Alert Setup and Utilization Part One:

Preparing Your Platform to Use Alerts

Provided by HealthStream Operations

Summary

Alerts provide a way to keep end users informed of certain events within the platform and various applications. Students, supervisors and instructors can receive these notifications, which are referred to as *alerts*. Some things to consider before enabling alerts are

- Ensuring that the target recipients (students, supervisors, and instructors) are set up appropriately.
- Alert templates, subscriptions, and schedules should be defined, documented, and implemented based on the needs of the organization.

This document is part one of a series of recommended practices related to alerts, and provides an Alert Site Preparation checklist to review as your institution or organization prepares to set up and use alerts. The following resources are in development and will be made available once they are finalized:

- Alert Setup and Utilization Part Two: Alert Templates
- Alert Setup and Utilization Part Three: Alert Subscriptions & Scheduling

Rationale

Alerts provide automatic notifications and reminders to HealthStream users. These reminders support educational and workforce development initiatives even when users are not logged on to HealthStream. This automated process saves time and reduces administrative tasks. Ensuring that your organization's platform is prepared for alerts can have significantly increasing the chances of an engaging and successful rollout. It is recommended that you complete the Alert Site Preparation Checklist below before implementing alerts at your institution or organization.

How To

Keep the following points in mind as your organization/institution reviews the Alert Site Preparation Checklist below:

- Consider what email address format will be used/accepted by the organization. For example, will you allow personal (as opposed to business) email addresses to be used?
- Remember, any imported email addresses will overwrite any manually entered ones.
- Alerts will be generated for various applications such as Learning, Competency, and Performance.
  - Assignment alerts, for example, will be generated regardless of the content assigned (courses, curricula, equivalents, assessments, etc.). Keep this in mind as you begin the internal discussions of how your organization/institution may want to set up alerts.
- There are two types of alerts: in-system and email.

- In-system alerts, as their name implies, can be read when users are logged on to the system.
- Email alerts are messages sent to users with a valid email address in the system.
- Email alerts can be configured to be sent separately or in a single summary email.
- The content of the alert is set through alert templates. Additional information about alert templates will be provided in an upcoming document.
- Alert templates can be configured from an organization level and shared to subsidiary affiliations (institutions) within the same hierarchy. Alert templates created at the institution level will supersede templates created at the organization level.
- Alert subscriptions and scheduling must be managed at the institution level. Additional information about alert templates will be provided in an upcoming document.
- Users who do not have an email address on record can still read in-system alerts.

To ensure that your institution/organization's platform, administrators, students, instructors and supervisors are ready to begin working with and receiving alerts, review the following checklist.

Alert Site Preparation Checklist		
Task	*Notes*	*Progress*
Review the Online Help section on Alerts the training course "Administrator Academy-Alerts," if it is available.		☐ Complete Date: _____ Completed by:
Check with IT to confirm that **@healthstream.com** has been whitelisted Tip: Refer to the technical requirements document in the online Help for additional information		☐ Complete Date: _____ Completed by:
Determine the current status of user email addresses. Tips: 1. Run the Role Utilization report, including email address, for student role assigned 2. Determine which users do not have an email address 3. For those users who do not have an email address, do one of the following: a. Include email address in demographic imports	Remember, if a Student does not have an email address, he or she can still receive in-system alerts.	☐ Complete Date: _____ Completed by:

b. Manually add the email address (if users have been granted this permission) c. Direct users to manually add their email address to their profile (if users have been granted this permission) 4. Run a Role Utilization report to confirm all email addresses are set up as desired		
Identify and document a plan for continuous review of email addresses to ensure that all employees have an email address in the system. Tip: **Have applicable administrators add a calendar reminder to run the Role Utilization report and check email addresses at least once a quarter.**		☐ Complete Date: _____ Completed by:

Confirm that all applicable end users have supervisors, especially if using supervisor alerts
 	
 Tips:
 1. Run the HealthStream Analytics Employees without Supervisor report or the standard Enterprise Student Listing report.
 2. Determine which users do not have a supervisor associated with their profiles.
 3. For those users who do not have a supervisor, do one of the following:
    a. Include the appropriate supervisor user ID in demographic imports (if users have been granted this permission).
    b. Manually add the supervisors (if users have been granted this permission).
 4. Run the HealthStream Analytics Employees without Supervisor report or the standard Enterprise Student Listing report, if available, to confirm that all employee/supervisor associations are set up correctly.
	If you do not have access to HealthStream Analytics or the Enterprise Student Listing report, contact Customer Service to request that this reporting functionality be enabled.
	
	 Remember, if a supervisor does not have an email address, he or she can still receive in-system alerts.
		☐ Complete
		 Date: _____
		 Completed by:

Identify and document a plan for continuous review of supervisor data to ensure that all employees have the appropriate supervisor on their profile Tip:		☐ Complete Date: _____ Completed by:

Alert Site Preparation Checklist		
Have applicable administrators add a calendar reminder to run the HealthStream Analytics Learning-Active User report or the standard Enterprise Student Listing report at least once a quarter to ensure that all employee/supervisor associations are set up as correctly.		

Confirm that instructors are set up as needed, especially if you will use instructor alerts
 	
Tips:
1. Run the Role Utilization report.
2. Review the list of instructors to determine whether all of them should remain as instructors and receive alerts.
3. For those users who are not instructors or should have their instructor access removed, perform one of the following:
    a. Include instructor changes in a role import. Please refer to the Import Specification document located in the online Help for further details.
    b. Add or remove instructors manually.
4. Run the Role Utilization report for instructors to ensure all are set up as needed.
		☐ Complete
		Date: _____
		Completed by:

Identify and document a plan for continuous review of instructors to ensure that the appropriate instructors are in place. Tip: Have applicable administrators add a calendar reminder to run the **Role Utilization report at least once a quarter to ensure** that **all** instructors are appropriately assigned.**		☐ Complete Date: _____ Completed by:
Confirm that NRP administrators are set up as needed, especially if you will use the Live Event alerts. Tips: 1. Run the Role Utilization report. 2. Review the existing list of NRP administrators to determine whether all should remain as NRP administrators and receive alerts. 3. For those users who are not NRP administrators and/or should have their NRP		☐ Complete Date: _____ Completed by:

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Administrator access removed, do one of the following:
   a. Include changes in a role import.
   b. Add or remove NRP administrators manually.
4. Run the Role Utilization report for NRP administrators to ensure all are set up as needed.		

Identify and document a plan for continuous review of NRP administrators to ensure that the appropriate administrators are in place. Tip: **Have applicable administrators add a calendar reminder to run the Role Utilization report to ensure all NRP administrators are appropriately assigned.**		
Alert Management Access – What access will end users (students) have to alerts (view, add, edit or delete) Tips: 1. **Refer to Appendix A for Student Alert features.** 2. Run the Role Feature report on the appropriate student roles to identify any existing alert management access for end users. 3. Review features to ensure that access is aligned with the institution/organization preferences/policy. 4. Contact Customer Service to request any role feature adjustments.		☐ Complete Date: _____ Completed by:
Identify the administrator role(s) that need access to alert management features *Recommended administrator roles that may need access to alerts:* • *Enterprise Administrator* • *Institution Administrator* • *Competency Administrator* • *Performance Administrator* • *Assessment Administrator* • *NRP Administrator*		☐ Complete Date: _____ Completed by:

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Alert Site Preparation Checklist		
Alert Management Access – What access will the identified administrator roles have to alerts (view, add, edit, or delete) Tips: 1. Refer to Appendix A for Administrator Alert features. 2. Run the Role Features report to identify existing alert management access for current administrator roles 3. Review role features to ensure that access is aligned with the institution/organization preferences/policy. 4. Contact Customer Service to request any role feature adjustments.	**Person(s) administering HCC Alerts will also need at least View access to Institution Subscriptions and Template Editor features.**	☐ Complete Date: _____ Completed by:

Appendix A

Alert Role Features

Role features that are included for alerts for both student and administrator roles are listed below. Please note that some features are application-specific and may not be available at your organization/institution.

Student Role Features:
   My Profile
   - Alert Management: Provides the alert management subscription area to students so they may override the alert settings from their institution.
   - Alert Management – Certification: Provides certification alerts to the Manage Alerts area for the ability to override the alert settings from their institution.
   - Alert Management – License: Provides license/discipline alerts to the Manage Alerts area for the ability to override the alert settings from their institution.
   - Alert Management – Membership: Provides membership alerts to the Manage Alerts area for the ability to override the alert settings from their institution.
   - Alert Management – NRP Certifications: Provides NRP certification alerts to the Manage Alerts area for the ability to override the alert settings from their institution.
   - My Alerts: Provides the student access to viewing their own alerts from the past 60 days.

Use the table below to help identify the alert permissions for the Student role. Place an "X" or checkmark in the column to indicate the level of access you want the student role to have for that feature.

Student Role Features				
Feature	**View**	**Add**	**Edit**	**Delete**
Alert Management				

Feature				
Alert Management - Certification				
Alert Management – License				
Alert Management - Membership				
Alert Management – NRP Certifications				
My Alerts				

Administrator Role Features:

People
- Student My Alerts: Provides the administrator user access to view a selected student's alerts from the past 60 days. This is given in the Manage Students area.

Tools
- Alert Management – Certification: Provides access to certification alerts for the institution subscriptions.
- Alert Management – Institution Subscription: Provides the Manage Alerts Subscriptions area to manage the organization alerts subscription.
- Alert Management – License: Provides access to license alerts for the institution subscriptions.
- Alert Management – Membership: Provides access to Membership alerts for the institution subscriptions.
- Alert Management – NRP Certification: Provides access to NRP certification alerts for the institution subscriptions.
- Alert Management – Template Editor: Provides the Manage Alerts Templates area to customize the alert content templates within the organization.

My Profile
- My Alerts: Provides the administrator user access to view their own administrator alerts from the past 60 days.

Assessments
- HCC – Alert Management: Provides the administrator user access to setup and use alerts related to Competency and/or Performance applications.

Live Events Management
- LEM Alerts Management: Provides the administrator user access to setup and use alerts related to Live Events for NRP.

Use the table below to help identify the alert permissions for the administrator role(s). Place an "X" or checkmark in the column to indicate the level of access you want the administrator role(s) to have for that feature.

Administrator Roles and Features				
Administrator Role: Enterprise Administrator				
Feature	**View**	**Add**	**Edit**	**Delete**
Student – My Alerts				
Alert Management - Certification				
Alert Management – Institution Subscription				
Alert Management – License				
Alert Management - Membership				
Alert Management – NRP Certifications				
Alert Management – Template Editor				
My Alerts				
HCC – Alert Management				
LEM – Alerts Management				

Administrator Roles and Features

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Administrator Role: Institution Administrator				
Feature	**View**	**Add**	**Edit**	**Delete**
Student – My Alerts				
Alert Management - Certification				
Alert Management – Institution Subscription				
Alert Management – License				
Alert Management - Membership				
Alert Management – NRP Certifications				
Alert Management – Template Editor				
My Alerts				
HCC – Alert Management				
LEM – Alerts Management				

Administrator Roles and Features				
Administrator Role: Assessment Administrator				
Feature	**View**	**Add**	**Edit**	**Delete**
Student – My Alerts				
Alert Management - Certification				
Alert Management – Institution Subscription				
Alert Management – License				
Alert Management - Membership				
Alert Management – NRP Certifications				
Alert Management – Template Editor				
My Alerts				
HCC – Alert Management				
LEM – Alerts Management				

Administrator Roles and Features				
Administrator Role: NRP Administrator				
Feature	**View**	**Add**	**Edit**	**Delete**
Student – My Alerts				
Alert Management - Certification				
Alert Management – Institution Subscription				
Alert Management – License				
Alert Management - Membership				
Alert Management – NRP Certifications				
Alert Management – Template Editor				
My Alerts				
HCC – Alert Management				
LEM – Alerts Management				

Online Help Resources

[Alerts](#)

[Available Alerts](#)

[Subscribing Users to Alerts](#)

[Alert Templates](#)

[Summary Alert Emails](#)

[Viewing Your In-System Alerts](#)

[Deleting In-System Alerts](#)

[Viewing a Student's Alerts](#)

[E-learning Module - Alerts](#)

[FAQ](#)

[Role Features Report](#)

[Role Utilization Report](#)