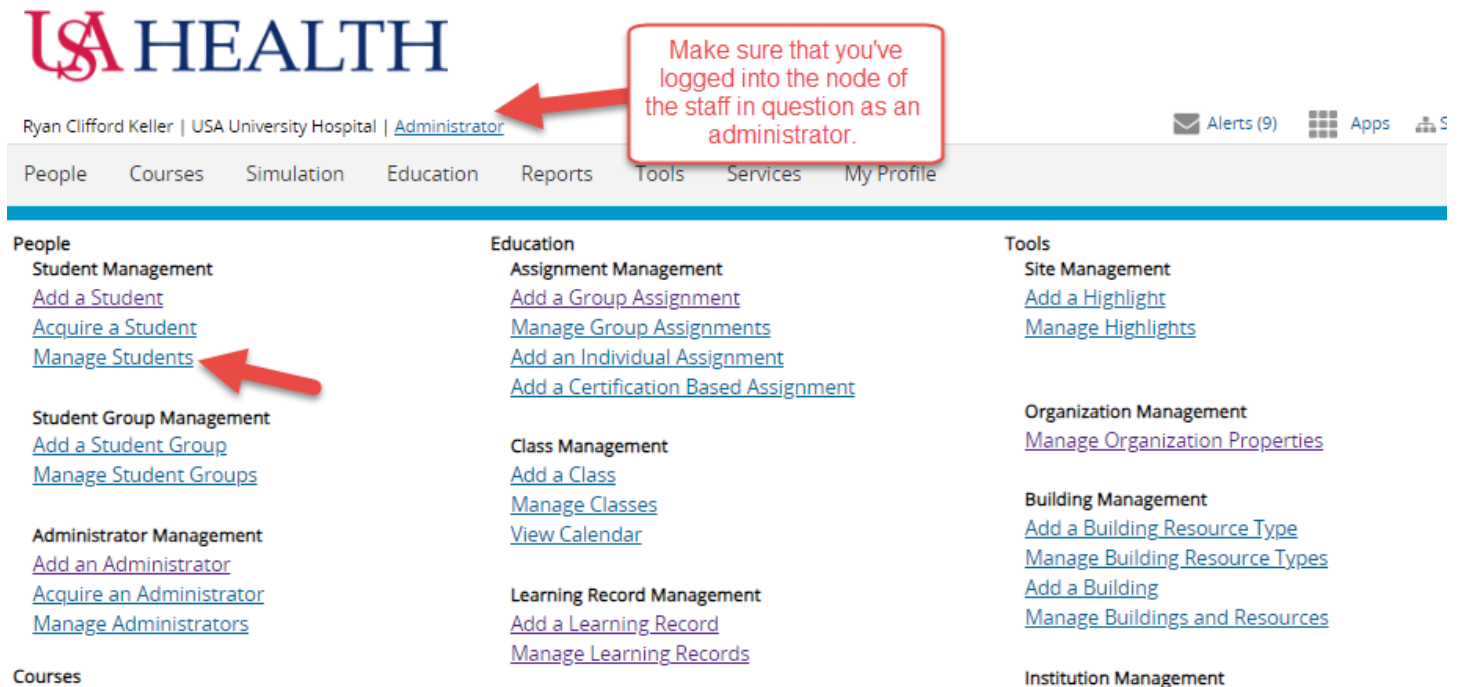
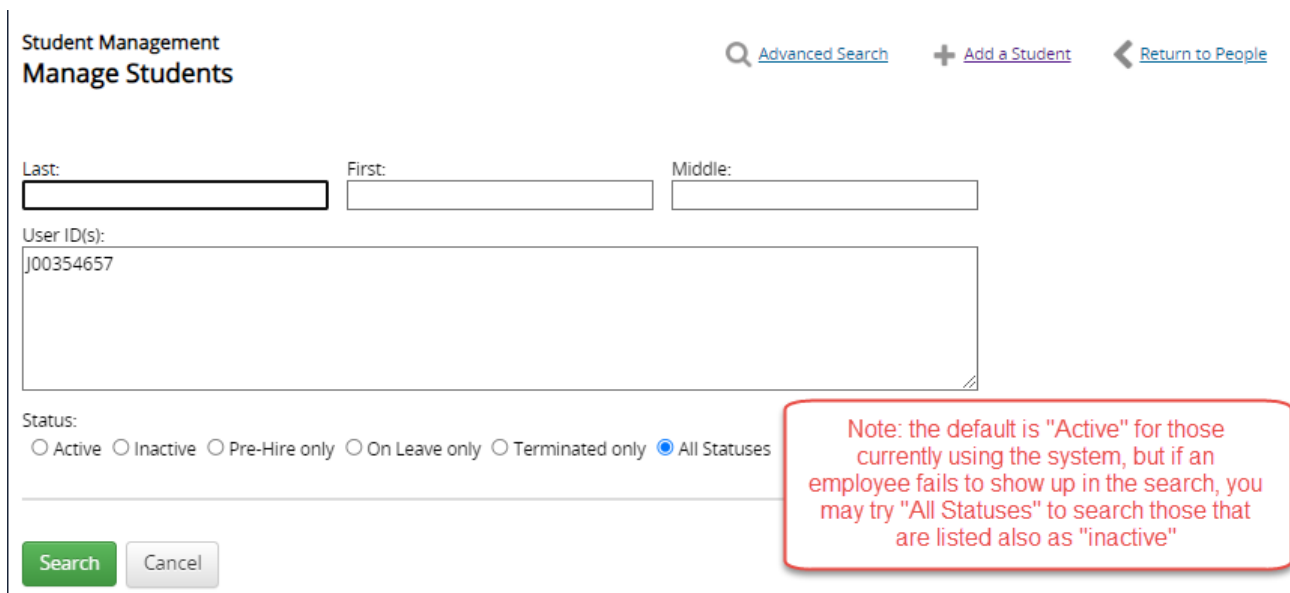


This How-To will cover creating individual assignments to staff in HealthStream. We'll specifically walk through assigning the online portion of BLS but the process is the same for all individual courses that need to be assigned (note: there will be a separate How To for group assignments, when you need to assign a course to more than one at a time)

1). The first step in the process for individual assignment, is to locate the individual staff member's account in the proper node in HealthStream. Make sure that you've logged into the node that the staff member is located in, otherwise, he/she will not show up in the search in the following step. Once you've logged in and the home screen has loaded, you may click "Manage Students" under *People*.



2). Clicking on "Manage Students" (remember, HealthStream refers to all being assigned courses as "students") opens a search panel for locating the staff member. You may type in the individual's name or, preferably, enter his/her J# in the box under "User ID" – then click "Search."



3). The next screen should show the staff member and his/her basic information. After confirming it is the individual you are looking for, click on the individual’s name. This takes you to the profile page of the staff member. Here, you can view the person’s basic job/department info and all assigned and completed courses. To assign a new course (or group of courses), click on “Assignments,” from the list on the left.

The screenshot displays the 'Manage a Student' interface in the USA Health system. On the left, a sidebar lists various management options, with 'Student Profile' highlighted and a red arrow pointing to 'Assignments'. A red callout box with white text reads: "You may wish to check the To Do list and/or Transcripts before assigning to know what has been done/assigned. Once ready to assign, click on 'Assignments'". The main content area is divided into sections: 'General Information' with input fields for 'Last Name', 'First Name', and 'Middle', and an 'Email Address' field with a 'Send Email' button; and 'Account Access' with fields for 'User ID', 'Password', 'Confirm Password', 'Hire / Re-Hire Date', 'Active Date', 'Review Month/Day', 'Password Reminder', and 'Termination Date'. The user's status is shown as 'Active'.

4). This page will show you all that is currently assigned to the staff member. You may notice multiple assignments of the same course – these are likely being assigned at different times or are parts of different groups. Generally, HealthStream courses will not assign more than once or repeating when acceptance dates are set correctly. To begin the process of assigning a new assignment to the individual, click on “Add Individual Assignment” at the top.

Student Management
View Student Assignments

[+ Add Individual Assignment](#)
[New Search](#)
[Return to Search Results](#)

ONNA MARIE ANDREWS, Clinical RN
User ID: [REDACTED]
LAST LOGIN: 7/25/2023

Reg Nurse Emrgncy Sx CL I RP in Dept. H901660 - Operating Room MC
 Reports to: Not specified

 HIRE/RE-HIRE: 1/11/2021
 ACTIVE DATE: 4/23/2023

Status **Go-Live Date** **Exemptions**
 Active Assignments Or All Go-Live Dates Show All Assigned Items

Active Assignments for Onna Marie Andrews

Item Name	Options	In the Assignment	Kind	Go-Live Date	End Date	Effective Date
2023 HIPAA Annual Training USA Health	Grant an Exemption	ALL STAFF USA HEALTH Annual 2023 (Clinical Roles)* Assigned By: Ryan Clifford Keller	Group	5/23/2023	Not Set	1/1/2023
2023 HIPAA Annual Training USA Health	View Assignment	ALL STAFF USA HEALTH Annual (Clinical Roles) JAN Assigned By: Ryan Clifford Keller	Group	1/1/2024	Not Set	11/1/2023
2023 HIPAA Annual Training USA Health	View Assignment	Annual Training for All Nursing Roles Jan Assigned By: Ryan Clifford Keller	Group	1/1/2024	Not Set	11/1/2023

Annual Training for All Nursing Roles*

5). The screen that comes up from here is where you will input the details of the assignment. The title is meant to be the title of this assignment itself (not the course/module being assigned). You will define a title and you may enter a description, before clicking on “Search Learning Items” to find the course(s) for assignment.

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

This title will just define the assignment itself

Description
You may wish to include why this is being assigned here

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.

You'll click here to search for the actual course/module to be assigned.

Dates and Settings
Set the Assignment Window
Assignment Type
How often should this assignment occur?

Upon clicking the “Search Learning Items” link, you can type in “BLS” to locate the American Red Cross: Basic Life Support course (Typically, it is the first option that comes up).

The screenshot shows a search results interface. On the left, there is a sidebar with 'Learning Items' and sub-categories: Courses, Course Bundles, Curricula, and Equivalents. Below this is a 'Expiration Date' section with 'Clear Dates' and two date input fields with calendar icons. The main content area shows search results. At the top right, it says '10 Record(s)'. Below that, there are filters for 'Results per page: 25' and 'Sort By: Name A to Z'. The first result is checked and is titled 'American Red Cross - Basic Life Support'. It includes a description: 'Ver. 1: The American Red Cross Basic Life Support course teaches healthcare providers the knowledge and skills necessary to respond to breathing and cardiac emergencies...' and metadata: 'Owner: HealthStream Status: Approved Contains: [icon]'. The second result is titled 'Basic Life Support Instructor Recertification Assessment-OL r.21 - API-HSSBLS851-OL-r.21' and includes a description: 'Ver. 2: In this course, Red Cross Instructors will learn about resuscitation science in the updated Basic Life Support (BLS) program...'.

6). Enter the details for time frame and due date option. Generally, BLS is managed by the certification put on file after completion, but for the initial certifying, you’ll select it as a “One-Time Assignment” and set the “Go Live” date as the date the assignment is being entered (there is a “today” option after clicking on the calendar icon). It’s preferable to set a specific due date, but if the staff member being assigned has just started in their position, you may click the option “Due 30 days after Hire/Active Date.” There is generally not an end date for BLS training and the effective date is default set to the current date.

The screenshot shows the 'Dates and Settings' configuration page for an assignment. The page is titled 'Dates and Settings' and has a sub-section 'Set the Assignment Window'. Under 'Assignment Type', there are two radio buttons: 'One-Time Assignment' (selected) and 'Recurring Assignment'. Under 'Go-Live Date', there is a question 'When should this assignment first appear on this person's To-Do list?'. There are two options: 'Fixed: Go-live on' with a date input field set to '07/26/2023' and a calendar icon, and 'Flexible: Go-live' with a '0' days input, a dropdown menu set to 'Hire/Active Date', and a 'beginning' label with a calendar icon. Under 'Due Date', there is a question 'For recurring assignments, this is the initial due date.' and two options: 'Due on' with an empty date input and a calendar icon, and 'Due' with '30' days, a dropdown set to 'after', and another dropdown set to 'Hire/Active Date'. Under 'End Date Optional', there is a question 'Prevent satisfaction of this assignment after this date.' and an 'End on' input field with a calendar icon. Under 'Expand the Assignment Window', there is a section for 'Effective Date' with a question 'The assignment begins looking for completions from this date forward. By setting this to an earlier date, existing completions will satisfy this assignment.' and an 'Apply completions since' input field set to '7/26/2023' with a calendar icon. At the bottom, there is a 'Grace Period' section with a question 'When available, allows completion of assignments beyond due date. Past Due students who do so appear as Completed Late on reports.' and a status 'Indefinite unless the End Date is set.' At the very bottom, there are buttons for 'Save', 'Copy', 'Cancel', and 'Delete'.

Upon clicking the “Save” button at the bottom of the current options screen, the assignment will “go live” and should appear in the staff member’s To Do list shortly after.

Note: for completion of the BLS course, the staff member will complete the first module online and, once complete, can do the skills portion for completion during any of the Staff Development BLS Checkoff sessions. No appointment is needed for these checkoffs and the calendar of times and locations can be obtained from Staff Development online or by contacting a member of Staff Development.