HealthStream

HealthStream Learning Center™ (HLC)

GETTING STARTED GUIDE

Recommended Practices for Launching your HLC eLearning Initiative

Updated June 2008

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WELCOME TO THE HLC!

We are delighted that you have chosen the HealthStream Learning Center™ (HLC) to support your organizational training and education efforts. Like other technology or software programs, the HLC requires careful planning and preparation to ensure the most efficient and effective use of the system.

The *Getting Started Guide* is designed to assist in facilitating a smooth roll-out of the HLC learning platform. The guide is divided into sections based upon HLC functionality, and includes recommended practices, questions to guide your organization's decision-making processes and checklists to track your progress.

Recommended practices are noted by the following icon:

Questions to consider are noted by the following icon:

Checklist sections are noted by the following icon:

In addition to reviewing the *Getting Started Guide*, we highly recommend that decisions made along the way are documented. In the event that administration of the HLC is shifted to another employee, the documentation will ensure seamless transition of administrator responsibilities.

Within the HLC, employees are referred to as *students*. The same holds true for the *Getting Started Guide*. HLC students are the employees.

Important Note:

The *Getting Started Guide* is meant to support your efforts *after* you have attended HLC New Administrator Training. Other information and actions that are required prior to training will be covered in the HLC Activation Workbook, and will be reviewed by your HealthStream Implementation Specialist.

GENERAL CONSIDERATIONS

It is important to determine who is on the HLC team and to identify all team members' roles and responsibilities. Typically one department (such as the Education Department) is responsible for the HLC. However, management of the system often becomes a shared responsibility by members from a variety of departments.

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Recommended Practices

The HLC team should include members from:
- Education, Training or Organization Development
- Human Resources
- Clinical Staff Development
- Information Systems
- Project Management
- Subject Matter Experts (e.g. Safety Officer, Epidemiology Nurse)
- Continuing Education Administrator

Identify a key or lead administrator. The lead administrator will serve as the key liaison to HealthStream. Be sure that all members of the HLC team know who the lead administrator is so that questions can be appropriately directed. More than one lead administrator may be required.

Identify an executive sponsor. Elicit the support of one or more members of the executive team to help emphasize the importance of the HLC initiative and to assist in moving the project forward. Consider creating a course that includes a recorded message from the executive sponsor and assign that course to all students.

Conduct an organizational readiness assessment. Assessment items include:
- Computer skill level of employees
- Availability of basic computer training
- Computer availability for HLC access
- Location of computers and printers
- Availability of headsets for student PCs
- Provision of technical support for students

Organize regularly-scheduled team meetings to track progress and prepare for HLC launch. Regular meetings will keep the project moving forward toward the launch goal.

Document all key decisions. Archiving information around key decisions provides historical context for future administrators.

Establish a mechanism for communicating HLC-related information to students, managers, other administrators and the executive team. Ongoing communication is one of the most important keys to a successful launch.

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Develop an internal marketing strategy. Find HLC champions within each department to assist in creating a "buzz" around the new platform. Distribute posters, fliers and other tools to increase awareness. Sponsor a naming contest for your new e-learning initiative. Develop contests to include rewards and recognition for departments that demonstrate improved or 100% training compliance using the HLC. Set up a workstation or kiosk in a high-traffic area (such as the cafeteria) to provide on-the-fly assistance and demonstration for new users.

Start with a pilot program. Select a few departments (especially ones with supportive staff and management) to pilot the e-learning platform. For larger organizations with multiple facilities, consider a single-facility pilot or a phased rollout plan. Focus on planning, implementation and evaluation, and make adjustments as needed before including other affiliations.

Questions to Consider

1. Who will participate on the team?
2. Who will be the team leader(s) for the HLC launch?
3. Who will be the executive sponsor?
4. How will student computer skills be assessed?
5. How will hardware needs be determined and by whom?
6. What are the best locations for hardware?
7. Will headsets be provided for student use?
8. When will the team meet?
9. How will decisions be documented and archived?
10. How will HLC-related information be communicated?
11. How will the initiative be marketed internally?
12. How will the pilot program be designed?

General Considerations Checklist

☐ Designate team leader(s).
☐ Identify an executive sponsor.
☐ Identify team members.
☐ Assess student computer skills.
☐ Assess hardware availability.
☐ Determine hardware locations.
☐ Decide if headsets will be provided.
☐ Determine a team meeting schedule.
☐ Develop a plan for documenting HLC decisions.
☐ Draft an internal communications plan.
☐ Develop an internal marketing plan.
☐ Establish a pilot program.
☐ Other:

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ADMINISTRATOR MANAGEMENT

There are several administrator roles available by default within the HLC. During initial rollout, administrators must be designated, and ongoing administrator management will be required.

Recommended Practices

Key administrators should attend live training with a HealthStream trainer. A qualified instructor will guide trainees through three days of experiential learning, including individual and group exercises, comprehensive review and hands-on application.

During training, the different administrator roles available within the HLC will be introduced, including the access rights available for each. Key administrators will receive instruction for granting administrator access to others to assist with HLC management.

Key administrators should review the descriptions of all available administrator roles (access and privileges) to determine what administrator designations will be needed within the organization. In addition to the review of administrator roles highlighted during training, a document describing each role is available in the HLC Knowledge Center under Training Resources.

Limit administrator access during initial rollout. Roles may be expanded as administrator competency is validated. While key administrators are trained by HealthStream, training of additional administrators will be your responsibility. Consider a tiered rollout of new administrators, as key administrators become more comfortable with the HLC.

Administrators, especially those with full access to HLC features, should communicate regularly to discuss platform use, delegate responsibilities and address questions or concerns. This will reduce the likelihood of duplication of effort or accidentally undoing/re-doing another administrator's work.

Always use the *Promote to Administrator* feature when adding an administrator role to a current employee. Using this feature will allow new administrators to gain administrator access using their student User ID and password.

Draft a policy to ensure that terminated administrators are deleted from the HLC. Consider adding this step to the current information systems check list for disabling employee access to all internal systems. Remember – inactivating a student does not automatically delete administrator access.

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Administrators who may serve as instructors for a classroom learning activity should enter their credentials and biographical information in the Instructor Resume screen of the administrator login. This is particularly important if the HLC continuing education (CE) credit management functionality is used. Credentials and biographical information will be accessible to students from the Class Details screen prior to the classroom event. By default, administrators can add their own instructor resume information. Higher level administrators can also enter this information for other administrators.

If you wish to add outside (non-employee) administrators as instructors, but do not want them to access your organization's HLC, do not communicate the associated User ID or password to the administrator. The administrator/instructor resume information can be entered so that biographical and credentials information appears for students.

Consider the following recommended qualifications for HLC administrators:
- Possess basic computer skills, including an understanding of Windows
- Ability to use a mouse and keyboard
- Prior experience using Internet-based applications
- Microsoft Word proficiency
- Typing proficiency is recommended, but not required
- Ability to analyze report data
- Excellent customer service skills
- Education background is a plus

Consider the following recommended qualifications for HLC administrators with authoring administrator access:
- Possess basic computer skills, including understanding of Windows
- Ability to use a mouse and keyboard
- Proficient in Microsoft Office programs including Word, Excel and PowerPoint
- Experience utilizing image editing software
- Experience with Adobe Contribute or other authoring tools a plus

Utilize the following reports to plan and manage administrators:
- Role Features
- Role Utilization
- Instructor Resume
- Instructor Class Schedule

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❓ Questions to Consider

1. Will additional administrators be required?
2. If yes, who will be designated as an administrator, and to what administrator role(s)?
3. Who will be responsible for training other administrators?
4. What will be the target timeframe for training other administrators?
5. How will administrators be deleted?
6. Will administrator/instructors enter their own resume information?
7. Will administrators be required to enter their business addresses?

☑ Administrator Management Checklist

- ☐ Review available administrator roles.
- ☐ Determine additional administrator needs.
- ☐ Develop a plan for training additional administrators.
- ☐ Establish a communication mechanism for administrators.
- ☐ Draft a policy outlining how/when administrators will be deleted.
- ☐ Determine who will enter instructor resume information.
- ☐ Decide if administrator business address entry will be required.
- ☐ Other:

INSTITUTION MANAGEMENT

The institution and/or enterprise (if a multi-level facility) may require ongoing management to ensure that student demographic information is accurate and up-to-date.

Recommended Practices

Identify an administrator who will be responsible for the overall management of the institution (or enterprise). This responsibility includes mapping new job titles to job categories and checking the Student Import Results report after each data import file is submitted.

Utilize the following reports when managing the institution:

- Student Import Results
- Department Listing
- Department Utilization
- Job Title Listing
- Job Title Utilization
- Organizational Hierarchy (if applicable)

Questions to Consider

1. Who will be responsible for overall institution or enterprise management?
2. Who will be responsible for reviewing the Student Import Results report on a regular basis?

Institution Management Checklist

- ☐ Designate the administrator with overall institution or enterprise responsibility.
- ☐ Determine who will be responsible for reviewing the Student Import Results report.
- ☐ Other:

STUDENT PREPARATION AND MANAGEMENT

Students must be prepared to utilize the HLC for delivery and tracking of their training and education. They must receive instruction on how to access the system, and how to complete assigned and, if available, elective courses. Students must also learn to troubleshoot, and know how to reach technical support if needed. They should also be advised of policies related to mandatory course completions.

Off-site Access to the HLC

Often, new HLC customers have questions about student access rules, regulations and policies. Off-site access to the HLC is dependent upon several factors, including the availability of Internet access, connection speed or bandwidth, and compatibility with HLC technical requirements. It is also important to consider human resource implications of time away from work being used to complete courses.

Recommended Practices

Consult a member of the human resources staff (if not already part of the team) when determining your organization's off-site access policy. You may also wish to include the compliance and/or legal departments in making this decision.

Develop a plan for training students on how to use the HLC. Engage administrators and department managers in this effort. Begin with the identified pilot group, and train students just prior to their departments or institutions going live on the system.

Incorporate a HealthStream Overview into new employee orientation. Introducing the HLC as part of the new hire process will position the HLC as a part of the organization's learning culture and will encourage use of the tool.

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Establish and communicate expectations for student course completions.
Initial HLC training for students should include expectations for assigned course
completion. Students should be encouraged to log into the HLC at regular intervals, and
to pay particular attention to assigned course due dates and upcoming class dates.
Develop and communicate policies related to compliance with mandatory training, and
determine if compliance will be tied to performance reviews.

Outline a procedure for providing technical support for students. Students
will be directed to internal support services if they experience problems when working
in the HLC. Designate a support team or identify an individual to whom all student
questions will be referred. Communicate how students are to contact technical support
(e.g. email, phone) and the expected response time. Consider how support will be
provided on weekends, evenings and during night-shifts.

**Consider how the learning needs of students who cannot utilize a
computer will be met.** Consider implications for employees with disabilities. Also
consider any language barriers that may exist for employees who do not speak English.

**Review the HealthStream course catalog to find additional courseware to
meet the learning needs of students.** The course catalog can be accessed directly
through the HLC by clicking the Course Library link on the Services tab of the
administrator login.

**Determine which courses will be offered by assignment only, or as
assignable or elective.** Elective courses can be searched by students from the Catalog
tab and are available for self-enrollment.

**Students must enter their license and discipline information in the HLC if
they wish to receive CE credit for continuing education courses.** If no license
and discipline information is stored in the HLC, the student will receive the course
completion but no associated CE credit.

Draft a policy to ensure that terminated students are inactivated.
Consider adding this step to the current information systems checklist for disabling
employee access to all internal systems.

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Utilize the following reports to manage students:
- Discipline Listing
- Expiring License
- Group Transcript
- Student Listing
- Student Transcript

When creating a Group Transcript report, check the *Include Page Breaks* checkbox to print transcripts for multiple students. This will ensure that each student's transcript begins on a separate page. Left un-checked, the transcripts will appear (and be printed) as a single, ongoing page.

Questions to Consider

1. Will off-site access to the HLC be sanctioned for employees? If yes:
    a. Will employees be paid for time spent completing courses?
    b. How will pay be determined?
    c. Will different rules apply for assigned vs. elective courses?
    d. Will policies be different for hourly vs. salaried employees?
    e. How will technical support be provided for off-site access?
2. What policies will be needed regarding student completion of mandatory coursework?
3. How will students access technical support for the HLC?
4. How will students with disabilities be accommodated? What about students with language barriers?
5. What additional courseware will be needed to meet students' learning needs?
6. What courses will be assignable only? What courses may be elective?
7. Will students have access to CE courses?
8. How will terminated students be made inactive in the HLC?

Student Preparation and Management Checklist

☐ Draft an off-site access policy.
☐ Draft a policy for completion of mandatory education.
☐ Determine the consequences for non-compliance.
☐ Communicate policies with students.
☐ Determine how technical support will be provided for students using the HLC.
☐ Plan a training strategy for students with special needs.
☐ Review the HealthStream course catalog.
☐ Determine which courses will be assignable only vs. assignable and elective.
☐ Determine if CE courses will be offered.
☐ Encourage students to enter license information in the HLC.
☐ Draft a policy for inactivating terminated students.
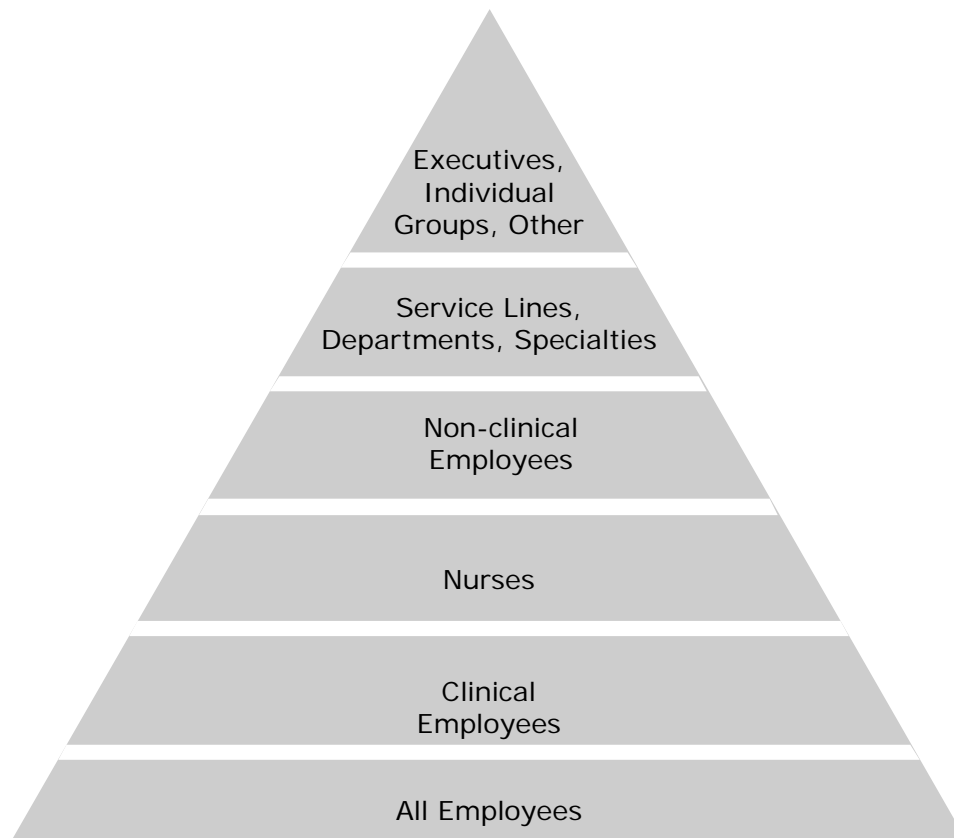☐ Other:

STUDENT GROUP MANAGEMENT

Student groups are designed as a way to efficiently create student assignments and run reports. Profile student group functionality allows student groups to be created based upon specified student criteria (such as department and job title) and will auto-populate with all students who meet all of the criteria for the group.

Recommended Practices

Profile student groups should be created by considering who the target populations will be for specific training/education. To create student groups within the HLC, consider the following:

- What is the largest target audience to which training/education will be assigned? Most often, this is the entire organization, or *All* students.
- What is the next largest target audience? This may be *All Clinical* employees, for example.

Use the triangle graphic below to assist in determining which profile student groups will be needed for the organization. Each *layer* of the triangle represents a student group or groups that will be needed. NOTE: This is a sample depiction. The organization may require more or different student groups to meet the educational needs.

Executives, Individual Groups, Other

Service Lines, Departments, Specialties

Non-clinical Employees

Nurses

Clinical Employees

All Employees

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Often, new employees require initial education and training that must be completed within a defined time period from the date of hire. Also, the education needs of a new employee may differ from the needs of incumbent employees. Profile student groups can be used to separate new from incumbent employees in the system for purposes of creating routine assignments.

⊙**Use profile student groups to create new hire assignments that will automatically be delivered to new employees (e.g. orientation courses).**
1. Create a profile student group called New Hire Student Group. The student group should include ALL departments, ALL job titles and ALL job categories.
2. Using the Hire/Re-hire Date range criterion, add a Hire Date *From* date of today's date, or the date from which you wish all new hires to be included. For example, if the Hire Date *From* is designated as January 1, 2008, only those employees with a hire/re-hire date of January 1, 2008 or after will receive assignments made to this student group.
3. Add a Hire Date *Through* range if you wish to have a New Hire Student Group for each year. You may leave the *Through* date empty if you wish that the student group continually auto-populate, beyond a calendar year.
4. Create a group assignment called New Hire Assignment.
5. Select the courses you wish to include in the assignment.
6. Select only the New Hire Student Group to receive the assignment.
7. BE SURE to make the assignment a One-time Assignment.
8. Give the assignment a relative due date of X number of days after the hire/re-hire date.

Using the method described above, all new employees with a hire/re-hire date on or after the profile student group criterion Hire Date *From* will be added to the student group. And, once added to the student group, each new employee will automatically receive the one-time new hire assignment that will be due X days after the employee hire/re-hire date.

NOTE: This same methodology can be applied to other student groups. For example, a New Hire – Clinical student group can be created using the same Hire Date *Through* criterion, and also adding specific clinical job categories (as opposed to ALL job categories).

⊙**Use profile student groups to create annual assignments for incumbent employees without including newly-hired employees.** When creating student groups for incumbent employees, again use hire/re-hire date as a group criterion, leaving the *From* date empty, and making the *Through* date one day less than the *From* date for the corresponding New Hire group. This will prevent incumbent assignments from being given to new employees.

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Use individual student groups when certain students do not share any common criteria other than their need to complete the same courses.
For example:
- The institution has a cross-functional patient education team for its oncology service line.
- Members include nurses, pharmacists, social workers, counselors and others.
- Each member of the team must, by policy, complete certain coursework (such topics as Pain Management, End-of-Life Care, Family Support, etc.) to serve on the team.
- Create an individual student group that includes each member of the team, and then create education assignments specifically for that team.

Use the *Hide Student Group* feature to remove unused student groups from the routine search return. Hiding a student group does not remove the student group from the system. It merely places it into the hidden category so does not appear on routine student group search (the default search setting is *Active*). Hidden student groups can always be retrieved by changing the search setting from *Active* to *Hidden* or *Both Active and Hidden.*

Utilize the following report to manage student groups:
- Student Group

Questions to Consider
1. What profile student groups will need to be created?
2. What individual student groups will need to be created?
3. Who will be responsible for managing/updating student groups?

Student Group Management Checklist
- ☐ Create initial profile student groups.
- ☐ Create initial individual student groups.
- ☐ Create profile student groups for new employees.
- ☐ Create enterprise student groups, if applicable.
- ☐ Determine who will be responsible for managing student groups.
- ☐ Other:

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HEALTHSTREAM REGULATORY COURSES

If the initial rollout planning includes assigning HealthStream regulatory courses to your students, first determine which regulatory courses from the library will be used.

Regulatory courses can be customized using the HLC Annotations functionality. See Regulatory Course Annotations.

Regulatory courses are reviewed and updated periodically. When a new version of a regulatory course becomes available, the version should be reviewed and published to the HLC. See Regulatory Course Updates.

Recommended Practices

Engage internal subject matter experts (SMEs) to review regulatory course content to determine which titles will be assigned. Content may be reviewed off-line by using the regulatory course storyboards. The regulatory course storyboards are PDF documents found in the online Help system. The documents outline the course content, including text and images, for each regulatory course.

To review course content alone (without slide layout or images) consider opening the online content from the student login and print from the Course Map feature. Using the course map, print each page or print an entire chapter as a scrolling page (rather than one page per slide).

Determine which courses will be assigned to each audience. For example, determine which course assignments go to all employees, all clinical employees, all non-clinical employees, all nurses, etc.

Consider assigning non-pre-assessment (non-PA) regulatory courses to new employees and pre-assessment (PA) regulatory courses to incumbent employees. This will ensure that all new employees are presented with the course content the first time they complete the course.

Multi-facility enterprises should consider assigning the same regulatory courses to all employees, making the assignments from the top (i.e. enterprise) level of the organization. If a course requires customization for each facility, consider using the Authoring Center to add facility-specific pages at the end of the course. This will allow students who work at more than one facility to complete the regulatory course only once, but still receive all site-specific information.

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Utilize the following report to manage HealthStream regulatory courses:

- Expiring Courses

Questions to Consider

1. Who will review regulatory course content?
2. Which courses will be assigned to each internal audience?
3. When will PA vs. non-PA courses be used?
4. How will enterprise-wide course assignments be made (if applicable)?

HealthStream Regulatory Courses Checklist

☐ Identify SMEs for regulatory course content review.
☐ Determine course assignments for each internal audience.
☐ Decide when PA and non-PA courses will be assigned.
☐ Draft a policy for creating enterprise-wide assignments (if applicable).
☐ Other:

REGULATORY COURSE ANNOTATIONS

Administrators can customize HealthStream regulatory course content by using the Annotations tool within the HLC. Additional information recommended by SMEs can be incorporated into the course as an annotation that will appear on a designated course screen.

Recommended Practices

Review the regulatory course storyboards to plan course annotations. The regulatory course storyboards can be found in the HLC online Help system under Administrator References. The storyboards display course content (text and images) as it appears for students taking the course. Print the storyboards, and write annotations text on the printed sheet of the screen to annotate. Include the target audience for each proposed annotation (i.e. the entire institution, specific departments or specific job categories). Once annotations have been determined and the audiences identified, enter the HLC and use the *Add an Annotation* functionality to create the annotations.

Draft a policy to specify an annotations review cycle. Annotations should be reviewed regularly and updated as needed to ensure their ongoing accuracy. A tool to assist with the review process is the Annotations Report, which displays the course name and detailed information (including text) for each annotation within the course.

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Export annotations from an existing HealthStream regulatory course version *prior* to publishing an updated version of the course. This process will allow you to electronically re-import annotations from one course version to the next, so that annotations do not have to be recreated from scratch.

If an annotation, including critical content, is added to a PA course, consider editing the PA exam to include a mandatory test question that covers the critical content. That will ensure that students are exposed to the information, whether or not they complete the online content. Remember, students who pass a PA exam are not required to view the PA course content.

Use the following report to manage annotations:
- Annotations

Questions to Consider

1. Who will create annotation text?
2. Who will be responsible for adding course annotations to the system?
3. How often will annotations be reviewed and, if needed, updated?
4. Who will be responsible for annotations review/updates?
5. Who will be responsible for exporting/importing annotations when a new version of a regulatory course is to be published?

Annotations Management Checklist

☐ Determine who will be responsible for creating and managing annotations.
☐ Draft an annotations review policy.
☐ Develop a plan for annotations export/import.
☐ Other:

REGULATORY COURSE UPDATES

HealthStream regulatory courses are reviewed and updated on a regular basis. It is your responsibility to determine if an updated version of a regulatory course is published, when the update becomes available.

Recommended Practices

Engage internal SMEs to review the storyboards for updated HealthStream regulatory courses. Note: Storyboards are available within the online Help system one month prior to the availability of an updated course.

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Determine who is responsible for publishing updated regulatory course versions (and at what level, if appropriate). Instructions for publishing updating regulatory course versions can be found in the online Help system.

Export annotations from the current course version prior to publishing an updated version. Exported annotations can then be imported into the new course version, rather than having to be recreated.

Utilize the following when publishing updated HealthStream regulatory versions:
- Annotations report
- Regulatory course storyboards

Questions to Consider
1. Who are your internal SMEs?
2. Who will be responsible for publishing updated regulatory course versions?
3. Who will be responsible for exporting and importing annotations?

Regulatory Course Updates Checklist
- [ ] Identify internal SMEs for regulatory course review.
- [ ] Determine who will be responsible for publishing regulatory course versions.
- [ ] Determine who will be responsible for exporting and importing annotations.
- [ ] Other:

HLC ASSIGNMENTS
The HLC provides a powerful and efficient tool for delivering course assignments.

Recommended Practices

Plan course assignments carefully. Consider what content is appropriate and/or required for each target audience. Similar to student groups, the triangle depiction may be helpful to plot out assignments.

Establish an assignment naming convention that is standardized across the facility, and allows for easy assignment searching. Consider including the following:
- Date of assignment creation
- Target audience
- Theme or content category

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⏱ **Use the following template when creating assignments:**

	Assignment name
	Courses to be included
	Target audiences
	Effective date
	Start date
	If one-time assignment: o Relative or fixed due date? o End date?

	If recurring:
	  o Based on original due date or previous completion date?
	  o Recurrence date?
	  o Grace period (if based on original due date)?
	  o Relative or fixed due date?
	  o End date?

	Exemptions:
	  o By student
	  o By course
	  o By assignment

⏱ **Consider that all courses within an assignment will share the same initial due date.** Consider adding more than one assignment if courses do not need to be due at the same time.

⏱ **Back-date the effective date to credit students for prior course completion of courses that are being included in the assignment.**

⏱ **When creating recurring assignments, limit the timeframe in which upcoming due dates will be displayed on the student's My Courses screen.** Course assignments that appear months in advance of the due date have less impact on students than assignments that appear with a shorter period of time to complete. In the case of recurring assignments based on previous completion date, if the recurrence date is excessively long, students may complete courses multiple times for each assignment instance.

⏱ **Determine when PA courses will be assigned and when non-PA courses will be utilized.** When requiring all new employees to complete the non-PA versions initially, do not assign both the PA and the non-PA version of a course topic to the same student.

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Never delete an assignment if assignment-related report data must be preserved.

Determine how much time new employees will have to complete initial assignments. Using the relative due date, based upon hire/re-hire date, will allow you to set up new hire assignments for completion within a specific timeframe (e.g. 30 days after the hire/re-hire date).

If using grace periods, determine if this information will be communicated to students and how. There is no onscreen prompt that indicates to students when/if a grace period is being used. Determine the grace period policy, if applicable, and communicate this information to students.

Develop internal policies to address students who are past due and/or delinquent for assigned courses. See Student Preparation and Management.

Use the *Hide Assignment* feature to remove completed or ended assignments from routine assignment search. The default setting for assignment search is *Visible*. However, hidden assignments can always be searched for, retrieved, and changed from *hidden* to *visible.*

Utilize the following reports for assignment management:
- Enterprise Assignment Completion (if applicable)
- Student Assignment Completion
- Assignment Completion Drill-through
- Assignment Completion Schedulable
- Delinquency/Past Due Drill-through
- Delinquency/Past Due Schedulable

Questions to Consider
1. What will the assignment naming convention include?
2. How long will new employees have to complete initial assignments?
3. How will grace periods (if used) be communicated?
4. When will one-time assignments vs. recurring assignments be used?

Assignments Checklist
- ☐ Determine the assignment naming convention.
- ☐ Establish policies for completion times, due dates, grace periods etc.
- ☐ Communicate grace period information, if applicable.
- ☐ Other:

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ASSIGNMENT-RELATED REPORTS

To track student completion for courses that have been assigned (i.e. have a specified due date) use Assignment reports.

Recommended Practices

Understand the meaning of various completion statuses:
- Not Yet Due – the assignment due date has not yet arrived.
- Completed on Time – the assigned course was completed prior to the due date.
- Completed Late – the assigned course was completed, but after the due date had passed.
- Past Due – the due date has passed, but the student has not yet completed the assigned course.
- Delinquent – the due date and any associated grace period have passed and the course was not completed.

When seeking information about course completions only, use the Course Completion reports. When seeking information about course completions *as they relate to assignments,* use the Assignment Completion or Delinquency/Past Due reports.

Determine who will be responsible for running and analyzing assignment reports. This may be delegated to the department, facility or if appropriate, enterprise level, depending on the courses being assigned and the scope of the initiative. Identify a team to formally review and analyze report results to assess compliance for large and/or mandatory training efforts.

Determine how report data will be routed and shared within the organization. Provide key individuals with the *Reporter* administrator role. Add key recipients to the email distribution list for scheduled reports, or PDF and send pertinent reports via email attachment.

Establish expectations for student completion. Be sure students know the organization's policy regarding completion of mandatory training, and the consequences for non-compliance.

Questions to Consider

1. Who will be responsible for running and analyzing assignment-related reports?
2. What key stakeholders will require access to report data?
3. Who will enforce the course completion policy?
4. Which reports will be scheduled for auto-generation?

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☑ Assignment-related Reports Checklist

- ☐ Designate those responsible for report generation and analysis.
- ☐ Conduct training for those responsible for reports.
- ☐ Determine who will be responsible for enforcing the course completion policy.
- ☐ Other:

HLC LEARNING EVENTS

Use learning events to capture information about courses that students completed outside the HLC, and add those course completions to the student transcript.

Recommended Practices

For a learning event to appear on course reports, first create a course that corresponds with the learning event. When the learning event is entered, indicate that completion of the learning event satisfies the corresponding course.

Develop a policy that outlines what types of learning events will be entered into the HLC. It is also important to outline the criteria for determining if/when a learning event will satisfy an HLC course.

Questions to Consider

1. Who will determine if a learning event satisfies an HLC course?
2. Who will be responsible for entering learning events into the HLC?

☑ HLC Learning Events Checklist

- ☐ Draft a policy that outlines learning events that satisfy an HLC course.
- ☐ Determine what types of outside learning events will be entered into the HLC.
- ☐ Determine who will be responsible for entering learning events.
- ☐ Other:

HOSPITALDIRECT®

HospitalDirect® allows access to additional courseware, including continuing education courses and product training, for assignment or elective enrollment. HospitalDirect® can be enabled for your organization.

Recommended Practices

Engage SMEs to review the HospitalDirect® clinical content offerings.

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⊙**If you choose not to accept a specific HospitalDirect® offering, leave the offering status *Pending*.** By marking an offering status as *Declined,* the offer is permanently removed from the HospitalDirect® course listing and may not be accepted at a later date. Offers marked *Pending* are not available for assignment and will not appear as elective courses on the students' HospitalDirect® tab. Only those marked *Accepted* can be used in the HLC.

❓ Questions to Consider

1. Who will review HospitalDirect® offerings?
2. Who will manage activation of selected HospitalDirect® courses?

☑ HospitalDirect® Checklist

☐ Identify internal SMEs to review HospitalDirect® courses.
☐ Determine who will manage HospitalDirect®.
☐ Other:

ADMINISTRATOR-DEVELOPED HLC COURSES

The HLC allows administrators with access to course-building functionality the ability to develop their own courses for delivery and management through the HLC. Courses can include one or more of the following types of learning activities:

- Tests
- Evaluations
- Classroom activities
- Online activities

Recommended Practices

⊙**Establish a naming convention for administrator-developed courses.** A standard naming convention will allow for more efficient searching.

⊙**Add a detailed description of the course.** The description provides students with additional information prior to taking the course, and may meet an accreditation requirement if the course offers CE credit.

⊙**Place a colon, period or other punctuation mark at the end of each stated learning objective.** Learning objectives render in a sentence format on the Course Overview screen. Adding a punctuation mark at the end of each objective will aid students in reviewing each objective.

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⊙**Consult with your medical librarian to establish a plan for course categories.** Course categorization provides another course search tool. A well-established and standardized course category system will aid both administrators and students in finding courses.

⊙**Communicate the course category standard to all administrators who will be creating courses in the HLC.** This communication will ensure that all administrators are utilizing the same methodology when selecting categories to which courses will be mapped.

⊙**Choose either the HealthStream default or your own non-CE default certificate template as the course default certificate.** The certificate chosen as the default certificate is the one that all students, regardless of licensure status, will receive for course completion. If a course offers CE credit, students qualifying for that credit will receive an additional, CE-specific certificate, for course completion.

⊙**Require sequential completion of learning activities if the course includes a pre-test, post-test, evaluation, or if the activities be completed in a specified order.** Uncheck this box if you wish to allow learning activities to be completed in random order.

⊙**DO NOT enter a course fee into the Course Fee field unless the organization has a Pay Pal/VeriSign account with HealthStream.** If a course includes a course fee, students will be asked to enter credit card information before they can access the course. To include course fees but manage those transactions outside the HLC, consider communicating course fees within the Course Description field.

⊙**Enter an inactivation date in the Inactivation Date field to make the course to appear on the Expiring Courses report.** If an inactivation date is entered, students will see an on-screen notice when the course is about to expire. Expired courses cannot be completed and cannot be assigned.

⊙**Enter as many keywords as needed to improve search functionality.** Consider the words that administrators and students may use. Keywords can be added with comma separation.

⊙**Use the *Most Recently Edited* icon (to the right of Manage Courses) for quick access to the 10 most recently edited courses.**

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Establish a policy for course review cycles. A review date can be added to the Review Date field on the Course Properties screen. Be advised that this is for informational purposes and does not trigger an action in the system.

Enter building and resource information into the HLC prior to creating a course. Buildings and resources are necessary for classroom learning activities.

Enter CE credit management information into the HLC prior to creating a course for which CE credit may be given. For additional information, see CE Credit Management.

Utilize the following reports for administrator-developed courses:
- Course Development Status
- Expiring Courses
- Training Hours

Questions to Consider

1. Who will have permission to create courses?
2. How will the subject matter expertise be enlisted?
3. What instructional design resources will be available?
4. What will the course naming standard be?
5. How will the course categories be set up?
6. Will a custom default (non-CE) certificate template be created?
7. Will a Pay Pal/VeriSign account be needed?
8. Will inactivation dates for our courses be included?
9. How will copyright permissions be documented, if applicable?
10. Who will give final approval for developed courses?
11. How will periodic course review be facilitated?

Administrator-developed HLC Courses Checklist

☐ Determine who will have course creation/editing access.
☐ Establish a course naming convention.
☐ Establish a course description template.
☐ Determine standards for course learning objectives.
☐ Outline a course category system.
☐ Create a default (non-CE) certificate template, if desired.
☐ Establish a Pay Pal/VeriSign account with HealthStream, if needed.
☐ Determine when review and/or inactivation dates will be added to courses.
☐ Draft a course review policy.
☐ Draft a policy for documenting copyright permissions, if applicable.
☐ Establish a course approval process.
☐ Other:

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BUILDING AND RESOURCE MANAGEMENT

Buildings and building resource information must be entered into the HLC if administrator-developed courses include classroom activities.

Recommended Practices

Add only broad categories for Building Resource Types. Examples include:
- Rooms
- AV equipment
- Computer equipment

Be specific when naming a building. Specific names will assist students in identifying the exact location. This is especially important for enterprise organizations with multiple facilities.

Add a map URL for buildings, especially when the organization includes multiple buildings or multiple campuses. Be aware that some firewalls may block student access to Internet map services.

Add the building name to the room name, especially if more than one building has rooms with the same or similar names. For example, if more than one building has a Skills Lab, add the building name as a prefix to the room name.

Use the *Location* field to type in specific directions to the classroom location. This is particularly helpful for attendees from other buildings or campuses. Consider entering directions to the parking lot, and then from the parking lot to the exact room location.

Utilize the following reports to manage buildings and resources:
- Daily Equipment Schedule
- Daily Room Schedule

Questions to Consider

1. What building resource types will need to be added?
2. What buildings and rooms or resources will need to be added?
3. What map service will need to be used for map URLs?
4. Who will be responsible for adding resource types, rooms and resources?

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☑ Building and Resource Management Checklist

- ☐ List all building resource types.
- ☐ List all buildings.
- ☐ Identify all classrooms associated with each building.
- ☐ Identify all resources associated with each building.
- ☐ Determine if map URLs will work within your facilities (if needed).
- ☐ Establish a standard for adding room directions.
- ☐ Determine who will add and manage buildings, rooms and resources.
- ☐ Other:

COURSE LEARNING ACTIVITIES

Any number of learning activities can be added to an administrator-developed HLC course. Each learning activity requires a Common Properties screen be completed.

Recommended Practices

Re-name the default name of each learning activity to be more specific to the course. Re-naming the learning activities will assist in finding the activities when searching other HLC features (e.g. adding a class, running a test question analysis report).

Carefully consider completion mode for each learning activity. Remember, a course with a single learning activity that is marked *Not Required* will be completed as soon as the student clicks on the course name.

You must enter an estimated completion time in hours and minutes. If you do not wish to include estimated completion times, you must place zeros in the hours and minutes fields.

If using estimated completion times, use them for all learning activities within the course. If estimations for all learning activities are not included, the final estimated time (appearing on the student transcript) will be inaccurate. Estimated Completion Times reflect the sum of the estimations for each learning activity that the student completed within the course.

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🔴**Create a pre-assessment (PA) course by using the following Common Properties settings:**
- Completion mode: Required
- Minimum passing score: Enter the desired minimum score percent
- Check the *Meeting minimum passing score will immediately pass the course* checkbox.

🔴**Add a Score Percent Weight to each scored learning activity (tests or classroom activities) for the system to generate an overall course score.** Remember - the total for all Score Percent Weights entered should equal 100% for an accurate course score to be generated. For example: A course may include a classroom activity worth 75% and a test worth 25%.

🔴**If a course includes only one learning activity, and that learning activity is scored, enter a Score Percent Weight of 100% to make the score appear on the student transcript.** For example: A course consists of a single test. If the test is assigned a Score Percent Weight of 100%, the score earned on the test will display as the overall course score.

❓ Questions to Consider
1. What types of learning activities will be added to your courses?
2. Who will be responsible for overall instructional design?

✅ Course Learning Activities Checklist
☐ Draft policies regarding:
- Learning activity naming conventions
- Completion mode use
- Use of estimated completion time
- Use of score percent weight

☐ Other:

TEST LEARNING ACTIVITIES

One or more tests can be added to an administrator-developed HLC course. Tests can be placed anywhere within the list of learning activities.

Recommended Practices

🔴**Allow test override if subsidiary affiliations need to add or edit test questions.** This will enable designated affiliations only to customize the test for their students.

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Consider using Multi-Page Presentation mode when the test questions and/or answers include images. This selection will display each test question on a separate HTML screen.

Use display feedback. If un-checked, students will only see their percent scores and not associated rationale for the answers.

To maximize test randomization, consider creating more questions than will be asked when the test is rendered. This will create a question pool from which the randomized test can draw each time it is delivered.

Use Question Groups when covering multiple content or focus areas within a course. Question Groups will allow you to designate a specific number of questions to be asked from each group, thus ensuring a balanced exam. This is important when creating more questions within the test than should be rendered.

Use the True/False test question format for all dichotomy questions. The True and False responses can be edited to represent any antonym, such as Yes/No, Right/Wrong, Up/Down, Left/Right, etc.

Add rationale for both correct and incorrect answers. Reviewing rationale provides students another opportunity for learning.

If using Extended Feedback, use it for every test question. Students will then be presented with a consistent feedback model when reviewing test questions.

Add a prompt to Multiple Select question text e.g. *Check all correct answers.* The prompt will queue students that there may be more than one correct response.

Use text, not numbers for Likert Scale responses. For example:
- Excellent
- Good
- Fair
- Poor

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Do not use the same match more than once in a matching question. The system will view the matches as two different items but cannot be distinguished by the user. For example, DO NOT add:

- Item: Peas   Match: Green
- Item: Corn   Match: Yellow
- Item: Broccoli   Match: Green

Utilize the following reports for tests:

- Test Structure
- Test Question Analysis

Questions to Consider

1. Who will be responsible for writing, reviewing and validating test questions?
2. Who will determine the minimum passing score?
3. When will test override be allowed?
4. Where will we store our test images?
5. Will tests be randomized?
6. Will students be allowed to pause tests?
7. Will Display and Extended Feedback be used?
8. How many times will students be allowed to take a test?

Test Learning Activities Checklist

☐ Identify the person(s) responsible for tests.
☐ Establish, if applicable, a minimum passing score.
☐ Draft a policy regarding test override permissions.
☐ Identify an Internet location for storing test images.
☐ Draft a policy outlining standard test settings such as:

- Randomization
- Timing
- Test pausing
- Display vs. extended feedback
- Number of test attempts

☐ Other:

CLASSROOM LEARNING ACTIVITIES

One or more classroom activities can be added to an administrator-developed HLC course.

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Recommended Practices

⊙**Enter resource types, rooms and resources prior to adding classroom activities.** See Building and Resource Management.

⊙**Enter instructors (administrators) prior to adding classroom activities.** See Administrator Management.

⊙**Mark *Use Qualified Instructors* only when instructors must possess certain qualifications and when additional instructors will never be drawn from the larger instructor pool.** An example is instructors in Advanced Cardiac Life Support (ACLS).

❓ Questions to Consider

1. Have buildings, rooms and resources already been entered in the HLC?
2. Have instructors already been designated?
3. Which classroom activities require specially-qualified instructors?

☑ Classroom Learning Activities Checklist

☐ Enter buildings, rooms and resources.
☐ Add instructors.
☐ Other:

AUTHORED LEARNING ACTIVITIES

Authored learning activities are created using Adobe Contribute, Lectora or other authoring tool. Your organization must purchase the HealthStream Authoring Center to add authored activities to administrator-developed HLC courses.

Recommended Practices

⊙**Determine who will hold the Authoring Center licenses for the organization.** Each license allows the Authoring Center to be added to a single PC workstation.

⊙**Decide which courses require online content.** Activities created using the Authoring Center can be added to any administrator-developed HLC course and accessed directly through the HLC.

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Define a process for authoring content. Determine who will be involved, including subject matter experts, instructional designers, and administrators responsible for creating the authored activity and incorporating it into an HLC course. Also determine how the initial and ongoing content review will be facilitated.

Create a storyboard library. Storyboards provide a tool for designing authored content, and archiving each authored activity outside the HLC.

Establish a policy for seeking and documenting permissions to use copyrighted works. Discuss copyright issues with the Legal or Compliance departments.

Utilize HealthStream authoring templates or create your own template. This will ensure that authored activities appear as designed when students view the online content.

Use file types listed in the Authoring Center User Guide. This will ensure that images, audio and video files will render as expected in the authored content.

Do not incorporate large video files. Oversized files may not play within an authored activity.

If more than one copy of an authored activity exists (for example, because copies were created during course versioning), use the original file if you plan to repurpose the authored content into another course.

Questions to Consider

1. Who will hold the authoring licenses?
2. Who will be on the authoring team?
3. How will storyboards be archived?
4. What will be the policy for initial and ongoing review of authored content?
5. How will copyright permissions be documented?
6. Will authored content be available to other HealthStream customers via the courseware exchange?

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☑ Classroom Learning Activities Checklist

- ☐ Determine who will hold authoring licenses.
- ☐ Identify the authoring team.
- ☐ Create storyboards for authored content.
- ☐ Establish a mechanism for archiving storyboards.
- ☐ Draft a policy for authored content review.
- ☐ Establish a mechanism for documenting copyright permissions.
- ☐ Determine whether authored content will be placed in the courseware exchange.
- ☐ Other

EVALUATION LEARNING ACTIVITIES

Evaluations can be added to administrator-developed HLC courses.

Recommended Practices

Create an evaluation template to use for all administrator-developed HLC courses. Export the template and import it into new courses as they are being created. This process will save time because new evaluations for each new course will not need to be created. Exported/imported evaluation templates can be easily edited to reflect the new course content. Evaluation templates are especially helpful for CE courses where evaluation questions are dictated by the accrediting/approving body.

Use the Question Group functionality to organize evaluation questions. Unlike tests, Question Groups will be visible to students completing evaluations. This will assist in categorizing questions by learning activity, content area or other evaluation question sub-sets.

Use consistent Likert Scale terminology. If the Likert Scale question asks students to rate *effectiveness* for example, responses should use that same terminology (e.g. Highly Effective, Effective, Somewhat Effective, etc.).

Consider an even number of possible Likert responses (as opposed to an odd number). An even number of responses forces respondents to choose a positive or negative position, rather than giving a non-committed or middle-of-the-road reaction.

Add a note to the evaluation introduction ensuring students of anonymity. The evaluation scores report generates aggregate data only and does not identify individual student responses.

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⊙ **Utilize the following reports to manage evaluations:**
- Evaluation Structure
- Evaluation Scores

❓ **Questions to Consider**

1. Who will create the evaluation templates?
2. Will CE courses with mandated evaluation questions be offered?

☑ **Evaluation Learning Activities Checklist**

☐ Determine who will create evaluations.
☐ Identify CE accrediting/approving bodies with mandated evaluations.
☐ Other:

CE CREDIT MANAGEMENT

The CE credit management functionality is available for customers with accredited or approved provider status with one or more accrediting bodies. This feature allows administrators to add CE credit to the courses they develop within the HLC. Remember – maintaining compliance with all CE accreditation/approval rules and regulations is the responsibility of the HLC customer organization.

Recommended Practices

⊙ **Identify the person responsible for the administration of the CE program(s).** That person should be responsible for managing the CE credit functionality within the HLC to ensure that all accreditation/approval standards are met and compliance is maintained.

⊙ **Consider limiting the access to CE Credit Management functionality for other administrators who do not have expertise in accreditation or do not play a role in your organization's CE program administration.** CE accreditation/approval is often not well-understood by those who do not work in that field. To prevent non-compliant use of the functionality, remove access for those who do not possess expertise in this area.

⊙ **Do not utilize the default accrediting/approving bodies found in the HLC.** Those accrediting/approving bodies are used by HealthStream for its own or third-party CE content. They cannot be edited, therefore may not reflect your interpretation of accreditation guidelines. Even if you hold accredited/approved status with one of the default organizations, enter your own (using a prefix to identify it as your entry).

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⊙**Use similar names when entering certificate templates, accrediting/approving bodies and accredited providers.** This will make it easier to link the components together when adding accreditation/approval information to the system.

⊙**Use code snippets only for data within a certificate template that will change from course to course.** For example, because an accrediting body that uses contact hours as its credit unit display name always uses contact hours, type *Contact Hours* into the appropriate space of the certificate template. But, because the number of contact hours is different for each course, use the code snippet *[Credit Units]* as a placeholder for that dynamic data.

⊙**If a certificate template requires specific placement of certificate elements on the page, consider creating the template using a table format with invisible lines.** This technique will allow for left, center and right justification of each certificate element as dictated by the accrediting/approving body.

⊙**Carefully consider any edits to a certificate template, or to any of the screens from which code snippets are drawn.** Certificate templates are dynamic documents, and as such, any changes made to the certificate template itself or to one of the code snippet sources, will alter the certificate wherever it is rendered. If necessary to preserve historical certificates, recreate a new version of the accredited/approved provider with a new certificate template. Version current courses using the old accreditation and apply the new/updated accreditation, or create new courses and retire the previous ones. Edit the previous accreditation/approval names with a Do Not Use or other warning prefix.

⊙**Use the *Allow CE Credit for Learning Events* feature only if compliant with accrediting/approving body guidelines.**

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❓ Questions to Consider

1. Will CE credit be added to the administrator-developed HLC courses?
2. Who will be the CE program administrators/experts?
3. Who will manage the CE credit functionality within the HLC?
4. Which, if any, of the accreditations/approvals will allow CE credit for Learning Event completion?
5. What accreditation/approval mandates will be facilitated through the HLC? For example:
   a. Instructor qualifications
   b. Course descriptions
   c. Learning objectives
   d. Estimated completion times
   e. Financial disclosures
   f. Target audience
   g. Standardized evaluations
   h. Summary evaluation data

☑ CE Credit Management Checklist

- ☐ Identify the person/people responsible for CE accreditation/approval.
- ☐ Determine who will have CE Credit Manager administrator access.
- ☐ Establish a plan for training HLC CE credit managers.
- ☐ Draft a policy for managing CE through the HLC, including accreditation/approval mandates (as above).
- ☐ Enter data for each accrediting/approving body.
- ☐ Determine who will add CE credit to administrator-developed courses.
- ☐ Other:

HLC COURSE PUBLISHING

Administrator-developed HLC courses cannot be used by administrators or students until the courses are published.

Recommended Practices

⊙**Prior to publishing a course, preview it.** Make sure that all desired learning activities have been added, and if they are to be completed sequentially, that they appear in the correct order. Remember – learning activities cannot be added, deleted or re-ordered once a course has been published.

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Change the development status from *In Development* to either *Development Complete or Approved* prior to publishing. Although development status does not impact the ability to publish a course (except for lower-level administrators), routinely moving published courses from their *In Development* states will assist in future course searching.

Remember to grant permissions prior to publishing if the intent is to allow certain subsidiaries the ability to override tests and/or evaluations. Simply marking override permission for a test or evaluation does not automatically make override possible. Prior to course publishing, use the *Permissions* functionality to designate the specific subsidiaries being given override permission.

Use the advanced publishing feature if subsidiary affiliations require different publish settings. This includes the ability to access a course from the Catalog tab, or the need to set different *go live* dates for different affiliations.

Always check the Request Manager after publishing a course to ensure that the publish attempt was successful. If you find that publishing failed, check the following:
- Were the test settings edited so that they designated the number of questions to be included?
- Was the authored learning activity associated with a specific content folder?

Once the problem is identified, republish the course and check the Request Manager again.

Utilize the following reports to assist in managing courses:
- Course Development Status
- Course Listing
- Top 10 Courses Completed
- Failed Courses

Questions to Consider

1. How will administrator-developed HLC courses be reviewed prior to publishing?
2. Who will be responsible for publishing courses?
3. Which courses will be available in the student Catalog for self-enrollment?
4. Which courses will allow completion through a Learning Event?
5. Which courses will be granted override permissions? To whom?

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☑ HLC Course Publishing Checklist

☐ Draft a policy outlining the review process for administrator-developed courses.
☐ Identify who will publish courses.
☐ Determine which courses will be made available for self-enrollment.
☐ Determine which courses will allow completion through a learning event.
☐ Establish criteria for allowing override permissions.
☐ Other:

CLASSROOM ACTIVITY SCHEDULING

Classroom activities cannot be scheduled until the administrator-developed HLC course, that includes the activity, has been published.

Recommended Practices

When a class is offered more than one time, use the *copy* feature to recreate the class. All class data will copy over exactly, including date, time and location, except for class registrations or waitlists. Remember – do not add a new session to the class copy. Edit and update the current class date and time, and then save the copy.

If a class will be offered more than once, consider adding the class date to the original class name and to each class copy. This will enable you to scan a class search return to easily find the class date you are looking for.

Be sure to break multiple day classes into separate sessions for each day. For example, a five full-day class is a class with five separate eight hour sessions.

If each session of a class needs to be graded, create separate classes for each session. Grading occurs at the class level only, not at the session level.

Do not forget to grade each completed class. Grading is the indicator of classroom activity completion and/or passing. For example: If the classroom activity is marked *Completion Required* and is part of a course that includes sequential learning activities, students cannot progress through other learning activities until their participation in the class is recorded.

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Utilize the following reports to manage classes:
- Class Contacts
- Class Grading Status by Administrator
- Class Grading Status by Course
- Class Registration Status
- Class Roster and Sign-in
- Instructor Class Schedule
- No-show
- Upcoming Classes

Questions to Consider

1. Who will be responsible for scheduling classes?
2. Who will be responsible for registering students?
3. What level of registration access will students be given?
4. Will waitlists be applied to class registration?
5. Who is responsible for grading classes?

Class Activity Scheduling Checklist

☐ Determine who will schedule classes, register students and grade classes.
☐ Draft a policy outlining:
- Class naming convention
- Student registration options, including use of waitlists
- Timeframe for grading classes

☐ Other:

HLC COURSE VERSIONING

Learning activities may not be added, deleted or re-ordered in an administrator-developed course, once the course has been published. Instead, a new course version must be created.

Recommended Practices

Carefully consider how versioning the course will impact classroom activities associated with the previous version. Detailed information about the impact of course versioning on existing classroom activities can be found in the online Help system.

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⊙**Determine if students should be allowed to complete the course version they are already enrolled in or if they should be un-enrolled and re-enrolled into the new course version.** If the un-enroll and re-enroll option is chosen, students will be required to complete all learning activities within the course, even if they have completed some of the activities in the prior course version.

⊙**If you need to report on each course version separately, do not version the course.** Instead, create a new course. Versions of a course are a continuation of the same course and are reported on as such.

Questions to Consider

1. Will new course versions or new courses be created when needed?
2. Who will be responsible for determining if students must be un-enrolled and re-enrolled?

☑ HLC Course Versioning Checklist

☐ Draft a policy outlining your criteria for course versioning.
☐ Determine who will be responsible for versioning courses.
☐ Other:

OTHER RECOMMENDED PRACTICES

⊙**Participate in a local HealthStream User Group (HUG).** HUGs participation is a great way to network with other HLC users, receive additional training and hear about the latest HealthStream offerings.

⊙**Submit enhancement requests through the Idea Box link.** The idea box can be accessed from the Services tab of the administrator login. Click the link and you will be taken to a screen where you can share suggestions with HealthStream.

⊙**Come to HealthStream Summit.** The HealthStream Summit is our annual customer event, held in Nashville, Tennessee. At Summit, you will have access to educational sessions, additional training, product information, vendor exhibits and numerous networking opportunities with your administrator colleagues.

⊙**Utilize the customer service portal.** This portal allows you to electronically log an issue and open a ticket in our customer support site. Through your account you can also add notes, and track progress toward problem resolution.

CONCLUSION

Once again, thank you for choosing HealthStream as your partner in education! We hope you found this tool to be helpful, as you plan your rollout of the HLC.

For additional information, contact HealthStream Customer Service at 800.521.0574 or if available, your internal HLC Support Staff.

ADDITIONAL NOTES: