



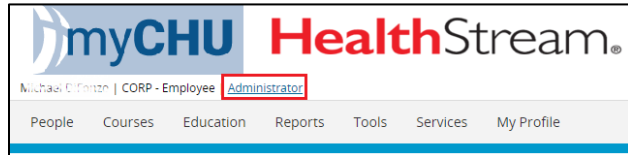
## Quick Tips Sheet

V2021.10.07

### Navigating the System

#### Admin View

- You can switch to your Student/Manager account by clicking Administrator.

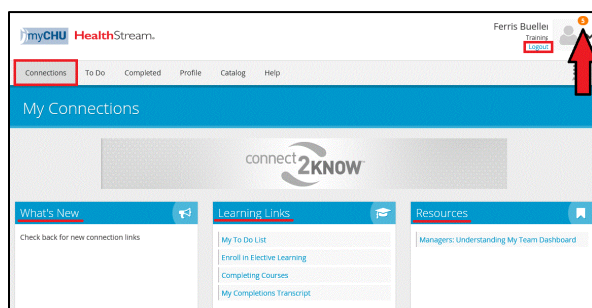


- When in Student/Manager mode
- You can toggle back to your Administrator login by clicking on your affiliation (in this example, CORP-Employee)



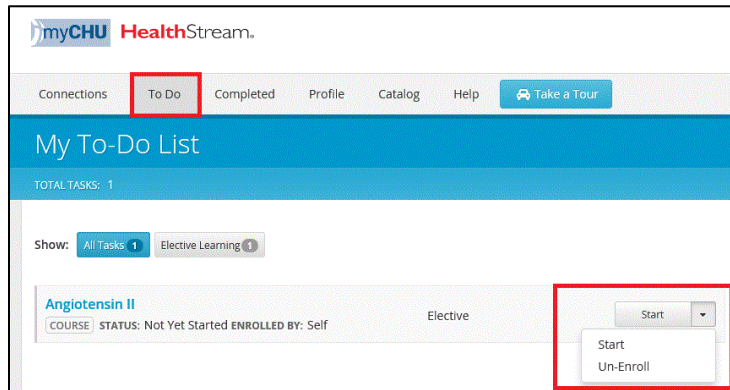
### Connections

The Connections tab will have various links with helpful tips and resources to assist you. You may see an orange Alert circle. Click the Alerts to review the messages. Click Logout to end your session.



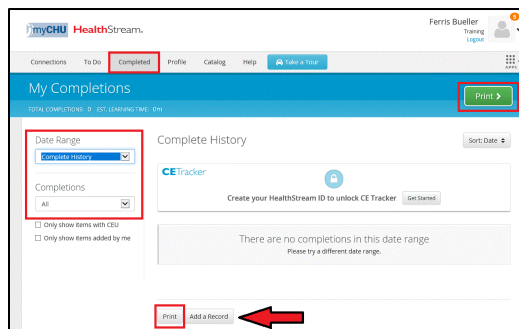
## To Do

The To Do tab will list all of the courses that either were assigned to you or you self-enrolled as an elective. Click Start to begin the course or click the down arrow for more options.



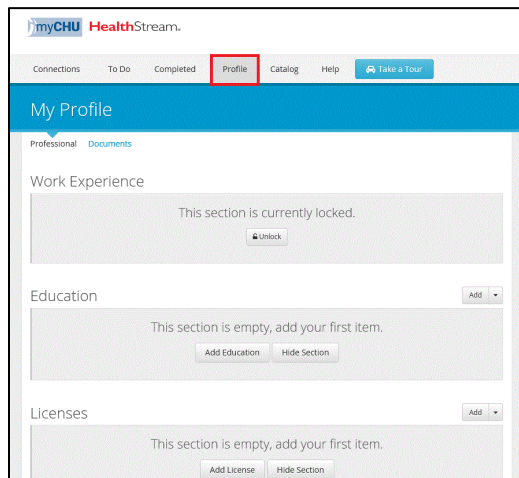
## Completed

The Completed tab is your transcript of all the courses that you have successfully completed. You can use the Date Range and Completions filter to narrow the history. You can Print your completion history and even Export it (PDF, CSV, Excel). There's an option to Add a Record to include outside educational completions/attendance.



## Profile

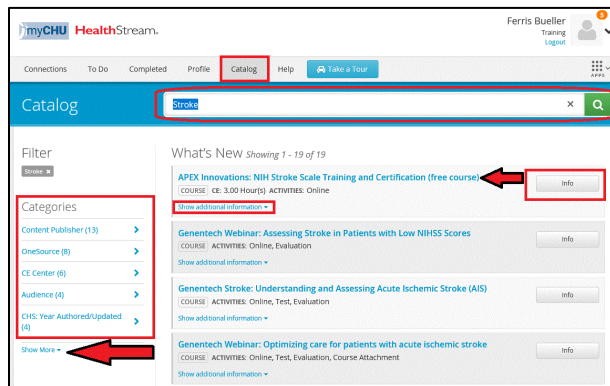
The Profile tab allows the entering of your Work Experience, Education, Licenses, Certifications, Resuscitation Credentials, Memberships & Associations, etc.



## Catalog

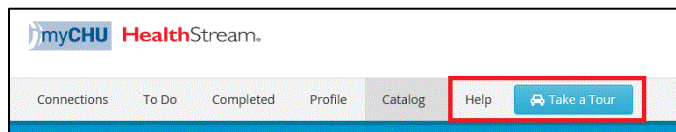
The Catalog tab will list all of the courses available in myCHU HealthStream for you to enroll into. You can type a key word in the Search bar to locate a specific course. You can also click on a link under Categories to filter your search even further. Click Show More to expand the categories.

Click Info, Show additional information, or the course title to learn more about the offering or to Enroll.



## Help or Take a Tour

Click Help or Take a Tour for self-directed learning on how to better navigate myCHU HealthStream.



## Resources

My To Do List:

[http://www.healthstream.com/hlchelp/SMH\\_S/ToDoList/story\\_html5.html](http://www.healthstream.com/hlchelp/SMH_S/ToDoList/story_html5.html)

Enroll in Elective Learning:

[http://www.healthstream.com/hlchelp/SMH\\_S/ElectiveLearning/story\\_html5.html](http://www.healthstream.com/hlchelp/SMH_S/ElectiveLearning/story_html5.html)

Completing Courses:

[http://www.healthstream.com/hlchelp/SMH\\_S/CompletingCourse/story\\_html5.html](http://www.healthstream.com/hlchelp/SMH_S/CompletingCourse/story_html5.html)

My Completions Transcript:

[http://www.healthstream.com/hlchelp/SMH\\_S/ViewingCompletions/story\\_html5.html](http://www.healthstream.com/hlchelp/SMH_S/ViewingCompletions/story_html5.html)

Managers: Understanding My Team Dashboard:

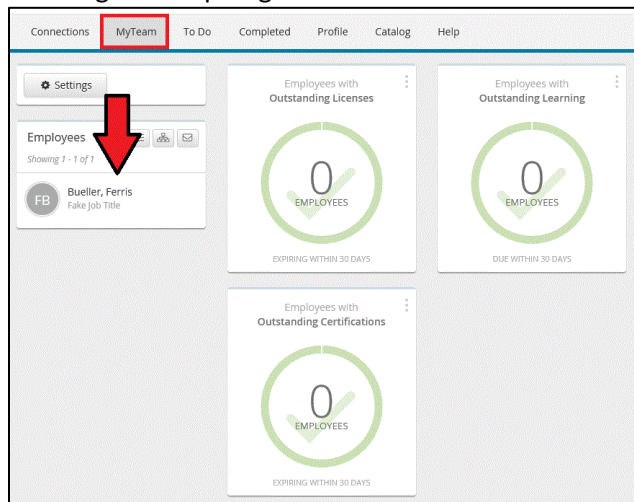
[http://www.healthstream.com/hlchelp/HLC\\_Student\\_Web/Default.htm#MyTeam/The\\_My\\_Team\\_Dashboard.htm%3FTocPath%3DMy%2520Team%7C\\_0](http://www.healthstream.com/hlchelp/HLC_Student_Web/Default.htm#MyTeam/The_My_Team_Dashboard.htm%3FTocPath%3DMy%2520Team%7C_0)

## MyTeam Dashboard

The fastest way to run a transcript on a direct supervisee is to use the MyTeam dashboard. MyTeam displays all direct supervisees of record as recorded in the HRIS system (Lawson). The Supervisor record is imported and **cannot** be changed in HealthStream. If you do not have direct reports, you will not have the MyTeam dashboard. Admins do have the option of assigning a Proxy to allow other people to view their MyTeam Dashboard.

The Widgets is a central location to view items that are expiring or overdue. Click the three vertical dots

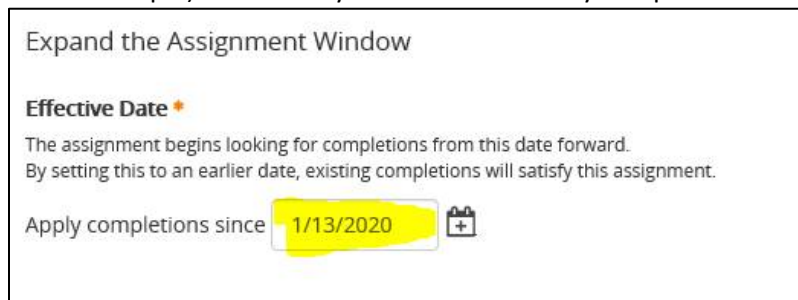
to change the Expiring within dates.



## Avoiding Duplicate Assignments when Assigning CBLs to a Group

When assigning a CBL, you will want to make sure that you are NOT re-assigning education to someone that has already completed it. If you do re-assign the education, the CBL will appear on their To Do tab even though they have already completed it.

When creating the assignment, you will need to change the Effective Date to an earlier date (1/1/2020 in this example) to catch anyone that had already completed the CBL and NOT re-assign it.



## Search for Classes

When running reports/looking for information and you see Class Affiliation, make sure you uncheck the box that is in the box as shown below. This will allow you to see everything in the system (all classes etc.)



## Registering Students

If you drop an associate/student from a class, you need to also unenroll them from the course or they will still show up as being enrolled in the course.

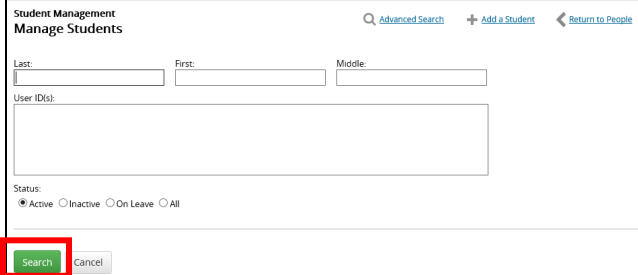
## Reports

Reoccurring reports can be run once you have run your report. The option to “Schedule your Report” will appear once your report has run/been completed.

Any activity completed on the day you are running the report will NOT appear in your report but will appear on the individual’s transcript. Activity/reports are updated the following day. Viewing transcripts directly will include today’s activity.

## Searching Students

To display all of the students/associates click the Enter key on your keyboard or click the Search button on the screen. A listing of all your students/associates will appear along with their User ID, Affiliation, and Last Login Date.



The screenshot shows the 'Student Management Manage Students' interface. At the top right, there are links for 'Advanced Search', 'Add a Student', and 'Return to People'. Below these are three input fields for 'Last', 'First', and 'Middle' names. A large text area is provided for 'User ID(s)'. At the bottom, there is a 'Status' section with radio buttons for 'Active', 'Inactive', 'On Leave', and 'All'. A red box highlights the 'Search' button, which is next to a 'Cancel' button.

Student/associates can be entered using their name or User ID

- More than one student/associate name and/or User ID can be entered at a time
- If you have more than one User ID, multiple IDs can be entered in the User ID(s) box. These IDs can be cut and pasted from documents and dropped into this area, no commas or semicolons necessary (User IDs should be listed under each other)

## System Information

- New Hires are imported from the HR system into myCHU HealthStream twice a day (~6am and 3pm).
- Termed employees are updated in the system every day by 6am
- **Important to note:** Administrator access will be removed automatically due to inactivity if not used in a 180 day timeframe

## Transcripts

- Transcripts in HealthStream (HS) show the history of completion
- Transcripts can be run a few different ways:
  - MyTeam Dashboard
  - From the People Tab (Admin View)
  - From the Reports Tab – Student and Group Transcript (Admin View)
- Learning Activity can be added to your transcript via the “My Completions” area by selecting the Completed tab and scrolling to the bottom of the screen and “Add a Record”. You can add your activity and any documents you would like to attach

## Terms

**Learning Activity:** A component of a course. Examples of learning activities include test (including pre-tests), authored content, instructor-led classes, and learner evaluations

## Formatting

When using your mouse in HS the right click of your mouse is not enabled; if you need to copy information (i.e. Class Description) from a document and paste it in HS then you would locate and highlight the item press Ctrl+C (to copy) and Ctrl+V (to paste) it into your location in HS

In certain sections you may need to select an icon to paste. In those cases, select the icon for Paste Plain Text or Paste from Word.

To resize the displayed text in HS, from the Internet Explorer menu bar click View > Text Size and select the desired text size from the available options