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*.

Ryan Clifford Keller USA University Hospital People Courses Simulation	H Administrator Education Reports Tools Services My Pro	n Alerts (9) Apps 🚓 S
People	Education	Tools
Student Management	Assignment Management	Site Management
Add a Student	Add a Group Assignment	Add a Highlight
Acquire a Student	Manage Group Assignments	Manage Highlights
Manage Students	Add an Individual Assignment	
	Add a Certification Based Assignment	
Student Group Management		Organization Management
Add a Student Group	Class Management	Manage Organization Properties
Manage Student Groups	Add a Class	
<u>Manage stadent orodps</u>	Manage Classes	Building Management
Administrator Management	View Calendar	Add a Building Resource Type
	<u>view Calendar</u>	Manage Building Resource Types
Add an Administrator		Add a Building
Acquire an Administrator	Learning Record Management	Manage Buildings and Pesources
Manage Administrators	Add a Learning Record	Manage buildings and Resources
Courses	Manage Learning Records	Institution Management

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."

Student Management Manage Students	Q Advanced Search + Add a Student C Return to People
Last: First: M User ID(s): J00354657	Middle:
Status: O Active O Inactive O Pre-Hire only O On Leave only O Terminated only O	All Statuses Note: the default is "Active" for those currently using the system, but if an employee fails to show up in the search, you may try "All Statuses" to search those that
Search Cancel	are listed also as "inactive"

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.

LS HEALTH

Ryan Clifford Keller USA University Ho	ospital <u>Administrator</u>	8	Alerts (9) Apps 🚠 Site 1	Мар 🕜 Неір 🛛 🚺 🚺 Коб очт
People Courses Simulation	on Education Reports Tools Serv	ices My Profile		
Student Management Manage a Student		Promote to	Administrator Q New Search	Return to Search Results
Student Profile Assignments To-Do List Transcript / Completed Checklist Progress Resuscitation Intervals Alerts Assignment Completion Rpt. Student Groups Licenses Certifications	User ID: Medical Student in Dept Medical Studen Reports to: Not specified You may wish to check the assigning to know what has assign, clic General mitor mation Last Name * Email Address	To Do list and/or Transcripts before been done/assigned. Once ready to k on "Assignments"	Required * Middle	LAST LOGIN: 7/12/2023 HIRE/RE-HIRE: 7/25/2023 ACTIVE DATE: 7/25/2023
Resuscitation Credentials	Account Access Access Status <u>View Audit History</u> Active Inactive Select Inactive Reason	User ID* Password * Confirm Password * Password Reminder	Hire / Re-Hire Date* 7/25/2023 + Active Date* 7/25/2023 + Review Month/Day	

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.

HOW TO ASSIGN BLS & INDIVIDUAL COURSES IN HS

		,,,,,,,					
Student Management View Student Assignments	S		🕂 Add Ir	ndividual Assignment Q	New Search Ket	urn to Seal	rch Results
Student Profile Student Profile Student Profile Student Profile Student State To-Do List Transcript / Completed Checklist Progress Resuscitation Intervals Alerts Assignment Completion Rpt. Student Groups Licenses Certifications	ANDREWS, Crima M.	User ID:				LAST LOG	ilN: 7/25/2023
	Reg Nurse Emrgncy Sx CL I RP in Dept. H901660 - Operating Room MC HIRE/RE-HIRE: 1/11/2021 Active Date: 4/23/2023 Active Date: 4/23/2023						
	Status	Go-Live Date	Exemp	tions			
	Active Assignments Or 🗸	All Go-Live Dates	✓ Shov	w All Assigned Items	Update	Reset Filter	s
	Active Assignments for Onna Marie Andrews						
····· Resuscitation Credentials ····· Personal Address & Phone	Item Name	Options	In the Assignment	Kind	<u>Go-Live</u> Date	<u>End</u> Date	Effective Date
Documents	2023 HIPAA Annual Train Health	ning USA Grant an Exemption	ALL STAFF USA HE (<u>Clinical Roles)*</u> Assigned By: Ryan C	EALTH Annual 2023 Gro	oup 5/23/2023	Not Set	1/1/2023
	2023 HIPAA Annual Trair Health	ning USA <u>View</u> Assignment	ALL STAFF USA HE (<u>Clinical Roles) JAN</u> Assigned By: Ryan C	EALTH Annual N Gro Clifford Keller	oup 1/1/2024	Not Set	11/1/2023
	2023 HIPAA Annual Train Health	ning USA <u>View</u> <u>Assignment</u>	<u>Annual Training fo</u> J <u>an</u> Assigned By: Ryan C	or <u>All Nursing Roles</u> Gro	pup 1/1/2024	Not Set	11/1/2023
			Annual Training fo	or 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.

ile	Name this Assignment * Appears in search results and certain reports. This title will just define the assignment itself	
ompleted gress Intervals	Description You may wish to include why this is being assigned here	
ompletion Rpt. ps		æ
Credentials ress & Phone	Learning Items * Q Search Learning Items Students are enrolled into the active version of a learning item when the second to the	Y TO-Do List. You'll click here to search for the actual course/module to be
	Dates and Settings	assigned.
	Set the Assignment Window Assignment Type How often should this assignment occur?	

Course Bundles

xpiration Date Clear Dates

+

+

Curricula

om

hrough

Equivalents

4

Upon clicking the "S	Search Learning Items" link, you can type in "BLS" to locate the American Red Cross: Basic	
Life Support course	e (Typically, it is the first option that comes up).	
]	Results per page: 25 V	10 Record(s)
earning Items	Sort By: Name A to Z 🗢	

American Red Cross - Basic Life Support
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. The course emphasizes active, hands-on learning and uses scenario activities to help particip...
Owner: HealthStream Status: Approved
Contains: Image: Contains: Im

Basic Life Support Instructor Recertification Assessment-OL r.21 - API-HSSBLS851-OL-r.21
Ver. 2: In this course, Red Cross Instructors will learn about resuscitation science in the updated Basic Life Support (BLS) program. Each Resuscitation SuiteTM program has been updated to reflect the latest guidance from the American Red Cross Focused Updates and...

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.

		*	
	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?	ų,	
	● Fixed: Go-live on 07/26/2023 😫		
	Flexible: Go-live 0 days after this individual's Hire/Active Date v beginning	I	
	Due Date *		
	For recurring assignments, this is the initial due date.		
	O Due on		
	Due 30 days after Hire/Active Date	l	
	End Date Optional		
	Prevent satisfaction of this assignment after this date.	I	
	End on		
		I	
	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.		
	Grace Period		
	When available, allows completion of assignments beyond due date. Past Due students who do so appear as Completed Late on reports.		
ve Copy Cancel	Indefinite unless the End Date is set. Delete	Ļ	

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.