

Assessment Reports - Which Report to Use and When

Provided by HealthStream Operations and Customer Support

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Summary

At different stages in the performance assessment process/cycle HealthStream Performance administrators will select from the available assessment report(s) the most appropriate reports to meet their needs. This may include reports on individuals that do not have a supervisor, rater and peer assessment workload, assessment status, completion of assignments and report data that will assist in analyzing the assessment process.

HealthStream pre-built learning and pre-built analytics reports allow administrators to determine the status of assessments, assessment progress, and to perform some analysis on ratings and other assessment-related items. Being able to view and analyze status, progress and ratings provides administrators and the leaders they support with up-to-date information on employee and approver progress during the assessment cycle. This allows them to monitor employee performance and make decisions for future assessment endeavors.

Rationale

Learning Standard (Pre-Built) Reports and Analytics reports allow administrators to determine the status of assessments, assessment progress, and to perform some analysis on ratings and other assessment-related items. Being able to view and analyze status, progress and ratings provides administrators and the leaders they support with up-to-date information on the employee and approver progress during the assessment cycle. This allows them to make decisions for future assessment endeavors and monitor employee performance.

Frequently used reports include:

- **Assessment Status:** This report is useful for determining which Assessments have been closed.
- **Assessment Summary:** Run this report to produce Section Score information for HR as they validate employee applications for specific programs or advancement.
- **Employees without Supervisor:** This report helps to identify any employees that might be missing a name in the Supervisor/manager field, which affects the assignment and prevents the workflow from progressing as desired.
- **Assessment Status with Scores:** This report is helpful for department-level and organization-level analysis of ratings for assessment statements.

Analytic reports are schedulable if you have customized and saved a report to your site it is available for you and other administrators to run as needed.

Key Decisions/Considerations

When determining who should have access to the Custom Viewer and Custom Editor Administrator roles, is it important to note that:

- All Admins with Custom Report Viewer can view analytics reports, even those that were customized and saved by another administrator.
- Administrator Profile Department Associations does not control what department data can be viewed by Admins with Custom Report Viewer. For example, an administrator with HealthStream Learning Manager Role access to the Emergency Department will be able to view the data for all departments contained within an Analytics report, not just data for the Emergency Department.

When to Use Which Report

The chart below provides a matrix of reports and when they are best used.

Phase of Assessment process/cycle	Setting Up Assessments/Getting Ready to Make Assignments	Monitoring Progress	Concluding the Assessment Cycle
Recommended Reports	<ul style="list-style-type: none"> • Employees without Supervisor • Peer Assessment Load 	<ul style="list-style-type: none"> • Assignment Completion Reports • Assessment Status • Assessment Status by Student Group • Assessment Progress by Actor • Assessment Approval Status 	<ul style="list-style-type: none"> • Competency Rating Analysis • Goals on Assessments • Assessment Summary • Reflective Plan Summary

Types of Reports

HealthStream Performance Assessment Administrators can use both standard/pre-built learning reports and pre-built reports from the Analytics library to gather information about assessments during the assessment cycle. Below are the two categories of reports.

<u>HealthStream Learning Standard/Pre-Built Reports</u>	<u>HealthStream Analytics Pre-Built Reports</u>
<ul style="list-style-type: none"> • Assignment Completion Drill-Through • Assignment Completion Schedulable 	<ul style="list-style-type: none"> • Assessment Status • Assessment Status by Student Group • Assessment Summary • Employees without Supervisor • Assessment Progress by Actor • Peer Assessment Load • Assessment Approval Status • Competency Rating Analysis • Goals on Assessments • Reflective Plan Summary

Report Descriptions and When to Use

A few notes about each type of report:

- HealthStream Learning Standard/Pre-built reports are current as of 12:00 AM Eastern time.
- The *Assignment Completion Drill-Through* and *Assignment Completion Schedulable* reports can be scheduled to run on a daily, weekly, monthly or quarterly cycle.
- Assessment Analytic reports update every 15 minutes. Once the report renders, in the bottom left-hand corner of the main report page, the date and time of the last update will be displayed.

The table on the next page provides information on each report and when to use it.

HealthStream Learning Standard/Pre-Built Reports					
Report	Description	Purpose	When to Use		
			Setting Up Assessments	Monitoring Progress	Concluding Assessment Cycle
Assignment Completion Drill-Through Assignment Completion Schedulable	These reports show the completion status of assigned assessments	Use these reports to determine the status of the assignment (Completed, Past Due, Not Yet Due, Delinquent, Exempt)		◆	◆

HealthStream Analytics Pre-Built Reports					
Report	Description	Purpose	When to Use		
			Setting Up Assessments	Monitoring Progress	Concluding Assessment Cycle
Assessment Status	This report displays the number and percentage of employees in each assessment state (Evaluate, Review, Approval, and Closed).	<p>This report provides a simple method to track assessment progress.</p> <p>The data can also be viewed by Department or Supervisor, which provides greater insight in regard to compliance in various parts of the organization.</p>		◆	◆
Assessment Status by Student Group	This report is similar to the Assessment Status report, but includes Student Group information.	Users can filter on these Student Groups to report on assessments specifically assigned to particular group of students.		◆	◆
Assessment Summary	<p>Displays all high level data associated with employee Assessments including Overall Score, Rating Level, Section Score, and Comments.</p> <p>This report was designed for export and data analysis in Excel.</p>	<p>This report provides a snapshot of overall assessment data in a simple view that will allow a comparison across employees by Department, Supervisor, or Job Title.</p> <p>Run this report to produce Section Score information for your HR department as they validate employee applications for specific programs or advancement.</p>			◆

HealthStream Analytics Pre-Built Reports, <i>continued</i>					
Report	Description	Purpose	When to Use		
			Setting Up Assessments	Monitoring Progress	Concluding Assessment Cycle
Employees Without Supervisor	This report displays a list of students who do not have a Supervisor designated in their student profiles.	<p>Employees without a supervisor cannot be assigned an assessment.</p> <p>This report helps to identify any employees that might be missing a name in the Supervisor/manager field, which affects the assignment and prevents the workflow from progressing as desired.</p>	◆		
Assessment Progress by Actor	The report tracks assessment progress for all actors on an assessment by displaying the number and percentage of employees in each assessment state (Evaluate, Review, Approval, and Closed).	<p>This report is helpful for administrators to view the status of assessments by Rater, Evaluator, Self and Approver.</p> <p>The data can also be viewed by Department or Supervisor, which provides greater insight in regard to compliance in various parts of the organization.</p>		◆	◆

HealthStream Analytics Pre-Built Reports, <i>continued</i>					
Report	Description	Purpose	When to Use		
			Setting Up Assessments	Monitoring Progress	Concluding Assessment Cycle
Peer Assessment Load	This report displays a summary list of employees selected as peers and their respective number of peer assessments.	Peer assessment is a valuable contribution to the review process that provides additional insight for the supervisor to consider, but could lead to workload challenges with too many assignments. Supervisors can monitor and manage workload by using this report to identify employees with a significant number of peer assessments.	◆		
Assessment Approval Status	This report displays all assessments in the 'Approval' state, which is an optional configuration that requires an approver to approve scores and rating levels before the assessment can move forward in the process.	This report will help organizations identify assessments that require approval so actions can be taken to advance the process and improve completion rates.		◆	

HealthStream Analytics Pre-Built Reports, <i>continued</i>					
Report	Description	Purpose	When to Use		
			Setting Up Assessments	Monitoring Progress	Concluding Assessment Cycle
Competency Rating Analysis	<p>This report displays employee competency rating data including rating level, score, and comments.</p> <p>**Although this report's title includes "competency", the data it contains is more related to the statement on the assessment and the rating the statement received. It can be used for performance assessment statements.</p>	<p>This report identifies employee strengths for succession planning, competency gaps to enhance educational targeting, and validates clinical competencies to meet regulatory and accreditation requirements.</p> <p>Data can be isolated to view one competency (i.e. Teamwork or Communication) across the organization, departments, supervisors, job titles, or rating levels.</p>			◆
Goals on Assessments	<p>This report displays all goals that have been added to assessments.</p>	<p>Use this report to monitor progress toward high level objectives, including Goal Type, Goal Progress, and Goal Outcome.</p> <p>This report has the flexibility to view goal data by Facility, Department, and Supervisor.</p>			◆
Reflective Plan Summary	<p>This report displays a list of employees with a reflective plan assignment.</p>	<p>This report identifies employees with a reflective plan so supervisors can monitor assessment progress and outcomes related to assigned remediation activities.</p>			◆

How to Access Reports

Accessing Standard/Pre-built Reports

Step	Action
1.	Log in as an administrator.
2.	Click the Reports tab.
3.	Locate the desired report: <ul style="list-style-type: none"> Education Reports: <i>Assignment Completion – Drill-Through, Assignment Completion – Schedulable</i>
4.	Select the criteria for each type of report.
5.	Run the report. NOTE: See Online Help for detailed steps on creating each report.

Accessing Analytic Reports in a Subscribed Library (HealthStream provided Library Reports)

Step	Action
1.	Log in as administrator.
2.	Click the Reports tab.
3.	Under Analytics Reports, click View Reports.
4.	Enter your search criteria. You can search by entering text into the search field, alphabetically, by category, by checking the Subscribed Custom Report Libraries box to return HealthStream default reports (and not your copied reports), or by selecting Enabled, Disabled, or Both reports.
5.	Click the magnifying glass twice to load reports. A list of reports matching your search criteria will display. Note: The list of available reports are filtered to show only reports that are available at your level of access within the organization's hierarchy.
6.	Click the name link of the report you wish to run. Result: The report will open in a new window.

Steps To view a Library Report

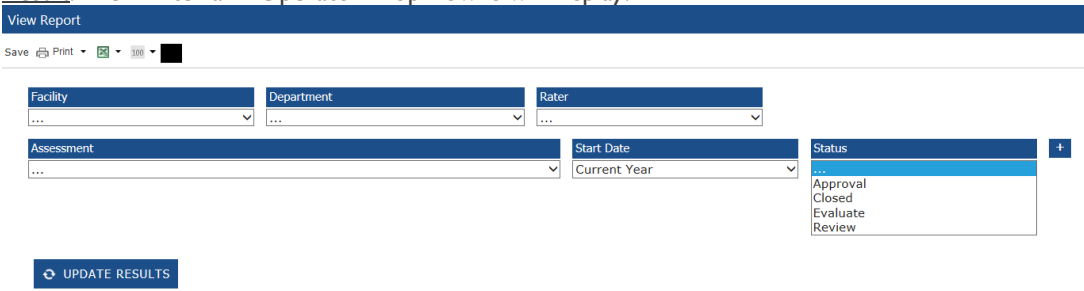

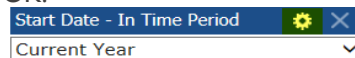
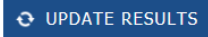
After locating the desired report, click to run the report. The report will open in a new window.

Filtering and Customizing Analytics Reports

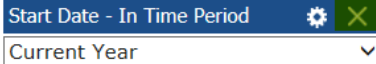


Some common edits/customization of reports may include:

- **Assessment Status with Scores:** Customizing might include assessments with scores higher or lower than a certain score.
- **Assessment Status:** You may wish to filter data to show only assessments in a Review or Evaluate state.
- **Assessment Status by Actor:** This report can be used during, or after, an assessment cycle to monitor overall compliance with the assessment process. You may wish to filter by Department or Supervisor to gain greater insight in regard to compliance in various parts of the organization.
- **Any Report:**
 - If you are part of a large hierarchy, you may wish to filter the data by facility.
 - Directors who manage multiple departments may wish to create reports that include only their departments.
 - Managers may wish to filter reports by supervisor or a group of supervisors.
 - You may wish to change the date range for the report to show previous years, current assessment date ranges or current month only.

Steps to Filter (Edit) a Report

Step	Action
1.	Search for the report you wish to edit.
2.	Click the name link to generate the report. Result: The report opens in a new window.
3.	Existing/Default Fields are displayed. Result: Field Filter and Operator drop-downs will display. 
4.	Click the Field drop-down to select the filter you wish to edit from the existing/default filters. Note: The ellipses (...) will display all values for the field 
5.	Place your mouse over the existing filter until the 'gear' displays, which will allow you to change the Filter Operator; use the drop-down to select the desired operator. Once an operator is selected click OK. 
6.	Once all filters have been edited, select Update Results. 

Steps to Manage Filters

Step	Action
1.	Click the X to delete a filter. 
2.	Click the plus sign to insert another filter. 
3.	Select a field from the drop-down list and apply the Operator to filter.
4.	Once all filters have been edited, select Update Results. 

Steps to Save the Edited Report

If you are satisfied with the results of your edits, click Save. This will permanently save the new configuration to the report. Your edits are saved to the report configuration.

Note: If you wish to preserve the original report configuration, but make an additional report available using the edited configuration, follow the steps below.

Steps to Copy an Edited Report and Create an Alternate Report

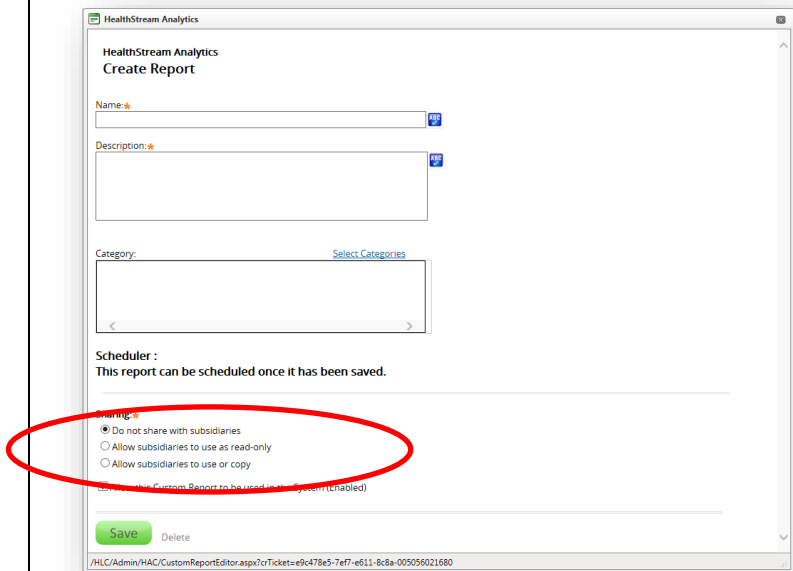
Step	Action
1.	Search for the institution-owned report that you wish to edit.
2.	Click the name link to generate the report. Result: The report opens in a secondary window.
3.	Click Save. The Edit Custom Report page will display. Note: If the fields on this page are grayed-out, the Report was shared to your level of access as read-only. Changes to read-only reports can only be made at the owner level of your organization's hierarchy.
4.	Click Copy. Result: The page is refreshed with the word Copy appended to the end of the report name.
5.	Change the word Copy to alternate or other identifying naming standard for reports you will edit.
6.	Edit the report description, including details about the filter edits you will make.
7.	Map the report to one or more desired categories.
8.	In the Sharing section, there are three options: <ul style="list-style-type: none"> Click <i>Do not share with subsidiaries</i> if the report is being developed at the enterprise level and you do not want to share this report with subsidiary institutions. Click <i>Allow subsidiaries to use as read-only</i> if the report is being developed at the enterprise level and you want subsidiary institutions to have access to use this report as-is. Click <i>Allow subsidiaries to use or copy</i> if the report is being developed at the enterprise level and you want to allow subsidiary institutions to use the report as-is or copy and edit the report as needed.
9.	Clear the <i>Allow this Custom Report to be used in the System (Enabled)</i> check box if you do not want the report to be available to the system.
10.	Click Save. You can now search for this report copy in addition to the original report.

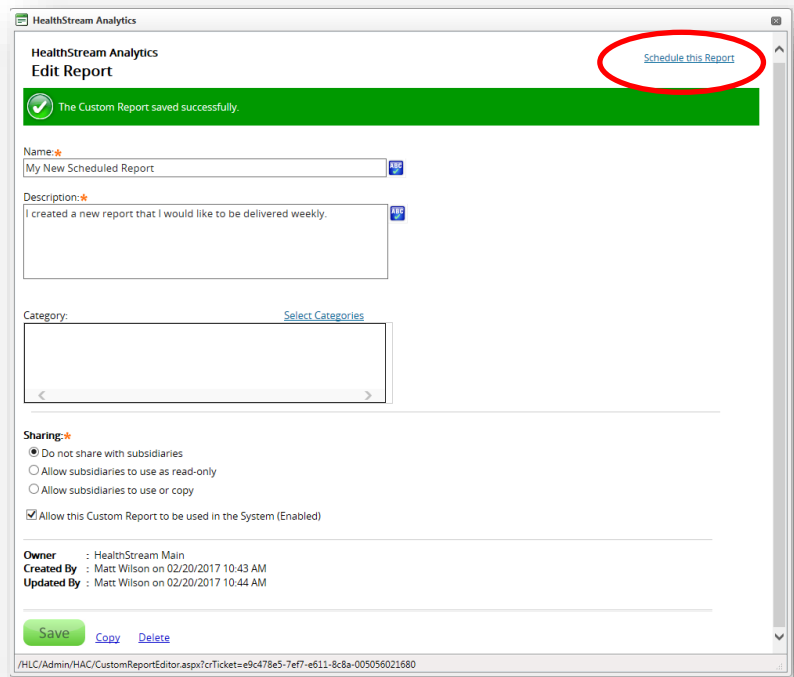
Steps to Access a Report Customized and Saved by the Organization

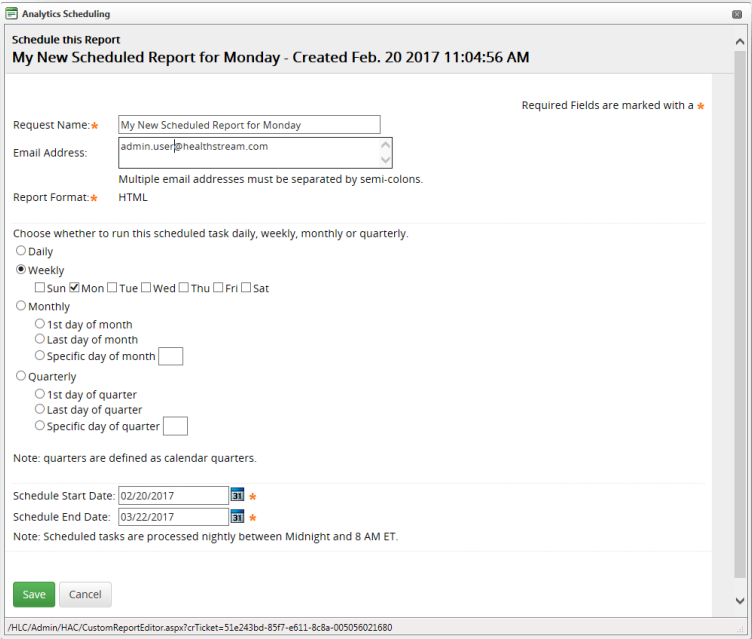
Step	Action
1.	Log in as administrator.
2.	Click the Reports tab.
3.	Under Analytics Reports, click View Reports.
4.	Enter your search criteria. You can search by entering text into the search field, alphabetically, by category. Do not check the Subscribed Custom Report Libraries box.
5.	Click the magnifying glass. <u>Result:</u> A list of reports matching your search criteria will display. <u>Note:</u> The list of available reports is filtered to show only reports that are available at your level of access within the organization's hierarchy.
6.	Click the name link of the report you wish to run. <u>Result:</u> The report will open in a new window.

Scheduling a Report

Similar to Learning Pre-Built/Standard reports, Analytics reports can be scheduled to run on a specific schedule and be delivered to others within the organization.

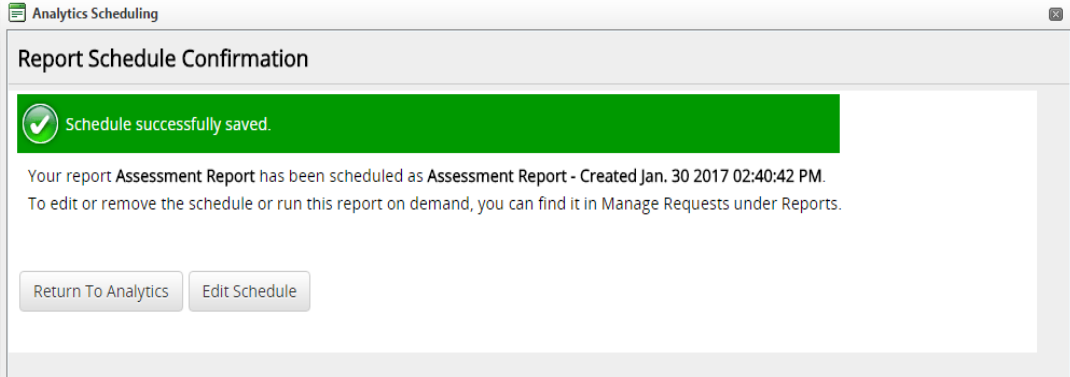
Step	Action
1.	Run the desired Analytics report.
2.	Customize and/or filter the report, if desired.
3.	Click the Save button. <u>Result:</u> The Window below will open.
	
4.	Once the report is saved, the <u>Schedule this Report</u> link will display.

	
<p>5.</p>	<p>Click Schedule this Report to navigate to a scheduler page, where users can set up the delivery schedule and other details for the scheduled report.</p> <ul style="list-style-type: none"> • The Request Name is prepopulated with Report Name and Current Time (EST). Edit this as needed. • The Email Address is prepopulated with the user's email address, or it can be changed. • Additional email addresses can also be added, separated by a semi-colon.



6. Click Save.

Result: The Report Schedule Confirmation window will display.



IMPORTANT NOTES:

- Users must have the Custom Report Viewer administrator role to access and view Analytics reports.
- Users must have the Custom Report Editor administrator role to modify, save or schedule Analytics reports.
- Currently a scheduled report is only available in HTML format.
- Users receiving the scheduled report must log in to HealthStream Learning to view the report data.
- Once the report data is viewed, the report can be exported to Excel or CSV.

Resources

HSTM Online Help

Reports>Education Reports

- Assignment Completion Drill-Through
- Assignment Completion Schedulable

Reports>HealthStream Analytics

- HealthStream Analytics Training
- Data Dictionary for HealthStream Analytics

HealthStream Competency/HealthStream Performance User Guides>HealthStream Competency/HealthStream Performance Administrator User Guides; see HealthStream Competency/HealthStream Performance Reports section

Disclaimer: This is not meant to serve as a definitive "guide" as there are inherently many subtleties and flexibilities within the system. It is only meant to serve as an overview of a recommended practice for fundamental & common HealthStream Learning Administrator tasks. Some of the features described in this document are optional or role-specific, and might not be available to you. If interested in additional information please reach out to Customer Service and/or your internal support desk.