



Admin Reference Manual

v2021.09.22

Click the below links to go directly to that section. NOTE: You need Administrator rights to complete these functions.

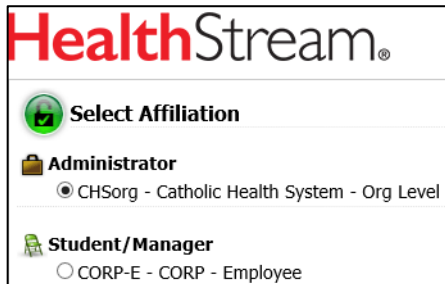
Contents

- CREATING ASSIGNMENT GROUPS 2
- ASSIGNING CBLS TO A GROUP 6
- CREATING ONE-TIME INDIVIDUAL ASSIGNMENTS.....10
- AVOIDING DUPLICATE ASSIGNMENTS.....12
- ASSIGNING/REGISTERING INDIVIDUALS TO LIVE CLASSES14
- CHECKING CLASS REGISTRATION17
- UNASSIGNING EDUCATION19
- ADMINISTRATOR LOGIN19
- USING THE PEOPLE TAB.....19
- SEARCHING FOR A STUDENT20
- STUDENT MANAGEMENT TABS: ASSIGNMENTS, MY LEARNING, MY TRANSCRIPT20
 - Assignments 20
 - My Learning 21
 - My Transcript 21
- REMOVE EDUCATION.....22
 - (1) Grant an Exemption 22
 - (2) End an Assignment 23
 - End Date 24
 - Unenroll 25
- REPORTS: RUNNING COURSE COMPLETIONS AND REOCCURRING REPORTS26
- SCHEDULING A REPORT29
 - Education Reports Resource:..... 30
- REPORTS: RUNNING STUDENT TRANSCRIPTS.....31
 - MyTeam Dashboard 31
 - Administrator Reports: Running Individual Transcripts From People Tab 32
 - Administrator Reports: Running Multiple Transcripts From Reports Tab..... 34

Creating Assignment Groups

The reason you want to create student groups is to make it easier to assign education to a group of people all at the same time. I recommend setting up your groups based on how you typically assign education. **For example:** you may want individual groups for RNs, NAs, UCs, ITAs if you assign specific education to them (please think about the monthly CBLs you will be pushing out to them).

1. Sign in to **myCHU Administrator** page



2. Click on the People tab



3. Click on Add a Student Group

In this section you may create specific groups as you desire. Potential opportunities could be groups such as: RNs on 5N at MHB, NAs on ____, UC on ____, etc. You want to be specific in your naming so you may easily identify your group.

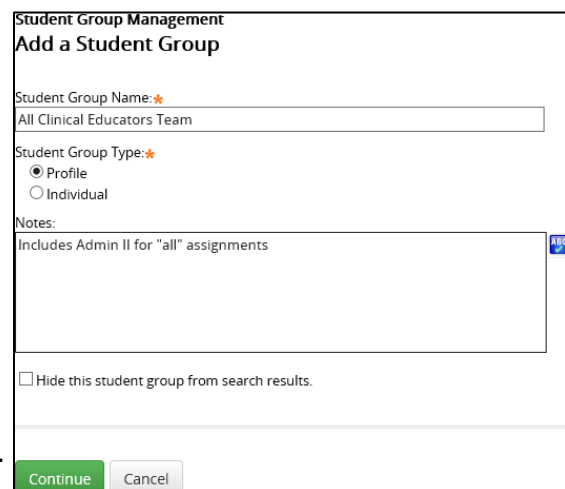
a. **Enter the name of your student group (include Site and Department location)**

b. **Student Group type – I would recommend you use the “Profile radial dial”** – this will allow for the system to automatically add new hires and subtract terminations into your group. If you select “Profile” you will be requiring all current and new hires in the job codes in your department to complete any assigned education going forward.

c. **Student Group Type – Individual** – this is a one-time snapshot of the current people that you add. New hires will not be added to this group. If this is a onetime requirement (what most of the monthly CBLs are) – make sure you create an Individual Student Group Type.

d. **Notes** – not required

e. **Click on continue**



You are now on the “Select Students to Include” page.

4a. You will get a new screen where you may **confirm your GL code.**

The screenshot shows the 'Select Students to Include' page for the group 'RNs on MHB 5MW test test test'. The filters are as follows:

- Department:** All Departments, 9008292-Clinical Education
- Job Title:** All Job Titles. Selected titles include: 2093-Account Representative First Choice Client Services, 434-Accountant, 1195-Accountant N, 1614-Accounting Clerk, 435-Accounts Payable Specialist, 433-Accounts Receivable Billing Specialist RMC, 1166-Accounts Receivable Clerk CCD, 440-Administrative Assistant, and 907-Administrative Assistant II.
- Job Category:** All Job Categories. Selected categories include: Admissions, Assessment and Referral Staff, Athletic Trainer, Audiologist, Behavioral Therapist, Billing/Coding Personnel, Board of Directors or Board Member, Cardiovascular Technologist and Technician, Cashiers, and Chemical Dependency Counselor.
- Primary ID:** All Primary ID. Selected IDs include: ABROWN10, ABRUNNER, ARIVERAS, ASKIPPER2, ATHOMAS4, AWILLIAMSLUPER, BDUQUAY, BREITWIESER, CPYSE1, DFRANKLI, and DUNNED.
- Working Location:** All Working Location. Selected locations include: ARTC, CANISIUS, CHS, EXEC, FR BKR MNR, KMH, LIFE OLV, MACC, MARIAN, MCCS, and MHP.

DON'T CHANGE ANYTHING IN ANY OF THE OTHER BOXES

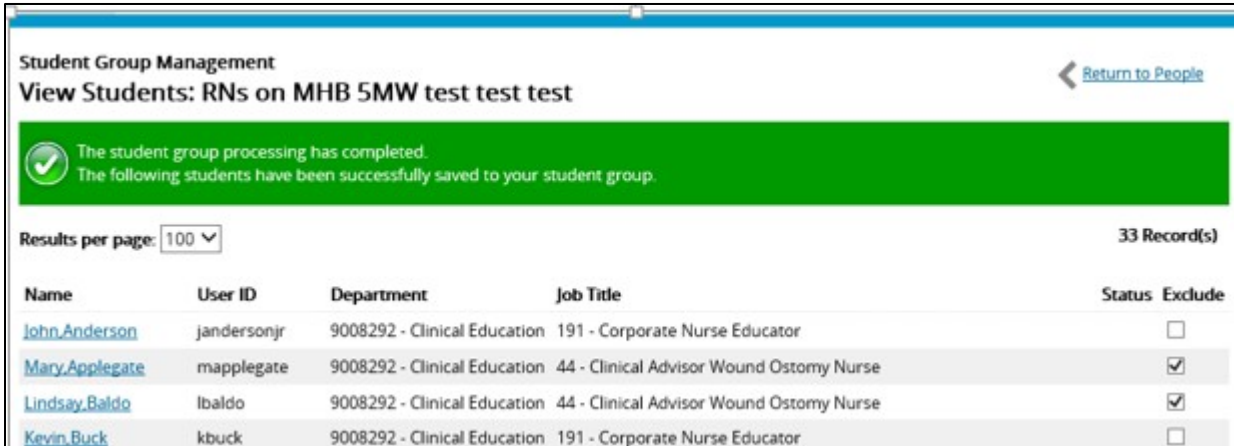
4b. Make sure you click on “**Save**” on the bottom of the page.

You will now see a listing of ALL associates within your GL department. Go through the list and put a check in the box of anyone you want to exclude. For example, if I only wanted RNs in the group, I would exclude anyone in the dept. who was not a RN. In the screenshot below, I excluded people who were not Clinical Educators.

The screenshot shows the 'View Students' page for the group 'RNs on MHB 5MW test test test'. A green message states: 'The student group processing has completed. The following students have been successfully saved to your student group.' The table below lists 33 records, with the 'Exclude' column checked for non-clinical educators.

Name	User ID	Department	Job Title	Status	Exclude
John Anderson	jandersonr	9008292 - Clinical Education	191 - Corporate Nurse Educator		<input type="checkbox"/>
Mary Applegate	mapplegate	9008292 - Clinical Education	44 - Clinical Advisor Wound Ostomy Nurse		<input checked="" type="checkbox"/>
Lindsay Balda	lbaldo	9008292 - Clinical Education	44 - Clinical Advisor Wound Ostomy Nurse		<input checked="" type="checkbox"/>
Kevin Burk	kburck	9008292 - Clinical Education	191 - Corporate Nurse Educator		<input type="checkbox"/>
Brianna Burt	tburt	9008292 - Clinical Education	632 - Patient Educator		<input checked="" type="checkbox"/>
Dizabeeth Clark	eclark1	9008292 - Clinical Education	44 - Clinical Advisor Wound Ostomy Nurse		<input checked="" type="checkbox"/>
Amy Davis	adavis9	9008292 - Clinical Education	1697 - Corporate Educator Catholic Health University ARTC		<input checked="" type="checkbox"/>
Tammy Dickman	tdickman	9008292 - Clinical Education	44 - Clinical Advisor Wound Ostomy Nurse		<input checked="" type="checkbox"/>
Michael DiFonzo	mdifonzo	9008292 - Clinical Education	1875 - Coordinator Instructional Design and Online Learning		<input checked="" type="checkbox"/>
Wendy Fechter	wsokol	9008292 - Clinical Education	44 - Clinical Advisor Wound Ostomy Nurse		<input checked="" type="checkbox"/>
Karen Ferrilli	kferrilli	9008292 - Clinical Education	912 - Administrative Assistant III		<input checked="" type="checkbox"/>
Katie Elk	kchandle	9008292 - Clinical Education	44 - Clinical Advisor Wound Ostomy Nurse		<input checked="" type="checkbox"/>
Mark Giamresporio	mgiamresporio1	9008292 - Clinical Education	1719 - Clinical Advisor Wound Ostomy Nurse N		<input checked="" type="checkbox"/>
Theresa Hurd	thurd	9008292 - Clinical Education	1980 - Director Inpatient Wound Care & Diabetic Care Services		<input checked="" type="checkbox"/>
Armanika Jaxim	ajaxim	9008292 - Clinical Education	2018 - Educator Pulmonary Disease		<input checked="" type="checkbox"/>
Megan Kosmoski	mkosmoski	9008292 - Clinical Education	632 - Patient Educator		<input checked="" type="checkbox"/>
Hil Mai Sween	jmaicsween	9008292 - Clinical Education	817 - Staff Educator		<input type="checkbox"/>
Steven Marks	smarks	9008292 - Clinical Education	603 - Vice President Clinical Education & Professional Development		<input checked="" type="checkbox"/>
Melissa Molnar	mmolnar	9008292 - Clinical Education	44 - Clinical Advisor Wound Ostomy Nurse		<input checked="" type="checkbox"/>
Sophia Overton	soverton1	9008292 - Clinical Education	632 - Patient Educator		<input checked="" type="checkbox"/>
Amy Peterson	apeterso	9008292 - Clinical Education	191 - Corporate Nurse Educator		<input type="checkbox"/>
Linda Pollinger	lpollinger	9008292 - Clinical Education	817 - Staff Educator		<input type="checkbox"/>

4c. Click on “Save”. You will get a notification that your group with the exclusions incorporated have been saved

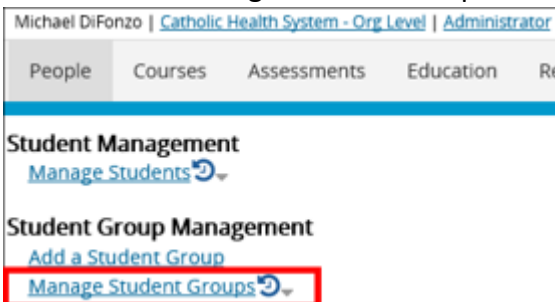


4D. Click on “Save”

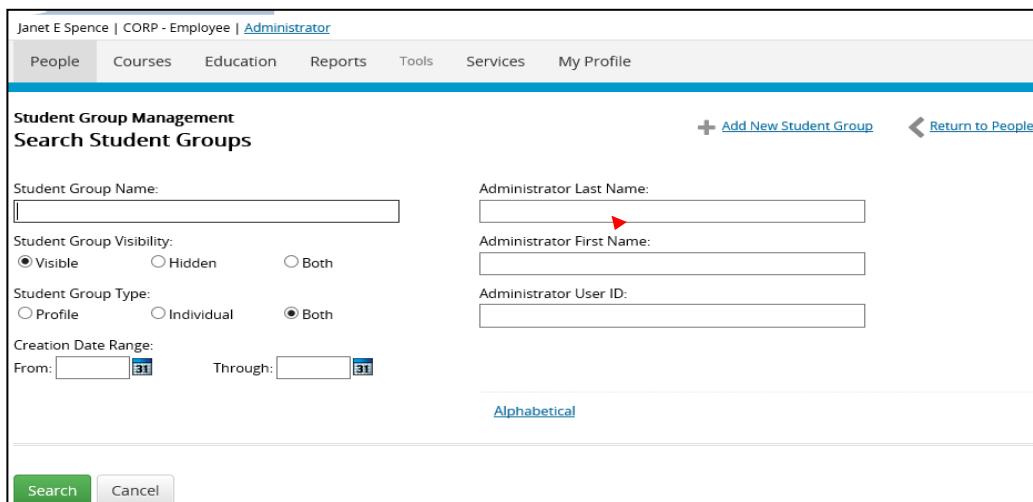
Congratulations, you have successfully created a group to making assigning of education quicker.

If you want to verify that your group is really in the system and set up the way you want, you may easily check this.

1. Click on the my Administrator page, click on the People Tab
2. Click on “Manage Student Groups”



3. You will get the screenshot below:



I find the easiest way to find my groups is to enter my name in the “Administrator Last

Name" section, then hit search.

A listing of all the groups I have developed are listed at the bottom of the page. I can click on the group name to see who is a member of the group. I may also complete the options listed to the right of the name.

The screenshot shows the 'Student Group Management' interface. At the top, there is a navigation bar with 'People' selected. Below it, the 'Search Student Groups' section contains several filters: 'Student Group Name' (empty), 'Administrator Last Name' (spence), 'Student Group Visibility' (Visible selected), 'Administrator First Name' (empty), 'Student Group Type' (Both selected), 'Administrator User ID' (empty), and 'Creation Date Range' (From and Through empty). A 'Search' button is visible. Below the search filters, there is a table with 3 records. The first record is 'Clinical Education Maternal Child Educators' with 5 members. The second is 'Clinical Educators for Acute Care' with 10 members. The third is 'RNs on MHB 5MW test test test' with 33 members. Each record has options to 'View Assignments', 'View Checklists', 'Edit', 'Copy', and 'Delete'.

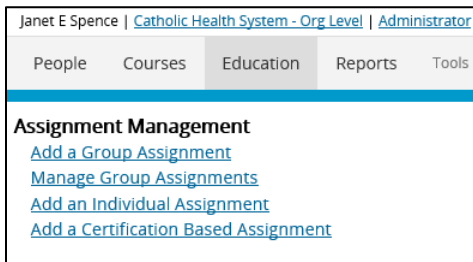
Name	Options
Clinical Education Maternal Child Educators Count: 5, Type: Profile, Affiliation: Enterprise, Last Updated: 01/07/2020 02:38 PM, Updated By: Janet E Spence	View Assignments View Checklists Edit Copy Delete
Clinical Educators for Acute Care Count: 10, Type: Profile, Affiliation: Enterprise, Last Updated: 12/18/2019 11:50 AM, Updated By: Janet E Spence	View Assignments View Checklists Edit Copy Delete
RNs on MHB 5MW test test test Count: 33, Type: Profile, Affiliation: Institution, Last Updated: 01/14/2020 02:51 PM, Updated By: Janet E Spence	View Assignments View Checklists Edit Copy Delete

As you can see, the group I just created (RNs on MHB 5MW test test test) is readily available for me to use.

Assigning CBLs to a Group

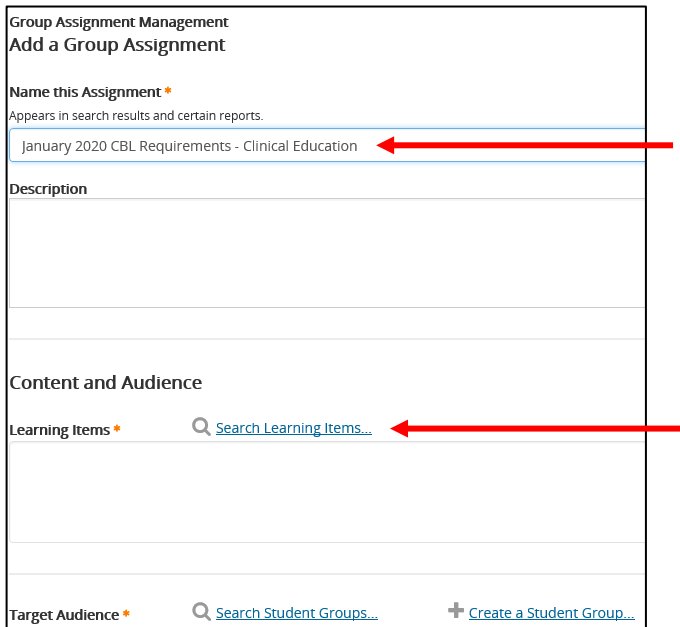
Using groups to assign CBLs will make it easier for you to make assignments and decrease the amount of time spent on this activity. **Since you have assigned the education, you will be able to track on your My Team tab if they are completing the required education on time.**

1. Sign on to myCHU Administrator
2. Select the “Education” tab
3. Select “Add a Group Assignment”



You will be doing multiple actions once you open the “Add a Group Assignment” page.

Create a title for the assignment that is clear to you. For the monthly CBLs I recommend you develop a consistent naming convention that also includes the site and department location. A description is not required but can be helpful.



The screenshot shows the 'Add a Group Assignment' form. At the top, it says 'Group Assignment Management' and 'Add a Group Assignment'. Below this is a section titled 'Name this Assignment *' with a note that it 'Appears in search results and certain reports.' There is a text input field containing 'January 2020 CBL Requirements - Clinical Education', with a red arrow pointing to it. Below this is a 'Description' field. Further down is a section titled 'Content and Audience' with a 'Learning Items *' field. This field has a search icon and the text 'Search Learning Items...', with a red arrow pointing to it. At the bottom of the form, there is a 'Target Audience *' field with a search icon and the text 'Search Student Groups...', and a '+ Create a Student Group...' button.

4. Select the education you wish to assign

- a. You can add multiple learnings to the whole group at the same time. You may type in the name of the CBL or you may search for it. I think searching is easier – you decide for yourself.
- b. Select the items you want to be completed by clicking “Search Learning Items”. In this example, I am searching for hand hygiene. Even though I didn’t use the full title, I received multiple choices related to this topic.

Group Assignment
Browse

[Alphabetical](#) | [Category](#)

Effective Hand

Select the education you want included by check marking the box in front of the course and then click on **“Select”**.

Results per page: 25

Name

Effective Hand Hygiene

Perspectives on Prevention: The Perioperative Environment - CNE 1.3 Co

Legend:

Online Test Evaluation Course Attachment

To add an additional CBL:

Once you click on the **“Select”** icon, you will be brought back to the **“Add a Group Assignment”** tab. Follow the process above (Search Learning Items, search for the name of the CBL you want added, put a checkmark in the box in front of the desired education and click on Select). You may do this multiple times as needed.

Example of multiple CBLs to be pushed out to associates to be completed:

Group Assignment Management
Add a Group Assignment

Name this Assignment *
Appears in search results and certain reports.

January 2020 CBL Requirements - Clinical Education

Description

Content and Audience

Learning Items *

Effective Hand Hygiene

Dangerous Person Policy and Video

Target Audience *

Once you have selected all of the education you want to assign to your group, it is now time to select the Target Audience.

5. Select your Target Audience

- a. Typically, you will search for your previously developed student group.
 - i. If you don't yet have a group and want to build one, click on the "Create a Student Group" hyperlink and build it (you may review the "Creating Assignment Groups, if you like, as a reference).
- b. You could select your previously created student group and assign the CBL to all of the people assigned to that group all at once.

The following material will be displayed:

Target Audience * [Search Student Groups...](#)

Group Assignment
Search Student Groups

Student Group Name:

Administrator Last Name:

Student Group Visibility:
 Visible Hidden Both

Administrator First Name:

Student Group Type:
 Profile Individual Both

Administrator User ID:

Creation Date Range:
From: Through:

[Alphabetical](#)

There are multiple ways to search for your group – do what works best for you. Some choices:

- A. Type in the Student Group Name (must match your group's name)
- B. Put your name in the "Administrator Last Name section" (I think this is the easiest way as you will see all the groups that you have developed)
- C. Search using the Alphabetical hyperlink

Use any of those methods and then click the "Search" icon

In this example, I search by the administrator (my) name.

Your group will be displayed at the bottom of the page. Put a checkmark in the box in front of the name and then click on "Select"

Group Assignment [Return To Group](#)

Search Student Groups

Student Group Name:

Administrator Last Name:

Student Group Visibility: Visible Hidden Both

Administrator First Name:

Student Group Type: Profile Individual Both

Administrator User ID:

Creation Date Range: From: Through:

[Alphabetical](#)

Results per page: 100

Name	Options
<input checked="" type="checkbox"/> Clinical Educators for Acute Care <small>count: 15, Type: Profile, Affiliation: Enterprise, Last Updated: 12/18/2019 11:50 AM, Updated By: Janet E spence</small>	View Assignments View Checklists Edit

Selecting the Dates and Settings

You will now be selecting the date the education will be sent out (the system defaults to the next day, not the current day so be careful to select the date you want this pushed out) as well as the due date.

Content and Audience

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

Effective Hand Hygiene

Dangerous Person Policy and Video

Target Audience [Search Student Groups...](#) [+ Create a Student Group...](#)

[Clinical Educators for Acute Care](#)

Dates and Settings

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

6. **Assignment Type** – typically pick “One-Time Assignment”
7. **Go-Live Date** – this is the date the education will be pushed to your team. **Use the “Fixed: Go Live on”**
8. **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
9. **End Date (optional)** – (Not Recommended). If you choose this associates would NOT be able to complete the assignment past the due date

This is an example of a completed form:

Dates and Settings

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

Due Date *
For recurring assignments, this is the initial due date.

Due on

Due days

End Date *Optional*
Prevent satisfaction of this assignment after this date.

End on

Creating One-Time Individual Assignments

1. Sign in to **myCHU Administrator** page

Select Affiliation

Administrator

CHSorg - Catholic Health System - Org Level
 TRN - Training

Student/Manager

CORP-E - CORP - Employee

2. Click on the **People Tab**

Valerie Sobolewski | [Catholic Health System - Org Level](#) | [Administrator](#)

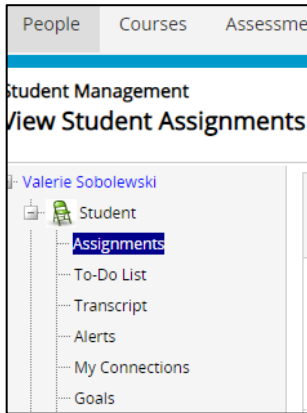
People Courses Assessments Education Reports Tools Services My

Student Management
[Manage Students](#)

Student Group Management
[Add a Student Group](#)
[Manage Student Groups](#)
[Manage Student Group Roles](#)

3. Click on **Manage Students**

Search for the student you want to create an assignment for and bring up their information page. Click on **Assignments**.



4. On the right side of the page click on **Add Individual Assignment**



5. Type **Assignment Name**, which appears in search results for reports, no description necessary, and search for **Learning Items** that are to be included in this assignment.

A form for creating an assignment. It has three main sections: 1. 'Name this Assignment *' with a sub-note 'Appears in search results and certain reports.' and an empty text input field. 2. 'Description' with a large empty text area. 3. 'Learning Items *' with a search icon and the text 'Search Learning Items...' and an empty list area below.

6. This will be a **One-Time Assignment**. The **Go-Live Date** will be when the assignment drops to the user's To-Do List. Use a **fixed Due Date** for when the assignment must be completed by. If an **End Date** is inserted, the user will no longer be able to complete the assignment after this date. Enter an **Effective Date** to account for the users' completion of the Learning Items prior to the Go-Live Date. For Example, if the user completed the assignment 30 days prior to the new assignment being added, they will be given credit for completing the newest assignment. **Click Save**. The Assignment will show up on the user's To-Do List when the Go-Live Date comes up.

Dates and Settings

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 this person's To-Do list?

Fixed: Go-live on

Flexible: Go-live days after this individual's

Due Date *
For recurring assignments, this is the initial due date.

Due on

Due days after

End Date *Optional*
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

Note: End Date - This will prevent satisfaction of this assignment after this date. If the student has never clicked on the course, it will be removed from their To-Do List. If the student clicked on the course and is In Progress Status, it will move from Assigned to their Elective Learning. The student may un-enroll from the course.

Avoiding Duplicate Assignments

Expand the Assignment Window

You will want to make sure that you do not re-assign this education to anyone that may have already completed the learning prior to your assignment. Students may have already completed the assignment by self-enrolling or the education may have been assigned by the Learning Management System (LMS) Administrator. If you do re-assign the education, the CBL will appear on their To Do tab even though they have already completed it.

Under the "Expand the Assignment Window > Effective Date" enter a past date so that any past completions will fulfill the completion requirements of your assignment.

In this example, entering 1/3/2020 will apply the completions to anyone that completed the learning **prior** to 1/3/2020 and give them credit for course completion. They will not be assigned this specific education again under your specific Group Assignment.

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

As you scroll down the page, you will see the default response if someone fails a course is set to “Automatically reassign the course”. This is the recommended selection.

Options

Failed Courses

What should happen if a student fails an assigned course?

Automatically reassign the course.

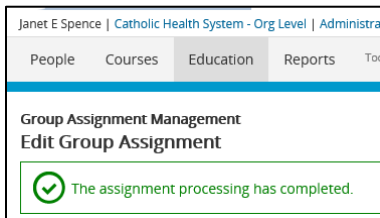
Do not reassign a failed course.

Verify all of your settings. Once an assignment goes “live” the settings cannot be edited!

Click on “Save”.

It will take a little bit of time for the education to be pushed out – don’t be surprised by the blue message telling you the request is in progress.

Once it is sent, you will get a message that the assignment process was completed.



Congratulations, you have now successfully “pushed” education out to your desired team. Because it has been assigned to your associates, you will now be able to track completion status from your “My Team” tab.

Assigning/Registering Individuals to Live Classes

This tool will be beneficial to managers/supervisors who assign students to classes.

1. You must log in as **Administrator**

Note: This is NOT the MyTeam Dashboard

Select Affiliation

Administrator

CHSorg - Catholic Health System - Org Level

Student/Manager

CORP-E - CORP - Employee

Make this my default selection on this computer.

Proceed with Login

2. Go to the **Education** Tab and select **Manage Classes**

People Courses **Education** Reports Tools Services My Profile

Assignment Management

[Add a Group Assignment](#)

[Manage Group Assignments](#)

[Add an Individual Assignment](#)

[Add a Certification Based Assignment](#)

Class Management

[Manage Classes](#)

3. Search the class you're assigning under **Class Name** and **un-check** Class Affiliation (in this example, Catholic Health System - Org Level)

People Courses **Education** Reports Tools Services My Profile

Class Scheduling

Search for Classes

Classroom Information

Class Name:

Course Identifier:

Course Name:

Class Affiliation: Catholic Health System - Org Level Select All

[Search Affiliations](#) Include Subsidiary Affiliations

Session Date Range: From: Through:

Instructor First Name:

Instructor Last Name:

Building Name:

Class Type: Classroom

Grading Status (Search Visibility): Grading Not Complete (Visible) Grading Complete (Hidden) All Classes

Additional Options: Show Only Active Course Versions

A list of classes that are available for you to Register students in is displayed. Select the appropriate class date and time. Click **Register** on the right.

Class Scheduling
Search for Classes [Previous Search](#)

Results per page: 25 << Previous 1 2 Next >> 45 Record(s)

Basic Cardiac Rhythm Day 1 of 3 Series A

From: 1/13/2020 7:30 AM To: 1/13/2020 3:30 PM ET 1 session
 Course Name - ID: Cardiac Rhythm (ver. 1)
 Current Registration/Class Size: 18/20
 Building (Room): C H A R T C (CHARTC 1D)
 Instructors: Janet E. Spence
 Owner: Catholic Health System - Org Level
 Created by: Carol Webster on Nov 24, 2019 1:15PM ET
 Updated by: Carol Webster on Dec 19, 2019 12:35PM ET

[Register](#) [Manage Registrations](#) [Grade](#) [Copy](#)

Basic Cardiac Rhythm Day 1 of 3 Series A

From: 2/10/2020 7:30 AM To: 2/10/2020 3:30 PM ET 1 session
 Course Name - ID: Cardiac Rhythm (ver. 1)
 Current Registration/Class Size: 2/20
 Building (Room): C H A R T C (CHARTC 1D)
 Instructors: Sarah I Sattler
 Owner: Catholic Health System - Org Level
 Created by: Carol Webster on Dec 4, 2019 11:18AM ET
 Updated by: Carol Webster on Dec 31, 2019 9:30AM ET

[Register](#) [Manage Registrations](#) [Grade](#) [Copy](#)

4. Search for the individual you're assigning.

Class Scheduling
Register Students [Advanced Search](#) [Return to Classes](#)

Last: First: Middle:

User ID(s):

Status:
 Active Inactive On Leave All

[Search](#) [Cancel](#)

5. Select the appropriate individual and click **Continue**

Class Scheduling
Register Students [New Search](#) [Previous Search](#)

Results per page: 100 1 Record(s)

Select	Name	Status	User ID	Job Category	Affiliation	Last Login Date
<input checked="" type="checkbox"/>	Sattler, Sarah I	Active	schong	Uncategorized	CORP-E - CORP - Employee (9008292 - Clinical Education)	12/31/2019 10:54:00 AM

[Continue](#) [Check All Current Search Results](#) [Clear All Selected Results](#)

6. Make sure to verify that you are signing up the correct individual to the correct class.

7. Once completed, click **Register**.

Class Scheduling

Register Students

[Edit Class](#) [Roster](#) [Manage Registrations](#) [Return](#)

Course Name: Cardiac Rhythm
Course Version: 1 Owner: Catholic Health System - Org Level

Basic Cardiac Rhythm Day 1 of 3 Series A

Start Date: 2/10/2020 7:30 AM ET **Registered:** 2 students in this class **1 record(s)**
End Date: 2/10/2020 3:30 PM **Available Seats:** 18 **1 selected**
Sessions: 1 session **Waitlist Option?:** Yes: 0 students on waitlist

Students with a check will be registered for this class and will be dropped from any other registered class.

Register?	Name	User ID	Registered	Class Information - Date, Name & Class Affiliation	Status
<input checked="" type="checkbox"/>	Sarah I Sattler	schong	No		Active

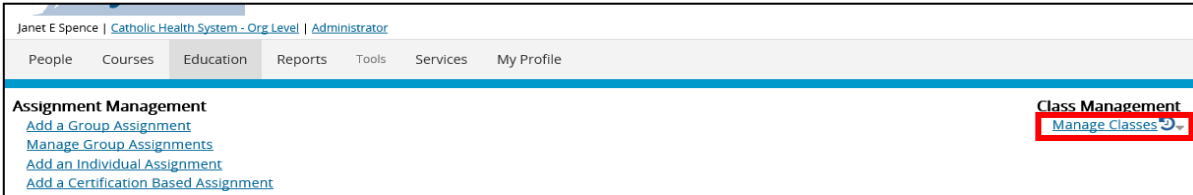
[Register](#) [Select All](#) [New Search](#) [Clear All Selected](#)

Checking Class Registration

This will show you how to check a specific class, the number of registrants, and all who have enrolled in this class. This report typically is used by educators, managers/supervisors.

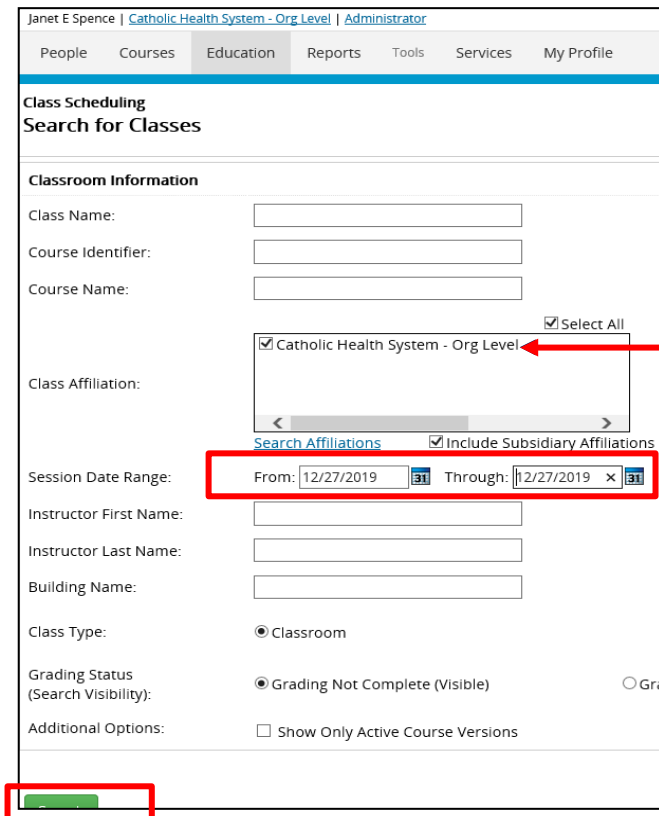
Sign in to myCHU as an Administrator.

1. Click on **“Education”** tab
2. Click on **“Manage Classes”** under the **Class Management** section



3. You can approach the next step in either of 2 ways- **The First Way**

3-1. Enter date of class



The screenshot shows the 'Class Scheduling Search for Classes' form. The 'Session Date Range' field is highlighted with a red box and contains the date range 'From: 12/27/2019 Through: 12/27/2019'. A red arrow points to the 'Class Affiliation' dropdown menu, which is currently set to 'Catholic Health System - Org Level' and has a 'Select All' checkbox checked. A red box is also present at the bottom left of the form.

If the Class Affiliation box is checked: uncheck it.

- a. Click on the green **“Search”** button



- b. Find the class in which you want to know the registration for. Click on **“Manage Registrations”** as shown above

c. You will now see a list of the people who are registered.

Care of the Ventilated Patient
 Course Name: Care of the Ventilated Patient
 Course Version: 1

Class Session Range: 12/27/2019 12:00 PM - 12/27/2019 4:00 PM ET 1 session

Registered Students:

Name	User ID	Department	Status	<input type="checkbox"/> Drop
		4008110 - Nursing Float Pool	Active	<input type="checkbox"/>
		4006200 - ICU	Active	<input type="checkbox"/>
		4008111 - Critical Care Float Pool	Active	<input type="checkbox"/>
		4008111 - Critical Care Float Pool	Active	<input type="checkbox"/>
		1006102 - 4 South Oncology Unit	Active	<input type="checkbox"/>
		4008110 - Nursing Float Pool	Active	<input type="checkbox"/>
		4008111 - Critical Care Float Pool	Active	<input type="checkbox"/>
		4006200 - ICU	Active	<input type="checkbox"/>
		4006200 - ICU	Active	<input type="checkbox"/>
		2006200 - ICU	Active	<input type="checkbox"/>
		7018307 - Agency	Active	<input type="checkbox"/>
		3007450 - Emergency Department	Active	<input type="checkbox"/>

***Please be careful. Your access level allows you to have access to dropping a person from the class. **DO NOT drop a person (you will need explicit approval to do this).**

3-2 **The Second Way:** to run report by class name **enter class name and click on search**

Class Scheduling
 Search for Classes

Classroom Information

Class Name:

Course Identifier:

Course Name:

Class Affiliation: Catholic Health System - Org Level Select All

[Search Affiliations](#) Include Subsidiary Affiliations

Session Date Range: From: Through:

Instructor First Name:

Instructor Last Name:

Building Name:

Class Type: Classroom

Grading Status (Search Visibility): Grading Not Complete (Visible) Grading Complete

Additional Options: Show Only Active Course Versions

If the Class Affiliation box is checked: uncheck it.

4b. Of all the classes being offered, **FIND** the date in which you are interested in and click **"Manage Registrations"**

Results per page: 25 7 Record(s)

<p>Care of the Ventilated Patient</p> <p>From: 12/27/2019 12:00 PM To: 12/27/2019 4:00 PM ET 1 session</p> <p>Course Name - ID: Care of the Ventilated Patient (ver. 1)</p> <p>Current Registration/Class Size: 12/20</p> <p>Building (Room): C H A R T C (CHARTC 1G)</p> <p>Instructors: Mx. TBD</p> <p>Owner: Catholic Health System - Org Level</p> <p>Created by: Carol Webster on Nov 24, 2019 8:03AM ET</p> <p>Updated by: Carol Webster on Nov 24, 2019 8:03AM ET</p>	<p>Register Manage Registrations Grade Copy</p>
<p>Care of the Ventilated Patient</p> <p>From: 2/26/2020 12:00 PM To: 2/26/2020 4:00 PM ET 1 session</p> <p>Course Name - ID: Care of the Ventilated Patient (ver. 1)</p> <p>Current Registration/Class Size: 1/20</p> <p>Building (Room): C H A R T C (CHARTC 1G)</p> <p>Instructors: Amy C Peterson</p> <p>Owner: Catholic Health System - Org Level</p> <p>Created by: Carol Webster on Dec 5, 2019 9:54AM ET</p> <p>Updated by: Carol Webster on Dec 5, 2019 9:54AM ET</p>	<p>Register Manage Registrations Grade Copy</p>
<p>Care of the Ventilated Patient</p> <p>From: 5/20/2020 12:00 PM To: 5/20/2020 4:00 PM ET 1 session</p>	<p>Register Manage Registrations Grade Copy</p>

You will get the same information as by going in by date of class.

Note: If you want to assess if you will need to request to have another class session added (due to class enrollment), you may want to search by class as you will see the # registered for multiple sessions by easily toggling into different class sessions.



Unassigning Education

**To unassign education you need to have Admin rights

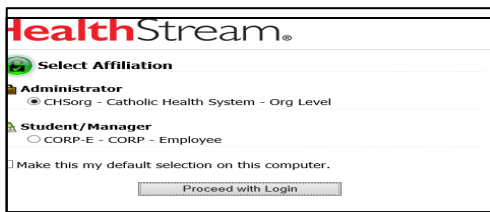
Click to go directly to a page.

Contents

- [Adminisrator Login](#)..... 19
- [Using the People Tab](#) 19
- [Searching for a Student](#)..... 20
- [Student Management Tabs: Assignments, My Learning, My Transcript](#)..... 20
 - [Assignments](#) 20
 - [My Learning](#) 21
 - [My Transcript](#) 21
- [Removing Education](#) 22
 - [\(1\) Grant an Exemption](#)..... 22
 - [\(2\) End an Assignment](#) 23
 - [End Date](#)..... 24
 - [Unenroll](#) 25

Administrator Login

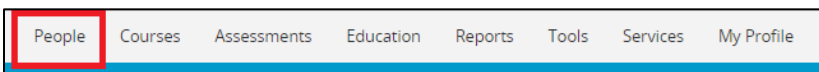
Login to HealthStream > Select Administrator.



You can unassign education in two different ways. You can search for the assignment under the Education tab or search for a person that was assigned the education under the People tab. Using the Education tab is much faster if you need to remove an assignment for a whole group of people and you know the assignment name. The People tab is used if you need to remove an assignment for an individual or do not know the assignment name.

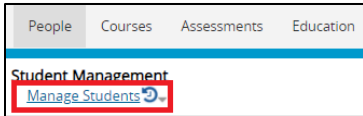
Using the People Tab

Select the People Tab.



Searching for a Student

Select Manage Students (under the Student Management Tab)



Enter the search criteria in the Last name field. Alternatively, if you know their User ID, you can type in their AD (Active Directory) account in the User ID(s) field. You can enter multiple User ID(s) underneath each other if you want to search for multiple people.

NOTE: If you leave all search fields blank, you will be provided everyone that you have admin permission to view. If you need to view a Termed employee, select the Status > Inactive or All.

Click Search.

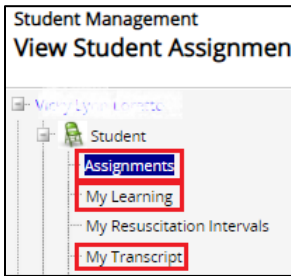


A list of students meeting the search criteria will be displayed. Click on the desired student to view.



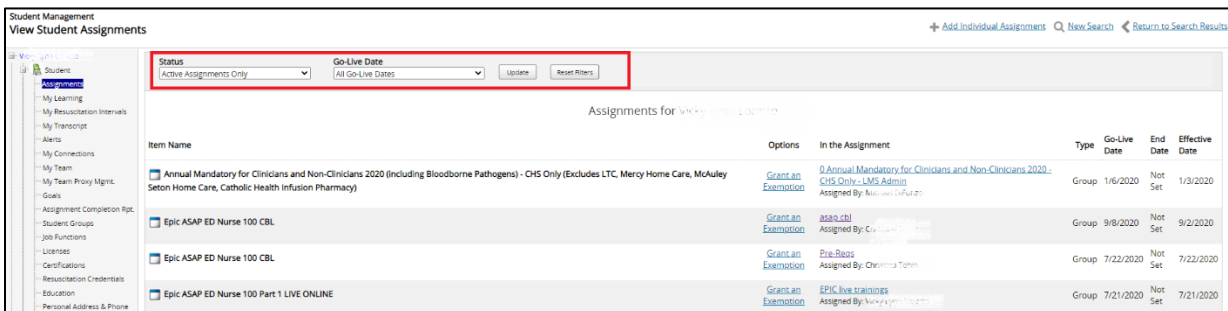
Name	Status	User ID	Job Category	Affiliation	Last Login Date
Laura J. Johnson	Active	ljohnso	Uncategorized	LTC - LTC - Employee (2017711 - District)	9/8/2020 11:05:00 AM
Kevin J. Scott, MD	Active	kscott	Uncategorized	MIB-C-10112-552644-114200144 - Patient & Guest Relations	10/8/2020 11:27:00 AM

Student Management Tabs: Assignments, My Learning, My Transcript



Assignments

Displays education that has been assigned to the student. Assignments will display here even after the student has completed the education. Note: you can filter the assignments by changing the Status and Go-Live Date.



Item Name	Options	In the Assignment	Type	Go-Live Date	End Date	Effective Date
Annual Mandatory for Clinicians and Non-Clinicians 2020 (including Bloodborne Pathogens) - CHS Only (Excludes LTC, Mercy Home Care, McAuley Seton Home Care, Catholic Health Infusion Pharmacy)	Grant an Exemption	0 Annual Mandatory for Clinicians and Non-Clinicians 2020 - CHS Only - LMS Admin Assigned By: Nancy G. Furlan	Group	1/6/2020	Not Set	1/3/2020
Epic ASAP ED Nurse 100 CBL	Grant an Exemption	asao.cbl Assigned By: Christine Tomlin	Group	9/8/2020	Not Set	9/2/2020
Epic ASAP ED Nurse 100 CBL	Grant an Exemption	Pre-Boos Assigned By: Christine Tomlin	Group	7/22/2020	Not Set	7/22/2020
Epic ASAP ED Nurse 100 Part 1 LIVE ONLINE	Grant an Exemption	EPIC live trainings Assigned By: Nancy G. Furlan	Group	7/21/2020	Not Set	7/21/2020

My Learning

Displays Assigned Learning, Elective Learning, Upcoming Classes (enrolled Live Class Sessions), Choose a Class (still needs to enroll into a Live Class Session), and Upcoming Assignments. This is what appears on a student's To Do tab.

Note: Once education has been successfully completed the course will drop from My Learning and move to My Transcript. Education may still appear on My Learning even if it appears on My Transcript IF the student was assigned multiple times in Assignments and the Effective Date setting was not properly used.

Assigned Learning

Name	Due Date	Status	Last Accessed
Epic ASAP ID Nurse 100 CE	9/8/2020	Not Yet Started	09/14/2020
Epic ASAP ID Nurse 101 CE	9/8/2020	In Progress	09/24/2020
Epic ClinDoc Nurse Manager Part 2 LIVE ONLINE	10/31/2020	Not Yet Started	08/12/2020
LGBTQ Cultural Competency Associate Training 2020	11/20/2020	Assigned	
Re-Opening Following Pandemic Closures Training 2020 - All CHS/Trinity/Sterling	11/30/2020	Assigned	

Elective Learning

Institution-Specific Assigned Learning

Name	Institution	Due Date	Status

Upcoming Classes

Start Date & Time	Class Name	Session	Status	Options

NOTE: If you drop a class, you will remain enrolled in the course (unless you also un-enroll from the course).

Choose a Class

Course Name & Learning Activity

Upcoming Assignments

Name	Due Date	Status	Available Date

Legend: Course

My Transcript

All successfully completed courses will appear in My Transcripts. You can modify the Date Range criteria to narrow your display and even search for a specific course. You can use the Customize & Print option to Print or Export (as PDF, CSV, or Excel) the educational history. Note: Successfully completed courses appearing on My Transcript remain on Assignments tab but drop from My Learning (except in cases of duplicate assignments).

Completions: Nov. 6, 2019 - Nov. 5, 2020

[Customize & Print](#)

Date Range: Last 12 Months From Through Update

Search: Records Entered by Student Show Records

Total for Wally, Lynn L... - Completions: 33 Est. Learning Time: 45h 31m

CE CREDIT SUMMARY

Name	CE	Est. Time*	Score	Completion Date
Epic ClinDoc Nurse Manager Part 2 LIVE ONLINE EUPA and Evaluation	0	1:10	90	10/8/2020
Epic ClinDoc Nurse Manager Part 1 LIVE ONLINE	0	4:00	0	10/8/2020
Epic ClinDoc Med/Surg Nurse 101 Part 2 LIVE ONLINE EUPA and Evaluation	0	1:10	87	10/7/2020
Epic COG Reporting In Epic Exercise Lab LIVE ONLINE EUPA and Evaluation	0	0:10	0	10/7/2020
Epic COG Reporting In Epic Exercise Lab LIVE ONLINE	0	4:00	0	10/7/2020

Remove Education

WARNING: Unassigning education may have negative unintended consequences. Use with caution. You can only unassign education if you are the assignment creator or you have been granted upper level admin right access to edit all assignments.

Verify that you really want to unassign the education. Was the student mistakenly assigned education that they didn't need or were they assigned education multiple times?

If they were required to complete a course, you may need to verify that they have successfully completed at least one instance of the education under My Transcript prior to unassigning education.

Name	CE	Est. Time ^h	Score	Completion Date
Epic ASAP ED Nurse 100 ONLINE	0	300	0	9/24/2020
Epic ASAP ED Nurse 101 LIVE ONLINE EBP and Evaluation	0	110	97	9/24/2020
Epic ASAP ED Nurse 100 Part 2 LIVE ONLINE EBP and Evaluation	0	610	0	9/24/2020
Epic ASAP ED Nurse 102 Part 1 LIVE ONLINE	0	200	0	9/23/2020
Epic ASAP ED Nurse 100 Part 1 LIVE ONLINE EBP and Evaluation	0	610	0	9/23/2020
Epic ASAP ED Nurse 102 Part 1 LIVE ONLINE	0	200	0	9/22/2020
Epic ASAP ED Nurse 101 CBL	0	604	0	9/23/2020
Epic ASAP ED Nurse 100 CBL	0	136	0	8/14/2020

Click on My Learning to verify that the course that you would like to remove is displayed under Assigned Learning. This signifies that the course still needs to be completed on the Student's To Do tab. Take note of the course name listed under Assigned Learning that you would like to remove.

Note: You or the student can directly unenroll any courses listed under Elective Learning without removing the assignment.

Name	Due Date	Status	Last Accessed
Epic ASAP ED Nurse 100 CBL	9/8/2020	Not Yet Started	09/14/2020
Epic ASAP ED Nurse 101 CBL	9/8/2020	In Progress	09/24/2020
Epic ClinDoc Nurse Manager Part 2 LIVE ONLINE	10/31/2020	Not Yet Started	08/12/2020
LGBTQ Cultural Competency Associate Training 2020	11/30/2020	Assigned	
Re-Opening Following Pandemic Closures Training 2020 - All CHS Trinity Sterling	11/30/2020	Assigned	

Click Assignments tab and locate the course name under Item Name that was listed under the My Learning tab that you would like to remove. The course might be listed in more than one assignment. Make sure you select the correct one.

You have two options:

(1) Grant an Exemption

You can Grant an Exemption for the assignment. This will cease any overdue alerts but note that they will show up as non-compliant on any non-completion reports. This may be appropriate in cases where you want to remove this assignment for this individual student only.

Locate the correct course (listed under Item Name) and assignment (listed under In the Assignment) that you want to remove. Under Options column, click Grant an Exemption.

Student Management
View Student Assignments

Status:
 Go-Live Date:

Assignments for Vicky Lynn Loretto

Item Name	Options	In the Assignment	Type	Go-Live Date	End Date	Effective Date
Annual Mandatory for Clinicians and Non-Clinicians 2020 (including Bloodborne Pathogens) - CHS Only (Excludes LTC, Mercy Home Care, McAuley Seton Home Care, Catholic Health Infusion Pharmacy)	Grant an Exemption	0 Annual Mandatory for Clinicians and Non-Clinicians 2020 - CHS Only - LMS Admin Assigned By: Michael DiFonzo	Group	1/6/2020	Not Set	1/3/2020
Epic ASAP ED Nurse 100 CBL	Grant an Exemption	asap.cbl Assigned By: Christina Tobin Last exempted on 9/8/2020: was assigned in list twice	Group	9/8/2020	Not Set	9/2/2020
Epic ASAP ED Nurse 100 CBL	Grant an Exemption	Pre-Reqs Assigned By: Christina Tobin	Group	7/22/2020	Not Set	7/22/2020
Epic ASAP ED Nurse 100 Part 1 LIVE ONLINE	Grant an Exemption	EPIC live trainings Assigned By: Vicky Lynn Loretto	Group	7/21/2020	Not Set	7/21/2020
Epic ASAP ED Nurse 100 Part 1 LIVE ONLINE EUPA and Evaluation	Grant an Exemption	0922 ASAP ED Nurse 100 Part 1 Evaluation at 8am Assigned By: Joanna M Trzepacz	Group	9/22/2020	Not Set	9/22/2020
Epic ASAP ED Nurse 100 Part 2 LIVE ONLINE	Grant an Exemption	EPIC live trainings Assigned By: Vicky Lynn Loretto	Group	7/21/2020	Not Set	7/21/2020
Epic ASAP ED Nurse 100 Part 2 LIVE ONLINE EUPA and Evaluation	Grant an Exemption	Epic 0923 ASAP ED Nurse 100 Part 2 Evaluation @12pm Assigned By: Sarah E Chnum	Group	9/23/2020	Not Set	9/23/2020
Epic ASAP ED Nurse 101 CBL	Grant an Exemption	asap.cbl Assigned By: Christina Tobin Last exempted on 9/8/2020: was assigned in list twice	Group	9/8/2020	Not Set	9/2/2020
Epic ASAP ED Nurse 101 CBL	Grant an Exemption	ED_asap Assigned By: Christina Tobin	Group	8/21/2020	Not Set	8/21/2020

Select the option to Exempt, enter a comment, and click Save. The course will now drop from their My Learning (To Do tab). If the option to Exempt is grayed out, check the Status. They may have already completed the course and you can't Exempt them.

Student Management
Edit Student Assignment Exemptions

Assignment Instances of Epic ASAP ED Nurse 101 CBL

Assignment Name: asap.cbl
Assigned By: Christina Tobin

Select All

Instance Exempt?	Start Date	Instance Due Date	Status	Date	Exempt By
<input checked="" type="checkbox"/>	9/2/2020	9/8/2020	Exempt	9/8/2020	Linda K Pridger

Exemption Comment: was assigned in list twice

(2) End an Assignment

You can end the assignment. This is a good option if you want to remove the assignment from a whole student group of people. Click on the appropriate assignment name that contains the course that you would like removed.

Student Management
View Student Assignments

Status:
 Go-Live Date:

Assignments for Vicky Lynn Loretto

Item Name	Options	In the Assignment	Type	Go-Live Date	End Date	Effective Date
Annual Mandatory for Clinicians and Non-Clinicians 2020 (including Bloodborne Pathogens) - CHS Only (Excludes LTC, Mercy Home Care, McAuley Seton Home Care, Catholic Health Infusion Pharmacy)	Grant an Exemption	0 Annual Mandatory for Clinicians and Non-Clinicians 2020 - CHS Only - LMS Admin Assigned By: Michael DiFonzo	Group	1/6/2020	Not Set	1/3/2020
Epic ASAP ED Nurse 100 CBL	Grant an Exemption	asap.cbl Assigned By: Christina Tobin Last exempted on 9/8/2020: was assigned in list twice	Group	9/8/2020	Not Set	9/2/2020
Epic ASAP ED Nurse 100 CBL	Grant an Exemption	Pre-Reqs Assigned By: Christina Tobin	Group	7/22/2020	Not Set	7/22/2020
Epic ASAP ED Nurse 100 Part 1 LIVE ONLINE	Grant an Exemption	EPIC live trainings Assigned By: Vicky Lynn Loretto	Group	7/21/2020	Not Set	7/21/2020
Epic ASAP ED Nurse 100 Part 1 LIVE ONLINE EUPA and Evaluation	Grant an Exemption	0922 ASAP ED Nurse 100 Part 1 Evaluation at 8am Assigned By: Joanna M Trzepacz	Group	9/22/2020	Not Set	9/22/2020
Epic ASAP ED Nurse 100 Part 2 LIVE ONLINE	Grant an Exemption	EPIC live trainings Assigned By: Vicky Lynn Loretto	Group	7/21/2020	Not Set	7/21/2020
Epic ASAP ED Nurse 100 Part 2 LIVE ONLINE EUPA and Evaluation	Grant an Exemption	Epic 0923 ASAP ED Nurse 100 Part 2 Evaluation @12pm Assigned By: Sarah E Chnum	Group	9/23/2020	Not Set	9/23/2020
Epic ASAP ED Nurse 101 CBL	Grant an Exemption	asap.cbl Assigned By: Christina Tobin Last exempted on 9/8/2020: was assigned in list twice	Group	9/8/2020	Not Set	9/2/2020
Epic ASAP ED Nurse 101 CBL	Grant an Exemption	ED_asap Assigned By: Christina Tobin	Group	8/21/2020	Not Set	8/21/2020

You will receive a caution warning popup. Click Continue to the Group Assignment.

CAUTION

Avoid Deleting a Group Assignment
It's made to several people, not just this student.

Deleting a group assignment removes it from all assigned students and negatively affects reports.

To remove this assignment for this student only:

- Return and use the Grant an Exemption option, or
- Continue and use the Grant Assignment Exemptions.

For Assessments: Don't delete the assignment. Directions available in online Help.

Return to Student AssignmentsContinue to the Group Assignment

Review the list of courses under the Learning Items. These will be **ALL** of the courses that will be removed.

Review the list under the Target Audience. These will be **ALL** of the people that the courses will be removed from. Click on each Target Audience to view the people in each group.

Optional: Click on Assignment-Wide Exemptions to view a list of people exempted from the assignment. Click Exemptions next to each Learning Item course to view a list of people exempted from each individual course.

The screenshot shows the 'Edit Group Assignment' page. At the top, there are navigation links for 'Assignment-Wide Exemptions' and 'Return to Student'. The 'Learning Items' section has a search bar and a list of items. The first item, 'Fall ASAP ED Nurse 101 CBL', is selected with a blue checkmark and a red box. To its right is a link for 'Exemptions' with a red arrow pointing to it. Below this is the 'Target Audience' section, which also has a search bar and a list of groups. Two groups, 'L101' and 'Patient Evaluation Group', are selected with blue checkmarks and red boxes.

Optional: Click Add Students to Exempt if you would like to add more students to exempt from an assignment/course. This may be a better option than ending the assignment for everyone.

The screenshot shows the 'Search Assignment Exemptions' page. At the top right, there is a red box around the 'Add Exemptions' button. Below this are search filters for 'Assignment Name' (ED asap) and 'Created By'. There is a table with columns for 'Exempt?', 'Name', 'Item', 'Exempted By', and 'Exemption Comment'. Below the table, there is a 'Results per page' dropdown set to 25 and a 'Cancel' button.

End Date

Scroll down to **End Date Optional**. Enter today's date.

This will prevent satisfaction of this assignment after this date. If the student has never clicked on the course, it will be removed from their My Learning (To Do) tab. If the student clicked on the course and is In Progress Status, it will move from Assigned to their Elective Learning.

Click Save.

Dates and Settings

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 Optional!
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

Grace Period
When available, allows completion of assignments beyond due date.
Fast Due students who do so appear as Completed late on reports.
Indefinite unless the End Date is set.

Go to My Learning tab and verify the course(s) are no longer under Assigned Learning. They may have moved to Elective Learning. Elective Learning do not generate overdue alerts. Students can unenroll themselves from Elective Learning.

Unenroll

Best practice is to unenroll the student from the course(s) that you have ended. Click My Learning tab. Click the desired course to remove under Elective Learning.

Student Management
View Student Learning

Assigned Learning

Name	Due Date	Status	Last Accessed
Epic ClinDoc Nurse Manager Part 2 LIVE ONLINE	10/31/2020	Not Yet Started	08/12/2020
LGBTQ Cultural Competency Associate Training 2020	11/30/2020	Assigned	
Re-Opening Following Pandemic Closures Training 2020 - All CHS Trinity Sterling	11/30/2020	Assigned	

Elective Learning

Name	Enrolled By	Status	Last Accessed
Epic ASAP ED Nurse 100 CBL	Self	Not Yet Started	09/14/2020
Epic ASAP ED Nurse 101 CBL	Self	In Progress	09/24/2020

Institution-Specific Assigned Learning

Name	Institution	Due Date	Status
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Click Un-enroll. The course is now removed from their My Learning (To Do) tab. Students can also un-enroll themselves from Elective Learning. Verify the course has been removed from their My Learning tab.

Course Details
Epic ASAP ED Nurse 100 CBL
Estimated Course Length: 96 minutes

[Share This Course](#) [Course Overview](#) [Un-enroll](#) [Exit Course](#)

Course Learning Activities
You are enrolled in this course. Click the "Course Overview" link above to review the course description, learning objectives, and all available CE credit prior to beginning the learning activities below. (For CE Credit Information, scroll down.)

Learning Activity	Status	Score	Last Accessed
ED001 Overview of Hyperspace for ASAP Users	Not Yet Started		
ED002 Overview of the ED Map	Not Yet Started		
ED005 Introduction to the ED Narrator	Not Yet Started		
ED006 Patient Tracking	Not Yet Started		
ED007 Overview of History, Home Medications, and	Not Yet Started		
ED008 Overview of Shift Change	Not Yet Started		

Reports: Running Course Completions and Reoccurring Reports

****Need Admin rights to run these reports**

This report is to obtain course completion results on people who have taken courses in HealthStream (HS). These directions are for people who do NOT have access to MyTeam dashboard and will be running this report directly through their Administrator log in.

You may run this as a 1 time report - *OR* – you may schedule reports to occur at specific times.

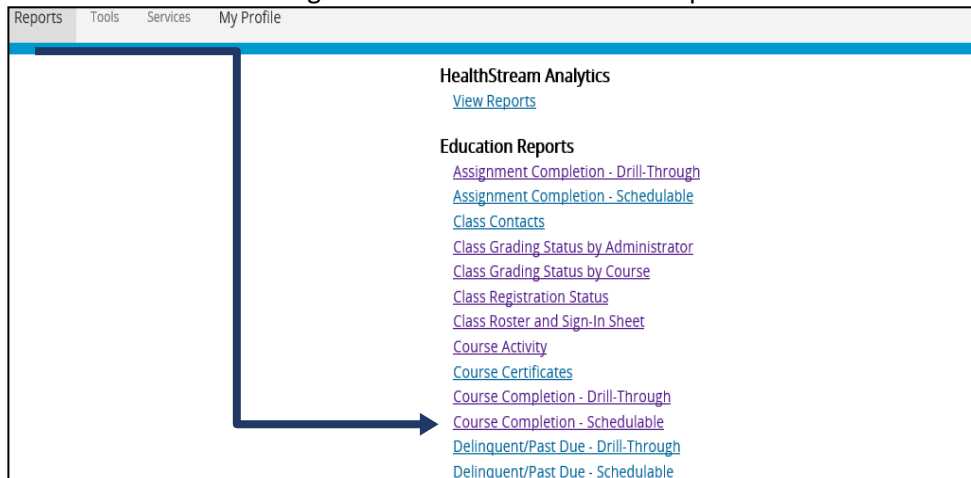
Important Notes: The data from this report will:

- NOT include completions that have been done **today**. If you need to know if someone has completed a Learning Activity, as of today, you can check an individual's transcript
- Course Completion – Schedulable Reports will display students that have been Exempted as having NOT completed the course. You may want to run the Assignment Completion – Schedulable Report which allows the filtering by Completion Status.
- Include completions **ONLY** done in HS, therefore, if you want a listing of all course completions that include both NetLearning and HS you will need to run transcripts on an individual (student) or a Student Group Transcript

****You must log in as Administrator**

Part A: Running a Course Completion Report

1. Select Reports Tab
2. Select Course Completion – Schedulable (screen below will appear) *Please note your screen may have different listings underneath the Education Reports than the one shown below.



Once you select **Course Completion – Schedulable** the screen below will show up:

Reports
Course Completion - Schedulable ← Exit Report

Sort By:
 Students to Include: All Selected Students Students with completions only Incomplete: Students only
 Learning to Include: All Learning Assigned Learning only Elective and Enrolled Learning only
 Completion Date Range: Current Year
 OR: From: Through:

Learning: * Report on All Learning
[Select an Assignment](#) [Search for Courses, Curricula, or Equivalent](#)
 Select All

Students: * Report on All Active Students
[Select a Student Group](#) [Search for Students](#)
 Select All

On this page you will tailor this report using the following data if applicable:

- a. Sort By: default is on “Department, Student, Learning”
- b. Students to Include: default is “All Selected Students” (this displays BOTH Completions and Incompletions)
- c. You can change to one of the other options to filter the report to either Completions or Incompletes only
- d. Learning to Include: default is “All Learning”
- e. Completion Date Range: select from the drop down, customize the date or keep as the default “Current Year”
- f. Under Learning- you will want to **Select an Assignment or Search for Courses, Curricula, or Equivalent** (browse for a course). **When searching for courses this will include Curricula or Equivalent, both live classes, and CBLs.** Once you search for the course a few options that meet your criteria will appear; check off the one you are looking for then press the **“Select”** button

Course Completion - Schedulable Report
Browse for a Course

Results per page:

Name

<input type="checkbox"/>	Advanced Cardiac Life Support (ACLS)
<input type="checkbox"/>	Annual Cardiac Rhythm Interpretation Exam
<input checked="" type="checkbox"/>	Basic Life Support (BLS)
<input type="checkbox"/>	Capnography in the Management of the Critically Ill Patient (AARC/CSRT) - 20-580346
<input type="checkbox"/>	Capnography in the Management of the Critically Ill Patient ANCC - 20-467777
<input type="checkbox"/>	Capnography: A Standard of Care for Procedural Sedation Monitoring (AARC/CSRT) - 20-580344
<input type="checkbox"/>	Capnography: A Standard of Care for Procedural Sedation Monitoring ANCC - 20-395967

Once you clicked on the “Select” button and the report has been run the Course Completion – Schedulable window will come up and the name of the class will appear in the Learning box

People Courses Education Reports Tools Services My Profile

Reports
Course Completion - Schedulable [Schedule this report](#) [Exit Report](#)

Sort By: Department Student Learning

Students to Include: All Selected Students Students with completions only Incomplete Students only

Learning to Include: All Learning Assigned Learning only Elective and Enrolled Learning only

Completion Date Range: Current Year From: [] Through: []

OR: From: [] Through: []

Learning Cardiac rhythm Report on All Learning [Select an Assignment](#) [Search for Courses](#) [Select All](#)

Students Report on All Active Students [Select a Student Group](#) [Search for Students](#) [Select All](#)

- Next you will want to ensure the Students box is completed. You can either Search for Students, Select a Student Group, or report on all active students
- Display Options: Include Student User ID - include student USER ID in this report whenever possible
- Format Options on this page will give you the option of “Include Page Breaks” or “Do Not Include Page Breaks.” Page breaks will allow for you to print/export by department if wanted. **Do Not** Include Page Breaks if you want a smaller size (number of pages) in your report
- Then click the “Continue” button and Completion Report – Schedulable will then open in a new tab. You can then export it as PDF or into an Excel document where you can format/sort it to fit your needs.

REPORT REPORT GENERATED: Jan 14, 2020, 2:06 pm ET

View Report Settings

SCH - Employee

Course Completion Report - Schedulable

Completion Date Range: Jan 1, 2020 through Dec 31, 2020

Data as of: Jan 14, 2020, 1:00 am ET

Report Generated: Jan 14, 2020, 2:06 pm ET

DEPARTMENT: 1006100-3 WEST PROG INTERMED CARE

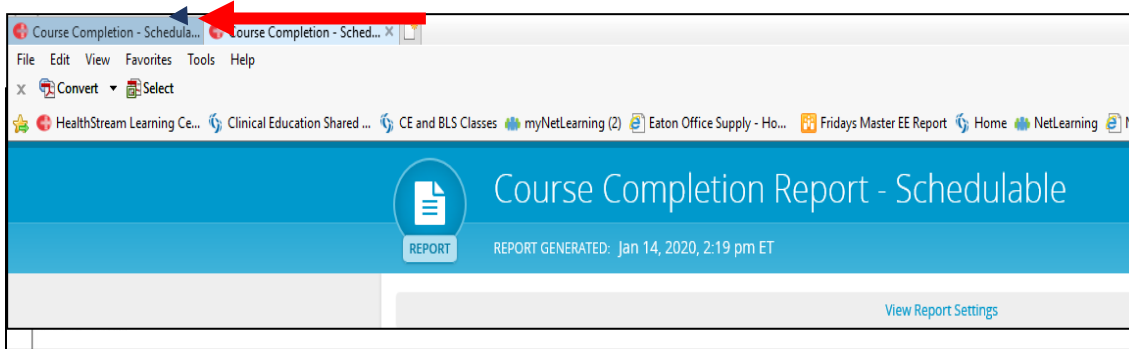
DEPARTMENT	STUDENT	LEARNING NAME	COMPLETION DATE	COMPLETED AT
------------	---------	---------------	-----------------	--------------

Print Export PDF CSV EXCEL

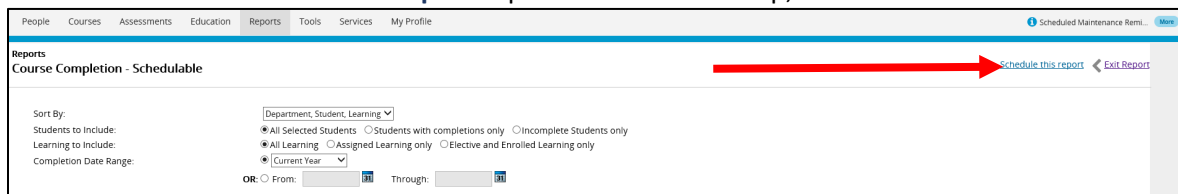
Scheduling a Report

Part B: Recurring Reports/Scheduling an Automatic and or Recurring Run of a Report

1. After you have run the report go back to the previous tab



2. The "Schedule this report" option will now come up;



3. this will show the parameters on how you would run your report

Scheduling
Course Completion - Schedulable - Created Jan. 14 2020 02:21:57 PM

Request Name: a

Email Address: b

Report Format: c

Choose whether to run this scheduled task daily, weekly, monthly or quarterly.

Daily

Weekly d

Sun Mon Tue Wed Thu Fri Sat

Monthly

1st day of month

Last day of month

Specific day of month

Quarterly

1st day of quarter

Last day of quarter

Specific day of quarter

Note: quarters are defined as calendar quarters.

Schedule Start Date: e

Schedule End Date:

Note: Scheduled tasks are processed nightly between Midnight and 8 AM ET.

- Request Name-here you can change the name of this report to whatever best describes your report
- Email Address-you can add multiple people here to receive this report if needed
- Report Format-HTML, Excel, PDF, etc.
- Select Frequency of this report
- Schedule Start Date and End Date (ensure you are in the correct year)

4. You can manage/edit/delete your report at any time by doing the following:
 - a. Go to your Reports tab
 - b. Then Request Manager
 - c. Then Manage Requests

Note:

Verify the Completion Date Range of the Report that you ran.

Sort By: Department, Student, Learning ▼

Students to Include: All Selected Students Students with completions only Incomplete Students only

Learning to Include: All Learning Assigned Learning only Elective and Enrolled Learning only

Completion Date Range: → Current Year ▼

OR: From: Through:

If you have selected a static date range, (1/1/2020 – 1/31/20), you will always receive the Scheduled Report containing data from that date range. If you select a dynamic date range, (Current Year), you will receive a report containing current data.

Scheduled tasks are processed nightly between Midnight and 8:00am ET. The actual Report may not be received until later in the day. Please keep that in mind when you are setting your parameters of when you want to receive your report. Note: Reports will not contain today’s completions.

Education Reports Resource:

The following reports are available from the Education Reports section of the Reports tab. These reports generally support features and information relative to the Education tab:

https://www.healthstream.com/hlchelp/AdministratorDefault/AdminTopics/Reports/Education_Reports_Concept/Education_Reports_Concept.htm

Reports: Running Student Transcripts

Important Note: these transcripts include everything from 2015 onward. For transcript information that is needed prior to 2015, please contact Clinical Education for directions on how to obtain that information.

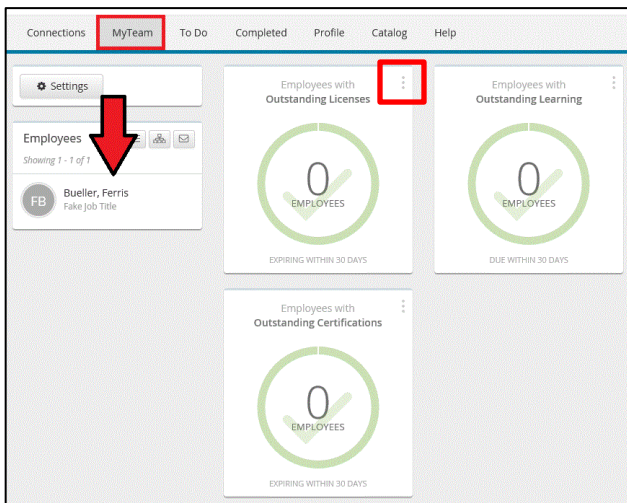
MyTeam Dashboard

The fastest way to run a transcript on a direct supervisee is to use the MyTeam dashboard. MyTeam displays all direct supervisees of record as recorded in the HRIS system (Lawson). The Supervisor record is imported and **cannot** be changed in HealthStream. If you do not have direct reports, you will not have the MyTeam dashboard.

Login as a Student/Manager (NOT Administrator).

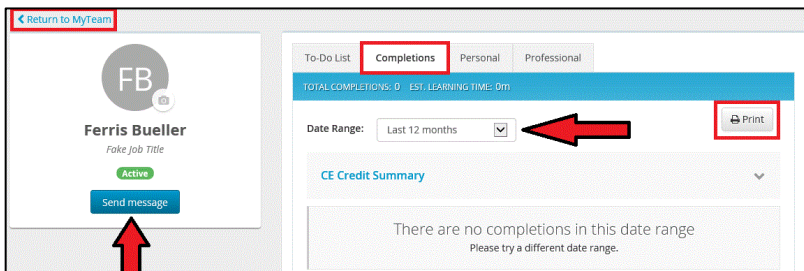


Click MyTeam tab.
Click the desired associate tile listed under Employees.



Click Completions tab > select desired Date Range. You can now view their transcript.
If desired, click Print. You will have the option to Print or Export (PDF, CSV, Excel) the data.

The Widgets is a central location to view items that are expiring or overdue. Click the three vertical dots to change the Expiring within dates. You can also Send message directly to their CHS email address. Click Return to MyTeam to view the dashboard.

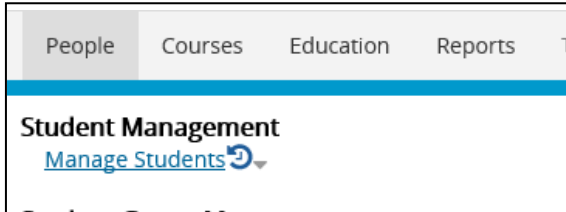


Administrator Reports: Running Individual Transcripts From People Tab

This report provides directions on how to run associate/student transcripts in HealthStream (HS) when you don't have access to the "MyTeam" tab.

Login to HealthStream (HS) Select-Administrator

- 1- Select the **People** Tab
- 2- Select **Manage Students** (under the Student Management Tab)



The Student Management/Manage Students screen will appear

You can now search 1 of 2 ways:

Search 1-In the **Last:** box you can leave the box empty and just click Enter on your keyboard. You can also just click Search. This will provide you a list of all the associates/students you have the rights to view from your login.

Search 2- In the **Last:** box you enter the last name of the associate/student you are searching for.



Student Management
Manage Students

Advanced Search Return to People

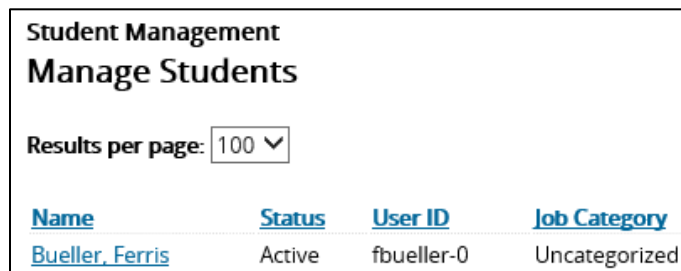
Last: bueller First: Middle:

User ID(s):

Status:
 Active Inactive On Leave All

Search Cancel

At this time a listing of individuals with the last name you entered appear. Select the correct individual.



Name	Status	User ID	Job Category
Bueller, Ferris	Active	fbueller-0	Uncategorized

- 1- Once selected the General Information screen appears on the individual and you will select the **"My Transcript"** shown below

Student Management
Completions: Jan. 29, 2019 - Jan. 28, 2020

Customize & Print | New Search | Return to Search Results

Michael DiFonzo

Date Range: Last 12 Months | OR: From: [31] Through: [31] Go | Include Self-Entered Learning Events

TOTALS FOR MICHAEL DIFONZO		CONTINUING EDUCATION EARNED	
COMPLETIONS	ESTIMATED TIME	TYPE	NUMBER EARNED
5	0:40	Admin-Entered	0.00
		Courses	0.00

Name	CE	Est. Time*	Score	Completion Date
<input type="checkbox"/> Annual Mandatory for Clinicians and Non-Clinicians 2020 - CHS Only (Excludes LTC, Mercy Home Care, McAuley Seton Home Care, Catholic Health Infusion Pharmacy)	0	0:40	100	01/06/2020
<input type="checkbox"/> RD SET Disposable Sensor Training Module	0	0:00	100	11/11/2019 ADMINISTRATOR-ENTERED
<input type="checkbox"/> Workplace Violence Reporting in Midas	0	0:00	100	09/18/2019 ADMINISTRATOR-ENTERED
<input type="checkbox"/> LGBTQ Cultural Competency	0	0:00	100	08/19/2019 ADMINISTRATOR-ENTERED

- 2- Then the next page will come up where you can select a Date Range, Include Self-Entered Learning Events, and Customize & Print the transcript.

Student Management
Completions: Jan. 18, 2019 - Jan. 17, 2020

Customize & Print | New Search | Return to Search Results

Admin Admin

Date Range: Last 12 Months | OR: From: [31] Through: [31] Go | Include Self-Entered Learning Events

TOTALS FOR ADMIN ADMIN		CONTINUING EDUCATION EARNED	
COMPLETIONS	ESTIMATED TIME	TYPE	NUMBER EARNED
0	0:00	Admin-Entered	0.00
		Courses	0.00

Name	CE	Est. Time*	Score	Completion Date
There are no completions for the date range specified. (A larger date range may return data.)				

- 3- You can repeat this procedure and obtain multiple transcripts.

NOTE: You can view more information by clicking Assignments (view all assignments) and My Learning (all assigned learning Not Yet Started or still In Progress will appear here – once completed, it will no longer appear here but will be moved to My Transcript).

Student Management
View Student Assignments

Michael DiFonzo

Student

Assignments

My Learning

My Transcript

Alerts

My Connections

Goals

Assignment Completion Rpt.

Student Groups

Job Functions

Licenses

Certifications

Resuscitation Credentials

Education

Personal Address & Phone

Badge

Documents

Awards & Recognition

Other

Work Experience

Volunteer Service

Committee Work

Memberships & Associations

Student Assignments

Status: All Statuses

Item Name

Annual Mandatory for Clinicians and Non-Clinicians 2020 - CHS Only (Excludes LTC, Mercy Home Care, McAuley Seton Home Care, Catholic Health Infusion Pharmacy)

Assignment Name: 0 Annual Mandatory for Clinicians and Non-Clinicians 2020 - CHS Only - LMS Admin, Assigned By: Michael DiFonzo

Effective Date: 01/03/2020, Go-Live Date: 01/06/2020, End Date: Not Set

Administrator Reports: Running Multiple Transcripts From Reports Tab

These directions are for people who do NOT have access to MyTeam dashboard.

Login to HealthStream (HS) Select-Administrator

1- Select **Reports Tab**

2- Then under **People Reports** select **“Student and Group Transcript”**



3- After clicking **“Student and Group Transcript”** you will see the following page:



On this page you will need to:

Identify your parameters by:

- Report View: either option of Completion Date or Completion Name
- Date Range: select your own custom dates, or leave default range of “Last 12 Months”
- “Select a Student Group”** if you have previously created a group or **“Search for Students”** –you can enter as many students as you would like in this search by repeatedly selecting the Search for Students and entering additional names each time

Below shows searching for a student individually.

- 4- Once you select “**Search for Students**” the box below will appear and you will have to fill in the following information:
 - a. Students Last Name* or if you just put the cursor in the “Last” box shown and click Search a **listing of all the students in your area/department will show up**
 - b. Students First Name (if you fill this out it will filter more)
 - c. Middle name not needed
 - d. Then you have the option to check mark the status (typically leave as the default “active”)
 - e. Then you can just click Enter on your keyboard after the last name has been entered or scroll to the bottom of the page and click “**Search**”

The screenshot shows a form titled "Student Selector" with a sub-header "Search Student(s)". There is a search icon and a link "Search Student Groups" in the top right. The form contains several input fields: "Last:" with a red box 'a' over it, "First:" with a red box 'b' over it, and "Middle:" with a red box 'c' over it. Below these is a larger "User ID(s):" field. At the bottom, there is a "Status:" section with radio buttons for "Active" (selected), "Inactive", "On Leave", and "All". A red box 'd' is over the "Active" radio button.

The next page that will come up after your search is the listing of student(s) that fit your search criteria by last name, etc. Select the correct associate/student name then select “**Continue.**”

This will bring you back to your previous view and this time:

- a. **Student Criteria Selected** will be checked off as shown below and you can,
- b. Filter for more data by using the **Show Additional Options**

The screenshot shows a navigation bar with "Reports" selected. The main heading is "Student and Group Transcript". There are options for "Report View:" (Completion Date selected, Completion Name (Alphabetical)), "Date Range:" (Last 12 Months selected), and "Students:" with a red box 'a' over the search field. A checkbox "Student Criteria Selected" is checked. Below that, "Completions To Include:" has "Show Additional Options..." with a red box 'b' over it. A green "Continue" button is at the bottom left. A blue arrow points from the "Continue" button to the expanded options section below.

The expanded options section includes:

- Completions To Include: Student Demographics: All, Assigned only, Elective only, Learning Events only. Sub-options: Include Student User ID, Include Hire/Re-hire Date, Include Job Title, Include Active Date, Include Job Category, Include Review Date, Include Department.
- Transcript Data Options: Include Estimated Time, Include Time with Completion Date, Include Course Score, Include Learning Event Comments, Include Failed Courses.
- Learning Events: Include Administrator-entered, Include Self-entered.
- Sort Students By: Student Name, Department.

Once you have completed this page just click the green “**Continue**” button and your student(s) transcript report sheet will appear. You can now export your report and tailor it to your specific parameters by exporting it as either a PDF, CSV or Excel document.

The screenshot shows the "Student and Group Transcript Report" for "Spence, Janet E". It includes a "Print" button and an "Export" dropdown menu with options for PDF, CSV, and EXCEL. The report content is as follows:

CONTINUING EDUCATION EARNED	
TYPE	NUMBER EARNED
Admin-Entered	0.00
Course	0.00
Self-Entered	0.00