This How-To will cover running a progress report on individual staff in HealthStream

1). The best method for finding information individual staff in HS is the Assignment Completion - Drill-Through option.



2). After selecting this, you'll be presented with a number of options for the report output. "Completion Method" focuses on what the staff members have completed, whereas "Status Method" focuses on independent assignments.

<sup>rts</sup> gnment Completion - D	Drill-Through	K Exit Report
Report Method: When searching what's been done, this is the best option.	Status Method - based on Due Date Range     The report will display Search for Courses, Curricula or Equivalents with a due date in the date range. The status     of all selected students will be displayed for each course assigned.     Completion Method - based on Completion Date Range     The report will display Search for Courses, Curricula or Equivalents that were completed in the date range. Incomplete     students will be shown as Not Yet Due, Exempt, Past Due, or Delinquent.	
Report Focus: Completion Date Range: <b>OR:</b>	Search for Courses, Curricula or Equivalents ODepartments OCompletion Grid Only     ( <u>Year To Date )</u> Through:      Trough:	
Learning:*	You can select this to see all that's been assigned/completed - or click to see and assignment or course (remember assignments are done in groups).	nents for Students Selected es. Curricula or Equivalents select All
Students:*		ort on All Active Students
On Leave Students: Report Format: Display Options:	Include      ■Exclude     ■HTML     VLS     CSV     OPDF     Group by Department     Include Student User ID	

3). After selecting what assignments/courses you are interested in reviewing status of and then inputting the staff members to be included in the report (you can add them by department, individual J#s/names, or creating a group), you'll select the details of what's included in the report and sorting options.

On Leave Students:       Include © Exclude         Report Format:       Intll OXLS OCSV OPDF         Display Options:       Group by Department         Include Student User ID       Include Student Department         Include Student Department       Include Student Department         Include Student Department       Include Student Department         Score Not Yet Due As:       Include Ocmpleted On Time Opelinquent ONot Scored         Display Criteria:       Osumary Image Detailed Appendix         Sort Detail Pages By:       Image Obscending         Sort Order:       Ascending Obscending	On Leave Students:       Include        Exclude         Report Format: <ul> <li>HTML OXLS OCSV OPDF</li> <li>Display Options:</li> <li>Group by Department</li> <li>Include Student User ID</li> <li>Include Student Department</li> <li>Include Student Department</li> <li>Include Status By Department Layer</li> <li>Score Not Yet Due As:</li> <li>Not Yet Due Ocompleted On Time Opelinquent ONot Scored</li> <li>Display Criteria:</li> <li>Summary Detailed Appendix</li> <li>Sort Detail Pages By:</li> <li>Name Ostatus</li> <li>Remember, to get individuals' data, you'll</li> </ul>	Students:*			□Report Select a Student Group	on All Active Studen Search For Studen
Report Format: <pre></pre>	Report Format: <ul> <li>HTML OXLS OCSV OPDF</li> <li>Display Options:</li> <li>Group by Department</li> <li>Include Student User ID</li> <li>Include Student Department</li> <li>Include Job Title</li> <li>Include Job Title</li> <li>Include Job Title</li> <li>Include Status By Department Layer</li> </ul> <li>Score Not Yet Due As:</li> <li>Not Yet Due O Completed On Time O Delinquent O Not Scored</li> <li>Display Criteria:</li> <li>Osummary O Detailed Appendix</li> <li>Sort Detail Pages By:</li> <li>Name O Status</li> <li>Ascending O Descending</li> <li>Remember, to get individuals' data, you'll want to have this selected. Also, keep in mind - HS refers to all being assigned</li>					
<ul> <li>□ Include Student Department</li> <li>☑ Include Job Title</li> <li>☑ Include Status By Department Layer</li> <li>Score Not Yet Due As:</li> <li>○ Summary ● Detailed Appendix</li> <li>○ Summary ● Detailed Appendix</li> <li>Sort Detail Pages By:</li> <li>● Ascending ○ Descending</li> </ul> Remember, to get individuals' data, you'll want to have this selected. Also, keep in	<ul> <li>□ Include Student Department</li> <li>☑ Include Job Title</li> <li>☑ Include Status By Department Layer</li> <li>Score Not Yet Due As:</li> <li>○ Not Yet Due ○ Completed On Time ○ Delinquent ○ Not Scored</li> <li>□ Display Criteria:</li> <li>○ Summary ● Detailed Appendix</li> <li>○ Summary ● Detailed Appendix</li> <li>○ Sort Order:</li> <li>○ Ascending ○ Descending</li> </ul> Remember, to get individuals' data, you'll want to have this selected. Also, keep in mind - HS refers to all being assigned	Report Format:	● HTML ○XLS ○CSV ○PDF ☑ Group by Department			
Display Criteria:       O Summary <ul> <li>Display Criteria:</li> <li>Sort Detail Pages By:</li> <li>Name O Status</li> <li>Remember, to get individuals' data, you'll want to have this selected. Also, keep in</li> </ul>	Display Criteria: O Summary © Detailed Appendix Sort Detail Pages By: © Name O Status Sort Order: © Ascending O Descending Remember, to get individuals' data, you'll want to have this selected. Also, keep in mind - HS refers to all being assigned		Include Student Department Include Job Title Include Job Title			
Sort Detail Pages By: <ul> <li>Name O Status</li> <li>Remember, to get individuals' data, you'll want to have this selected. Also, keep in</li> </ul> <ul> <li>Mathematical Association of the selected of the s</li></ul>	Sort Detail Pages By:          • Name O Status          Sort Order:          • Ascending O Descending          mind - HS refers to all being assigned			○ Not Scored		
		Sort Detail Pages By:	Name      OStatus	want to have this selected. Als	o, keep in	
		Show Basic Options				

4). Upon clicking the **Continue** button at the bottom left, the report will run and open the results in a separate tab within the browser. Click on this tab to view and be sure to select **View Completion Grid** to view individuals' data.

		USA Children's and Women's	
	Cumman		
	Summary	(Based on Completion Date)	
	Complet	tion Date Range: Jan 01, 2023 through Jul 24, 2023	
		Data as of: Jul 24, 2023, 1:00 am ET	
	ĸ	Report Generated: Jul 24, 2023, 11:24 am ET	
Scores			Unique Students Involved:
Total Completed:	92.19%		
On Time:	48.44%		View Completion Grid •
Late: Failed:	43.75%		
Not Yet Due:	0.00%	This is the option for viewing	
Past Due:	7.81%	individual data.	
Delinguent:	0.00%		
Total:	100.00%		
Exempt:	0		
-			
	: Completion Metho	-1	

5). Clicking the **View Completion Grid** begins the report generation for individual data; keep in mind, this process often takes a while to complete – if the system seems "stuck," give it a moment to process. This report should give you a detailed report as shown below:

## Report Description: Completion Method

This report displays all assignments completed in the date range. Incomplete assignments that intersect the date range (that is, the **assignment go-live date falls before or during the date range and the end date falls during or after the date range**) are also displayed in the lower layers of the report. The Completion Grid presents detailed status for all selected students. **NOTE:** If an assigned learning items and/or assessments was completed outside the date range specified, it will not be included in this report.

2023 EMTALA EDUCATION	2023 HIPAA ANNUAL TRAINING USA HEALTH	ATTENDANCE POLICY USA HEALTH	EMPLOYEE EDUCATION (CW)	HIPAA PRIVACY AND SECURITY USA HEALTH	LEARNING PLAN: NON- CLINICAL PART 1	LEARNING PLAN: NON- CLINICAL PART 2	AND HARASSMENT		MRI SAFETY LEVEL 1	RESPIRATORY PROTECTION USA HEALTH	RL6 EDUCATI FOR ALL USA HEALT
87.50%	100.00%	88.89%	100.00%	100.00%	100.00%	50.00%	100.00%	100.00%	100.00%	100.00%	87.50%
											+
FERILIZATI	<u>ON CW</u>										
2023 EMTALA	2023 HIPAA ANNUAL TRAINING USA HEALTH	ATTENDANCE POLICY USA HEALTH	EMPLOYEE	HIPAA PRIVACY AND SECURITY USA HEALTH	PLAN: NON- CLINICAL	PLAN: NON- CLINICAL	DISCRIMINATION AND HARASSMENT	SEXUAL	r MF E SAFI	ETY PROTE	CTION
2	87.50%	ANNUAL TRAINING EDUCATION USA HEALTH 87.50% 100.00% TERILIZATION CW 2023 HIPAA ANNUAL TRAINING USA	ANNUAL TRAINING ATTENDANCE UUSA EDUCATION IN HEALTH 87.50% 100.00% 88.89% TERILIZATION CW 2023 HIPAA ANNUAL TRAINING ATTENDANCE POLICY USA	ANNUAL TRAINING ATTENDANCE EMPLOYEE POLICY USA EDUCATION HEALTH POLICY USA 87.50% 100.00% 88.89% 100.00% EERILIZATION CW 2023 HIPAA ANNUAL TRAINING ATTENDANCE EMPLOYEE E023 EMTALA USA POLICY USA EDUCATION	ANNUAL TRAINING ATTENDANCE EMPLOYEE SECURITY USA HEALTH POLICY USA HEALTH HEALTH 87.50% 100.00% 88.89% 100.00% 100.00% TERILIZATION CW 2023 HIPAA ANNUAL TRAINING ATTENDANCE EMPLOYEE SECURITY U023 EMTALA USA POLICY USA	ANNUAL TRAINING ATTENDANCE EMPLOYEE AND SECURITY NON- SECURITY NON- SECURITY NON- CLINICAL USA CLINICAL HEALTH CLINICAL COVI HEALTH PART 1 87.50% 100.00% 88.89% 100.00% 100.00% 100.00% TERILIZATION CW 2023 HIPAA ANNUAL TRAINING ATTENDANCE EMPLOYEE SECURITY NON- SECURITY NON- SECURITY NON- SECURITY NON- SECURITY NON- SECURITY NON- CLINICAL PLAN: NON- NON- DUCY USA CLINICAL PLAN: NON- SECURITY NON- SECURITY NON- CLINICAL CLINICAL CLINICAL CON DUCY DUCY USA CLINICAL	ANNUAL TRAINING ATTENDANCE EMPLOYEE SECURITY NON- DO23 ENTALA EDUCATION HEALTH C(V) USA CLINICAL CLINICAL EDUCATION HEALTH PART 1 PART 2 87.50% 100.00% 88.89% 100.00% 100.00% 100.00% 50.00% EERILIZATION CW 2023 HIPAA ANNUAL TRAINING ATTENDANCE EMPLOYEE SECURITY NON- NON- DO23 EMTALA USA POLICY USA EDUCATION USA CLINICAL	ANNUAL ANNUAL ATTENDANCE EMPLOYEE SECURITY NON- NON- AND PLAN: PLAN: DISCRIMINATION AND POLICY USA EDUCATION USA CLINICAL CLINICAL HARASSMENT TO TO THE ALTH PART PART 1 PART 2 TO GETHER TO THE ALTH PART 1 PART 2 TO GET ALTH PART 2 T	ANNUAL TRAINING ATTENDANCE EMPLOYEE SECURITY NON- NON- AND SEXUAL AND POLICY USA EDUCATION HEALTH PART 1 PART 2 TOGETHER	ANNUAL TRAINING ATTENDANCE EMPLOYEE SECURITY NON- NON- AND SEXUAL MRI US23 ENTALA EDUCATION HEALTH HEALTH (CV) HEALTH PART 1 PART 2 TOGETHER TOGETHER LEVEL 1 87.50% 100.00% 88.89% 100.00% 100.00% 50.00% 100.00% 100.00% 100.00% EDUCATION CW TERILIZATION CW 2023 HIPAA ANNUAL TRAINING ATTENDANCE EMPLOYEE SECURITY NON- NON- AND SEXUAL MAR ANNUAL TRAINING ATTENDANCE EMPLOYEE SECURITY NON- NON- AND SEXUAL MOSAIC: ANNUAL TRAINING ATTENDANCE EMPLOYEE SECURITY NON- NON- AND SEXUAL MI 100.00% 100.00	ANNUAL TRAINING ATTENDANCE EDUCATION ATTENDANCE EDUCATION ATTENDANCE EDUCATION ATTENDANCE EDUCATION ATTENDANCE EMPLOYEE SECURITY NON- HEALTH NON-

JOB TITLE: 5583-STERILE PROCESSING TECH I	Past Due 06/30/2023	Not Assigned	Past Due 07/07/2023	Completed Late 06/06/2023 Completed On Time 06/06/2023	Completed Late 06/06/2023	Completed Late 06/09/2023	Past Due 06/16/2022	Completed Late 06/06/2023 Completed Late 06/06/2023	Completed Late 06/06/2023 Completed Late 06/06/2023	Not Assigned	Completed Late 06/06/2023	I
JOB TITLE: 30318-ASSISTANT MGR STERILE PROCESSING	Completed Late 07/10/2023	Completed On Time 06/07/2023	Completed Late 07/10/2023	Completed On Time 06/07/2023	Not Assigned	Completed On Time 06/07/2023	Completed On Time 06/07/2023	Not Assigned	Not Assigned	Completed On Time 06/07/2023	Completed On Time 06/07/2023	•
JOB TITLE: 5504-ENVIRONMENTAL SERVICES AIDE I	Not Assigned	Not Assigned	Completed Late 07/11/2023	Not Assigned	Completed On Time 07/11/2023	Not Assigned	Not Assigned	Not Assigned	Not Assigned	Not Assigned	Not Assigned	
JOB TITLE: 5583-STERILE PROCESSING TECH I	Completed Late 07/21/2023	Not Assigned	Completed Late 07/21/2023	Completed On Time 05/30/2023	Not Assigned	Not Assigned	Not Assigned	Not Assigned	Not Assigned	Not Assigned	Not Assigned	1

## **STATUS CHEET SHEET:**

Past Due - this assignment has been assigned, the "student" has not completed it, and the due date has passed

**Completed on Time** – the assignment was assigned and completed before the due date (if there are multiple lines, it means that the assignment was assigned by more than one group assignment – it will show up this way in the report, but should not appear as more than one assignment in the students' To Do lists)

**Completed Late** – the assignment was assigned and completed, but was completed after the due date of the assignment

**Not Assigned** – this student would not have been assigned the course – this is usually due to groups that are based on job title and/or department