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.

gnment Completion - [	)rill-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      Opepartments      Completion Grid Only     (Year To Date      Toron:      Through:      III Through:      III	
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).	ents for Students Selected s, Curricula or Equivalents Select All
Students: *	CRepor Select a Student Grou This option will allow you to select your department or input J#s for individual staff	t on All Active Students <u>Search For Students</u> Select All
	Oinclude ●Exclude ● utMii Ovis Ocsy Oppe	

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:       Intlude Student OxLS O CSV OPDF         Display Options:       Group by Department         Include Student User ID       Include Student Department         Include Student Department       Include Student Department         Include Student By Department       Include Student Department         Include Student Department       Include Student Department         Include Student By Department Layer       Include Stude Status By Department Layer         Score Not Yet Due As:       Include Completed On Time O Delinquent O Not Scored         Display Criteria:       Summary I Detailed Appendix         Sort Detail Pages By:       Image: Status         Sort Order:       Image: Status         Remember, to get individuals' data, you'll want to have this selected. Also, keep in mind. HS refers to all being assigned	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 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>Osummary @ Detailed Appendix</li> <li>Sort Order:</li> <li>Name OStatus</li> <li>Show Basic Options</li> </ul>	Students:*			□Report Select a Student Group	on All Active Studen Search For Studen
On Leave Students:       Include <ul> <li>Exclude</li> <li>Report Format:</li> <li>HTML OXLS OCSV OPDF</li> </ul> Display Options:         Group by Department           Include Student User ID           Score Not Yet Due As: <ul> <li>Not Yet Due</li> <li>Completed On Time Opelinquent ONot Scored</li> <li>Summary              <li>Detailed Appendix</li> <li>Sort Detail Pages By:</li> <li>Name Ostatus</li> <li>Ascending Opescending</li> </li></ul> Remember, to get individuals' data, you'll want to have this selected. Also, keep in mind. HS refores to all heing assignmend	On Leave Students: Include © Exclude Report Format:					
Include Student User ID         Include Student Department         Include Student Department Layer         Score Not Yet Due As:         Display Criteria:         Sort Detail Pages By:         Sort Order:             Remember, to get individuals' data, you'll want to have this selected. Also, keep in mind. HS refers to all being assigned	Include Student User ID         Include Student Department         Include Student Department Layer         Score Not Yet Due As:       Not Yet Due O Completed On Time O Delinquent O Not Scored         Display Criteria:       Summary O Detailed Appendix         Sort Detail Pages By:       Name O Status         Sort Order:       O Descending         Show Basic Options       Remember, to get individuals' data, you'll want to have this selected. Also, keep in mind - HS refers to all being assigned courses as "students"	On Leave Students: Report Format: Display Options:	○ Include ◎ Exclude ● HTML ○XLS ○CSV ○PDF ☑ Group by Department			
Score Not Yet Due As: <ul> <li>Not Yet Due Ocompleted On Time Opelinquent ONot Scored</li> <li>Summary Operatiled Appendix</li> <li>Sort Detail Pages By:</li> <li>Name OStatus</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>	Score Not Yet Due As: <ul> <li>Not Yet Due Ocompleted On Time Opelinquent ONot Scored</li> <li>Summary Opetailed Appendix</li> <li>Sort Detail Pages By:</li> <li>Name OStatus</li> <li>Ascending Opescending</li> </ul> Remember, to get individuals' data, you'll want to have this selected. Also, keep in mind - HS refers to all being assigned courses as "students"           Show Basic Options         Show Basic Options         Sources as "students"		<ul> <li>Include Student Department</li> <li>Include Job Title</li> <li>Include Job Title</li> <li>Include Status By Department Layer</li> </ul>			
Display Criteria: Osummary Detailed Appendix Sort Detail Pages By: Sort Order: Status Sort Order: Ascending Descending Remember, to get individuals' data, you'll want to have this selected. Also, keep in mind _ HS refers to all being assigned	Display Criteria: Osummary © Detailed Appendix Sort Detail Pages By: © Name OStatus Sort Order: @Ascending ODescending Show Basic Options Remember, to get individuals' data, you'll want to have this selected. Also, keep in mind - HS refers to all being assigned courses as "students"	Score Not Yet Due As:	Not Yet Due OCompleted On Time ODelinquent	○ Not Scored		
	Show Basic Options Courses as "students"	Display Criteria: Sort Detail Pages By: Sort Order:	Summary      Detailed Appendix     Name OStatus     Ascending Obscending	Remember, to get individuals' want to have this selected. Als mind - HS refers to all being a	data, you'll o, keep in assigned	
Show Basic Options courses as "students"		Show Basic Options		courses as "students		

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	
	Summary	(Pased on Completion Date)	
	Summary	(based on completion bate)	
	Complet	tion Date Range: Jan 01, 2023 through Jul 24, 2023	
		Data as of: Jul 24, 2023, 1:00 am El	
	ĸ	eport Generated: jul 24, 2025, 11:24 am El	
Scores			Unique Students Involved:
Total Completed:	92.19%		
On Time:	48.44%		View Completion Grid •
Late:	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	d	

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.

REPORT TOTALS												
	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	MOSAIC: PREVENT DISCRIMINATION AND HARASSMENT TOGETHER	MOSAIC: PREVENT SEXUAL VIOLENCE TOGETHER	MRI SAFETY LEVEL 1	RESPIRATORY PROTECTION USA HEALTH	RL6 EDUCATI FOR ALL USA HEALTH
ALL DEPARTMENTS	87.50%	100.00%	88.89%	100.00%	100.00%	100.00%	50.00%	100.00%	100.00%	100.00%	100.00%	87.50%
4												Þ
DEPARTMENT H902676	-STERILIZAT	<u>ION CW</u>										
STUDENT, USER ID, JOB TITLE	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	ELEARNING PLAN: NON- CLINICAL PART 2	MOSAIC: G PREVENT DISCRIMINATIC AND HARASSMENT TOGETHER	MOSA DN PREVE SEXU/ T VIOLEN TOGETE	IC: NT ICE SA HER LE	MRI RESPIR IFETY PROTE VEL 1 USA H	E ATORY I CTION EALTH

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
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

## **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