



Product Guide

careLearning is an online education company designed to help healthcare organizations by providing reliable, trusted and easily-accessible talent management solutions. Through our state-of-the-art education management system, including the Learning Management System (LMS) and Administrative Management System (AMS), you can take advantage of rapid and efficient delivery and tracking of courses and documentation of instructor-led training.

This guide will assist you and your staff in both the implementation and renewal of your use of the *careLearning* education management system. Not all sections may be applicable to your organization.

Implementation Process

The first step of the process includes an initial call to review the pre-implementation questionnaire and IS Readiness checklist, and create an implementation plan. The following individuals are included in the call: Primary User, Administrative Contact, I.T. contact and The Director of Workforce Development Solutions, Client Engagement Specialist and Technical Support Representative. The implementation plan will outline each step of the process and provide deadlines for each in an effort to complete implementation within the timeframe desired by your organization. Generally speaking, an average implementation concentrates on the following training:

- Employee Import
- Curriculum
- Groups
- Add-on Material
- Private Courses
- Events
- Trackit
- eRegistrar

Renewal Process

Traditionally, your organization's renewal date will be set for one year from the date you complete implementation. You will receive a notice and renewal questionnaire 2 months prior to this date to prepare for a renewal call. The renewal call is required in order for *careLearning* to re-set specific areas of your system. Generally speaking, an average renewal call is usually fairly short and concentrates on the following items:

- Downloading Final Completion Data
- Archiving data
- Registering your students for the following subscription year
- Additional training as requested

Larger organizations with multiple administrators or the addition of many new features may require more training or several phone calls. There are no limits to the amount of training you can request to get started and to continue the use of the product. Technical Support is available for those individuals responsible for the administration and oversight of the *careLearning* system. Training is not available from *careLearning* for your employees nor does training include basic use and operation of your desktop PC. Basic understanding of your computer is necessary to administer the product successfully.

Features

The following features add value to using the *careLearning* product and are available to your organization. A detailed description of each can be found within this guide.

- Automatic bulk enrollment of employees vs. Manual input of employees
- The addition of hospital-specific material (Add-on Material) to any of the Health and Safety Compliance and/or Rights and Responsibilities courses
- The use of the Curriculum and/or Groups feature
- Use of eRegistrar
- The production of “Private” courses
- ID Badge Scanning

Bulk Enrolling

Choosing to import your employees from a file vs. manually adding each employee one at a time is a decision that should be evaluated. The general rule of thumb is only the smallest of organizations even consider manual input. Importing individuals from a file is not only easier but it also makes the on-going maintenance of the system much easier.

Included in this guide is the “Technical Requirements” document which contains the “File Format Specifications” required for importing your employees from a file. This document should be shared with your I.T.

Course Series

The Health and Safety Compliance series (Silver Package) contains the following courses:

Abuse and Neglect	Medical Radiation Safety
Bloodborne Pathogens	Moving, Lifting and Repetitive Motion
Disaster Preparedness	Patient Rights
Electrical Safety	Population Specific Care- Adults
Fire Safety	Population Specific Care- Pediatrics
Hazard Communication	Restraint (or Restraint and Seclusion)
Hand Hygiene	Slips, Trips, and Falls
Infection Control- Non-Clinical	Tuberculosis Prevention
Isolation and Standard Precautions	

The Rights and Responsibilities series (Gold Package) contains the following courses in addition to the Health and Safety Compliance series:

EMTALA	Sexual Harassment
FACTA Red Flags	Workplace Diversity
Healthcare Compliance	Workplace Violence Prevention
HIPAA	
Pain Management	

While these courses are purchased in bundles, you can choose not to use any

courses that do not contain information pertinent to your organization's educational needs and private courses are always available for your unlimited use. These courses can be customized through the use of **attributes**. Attributes are any features that exist in a careLearning course that can be controlled by either the organization or in some cases the student.

The use of attributes is discussed in depth in this guide. This section will discuss the ability to customize the series by adding supplementary hospital-specific information (add-on material). Re-writing or changing of any existing information in the courses is **not possible**. This includes the pre- and post-test questions, quiz questions, and course content. Quiz questions can be found at the end of many lessons to reinforce the material that was taught. These questions are not scored, however if a student answers a question incorrectly, they will be directed back to the beginning of the lesson once and be given the correct answer on a failed second attempt.

Lastly, you can decide whether or not to permit a student to "test out" of a course by scoring a 100% on a pre-test. They will only have one attempt. If a pre-test is not present or the user does not "test out" they will have to take the course and complete the post-test. **They must score a 100% on the course post-test.** Each course within the series addresses life safety standards and regulations; therefore answering each post-test question correctly is essential. If a student does not pass the post-test they will be advised of the question(s) they answered both correctly and incorrectly and be directed to attempt the test again. They may also click "Contents" to review specific lessons prior to reattempting the test. The post-test may be taken as many times as necessary in order to meet the required 100% passing score.

Course Curriculum

The use of the curriculum feature allows you to set up different course requirements for different types of employees at your organization. Setting up a curriculum can allow you to have one group of departments or job codes taking all Health and Safety courses, while another group of departments or job codes may only be required to take a few of the courses. Using the AMS Group feature can allow you to setup even more complex curricula which may include exemptions for certain job code/department combinations. In addition, there are special rules that can be set for new employees; exempting them from some courses or giving them special courses they need as new hires. You can setup as many curricula as needed to meet your needs.

The included Course Curriculum document provides you with examples of how to lay out a plan for your organization. Like private courses, this task tends to be underestimated and can be very time consuming. Once completed however, it is set to go and requires little, if any, maintenance. We have seen people get carried away with this feature and create more problems than they had beforehand. A grounded, realistic plan will truly pay off with this feature.

eRegistrar

Our Intranet interface, eRegistrar (you may customize the name as you wish), will allow your employees a single source interface for managing their education. Employees can simply log-in to your Intranet to perform a number of tasks:

- View what online courses they need to complete and access their classroom to complete them.
- View a calendar of upcoming live Events
- Register for live Events
- Run educational transcript reports
- View deadlines, due dates, and more.

Department managers also use this tool to get information about employee's progress in their education. Access rights are determined by an AMS administrator at your facility.

The package is available only as an Intranet package. You will need to engage your I.T. department for the decision on whether this feature can be used within your organization.

Private Courses

A private course is any course added to the *careLearning* Learning Management System that is written and produced by your organization, for the sole use of your organization. Included in the price of the *careLearning* system is the Course Center tool in which you can use to create, review and publish an unlimited number of private courses. The details of producing a private course are available in this guide and you should fully understand this process if you plan on authoring private courses.

ID Badge Scanning

Just as it sounds, the use of this feature allows you to scan the ID badges of your employees at live events and then load them directly into the AMS without manually doing so. ID badge scanning requires that your badges contain one of these 3 types of encoding types; bar code, magnetic strip, or proximity. It also normally requires the purchase of the scanner from *careLearning*. (Contact Technical Support for pricing information or if you have ID badge scanners already available and you wish to check on the ability for your scanner to operate with our system.)

The use of the ID badge scanner requires that you first send *careLearning* a sample badge so that we may determine proper compatibility with our scanners prior to your purchase.

Catalog Courses

careLearning offers a catalog of courses that an individual or organization can purchase and add to their student classrooms. Individuals can purchase the courses directly from the catalog using a credit card. Organizations are encouraged to purchase the courses via Technical Support and inquire regarding possible bulk purchase discounts; however, they may also purchase via P.O. or credit card. The system administrator may add the

catalog courses to curriculum or place directly into the student's classroom. We encourage you to browse the catalog and contact Technical Support if you would like to review a course prior to making a purchasing decision. If you do not find the topic you are seeking, again, contact Technical Support so we can assist you. If you experience any technical difficulties with a catalog course, please refer to Technical Requirement or contact Technical Support.

Events

The Events feature of the AMS is designed to manage instructor-led and other educational activities that are not online. There are no limits to the type or quantity of programs you can enter into the Event function. Post dates, times and locations of classroom activities on an Events calendar that is easily accessible to your staff. Allow employees to self-register for events and manage the registrations, waiting list and cancellations. Utilize live event planning capabilities including pre-registration, e-mail notifications and the ability to access rosters, name tags, certificates and more.

TrackIt

Track professional licenses, licensure renewal and certificates, as well as run reports by license type and expiration.

Summary

Each organization is unique and has different needs and goals for using an eLearning solution. Our experienced technical/training staff stands ready to put their years of experience to work for you. As you can see the need for a schedule and a coordinated effort by both *careLearning* staff and your staff is essential for making your implementation and renewal occur in a timely manner. While we are very aware that often times the time schedule of those you work with are not under your control and therefore the best laid plans can quickly become worthless, *careLearning* cannot guarantee the target start date for items listed here which are not in our control. Should you need further assistance with any of the documents in this guide, please call *careLearning* Technical Support at 1-866-617-3904 or e-mail at support@carelearning.com. Thank you for choosing *careLearning* as your education management system. We look forward to serving your needs over the months and years to come.

Add-on Material (Course Attributes)

Overview

The Health and Safety Compliance series (Silver Package) contains 17 courses. The Rights and Responsibilities series (Gold Package) contains 8 courses in addition to the Health and Safety Compliance series. These courses were chosen based on feedback from our current *careLearning* organizations. We realize that there are different thoughts as to what courses should be in each series. You may find a course that you don't want to have your employees take. This is not a problem because you have complete control over which courses appear in their classrooms. You may also find that a topic is missing that you wish to have them take. Again, this is not a problem because you can add your own private courses for them to take. And the good news is that you can do this at no cost.

While Technical Support will put the attributes in the correct formatting to fit within the *careLearning* course, only your organization can write the add-on material.

Course Specific Attributes

Attributes are any features that exist in a *careLearning* course that can be controlled by either the organization or in some cases the student.

There are four (4) attributes available in all of the Health & Safety Compliance courses.

They are:

1. Pre-test control: Your organization can decide whether or not to permit a student to "test out" of the course by scoring a 100% on a course pre-test. Default Setting: YES
2. Pre-course add-on material: You may as an option wish to add your own information to the beginning of the course. This information will automatically display on the student's screen at the beginning of the course. Default: NONE
3. Post-course add-on material: You may as an option wish to add your own information to the end of the course. This information will automatically display on the student's screen at the end of the course. Default: NONE
4. Closed captioning: Students that are hearing impaired or would like to see the words being spoken may turn-on or off "Display/Hide Text" anytime they wish. This is a student-controlled attribute.

Notes

- The use of attributes is optional. They are not required to take a

course and are automatically set to their default settings.

- The use of attributes is FREE of charge and can be activated or deactivated anytime during the course of your *careLearning* year.

Requirements for Add-On Material

- The following are additional attributes that can be found throughout different courses. These attributes are noted within the transcripts when they are available.
 - **Additional Lesson-Specific Information (Add-on Material):** You have the option of adding more information to selected lessons. To access this information, the student must click “**Resources**” in the navigation menu when advised to do so within the course. The words “Click on Resources” will be displayed at the bottom of the student’s screen when applicable.

To add-on material requires several steps be followed and some principles of the Internet be understood.

- You will need to have access to a web server. This requires that you speak with your I.T. department. Basically you will need to have a folder available on that server for you to place your add-on material. *careLearning* Technical Support will be more than happy to talk with your I.T. staff about the requirements and how it works. If you do not have access to a web server, contact your *careLearning* state hospital association representative for possible assistance.
- You will need to produce the policy/procedure and/or additional information in a PowerPoint or PDF format.
- The added material will appear in the course just as you type and produce it. If it is text only, that is what will be in the course. If you add pictures, that too will be as it appears in the course.
- Each lesson’s added information must be its own file. For example, if you were to add your organization’s procedure for corrective action regarding defective items (Electrical Safety – Lesson 5: Dealing With Defective Items) then you would type out what you wanted to say, save it as in a PowerPoint file, name it “es-L5.ppt” (electrical safety-lesson5), and send it to Technical Support to convert. We will send it back to put on your web server.
- In addition each lesson’s file can contain no more than 5 PowerPoint slides. If you have more than this, we recommend that

you create a separate private course so that you might test on that amount of material. The exception to this rule is if you are giving us a PDF that your employees are just going to print off for reference. In that case, there is no page limit.

- ❑ **Display contact Information:** You have the option of displaying contact information throughout the course. The lessons in which the contact information will be displayed are indicated in the transcript. **The same contact information will appear in each lesson that offers this attribute.** Simply type directly into the LMS under the Course Attributes Assignments sections. (Please note that the space is limited to 50 characters wide and you cannot use “special” characters such as commas). This information will be displayed automatically at the bottom of the student’s screen. You will be instructed on how to do this at the time of training. Be sure to have the appropriate information written down at that time.
- ❑ **Remove or Add a Lesson:** In many courses there are specific lessons that may be added or removed. For example, in the “Medical Radiation Safety” course, the lesson on Magnetic Resonance Imaging (MRI) may be removed from the course if it does not apply to your organization.

REMEMBER: These are optional features. Using the series does not require that you add-on optional information.

In addition to the (4) available attributes, the courses on the following pages allow additional add-on material options within the body of the course.

Each of the courses are presented in “Lessons”. On the pages that follow, you will find each of the courses in alphabetical order and each of the lessons within that course numbered 1, 2, 3, etc.

If you are following along with the online course please note that the “Lesson” numbers in these transcripts correspond to the “Lesson” numbers in the LMS. **In each course “Lesson 1” always starts in Learning Unit 5 of the online table of contents.** They are always in the same order however. The reason for this is that each of the courses contains the same opening pages.

- ❑ Learning Unit 1: Course Navigation
- ❑ Learning Unit 2: Course Completion and Features
- ❑ Learning Unit 3: Pre-course Facility Specific Information (optional)
- ❑ Learning Unit 4: Pretest
- ❑ Learning Unit 5: Lesson 1

Health and Safety Compliance series

Abuse and Neglect

Lesson 2: Identification and Assessment

- You may wish to add-on your organization's policies and procedures for the identification/assessment of victims of abuse and neglect and/or referral to community agencies.

Lesson 4: Reporting Abuse and Neglect

- You may wish to display the contact information for the appropriate personnel within your organization.
- You may wish to add-on your organization's policies and procedures for reporting abuse and neglect.

Lesson 5: Conclusion

- You may wish to display the contact information for the appropriate personnel within your organization.

Bloodborne Pathogens

This course has been created for clinical employees. We encourage you to use the "Infection Prevention and Control for Non-Clinical Employees" course for your non-clinical employees.

Lesson 3: Exposure Control Plan

- Access to the OSHA Bloodborne Pathogens standards (1910.1030) is provided under Resources in this lesson. Your organization may also wish to add-on information regarding your Exposure Control Plan.

Lesson 4: Prevention of Sharps Injuries

- You may wish to add-on information regarding the types of “safe” medical devices used within your organization, personnel to contact with opinions about medical devices, whether your organization allows the recapping of used sharps, whom to contact if a sharps collection unit needs replaced, and which sharps are approved for re-use.

Lesson 5: Prevention of Indirect Exposures

- You may wish to add-on your organization’s policies and procedures on equipment and surface cleaning.

Lesson 6: Spills

- You may wish to add-on your organization’s policies and procedures for spills.

Lesson 7: Medical Waste

- You may wish to add-on your organization’s policies and procedures for the handling, transporting and discarding of medical waste.

Lesson 9: Post Exposure

- You may wish to add-on your organization’s policies and procedures on caring for and reporting an exposure.

Lesson 10: Conclusion

- You may wish to display contact information for the appropriate personnel within your organization.

Disaster Preparedness

Lesson 3: Internal Disasters – Bomb Threats

- You may wish to add-on your organization’s policy and procedure, including whom to notify, for bomb threats.

Lesson 4: Fire

- You may wish to remove this lesson from the course if your organization participates in the Health & Safety Compliance “Fire Safety” course.
- If you choose to keep this section, you may wish to add-on your organization’s policy and procedure, including whom to notify for fire.

Lesson 5: Chemical Spills

- You may wish to remove this lesson from the course if your organization participates in the Health & Safety Compliance “Hazardous Communication” course.
- If you choose to keep this lesson, you may wish to add-on your organization’s policy and procedure, including whom to notify, for chemical spills.

Lesson 8: Conclusion

- You may wish to display contact information for the appropriate personnel within your organization.

Electrical Safety

Lesson 4: Prevention of Electrical Accidents

- You may wish to add-on your organization’s policy on tagging/removing unsafe equipment.
- You may wish to display contact information for the appropriate personnel within your organization.

Lesson 5: Conclusion

- You may wish to display contact information for the appropriate personnel within your organization.

Fire Safety

Lesson 4: Fire Safety Plan

- You may wish to add-on your organization's fire safety plan or alternative to R.A.C.E. or R.A.C.E.R.

Lesson 5: R.A.C.E.

- This lesson can be removed from the course for your organization if you choose to use the R.A.C.E.R. lesson or an alternative – see Lesson 4.
- You may wish to display contact information for the appropriate personnel within your organization.
- You may wish to add-on organization specific information regarding R.A.C.E. to this lesson.

Lesson 6: R.A.C.E.R.

- This lesson can be added to the course for your organization if you choose not to use the R.A.C.E. lesson or an alternative – see Lesson 4.
- You may wish to display contact information for the appropriate personnel within your organization.
- You may wish to add-on organization specific information regarding R.A.C.E.R. to this lesson.

Lesson 9: Using a Fire Extinguisher

- You may wish to display contact information for the appropriate personnel within your organization.

Lesson 11: Conclusion

- You may wish to display contact information for the appropriate personnel within your organization.

Hand Hygiene

Lesson 6: Other Aspects of Hand Hygiene

- You may wish to display contact information for the appropriate personnel within your organization.

Lesson 7: Fingernails and Artificial Nails

- This lesson may be removed from the course for your organization.
- You may wish to add-on your organization's policy regarding artificial fingernails, nail polish and the wearing of jewelry by health care workers.

Lesson 9: Conclusion

- You may wish to display contact information for the appropriate personnel within your organization.

Hazard Communication

Lesson 4: Container Labeling

- You may wish to display contact information for the appropriate personnel within your organization.

Lesson 5: Material Safety Data Sheets

- You may wish to display contact information for the appropriate personnel within your organization.

Lesson 7: Conclusion

- You may wish to display contact information for the appropriate personnel within your organization.

Hazard Communication – GHS Version

This course has been created based upon the 2012 OSHA revisions.

Lesson 4: Container Labeling

- You may wish to display contact information for the appropriate personnel within your organization.

Lesson 5: Safety Data Sheets

- You may wish to display contact information for the appropriate personnel within your organization.

Lesson 7: Conclusion

- You may wish to display contact information for the appropriate personnel within your organization.

Infection Prevention and Control for Non-Clinical Employees

This course has been created using the content from the Bloodborne Pathogens, Isolation and Standard Precautions, and TB Prevention courses and customized to meet the needs of the non-clinical employee.

Lesson 4: Indirect Contact

- You may wish to add-on your organization's policies and procedures on equipment and surface cleaning, spills, or the handling, transporting and discarding of medical waste.

Lesson 5: Unprotected Contact

- You may wish to add-on your organization's policies and procedures on caring for and reporting an exposure.

Lesson 6: Transmission-Based Precautions

- You may wish to add-on additional information on Transmission-Based Precautions – such as organization-specific signs.

Lesson 7: Conclusion

- You may wish to display contact information for the appropriate personnel within your organization.

Isolation and Standard Precautions

This course has been created for clinical employees. We encourage you to use the “Infection Prevention and Control for Non-Clinical Employees” course for your non-clinical employees.

Lesson 2: Standard Precautions

- You may wish to add-on your organization’s policy and procedure on the cleaning of reusable equipment and surfaces.

Lesson 3: Transmission-Based Precautions

- You may wish to add-on additional information on Transmission-Based Precautions – such as organization-specific signage.
- You may wish to display contact information for the appropriate personnel within your organization.

Lesson 5: Conclusion

- You may wish to display contact information for the appropriate personnel within your organization.

Medical Radiation Safety

Lesson 4: Sources of Radiation – Diagnostic Nuclear Medicine

- This lesson may be removed from the course for your organization

Lesson 5: Sources of Radiation – Therapeutic Nuclear Medicine

- This lesson may be removed from the course for your organization

Lesson 6: Sources of Radiation – Radiation Therapy

- This lesson may be removed from the course for your organization

Lesson 9: Internal Exposure Precautions

- This lesson may be removed from the course for your organization

Lesson 15: Radioactive Contamination Concerns

- You may wish to add-on your organization's policy regarding radioactive spills, including proper notification of appropriate personnel.
- This lesson may be removed from the course for your organization.

Lesson 16: Magnetic Resonance Imaging

- This lesson may be removed from the course for your organization

Lesson 17: Conclusion

- You may wish to display contact information for the appropriate personnel within your organization.

Moving and Lifting

Lesson 3: Patient or Resident Lifting and Moving

- This lesson may be removed from the course for your organization OR
- You may wish to add-on additional types of moving and lifting maneuvers approved by your organization

Lesson 4: Mechanical Aids and Assistive Devices

- This lesson may be removed from the course for your organization OR
- You may wish to add-on a policy and procedure or list of aids/devices used within your organization

Lesson 7: Reporting

- You may wish to display contact information for the appropriate personnel within your organization.
- You may wish to add-on your policy and procedure for reporting injuries

Lesson 8: Conclusion

- You may wish to display contact information for the appropriate personnel within your organization.

Patients' Rights

Lesson 5: Informed Consent

- You may wish to add-on your organization's policy and procedure on informed consent.

Lesson 6: Advanced Directives

- You may wish to add-on information on your organization's advance directive policies and procedures.

Lesson 7: Right to Privacy

- You may wish to add-on information on your organization's HIPAA policies and procedures.

Lesson 8: Right to Safety

- You may wish to add-on information on your organization's abuse and neglect reporting procedures.

Lesson 10: Right to File a Complaint

- You may wish to add-on information on your organization's grievance reporting/resolution process.

Lesson 12: Code of Ethics

- You may wish to add-on information on your organization's code of ethics or Ethics Committee.

Lesson 13: Conclusion

- You may wish to display the contact information for the appropriate personnel within your organization.

Population Specific Care – The Infant, Pediatric, and Adolescent Patient

Lesson 3: Care Guidelines: Infants – School Age

- You may wish to add-on information on care guidelines based on your organization's policies and procedures.

Lesson 5: Care Guidelines: Adolescents

- You may wish to add-on information on care guidelines based on your organization's policies and procedures.

Lesson 6: Conclusion

- You may wish to display the contact information for the appropriate personnel.

Population Specific Care – The Adult Patient or Resident

Lesson 2: Introduction – Population Specific Care

- You may wish to remove this lesson if your organization participates in Population Specific Care for the Infant, Pediatric, and Adolescent Patient. The content of this lesson is the same.

Lesson 4: Care Guidelines: Young – Middle Adult

- You may wish to add-on information on care guidelines based on your organization's policies and procedures.

Lesson 6: Care Guidelines: The Older Adult

- You may wish to add-on information on care guidelines based on your organization's policies and procedures.

Lesson 7: Conclusion

- You may wish to display the contact information for the appropriate personnel.

Restraint

The “Restraint” and “Restraint and Seclusion” courses contain the same material other than the “Restraint and Seclusion” course provides education on seclusion as well. You will need to decide between the two courses based upon the population which you serve.

The Restraint course has been created to satisfy the requirements for organizations that **use** and **do not use** Joint Commission accreditation for deemed status purposes. Lessons specific to organizations that **do not use** accreditation for deemed status are hidden in the distributed course, however you may request to use these lessons. In addition, there are lessons on the management of violent or self-destructive behaviors that are hidden. The Restraint course does not address staff training requirements.

Lesson 2: Restraint Defined

- You may wish to add-on your organization's policies and procedures on age or developmentally appropriate protective safety interventions.

Lesson 3: Restraint as a Last Resort

- You may wish to add-on safe and appropriate techniques for restraint as defined by your organization.

Lesson 4: Plan of Care

- You may wish to add-on the timeframe for reviewing and/or updating the plan of care or treatment plan as specified by your organization.

Lesson 5: Restraint Order

- This lesson may be removed if your organization does not use accreditation for deemed status purposes and use Lesson 6 instead.

- You may wish to add-on your organization's policies and procedures that define "as soon as possible" (related to a restraint order).
- You may wish to add-on your organization's guidelines for the appropriate discontinuation of a restraint.
- You may wish to add-on your organization's policy that defines the situations in which a restraint may be initiated before receiving an order.

Lesson 6: Restraint Order – The Joint Commission

- This lesson may be added if your organization does not use accreditation for deemed status purposes.
- You may wish to add-on your organization's policies and procedures.

Lesson 7: Monitoring and Assessment

- This lesson may be removed if your organization does not use accreditation for deemed status purposes and use Lesson 8 instead.
- You may wish to add-on your organization's policies for appropriate intervals for assessment and monitoring.

Lesson 8: Monitoring and Assessment – The Joint Commission

- This lesson may be added if your organization does not use accreditation for deemed status purposes.

Lesson 9: Documentation

- You may wish to add-on additional elements of documentation as specified in your organization's policy.

Lesson 10: Management of Violent or Self-Destructive Behavior

- This lesson may be added to the course for your organization.

Lesson 11: Restraint Order

- This lesson may be added to the course for your organization.

Lesson 12: Patient/Resident Evaluations – The Joint Commission

- This lesson may be added to the course for your organization.

Lesson 13: Monitoring and Assessment – The Joint Commission

- This lesson may be added to the course for your organization.

Lesson 14: Reporting

- You may wish to display the contact information for the appropriate personnel.

Lesson 15: Conclusion

- You may wish to display the contact information for the appropriate personnel.

Restraint and Seclusion

The “Restraint” and “Restraint and Seclusion” courses contain the same material other than the “Restraint and Seclusion” course provides education on seclusion as well. You will need to decide between the two courses based upon the population which you serve.

The Restraint and Seclusion course has been created to satisfy the requirements for organizations that **use** and **do not use** Joint Commission accreditation for deemed status purposes. Lessons specific to organizations that **do not use** accreditation for deemed status are hidden in the distributed course, however you may request to use these lessons. In addition, there are lessons on the management of violent or self-destructive behaviors that are hidden. The Restraint and Seclusion course does not address staff training requirements.

Lesson 2: Restraint Defined

- You may wish to add-on your organization’s policies and procedures on age or developmentally appropriate protective safety interventions.

Lesson 3: Restraint as a Last Resort

- You may wish to add-on safe and appropriate techniques for restraint as defined by your organization.

Lesson 4: Plan of Care

- You may wish to add-on the timeframe for reviewing and/or updating the plan of care or treatment plan as specified by your organization.

Lesson 5: Restraint Order

- This lesson may be removed if your organization does not use accreditation for deemed status purposes and use Lesson 6 instead.
- You may wish to add-on your organization's policies and procedures that define "as soon as possible" (related to a restraint order).
- You may wish to add-on your organization's guidelines for the appropriate discontinuation of a restraint.
- You may wish to add-on your organization's policy that defines the situations in which a restraint may be initiated before receiving an order.

Lesson 6: Restraint Order – The Joint Commission

- This lesson may be added if your organization does not use accreditation for deemed status purposes.
- You may wish to add-on your organization's policies and procedures.

Lesson 7: Monitoring and Assessment

- This lesson may be removed if your organization does not use accreditation for deemed status purposes and use Lesson 8 instead.
- You may wish to add-on your organization's policies for appropriate intervals for assessment and monitoring.

Lesson 8: Monitoring and Assessment – The Joint Commission

- This lesson may be added if your organization does not use accreditation for deemed status purposes.

Lesson 9: Documentation

- You may wish to add-on additional elements of documentation as specified in your organization's policy.

Lesson 10: Management of Violent or Self-Destructive Behavior

- This lesson may be added to the course for your organization.

Lesson 11: Restraint or Seclusion Order

- This lesson may be added to the course for your organization.

Lesson 12: Patient/Resident Evaluations – The Joint Commission

- This lesson may be added to the course for your organization.

Lesson 13: Monitoring and Assessment – The Joint Commission

- This lesson may be added to the course for your organization.

Lesson 14: Simultaneous Use of Restraint and Seclusion

- This lesson may be added to the course for your organization.

Lesson 15: Reporting

- You may wish to display the contact information for the appropriate personnel.

Lesson 16: Conclusion

- You may wish to display the contact information for the appropriate personnel.

Slips, Trips & Falls

Lesson 2: Prevention of Slips, Trips and Falls on the Same Level

- You may wish to display the contact information for the appropriate personnel.
- You may wish to add-on your organization's policy and procedure for completing a work order.

Lesson 3: Prevention of Slips, Trips and Falls from Different Levels

- You may wish to display the contact information for the appropriate personnel.

Lesson 5: Reporting

- You may wish to add-on your organization's policy and procedure for reporting slips, trips and falls.

TB Prevention

This course has been created for clinical employees. We encourage you to use the “Infection Prevention and Control for Non-Clinical Employees” course for your non-clinical employees.

Lesson 4: Prevention of Tuberculosis

- You may wish to add-on more information about your organization's TB control plan, including employee screening information.

Lesson 5: Unprotected Contact

- You may wish to add-on your organization's policy and procedure regarding unprotected contact with TB disease.
- You may wish to display the contact information for the appropriate personnel.

Lesson 6: Conclusion

- You may wish to display the contact information for the appropriate personnel.

Rights and Responsibilities Series

EMTALA

Lesson 6: Availability of On-Call Physicians

- You may wish to add-on your organization's policies and procedures regarding on-call physicians.

Lesson 8: Conclusion

- You may wish to display the contact information for the appropriate personnel within your organization.

FACTA Red Flags

Lesson 2: Identity Theft Prevention Program

- You may wish to add-on your organization's policies and procedures regarding the identification of Red Flags – specifically from receipt of warning from a Consumer Reporting Agency or suspicious documents.

Lesson 3: Identity Theft Prevention Program, cont.

- You may wish to add-on your organization's policies and procedures regarding the identification of Red Flags – specifically from receipt of suspicious personal identifying information or unusual use of an account.

Lesson 4: Preventing and Mitigating Identity Theft

- You may wish to add-on your organization's policies and procedures regarding the appropriate response to detected Red Flags.

Lesson 5: Additional FACTA Requirements

- You may wish to add-on your organization's policies and procedures regarding a notice of address discrepancy.

Lesson 6: Conclusion

- You may wish to display the contact information for the appropriate personnel within your organization.

Healthcare Compliance

Lesson 6: Conclusion

- You may wish to display the contact information for the appropriate personnel within your organization.

HIPAA

Lesson 5: Privacy Practices Notice

- You may wish to add-on your organization's privacy practices notice.

Lesson 12: Conclusion

- You may wish to display the contact information for the appropriate personnel within your organization.

Pain Management

Lesson 7: Joint Commission Requirements

- You may wish to remove this lesson for your organization.

Lesson 8: Conclusion

- You may wish to display the contact information for the appropriate personnel within your organization.

Sexual Harassment

This course offers education for both employees and supervisors. Students select their role within an organization at the beginning of the course to receive education specific to their needs.

Lesson 3: Prevention of Sexual Harassment for Employees

- You may wish to add-on your organization's anti-harassment policy and complaint procedure.

Lesson 4: Reporting and Correction of Sexual Harassment for Employees

- You may wish to add-on your organization's anti-harassment policy and complaint procedure.

Lesson 5: Prevention of Sexual Harassment for Supervisors

- You may wish to add-on your organization's anti-harassment policy and complaint procedure.

Lesson 6: Reporting and Correction of Sexual Harassment for Supervisors

- You may wish to add-on your organization's anti-harassment policy and complaint procedure.

Lesson 8: Conclusion

- You may wish to display the contact information for the appropriate personnel within your organization.

Workplace Diversity

Lesson 10: Reporting and Correction of Discrimination

- You may wish to add-on your organization's anti-harassment policy and complaint procedure.

Lesson 11: Conclusion

- You may wish to display the contact information for the appropriate personnel within your organization.

Workplace Violence Prevention

Lesson 3: Workplace Violence Prevention

- You may wish to add-on your organization's anti-harassment policy and complaint procedure.

Lesson 6: Joint Commission Requirements

- You may wish to remove this lesson for your organization.

Lesson 7: Conclusion

- You may wish to display the contact information for the appropriate personnel within your organization.

Private Courses (Course Center)

Overview

A private course is any course added to the *careLearning* Learning Management System (LMS) that is written and created by your organization, for the sole use of your organization. Included in the price of your *careLearning* system purchase is the ability to create an unlimited number of **standard** private courses at no additional cost.

In order to take advantage of free unlimited private courses, you must learn and understand the process for authoring a course.

Authoring a Private Course

Authoring a course is a four (4) stage process:

- Content Creation
- Content Review
- Publication
- Final Review

Content Creation: You start by writing your course content and placing it in a PowerPoint. Any video, Word Document, PDF File, Flash, and other formats will need to be hosted outside of *careLearning* and a hyperlink provided in the PowerPoint.

The sequence and flow of your course is important because each slide will display as a screen online, much like reading a book. Additionally, do not overcrowd your slides, as this may cause your course to be less effective. White space allows important information to stand out. Also, keep in mind that color and graphics will be exactly as you make them. You must use the “Click to add title” box within PowerPoint for your slides to be titled appropriately in the course Table of Contents. If not, the title will default to the slide number. Providing slide titles will make the Table of Contents within the course easier for your students to navigate. Slide transitions will not convert into your course. Some animation is supported but requires additional setup and is not required.

Upload your PowerPoint course content to Course Center. You may create a test on Course Center as well.

TIP: *careLearning* provides a private course library so that organizations can share content. Before writing a new course from scratch, check for that title in the library. You may still edit the course as needed but it is a time saver not to have to begin from a blank paper!

NOTE: It is the organization's responsibility to determine if content they desire to use within a private course has copyright protection. *careLearning* is not responsible for any copyright infringements, nor do we monitor your content. If an organization is concerned about copyright infringement, consider obtaining written permission from the content owner whenever possible.

Content Review: Once your course has been uploaded, you can review the content yourself and share the content with others in your organization to look for errors. This is done in Course Center by adding reviewers.

Helpful hints for reviewing content:

- Check Grammar and Spelling carefully
- Make sure there is good use of white space in the content
- Avoid busy backgrounds that might make the text hard to read
- Review all questions and correct answers

During review, the course is not available to your employees and will not be deployed until you have authorized the course as being correct.

Publication: Next, the course is submitted to *careLearning* to be published to the LMS via Course Center.

- Once the courses are submitted through the tool for publishing, courses are published in the order received by *careLearning*. All courses will be installed and made available within one business week; however this is usually completed in just a day or two.
- Revisions are also important to consider in your timeline. If you have not reviewed the content thoroughly, this may cause several rounds of publishing that are held to the same publish time as a new course.

Final Review: The installed course is then available to you for review in the LMS to be certain the course is setup and functioning appropriately, not for the purposes of content review. During final review, the course is not available to your employees and will not be deployed until you have authorized the course as being correct.

Once you have approved the course for use, it is ready for you to add to your curriculum and to register individuals in your new Private Course.

Private Course Options

During the setup of your Private Course you may want to evaluate the different options a course can have. Below you will find some of the options you may choose from. Standard courses are unlimited and are at no additional charge. If you would like to use

more advanced options they can be purchased at an hourly rate of \$100 per hour, which is billable in half-hour increments.

Below you will find a feature chart explaining which features can be used in standard private courses.

	Standard	Advanced
Question Feedback	◆	◆
Survey	◆	◆
Videos	◆	◆
Narration	◆	◆
Unlimited Test Questions	◇	◆
Certificates	◇	◆
Flash	◇	◆

- **Question Feedback:** Question feedback in a test allows you to provide additional instruction to the student after they answer a question.
- **Survey:** A survey can be added by including a hyperlink to a created survey in your course. Services like [SurveyMonkey.com](https://www.surveymonkey.com) or [eSurveysPro.com](https://www.esurveyspro.com) are popular and free ways to survey in Private Courses.
- **Videos:** You may choose to include a video clip(s) in a private course. This is done by adding a hyperlink to the video on a slide of your PowerPoint. You must host the video on your own internal/external web server or through a 3rd party hosting service. It will be linked within the course and the students will seamlessly be able to access it.
- **Narration:** Narration is used by recording a speaker's voice to be played with each slide. You must use the built in narration tools of PowerPoint to include it.
- **Unlimited Test Questions:** You can configure test specific options like: question pools, randomization, and passing percentage. Standard questions include: multiple choice, select all that apply, fill in the blank, matching, and true & false. Advanced questions include: essays and picture questions, in addition to the options available with standard questions.
 - **Post-Test:** A post-test is an assessment that can be added to the end of your course.

- **Pre-Test:** Pre-Tests allow you to present your Post-Test before the course material. This provides the student a means to “test out” of the course.
- **Certificates:** Standard certificates are documents that can be accessed from a student’s transcript on the LMS. These documents indicate the course completion date, course title, and student’s name. Custom certificates are available as an advanced feature and can be made with special wording, custom logos, and additional information.
- **Flash:** Use of Flash provides the ability to add advanced animations or user interactive elements to your course. These are files that you can create with Flash software and include as part of the course content.

FAQ's

Q. How many seats can I have for my Private Courses?

A. The number of students eligible for a private course cannot exceed the number of seats purchased for your Learning Management System package.

Q. What does careLearning consider a standard course?

A. See the private course options feature chart.

Q. Will I be able to review my course before my students begin taking it?

A. Absolutely! You will give the final approval for your course(s).

Q. Can I have video in my course?

A. Yes. However, you must host the video through a 3rd party hosting service or on your own internal/external web server. It will be linked within the course and the students will seamlessly be able to access it.

Q. Can I use other SCORM 1.2 compliant authoring tools?

A. Yes. Some organizations have elected to do this so they can control the course production process. We recommend a test course at first so that any settings used in publishing can be tweaked ahead of any deadlines you might have.

A popular authoring tool is Articulate. Articulate is available for purchase through www.articulate.com. Here are some facts to consider when deciding between SCORM compatible course software:

- The courses will work on most of the LMS's in existence today therefore offering greater opportunity for portability.
- Articulate is a user friendly program that installs as an add-on to Microsoft PowerPoint.
- If you purchase Articulate, the training and support will also come from them.
- You will want to include in your planning some added time that can be used for testing the courses you've created so that you can ensure the courses are tracking properly before you assign them to students.
- If you are considering purchasing such a tool, contact Nick Oldaker, Director of Development and Information Technology, at 866-617-3904 and he will be happy to help you come to the best decision for your organization.

Q. How many course authors can create content in Course Center?

A. An unlimited number of individuals can author courses in Course Center.

Q. How many individuals can I assign to review a course?

A. You may assign an unlimited number of individuals to review a course in Course Center.

3rd Party Content

Courses Purchased from other Vendors (3rd Party Content Providers)

If your organization wishes to purchase courses from another content vendor (3rd party provider) and place it on the *careLearning* system there are specific steps to follow to ensure a successful procedure.

- Contact *careLearning* before you purchase or sign a contract with the 3rd party content provider.
- We will work with the vendor to “test” the compatibility of the course on our system and determine the amount of time that will be required to ensure functionality.
- You will be informed of the results of the test, including any applicable fees if the course requires additional work from *careLearning* to ensure proper functionality. You can then determine if you want to proceed with *careLearning* hosting the course.

Failure to comply with these steps could result in the courses not functioning properly on our system. *careLearning* is not responsible for any costs incurred if you have failed to follow this policy.

Please Note: We have had great success working with many 3rd party content providers. However, we have encountered content providers that claim that their course will work on “any” system, only to find that is not the case. There are many variables when working with 3rd party content that we can help you navigate. We are happy to assist you prior to signing any contracts.

Course Curriculum and Groups

What is the Curriculum Feature?

The use of the curriculum feature allows you to set up different course requirements for different types of employees at your organization. Setting up a curriculum can allow you to have one group of departments or job codes taking all Health and Safety courses, while another group of departments or job codes may only be required to take a few of the courses. Curriculum makes this your decision. In addition you can set up a curriculum for new employee orientation which is different than the curriculum they would be required to take after their first year.

Before sitting down to create a curriculum for your facility, you will want to make some preliminary decisions:

1. Should everyone get all the courses that our facility is offering through careLearning? If the answer is yes, you will only need to create one curriculum, for example: "Mandatory Education – All Employees".
2. Are there specific courses that only specific departments or job codes will get, for example: "Clinical Employees", "Non-Clinical Employees"?
3. Will I have special rules for new employees? Will my new employees be exempt from any of the courses we are going to offer our existing employees? Will they have any special course assignments that our existing employees will not have?
4. Will I assign the courses by department or job code? While it is simplest to assign the courses by either one or the other, you do have the choice of choosing to use both when defining your curriculum.

This article contains examples of each of the ways curriculum can be assigned and worksheets to guide creating your own curriculum.

"Offline" and "Online" Curriculum

You can work on building curriculum in advance of when you want to release the courses to your employees. For this reason, our product has both "Online" and "Offline" Curriculum.

Online is considered "live", meaning as employees are introduced to the database the rules are processed and they are given the courses outlined in the curriculum rules.

“Offline” is not “live”, allowing the administrator to work on and review the curriculum without the employees receiving any of the new courses.

Here are some examples of when “Offline” mode might come in handy:

- An organization has almost completed its contract year and is beginning to anticipate what might be changed in the upcoming year. There might be changes to what departments or job codes are getting the existing courses, any new course offerings that are being added, etc. You can use the “Offline” mode to build the new curriculum for the next contract year. On your contract renewal date, you can retire your existing curriculum and change the status of your “Offline” curriculum to “Online”.
- An organization creates private hospital-specific courses and releases them throughout the year. As someone is creating, reviewing or publishing the courses, another person can be pre-building the new curriculum for the course or creating a modified curriculum version of an existing curriculum that would have the course(s) added. When the courses have finished Final Review and are ready to be released the curriculum can be changed to “Online” so that employees can begin getting their new courses.

New Employees and Curriculum

There are numerous ways organizations handle their new employees, there are no right or wrong answers. There are organizations that do not treat their new employees differently in terms of their online classroom and if your organization does not, then most of what is said in this section may not apply to you.

There are those organizations that will exempt their new employees from getting any online courses their first year because they prefer them to go through live orientation only. If that is the case for your organization, you will not need to be concerned with curriculum rules for new employees. You will set up an “enrollment exemption” for the set number of days new employees are exempt from online courses and they simply will not receive a classroom until that period of time ends. However, they are still added to your database so that they can be tracked in Events and TrackIt.

When it comes to special curriculum settings for new employees, generally speaking there are two types of rules you can create that tell the system how to handle your new employees: one is an exemption rule and the other an orientation course assignment rule:

- The exemption rule will allow you to exempt new employees from taking some of the courses an existing employee would for a set period of time decided by your organization.

- The orientation rule is exactly the opposite; it will allow you to provide a specific set of courses to only new employees.

Let's look at some examples as to how each of these rules can be applied independently and in conjunction with one another. Imagine the following conversation taking place between 3 administrators of careLearning that come from different hospitals:

Mary: "My organization allows new employees to take all of the courses online except a select handful in which they need more in-depth classroom instruction. We use an exemption rule that states the new employees will not get those courses for 365 days as their orientation classes cover them for the first year of their employment."

Brenda: "Our organization does not exempt new students from any of the courses. We feel the online courses cover everything needed for both new and existing employees so we want them to take it online so their completion can be automatically tracked like everyone else. However, there are supplementary courses that we give to our new employees. We use an orientation curriculum that will give those courses to them without effecting existing employees and without having to manually track who is a new employee and who is not."

Tom: "We approach it both ways. We use an exemption rule to keep our new employees from getting some of the courses, but we also use orientation curriculum to provide them with supplemental information."

As you can see, *careLearning* strives to accommodate many types of preferences when it comes to how education is handled. That being said, if your organization still has additional requirements to consider, please contact your technical support representative.

Successfully Planning Curriculum

Curriculum can be pretty simple and straightforward, but it can also be turned into something very complex. The simpler it can be kept the easier it will be when you have to explain it to others in your facility. Having a good guideline of what you are trying to accomplish is much harder than making the actual settings in the program. Here are some tips for successfully planning your curriculum:

- **Work from your largest groups to your smallest.** It helps if you find all the greatest things in common first. As mentioned in the beginning of this guide, decide what courses are offered to everyone and you can use this as your first curriculum, titled something like "Mandatory Education – All Employees".
- **If it can be consolidated it should be.** Following the same theme, try to make sure you are not creating too many special curriculum in hopes of saving a few people from taking a single course. This usually results in having so many

curriculums that it begins making it difficult for the administrator to understand if there is a problem and being able to explain it.

- **If you are creating rules that are special to new employees you may have to divide curriculum to accommodate the exemption rule.** For example, let's say that your "Mandatory Education - All Employees" curriculum has the following courses in it: Fire Safety, Electrical Safety, Disaster Preparedness, and Hazard Communication. If new employees get everything but Hazard Communication from that list, a new curriculum might have to be created. In the spirit of keeping it simple you might decide it is not worth having to create that extra curriculum.
- **Use the worksheets provided at the end of this article.** You can use the worksheets at the end of the article to help organize your thoughts before making your curriculum settings. careLearning Technical Support will provide training on making the settings in the system. We are also happy to look over these sheets prior to you setting up your curriculum and provide helpful suggestions on simplifying this process.

Completing the Curriculum Worksheets

The next section will show you some example curriculum. If you get lost or have questions along the way, don't forget to contact careLearning Technical Support at 866-617-3904 or email support@carelearning.com.

Here are some things to note about the examples provided:

- While we're showing the department and job code ID numbers, you may lay it out using the actual names or titles
- Obviously, based on the size of your organization you may have a long list under these curriculum to list out on the worksheets
- If you do not have job codes or do not add them to the AMS (it is optional), then you are not able to assign curriculum using job codes and will only be able to use departments
- You may have a need to go further than just straight departments and job codes. If you do, then you will need to utilize the careLearning "Group" feature which can be discussed with technical support if needed. An example of this could be:
 - **RN / LPN Curriculum**
Job Code: 120 "but only in" Departments: 100, 125, 150 and Job Code: 130 "but only in" Departments: 100, 125, 150
- You can assign curriculum based upon departments, job codes, groups or any combination of the three
- Any overlap will be automatically handled by the AMS. In other words, no one will have duplicate courses assigned to their classroom
- In order for a person to have all their required courses, they may end up being assigned to multiple curriculum
- When answering yes to the question "Do new employees get these courses?" keep in mind they will only receive them if their job code, department, or group dictates it. It does not mean ALL new employees will receive these courses.

Example of Curriculum by Department

<i>Curriculum Name</i>	<i>Who qualifies?</i>	<i>What courses?</i>
Mandatory Education	All departments	<ol style="list-style-type: none">1. Fire Safety2. Electrical Safety3. Hazard Communication

Example of Curriculum by Job Code

<i>Curriculum Name</i>	<i>Who qualifies?</i>	<i>What courses?</i>
Clinical Employees	Job Codes: 500 RN 501 LPN 709 Respiratory Therapist 710 Physical Therapist	<ol style="list-style-type: none">1. Bloodborne Pathogens2. TB Prevention3. Isolation and Standard Precautions
Non-Clinical Employees	Job Codes: 820 Coder 845 IT 900 Electrician 823 HR Generalist	<ol style="list-style-type: none">1. Infection Prevention and Control for Non-Clinical Employees

Example of Curriculum for new hires that need additional online courses only during their first year of employment

<i>Curriculum Name</i>	<i>Who qualifies?</i>	<i>What courses?</i>
New Employee Online Orientation	All Departments, only employees hired within 365 days	<ol style="list-style-type: none">1. Time Card Procedures2. Dress Code Policy

Example of Curriculum for courses that should only go to existing employees that have been with us for more than a year. This is helpful for organizations that do not want their employees to take specific online courses during their first year of employment due to instructor-led orientation.

<i>Curriculum Name</i>	<i>Who qualifies?</i>	<i>What courses?</i>
Seasoned Employee Refreshers	All Departments, only employees hired beyond 365 days	<ol style="list-style-type: none">1. Code of Conduct

Using Groups in Curriculum

A Group is a collection of individuals organized in the AMS to allow for quick assignment to activities (courses, live events) and filtered reports. The Groups feature allows you to create as many new groups as you wish based either on employee names or any combination of departments and job codes. Some specific examples would include:

- A need to group individuals that span multiple departments or job codes or both. For example, in many organizations RNs are not grouped together in one department or under one job code, but rather span multiple departments within the organization and may have different job codes.
- Grouping individuals based on their actual names. A good example of this would be if there was a special task force set up within the organization. Job codes or departments have nothing to do with identifying that group of people; it has to be done by selecting the persons' names.

Once a group is set up, you can choose to include it in your curriculum as you would a department or job code.

The next pages contain curriculum worksheets. Simply reuse each worksheet as many times as needed.

What is a Group?

A Group is a collection of individuals organized in the AMS to allow for quick assignment to activities (courses, live events) and filtered reports. The Groups feature allows you to create as many new groups as you wish based either on employee names or any combination of departments and job codes. This guide has been created to help you make decisions about how to classify your employees into groups.

When your organization's data was first loaded to the AMS, departments were required as the most commonly used form of dividing an organization. Although not required, we also highly recommended you supply job codes. You may find you still have a need for further divisions beyond departments and job codes. Some examples could include RNs, LPNs, East Campus, West Campus, Support Staff, etc.

Why Should I Use a Group?

Here are some reasons why it might be necessary to build a group:

- Quickly assign items such as courses, events, and TrackIt items.
- Ease of reporting. Rather than selecting each department and running separate reports on each, you can choose to run reports by Group.
- Both the job code and Department are needed for identifying the employees. For example, if you wanted to make a group for Administrative Assistants that work in clinical departments because they will get different courses than ones who work in non-clinical, then you can select the Administrative Assistant job code and then select all the clinical departments.

Groups can be time consuming to create, but the key is to only have to go through that set-up one time and be able to benefit from it over and over for weeks, months, and years to come. Once the work has been done to create that group, items can be assigned by choosing to select the group rather than having to go back through and make all the selections for departments and job codes time and time again.

The ability to group individuals based on their actual names rather than on rules based on job codes and departments. This is called a manual group and is discussed in the next section.

Types of Groups

There are two types of groups: **Automatic** and **Manual**. There are special groups for **Department Managers** and **New Hires**.

Automatic Groups are based on rules you set up. Once you define those rules, employees will be routed to the groups automatically with no further intervention from

you.

An example of this could be that in most organizations RNs typically span multiple departments within the organization and may have different job codes. When creating an RN group, you can base these rules on departments, job codes, or both. Now, anytime you want to assign something or run reports on RN's it's already there bundled for you.

Manual Groups are created based on names of employees. No one becomes part of the group without you deliberately assigning them. An example of this would be if you were going to assign and track things about a task force, you would manually select the names of the members of this task force. If someone new is being added to the task force, they would have to be added by hand.

Department Managers are a special type of manual group. This group has the same properties of any other group in that assignments can be made (Courses, Events, TrackIt, etc) and reports can be performed on this group. However, there is the added feature of also maintaining the eRegistrar log-in permissions as well.

New Hires are a special type of group. Once you define how many days an employee is considered a new hire, employees will be assigned to the groups automatically with no further intervention from you. To use this group you must have hire dates in your AMS (It resides under Setup/Preferences > System Setup Options).

Example Automatic Groups

As previously discussed, automatic groups allow you to create rules based on job codes, departments, or both. Once you set up the rules for the group, the AMS will follow those rules when you add new employees and will automatically place those individuals in the group for you without further intervention. The below examples are intended to help you understand the format of the worksheets you will use to organize your groups.

Example of Group by Job Code

Group Name: Nurses

What Job Codes will be included in the group?

500 Registered Nurse

501 Nurse Graduate

709 Nurse Aide Student

710 Nurse Aide

Example of Group by Department

Group Name: Non-Clinical

What Departments will be included in the group?

182 – Human Resources

185 – Business Office

192 – Admissions

Example of Group by Both Department and Job Code

Group Name: Patient Care

What Departments/Job Codes will be included in the group?

Anyone in the following departments:

1.31 Labor & Delivery

1.321 Operating Room

1.324 Oncology

1.36 Ob / Gyn

1.309 Newborn Nursery

1.40 Bloodbank

1.621 GH Post Anesthesia Care

1.622 Sleep Lab

Anyone with the following job codes:

2.44 Pharmacy

3.45 Laboratory Services

Manual Groups

Manual groups are built based on specific people. These should only be used when you cannot define a group based on their job code, department or both. Once you set up a manual group, you must maintain it by hand and will have to add new employees manually when they should be placed in the group. These work very well when you have a task force in your hospital or other specially designated groups that are not specifically defined by departments or job codes.

Example of a Manual Group

Group Name: Emergency Codes Task Force

Who will be included in the group?

Terry Schaffer, Environmental Services Department, Job code 304

Mindy Sullivan, Director of Nursing, Job code 607

Janice Strapp, Director of Human Resources, Job code 203

Michael Bermann, Infection Control Specialist, Job code 102

Peter Williams, Education Services, Job code 586

The next pages contain group worksheets for each type of group based on examples provided in this document. Simply reuse each worksheet as many times as needed to complete all group listings.

MANUAL GROUPS WORKSHEET

Organization Name:	Contact Name:	Contact Phone:
Group Name:		
Employee Name	Notes	

Use the optional Notes column for any additional explanation where needed.

AUTOMATIC GROUPS WORKSHEET
BASED ON JOB CODE AND DEPARTMENT

Organization Name:	Contact Name:	Contact Phone:
Group Name:		

In the tables below, list all the Departments and Job Codes to be **INCLUDED** in this group.

Department ID	Department Title

Job Code	Job Title

NOTE: If there are individuals that do not qualify for this group but meet the rules you may choose to manually exclude them in the AMS.

Final Thoughts

This task tends to be underestimated and can be very time-consuming. Once completed however, it is set and requires little, if any, maintenance. It is possible to get carried away with this feature and create more problems. A grounded, well-thought-out plan will truly pay off for this feature.

ID Badge Scanning

Using the *careLearning* ID scanning feature allows you to scan the ID badges of your employees at live events and then load them directly into the AMS. *careLearning* currently supports ID Badges of the following coding types:

- Bar code
- Magnetic strip
- Proximity
- Infrared

Using this feature usually requires that the scanners are purchased directly from *careLearning* (contact technical support for pricing), however if you already have scanners that are able to produce a .txt file then you may be able to use those scanners with the AMS. All three types of the *careLearning* scanners are battery operated and do not require any wires to be pulled or any changes to your current ID badge software system. In fact, under normal circumstances your current ID badge system is not used at all for this *careLearning* feature.

We ask that you first send *careLearning* a sample ID badge with a number programmed to it, so that we may determine proper compatibility with our scanners prior to your purchase. While not common, we have seen some bar code badges that were proprietary and would not work with our scanners.

The scanners will need an open com port and will need access to the c:\ drive on those PCs as well. Occasionally devices like PDA's may already be occupying a com port, and occasionally we have come across organizations that do not allow c:\ drive read/write capabilities. It is your organization's I.T. staff that is responsible for providing you with an appropriately capable computer. An organization can purchase as many scanners as needed. However, in most organizations currently using the system, one or two scanners seem to cover their needs.

Scanning Options for Organizations that do not use ID Badges

It is worth noting that you have the ability to scan bar codes next to employee's names from a paper roster that is produced by the AMS. This can have applicability for organizations without name badges or with name badges that do not have security encoded ID information on them. In fact, we have organizations that use the roster scanning even though their badges can also be scanned.

Technical Requirements

careLearning has made a deliberate attempt to minimize the work required by your I.T. staff for the setup and continued maintenance of this educational product. Under most circumstances, once setup and operational, I.T. staff will have little to no ongoing involvement in the product. This of course varies from organization to organization and does not take into account that your organization may have a policy that makes it a requirement for I.T. involvement at all times. Ultimately, the amount of work required will depend on how up-to-date your organization maintains its equipment.

The following information pertains to only the “requirements” to use the product. There are other features like eRegistrar and ID badge scanning which are optional, and therefore are not contained on these pages. There are separate documents available for the optional features. The areas to review are as follows:

- Internet Access
- PC Readiness
- Network Access
- Employee File Format Specifications

Internet Access

One of the first questions to answer is how will your employees get to the Internet to take the courses? It may be that current access to the Internet at your organization is very limited to senior management and maybe some select managers and employees. Now you are looking at all of your employees having access to the Internet.

Where will they do this from?

While different at every organization, there are two basic setups. One is that employees gain access from a PC in their own department with each department having at least one PC with Internet access. The other is the use of a centralized computer lab with one or many PCs with Internet access. Which works best can only be determined by you and is directly related to the number of employees in the organization.

Is there enough bandwidth?

Calculating the bandwidth requirements for an organization is not an easy thing to do. At best it is an educated guess as to the demands on the system at any given moment in time. On average it is safe to say that bigger is better, but that is not always possible due to financial costs or local availability. Currently the courses in the Health & Safety Compliance and Rights & Responsibilities Series are the courses in the *careLearning* catalog that require above average connectivity because these courses are designed using Flash. Simply put, they do not work with a 56k dial-up connection, but they work fine with anything above that.

Our recommendations to anyone concerned about bandwidth utilization are as follows:

1. The courses at *careLearning* will probably not cause more load on the network than the same number of people actively browsing the Internet.
2. If possible, have your router choke the pipe used for outgoing browser connections. This will allow you to set and minimize the impact that browsing will have on your pipe. This is possible with CISCO routers. You might have to get your provider to institute it on their end.
3. Use a caching proxy server on the organization end. This way frequently referenced files like the training material, would be cached and retrieved locally and not repeatedly take up room on your Internet line.
4. Get a larger pipe to the Internet. Although T1's are nice, you might be able to convince your ISP to give you a measured T3 for about the same price. This would allow for bursty traffic but still cap your costs. If you are a smaller organization, a T1 would be great, but again, not required. In today's market, many ISP's are willing to negotiate deals as to not lose customers.
5. Look around and limit other network consuming traffic to the Internet. We've seen articles where 20-60% of traffic in business use isn't really being used for business. MP3 downloads, YouTube, stock tickers, and weather radar were frequent culprits.

What about Firewall Issues?

Here is the information about ports and security:

1. You will need to allow access to port 80 on our server. This is the normal port used by browsers to contact web servers so you most likely already allow that.
2. If you will be using e-commerce to buy extra courses with credit cards (most organizations do not), then we switch people to HTTPS protocol, which runs on port 443 on our server. Most sites allow people to access web servers on ports 443 but we have seen instances where they don't, particularly if they monitor all transactions since SSL can prevent such monitoring. If you do not wish to have port 443 open, this will not affect the normal use of *careLearning* by your organization.
3. Most organizations choose to place the “*.carelearning.com” address on the whitelist of their firewall, proxy server, or other web filtering appliance so that communication is permitted.

PC Readiness

Your PC Readiness is divided into two groups: Those PCs that will be used by all the employees to access the Internet and their courses (Student PCs); and those PCs that will be used by those individuals that have the responsibility of managing the product (Administrator PCs).

Student PCs

The courses that currently make up the ***Health & Safety Compliance and Rights and Responsibilities*** series are multi-media-based training courses that utilize motion and sound via 'Flash' to deliver content over the Internet. Consequently, you will need a personal computer(s) equipped with:

- A sound card
- Access to the Internet with any connection above a 56K
- Up-to-date Web browser such as Internet Explorer 6+ or Firefox 3+
- Up-to-date version of Adobe's Flash software (a free download)

Browser Requirements

We make extensive use of JavaScript so you will have to have that enabled in your browsers' settings. We also use cookies, so that too will need to be enabled in your browsers. **The use of cookies is not optional.** They are needed by the LMS for navigation and tracking. The product will not function without them.

Desktop and Intranet Shortcuts

The main home page for *careLearning* can be found at: www.carelearning.com
You can use shortcuts to this page on either the desktop or an Intranet page. We highly recommend only linking to the main page or a page provided to you by *careLearning*.

Student PC Note

As with most personal computing applications, your *careLearning* experience will be optimized by using a faster computer, with up-to-date software and a quality Internet connection. Since *careLearning* has no control over these choices, we cannot guarantee satisfactory performance on every PC.

Administrator PCs

Those that have the responsibility of managing the education at your organization will need access to *careLearning*'s two (2) tracking systems. The Learning Management System (LMS) is located on the Internet and is the same system the employees log into to take courses. Use of the LMS has the same minimum requirements as the Student PCs above.

The second system, called the Administrative Management System (AMS) is a split database application with the backend (server AMS) located on one of the organizations servers (discussed below) and the front end (desktop AMS) located on the end users PC. The AMS is multi-user capable so these specifications are for any PC that would have the desktop AMS installed.

Minimum PC Requirements:

Microsoft Access - *careLearning* only supports **Access 2003, 2007, 2010**. Prior versions such as Access 2002 are not supported. Support also includes the free runtime version of Access 2007 and above. Please make sure your installation of Microsoft Access or Microsoft Office is up to date with the latest service pack. Failure to do so will cause the import process to not work properly.

- Office 2003 – Service Pack 3
- Office 2007 – Service Pack 3
- Office 2010 – Service Pack 2
- Microsoft Windows XP or later operating system (includes Windows 7 and 8) with Microsoft .NET Framework 3.5 SP1.
- 1 GHz or higher processor
- 512 MB of RAM minimum, 1 GB highly recommended
- 200 MB of available hard-disk space
- Screen resolution 800 x 600 required, 1024 x 768 recommended
- We recommend that your administrators have permission to install software on their local computer

Notes

AMS performance is highly dependent on the end users PC. The individual(s) responsible for this administration should have the most current PC available. The above requirements are considered minimum. Since *careLearning* has no control over the hardware and software choices your organization makes, we cannot be responsible for poor performance which is a direct result of older hardware. Additionally, there are runtime versions of Microsoft Access 2007 and 2010 that are compatible with the AMS. Anyone that will need to use the AMS when there is no fully licensed copy of Microsoft Access available will be required to install one of these runtimes on their PC. **The use of Wi-Fi while connected to the AMS is not recommended.**

Network/Server Access

As previously mentioned the *careLearning* tracking and reporting system is divided into two separate packages. The Learning Management System (LMS) is on the Internet and requires nothing more than that information discussed under the Internet Access section. The second half of the package is the Administrative Management System (AMS) and again as stated above this software is a split database application with the backend (Server AMS) residing on one of your existing servers as a Microsoft SQL Server 2005 or above database that can be accessed by the product administrator(s).

NOTE: The SQL Server database **must** be backed up on a regular basis.

The Desktop AMS is linked to the Server AMS, which is a SQL Server database. (The AMS is never accessed by your employees and has nothing to do with them accessing their courses online.)

Minimum Server Requirements:

- Microsoft Windows 2000 Server with Service Pack 4 or later, or Windows XP or later operating system (includes Windows 7 and 8)
- Microsoft SQL Server 2005 (or newer) with Management Studio installed. A full version of SQL Server 2005 or newer is recommended but we can support SQL Server Express, which is free from Microsoft. If you already have a SQL Server instance then you can just add a new database to it (see below). If you do not have an existing SQL Server instance then you can either install one to an existing server, desktop, or new server. A SQL database and user account will be created during installation.
 - AMS Database: One SQL Server database, we recommend naming "cL_AMS", will be created inside of SQL Server.
 - AMS User: A SQL Server administrative user account, we recommend naming "cL_Admin", will be created with full unrestricted access to the above AMS Database. Note: this will be a user created inside SQL Server, not Microsoft Windows.
- 600 MHz or higher processor, 1 GHz or higher recommended
- 512 MB of RAM minimum, 1 GB or higher recommended
- 500 MB of available hard-disk space

Final Notes

The AMS is only used for administrative purposes and is not used by your employees to take the courses. **The computers the employees use to login to their Internet classroom do not need Microsoft Access.**

The Server AMS does not require or need a dedicated server. Microsoft SQL Server 2005 Express Edition or newer can be installed if no SQL Server exists.

Depending of the size of your organization, some processes in the AMS may be greatly affected by server processor speed and the means by which your network connects to

the end user. Since *careLearning* has no control over the hardware and software choices your organization makes, we cannot be responsible for poor performance which is a direct result of older hardware, high network traffic, or slow routers/hubs.

As you already are well aware, many factors come into play when it comes to an applications performance. We can only recommend that if you have a choice of servers to place the Server AMS that you choose one of your newer, faster ones if available. The greatest boost to end user performance however comes with a strong desktop PC. The best server cannot make up for a poor desktop.

If you do not have servers or a network in your organization please contact Technical Support for recommendations.

eRegistrar

Our internet/intranet interface, eRegistrar (customize name as you wish), will allow your employees a single source interface for managing their education. Employees can simply log-in with their web browser to perform a number of tasks:

- View what online courses they need to complete and access their classroom to complete them
- View a calendar of upcoming live Events
- Register for live Events
- Run educational transcript reports
- View deadlines, due dates, and more

Department managers also use this tool to get information about employee's progress regarding their education. Access rights are determined by an AMS administrator at your facility.

Here are the requirements needed to use this product:

1. A server or PC with Internet Information Services (IIS) 6.0 or newer installed.
2. An internet/intranet web server with .NET 3.5 SP1 installed. The server will need a onetime installation of runtime libraries for Crystal Reports and AJAX Extensions. Both are provided by *careLearning* during the installation. A license to Crystal Reports is not needed.
3. 100 MB or more of available hard-disk space.

careLearning Technical Support will work directly with I.T. staff by phone on this installation.

File Format Specifications

Importing Employees, Departments and Job Codes

Two files must be created so that you can load or “enroll” your employees into the *careLearning* system. A third file for Job Codes is optional BUT highly recommended. The files described below will be imported into your Administrative Management System (provided to you). Once imported, the AMS will perform many functions including printing letters to your employees to notify them of their username and password.

These files are needed to load your employees, departments and job codes: Both the “department” and “jobcode” files are onetime installs and must be in an Excel spreadsheet. Once loaded, these files are not needed again.

The “enrollment” file which contains all your active employees is used every time you want to update the system. For this file you have a choice of the file format to use based on your internal systems or your own preference. You can choose one of the following and must then follow the instructions exactly. Choose between using a “Tab Delimited” text file, a “Comma Delimited” text file, or an “Excel Spreadsheet” file. Based on your choice, follow the specifications to follow.

Special Note: The 5th, 6th, 7th, and 8th fields in the enrollment file (“date”, “id_badge”, “job_code” and “e-mail” respectively) are optional. If you choose to import a “date”, any legitimate date format will work. The reason that id_badge is used is for those that will use the AMS to record attendance at in-services by scanning their employee ID Badge or the bar coded roster from the AMS. The Job Code field can be very useful for use with the Group and Curriculum features of the AMS. If you are not interested in using these features, then you do not have to include these fields. Also, while not noted below, a 9th and 10th field can be included to import custom student IDs and passwords if you want to supply them rather than have the AMS generate.

We recommend that if this optional data is available to you that you include it in the import file.

Once you have picked the file format you wish to use, follow the directions given to you by *careLearning* technical support as to what to do with these files. Since the product administrators will need the enrollment file often, we highly recommend you build a process that the product administrator(s) can either run on demand or is scheduled to run automatically and save the enrollment file to a specific folder each time. This will allow the administrator of the system to import it with a click of a button, rather than having to browse to import.

File Format Specifications - Enrollment

Create a file of active employees: A file needs to be created from your organization's internal HR or Payroll database system in one of the following formats: Microsoft Excel file (.xls), Comma delimited file (.csv), or Tab delimited file (.txt).

The order and name of the column labels (headers) in the first row of each of the columns **MUST** be exactly as follows:

last	first	ssn	department_id	date	id_badge	job_code	email
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If no information is available for the Optional fields then leave the header intact and the field blank. (Example: Do not enter "N/A")

NOTE:

- last = (text up to 50 characters) the last name of the employee (Required)
- first = (text up to 50 characters) the first name of the employee (Required)
- ssn = (number up to 11 digits) AMS ID number. This does not have to be a Social Security number, just a unique identifier for each employee. (Required)
- department_id = (text up to 25 characters) a unique identifier for the employee's department (Required)
- date = (mm/dd/yyyy) the date of hire (renewal date) or birth date of the employee (Optional)
- id_badge = (number up to 10 digits) badge identification number used for scanning (Optional)
- job_code = (text up to 15 characters) a unique identifier for the employee's job code (Optional)
- email = (text up to 50 characters) a valid email address for the employee (Optional)

This file **MUST** be named "enrollment.xls" or "enrollment.csv" or "enrollment.txt" depending on the file format.

Important Note for Excel Format Users: DO NOT:

- Format the spreadsheet (i.e., no borders, underlines, macros, etc.)
- Name the work sheets (work sheet name should remain "Sheet1")
- Add your name, or the report name, or the facility name, anywhere in the spreadsheet
- Leave any blank rows between any row of data
- Hide any rows or columns of data

File Format Specifications - Departments

Create a file of active Departments: A separate Excel file needs to be created that contains department ID and department name for all active departments. The order and name of the column labels (headers) in the first row of each of the columns MUST be exactly as follows:

department_id	department
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This file MUST be named "department.xls".

- department_id = (text up to 25 characters) a unique identifier for the employee's department (Required)
- department = (text up to 50 characters) the department name or title

Note: If the Department ID's are an Alpha/numeric mix, put all the alpha departments at the top portion of the file.

File Format Specifications - Job Codes

Create a file of active Job Codes: A separate Excel file needs to be created that contains Job Code ID and Job Code name. The order and name of the column labels (headers) in the first row of each of the columns MUST be exactly as follows:

jobcode_id	description
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This file MUST be named "jobcode.xls".

- jobcode_id = (text up to 15 characters) a unique identifier for the employee's job code (Optional)
- description = (text up to 50 characters) the title of the job

Note: If the Job Code ID's are an Alpha/numeric mix, put all the alpha job codes at the top portion of the file.