HealthStream Connect Administrator User Guide

HealthStream Learning Center™

Contents

Administrator Overview of HealthStream Connect 1
HealthStream Connect Process Overview 1
Administrator Access and Privileges 3
Navigating HealthStream Connect as an Administrator 3
Logging into HealthStream Connect as an Administrator 4
Logging Out of HealthStream Connect 5
Menu Bar 5
Site Map 6
Text Sizing 6
Keyboard Shortcuts 7
Using the WYSIWYG Editors 7
Editing Text 8
Inserting Images 8
HealthStream Connect Calendar Tool 9
Managing Your Administrator Profile 10
Managing Your System Preference 10
Checking System Requirements 11
Administrator Management 12
Adding an Administrator 12
Searching for an Administrator 13
Editing an Administrator Record 14
Deleting an Administrator Record 15
Adding a Student 15
Student Management 16
Searching for a Student 17
Viewing Student Information 19
Viewing a Student's Transcript 20
Viewing a Student's License Information 21
Instructing Your Students to Use HealthStream Connect 23
Managing Discipline and License Information 24
Annotations Management 26
Adding an Annotation 26
Searching for an Annotation 29
Editing an Annotation 32
Deleting an Annotation 33
Exporting and Importing Annotations 33
Exporting Annotations 34
Importing Annotations 36

Reports 37
People Reports 37
Discipline Listing Report 37
Expiring License Report 38
Student and Group Transcript Report 39
Student Listing Report 40
Course Reports 41
Annotations Report 42
Course Listing Report 43
Expiring Courses Report 43
Education Reports 44
Course Completion – Schedulable Report 44
Tools Reports 46
Department Listing Report 46
Additional Procedures for Creating Reports 47
Searching for Courses for a Report 47
Searching for Students for a Report 47

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.

Administrator Overview of HealthStream Connect

HealthStream Connect is a professional services engagement between HealthStream and your organization in which we allow your users to access HealthStream-hosted courses from within your primary Learning Management System (LMS). The HealthStream Product Integration team will work closely with your learning and technical team, as well as your LMS vendor, to create a successful integration that enables your organization to schedule, deliver, and track many of HealthStream's courses seamlessly via your primary LMS.

Benefits to your organization include:

- A proven integration methodology based on an established industry standard that allows you to work with one vendor – HealthStream – to access quality healthcare content from over 30 leading content publishers.
- Facilitates assignment and tracking of HealthStream-hosted courses through your primary LMS using learning industry standard AICC guidelines.
- Unique reports available through the HealthStream Connect platform.

HealthStream Connect Process Overview

All communication between HealthStream Connect and the primary LMS are accomplished via AICC standards. For more information about AICC compliance, please visit www.aicc.org.

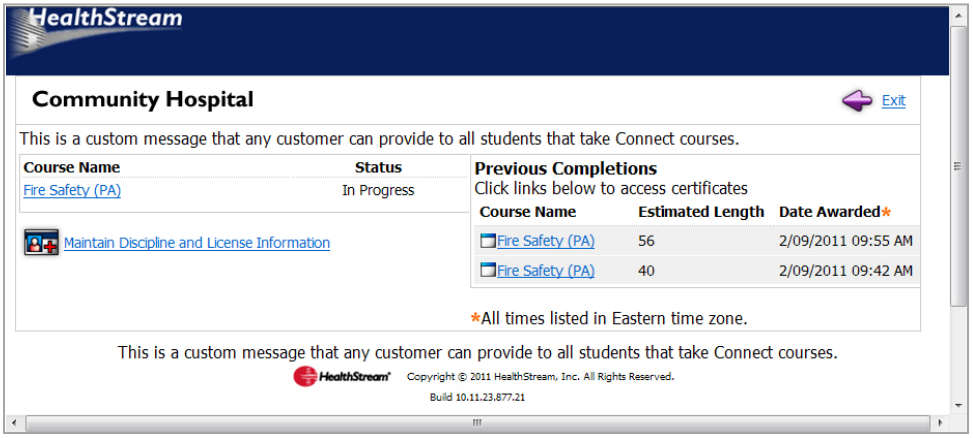
Implementation

1. The HealthStream Product Integration Manager provides course structure files to the administrator for the contracted courseware.
2. The administrator provides the course structure files to the primary LMS manager/vendor.
3. The primary LMS manager/vendor works with the administrator to setup the courseware via either the Course Structure File Import method or the URL Launch Method. (These methods are covered in more detail in the Connect Course Implementation Specifications section of this document).
4. The courses are configured and the administrator makes the courses available to students via the primary LMS.

Student Utilization

1. The student accesses the course via the primary LMS.
2. The primary LMS sends a call to HealthStream Connect to start the course session.
3. Behind the scenes, HealthStream Connect requests AICC information from the primary LMS. The primary LMS sends back the parameters of the course session, including the session ID, the user ID, lessons status, and the AICC_URL to which Connect should report results of the session.
4. If the student is accessing HealthStream Connect courseware for the first time, a user account is created in the Connect site so that the student's completions can be tracked correctly.

5. The HealthStream Connect switchboard page displays to the student in a new window. The switchboard page (shown below) displays the title and status of the course to the student. The student clicks the course name to view the course.



6. Within the primary LMS, the course status is set as In Progress.
7. The student interacts with the course and generates a status by exiting, completing, passing, or failing the course (depending on the course design).
8. The course status is recorded in the HealthStream Connect site.
9. HealthStream Connect communicates an updated status and score (if applicable) back to the primary LMS relative to the structure of that course and how the student terminated the course. This status is communicated via the AICC URL previously provided by the primary LMS.
10. The primary LMS updates the student's course status accordingly.
11. The student exits the course and is returned to the Connect Switchboard page. The page now displays the updated course status and certificate of completion (if applicable).

Single-Enrollment Session Courses

Depending on the details of your implementation, certain courses may be setup for single-enrollment within HealthStream Connect. This feature can help prevent unintended student enrollment and license consumption.

With single-enrollment, the Connect Switchboard page behaves differently when a student has previously failed or completed the course. If, when the course session is created, the primary LMS communicates a lesson status of "failed" or "completed" to HealthStream Connect, the Connect Switchboard page displays the course name as a disabled link. In this case, the student is prohibited from launching the course again.

Note: It is the responsibility of the primary LMS to manage when and how often the student can enroll in the course. According to AICC standards, the following must occur in order for single-enrollment courses to function properly:

- After the student's initial course session, the primary LMS must update the course status based upon the data passed back from HealthStream Connect. This is indicated in step 15 of the process above.
- The primary LMS must pass a lesson status of "failed" or "completed" to HealthStream Connect when Connect responds to any secondary course launch request, as indicated in step 7 of the process above. This process is documented in more detail in document number CMI001 ("AICC/CMI Guidelines for Interoperability") at www.aicc.org: "On re-entry into the AU, the CMI passes the previous status returned by the AU."

Administrator Access and Privileges

As a Connect administrator, you will be responsible for many of the day-to-day platform management functions.

You may be able to perform a variety of tasks including:

- Managing students (employees)
- Managing other administrators
- Managing annotations
- Generating reports
- Maintaining your administrator account information

Navigating HealthStream Connect as an Administrator

Throughout HealthStream Connect you will see special function buttons (for example, **Save**, **Update**, **Pause**, **Next**, **Exit**, **Logout**, etc.). Whenever you make changes or choose to exit the system, be sure to use the special function buttons as opposed to clicking the **X** in the upper right-hand corner of the page. Using the special function buttons ensures that your work is saved to the system.

Logging into HealthStream Connect as an Administrator

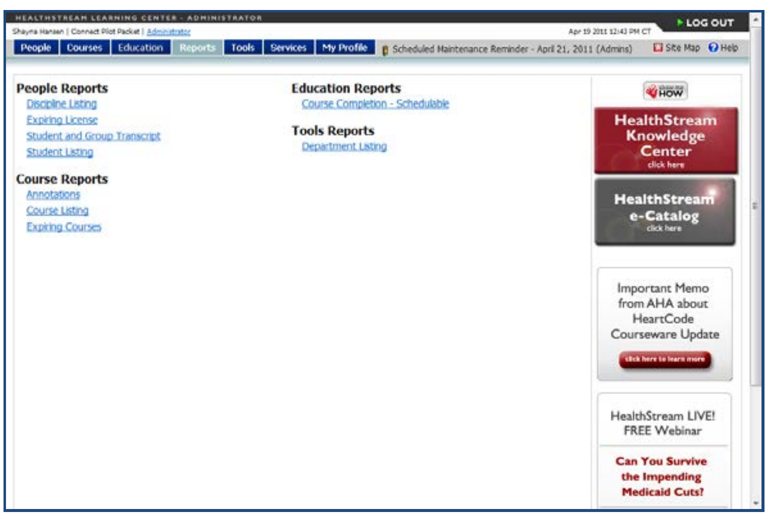
There are two ways to access HealthStream Connect

1. Use of the following ways to access HealthStream Connect:
   - Open Internet Explorer and type the web address (also called a URL) provided by your administrator (for example: **www.healthstream.com/FacilityName**).
   - You may have a HealthStream Connect icon on your PC desktop or your institution's intranet. If so, double-click on the **HealthStream Connect** icon. The **Login** page appears.

2. In the **User ID** box, enter your user ID.
3. In the **Password** box, enter your password. Passwords are case-sensitive.

Note: If you have forgotten your password, enter your User ID and click **Password Reminder** (if available). If you have forgotten your user ID, contact your administrator.

4. Click **Login**. The **Site Map** appears by default.



Logging Out of HealthStream Connect

Click **LOG OUT** on the right-hand side of the menu bar when you wish to exit the system.

If you do not exit, the system will automatically log you out after a period of time, as determined by your administrator.

Note: Throughout HealthStream Connect you will see special function buttons (or example, **Save**, **Update**, **Pause**, **Next**, **Exit**, **Logout** etc.). Whenever you make changes or choose to exit the system, be sure to use the special function buttons as opposed to clicking the **X** in the upper right-hand corner of the page. Using the special function buttons ensures that your work is saved to the system.

Menu Bar

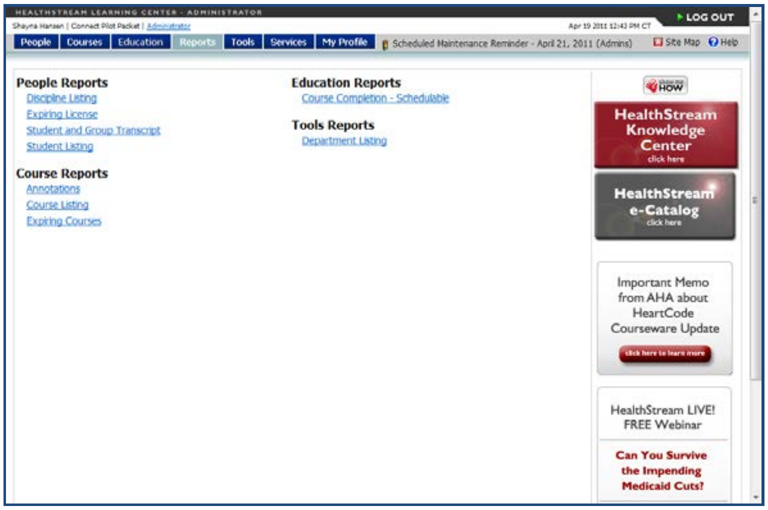
The menu bar of HealthStream Connect is divided into five main tabs:

- **People** – Includes student and administrator management functionality.
- **Courses** – Includes course and annotations management.
- **Education** – This tab is disabled for HealthStream Connect customers.
- **Reports** – To access people, course, education and tools reports, as well as HealthStream Connect Request Manager.
- **Tools** – Includes institution management functions.
- **Services** –To access Online Help, HealthStream resources, and the Idea Box for submitting enhancement requests.
- **My Profile** – To manage your administrator account and system login preference.

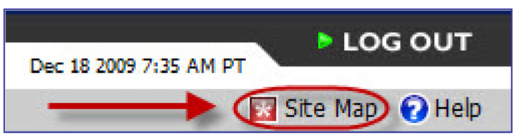
In addition you will see a **Site Map** link, the **Discuss** link (to access the Customer Community), the **Help** icon, and a **LOG OUT** button in the menu bar.

Site Map

Tip: You may use the **Alt+8** key combination to access the Site Map.

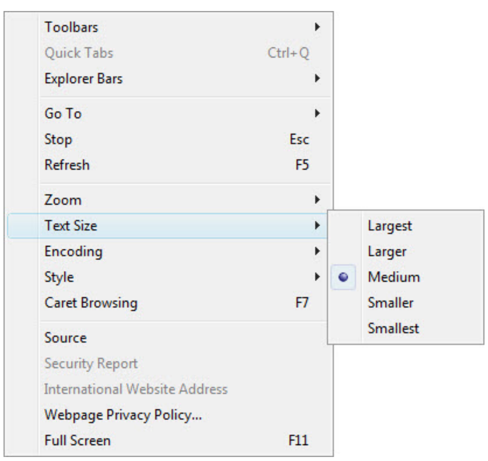


The Site Map for administrators provides quick access to all features and functions available from the main tab pages. The **Site Map** icon and link are available throughout HealthStream Connect.



Text Sizing

To resize the displayed text in HealthStream Connect, from the Internet Explorer menu bar click **View > Text Size** and select the desired text size from the list of available size options, as shown below.



Tip: If your mouse has a scroll wheel on top, you can hold down your computer's **Ctrl** key and scroll with your mouse (up or down) to increase or decrease text size.

Keyboard Shortcuts

HealthStream Connect includes keyboard shortcuts. Use the following keyboard shortcuts to access different areas of HealthStream Connect.

Area	Keyboard Shortcut	Description
People	Alt+O	Manage students, student groups, administrators, and roles.
Courses	Alt+C	Manage courses.
Reports	Alt+R	Access reports.
Tools	Alt+T	Manage institution information.
Services	Alt+V	Access additional HealthStream products and services.
My Profile	Alt+I	Manage profile information and preferences.
Site Map	Alt+8	Site map containing links to all HealthStream Connect features. (The 8 is the same as *, which is used as the **Site Map** icon.)
Help	Alt+H	Access the Online Help system.
Yes	Alt+Y	Selects the **Yes** option in a Session Timeout Warning.
No	Alt+N	Selects the **No** option in a Session Timeout Warning.
Save	Alt+S	Saves the page you've edited or the record you've added (for pages which contain a **Save** button) or starts a search (for pages which contain a **Search** button).
Save and Add Another	Alt+Z	Select the **Save and Add Another** option on this page.
Cancel	Alt+.	Selects the **Cancel** option on the current page.
Select	Alt+L	Triggers the **Select** button.
Top of Page	**Home** key	Press the **Home** key to go to the top of the page. Place cursor outside of text fields and press **Home**.
Bottom of Page	**End** key	Press the **End** key to go to the bottom of the page. Place cursor outside of text fields and press **End**.

Using the WYSIWYG Editors

Throughout the HealthStream Connect administrator interface you will find editing windows that use a WYSIWYG (What You See Is What You Get) format. Within these editing fields, you can format text exactly as you wish it to appear for students.

Note: In HealthStream Connect, WYSIWYG editing windows are used for crafting Annotations on HealthStream Regulatory courses. See the *Connect Annotations Management* guide for more information.

Editing Text

To edit text using the WYSIWYG editor

1. Type **text** into the editing window.
2. Utilize the desired editing tools to format text, including font size, color, bold, justification etc. To edit specific text, first **highlight** the text.

Inserting Images

Images can be inserted into WYSIWYG fields. **Images must be hosted in an images directory on the Internet, such as your organization's web server**. This process allows the images to be viewed by students while also appearing on annotations, assessments and reports (such as Test Question Analysis). HealthStream Connect cannot access files and/or images hosted behind a firewall (e.g. on an intranet, shared network directory, or on a personal computer) therefore, images hosted via any of these sources will not appear. Reports will show the 'Alt Text' if used (described below) in place of the image if an image is not accessible by HealthStream Connect.

Note: Supported image formats include JPG, GIF, or PNG graphic. Animated GIFs may be used, but only the first frame will be visible within printed reports. Flash files (.SWF) are not usable at this time.

To add an image

There are two ways to add an image within HealthStream Connect. Once the image is hosted on an Internet web server (details provided within "Image Location" section above), browse to the image using Internet Explorer.

1. **Drag & Drop** the image or its icon (in a web directory or file folder) from one browser window into the editor in HealthStream Connect, or
2. **Copy & Paste** the image from a web page into the editor in HealthStream Connect.

To label an image for a report

1. Once an image has been added, right-click on the **image**.
2. Click **Set Image Properties**.
3. Enter text next to **Image Alt Text** (up to 150 characters) and optionally, **Long Description** (optional, up to 30,000 characters). This text should simply describe the image. If it is used for a test question, be careful not to reveal the answer to a test question the image represents (e.g. Correct Answer or EKG Strip: Atrial Flutter). When a user's mouse hovers of the image, the image label now appears.
4. Click **OK**. The text is embedded in the source code of the item where the image resides.

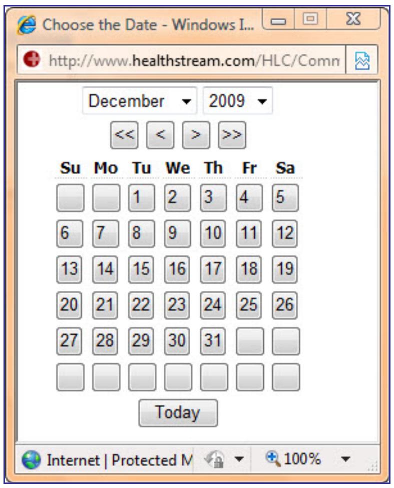
Note: Please remember to observe copyright permissions when using images other than your own.

HealthStream Connect Calendar Tool

A calendar tool can be found throughout HealthStream Connect adjacent to date selection fields. Date selections can be manually populated by typing dates in using the MM/DD/YYYY format, or by clicking the calendar tool and selecting the desired date.

To use the calendar tool for date selection

1. Click the **calendar tool icon** adjacent to a date selection field.  The calendar displays today's month and year.



2. Click the **month** dropdown to select the desired month, or use the **forward or back** single arrows to change month selection.
3. Click the **year** dropdown to select the desired year, or use the **forward or back** double arrows to change the year selection.
4. Click the **desired day**. That date will populate the date selection field.

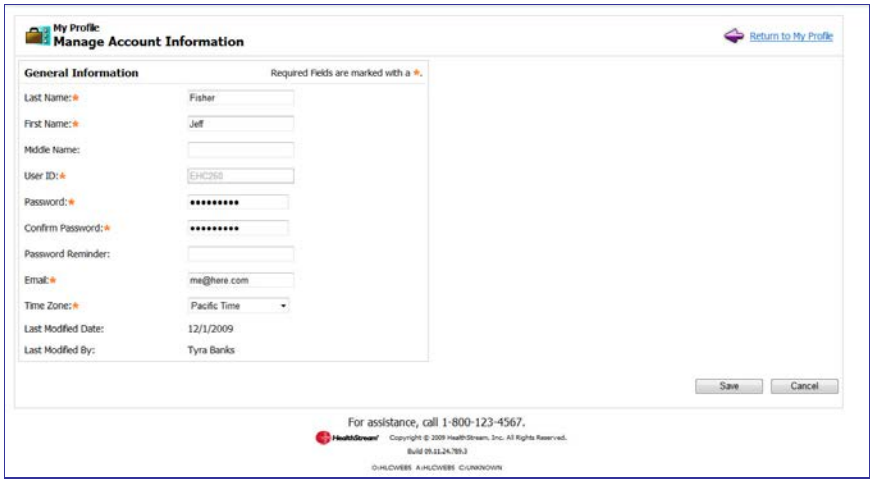
   Tip: You may also use the Today button at the bottom of the calendar tool as a shortcut for selecting today's date.

Managing Your Administrator Profile

By default, you can manage all administrator account information except your User ID.

To manage your administrator profile

1. On the **My Profile** tab, click **Manage Account Information**. The **Manage Account Information** page appears.



An orange asterisk (*) indicates a required field.

2. Make the desired edits, noting that by default you cannot edit your user ID.
3. Click **Save**.

Managing Your System Preference

The system preference selection allows you to set your personal preferences when administering HealthStream Connect.

The default **Login** page allows you to determine which page will appear upon administrator login.

To select your preference

1. On the **My Profile** tab, click **Manage System Preferences**. The **Manage System Preferences** page appears.

An orange asterisk (*) indicates a required field.

2. Click the desired default login page.
3. Click **Save**.

To select your default report view

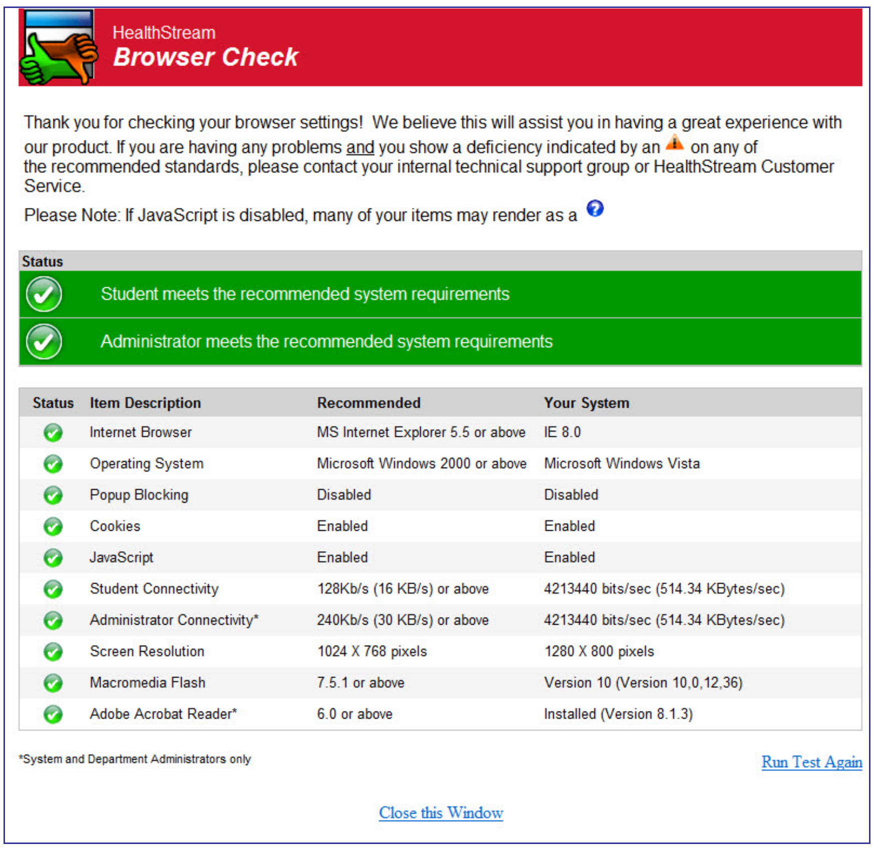
1. Click the desired default report view:
   - **Show Basic Options only** (default setting) - Only the essential report options are displayed when the report is selected.
   - **Show All Options (Basic and Additional Options)** - All report options are displayed when the report is selected.
2. Click **Save**.

Checking System Requirements

If you experience problems navigating HealthStream Connect or if the system is not running as expected, contact your HealthStream support service. Your support representative may ask that you perform a system check on the computer you are using to help determine the cause of the problem.

To perform a system check

1. On the **My Profile** tab, click **Check System Requirements**. The browser check window appears.



HealthStream
Browser Check

Thank you for checking your browser settings! We believe this will assist you in having a great experience with our product. If you are having any problems and you show a deficiency indicated by an ⚠ on any of the recommended standards, please contact your internal technical support group or HealthStream Customer Service.

Please Note: If JavaScript is disabled, many of your items may render as a

Status

Student meets the recommended system requirements

Administrator meets the recommended system requirements

Status	Item Description	Recommended	Your System
	Internet Browser	MS Internet Explorer 5.5 or above	IE 8.0
	Operating System	Microsoft Windows 2000 or above	Microsoft Windows Vista
	Popup Blocking	Disabled	Disabled
	Cookies	Enabled	Enabled
	JavaScript	Enabled	Enabled
	Student Connectivity	128Kb/s (16 KB/s) or above	4213440 bits/sec (514.34 KBytes/sec)
	Administrator Connectivity*	240Kb/s (30 KB/s) or above	4213440 bits/sec (514.34 KBytes/sec)
	Screen Resolution	1024 X 768 pixels	1280 X 800 pixels
	Macromedia Flash	7.5.1 or above	Version 10 (Version 10,0,12,36)
	Adobe Acrobat Reader*	6.0 or above	Installed (Version 8.1.3)

*System and Department Administrators only

Run Test Again

Close this Window

2. Note features marked with a red **X**, as this indicates items for which the computer does not meet minimum requirements for HealthStream Connect to function properly.
3. Report all red **X** items to your HealthStream support service.

Note: The browser check may also be accessed by clicking **Check System Requirements** (if available) on the **My Profile** page of the student or administrator login.

Administrator Management

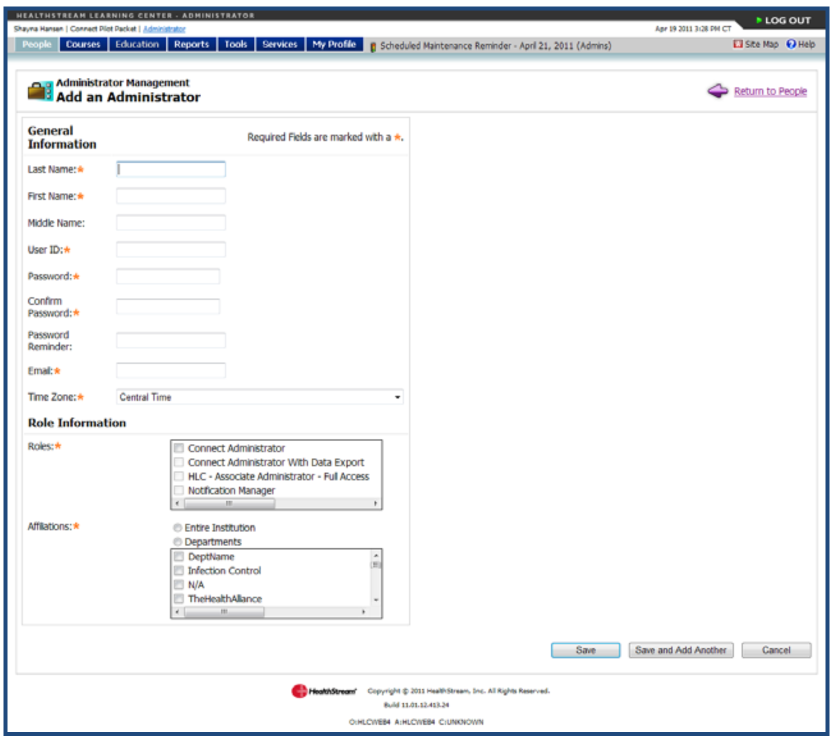
HealthStream Connect offers one administrator role. The Connect administrator has access to all features and functions within the Connect platform, as outlined in the Connect Administrator User Guides.

The following outlines key points related to administrator management within HealthStream Connect:

- Administrators can be given access to the entire institution, or to specified departments or subsidiary affiliations.
- Administrators have access to add and manage other Connect administrators. Administrator management can be enabled for all administrators. However, administrators can only add or manage other administrators at or below their own level of access. Access is defined by enabled features.

Adding an Administrator

1. On the **People** tab, click **Add an Administrator**. The **Add an Administrator** page appears.



2. In the **Last Name**, **First Name**, and **Middle Name** boxes, enter the administrator's last, first, and middle names.
3. In the **User ID** box, enter the user ID that this administrator will use to log into HealthStream Connect.
4. In the **Password** box, enter the password that this administrator will use to log into HealthStream Connect.
5. In the **Confirm Password** box, reenter the password.
6. In the **Password Reminder** box, enter a password reminder.
7. In the **Email** box, enter an email address.
8. In the **Roles** box, select the Connect Administrator role by checking the desired check box.

9. In the **Affiliation** box, select the administrator affiliation; either **Institution** or **Departments**. If you select **Departments**, then select the check boxes next to the desired departments.

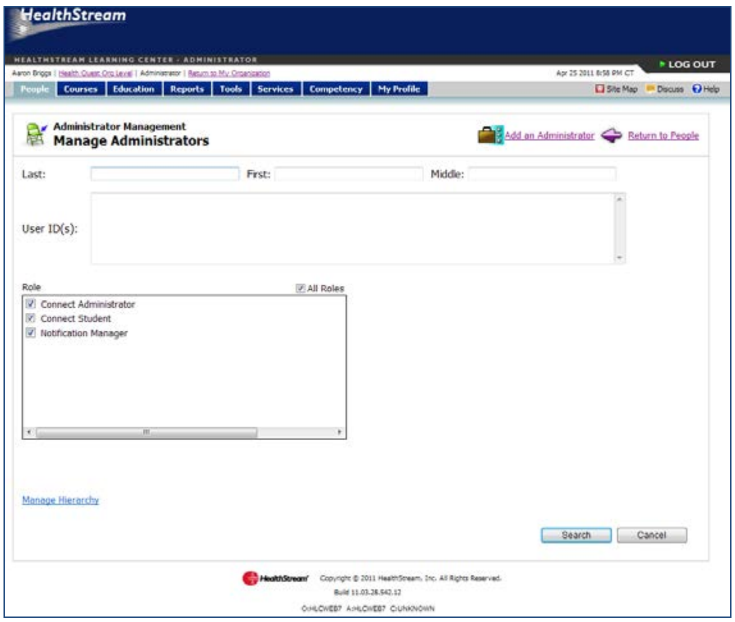
   Note: If you wish to separate administrator access by institution or department, you must work with your Product Integration Manager to import student data into your HealthStream Connect site or manually edit your student records.

10. Click **Save.**

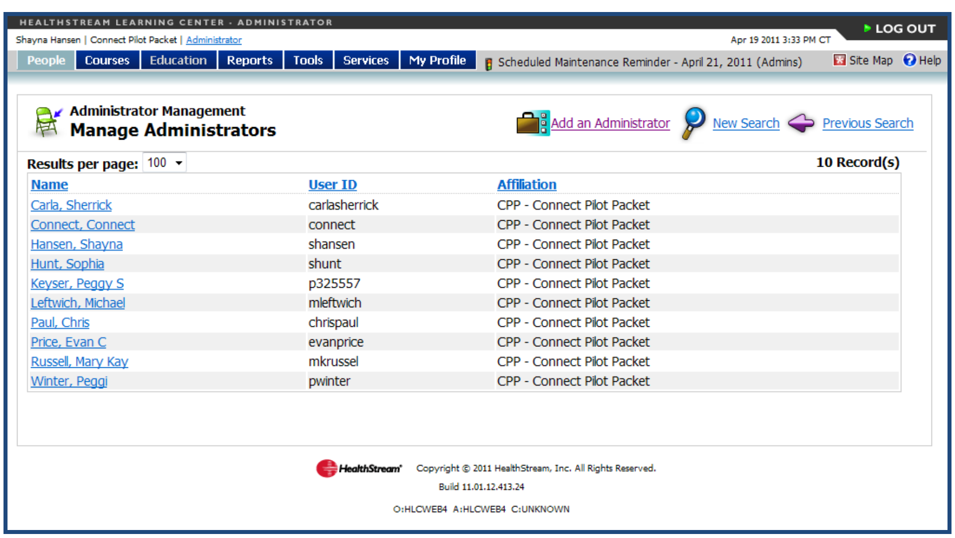
Searching for an Administrator

To search for an administrator

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



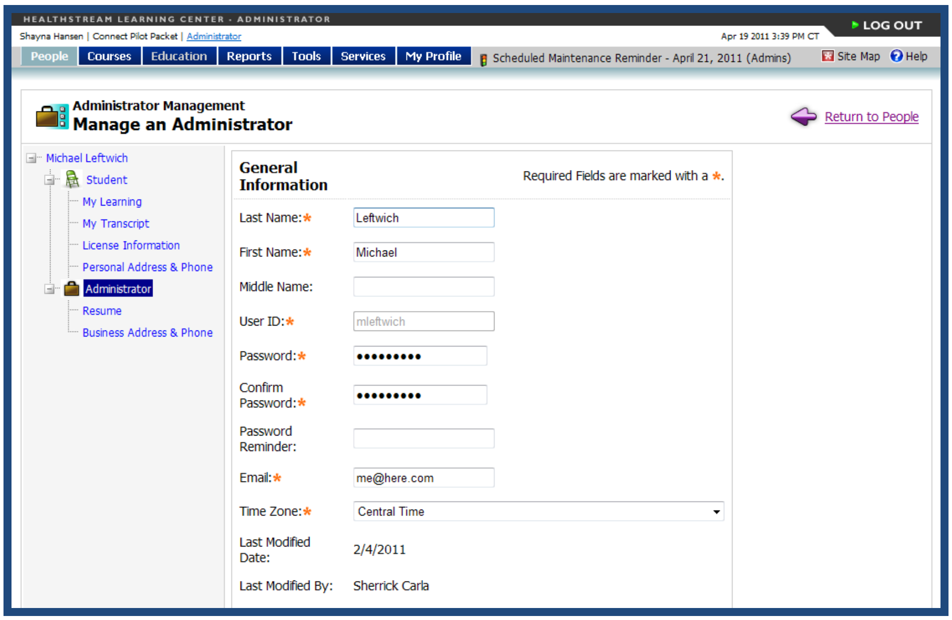
2. Enter search criteria, such as name, User ID or department affiliation.
3. Click **Search**. A listing of administrators matching the search criteria appears.
4. Click the administrator name in the left-hand column to access the administrator record.



Editing an Administrator Record

To edit an administrator record

1. Perform an administrator search. See *Searching for an Administrator* in this document for details on conducting an administrator search.
2. Click the administrator name link. The **Manage an Administrator** page appears.



3. Make the desired edits.
4. Click **Save**.

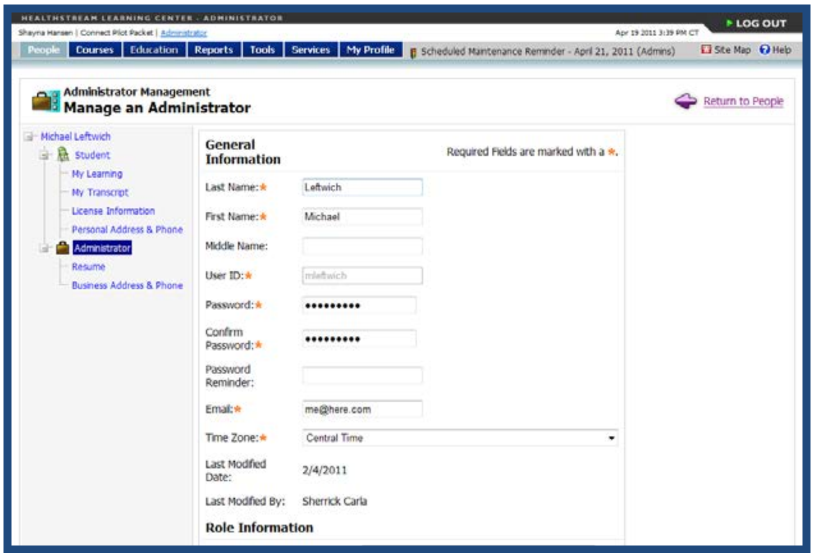
Deleting an Administrator Record

To delete an administrator record

1. Perform an administrator search. See *Searching for an Administrator* in this document for details on conducting an administrator search.

   Note: An administrator cannot delete his or her own administrator role.

2. Click the administrator name link. The **Manage an Administrator** page appears.



3. Click **Delete** at the bottom of the page.

   Note: If the administrator is also a student, deleting the administrator role does not affect student access. To prevent student access to HealthStream Connect, the student role must be inactivated. See *Inactivating/Reactivating a Student* in the *Student Management* user guide.

Adding a Student

New students are added to your HealthStream Connect site automatically when a student accesses a Connect course via your primary LMS. The seamless login setup between your primary LMS and your HealthStream Connect site automatically creates student records in the Connect system.

Once student records are created, course completion data is tracked to these records. Any time a Connect course is launched from your LMS, your LMS passes authentication data to HealthStream Connect. HealthStream Connect uses this data to ensure the course activity is tracked to the appropriate student record.

Student Management

While student records are added automatically to HealthStream Connect when theys launch HealthStream Connect courseware from your primary LMS, you may wish to access student records in HealthStream Connect in order to verify the following, if necessary:

- Student completions in Connect match what is being recorded in your primary LMS.
- Student records are being created successfully from your primary LMS.
- Student Discipline and License Information is recorded correctly in order to issue proper credit for continuing education courses.

While your HealthStream Connect platform includes access to other functions of student management, these functions are **unnecessary and should not be used**. These functions include:

- **Editing student records**
  Editing student records is unnecessary, as student records are managed automatically by the data passed to HealthStream Connect from your primary LMS.
- **Activating and inactivating student records**
  This functionality is unnecessary in HealthStream Connect, as you should manage active and inactive student records through your primary LMS.
- **Adding personal address and phone information to a student record**
  While HealthStream Connect can record address and phone information within a student record, this data serves no purpose. Use your primary LMS to record personal demographic data.
- **Viewing a student's assignments via the My Learning page**
  In the HealthStream Learning Center, the My Learning page is the primary display of a student's assigned and elective learning. However, as a HealthStream Connect user, you will make all assignments via your primary LMS. While you can view a student's My Learning page from the student record, the data here is unnecessary for your purposes.

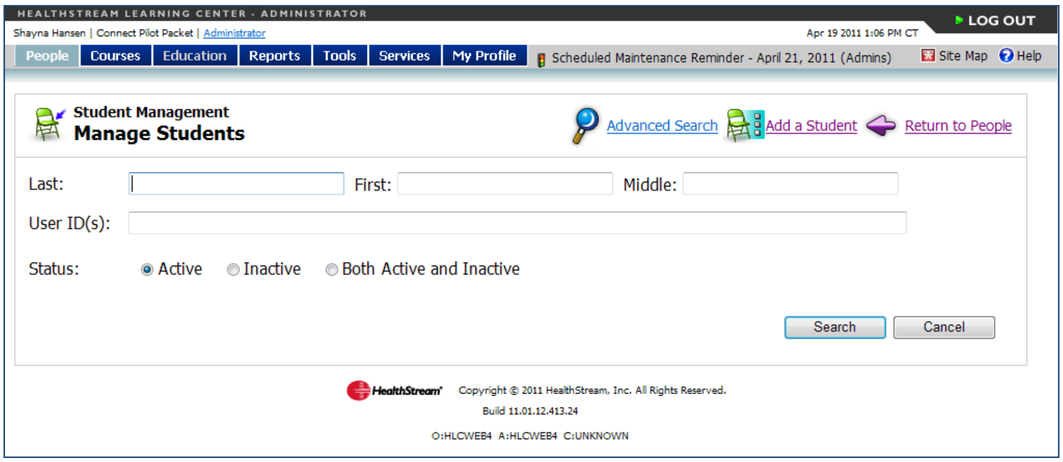
Searching for a Student

To search for a student

1. On the **People** tab, click **Manage Students**.

   Tip: Clicking the **Recent Items** icon displays a list of the ten most recently edited student records.

2. The **Manage Students** page appears.



The **Manage Students** page is divided into two sections. The top half of the page enables searching active and/or inactive students by name or user ID. The bottom half of the page is made visible by clicking **Advanced Search** and is used to further define your student search.

Basic Search

1. Enter the search criteria. You may search for students by last, first, and middle names, user ID(s), and status. There is no minimum number of characters you must enter into a search field. To narrow search results, simply enter more characters in a search field. You may also enter more than one user ID by separating each with a comma.
2. Click **Search**. The page refreshes, displaying matching search results.

3. Click the name link of the desired student.

Advanced Search

1. Click **Advanced Search** to reveal the bottom half of the search page, as shown below.

   This section of the search page gives you the ability to refine your search within departments.

   If you want to search for a specific department, for example, simply clear the **All Departments** check box and select the desired check boxes within the **Department** box.

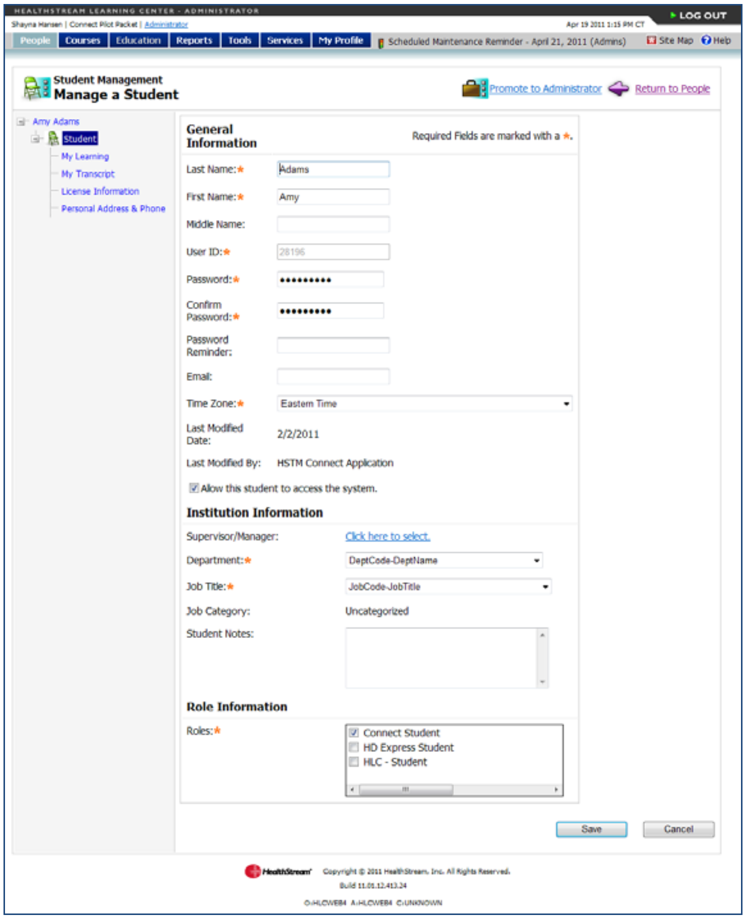
   Note: Department data will not be available unless it is manually entered or if you elect to import student data into the system.

2. Click **Search**. The page refreshes, displaying matching search results.

3. Click the name link of the desired student.

Viewing Student Information

Administrators can view information about students from the student's general information page. To access this page, perform a student search.



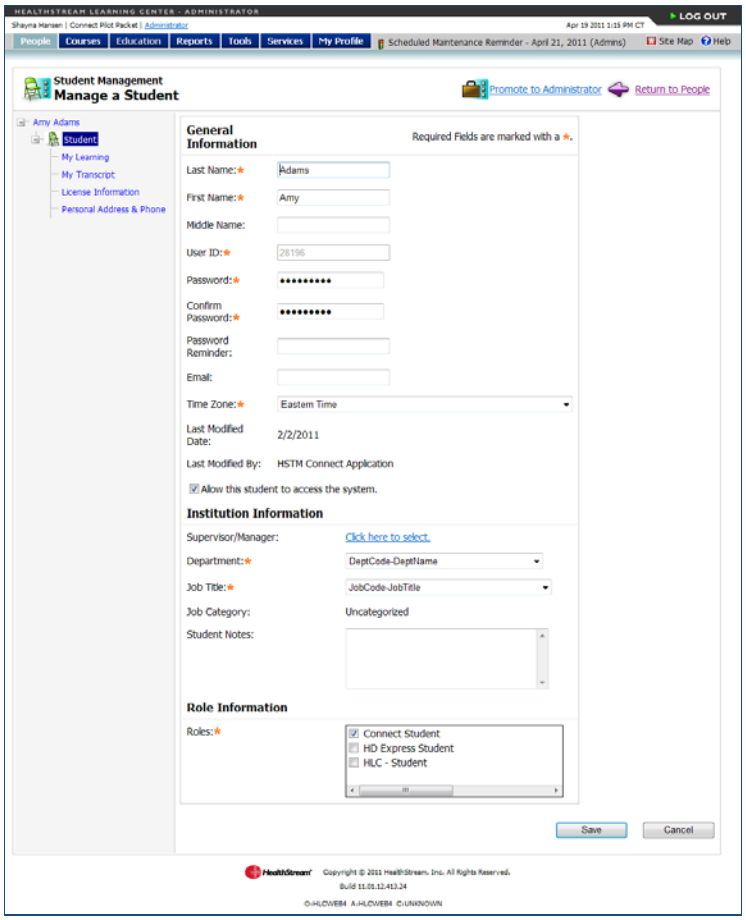
From the student's general information page, you can view the following student information:

- Student Courses
- Student Transcript
- Student Personal Address and Phone

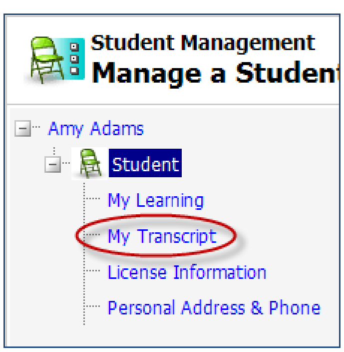
Viewing a Student's Transcript

To view a student's transcript

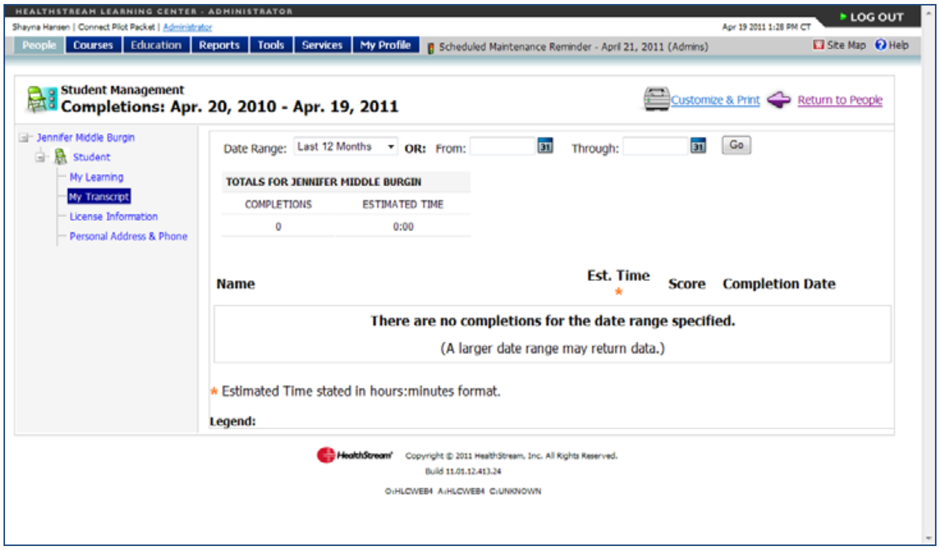
1. Perform a student search. See *Searching for a Student* in this document for details on conducting a student search.
2. Click the name link of the desired student from the list of matching search results. The **Manage a Student** page appears.



3. Click **My Transcript** in the left-hand navigation tree.



The **View Student Transcript** page appears.



The transcript includes five columns:

- *Name* – linked to display CE credit information and certificates
- *Estimated Length* – an estimation of the length of time taken to complete the course (if available) will appear in hrs:mins
- *Score* – if an overall score was calculated for the course
- *Date Awarded* – the date of course completion

Note: If the course includes continuing education (CE) credit for which the student qualified, the CE credit information will be displayed under the course information, including credit type, units, discipline, license number (if stored in the system) and state.

4. The transcript can be narrowed to a specific date range by selecting a date range from the **Date Range** list. The page will refresh to display the date range chosen.
5. The transcript can be customized and printed as a report by clicking **Customize and Print**.

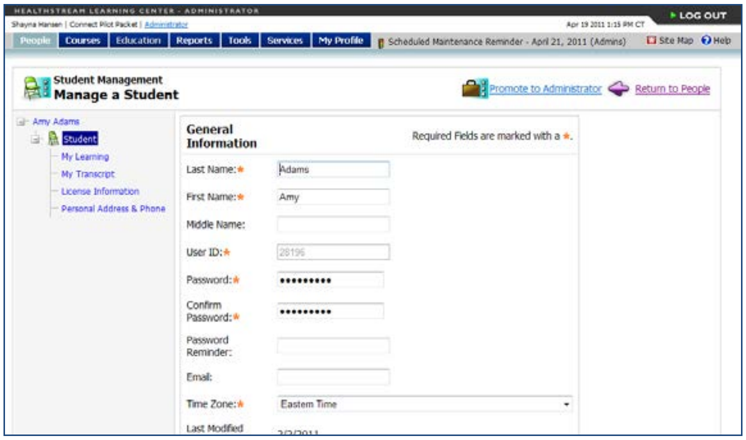
Viewing a Student's License Information

By default, students who are licensed healthcare professionals can store license and discipline information in HealthStream Connect. Storing this information enables the system to issue appropriate CE credit for course completion. To review how students add license information to their HealthStream Connect record, see the *Managing Discipline and License Information* section of this document.

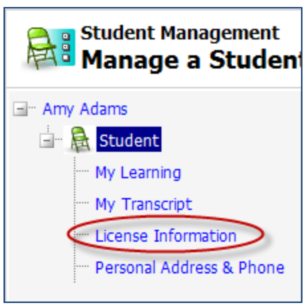
To view a student's license information

1. Perform a student search. See *Searching for a Student* in this document for details on conducting a student search.

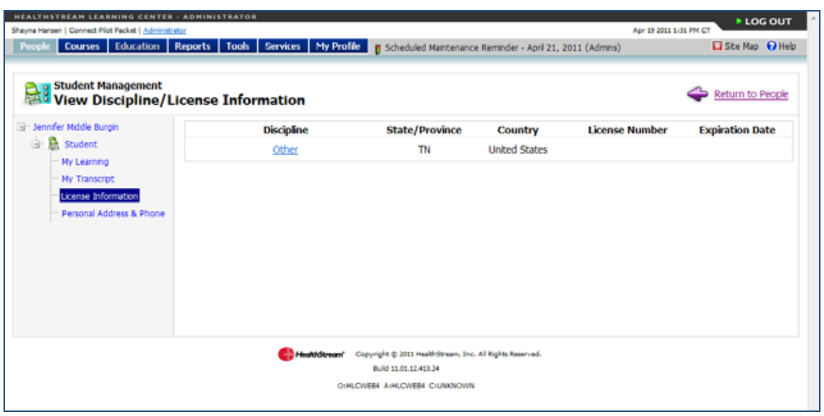
2. Click the name link of the desired student from the list of matching search results. The **Manage a Student** page appears.



3. Click **License Information** from the left-hand navigation tree.



The **View Discipline/License Information** page appears.



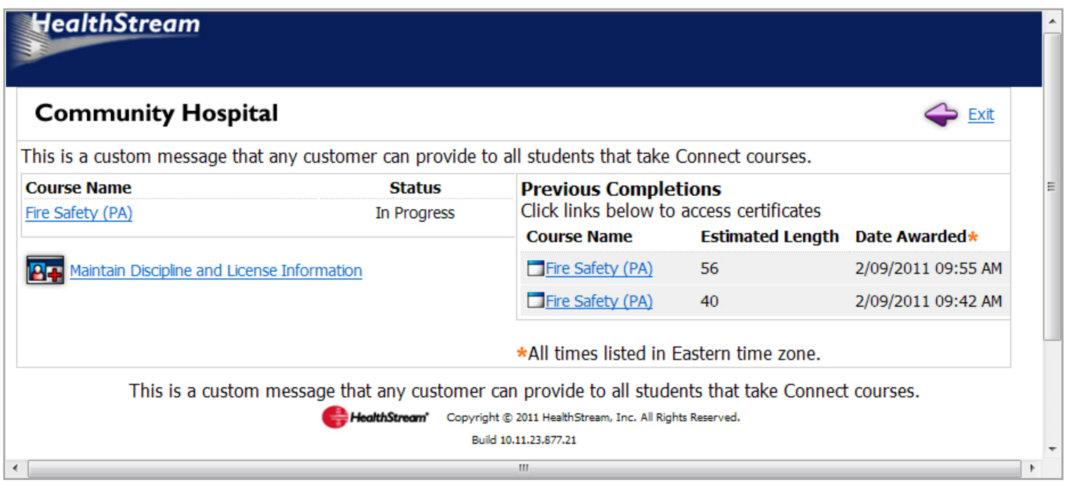
Instructing Your Students to Use HealthStream Connect

For students, the change in user experience when using HealthStream Connect is minimal. The process is designed to add only one step to the process they are used to using with your primary LMS.

HealthStream provides a short Web-based tour of Connect functionality that you may provide to students in advance of assigning Connect courses, if you wish. This tool can be accessed at http://www.healthstream.com/content/training_media/connect_switchboard_page.swf.

The process of utilizing HealthStream Connect for students works as follows:

1. The student accesses the assignments you make via your primary LMS.
2. If the student is accessing HealthStream Connect courseware for the first time, a user account is created in the Connect site. The primary LMS passes basic student data to HealthStream, including the student's name and user ID.
3. The HealthStream Connect switchboard page displays to the student in a new window. This page displays:
   - Your organization's name
   - A message, which can be customized to your organization.
   - The title of the course.
   - The status of the course.
   - A list of the student's previous course completions.
   - A link to maintain displine and license information.



1. The student clicks the course name to view the course.
2. HealthStream Connect communicates the course status to the primary LMS. The course status is set as In Progress.
3. The student interacts with the course and generates a status by exiting, completing, passing, or failing the course (depending on the course design).
4. The course status is recorded in the HealthStream Connect site.
5. HealthStream Connect communicates an updated status back to the primary LMS relative to the structure of that course and how the student terminated the course. The primary LMS updates student's course status accordingly.

In informing your students to use HealthStream Connect, you may wish to:

- Notify them of the HealthStream Connect switchboard page, which will display in advance of their Connect course. They must click the Course Name on the Switchboard page to begin their course.
- Notify them that they can click the Maintain Discipline and License Information link to store details about their professional licensure status. This information can be used to issue appropriate credit for continuing education courses. Refer to the Managing Discipline and License Information section below.
- Notify them that they can view their previous completions and click any Course Name in this section to access relevant certificates related to their creation.

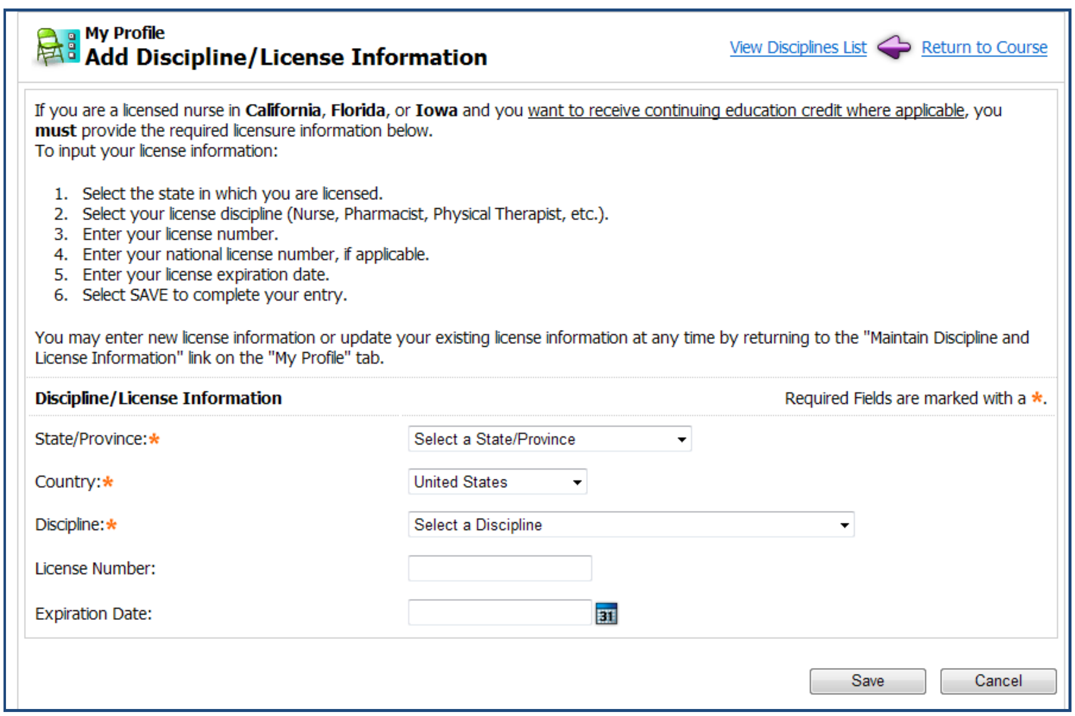
Managing Discipline and License Information

The Discipline and License Information area allows details about professional licensure status to be stored so that that HealthStream Connect can issue appropriate credit for continuing education courses. Students accessing HealthStream Connect courseware can input and manage information for one or more licenses.

On the Connect Switchboard page that displays in advance of the Connect Course, the student will click **Manage Discipline and License Information** to view the **Discipline/License Information** page.

To add information for a professional license

1. On the **View Discipline/License Information** page, click **Add Discipline/License**. The **Add Discipline/License** page appears.



2. In the **State** list, select the state in which you are licensed.

   Note: If you are licensed in another country, select that country from the list (the default is United States) before selecting the state or province from the State list.

3. In the **Discipline** list, select your license discipline.

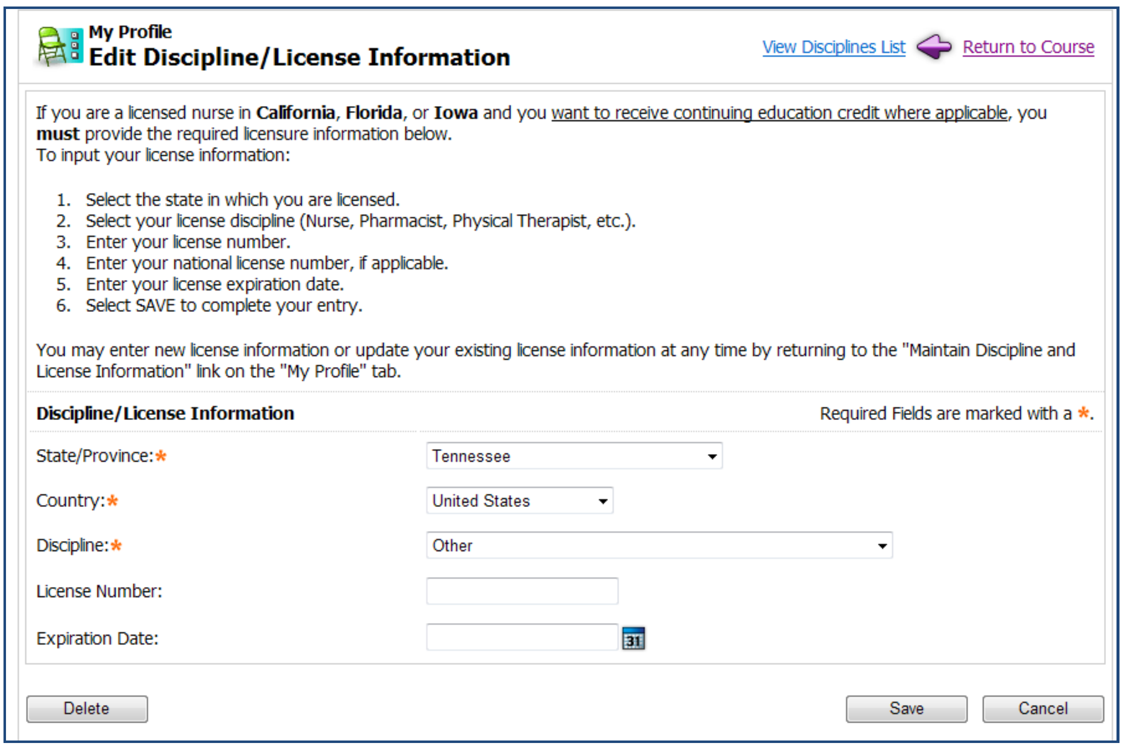
4. In the **License Number** box, enter your license number.
5. In the **Expiration Date** box, enter the expiration date of your license.

   Note: Although **License Number** and **Expiration Date** are not required fields, some CE accrediting/approving bodies require this information on CE certificates. For your license number and/or expiration date to appear on certificates you have earned for CE course completion, you must enter your license number and/or license expiration date.
6. Click **Save** to save your license information to the system.

If you have more than one professional license, you can click **Add Discipline/License** and follow the steps above to enter another license.

To edit existing license information

1. On the **View Discipline/License Information** page, click the discipline name. The **Edit Discipline/License** page appears.



2. Make the desired changes.
3. Click **Save**. The system returns to the **View Discipline/License Information** page with the revisions to the previously selected license now displayed.

To delete existing license information

1. On the **View Discipline/License Information** page, click the discipline name. The **Edit Discipline/License** page appears.
2. Click **Delete**. A confirmation prompt appears.
3. Click **OK**. The system returns to the **View Discipline/License Information** page with the previously selected license now deleted from the list.

   Note: Deleting a license deletes CE credit for prior course completion.

Annotations Management

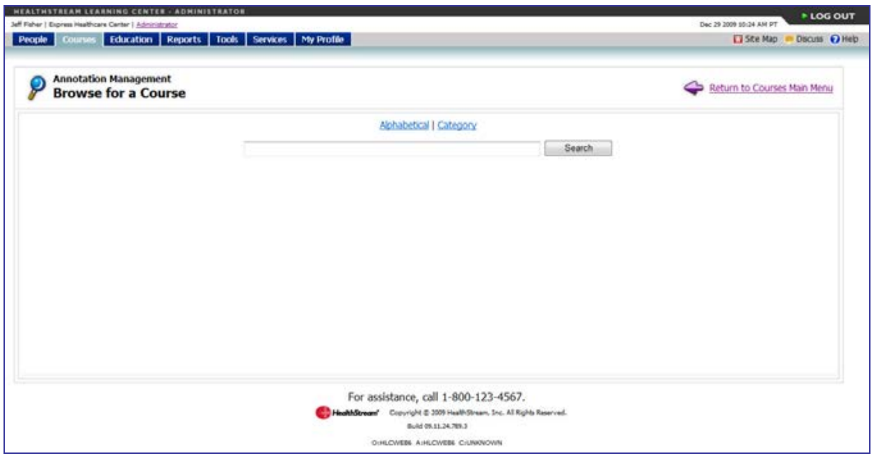
Annotations are electronic notes that can be added to pages within **HealthStream regulatory course** online content. They are used to customize course content by adding institution or department-specific information. Annotations display as a separate pop-up window over the selected online page.

Note: Annotations are only available for use with the HealthStream regulatory courses. If you are not using Connect to assign HealthStream regulatory courses, this guide is not applicable to you.

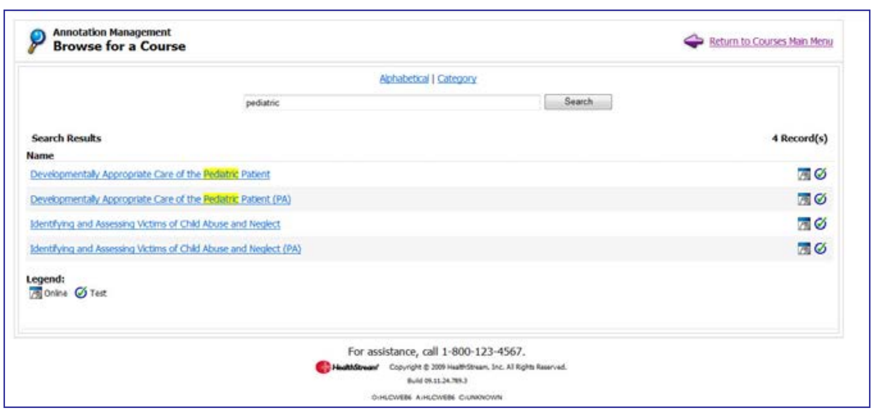
Adding an Annotation

To add an annotation

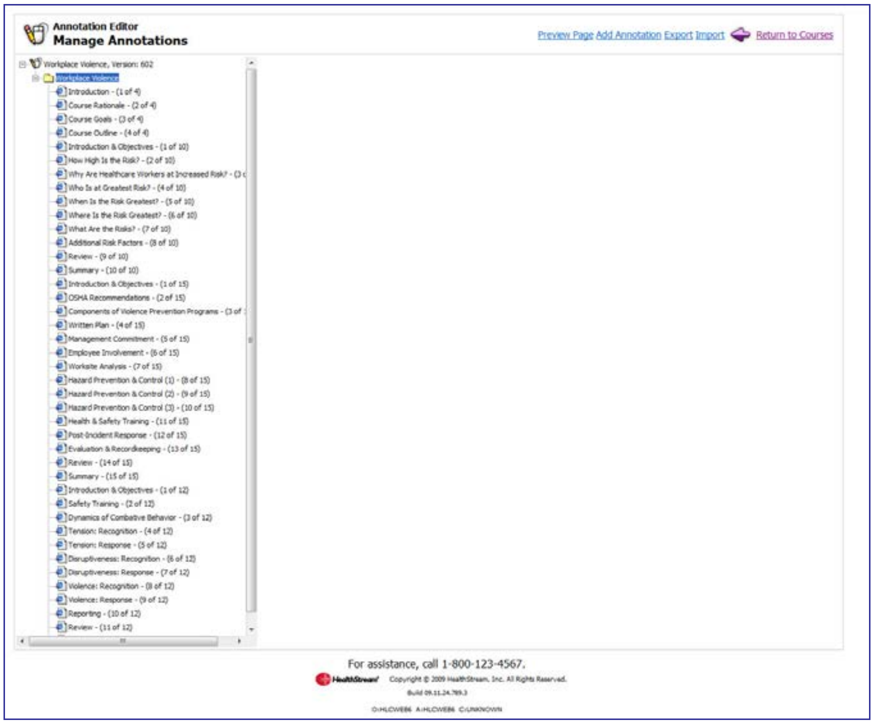
1. On the **Courses** tab, click **Add Course Annotation**. The **Browse for a Course** page appears.



2. Search for the desired HealthStream regulatory course. A listing of all courses matching your search criteria appears.

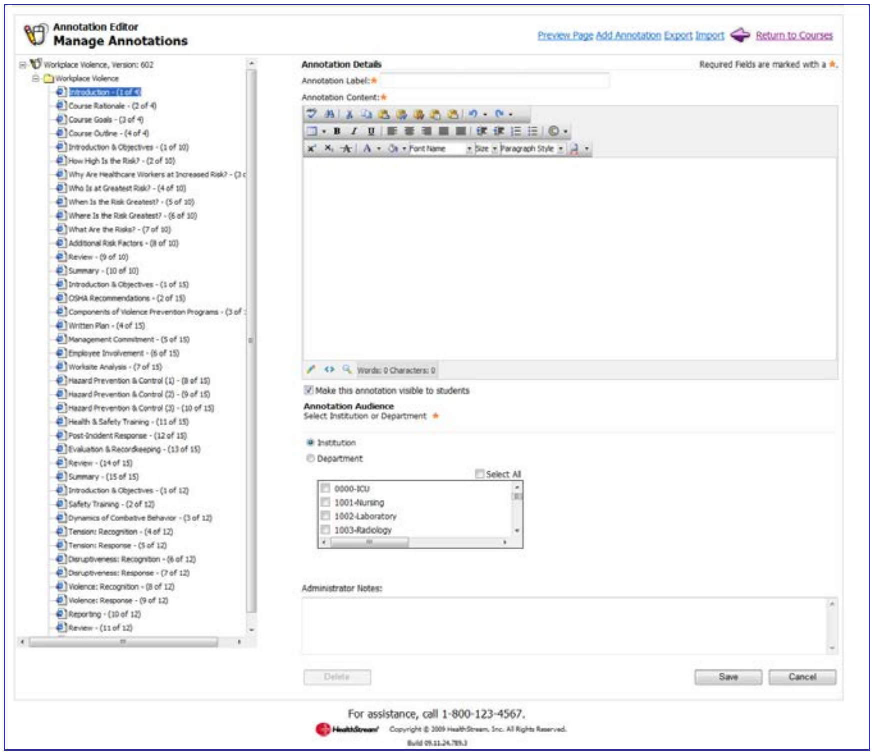


3. Click the name link of the course you wish to annotate. A listing of all online content pages appears in the left-hand navigation window of the **Manage Annotations** page.



4. Click the name link of the page you wish to annotate. To preview the page, click **Preview Page**. A preview of the page displays as a secondary pop-up window.

5. Click **Add Annotation**. The page refreshes and the Annotations tools appear.



An orange asterisk (**) indicates a required field.

6. In the **Annotation Label** box, enter a label for the annotation.
7. In the Annotation Content box, create the content for the annotation using the WYSIWYG editor. (See *Using the WYSIWYG Editors* in the online Help system.) Text and images may be added.
8. The **Make this annotation visible to students** check box is clicked by default. Clearing this box inactivates the annotation.
9. Click **Institution** or **Department** to select the annotation audience. If you clicked **Institution**, then all students viewing the online content will see the annotation. This is the default and standard selection with HealthStream Connect.

Note: It is possible to create annotations that are specific to certain **Department** or **Job Categories.** To do so, contact your HealthStream support service, implementation specialist, or account representative to discuss a data import of your student records.

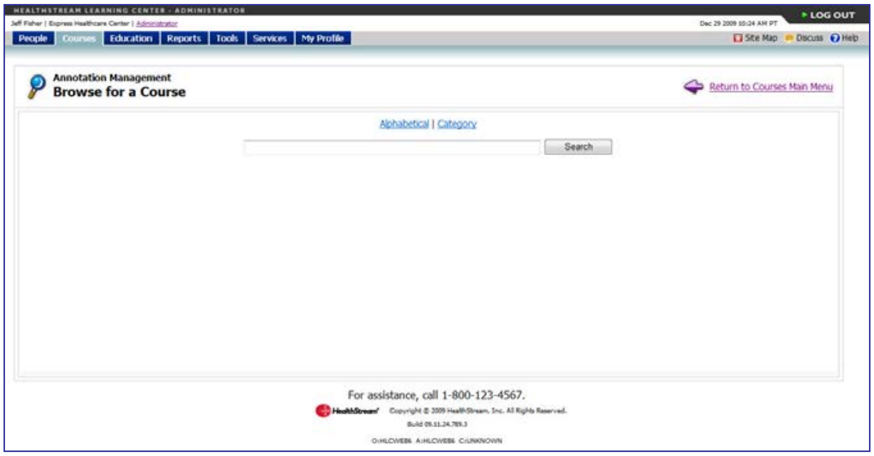
10. In the **Administrator Notes** box, add any notes, if desired.
11. Click **Save**. Once the annotation is saved, a yellow sticky note will be attached to the online page in the left-hand navigation window.

Note: If you wish to add more than one annotation to a single page, you may do so. The text for each annotation will appear on a single annotation pop-up.

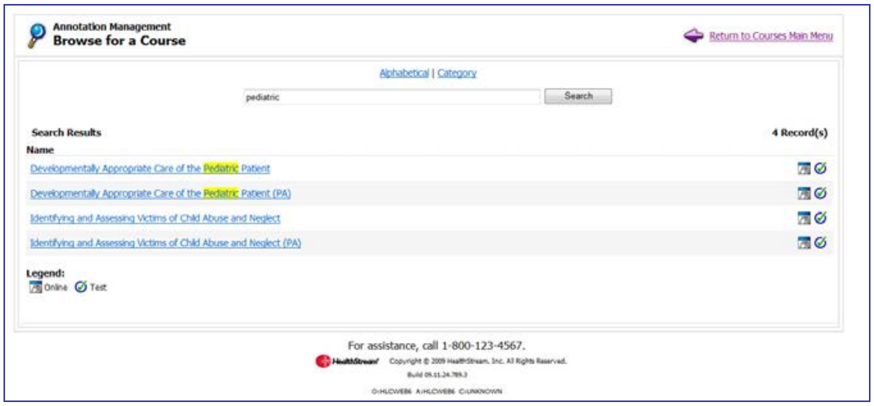
Searching for an Annotation

To search for an annotation

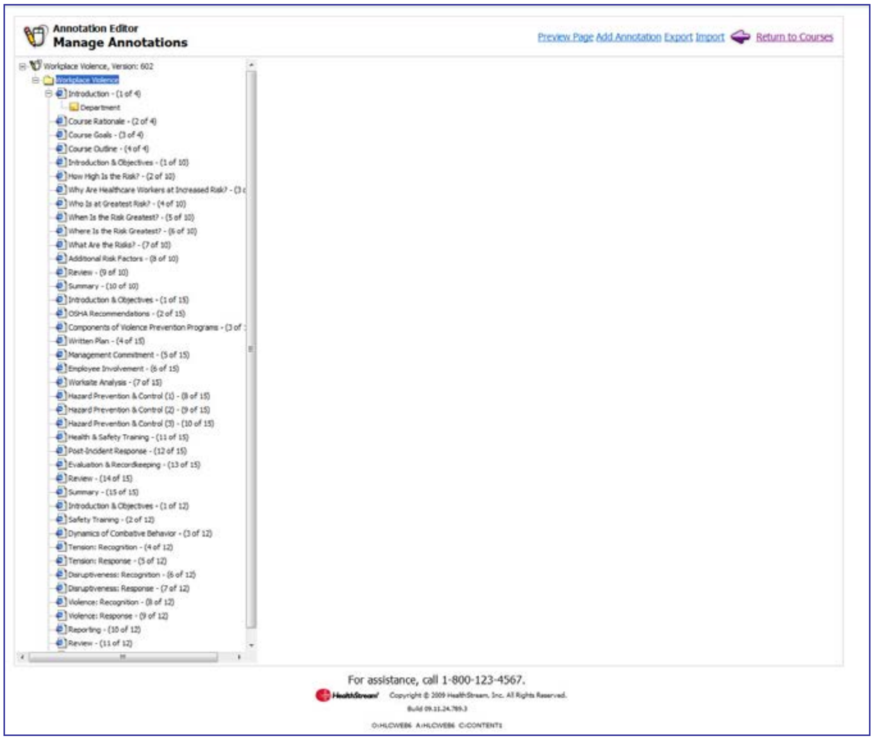
1. On the **Courses** tab, click **Manage Course Annotations**. The **Browse for a Course** page appears.



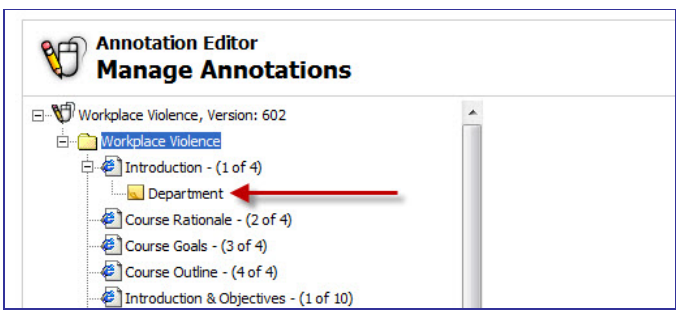
2. Search for the course in which the annotation resides. A listing of all courses matching your search criteria appears.



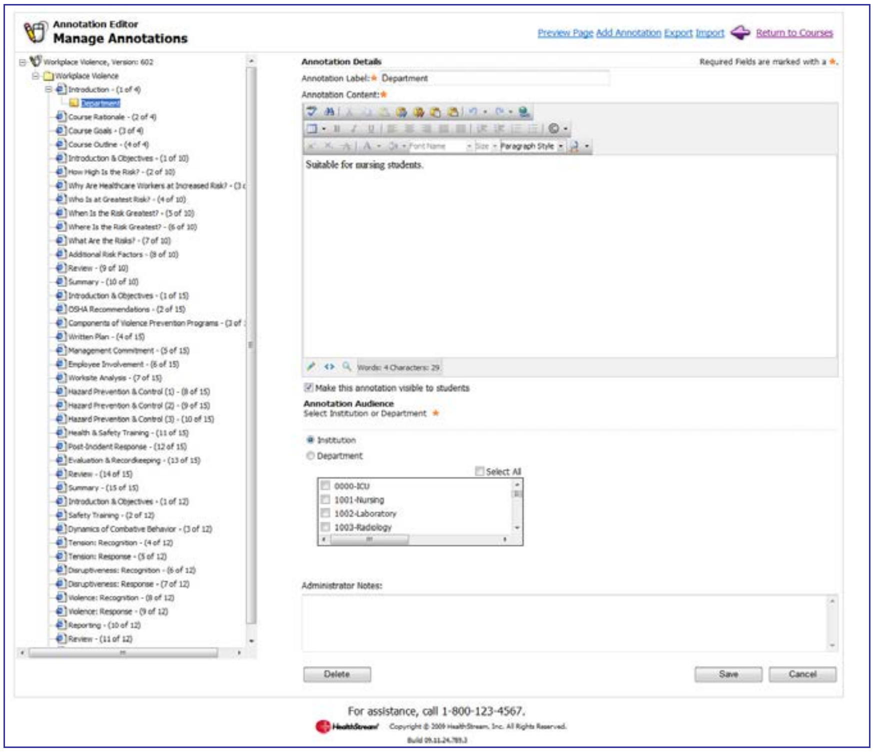
3. Click the name link of the desired course. A listing of all online content pages appears on the left of the **Manage Annotations** page.



4. Click the annotation icon (yellow sticky note) to display the desired annotation.



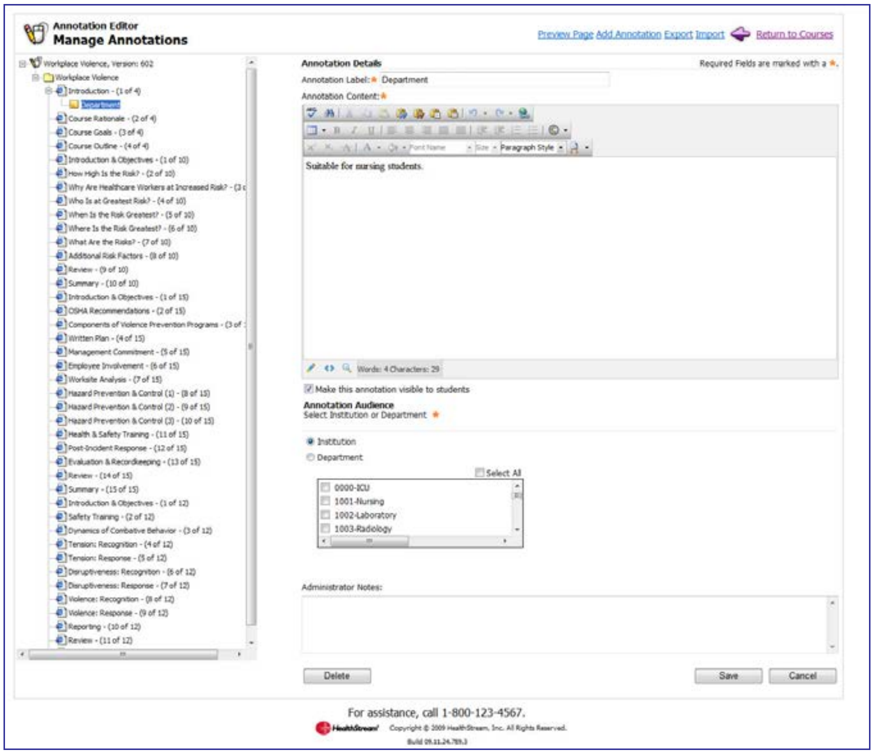
5. The selected annotation displays on the right side of the **Manage Annotations** page.



Editing an Annotation

To edit an annotation

1. Search for the annotation you want to edit. See *Searching for an Annotation* in this document for details on conducting an annotation search. The **Manage Annotations** page appears.



An orange asterisk (***) indicates a required field.

2. Make the desired edits.

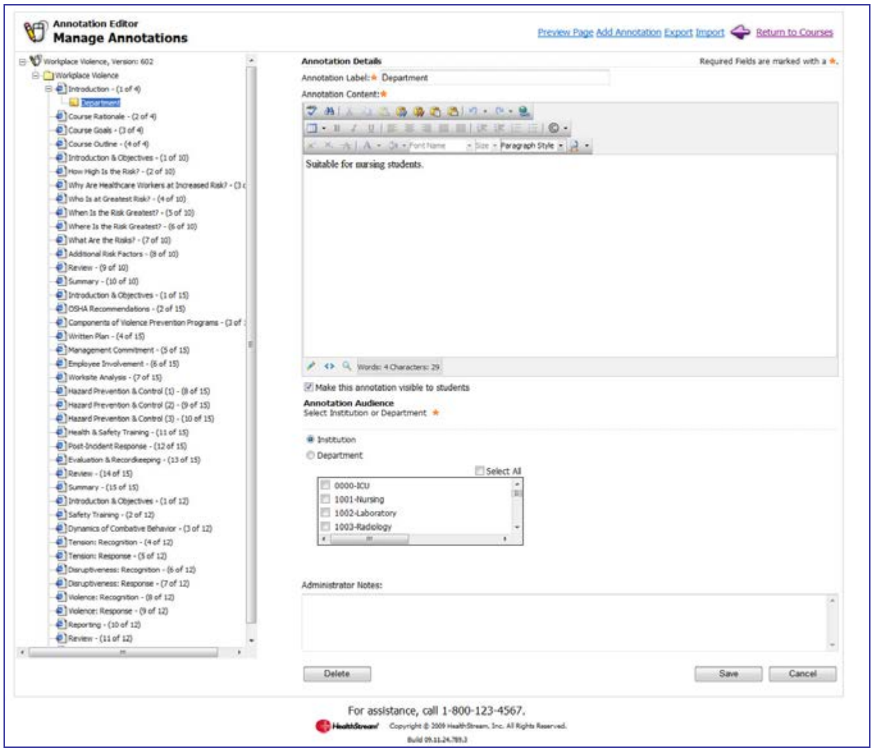
   Note: You may clear the **Make this annotation visible to students** check box if you do not want the annotation to be visible to students as they view the online content.

3. Click **Save**.

Deleting an Annotation

To delete an annotation

1. Search for the annotation you want to delete. See *Searching for an Annotation* in this document for details on conducting an annotation search. The **Manage Annotations** page appears.



2. Click **Delete**. A confirmation prompt appears.
3. Click **OK** to delete the annotation.

Exporting and Importing Annotations

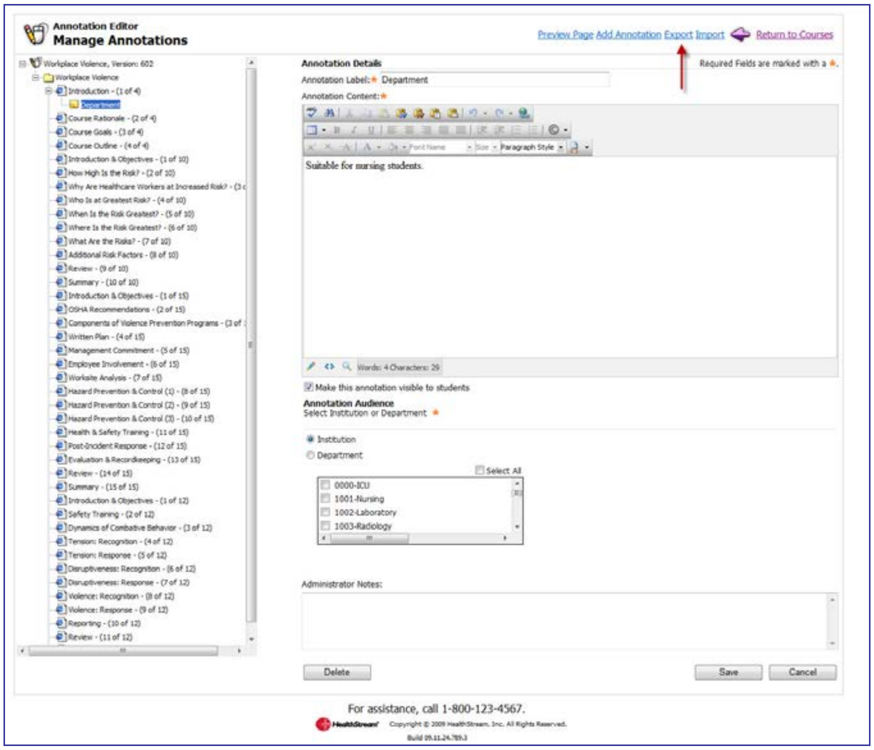
Annotations created in one version of a HealthStream regulatory course can be exported (saved) outside HealthStream Connect and then imported into another version of the course.

Note: To move annotations from one course version to another, you must export the annotations from the current active course version prior to publishing the new course version.

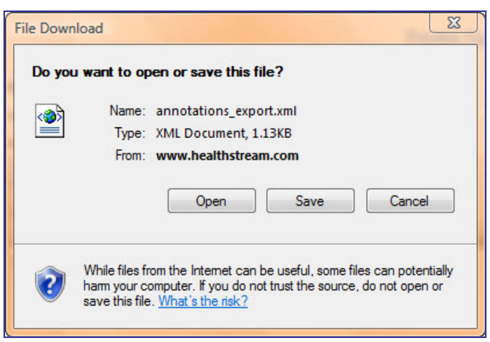
Exporting Annotations

To export annotations

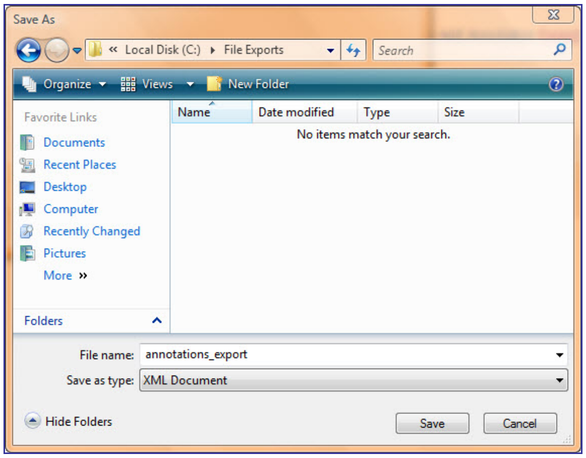
1. Search for the annotations you want to export. See *Searching for an Annotation* in this document for details on conducting an annotation search. The **Manage Annotations** page appears. The navigation tree in the left-hand side outlines each course page. Existing annotations are represented by a yellow note icon attached below the corresponding page.



2. Click **Export**. The **File Download** prompt appears.



3. Click **Save**. The **Save As** dialog appears.



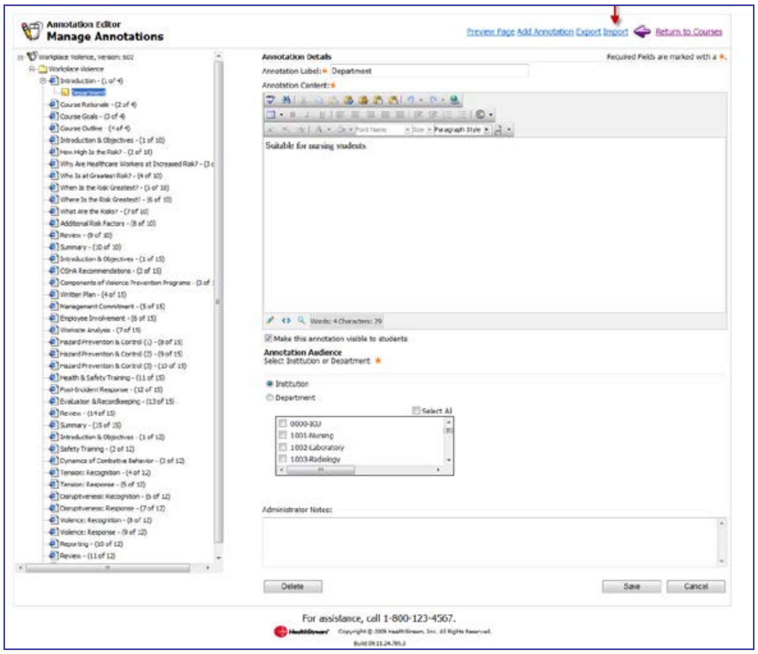
4. Select a desired location, for example, your desktop, to save the annotations file. The file format is .XML. You may rename the file prior to saving, but must preserve the .XML file extension.
5. Click **Save**. The file containing the course annotations is now available for import into another course.

Importing Annotations

Note: In order to import annotations into the new course version, you will first need to publish the new course version to your HLC. (See *Publishing Updated Versions of HealthStream Regulatory Courses* in the *Connect Courses Management* user guide.)

To import annotations into another course

1. Search for the course into which you want to import the annotations. See *Searching for an Annotation* in this document for conducting an annotation search. The **Manage Annotations** page appears. The navigation tree in the left-hand side outlines each course page.



2. Click **Import**. The **Load Import File** page appears.

3. Browse from the file location, for example, your desktop, for the .XML annotations file you wish to import into the course. Once the file is located, the **Load Import File** page refreshes, displaying the path to the file in the **File to import** box.
4. Click **Load**. A report will generate displaying the annotations within the file.
5. Click the annotations to review their contents.
6. Map the annotations to the appropriate new course page by dragging the annotations into place.

   Note: Unmapped annotations will not be imported.

7. Click **Continue**. The **Manage Annotations** page appears for the new course. From here, you can create additional annotations, change the target audience, and make any other desired annotation edits. Annotations are now visible to students within the annotations' targeted audience.

   Note: You may also export annotations and import them into another, unrelated course if desired.

Reports

Tip: You may use Alt+R to access Reports via your computer keyboard.

HealthStream Connect offers several reports. These are divided into groups based on the Connect tab they most closely represent. Reports will open in a new window. Several reports allow for scheduling and alternative formats, such as PDF, and Excel.

Report Viewer

The **Report Viewer** appears whenever a report is generated. Using the **Report Viewer**, you have the following options:

- Save the report locally to your computer or network drive
- Print the report

Copy the report web address (URL) and share (for example, via email)

People Reports

The following reports are available from the **People Reports** section of the **Reports** tab:

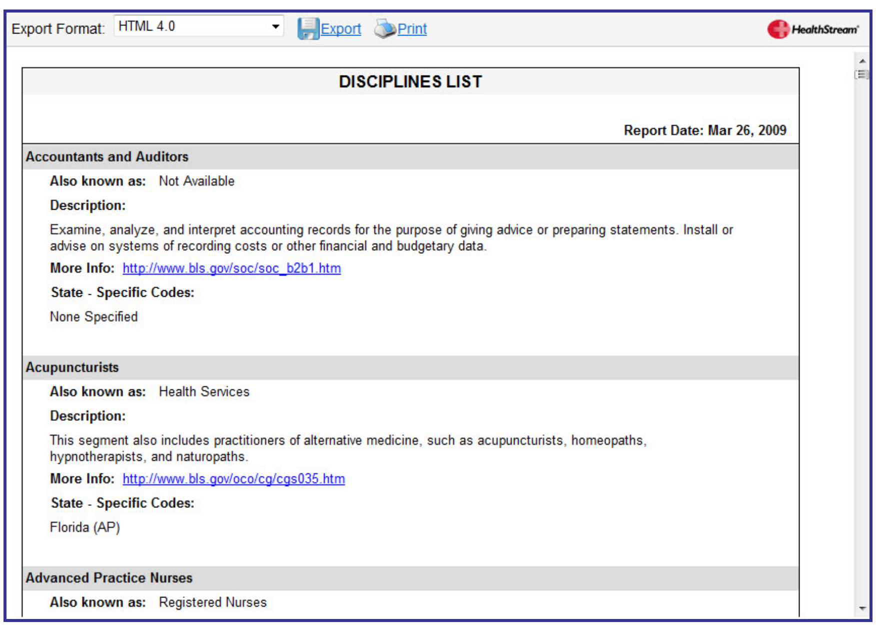
- Discipline Listing Report
- Expiring License Report
- Student and Group Transcript Report
- Student Listing Report

Discipline Listing Report

The Discipline Listing report lists all licensure disciplines used in the HLC. This listing is not configurable. It is available by default for administrators and students (under the **My Profile** tab).

To create a report

From the **Reports** tab, click the **Disciplines Report** link. The **Disciplines Report** appears.


Export Format: HTML 4.0 Export Print

DISCIPLINES LIST

Report Date: Mar 26, 2009

Accountants and Auditors

Also known as: Not Available

Description:

Examine, analyze, and interpret accounting records for the purpose of giving advice or preparing statements. Install or advise on systems of recording costs or other financial and budgetary data.

More Info: http://www.bls.gov/soc/soc_b2b1.htm

State - Specific Codes:

None Specified

Acupuncturists

Also known as: Health Services

Description:

This segment also includes practitioners of alternative medicine, such as acupuncturists, homeopaths, hypnotherapists, and naturopaths.

More Info: http://www.bls.gov/oco/cg/cgs035.htm

State - Specific Codes:

Florida (AP)

Advanced Practice Nurses

Also known as: Registered Nurses

Timing	Formats
Real-time	HTML Adobe PDF Microsoft Excel

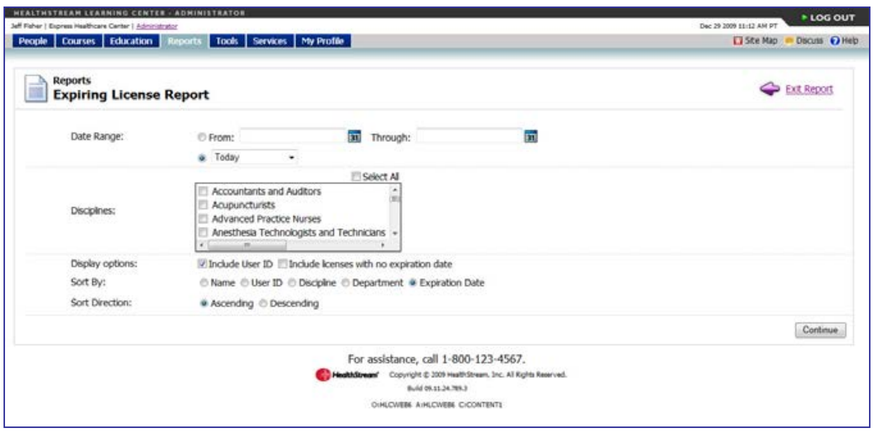
Expiring License Report

The Expiring License report lists students whose license(s) are expired or about to expire. The report includes all students for the administrator's affiliation (for example, institution or allocated departments).

Note: Data for this report is pulled from the **License/Discipline Information - Expiration Date** field entered by the student. The license expiration date is not a required field for license/discipline information. This data will not be available unless entered manually or provided via student data import.

To create a report

1. From the **Reports** tab, click the **Expiring License** link. The **Expiring License Report** page appears.



2. Enter a **Date Range** by typing in specific dates (or using the calendar icon to browse for dates), or select a relative date range from the drop-down menu.
3. Select individual **Disciplines** to include on the report by clicking the checkbox next to each, or select all disciplines by clicking the checkbox next to **Select All**.
4. Select from the available **Display Options**: Include User ID.
5. Select to **Sort By** Name, User ID, Discipline, Department, or Expiration Date (default) by clicking a radio button next to one of the options.
6. Select a **Sort Order** by clicking the radio button next to **Ascending** or **Descending**.
7. Click the **Continue** button. The report appears in a new window.

Timing	Formats	Related Reports
Current as of 12 a.m. EST	HTML Adobe PDF Microsoft Excel	Discipline Listing

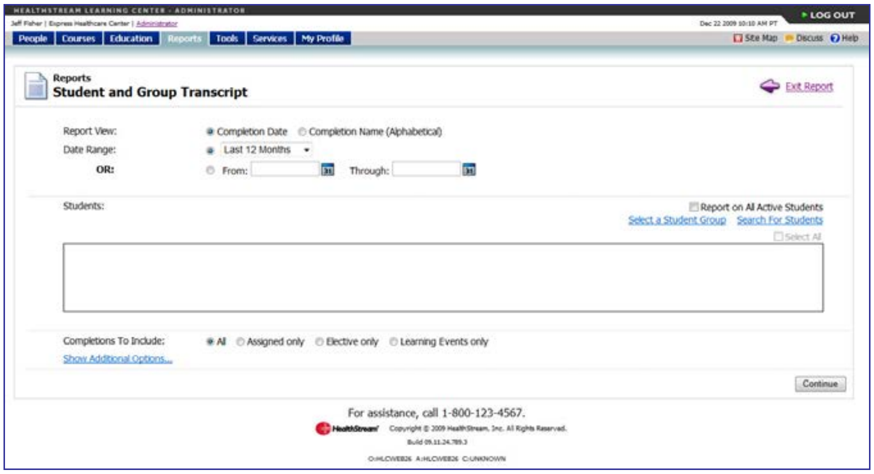
Student and Group Transcript Report

The Student and Group Transcript report generates one or more student transcripts with the option to include active and inactive students.

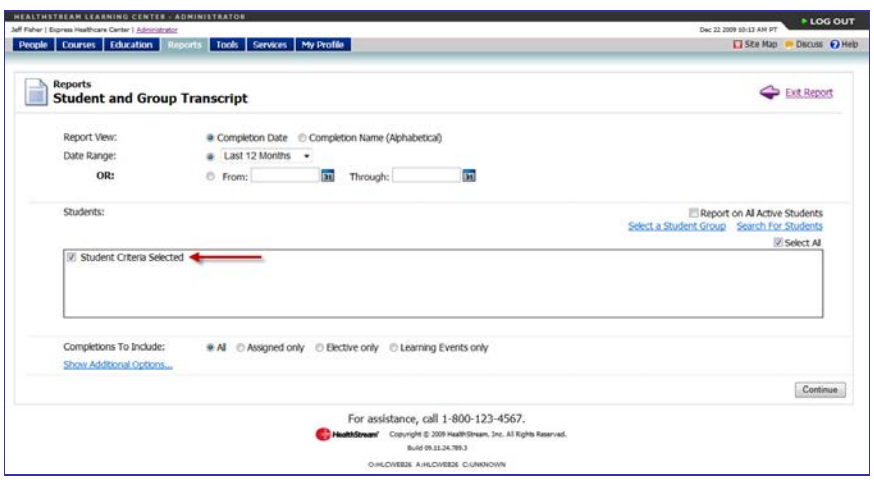
To create the report

1. On the **Reports** tab, click **Student and Group Transcript Report**. The **Student and Group Transcript** page appears.

   Tip: This report is also accessible by clicking **My Transcript** from the left-hand navigation tree of a student's **General Information** page.



2. In **Report View**, click **Completion Date** or **Completion Name (Alphabetical)**.
3. In the **Date Range** list, select the range of dates that you want to use in the report. You can select the date range from the list, or enter the dates in the **From** and **Through** boxes. The default is **Last 12 Months**.
4. In **Students**, select the **Report on All Active Students** check box.



Note: If you search for and select specific students for the report and use the current report configuration for future scheduled reports, only those students selected in the original configuration will be included.

5. In **Completions To Include**, click **All**. HealthStream Connect does not allow filtered reporting based on the other available options.
6. Click **Continue**. The report will open in a secondary window.

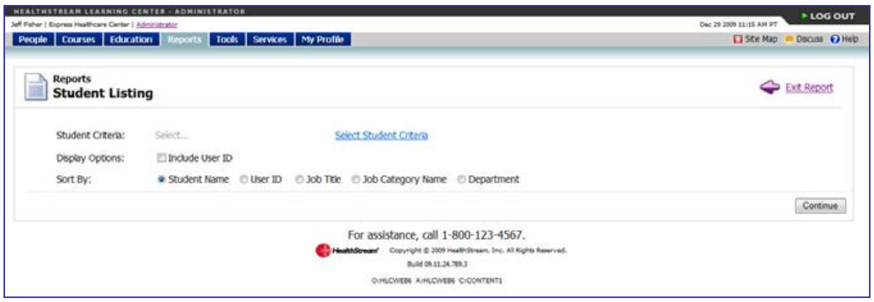
Timing	Formats	Related Reports
Real-time	HTML	Course Completion - Schedulable

Student Listing Report

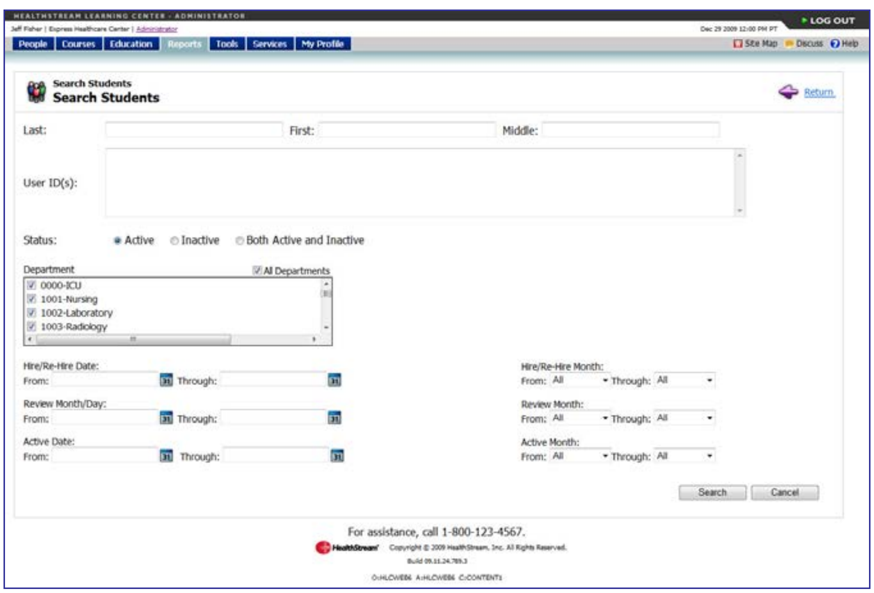
The Student Listing report displays all students based on selected criteria.

To create the report

1. On the **Reports** tab, click **Student Listing**. The **Student Listing** page appears.

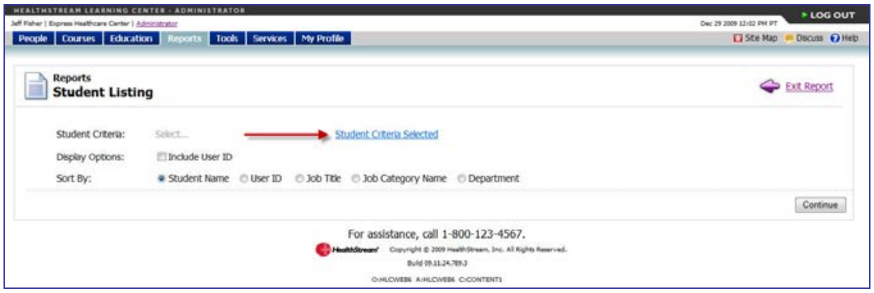


2. Click **Select Student Criteria** to select the students for the report. The Search Students page appears.



3. Enter search criteria.

4. Click **Search**. You are returned to the **Student Listing** page where the phrase *Student Criteria Selected* now appears next to **Student Criteria**.



Note: If you search for and select specific students for the report and use the current report configuration for future scheduled reports, only those students selected in the original configuration will be included.

5. In **Display Options**, select the **Include User ID** check box if you want to include the students' user IDs in the report.
6. In **Sort By**, select **Student Name** (default), **User ID**, **Job Title**, **Job Category Name**, or **Department**.

Note: Job Title, Job Category Name, and Department data will not be available unless entered manually or provided via student data import. You may wish to Sort By Student Name or User ID.

7. Click **Continue**. The report appears in a new window.

Timing	Formats	Related Reports
Real-time	HTML CSV	Student and Group Transcript

Course Reports

The following reports are available from the **Course Reports** section of the **Reports** tab:

- Annotations Report
- Course Listing Report
- Expiring Courses Report

Annotations Report

The Annotations report provides a view of annotations for one or more courses. You can view active annotations, inactive annotations, or both. The report shows all annotations whether they're institution-wide, department-specific or job category specific.

To create the report

1. On the **Reports** tab, click **Annotations**. The **Course Annotations** page appears.

2. Click **Select Courses** to select one or more courses to appear on the report. Only courses that can be annotated can be selected. See *Searching for Courses for a Report* in this document. You are returned to the **Course Annotations** page with the names of the courses that you selected in the **Courses** box.

3. In **Annotations to Include**, select **Active**, **Inactive**, or **Both**.
4. Click **Continue**. The report appears in a new window.

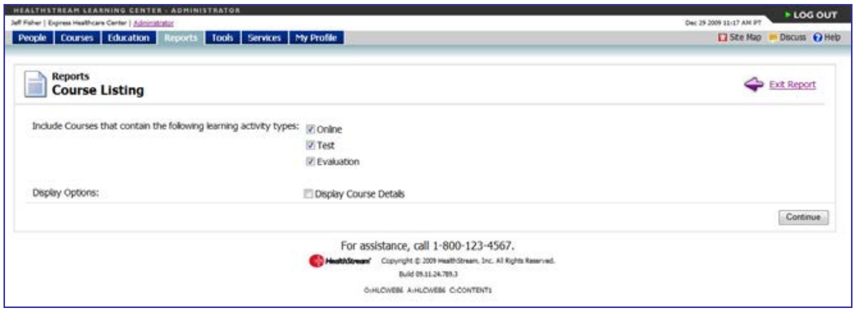
Timing	**Formats**	**Related Reports**
Real-time	HTML	Course Listing

Course Listing Report

The Course Listing report displays a printable list of all courses active in HealthStream Connect, with the option to filter courses that contain specific types of learning activities.

To create the report

1. On the **Reports** tab, click **Course Listing**. The **Course Listing** page appears.



2. In **Include courses that contain the following learning activity types**, all learning activity types are checked by default. Clear any of these check boxes to filter the report, but at least one must be selected.
3. In **Display Options**, select the **Display Course Details** check box if you wish to see the details of the course.
4. Click **Continue**. The report appears in a new window.

Timing	Formats	Related Reports
Real-time	HTML Adobe PDF Microsoft Excel	Expiring Courses

Expiring Courses Report

The Expiring Courses report displays a list of courses that are set to expire between the next 30 days to the next 365 days. This includes third party content that has a contract and expiration date.

To create the report

1. On the **Reports** tab, click **Expiring Courses**. The **Expiring Courses** page appears.

2. In **Date Range**, select **30 days**, **60 days**, **90 days**, **180 days**, or **1 Year.**
3. In **Sort By**, select **Course Name** or **Expiration Date**.
4. Click **Continue**. The report appears in a new window.

Timing	Formats
Real-time	HTML Adobe PDF Microsoft Excel

Education Reports

The following report is available from the **Education Reports** section of the **Reports** tab:

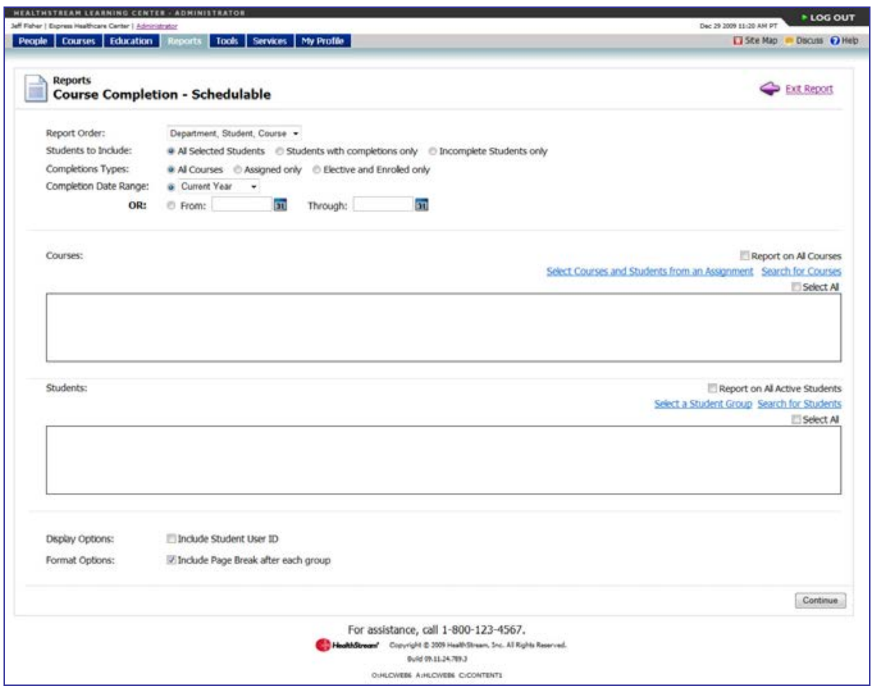
Course Completion - Schedulable

Course Completion – Schedulable Report

The Course Completion – Schedulable report lists students who have completed any of the selected learning items or lists all students regardless of their completion status.

To create the report

1. On the **Reports** tab, click **Course Completion – Schedulable**. The **Course Completion – Schedulable** page appears.

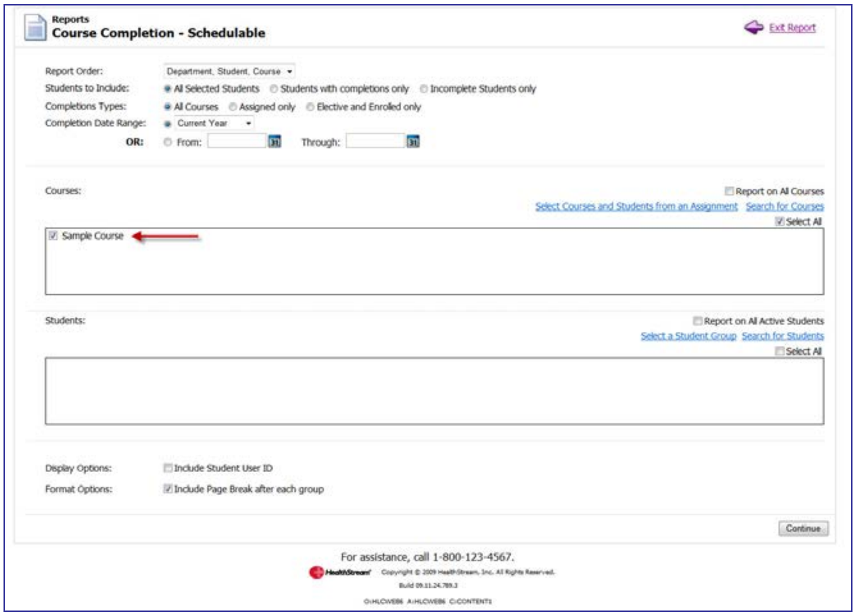


2. In the **Report Order** list, select the order in which you want the data to appear in the report.
3. In **Students to Include**, select **All Selected Students**, **Students with completions only**, or **Incomplete Students only**.
4. In **Learning to Include:**, select **All Learning.**

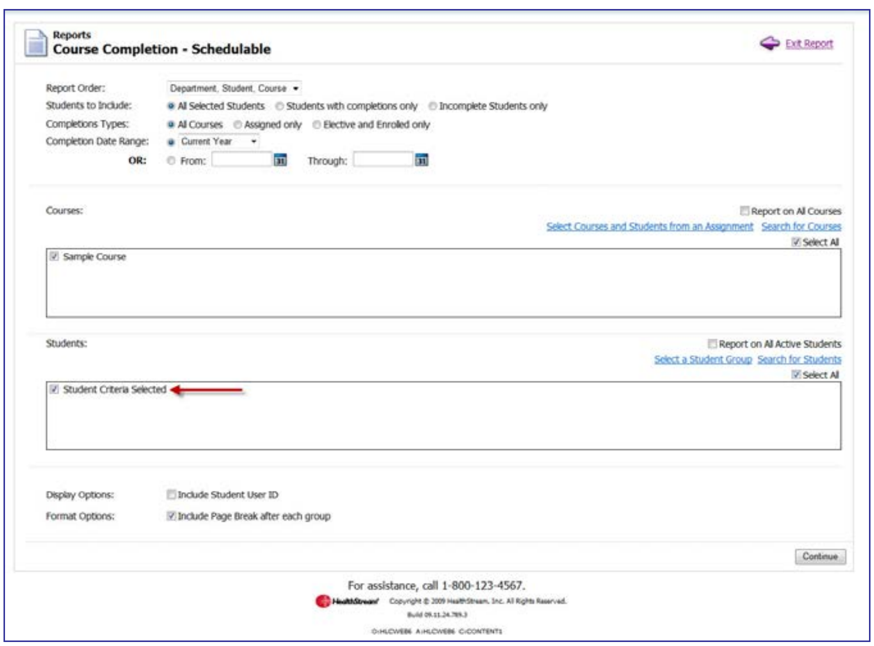
Note: HealthStream Connect does not allow filtered reporting based on these other options.

5. In the **Completion Date Range** list, select the range of dates that you want to use in the report, or enter the months in the **From** and **Through** boxes. The default is **Current Year**. The report will look for instances of the selected courses that were completed within this range.

6. In **Learning**, select the **Report on All Courses** check box if you want the report to include all available courses within HealthStream Connect, or click **Search for Courses** to search for and select specific courses. See *Searching for Courses for a Report* in this document. You are returned to the **Course Completion – Schedulable** page with the courses that you selected in the **Courses** box.



7. In **Students**, select the **Report on All Active Students** check box if you want the report to include all active students within HealthStream Connect, or click **Search for Students** to search for and select specific students. See *Searching for Students for a Report* in this document. You are returned to the **Course Completion – Schedulable** page with the students that you selected in the **Students** box.



Note: If you search for and select specific students for the report and use the current report configuration for future scheduled reports, only those students selected in the original configuration will be included.

8. In **Display Options**, select the **Include Student User ID** check box if you want to include the user ID in the report.
9. In **Format Options**, select **Include Page Break after each group** if you want a page break between groups.
10. Click **Continue**. The report appears in a new window.

Tip: Because the report opens in a new window, after you close the window you can edit your report criteria and create another report.

Timing	Export Formats
Current as of 12 a.m. EST	HTML Adobe PDF Microsoft Excel

Tools Reports

The following report is available from the **Tools Reports** section of the **Reports** tab:

Department Listing

Department Listing Report

The Department Listing report allows you to view all departments in HealthStream Connect.

Note: Department data will not be available unless entered manually or provided via student data import.

To create the report

1. On the **Reports** tab, click **Department Listing**. The **Department Listing** page appears.

2. In **Sort By**, select **Department Code** or **Department Name**.
3. Click **Continue**. The report appears in a new window.

Timing	Formats
Real-time	HTML Adobe PDF Microsoft Excel

Additional Procedures for Creating Reports

The following section contains procedures that are required by several reports. They are included here to avoid repetition.

Searching for Courses for a Report

To search for courses for a report

1. Click **Search for Courses**. The **Browse for a Course** page appears.

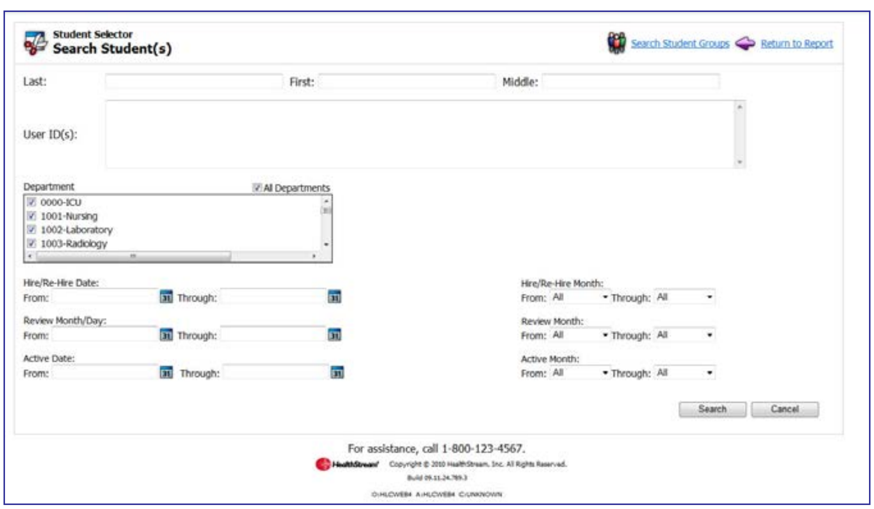
Note: The report from which you came to this page is reflected at the top of the page. The functionality of this page is the same regardless of which report you are creating.

2. Search for the desired course by typing the course name, or browse for courses using the **Alphabetical** or **Category** search.
3. Click **Search**. A list of courses matching your search criteria appears.
4. Select the check box(es) next to the course(s) that you want to use in the report.
5. Click **Select**. The system returns to the report configuration page with the courses in the **Courses** box.

Searching for Students for a Report

To search for students for a report

1. Click **Search for Students**. The **Search Student(s)** page appears.



2. In the **Last**, **First**, and **Middle** boxes, enter the last, first, and middle names of the student that you want to select.
3. In the **User ID(s)** box, enter the student's user ID.
4. Select which departments, job titles, and job categories you want to search from the appropriate sections.
5. Select whether you want to search according to a student's hire month and date, rehire month and date, review month or day, or active date or month from the appropriate sections.

   Note: This data may only be available if it was manually entered or if you elected to import student data into HealthStream Connect. It may be necessary to search students by name or User ID.
6. Click **Search**. The results appear in the **Search Results** box.

   Note: Clicking **Search** without entering a search term will return all students in the system.
7. In the **Search Results** box, select the check boxes next to the students that you wish to include.
8. Click **Continue**. The system returns to the report configuration page with the selected students in the **Students** box.