How to assign a course in HealthStream

This guide will walk you through the steps to assign a course/module to an individual in HealthStream LMS. This guide assumes that the individual being assigned has been entered into HealthStream, he/she is entered into the facility/node that the administrator (you) are in, and the course/module in question is available in the node where being assigned.

1). After logging into HealthStream, select the administrator account associated with the node where the individual needing assignment is entered. For this example, University Hospital will be used:



2). Select "Manage Students" - this is the easiest method for assigning to a single individual.

People	Courses	Education	Reports	Tools	Services	My Profile		
People Student M Add a Stu	anagement dent			Education Assignment Management Add a Group Assignment				
Acquire a Student Manage Students					<u>Manage Group Assignments</u> <u>Add an Individual Assignment</u> <u>Add a Certification Based Assignment</u>			
Student G	roup Managen	nent			6 14			
Add a Student Group Manage Student Groups					Add a Class			

3). Enter the individual needing assignment(s) into the search – note: using the J# of an individual is the best search method (eliminating errors with shortened names, spelling errors, etc.).

4). In the "Assignments" tab on the left hand side of the "Student Management" page (here you can see all assignments that are active for the individual), you can select "+ Add Individual Assignment" to select specific content for assignment.

People	Courses	Education	Reports	Tools	Services	My Profile						
Student Ma View Stu	nagement dent Assig	gnments					Add In	dividual Assignment	t Q <u>New</u> :	Search 🔇 Re	turn to	Search Results
■• ■• ■• ■• Stu	ident Profile		Status Active Assig	gnments O	nly 🗸 🛛 A	o-Live Date All Go-Live Dates	~	Exemptions Show All Assigned	ltems	▼ Updat	•	Reset Filters
To-Do List Transcript / Completed Checklist Progress		eted	Active Assignments for									
Alei Ass	ts ignment Comple	etion Rpt.	<u>ltem Na</u>	ime		Options	In the Assignr	nent	Kind	<u>Go-Live</u> Date	<u>End</u> Date	Effective Date
Stu Lice	Student Groups Licenses		2022 Ca Decisior	reSelect C Support	linical Education	<u>Grant an</u> Exemption	2022 CareSele Support Educe	ect Clinical Decision ation	Group	10/24/2022	Not Set	10/24/2022

5). The following screen is for entering the specifics of the assignment(s) being assigned. Note: The "Name the Assignment" line is for entering a title for this assignment or group (as opposed to entering the name of what course/module will be assigned). It is important to list a description briefly detailing reason for assignment and time of assignment.

Name this Assignment *		
Appears in search results and ce	tain reports.	
Assignments needed for d	bing job	
Description		
For understanding of regu	ation and practice for Established by Jan, 2023.	
Learning Items *	Q Search Learning Items	
Students are enrolled into the ac	ive version of a learning item when they select it on their To-Do List.	

Once this information is entered, select "Search Learning Items.." to begin inputting the specific course(se) needed.

6). In the Search Learning Items page, input the name of the course needed (Note: if you are unaware of the title, you may enter the primary subject title and scroll through the results given in order to locate the course needed).

Student Assignment Editor Browse		Keturn to Assignment Editor
Refine Results Description Show Hide	HIPAA Results per page: 25	Q 27 Record(s)
Learning Items Courses Course Bundles Curricula Equivalents	Sort By: Name A to Z ◆ Image: Second Sec	
Expiration Date <u>Clear Dates</u> From Through	Employee Education (NAR) Ver. 2: Regulatory education for USA Health workforce members. Owner: University of South Alabama Health System - Org Level Status: Approved Contains:	
Update	FairWarning System for Managers	

Once you have located the course(s) you wish to add, click on the small square next to the title of the course to select it, then remember to click "Select" at the bottom to finalize the selection.



This will cause the course(s) to show up in the "Learning Items" window – once all the courses needed to be added are selected, you will then scroll down on the Add Student Assignment page to enter the assignment details.

7). Assignment details include whether the assignment is a one-time or reoccurring assignment (for example, annual training would be considered a "recurring assignment"). Generally, if the assignment is meant to be accessed immediately by the participant, you will enter the current date next to "Fixed: Go-live on" date blank (Note: by clicking on the calendar icon next to this, you can enter the date easily by selecting the day).

If you have a specific due date you wish to enter, you can enter that in the first blank of "Due Date." Generally, HealthStream courses/modules are assigned with a 30-day due date – this can be set by selecting the following option that is already entered to be "Due 30 days after Hire/Active Date."

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 🗄 😫 🛕
O Flexible: Go-live 0 days after this individual's Hire/Active Date ✓ beginning
Due Date *
For recurring assignments, this is the initial due date.
Due on H
O Due 30 days after V Hire/Active Date V
End Date Optional
Prevent satisfaction of this assignment after this date.
End on
Expand the Assignment Window

It is recommended to leave the remaining options set as default (with no end date or grace period and automatically reassign the course. Other settings would be in special circumstances.

8). Upon hitting the "Save" button at the bottom of this screen, the assignment will be completed and will appear in the "Assignments" tab of the individual's profile.

To check accessibility to the individual, you can click on "To-Do List" while still in the individual's Student Management Page. You should see the newly assigned course to the right of the navigation tabs (Note: it often takes a small processing time before courses populate the To-Do list – if the newly assigned course(s) does not show up, wait a few minutes and refresh the page to check again).



Once a course appears in an individual's To-Do list, it is accessible by the student for completion.