HLC Assignments Management

HealthStream Learning CenterTM



Administrator access to features and functions described in the HLC Help documentation is dependent upon the administrator's role and affiliation. Administrators may or may not have full access.

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Note: This guide is updated frequently. If you save or print this document, you should frequently cross-reference the date stamp on any local copies with the most current version posted in the Help system.

Assignments Overview

Administrators can deliver one or more courses, equivalents, or curricula to a single student or group of students by creating an HLC assignment. The following principles apply to assignments:

- Assignments can include one or more courses, equivalents, and curricula.
- Assignments can be made to individual students (individual assignment), or to one or more student groups (group assignment).
- Assignments can be one-time or recurring (if only courses are included).
- Assignments have a specified due date.
- Assigned courses and curricula appear in the Assigned Learning area of a student's My Learning page.
- Several reports are based upon assignment data.
- Assigned courses may be satisfied by a learning event, including those within an equivalent or a curriculum.
- Students may be exempted from one or more course assignment instances within a group assignment.

Assignment Timing

When creating an individual or group assignment, administrators will determine assignment timing. Assignment timing includes the following fields:

• **Effective Date** – the date on which the assignment begins and the system begins looking for assignment completion. The effective date defaults to the date of assignment creation, but may be back-dated to capture previous course completions. For example:

An assignment is created on 6/1/07 and includes the course titled Fire Safety.

Rather than leaving the effective date at the default of 6/1/07, the administrator back-dates the effective date to 1/1/07. Any students receiving the assignment who completed Fire Safety subsequent to 1/1/07 will have already satisfied that course assignment. For a recurring assignment, this is limited by (recurrence period – 1 day) rule.

Note: The assignment effective date is only applicable to assigned courses, curricula, and equivalents. Effective dates for courses within a curriculum are established separately (see *Adding a Curriculum* in this document) and may or may not utilize the assignment effective date. Also, when the assignment effective date is used for a sequential curriculum, the sequential setting in the curriculum takes precedence over the effective date. Existing course completions within the effective date must fall within the sequential order of the learning items within the curriculum before being bridged to the curriculum.

- Start Date the date on which students will first see the assigned learning in the Assigned Learning area of their My Learning pages. The default start date depends on the organization's configuration, and can be set to default to the current date, tomorrow's date, or a blank field. The start date can be set to the assignment's creation date or any date on or after the effective date (for example, January 1st of the following year). It cannot be left blank.
- End Date the date at which the assignment is no longer available. Courses, equivalents, or curricula that have not been started will be removed from the Assigned Learning area of the student's My Learning page. In-progress courses, equivalents, or curricula will fall to the Elective Learning area. This is an optional field. Students will not have courses, equivalents, or curricula that are due beyond the end date.

Note: If the grace period for a recurring assignment based on original due date extends beyond the due date of the assignment, the student will remain past due until the grace period has passed. See *Assignment Grace Periods* in this document for more information.

• **Due Date** – the date the courses, equivalents, or curricula within the assignment are required to be complete. Due dates can be fixed—that is due on a specific calendar date—or relative to each student's hire/re-hire or review dates.

Note: Once the assignment start date arrives, no changes can be made to assignment timing or assignment type other than to add or edit the assignment end date.

TIPS

- If you wish to create an assignment with a start date in the future, and you plan to use a relative due date, forward-date the effective date to equal the start date of the assignment to prevent students from being immediately past due or delinquent for the assignment (one-time) or first assignment instance (recurring assignments) when the start date arrives.
- If you wish to create an assignment with a start date in the future, and you plan to use a fixed due
 date, be sure that the due date is after the start date, so that students will have adequate time to
 complete the assignment. Edit the effective date to the date from which you wish to accept prior
 assignment completions, or make the effective date equal to the start date if you do not wish to
 allow prior completions to satisfy the assignment.

Assignment Types

There are two assignment types: One-time Assignments and Recurring Assignments.

One-time Assignments

One-time assignments require a single completion of the courses or curricula within the assignment.

Recurring Assignments

Recurring assignments allow administrators to set up an assignment that will reappear at pre-determined intervals.

Note: Equivalents and curricula cannot be included in a recurring assignment.

Recurring Assignment Options

Recurring assignments can be set up to recur at specified intervals (daily, weekly, monthly, quarterly, or annually) by adding the numeric value and selecting the desired interval from the drop-down list. Subsequent recurrences (after the first due date) can also be set to appear in the **Assigned Learning** area of the student's **My Learning** page at the desired number of days prior to the due date.

Recurrences can be based on the Original Due Date of the assignment, or the Previous Completion Date.

Recurring assignments based on **Original Due Date** means that each assignment instance is due on the same date. For example, a recurring assignment with a specified interval of one year with a due date of 6/1/07 will be due on 6/1/08, 6/1/09, etc.

Recurring assignments based on **Previous Completion Date** means that subsequent assignment instance due dates are based upon the prior course completion.

For example, a recurring assignment based on previous completion date with a specified interval of one year with a due date of 6/1/07:

- If the course is completed on 5/15/07, next year's course will be due on 5/15/08.
- If the course is completed late on 7/1/07, it will be due the next year on 7/1/08.

Note: It is important to consider how recurring assignments based upon previous completion date impact assignments that must be completed within a calendar year.

Student Status Definitions on Assignment-related Reports

The following terms are used to describe student status on assignment-related reports:

- **Exempt** The student was excused from the required assignment instance by an administrator.
- **Not Assigned** For the specified due date range, the student was not assigned the course, equivalent, or curriculum.
- Not Yet Due The due date for the course, equivalent, or curriculum shown is on or after today's
 date
- **Completed On-Time** The course, equivalent, or curriculum was completed on or before the due date.
- Completed Late The course, equivalent, or curriculum was completed after the due date.
- **Past Due** The student has passed the due date, but can still complete the assigned course, equivalent, or curriculum.
- **Delinquent** The student has passed the due date (and grace period, where applicable) and cannot complete the assigned course, equivalent, or curriculum instance. The course, equivalent, or curriculum instance is removed from the **Assigned Learning** area of the student's **My Learning** page. If the student was in progress at the time, the course, equivalent, or curriculum will remain in the **Elective Learning** area of the student's **My Learning** page.

Assignment Grace Periods

Assignments in the HLC may have a grace period, depending on the assignment type and settings. These grace periods impact what appears for student status on reports as well as what students experience on the **My Learning** tab.

Note: Students will see no messaging on page to inform them if a grace period has been applied to assigned courses or curricula.

One-Time Assignments

The following rules apply to one-time assignments:

- Any student who misses the due date becomes past due for that course, equivalent, or curriculum until it is completed.
- Any student who completes a course, equivalent, or curriculum after the due date for that course becomes completed late.
- When an end date is applied to a one-time assignment, a student completing a course, equivalent, or curriculum after the due date but prior to the end date becomes completed late. Any student who does not complete a course, equivalent, or curriculum prior to the end date is marked delinquent. The assigned course, equivalent, or curriculum is removed from the Assigned Learning area of the student's My Learning page if it has not been started. If the course, equivalent, or curriculum has been started, it drops to the Elective Learning area of the My Learning page where the student can complete the course, equivalent, or curriculum or un-enroll. Completion subsequent to the end date does not satisfy the original one-time assignment.

Recurring Assignments (course assignments only)

Recurring Assignment: Next Due Date Based on Original Due Date

For recurring assignments where the next due date is based on original due date, there can be a grace period if the grace period parameter is used. If a grace period is not explicitly stated (default value is 0), there is no grace period. The following rules apply to a recurring assignment based on original due date:

- Any student who misses the due date (with no grace period) becomes delinquent for that instance of
 the assigned course. Once the due date passes the assigned course is removed from the Assigned
 Learning area of the student's My Learning page if it has not been started. If the course has been
 started, it drops to the Elective Learning area of the My Learning page where the student can
 complete the course or un-enroll.
 - **Important:** If the student completes the course from the **Elective Learning** area, the completion will satisfy the *next* assigned course instance. Once the next recurrence appears as **Assigned Learning** (the next assignment instance), the incomplete course will no longer be available for completion under **Elective Learning**.
- Any student who misses the due date and the grace period (entered in the assignment's Grace
 Period box) becomes delinquent for that instance of the assigned course. When the grace period
 ends, the assigned course is removed from the Assigned Learning area of the student's My
 Learning page if it has not been started. If the course has been started, it drops to the Elective
 Learning area of the My Learning page where the student can complete the course or un-enroll.
 - **Important:** If the student completes the course from the **Elective Learning** area, the completion will satisfy the *next* assigned course instance. Once the next recurrence appears as **Assigned Learning** (the next assignment instance), the incomplete course will no longer be available for completion under **Elective Learning**.

• If there is an assignment end date, once the end date has passed, the student becomes delinquent for that course instance if the assignment end date arrives before the end of the specified grace period.

Note: If the end date is calculated (by the HLC) to occur before the due date, then the student will not receive that instance of the assignment, that is, not assigned.

Note: If the grace period is calculated to occur after the end date of the recurring assignment, any student in progress will remain past due until the grace period ends. Once the grace period ends, the course will drop to the **Elective Learning** area of the **My Learning** page where the student can complete the course or un-enroll.

Recurring Assignment: Next Due Date Based on Previous Completion

Recurring assignments based on previous completion date have an open-ended grace period for courses that are not completed by the due date. The following rules apply to recurring assignments based on previous completion date:

- Any student who misses the due date for an assigned course becomes past due for that instance until
 the course is completed. If not completed, the course remains in the **Assigned Learning** area of the
 student's **My Learning** page unless or until an end date is applied to the assignment.
- Any student who completes a course after the due date for that instance of the assigned course becomes completed late.
- Any student who does not complete the course prior to the assignment end date, if applied, becomes
 delinquent. The assigned course will be removed from the Assigned Learning area of the student's
 My Learning page if it has not been started. If the course has been started, it drops to the Elective
 Learning area of the My Learning page where the student can complete the course or un-enroll.
 Subsequent course completion will not change the student's delinquent status for the assignment
 instance.

Note: If the end date is calculated to occur before the next due date, then the student does not receive that instance of the assignment, that is, not assigned.

If the recurrence date for an assignment is set to display before the previous assignment instance due date, it is possible for a student to complete the same course more than once before the end of the first instance (that is, to have multiple completions for one assignment instance). This happens because an assignment instance ends with the due date.

If a student completes an assigned course more than once within an assignment instance, only the *latest* completion of the course will be applied to that due date on assignment-based reports. The student will still appear as **Completed On-Time** using the latter completion and will only show one completion on assignment-based reports. The student's transcript and the Course Completion reports will show all course completions.

Example

A student sees a course on the **My Learning** page on 1/1/2008 and is due on 12/31/2008.

The assignment's recurrence date is 180 days. The due date is based on previous completion date.

The student completes the assigned course on 1/15/2008, making the next due date 1/15/2009.

The next course assignment appears on the **My Learning** page on 7/28/2008 – 180 days prior to the due date of 1/15/09 but before the current instance's due date of 12/31/08.

If the student completes the course again - prior to 12/31/08 (the due date of the prior assignment instance), the latter course completion is the one that will satisfy that instance.

Instead of satisfying the 1/15/09 due date (which was created by the original 1/15/2008 completion), the due date will be moved further out to be one year from the most recent completion. To illustrate:

Student sees the course again on the My Learning page on 7/28/08.

Student completes the course on 8/1/08.

Due date of 1/15/09 is recalculated to 8/1/09.

When an administrator creates reports:

The student will appear on Assignment-based reports as **Completed On-Time** with a date of 8/1/08 (instead of 1/15/08).

Both completions (1/15/08 and 8/1/08) will appear on the transcript and Course Completion reports.

Assignment Delivery Rules

Several rules are in place within the HLC to ensure consistent delivery of assignments:

- The effective date of a recurring assignment cannot be backdated further than the length of the recurrence period less one day from the initial due date (for example, two-year assignments cannot be backdated more than 729 days, and a one-year assignment cannot be backdated more than 364 days).
- To ensure that the system utilizes the most recent course completion when calculating the next assignment recurrence:

When there is more than one course completion within the same assignment period, the system utilizes the most recent completion to satisfy the assignment due date of the course. If the student completes the course late, then the system will use the first completion after the due date.

This rule causes the system to recognize the most current completion date relevant to the due date.

Active Date Changes

The purpose of the active date (field on the student record) is to provide a mechanism by which a student's assignments may be re-set based upon that date. The active date may be utilized to track student status changes including department changes, job title changes, or returns from leave of absence (LOA). It is important to note that all assignment due dates are re-calculated when the active date is changed. The active date can be changed via the data import file or be changed manually on the student's record by an administrator.

New assignment due dates are calculated when the student's designated active date is changed to a date subsequent to the student's hire/ re-hire date and there are past due assignments on student's **My Learning** page. If the active date is edited for a student record, all assignments will be adjusted based upon the newly entered active date. This action prevents students with status changes (for example, transferring to a new department) from becoming immediately delinquent.

Important: Past due assignments from a one-time assignment with a fixed due date are removed from the student's **My Learning** page. All other assignment due dates are recalculated, and assignments considered past due prior to the edit of the active date will display newly calculated due dates that are subsequent to the active date. If the active date is prior to the due date of any previously-delivered assignments, the assignment will be removed from the student's **My Learning** page.

Note: The active date must be set to the hire/re-hire date or a date thereafter. When a student record is imported, the active date is defaulted to the hire/re-hire date unless the active date field is included in the data import. If a subsequent import is received for the same student reflecting a new hire/re-hire date with no active date field, the active date will default to that date.

Any subsequent import that includes a hire/re-hire date but not an active date will not affect the manually-changed active date, as long as that date is after the hire/re-hire date. Import files that contain active dates will override manual active date changes.

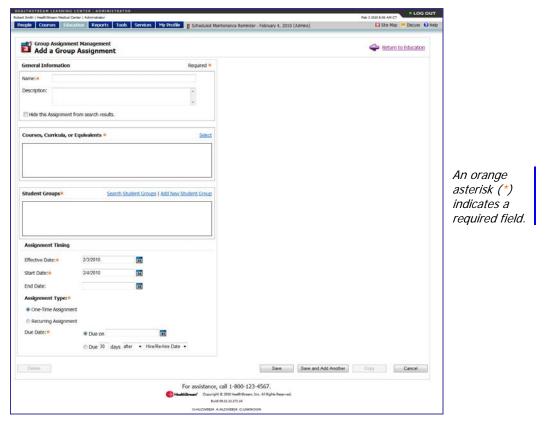
Group Assignments

Group assignments allow delivery of one or more assigned courses, equivalents, or curricula to groups of students within the HLC.

Adding a Group Assignment

To add a group assignment

1. On the **Education** tab, click **Add a Group Assignment**. The **Add a Group Assignment** page appears.



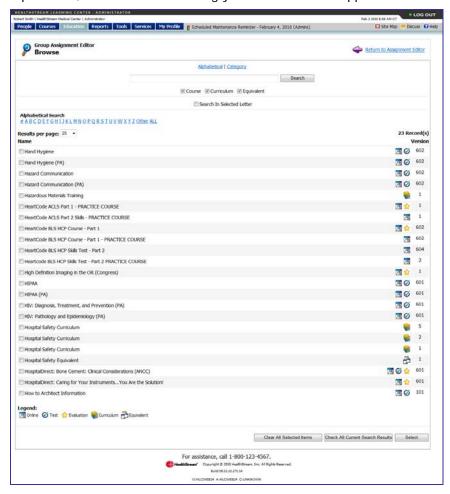
- 2. In the **Name** box, enter the group assignment name.
- 3. In the **Description** box, enter a description of the group assignment, if desired. The assignment description will appear on the Assigned Courses report.
- 4. Select the **Hide the Assignment from Search Results** check box if you wish to hide this assignment from routine search returns (which displays visible assignments by default).

Tip: Assignments can be made visible or hidden at any time. You may wish to hide assignments that are no longer active as a way of removing them from routine group assignment search. The default group assignment search selection is visible, however hidden assignments can also be searched, and assignments can be changed from visible to hidden at any time.

5. Click **Select**. The **Browse** page appears with the **Course**, **Equivalent**, and **Curriculum** check boxes selected. Clear a check box to deselect that option.

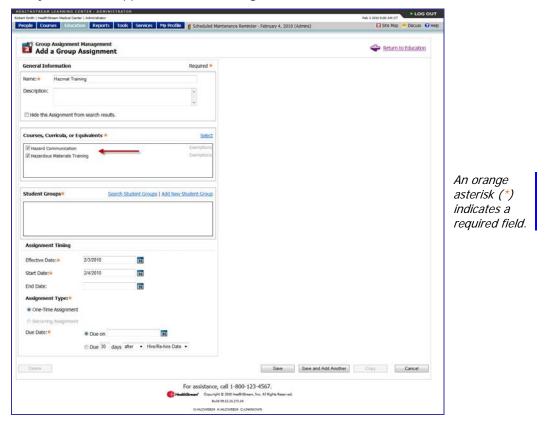


6. Perform a search. Search by title, keyword, alphabetically or by category. A list of all courses, equivalents, and curricula matching your search criteria appears.

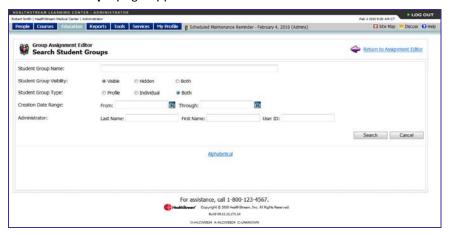


7. Click the check box to the left of the desired course, equivalent, or curriculum name or click **Check All Current Search Results** to select all courses.

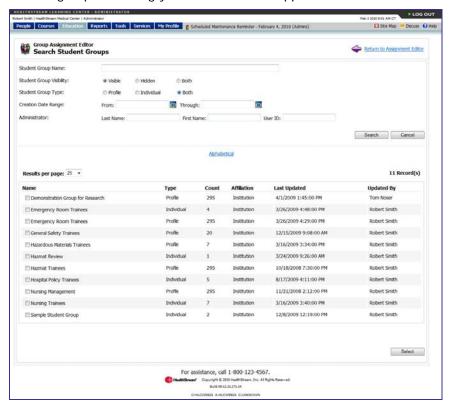
- 8. To add more courses, equivalents, or curricula, continue to search for by keyword or browsing alphabetically or by category, even if the courses are found on separate pages. (There is no need to repeat the search process.)
- 9. Click **Select** to return to the group assignment editor. The courses, equivalents, and curricula names that you selected appear in the **Learning** box.



- 10. Clear the check box to the left of the course, equivalent, or curriculum name to remove a course, equivalent, or curriculum that you previously selected, if desired.
- 11. Click **Search Student Groups** to select student groups to receive the assignment. The **Search Student Groups** page appears.



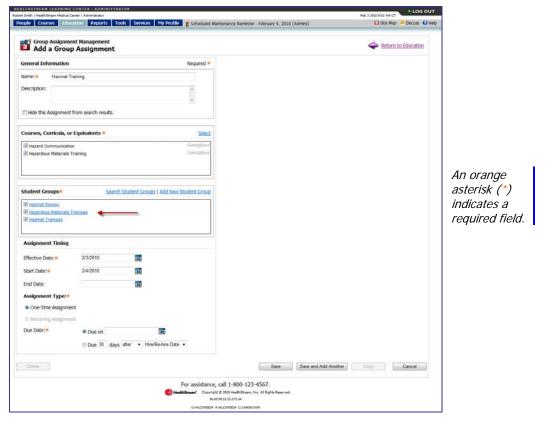
12. Perform a student group Search to use an existing student group with this assignment. A listing of student groups matching your search criteria appears.



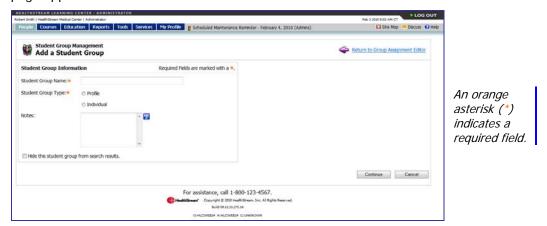
- 13. Click the check box to the left of the desired student group name(s).
- 14. To add more student groups, continue to search for student groups by keyword or browsing, even if the student groups are found on separate pages. There is no need to repeat the search process.

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15. Click **Select** to return to the group assignment editor. The student groups that you selected appear in the **Student Groups** box.



- 16. Clear the check box to the left of the student group name to remove a group that you previously selected, if desired.
- 17. Click **Add New Student Group** if you require a new student group. The **Add a Student Group** page appears.



18. Create the new student group. (See *Adding a Profile Student Group* or *Adding an Individual Student Group* in the *HLC Student Group Management* user guide.)

Reports Tools Services My Profile | Scheduled Maintenance Reminder - February 4, 2010 (Admir ☐ Ste Map Discuss • Help Add a Group Assignm Return to Education Courses, Curricula, or Equivalents Hazardous Materials Training An orange asterisk (*) Student Groups Search Student Groups | Add New Student Group indicates a Hazardous Materials Trainees required field. Hazmat Trainees 811 Fnd Date ent Type: One-Time Assignment Due Date:* Due on Due 30 days after
 Hire/Re-hire Date Save Save and Add Another Copy Cancel For assistance, call 1-800-123-4567.

19. Click **Save and Return** after creating the new student group to return to the group assignment editor. The student group that you created appears in the **Student Groups** box.

20. In the Effective Date box, change the effective date, if desired. The effective date is the date on which the assignment begins, and the date from which the system begins looking for completions of the assigned learning items. The effective date defaults to today's date, but can be back-dated to accept prior completions to satisfy the assignment.

Tip: You can also click **11** to select the date.

Note: Each learning item within a curriculum includes an effective date that can be set to **X** number of days prior to enrollment in the course or equivalent within the curriculum (the relative effective date). See *Adding a Curriculum* in the *HLC Curricula Management* user guide. Enrollment occurs when a student clicks the **Enroll** button for a course, equivalent, or equivalent course within the curriculum. Additionally, each learning item can be set to allow the assignment effective date (the fixed effective date) to serve as the effective date for the learning item. If the assignment effective date option is used, the relative effective date (if added) will only apply if the curriculum is chosen as elective learning from the student **Catalog** tab.

21. In the **Start Date** box, change the start date, if desired. The start date is the date on which assigned courses, equivalents, or curricula will appear on the students' **My Learning** page. The start date defaults to tomorrow's date but can be changed to today's date or a date in the future. The start date can be set in the past, as long as it is set to on or after the effective date.

Tip: You can also click **11** to select the date.

22. In the **End Date** box, enter an end date, if desired. Once an assignment end date arrives, the assigned courses, equivalents, or curricula cannot be completed to satisfy the assignment and student is marked as **Delinquent** on assignment-related reports. Courses or curricula that have not been started will be removed from the **My Learning** page. In-progress courses, equivalents, or curricula will be moved to the **Elective Learning** area where they can be completed as an elective, or the student can un-enroll.

Tip: You can also click III to select the date.

23. Click **One-Time Assignment** or **Recurring Assignment** to indicate the assignment type.

Note: Curricula and equivalents can be included in one-time assignments only.

If you select recurring assignment, the page will refresh and additional recurring assignment options are displayed.

- Select a recurrence interval by entering a numeric value and selecting the desired interval from the list (for example, recurs every 2 years).
- If you select **Recurring Assignment based on Original Due Date**, then you may enter add an optional grace period (in days) in the **Grace Period** box, if desired.
- The recurrence date defaults to 180 days but can be changed if desired. The recurrence date is the date on which the next assignment instance will appear on a student's **My Learning** page.
- 24. In the **Due Date** box, enter date on which the assignment is due. The due date can be either a fixed calendar date, or can be set to a date relative to each assigned student's hire/re-hire or review date.

Tip: You can also click 1 to select the date.

25. Click Save.

Searching for a Group Assignment

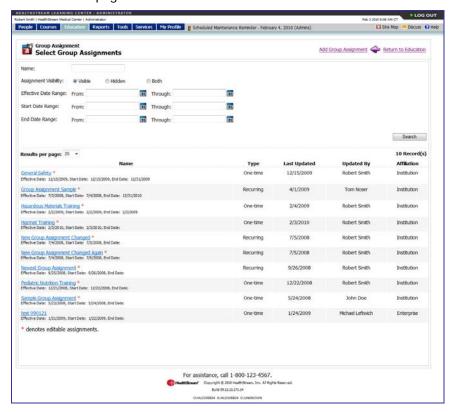
To search for a group assignment

On the Education tab, click Manage Group Assignments. The Select Group Assignments
page appears.



2. Enter search criteria. The more search criteria that you add, the narrower the search return will be.

3. Click **Search**. A listing of all group assignments matching the search criteria will appear at the bottom of the page.



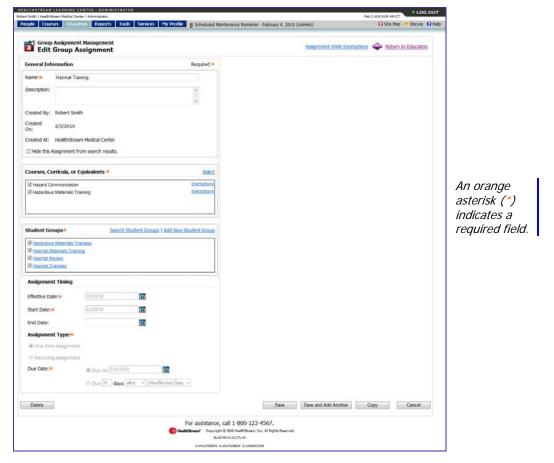
4. Click the name of the desired group assignment. You may now either edit or delete the selected group assignment. See *Editing a Group Assignment and Deleting a Group Assignment*.

Editing a Group Assignment

Carefully plan group assignment edits with consideration of how edits may affect reports, student assignments or student completions.

To edit a group assignment

- 1. Perform a group assignment search. See *Searching for a Group Assignment* in this document for details on conducting a group assignment search.
- 2. Click the name of the desired group assignment. The Edit Group Assignment page appears.



- 3. Make the desired edits, keeping the following in mind:
 - If you add a new course, equivalent, or curriculum to the group assignment, the new course, equivalent, or curriculum will appear on the students' **My Learning** page.
 - If you remove a course, equivalent, or curriculum from the group assignment, the course, equivalent, or curriculum will be removed from the Assigned Learning area of the students' My Learning page if the course, equivalent, or curriculum has not been started. If the course, equivalent, or curriculum has been started, it will drop to the Elective Learning area of the student's My Learning page where the student can complete the learning or un-enroll.
 - If you add additional student groups to the group assignment, the students in the added student groups will see the assigned courses, equivalents, and curricula on their **My Learning** pages.

If you remove an assigned student group from the group assignment, the students in the
removed group will have the assigned courses, equivalents, or curricula removed from the
Assigned Learning area of the My Learning page if the course, equivalent, or curricula has
not been started. Courses, equivalents, or curricula that have been started will drop to the
Elective Learning area of the My Learning page where students can complete the learning or
un-enroll.

Note: Assignment Timing (other than the **End Date**) and **Assignment Type** cannot be edited once the assignment start date has arrived.

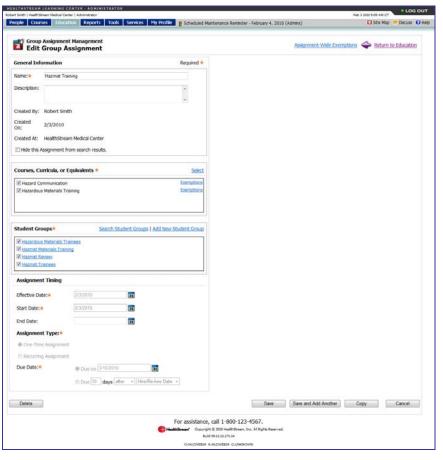
4. Click Save.

Copying a Group Assignment

At times, you may wish to copy a group assignment. This will allow you to make edits, while preserving original assignment data. This feature can also be used to as a short-cut for replicating prior assignments, for instance when you wish to assign a modified version to another student group. You may also wish to copy an assignment if you need to edit assignment timing (which is not editable once the original assignment start date arrives). Copying an assignment does not copy student exemptions.

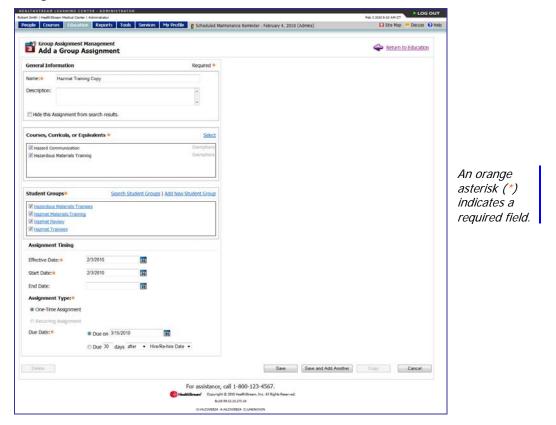
To copy a group assignment

- 1. Perform a group assignment search. See *Searching for a Group Assignment* in this document for details on conducting a group assignment search.
- 2. Click the name of the group assignment that you want to edit. The **Edit Group Assignment** page appears.



An orange asterisk (*) indicates a required field.

3. Click **Copy** to create a copy of the original assignment. The copy will be named **Copy of [original assignment name]**.



- 4. Make desired edits to the assignment copy.
- 5. Click Save.

Note: If the copy was created to replace an existing group assignment, consider:

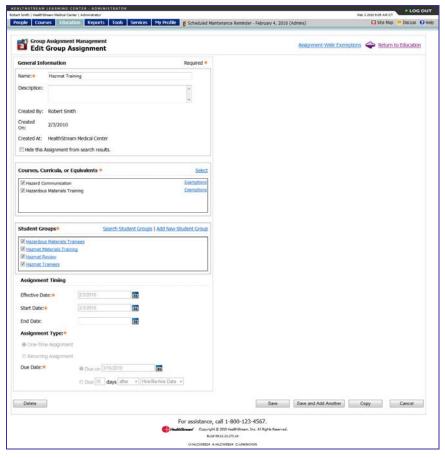
- Clicking **Delete** only if you know students have not yet completed any of the assigned courses, equivalents, or curricula, or if you do not need to preserve assignment completion report data.
- Adding an End Date (today's date) to end the original assignment, but preserve all assignmentrelated completion data for reports.

Deleting a Group Assignment

Note: Deleting a group assignment removes assignment-related completion data for reports. Only delete an assignment if you know students have not yet completed any of the assigned courses, equivalents, or curricula, or if you do not need to preserve assignment completion report data.

To delete a group assignment

- 1. Perform a group assignment search. See *Searching for a Group Assignment* in this document for details on conducting a group assignment search.
- 2. Click the name link of the group assignment that you want to delete. The **Edit Group Assignment** page appears.



An orange asterisk (*) indicates a required field.

- 3. Click **Delete**. A confirmation prompt appears.
- 4. Click **OK** to delete the group assignment.

Creating Assignment Exemptions

Students who have received course, equivalent, or curriculum assignments but are not required to complete an assigned course, equivalent, learning item within a curriculum, or an entire curriculum, can be exempted.

- Exempted courses, equivalents, and curricula are removed from a student's My Learning page
- Exempted learning items within a curriculum remain on a student's **My Learning** page, but are marked Exempt when the student clicks the **Enroll** button from the **Curriculum Details** page.
- Students are marked as Exempt on assignment-related reports.

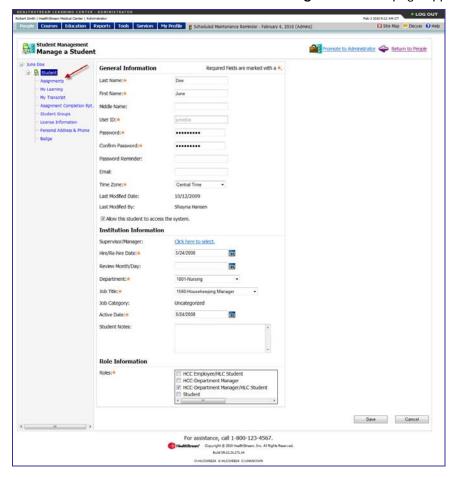
Course, equivalents, and curriculum exemptions can be created by student via the **Assignments** link on the student information page, by course, equivalent, or curriculum via the assignment editor page, or can be created for the entire assignment using the **Assignment-wide Exemptions** link on the assignment editor page. Exemptions for a learning item within a curriculum can only be created by student. Exemption functionality is not available until the assignment has been saved and the start date has arrived.

Note: Exemptions are assignment-specific. Student groups can be edited to exclude or delete students so that they do not receive any assignments made to the student group.

Creating an Exemption by Student

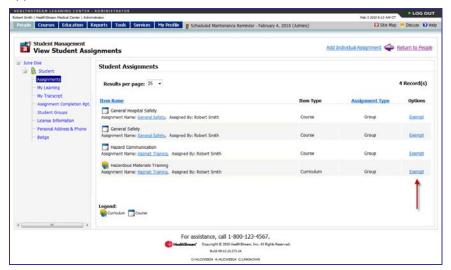
To create an exemption by student

- 1. Perform a student search. See *Searching for a Student* in the *HLC Student Management* user guide for details on conducting a student search.
- 2. Click the name of the desired student. The **Manage a Student** page appears.



An orange asterisk (*) indicates a required field.

3. Click **Assignments** from the left-hand navigation tree. The **View Student Assignments** page appears.



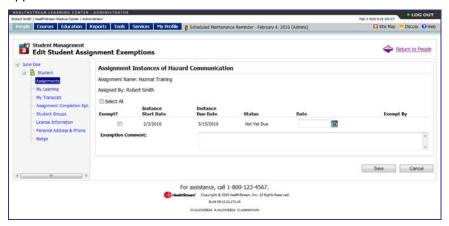
You can now create a course exemption, an equivalent exemption, a learning item exemption from a curriculum, or a curriculum exemption.

Note: When making exemptions from the assignment page you have the option of adding an exemption comment for each exemption.

Creating a Course Exemption

To create a course exemption

 Click Exempt to the right of the course name associated with the specific assignment instance for which you wish to create an exemption. The Edit Student Assignment Exemptions page appears.



Note: There may be more than one instance of the course listed (if the course is part of a recurring assignment). You can exempt students from both the current and previous assignment instances if desired.

- 2. Select the check box to the left of each assignment instance for which you wish to create an exemption (there may be multiple instances for a recurring assignment) or click **Select All**.
- 3. In the **Date** box, enter an exemption date.

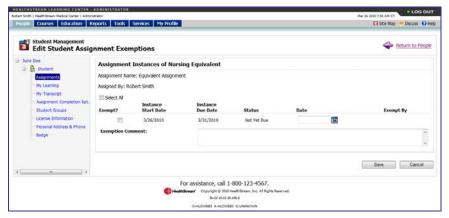
Tip: You can also click **11** to select the date.

- 4. Enter an optional exemption comment. Exemption comments are displayed on the **Assignments** page under each student profile.
- 5. Click Save.

Creating an Equivalent Exemption

To create an equivalent exemption

1. Click **Exempt** to the right of the equivalent name for which you wish to create an exemption. The **Edit Student Assignment Exemptions** page appears.



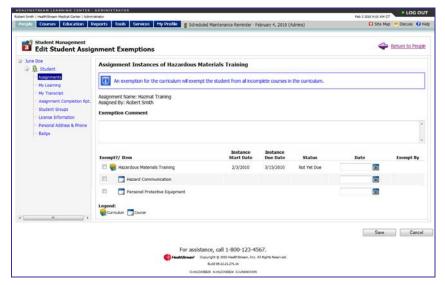
Note: There may be more than one instance of the equivalent listed (if the equivalent is part of a recurring assignment). You can exempt students from both the current and previous assignment instances if desired.

- 2. Select the check box to the left of each assignment instance for which you wish to create an exemption (there may be multiple instances for a recurring assignment) or click **Select All**.
- 3. In the **Exemption Date** box, enter an exemption date.
 - **Tip:** You can also click **to** select the date.
- 4. In the **Exemption Comment** text box, enter an optional exemption comment. Exemption comments are displayed on the **Assignments** page under each student profile.
- 5. Click **Save**. The assigned equivalent will be removed from the student's **My Learning** page. The exemption date will appear below the name link of the equivalent from the administrator view of the student's assignments.

Creating an Exemption by Student for a Learning Item in a Curriculum

To create an exemption by student for a learning item in a curriculum

- 1. Perform a student search. See *Searching for a Student* in the *HLC Student Management* user guide for details on conducting a student search.
- Click Exempt to the right of the curriculum associated with the specific assignment instance for which an exemption is desired. The Edit Student Assignment Exemptions page appears.



Note: The curriculum will be listed with all its associated courses and equivalents. There are icons to help you know which items are courses, which are equivalents and which are curriculums. Any items the student has completed will appear with the status **Complete** and their completion date in the date column. You cannot exempt a student from an item they have already completed.

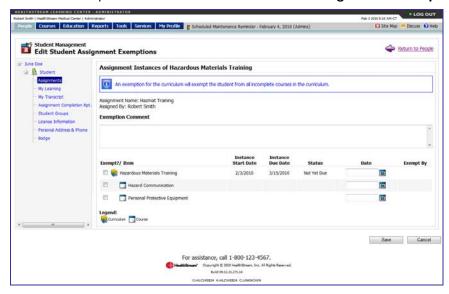
- 3. Select the check box to the left of each course or equivalent for which you wish to create an exemption.
- 4. In the **Exemption Date** box, enter the exemption date.
 - Tip: You can also click 311 to select the date.
- 5. Enter an optional exemption comment. Exemption comments are displayed on the **Assignments** page under each student profile.
- 6. Click **Save**. If the student has not yet started the course within the curriculum, the **Enroll** button must be clicked by the student for the system to recognize the exemption. If the student has already begun the exempted course, the exemption will be recognized immediately.

Note: Exempting a student from a course within a curriculum does not exempt the student from other assignment instances of the same course.

Creating an Exemption by Student for an Entire Curriculum

To create an exemption by student for an entire curriculum

1. Click **Exempt** to the right of the curriculum associated with the specific assignment instance for which an exemption is desired. The **Edit Student Assignment Exemptions** page appears.



Note: The curriculum will be listed with all its associated courses and equivalents. There are icons to help you know which items are courses, which are equivalents, and which are curriculums. Any items the student has completed will appear with the status **Complete** and their completion date in the date column. You cannot exempt a student from an item they have already completed.

- 2. Select the check box to the left of the curriculum to exempt the entire curriculum.
- 3. In the **Exemption Date** box, enter the exemption date.

Tip: You can also click **31** to select the date.

- 4. Enter an optional exemption comment. Exemption comments are displayed on the **Assignments** page under each student profile.
- 5. Click Save.

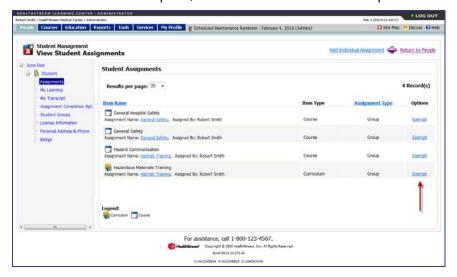
Editing an Exemption by Student

To edit an exemption by student

- 1. Perform a student search. See *Searching for a Student* in the *HLC Student Management* user guide for details on conducting a student search.
- 2. Click the name link of the desired student. The **Manage a Student** page appears.



3. Click **Assignments** from the left-hand navigation tree. The **Student Assignments** page appears. Follow the instructions below to edit a course exemption, an equivalent exemption, a learning item within a curriculum exemption, and an entire curriculum exemption.

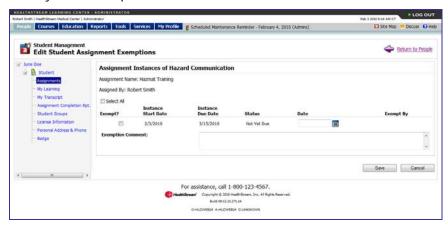


You can now edit a course exemption, an equivalent exemption, a learning item exemption from a curriculum, or a curriculum exemption.

Editing a Course Exemption

To edit a course exemption

1. Click **Exempt** to the right of the course associated with the specific assignment instance for which an exemption is desired. The **Edit Student Assignment Exemptions** page appears. Items that have already been exempted will have a check in the check box.



- 2. Do one of the following:
 - Clear the check box to the left of the course if you wish delete an exemption.
 - Change the date in the date box if you wish to change the exemption date.
- 3. Enter an optional exemption comment. Exemption comments are displayed on the **Assignments** page under each student profile.
- 4. Click Save.

Editing an Equivalent Exemption

1. Click **Exempt** to the right of the equivalent associated with the specific assignment instance for which you want to edit an exemption. The **Edit Student Assignment Exemptions** page appears. Items that have already been exempted will have a check in the check box.



- 2. Do one of the following:
 - Clear the check box to the left of the course if you wish delete an exemption.
 - Change the date in the date box if you wish to change the exemption date.

Note: If you wish to change a student's exemption date, you must delete the original exemption and then add the student and enter the new exemption date.

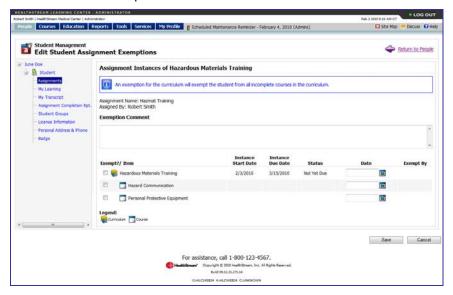
- 3. Enter an optional exemption comment. Exemption comments are displayed on the **Assignments** page under each student profile.
- 4. Click Save.

Note: If an exemption is removed, the student will return to the pre-exemption assignment status for the equivalent.

Editing an Exemption by Student for a Learning Item in a Curriculum

To edit an exemption of an item within a curriculum

1. Click **Exempt** to the right of the curriculum associated with the specific assignment instance for which an exemption is desired. The **Edit Student Assignment Exemptions** page appears. Items that have been exempted will have a check in the check box.



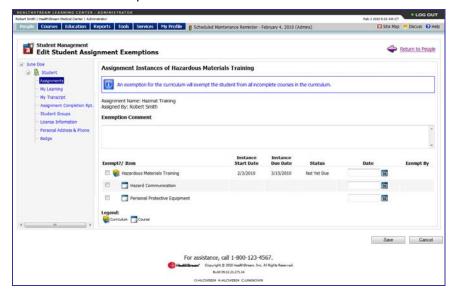
Note: The curriculum will be listed with all its associated courses and equivalents. There are icons to help you know which items are courses, which are equivalents and which are curriculums. Any items the student has completed will appear with the status **Complete** and their completion date in the date column. You cannot exempt a student from an item they have already completed.

- 2. Do one of the following:
 - Clear the check box to the left of the course if you wish delete an exemption.
 - Change the date in the date box if you wish to change the exemption date.
- 3. Enter an optional exemption comment. Exemption comments are displayed on the **Assignments** page under each student profile.
- 4. Click Save.

Editing an Exemption by Student for an Entire Curriculum

To edit an exemption of an entire curriculum

1. Click **Exempt** to the right of the curriculum associated with the specific assignment instance for which an exemption is desired. The **Edit Student Assignment Exemptions** page appears. Items that have been exempted will have a check in the check box.



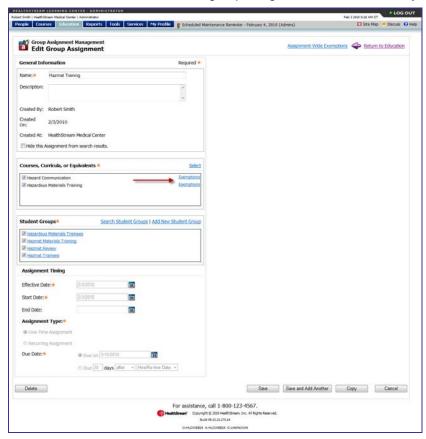
Note: The curriculum will be listed with all its associated courses and equivalents. There are icons to help you know which items are courses, which are equivalents and which are curriculums. Any items the student has completed will appear with the status **Complete** and their completion date in the date column. You cannot exempt a student from an item they have already completed.

- 2. Do one of the following:
 - Clear the check box to the left of the curriculum to delete the curriculum exemption.
 - Change the date in the date box if you wish to save the exemption date.
- 3. Enter an optional exemption comment. Exemption comments are displayed on the Assignments page under each student profile.
- 4. Click Save.

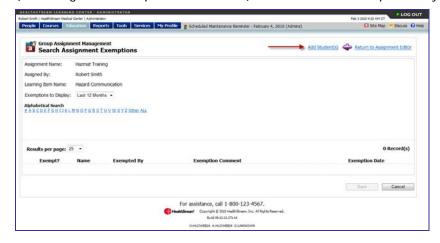
Creating an Exemption by Course, Equivalent, or Curriculum

To create an exemption by course, equivalent, or curriculum

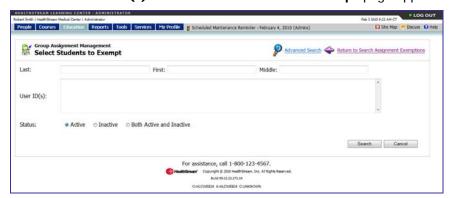
- 1. Perform a group assignment search. See *Searching for a Group Assignment* in this document for details on conducting a group assignment search.
- 2. Click the name link of the desired group assignment. The Edit Group Assignment page appears.



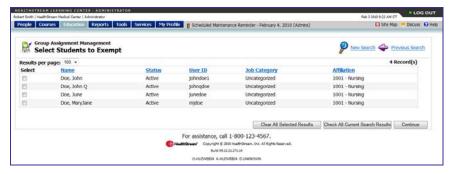
3. Click **Exemptions** to the right of the course, equivalent, or curriculum for which you wish to create exemptions. The **Search Assignment Exemptions** page appears, and displays the assignment name, assignment creator name, course/equivalent/curriculum name and exemption search criteria (date range list and alphabetical search). In addition, a list of previously exempted students appears.



4. Click Add Student(s). The Select Students to Exempt page appears.

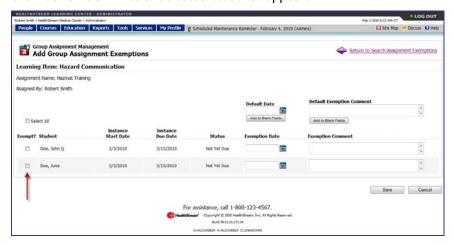


5. Perform a student search using basic criteria or advanced search criteria by clicking the **Advanced Search** link.



Note: Only students who received the assignment will be returned in the student search.

- 6. Select the check box to the left of the desired students' names, or click **Check All Current Search Results**.
- 7. Click **Continue**. A list of selected students appears.



8. Confirm the exemption by selecting the check box to the left of each student's name, or by selecting the **Select All** check box to select all students.

Note: It is possible for a course to appear in the curriculum as well as within one or more equivalents in the same curriculum. When an exemption is made to the course, it is not associated to any other instances of the course in any equivalents within in the curriculum.

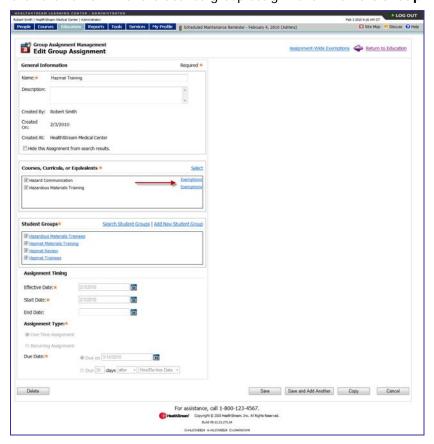
Note: There may be more than one instance of the course listed (if the course is part of a recurring assignment). You can exempt students from both the current and previous assignment instances if desired. Equivalents and curricula will only appear in one-time assignments.

- 9. In the **Exemption Date** box, enter a new exemption date. The exemption date defaults to today's date, but can be changed for each student.
 - Tip: You can also click to select the date.
- 10. Enter an optional exemption comment to the right of each student's exemption date. Exemption comments are displayed on the **Assignments** page under each student profile.
- 11. Click Save.

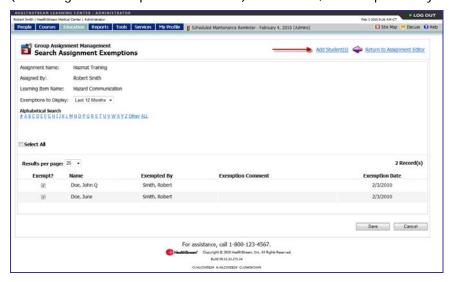
Editing an Exemption by Course, Equivalent, or Curriculum

To edit an exemption by course, equivalent, or curriculum

- 1. Perform a group assignment search. See *Searching for a Group Assignment* in this guide for details on conducting a group assignment search.
- 2. Click the name link of the desired group assignment. The Edit Group Assignment page appears.



3. Click **Exemptions** to the right of the course, equivalent, or curriculum for which you wish to edit exemptions. The **Search Assignment Exemptions** page appears, and displays the assignment name, assignment creator name, course/equivalent/curriculum name and exemption search criteria (date range list and alphabetical search). In addition, a list of previously exempted students appears.



- 4. Do one of the following:
 - Click **Add Students** if you wish to exempt additional students (see *Creating an Exemption by Course, Equivalent, or Curriculum* in this guide).
 - Clear the check box to the left of students' names if you wish to remove the exemption.

Note: If you wish to change a student's exemption date, you must delete the original exemption and then add the student and enter the new exemption date.

- 5. Enter an optional exemption comment. Exemption comments are displayed on the **Assignments** page under each student profile.
- 6. Click Save.

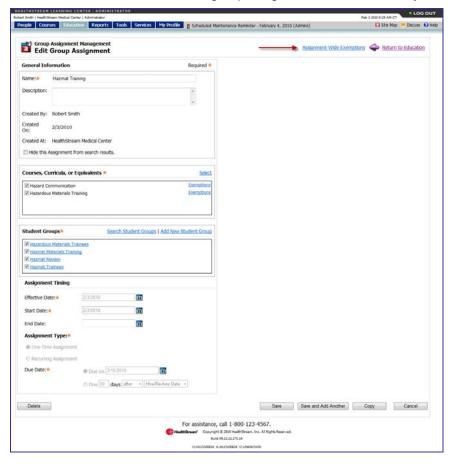
Note: If an exemption is removed, the student will return to the pre-exemption assignment status.

Creating an Exemption by Assignment

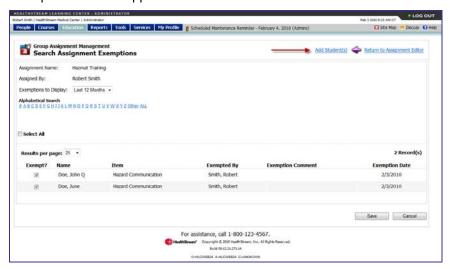
Exemptions can be created for multiple students and multiple courses, equivalent, or curricula in a single assignment.

To create an exemption by assignment

- 1. Perform a group assignment search. See *Searching for a Group Assignment* in this document for details on conducting a group assignment search.
- 2. Click the name link of the desired group assignment. The **Edit Group Assignment** page appears.



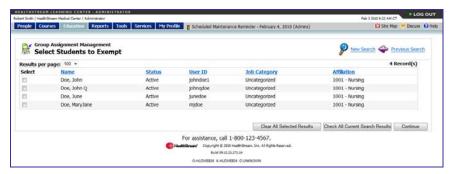
3. Click **Assignment-Wide Exemptions**. The **Search Assignment Exemptions** page appears, and displays the assignment name, assignment creator name, course/equivalent/curriculum name and exemption search criteria (date range list and alphabetical search). In addition, a list of previously exempted students appears.



4. Click Add Student(s). The Select Students to Exempt page appears.



 Perform a student search using basic criteria or advanced search criteria by clicking the **Advanced** Search link.



Note: Only students who received the assignment will be returned in the student search.

6. Select the check box to the left of the desired students' names, or click **Check All Current Search Results**.

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7. Click **Continue**. A list of selected students appears.

8. Enter or select a single default date and click **Add to Blank Fields** to make this date the exemption date for all selected students, or enter a specific exemption date for each student in the **Exemption Date** box to the right of each student's name.

Tip: You can also click **11** to select the date.

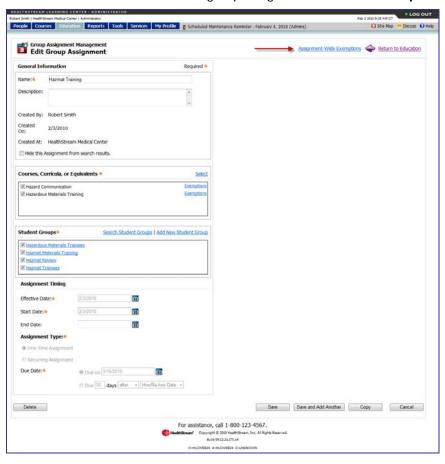
- 9. Enter an optional default exemption comment and click **Add to Blank Fields** to display this comment to all selected students, or enter a specific exemption comment for each student in the **Exemption Comment** box to the right of each student's exemption date.
 - **Tip:** An assignment-wide exemption will not replace any existing course-, equivalent-, or curriculum-level exemption dates or comments. Existing exemptions remain intact.
- 10. Click **Save**. The selected students will be exempted from all courses, equivalent, and curricula within the assignment.
- 11. If you wish to un-exempt students from one or more of the learning items, clear the **Exempt?** check box to the left of the student's name for the learning items you wish to remain assigned and click **Save**.

Editing an Exemption by Assignment

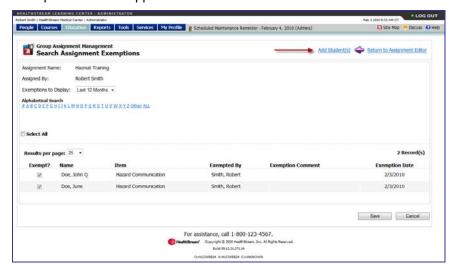
Exemptions can be edited for multiple students and multiple courses, equivalents, or curricula in a single assignment.

To edit an exemption by assignment

- 1. Perform a group assignment search. See *Searching for a Group Assignment* in this guide for details on conducting a group assignment search.
- 2. Click the name link of the desired group assignment. The **Edit Group Assignment** page appears.



3. Click **Assignment-Wide Exemptions**. The **Search Assignment Exemptions** page appears, and displays the assignment name, assignment creator name, course/equivalent/curriculum names and exemption search criteria (date range list and alphabetical search). In addition, a list of previously exempted students appears.



- 4. Do one of the following:
 - Click **Add Students** if you wish to exempt additional students (see *Creating an Exemption by Course, Equivalent, or Curriculum* in this guide).
 - Clear the check box to the left of students' names if you wish to remove the exemption for one or more courses, equivalents, or curricula.

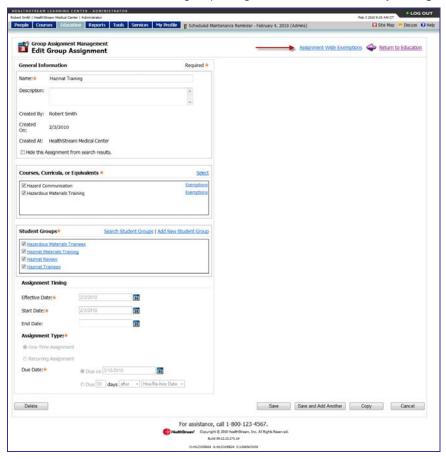
Note: If you wish to change a student's exemption date, you must delete the original exemption and then add the student and enter the new exemption date.

5. Click Save.

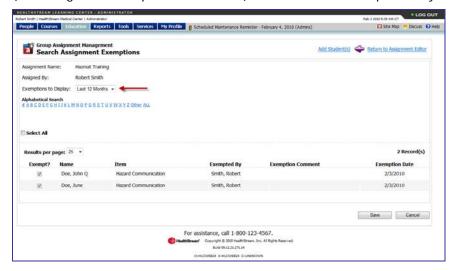
Searching for Exempted Students

To search for exempted students

- 1. Perform a group assignment search. See *Searching for a Group Assignment* in this document for details on conducting a group assignment search.
- 2. Click the name of the desired group assignment. The **Edit Group Assignment** page appears.



3. Click **Assignment-Wide Exemptions**. The **Search Assignment Exemptions** page appears, and displays the assignment name, assignment creator name, course name and exemption search criteria (date range list and alphabetical search). In addition, a list of previously exempted students appears.



- 4. In the **Exemption Date Range** box, select the date range for the exemption. Choices are **All Exemptions** or **Last 12 Months**.
- 5. Narrow your search by using alphabetical search (searches by last name). The page automatically refreshes once search criteria are determined to display search return of exempted students.

Individual Assignments

Individual assignments allow delivery of one or more assigned courses, equivalents, or curricula to a specific student within the HLC.

Adding an Individual Assignment

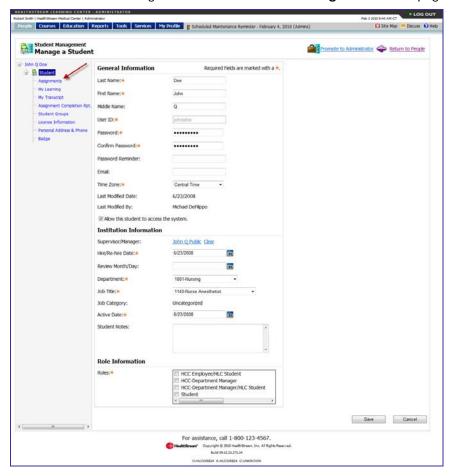
You can access the **Add a Student Assignment** page from the **People** tab or from the **Education** tab. Both methods are shown below.

Accessing the Add a Student Assignment page from the People tab

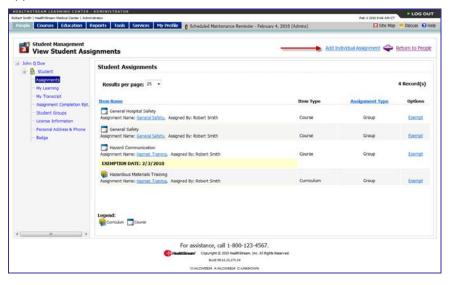
1. On the **People** tab, click **Manage Students**. The **Manage Students** page appears.



2. Perform a student search. See *Searching for a Student* in the *HLC Student Management* user guide for details on conducting a student search. The **Manage a Student** page appears.



3. Click **Assignments** from the left-hand navigation tree. The **View Student Assignments** page appears.



4. Click Add Individual Assignment. The Add a Student Assignment page appears.

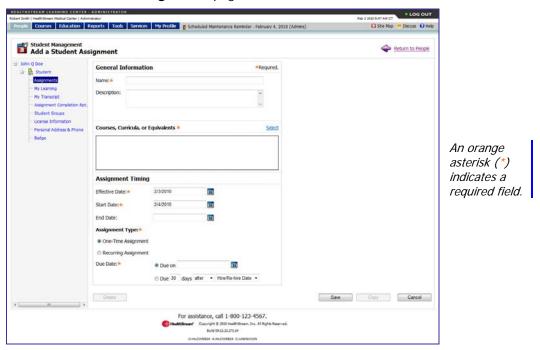
Accessing the Add a Student Assignment page from the Education tab

On the Education tab, click Add an Individual Assignment. The Select Student page appears.



Adding the Individual Assignment

The Add a Student Assignment page is show below.

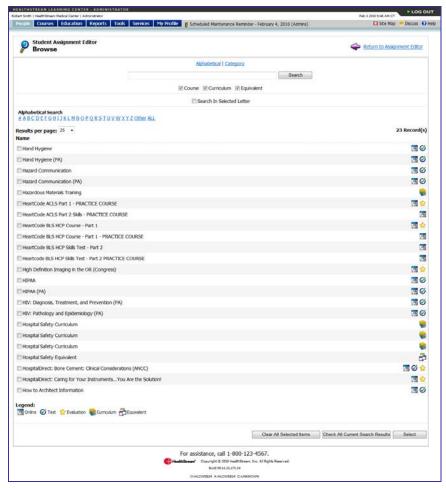


- 1. In the **Name** box, enter a name for the individual assignment.
- 2. In the **Description** box, enter a description of the assignment, if desired. The assignment description will appear on the Assigned Courses report.

3. Click **Select**. The **Browse** page appears with the **Course**, **Curriculum**, and **Equivalent** check boxes selected. Clear a check box to deselect that option.

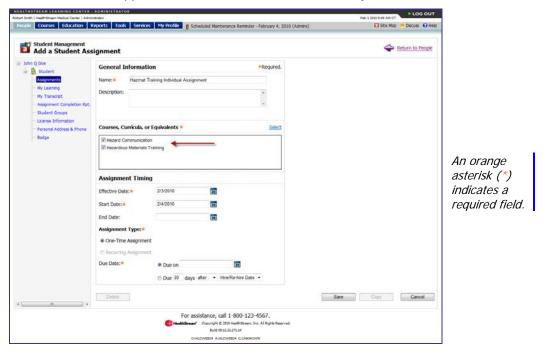


4. Perform a search. Search by title, keyword, alphabetically or by category. A list of all courses, equivalents, and curricula matching your search criteria appears.



5. Select the check box to the left of the desired course, equivalent, or curriculum name or click **Check All Current Search Results** to select all courses, equivalents, and curricula.

- 6. To add more courses, equivalents, or curricula, continue to search by keyword or browsing alphabetically or by category, even if the courses, equivalents, or curricula are found on separate pages. There is no need to repeat the search process.
- 7. Click **Select** to return to the individual assignment editor. The selected course, equivalent, and curriculum names appear in the **Courses, Curricula, or Equivalents** box.



- 8. Clear the check box to the left of the course, equivalent, or curriculum name to remove a course, equivalent, or curriculum that you previously selected, if desired.
- 9. In the Effective Date box, change the effective date, if desired. The effective date is the date on which the assignment begins, and the date from which the system begins looking for completions of the assigned learning items. The effective date defaults to today's date, but can be back-dated to accept prior completions to satisfy the assignment.

Tip: You can also click **11** to select the date.

Note: Each learning item within a curriculum includes an effective date that can be set to **X** number of days prior to enrollment in the course or equivalent within the curriculum (relative effective date). See *Adding a Curriculum* in the *HLC Curricula Management* user guide. Enrollment occurs when a student clicks the **Enroll** button for a course, equivalent, or equivalent course within the curriculum. Additionally, each learning item can be set to allow the assignment effective date (fixed effective date) to serve as the effective date for the learning item. If the assignment effective date option is used, the relative effective date (if added) will only apply if the curriculum is chosen as elective learning from the student **Catalog** tab.

10. In the **Start Date** box, change the start date, if desired. The start date is the date on which assigned courses, equivalents, and curricula will appear on the students' **My Learning** page. The start date defaults to tomorrow's date but can be changed to today's date or a date in the future. It cannot be set to a date in the past.

Tip: You can also click **11** to select the date.

11. In the **End Date** box, enter an end date, if desired. Once an assignment end date arrives, the assigned courses, equivalents, and curricula cannot be completed to satisfy the assignment and student is marked as **Delinquent** on assignment-related reports. Courses, equivalents, and curricula that have not been started will be removed from the **My Learning** page. In-progress courses, equivalents, and curricula will be moved to the **Elective Learning** area where they can be completed as an elective, or the student can un-enroll.

Tip: You can also click **11** to select the date.

12. Click **One-Time Assignment** or **Recurring Assignment** to indicate the assignment type.

Note: Equivalents and curricula can be included in one-time assignments only.

If you select **Recurring Assignment**, the page will refresh and additional recurring assignment options are displayed.

- Select a recurrence interval by entering a numeric value and selecting the desired interval from the list (for example, recurs every 2 years).
- If you select **Recurring Assignment based on Original Due Date**, then you may enter an optional grace period (in days) in the **Grace Period** box, if desired.
- The recurrence date defaults to 180 days but can be changed if desired. The recurrence date is the date on which the next assignment instance will appear on a student's **My Learning** page.
- 13. In the **Due Date** box, enter date on which the assignment is due. The due date can be either a fixed calendar date, or can be set to a date relative to each assigned student's hire/re-hire or review date.

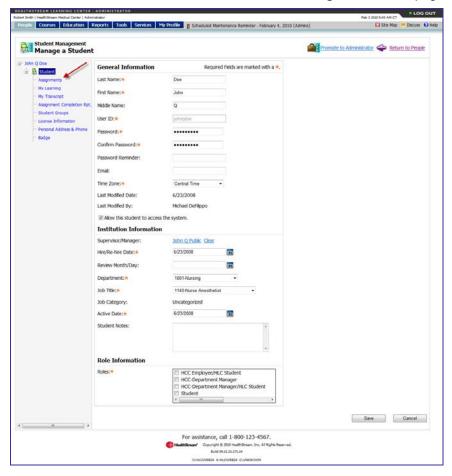
Tip: You can also click **11** to select the date.

14. Click Save.

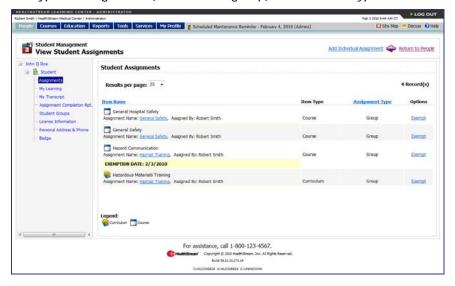
Searching for an Individual Assignment

To search for an individual assignment

- 1. Perform a student search. See *Searching for a Student* in the *HLC Student Management* user guide for details on conducting a student search.
- 2. Click the name link of the desired student. The **Manage a Student** page appears.



3. Click **Assignments** from the left-hand navigation tree. A listing of student assignments appears with the type of assignment (individual or group) noted in the *Type* column on the right-hand side.

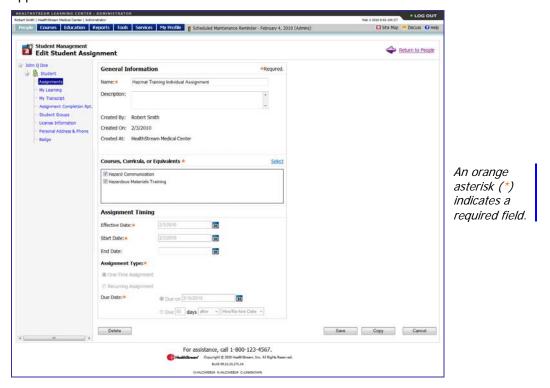


Editing an Individual Assignment

Carefully plan individual assignment edits with consideration of how edits may affect reports, student assignments, or student completions.

To edit an individual assignment

- 1. Perform an individual assignment search. See *Searching for an Individual Assignment* in this document for details on conducting an individual assignment search.
- 2. Click the name link of the desired individual assignment. The **Edit Student Assignment** page appears.



- 3. Make the desired edits, keeping the following in mind:
 - If you add a new course, equivalent, or curriculum to the individual assignment, the new course, equivalent, or curriculum will appear on the student's **My Learning** page.
 - If you remove a course, equivalent, or curriculum from the individual assignment, the course, equivalent, or curriculum will be removed from the **Assigned Learning** area of the student's **My Learning** page if the course, equivalent, or curriculum has not been started. If the course, equivalent, or curriculum has been started, it will drop to the **Elective Learning** area of the student's **My Learning** page where the student can complete the learning or un-enroll.
 - If you add additional student groups to the individual assignment, the students in the added student groups will see the assigned courses, equivalents, and curricula on their **My Learning** pages.

If you remove an assigned student group from the individual assignment, the students in the
removed group will have the assigned courses, equivalents, and curricula removed from the
Assigned Learning area of their My Learning pages if the course, equivalent, or curriculum
has not been started. Courses, equivalents, and curricula that have been started will drop to the
Elective Learning area of the My Learning page where students can complete the learning or
un-enroll.

Note: Assignment Timing (other than the **End Date**) and **Assignment Type** cannot be edited once the assignment start date has arrived.

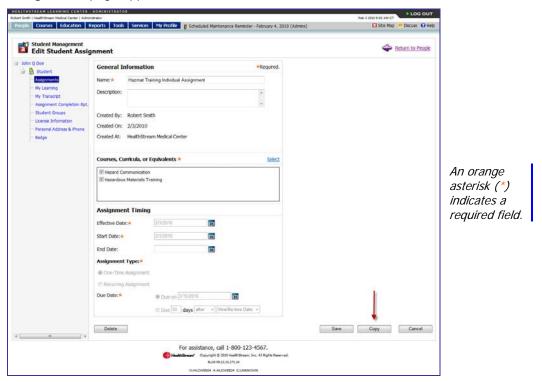
4. Click Save.

Copying an Individual Assignment

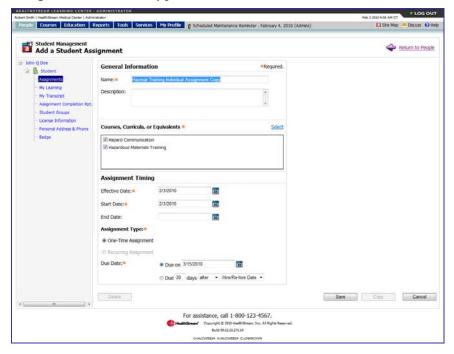
At times, you may wish to copy an individual assignment. This will allow you to make edits, while preserving original assignment data. This feature can also be used to as a short-cut for replicating prior assignments. You may also wish to copy an assignment if you need to edit assignment timing (which is not editable once the original assignment start date arrives).

To copy an individual assignment

- 1. Perform an individual assignment search. See *Searching for an Individual Assignment* in this document for details on conducting an individual assignment search.
- 2. Click the name link of the individual assignment that you want to edit. The **Edit Student Assignment** page appears.



3. Click **Copy** to create a copy of the original assignment. The copy will be named **[original assignment name] Copy**.



- 4. Make desired edits to the assignment copy.
- 5. Click Save.

Note: If the copy was created to replace an existing individual assignment, consider:

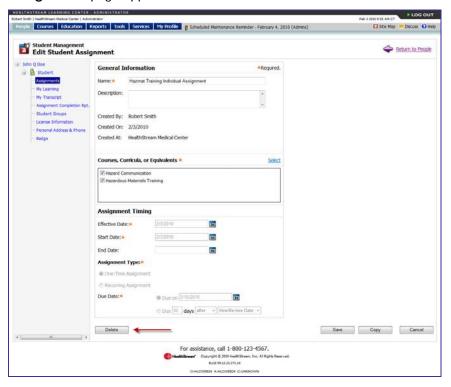
- Clicking **Delete** only if you know the student has not yet completed any of the assigned courses, equivalents, or curricula, or if you do not need to preserve assignment completion report data.
- Adding an **End Date** (today's date) to end the original assignment, but preserve all assignment-related completion data for reports.

Deleting an Individual Assignment

Note: Deleting an individual assignment removes assignment-related completion data for reports. Only delete an assignment if you know the student has not yet completed any of the assigned courses, equivalents, or curricula, or if you do not need to preserve assignment completion report data.

To delete an individual assignment

- 1. Perform an individual assignment search. See *Searching for an Individual Assignment* in this document for details on conducting an individual assignment search.
- 2. Click the name link of the individual assignment that you want to delete. The **Edit Student Assignment** page appears.



- 3. Click **Delete**. A confirmation prompt appears.
- 4. Click **OK** to delete the individual assignment.

Institution-specific Assignments

If your institution is part of a larger hierarchy, you can have a feature enabled that allows you to determine if an assigned course, equivalent, or curriculum can satisfy more than one institution's assignment for students who have been acquired by another institution. When enabled, you can specify that assigned courses, equivalents, or curricula must be completed for your institution specifically. Otherwise, the same course, equivalent, or curriculum completed at either institution will satisfy assignment requirements for both.

If courses, equivalents, or curricula are marked as institution-specific, the **Institution-specific Assigned Learning** area appears on the student's **My Learning** page. This area displays courses, equivalents, and curricula that must be completed at the other institution at which the student is active.

To designate an institution-specific assignment

- 1. Create a group assignment or individual assignment. See *Adding a Group Assignment* or *Adding an Individual Assignment* in this guide.
- 2. Prior to saving the assignment, select the check box to the right of each selected course, equivalent, or curriculum for which you want to require an institution-specific completion.
- 3. Click **Save**. Students receiving the assignment will now see the **Institution-specific Assigned Learning** area on their **My Learning** page, which will include all courses, equivalents, and curricula checked as required institution-specific completion.

Note: If a student completes a course, equivalent, or curriculum that satisfies more than one institution assignment (institution-specific completion was not required), the completion is recorded for both or all institutions and appears on completion reports for each. If a course, equivalent, or curriculum is marked **Institution-specific Completion Required**, a completion occurring at another institution will not satisfy the institution-specific requirement and will not appear on that institution's completion reports.