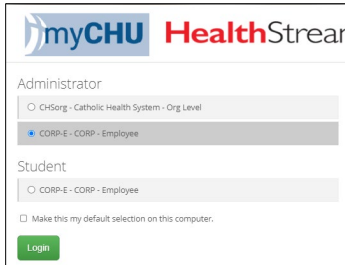


# Assigning CBLs to an Individual

\*\*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.

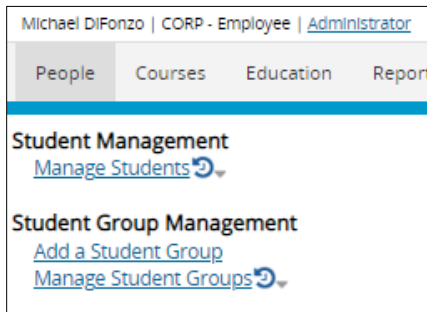
## 1. Sign in to myCHU with your Administrator Login.



The screenshot shows the myCHU HealthStream login interface. It features a header with the myCHU logo and HealthStream text. Below the header, there are two sections: 'Administrator' and 'Student'. The 'Administrator' section has a radio button selected for 'CORP-E - CORP - Employee'. The 'Student' section has a radio button selected for 'CORP-E - CORP - Employee'. There is also a checkbox for 'Make this my default selection on this computer.' and a green 'Login' button at the bottom.

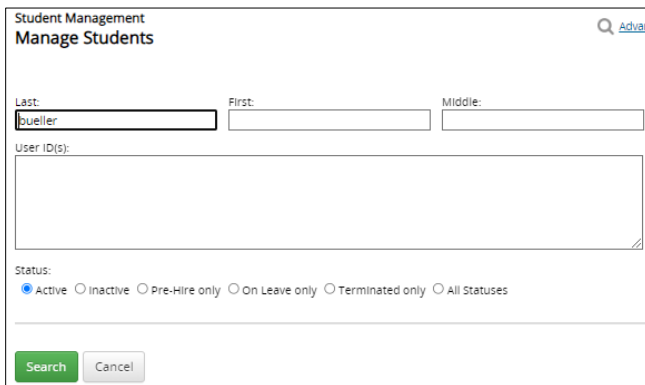
## 2. Select the "People" tab

## 3. Select "Manage Students"



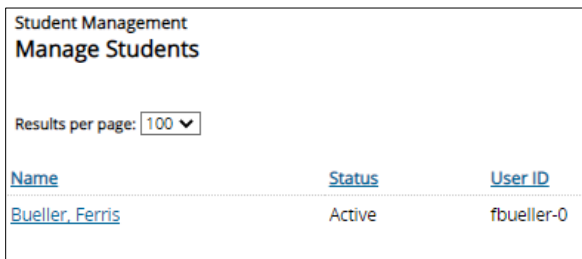
The screenshot shows a navigation menu for a user named Michael DiFonzo, who is a CORP - Employee and Administrator. The menu includes tabs for 'People', 'Courses', 'Education', and 'Reports'. Under the 'People' tab, there are two main sections: 'Student Management' with a link to 'Manage Students' and '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 screenshot shows the 'Manage Students' search form. It includes a search icon and an 'Advanced' link. There are three input fields for 'Last', 'First', and 'Middle'. The 'Last' field contains the text 'Bueller'. Below these fields is a large text area for 'User ID(s)'. 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 'Search' and 'Cancel' buttons.

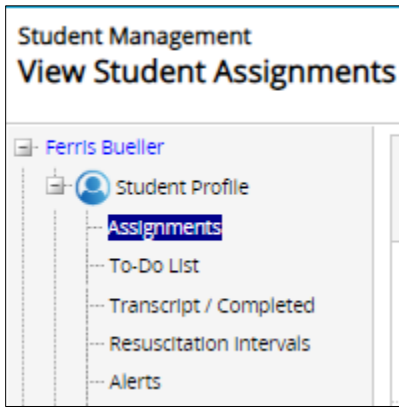
## 5. Click the associate's name.



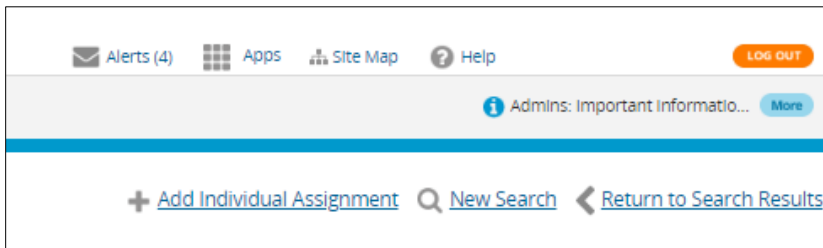
The screenshot shows the search results for 'Manage Students'. It includes a 'Results per page' dropdown set to '100'. Below this is a table with three columns: 'Name', 'Status', and 'User ID'. The table contains one row with the following data:

Name	Status	User ID
<a href="#">Bueller, Ferris</a>	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 Someo...  
Owner: Catholic Health System - Org Level Status: Approved Expires: Jan 31, 2023  
Contains:

- d. Click Select

- 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 due 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 following sections:

- Set the Assignment Window**
- Assignment Type**  
How often should this assignment occur?  
 One-Time Assignment  
 Recurring Assignment
- Go-Live Date \***  
When should this assignment first appear on each person's To-Do list?  
 Fixed: Go-live on   
 Flexible: Go-live  days after each individual's  beginning
- Due Date \***  
For recurring assignments, this is the initial due date.  
 Due on   
 Due  days after
- End Date \***  
Prevent satisfaction of this assignment after this date.  
End on
- Expand the Assignment Window**
- Effective Date \***  
The assignment begins looking for completions from this date forward.  
By setting this to an earlier date, existing completions will satisfy this assignment.  
Apply completions since

16. Click Save.

The screenshot shows a row of 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 "Group Assignment Management" window with the following messages:

- A green success message: "The Assignment criteria have been saved."
- A blue information message: "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." with a "Refresh" button.
- A "Working..." indicator with a loading spinner.

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.