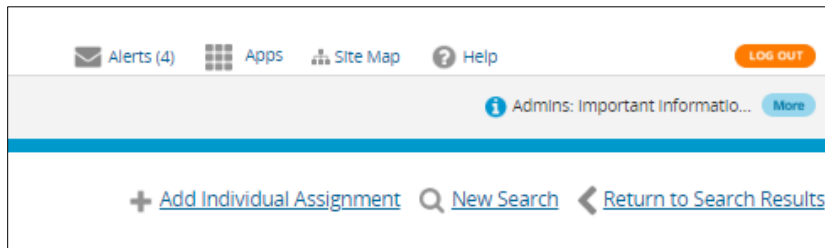
The 'Student Management Manage Students' results table. It shows a table with three columns: 'Name', 'Status', and 'User ID'. The table has one row with the following data: 'Bueller, Ferris', 'Active', and 'fbueller-0'. The table is titled 'Student Management Manage Students' and has a 'Results per page: 100' dropdown menu.

Name	Status	User ID
Bueller, Ferris	Active	fbueller-0

6. Click Assignments tab.



7. Click Add Individual Assignment (upper-right corner of screen).



Add a Group Assignment page will appear.

8. **Name this Assignment** that is clear to you. Develop a consistent naming convention.

Recommended naming convention: Department Name, Date with Year First, Details (Example: MHB 5N 2022.07 Inside Man July CBLs).

9. **Description is optional.**

10. **Select the Learning Items you wish to assign.**

- a. Under Content and Audience click Search Learning Items.

- b. Type a keyword to search for.

- c. A list of courses will be displayed. Select the individual courses that you would like to assign.

inside

Results per page: 25

Sort By: Name A to Z

☐ AWHONN POEPS - Module 01: Overview of Reproductive Health and Infertility  
Ver. 3: The purpose of Module 1 is to provide an overview of reproductive health and infertility. Pregnancy is a release an...  
Owner: HealthStream Status: Approved Expires: Jul 1, 2024  
Contains:

☒ Inside Man: S1E01 - The New Guy (Social Engineering) 2022 - CHS Associates  
Ver. 1: The Khromacom IT team frantically attempts to deal with a cyber-attack when, seemingly out of nowhere, to joi...  
Owner: Catholic Health System - Org Level Status: Approved Expires: Jan 31, 2023  
Contains:

☒ Inside Man: S1E02 - Social Hour (Social Media) 2022 - CHS Associates  
Ver. 1: Mark begins his new job at Khromacom, receiving his badge and meeting his new co-workers. Ed assign...  
Owner: Catholic Health System - Org Level Status: Approved Expires: Jan 31, 2023  
Contains:

- d. Click Select

Select Check All Current Search Results Clear All Selected Items

- e. The selected courses have been added to the Learning Items for assignment.

Content and Audience

Learning Items \* [Search Learning Items...](#)

Students are enrolled into the active version of a learning item when they select it on their To-Do List.

☒ Inside Man: S1E01 - The New Guy (Social Engineering) 2022 - CHS Associates

☒ Inside Man: S1E02 - Social Hour (Social Media) 2022 - CHS Associates

- f. You can add multiple learnings to this assignment. To add more courses, click Search Learning Items again and search for another course to add to this assignment.

Content and Audience

Learning Items \* [Search Learning Items...](#)

Students are enrolled into the active version of a learning item when they select it on their To-Do List.

☒ Inside Man: S1E01 - The New Guy (Social Engineering) 2022 - CHS Associates

☒ Inside Man: S1E02 - Social Hour (Social Media) 2022 - CHS Associates

☒ Security Awareness Fundamentals 2022 - New Hire Associates

## Select the Dates and Settings

11. **Assignment Type:** One-Time Assignment
12. **Go-Live Date:** this is the date the education will be pushed to your team. **Use the Fixed: Go Live on** (this is the date the courses will appear on their To Do tab for them to take the course).
13. **Due Date:** This would typically be the end of the month the education is assigned. You may reference the CBL announcement sheet for due dates. You will receive overdue alerts based on this date. Also, managers can logon to their student account and review the My Teams tab to review associates that are approaching upcoming due dates.
14. **End Date:** Associates would NOT be able to complete the assignment past the end date. Select the date carefully. You may want to allow them to have a month past the Due Date to complete or even the end of the year.
15. **Effective Date:** Enter a date in the past to provide credit for anyone that may have already completed the course prior to this assignment. This ensures they aren't taking the course a second time. In most cases, the recommended practice is to apply completions from the first of the year.

The screenshot shows a form titled "Dates and Settings" with the subtitle "Set the Assignment Window". It contains several sections: "Assignment Type" with radio buttons for "One-Time Assignment" (selected) and "Recurring Assignment"; "Go-Live Date" with a "Fixed: Go-live on" date field set to 7/7/2022 and a "Flexible: Go-live" option with a dropdown for "Hire/Active Date" and a "beginning" date field set to 7/7/2022; "Due Date" with a "Due on" date field set to 07/31/2022 and a "Due" option with a dropdown for "Hire/Active Date" and a "30 days after" field; "End Date" with an "End on" date field set to 12/31/2022; and "Effective Date" with an "Apply completions since" date field set to 1/1/2022.

16. Click Save.

The screenshot shows a row of five buttons: "Save" (green), "Save and Add Another" (green), "Copy" (grey), "Grant Assignment Exemptions" (grey), and "Cancel" (grey).

17. A message that the assignment is currently processing will be displayed. You can navigate away from the page.

The screenshot shows a system message box with a green checkmark icon and the text "The Assignment criteria have been saved." Below this is a blue information icon and the text "The system is currently processing your assignment. Processing is 0% complete. It is safe to leave this page or close your browser. You can check the status of your request in the Request Manager." There is a "Refresh" button next to the message. At the bottom right, there is a "Working..." status indicator with a circular arrow icon.

Congratulations, you have now successfully assigned education out to this individual. Because it has been assigned to your associate, you will now be able to track completion status from your My Team tab.