



## **Product Guide**

*careLearning* is an online education company designed to help healthcare organizations by providing reliable, trusted, 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 the IS Readiness checklist and to create an implementation plan. The following individuals are included in this call:

- Primary User
- Administrative Contact
- I.T. Contact
- Director of Client Success Strategies
- Client Engagement Specialist
- Technical Support Representative

The Implementation Plan will outline each step of the process and provide deadlines for each 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 of completed implementation. You will receive a notice and Renewal Questionnaire two (2) months prior to the renewal date to help you prepare for the renewal call. The renewal call is required to reset your employees to the appropriate courses for the upcoming subscription year. To best prepare for this call:

1. Review your course curriculum in the AMS – Curriculum is critical for resetting the appropriate courses for your employees. Your curriculum review should indicate which courses you want to add, remove, or revise as well as which departments, job codes and/or groups will be included. You will need this information for the Renewal Profile and Questionnaire documents. Please remember that courses will be reset during the renewal call based upon online curriculum only.
2. Create or review private courses – All private courses are created and/or revised by you in Course Center. Please complete the final review and publish courses prior to the renewal call.

3. Complete and return the Renewal Questionnaire – This document will help us meet your organization’s needs.
4. Review the Renewal Profile and inform us of any changes – This document includes the contact persons for your organization, a list of courses you are using as well as any private courses you are retiring, how many employees are to be registered, and the number of seats you have purchased. (Please note that you may add seats now if desired.) This course list should match what you decided upon in your curriculum review.

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. 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, Neglect, and Exploitation  
Bloodborne Pathogens  
Emergency Preparedness  
Electrical Safety  
Fire Safety  
Hazard Communication  
Hand Hygiene  
Infection Control- Non-Clinical  
Influenza  
Isolation and Standard Precautions

Medication Administration  
Medical Radiation Safety  
Moving, Lifting, and Repetitive Motion  
Patient Rights  
Population Specific Care- Adult  
Population Specific Care- Pediatric  
Restraint (or Restraint and Seclusion)  
Slips, Trips, and Falls  
Tuberculosis Prevention

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

Combating Fraud, Waste, and Abuse  
Cultural Competence in the Workplace  
Customer Service  
EMTALA  
FACTA Red Flags  
HIPAA

Medicare Fraud and Abuse  
Pain Management  
Sexual Harassment  
Workplace Diversity  
Workplace Violence Prevention

While these courses are primarily purchased in bundles, you can choose not to use any courses that do not contain information pertinent to your organization's compliance needs. 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.

**Transcripts for each of the courses are available in English and Spanish.** The courses are produced in English and you may elect to use the transcripts to make a Spanish version of the courses as private courses.

Re-writing or changing of any existing information in the Silver and Gold courses is **not possible**. This includes the pre- and post-test questions, quiz questions, and course content. You can customize these courses by adding supplementary organization-specific information, also known as Add-on Material. A more in-depth discussion of the use of attributes appears later in this guide.

In addition to pre-tests and post-tests, quiz questions, to reinforce the material that was taught, can be found at the end of many lessons. Quiz questions are not scored. If a student answers a question incorrectly, they will be directed back to the beginning of the lesson. If the student fails the second attempt, the correct answer will appear.

You can decide whether to permit students to “test out” of a course by passing a pre-test. They will only have one attempt at the pre-test.

If a pre-test is not present or the student does not “test out”, they will have to take the course and complete the post-test.

- If a student does not pass the post-test, they will be advised of the question(s) they answered both correctly and incorrectly and will 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 to meet the passing score.

Both the pre-test and post-test passing scores are defaulted to 100% and can be changed upon request. You can also allow your seasoned employees to “test out” of a course, but not your new hires.

### **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. There are also special rules that can be set for new employees which can exempt them from some courses or give them special courses they need as new hires. You can setup as many curricula as you need to meet your organization’s requirements.

The included Course Curriculum document provides you with examples of how to lay out a curriculum plan for your organization. Like private courses, the amount of time needed for curriculum development tends to be underestimated. Though it is time consuming, a well thought through curriculum will save time and energy in the long run. Once it is completed, it is set to go and requires little, if any, maintenance. A grounded, realistic plan will truly pay off with this feature. If you have any questions about how to set up your curriculum, please contact Technical Support.

### **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 login 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 can also use eRegistrar to get information about employees' progress. Access rights to eRegistrar are determined by an AMS administrator at your facility.

eRegistrar 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 a course that is written and produced by your organization for the sole use of your organization and added to the *careLearning* Learning Management System. Included in the price of the *careLearning* system is access to the Course Center tool 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 should be fully understood before attempting to create private courses.

### **ID Badge Scanning**

This feature allows you to scan your employees' ID badges at live events and then load them directly into the AMS. ID badge scanning requires that your badges contain one (1) of these three (3) types of encoding:

- bar code
- magnetic strip
- proximity

It also normally requires the purchase of the scanner from *careLearning*. Contact Technical Support for pricing information. If you have ID badge scanners already, you may check with Technical Support on your scanner's potential ability to operate with *careLearning's* system.

Prior to purchasing an ID badge scanner from *careLearning*, you must first send us a sample badge so that we may determine proper compatibility.

### **Catalog Courses**

*careLearning* offers a catalog of courses that an individual or organization can purchase and add to their classrooms:

- Individuals can purchase the courses directly from the catalog using a credit card.
- Organizations are encouraged to purchase the courses through Technical Support and to inquire regarding possible bulk purchase discounts.
  - Organizations may purchase through Purchase Order or credit card.

Once a purchase has been completed, Technical Support will create a session for the course/s on the LMS. Your System Administrator may then add the catalog course/s to

a curriculum or directly register students for it. This session will be available for one year from date of purchase. You may purchase additional access to this session during the year. You will receive a notice from Technical Support 2 months prior to the one year from purchase date asking if you wish to purchase the course again for the following year. Technical Support will ask if you want additional purchases placed in the existing session or if you want to wait until a new session is created.

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, contact Technical Support for assistance. If you experience any technical difficulties with a catalog course, please refer to Technical Requirements or contact Technical Support.

## **Events**

The Events feature of the AMS is designed to manage instructor-led and other live, not online, educational activities. There are no limits to the type or quantity of programs you can enter into the Event function. For example, you could enter staff meetings, flu vaccinations, new product demonstrations, etc.

Events capabilities include:

- Pre-registration
- Email notifications
- Event rosters, name tags, certificates
- Staff accessible calendar that provides an easy way to post dates, times and locations
- Self-register for employees and/or managers

## **TrackIt**

The TrackIt feature allows you to keep track of anything with an expiration date, such as professional licenses, licensure renewal, and certifications, and to easily run reports or send email notifications. Reports can be filtered to run by department, job code, license type, and expiration date, etc.

## **Knowledge Center**

Knowledge Center is an online client resource accessed by going to [client.carelearning.com](http://client.carelearning.com). Here you will find FAQs, instructional clips and webinars, dates of upcoming User Group meetings/webinars, access to popular documents, such as course transcripts, and more.

## **Summary**

Each organization is unique and has different needs and goals for using an eLearning solution. Essential to making your implementation and renewal occur in a timely manner is a schedule and coordinated effort by both your staff and *careLearning* staff. While we are very aware that often the time schedule of those you work with are not under your control and therefore the best laid plans can quickly go astray, *careLearning* cannot guarantee the target start date for items listed here which are not in *careLearning*'s

control.

Our experienced technical/training staff stands ready to put their years of experience to work for you. 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](mailto: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 19 courses. The Rights and Responsibilities series (Gold Package) contains a total of 31 courses (the Silver Package and additional 12 courses from the Gold Package). 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 have complete control over which courses appear in your classrooms. You may remove any course that you do not want to have your employees take. If you find a topic is missing you are free to add your own private courses at no additional cost.

The content of your organization's add-on material is created by you. Technical Support will put the attributes into the correct formatting to fit within the *careLearning* course.

### 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 six (6) attributes available in all\*\* of the courses.

They are:

- ❑ Pre-test control: Your organization can decide whether or not to permit a student to “test out” of the course by passing the course pre-test.  
Default Setting: YES
- ❑ Pre-course add-on material: You may wish to add your own information to the beginning of the course. Default: NONE
- ❑ Post-course add-on material: You may wish to add your own information to the end of the course. Default: NONE
- ❑ Closed captioning: Students that are hearing impaired or would like to see the words being spoken may turn on or off “CC” or “Display Text” anytime they wish. This is a student-controlled attribute.
- ❑ Passing Scores: You may determine the score required to pass the pre-test and/or post-test. Default Setting: 100%

- Survey: You may elect to not offer the built-in 2 question survey at the end of the course. Default Setting: YES

\* These attributes are not available for the Medicare Parts C & D General Compliance, Medicare Fraud & Abuse: Prevent, Detect, Report and Combating Medicare Parts C & D Fraud, Waste, and Abuse courses.

### 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.

### **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.

Creating add-on material requires several steps to be followed and some basic principles of the Internet to 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.
- You will need to produce the add-on material such as a policy/procedure and/or additional information in PowerPoint or PDF format.
- The add-on 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 add-on information must be its own file. For example: if you were to add your organization’s procedure for corrective action regarding defective items to the course *Electrical Safety – Lesson 5: Dealing With Defective Items* then you would type out what you wanted to say, save it as a PowerPoint file, name it “es-L5.ppt” (electrical safety-lesson5), and send it to

Technical Support to convert. Technical Support will format and send it back to you to be put on your web server.

- Each lesson's file can contain no more than five (5) PowerPoint slides. If you have more than five (5) slides, we recommend that you create a separate private course so that you might test your employees 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 such a 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 course transcript. The same contact information will appear in each lesson that offers this attribute. This information will be displayed automatically at the bottom of the student's screen. Please note that the space is limited to 50 characters and you cannot use "special" characters such as commas. If you decide to use this feature, provide the appropriate contact information to Technical Support.
- **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. You are not required to add-on optional information.

**In addition to the six (6) available attributes, the courses on the following pages also allow add-on material options within the body of the course.**

Course content is presented in sections called "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.** Each course is always offered in the same order. 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 (optional)
- Learning Unit 5: Lesson 1

\*\* The Medicare Parts C & D General Compliance, Medicare Fraud & Abuse: Prevent, Detect, Report and Combating Medicare Parts C & D Fraud, Waste, and Abuse courses are listed as Slides.

## ***Health and Safety Compliance series***

### **Abuse and Neglect**

#### Lesson 5: Conclusion

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

### **Bloodborne Pathogens – Hospital and Clinic Versions**

**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.

#### Lesson 10: Conclusion

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

### **Electrical Safety**

#### Lesson 6: Conclusion

- You may wish to display contact information for the appropriate

personnel within your organization.

## **Emergency Preparedness**

### Lesson 3: Emergency and Standby Power Systems

- You may wish to remove this lesson from the course if your organization is not a hospital or long-term care facility.

### Lesson 6: Conclusion

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

## **Fire Safety – Hospital and Clinic Versions**

### Lesson 8: Using a Fire Extinguisher

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

### Lesson 10: Conclusion

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

## **Hand Hygiene – Hospital and Clinic Versions**

### Lesson 8: 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: 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 – Hospital and Clinic Versions**

**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 1: Introduction

- Access to the OSHA Bloodborne Pathogens standards (1910.1030) is provided under Resources in this lesson.

### Lesson 9: Transmission-Based Precautions

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

### Lesson 12: Conclusion

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

## Influenza

### Lesson 18: Conclusion

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

## Influenza - Clinics

### Lesson 12: Conclusion

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

## Isolation and Standard Precautions – Hospital and Clinic Versions

**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: 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: The Joint Commission Requirements

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

#### Lesson 18: Conclusion

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

## **Medication Administration**

#### Lesson 11: Conclusion

- You may wish to display contact information for the appropriate



personnel within your organization.

## **Moving and Lifting – Hospital and Clinic Versions**

### Lesson 8: Reporting

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

### Lesson 9: Conclusion

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

## **Patients' Rights – Hospital and Clinic Versions**

### 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 – Infant, Pediatric, and Adolescent**

### 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 – Adult**

### Lesson 3: Care Guidelines: Young – Middle Adult

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

### Lesson 5: Care Guidelines: The Older Adult

- 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.

### **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.

## Lesson 9: 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.

## Lesson 10: Conclusion

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

### **Slips, Trips & Falls – Hospital and Clinic Versions**

## Lesson 5: Reporting

- 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.

## **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 8: Unprotected Contact

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

#### Lesson 10: Conclusion

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

## ***Rights and Responsibilities Series***

## **Combating Medicare Parts C & D Fraud, Waste, and Abuse**

- There are no attributes available for this course.

## **Cultural Competence in the Workplace**

#### Lesson 8: Conclusion

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

personnel within your organization.

## **Customer Service – Hospital and Clinic Versions**

### Lesson 10: Conclusion

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

## **EMTALA**

### Lesson 10: Conclusion

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

## **FACTA Red Flags**

### Lesson 6: Conclusion

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

## **HIPAA**

### Lesson 12: Conclusion

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

## **Medicare Fraud & Abuse: Prevent, Detect, Report**

- There are no attributes available for this course.

## **Medicare Parts C & D General Compliance (To be discontinued 12/31/21)**

- There are no attributes available for this course.

## **Pain Management**

### Lesson 9: 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 8: Conclusion

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

## **Workplace Diversity**

### Lesson 12: Conclusion

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

## **Workplace Violence Prevention – Hospital and Clinic Versions**

### 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.

## Private Courses (Course Center)

### Overview

A private course is any course that is written and created by your organization for the sole use of your organization that is loaded into the *careLearning* Learning Management System (LMS). 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 to your organization.

The following instructions will take you through the process for authoring a private course. It is important to understand the steps involved to take advantage of free unlimited private courses.

### 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 file.
  - Any video, Word Document, PDF file, interactivity, and/or other formats will need to be hosted outside of *careLearning* and a hyperlink to that content provided in the PowerPoint.
    - For example, if you have a training video you want to include in your course, you would insert a hyperlink to that video for students to access the video.
  - Narration for your course is available using PowerPoint's built-in narration tools.

The sequence and flow of your course content is important because each PowerPoint slide will display as a screen online, much like reading a page in a book. To be effective:

- Do not overcrowd your slides with graphics and/or text.
  - White space allows important information to stand out.
- Color and graphics will appear exactly as you make them.
  - Too much color, busy backgrounds, or too many font types can



distract from the content.

Providing slide titles will make your course's Table of Contents easier for students to navigate through the course.

- To title your slides appropriately so that the slide's title will appear in the course's Table of Contents, you must use the "Click to add title" box within the PowerPoint slide.
- Slides without titles will default to the slide's number in the Table of Contents.

Most PowerPoint slide transitions and animations will convert into your online course. Transitions and animations are not required for successful creation of your course or for loading it into classrooms. For more information about which transitions and animations are supported [click here](#).

Once you have your course content set up in PowerPoint, you are ready to upload your course to Course Center.

- In Course Center, you may also create a test or sign-off for your course.

**TIP:** *careLearning* provides a Private Course Library in which organizations can share content. Before writing a new course from scratch, check for the subject in the library. Private course library courses allow you to copy and edit a course for your own use. This can be a real time saver for you!

**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 into Course Center, you can review the content and share the content with others in your organization. You can add as many Reviewers as needed through Course Center.

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**

Following the completed Review, you will submit your course through Course Center to *careLearning* for publishing to the LMS.

- Courses sent through Course Center publishing are published by *careLearning* in the order in which they are received.
- 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 available to you for Final Review in the LMS. Final Review is for checking to be certain the course is setup and functioning appropriately, not for the purposes of Content Review.

Once you have completed the Final Review and 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 are some options for your consideration:

- Standard courses are unlimited and are available at no additional charge.
- More advanced options can be purchased at an hourly rate of \$100 per hour, which is billable in half-hour increments.

This **Private Course Options Feature Chart** explains which features can be used in standard private courses and what advanced course features are available for purchase.

	Standard	Advanced
Question Feedback	◆	◆
Survey	◆	◆
Videos	◆	◆
Narration	◆	◆
Unlimited Test Questions	◇	◆
Certificates	◇	◆
Interactivity	◇	◆
◆ = available	◇ = basic availability	◇ = not available

- **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
  - passing percentage
Standard questions include:
  - multiple choice
  - select all that apply

- fill in the blank
- matching
- true & false

Advanced questions include:

- picture questions
- picture answers
- **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.
- **Interactivity:** The ability to add user interactive elements to your course.

### **Private Courses with Continuing Education Credit**

Contact Technical Support if you are interested in customized surveys and continuing education certificates if your organization is accredited to offer online courses for credit.

### **Additional careLearning Course Production Services**

Standard private courses are unlimited and at no additional charge. If you have special instructional design needs, careLearning offers course production services at an hourly rate of \$100 per hour, which is billable in half-hour increments.

## 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 3<sup>rd</sup> 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. Popular authoring tools include Articulate Presenter, Articulate Storyline, iSpring Suite, Adobe Captivate, SmartBuilder, etc.

Here are some facts to consider when deciding between SCORM compatible course software:

- The courses will work on most of the LMSs in existence today therefore offering greater opportunity for portability.
- If you purchase a third-party authoring tool, 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 Technical Support.

### **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 3<sup>rd</sup> Party Content Providers

If your organization wishes to obtain courses from a 3<sup>rd</sup> Party Content Provider and place them on the *careLearning* Learning Management System (LMS) there are specific steps to follow to ensure a successful procedure.

1. **Contact** careLearning **before** you purchase courses from or sign a contract with the 3<sup>rd</sup> Party Content Provider. A Usage Agreement is required by your organization for each 3<sup>rd</sup> Party Content Provider. Access to a shared folder will be provided for placement of course files and spreadsheet (see below).
  - Please Note: We have had great success working with many 3<sup>rd</sup> Party Content Providers. However, we have encountered some that claim that their course will work on “any” LMS, only to find that is not the case. There are many variables when working with 3<sup>rd</sup> Party Content Providers that we can help you navigate. We are happy to assist you prior to signing any contracts.
2. **Obtain** the SCORM 1.2 or AICC compliant course zipped files from the 3<sup>rd</sup> Party Content Provider.
3. **List** the 3<sup>rd</sup> Party Content Provider file names with the course titles as you wish for them to appear in the student classroom in a spreadsheet that includes the headers “File Name” and “Course Title”. (Course titles cannot exceed 50 characters (this includes spaces).)

Example:

	A	B
1	File Name	Course Title
2	AI-000	Privacy Standards
3	2062091	Workplace Safety
4	RN01	RN Code of Ethics
5		

4. **Place** the course files and spreadsheet in the shared folder provided by careLearning.
5. Your **organization** will be invoiced a one-time, non-refundable \$500 integration fee\*\* **per** 3<sup>rd</sup> Party Content Provider which covers the work that goes into the set-up process. The fee is per 3<sup>rd</sup> Party Content Provider, not per course, which means there is no additional cost to load other courses from the same 3<sup>rd</sup> Party Content Provider. \*\*Courses secured during the

organization's LMS implementation and courses procured from RQI Partners (HeartCode, RQI, NRP) are excluded from the integration fee.

6. **careLearning** will install one course per 3<sup>rd</sup> Party Content Provider to the LMS and provide the organization with an account to test the course and become familiar with its content/functionality.
7. The **organization** will complete testing in the internet browser most commonly used by the organization and **notify** careLearning of any issues/concerns. We are happy to assist you in troubleshooting any issues/concerns, however, **the course is ultimately the responsibility of the 3<sup>rd</sup> Party Content Provider. Failure to comply with these steps could result in the courses not functioning properly on our LMS. careLearning is not responsible for any costs incurred if you have failed to follow this policy.**

- **Testing Directions:**

1. Click Go to the right of the course title to enter the course:
  - Does the course launch/open successfully?
2. Move through the course **but** do not complete it. Exit the course:
  - The course should not mark as complete (there should be no green checkmark to the left of the course title)
3. Re-enter the course:
  - Does the course allow you to resume where you left off?
4. If the course has a post-test, fail the test. Exit the course:
  - The course should not mark as complete (there should be no green checkmark to the left of the course title)
5. Re-enter the course.
  - Are you able to take the test again?
6. If the course has a post-test, pass the test. Exit the course:
  - The course should mark as complete and there should be a green checkmark to the left of the course title.
7. If the course does not have a post-test, the course should mark as complete (with a green checkmark to the left of the course title) **only** when all lessons have been completed.
8. From the student classroom, click Student Transcripts:
  - Is the completion date correct?
  - Is the grade correct?
  - Is the status correct?

8. **Notify** careLearning when testing is complete.
9. careLearning will perform the following tasks within one business week of being notified that testing has been completed and there were no issues/concerns.
  - Change the IDs of the course files to match LMS required IDs.
  - Install the remainder of the courses and set up sessions on the LMS.
    - a) Since the number of licenses is determined by the organization's contract with the 3<sup>rd</sup> Party Content Provider, careLearning will set it as the same number of seats purchased for the LMS subscription.
    - b) Session length (session end date) will not be set. Your organization will have access to the courses for as long as you continue the contract with the 3<sup>rd</sup> Party Content Provider.
  - Provide instructions to the organization for adding the courses to the Administrative Management System (AMS).
10. The organization will deregister assigned individuals from the course(s) at least once a year. The organization can address this at time of the annual renewal of the careLearning subscription or on their own.
11. The organization will inform careLearning when updated/revised course(s) have been received from the 3<sup>rd</sup> Party Content Provider.
12. The organization will inform careLearning when the course(s) can be retired from the LMS.



## 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".
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.

Examples of each of the ways curriculum can be assigned and worksheets to guide you while creating your own curriculum follows.

### Offline and Online Curriculum

The Online and Offline Curriculum feature allows you to build curriculum in advance of when you want to release the courses in that curriculum to your employees.

**Online** is considered "live". This means that 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”. This allows 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 which 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. If your organization does not treat new employees differently in terms of their online classroom, then most of what is said in this section may not apply to you.

Some organizations exempt their new employees from getting any online courses their first year because they prefer them to go through live orientation only. If this 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, which prevents them from receiving a classroom until the exemption period ends. However, the new employees are still added to your AMS so they can be tracked in Events and TrackIt.

When it comes to special curriculum settings for new employees, there are two types of rules you can create that tell the system how to handle your new employees:

1. an Exemption rule
  - The Exemption rule allows you to exempt new employees from taking some of the courses an existing employee would take for a set period of time.
2. an Orientation Course Assignment rule

- The Orientation rule is exactly the opposite. It allows you to provide a specific set of courses only to new employees. Courses used in an orientation curriculum cannot be used in any other curriculum.

The following examples show how each of these rules can be applied independently and in conjunction with one another.

Imagine the following conversation taking place between four administrators of *careLearning* that come from different hospitals:

**George:** “My organization has new employees take the same courses as existing students therefore we do not have any special rules in place.”

**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 employees 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 them online to automatically tracked their completion 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.”

*careLearning* strives to accommodate many types of preferences when it comes to how education is handled. If your organization still has additional requirements to consider, please contact your Technical Support representative.

## **Successfully Planning Curriculum**

The challenge with Curriculum is having a good plan for what you want to accomplish at your organization. Your curricula can be simple and straightforward or very complex. The simpler you make it though, the easier it will be to explain it to others in your organization. Making the curriculum settings in the system is actually the easiest part of the process.

Here are some tips for successfully planning your curriculum:

- **Work from your largest groups to your smallest.**

- Find all the greatest things that are held in common first. In other words, decide what courses are to be offered to every employee and use this as your first curriculum. Title it something like “Mandatory Education”.
- **If it can be consolidated it should be.**
  - Try to make sure you are not creating too many special curricula in hopes of saving a few employees from taking a particular course. This usually results in having so many curricula that it begins making it difficult for the administrator to identify and explain any curriculum related problems.
- **If you are creating rules that are special to new employees you may have to divide curriculum to accommodate the exemption rule.**
  - For example, if your “Mandatory Education” curriculum has the following courses in it: Fire Safety, Electrical Safety, Disaster Preparedness, and Hazard Communication. If new employees get everything except Hazard Communication, 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 following worksheets to help organize your thoughts before making your curriculum settings. careLearning Technical Support will provide training on how to make the settings in the system. We are also happy to look over your worksheets prior to you setting up your curriculum. Technical Support is available and can provide helpful suggestions on simplifying this process.

## Completing the Curriculum Worksheets

The next section will show you some example curriculum. If you have questions as you create your curriculum, please contact careLearning Technical Support at 866-617-3904 or email [support@carelearning.com](mailto:support@carelearning.com).

Here are some things to note about the examples provided:

- You can assign curriculum based upon:
  - Departments
  - Job codes
  - Groups
  - Any combination of the three
- Any curriculum overlap will be automatically handled by the AMS.
  - No one will have duplicate courses assigned to their classroom
- Based on the size of your organization, you may have a long list of departments/job codes/groups to list out on the curriculum worksheets
  - Instead of using department and/or job code ID numbers, you may use the actual names or titles of the department and/or job code
- Using job codes is optional. If you do not use job codes, you will **only** be able to use departments in your curriculum. Although job codes are not required, we highly recommend you supply job codes if you have them for future use
- Assigning curriculum by departments only means **all** employees in that department will get that curriculum
- Groups allows you to go further than just departments and job codes. For example, a group curriculum could be:
  - **RN / LPN Curriculum**  
Job Code: 120 “but only in” Departments: 100, 125, 150  
  
Job Code: 130 “but only in” Departments: 100, 125, 150
- For an employee to receive all their required courses, they may end up being assigned to multiple curriculum
- If you answer yes to the question “Do new employees get these courses?” remember new employees will only receive the course **if** their department, job code, or group dictates it. It does not mean ALL new employees will receive the courses.

EXAMPLES ONLY – Your curriculum should be based upon your organization’s needs and population served.

**Example of Curriculum by Department**

<b><i>Curriculum Name</i></b>	<b><i>Who qualifies?</i></b>	<b><i>What courses?</i></b>
Mandatory Education	All departments	<ol style="list-style-type: none"> <li>1. Fire Safety</li> <li>2. Electrical Safety</li> <li>3. Hazard Communication</li> <li>4. Disaster Preparedness</li> <li>5. Moving, Lifting and Repetitive Motion</li> <li>6. Patients’ Rights</li> <li>7. Slips, Trips and Falls</li> <li>8. Abuse and Neglect</li> <li>9. Medical Radiation Safety</li> <li>10. Hand Hygiene</li> </ol>

**Example of Curriculum by Job Code**

<b><i>Curriculum Name</i></b>	<b><i>Who qualifies?</i></b>	<b><i>What courses?</i></b>
Clinical Employees	Job Codes: 500 RN 501 LPN 709 Respiratory Therapist 710 Physical Therapist	<ol style="list-style-type: none"> <li>1. Bloodborne Pathogens</li> <li>2. TB Prevention</li> <li>3. Isolation and Standard Precautions</li> <li>4. Restraints</li> <li>5. Population Specific Care – Adult</li> <li>6. Population Specific Care - Pediatrics</li> </ol>
Non-Clinical Employees	Job Codes: 820 Coder 845 IT 900 Electrician 823 HR Generalist	<ol style="list-style-type: none"> <li>1. Infection Prevention and Control for Non-Clinical Employees</li> </ol>

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

<b><i>Curriculum Name</i></b>	<b><i>Who qualifies?</i></b>	<b><i>What courses?</i></b>
New Employee Online Orientation	All Departments, only employees hired <b>within</b> 365 days	<ol style="list-style-type: none"> <li>1. Time Card Procedures</li> <li>2. Dress Code Policy</li> </ol>

**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.

<b><i>Curriculum Name</i></b>	<b><i>Who qualifies?</i></b>	<b><i>What courses?</i></b>
Existing Employee Refreshers	All Departments, only employees hired <b>beyond</b> 365 days	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, TrackIt) and filtered reports. The Groups feature allows you to create as many new groups as you wish based either on employee names or a combination of departments and job codes. For example:

- Grouping employees who span multiple departments or job codes or both, such as 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 employees based on their actual names, such as a special task force set up within the organization. Job codes or departments have nothing to do with identifying this group of employees. The group is made by selecting the employees' 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.**



**Curriculum Worksheet**  
BASED ON JOB CODE

**Organization Name:**

**Curriculum Name:**

**Who gets these courses?**

- New employees only
- Existing employees only
- Both

**List the courses to be included in this curriculum:**

**List the Job Codes that will be assigned this curriculum**

**Job Code**

**Job Title**



**Curriculum Worksheet**  
**BASED ON GROUPS**

**Organization Name:**

**Curriculum Name:**

**Who gets these courses?**

- New employees only
- Existing employees only
- Both

**List the courses to be included in this curriculum:**

**List the Groups that will be assigned this curriculum:**

## What is a Group?

A Group is a collection of employees organized in the AMS to allow for quick assignment to activities (courses, live events, TrackIt) 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.

The most commonly used form of division within an organization is departments. Your departments were required when your organization's data was first loaded into the AMS. Though not required for setting up your AMS, job codes are highly recommended as another means for division of employees. If you find a need for divisions beyond departments and job codes, Groups are available. Group examples could include RNs, LPNs, East Campus, West Campus, Support Staff, etc.

## Why Should I Use a Group?

Reasons why it might be necessary to build a group:

- Quickly assign courses, events, and TrackIt items to a select number of employees
- Ease of reporting: Rather than selecting each department and running separate reports for each one, you can run reports by Group
- Identifying types of employees: For example, if clinical Administrative Assistants get different courses than non-clinical Administrative Assistants, you can select the Administrative Assistant job code and select all the clinical and/or non-clinical departments to form a group.
- Group employees based on their actual names rather than on rules based on job codes and/or departments. This is called a manual group and is discussed in the next section.

Groups can be time consuming to create, but their benefit comes over and over in the weeks, months, and years to come. You only have to do group set-up one time. Once a group has been created, items can be assigned by choosing to select the group rather than having to go back through and make all the selections from the departments and job codes again.

## 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. For example:

- In most organizations, typically RNs span multiple departments within the organization and may have different job codes. When creating an RN group, you can base group rules on departments, job codes, or both. Once the group is created, anytime you want to assign something or run reports on RNs, using the RN group bundles them together for you.

**Manual Groups** are created based on names of employees. No one becomes part of the group without you deliberately assigning them. For example:

- You want to assign and/or track items about a task force. You manually select the names of the employees on this task force to create the task force group. If someone new is added to the task force, you would manually add that employee to the task force group.

**New Hires** are a special type of **automatic** group. Once you define how many days an employee is considered a new hire, employees will be assigned to the group automatically with no further intervention from you. To use this group, you must have hire dates in your AMS. Setting up hire date is found under Setup/Preferences > System Setup Options. If you have any questions about hire dates, contact Technical Support.

**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 and reports can be run on it. However, it has the added feature of also maintaining the eRegistrar log-in permissions.

## **Example Automatic Groups**

Automatic groups allow you to create rules based on job codes, departments, or both. Once you set up the rules for an automatic group, the AMS will follow those rules when you add new employees and will automatically place those employees in the group for you. The examples below will help you understand the format of the group worksheets you will use to set up 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

1.36 Ob / Gyn

1.309 Newborn Nursery

Anyone with the following job codes:

2.44 RN

3.45 LPN

## **Manual Groups**

Manual groups are built based on specific employees. Manual groups 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. Employees will **not** be automatically placed in a manual group. Manual groups work very well when you have things like task forces, committees, or other specially designated groups.

### **Example of a Manual Group**

**Group Name: Emergency Codes Task Force**

**Who will be included in the group?**

Terry Schaffer

Mindy Sullivan

Janice Strapp

Michael Bermann

Peter Williams

**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.**





**AUTOMATIC GROUPS WORKSHEET**  
**BASED ON JOB CODE**

**Organization Name:**

**Group Name:**

**List the Job Codes to be included in this group:**

**Job Code**

**Job Title**



## AUTOMATIC GROUPS WORKSHEET BASED ON JOB CODE AND DEPARTMENT

**Organization Name:**

**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.*

<i>Exclude:</i>	<i>Name</i>	<i>Department</i>	<i>Job Code</i>

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## **Final Thoughts**

Creating curriculum tends to be underestimated. It can be very time-consuming. It is also possible to get carried away and create more curricula than are truly needed which creates other problems. Taking the time to create a grounded, well-thought-out plan will truly pay off, because once curriculum is completed, it requires little, if any, maintenance.

## **ID Badge Scanning**

Using the *careLearning* ID scanning feature allows you to scan employee ID badges 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 the scanners to be purchased directly from *careLearning*. You may contact Technical Support for current pricing. (If you already have scanners that can produce a .txt file then you may be able to use those with the AMS.) All three types of *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.

If you are interested in using a scanner, we ask you to 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 any purchase. While not common, we have seen some bar code badges that were proprietary and would not work with our scanners. 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.

The scanners will need an open com port and will access to the c:\ drive on the PCs with the AMS. Occasionally, devices like PDAs may already be occupying a com port or an organization may not allow c:\ drive read/write capabilities. It is your organization's I.T. staff who is responsible for providing you with an appropriately capable computer.

### **Scanning Options for Organizations that do not use ID Badges**

The AMS can produce paper rosters with bar codes next to the employees' names. This feature can be useful for organizations that do not use name badges or whose name badges do not have security encoded ID information on them. The bar-coded paper roster can be scanned and the information imported into the AMS just as would happen with badge scanning. Some *careLearning* organizations use the bar-coded 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 set up 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:

- 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 their courses?

- It may be that currently at your organization access to the Internet is very limited to senior management and maybe, some select managers and employees. With *careLearning*'s online classroom, all of your employees will need access to the Internet.

### Where will they do this from?

While different at every organization, there are two basic setups:

- One is employees gain access from a PC in their departments 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 streaming media and interactive technologies (Video, HTML5, etc.).

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 T1s are nice, you might be able to convince your ISP to give you a measured T3 for about the same price. If you are a smaller organization, a T1 would be great, but again, not required. In today's market.
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:

- PCs that will be used by all employees to access the Internet and their courses (Student PCs);
- 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 ‘HTML5’ to deliver content over the Internet. Consequently, you will need 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 IE 11 or the latest Edge/Chrome/Firefox

## 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](http://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, the **Administrative Management System (AMS)** is a split database application with:
  - the backend (server AMS) located on one of the organization's servers (discussed below)
  - the front end (desktop AMS) located on the end user's 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 **32-bit version of Access 2003, 2007, 2010, 2013, 2016**. 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
- Office 2013 – Service Pack 1
- Microsoft Windows 7 or later operating system (includes Windows 8 and 10) 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 computers

## 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 newer 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**

The *care*Learning tracking and reporting system is divided into two separate packages:

- The Learning Management System (**LMS**) is on the Internet and requires nothing more than the information discussed under the previous 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 2003 Server with Service Pack 2 or later, or Windows 7 or later operating system (includes Windows 8 and 10)
- 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. **NOTE: 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.

Many factors come into play when it comes to an application's performance. We can only recommend that if you have a choice of servers on which to place the Server AMS that you choose one of your newer, faster ones if possible. 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 (you may customize name if you wish), will allow your employees a single source interface for managing their education. Employees can login using their *careLearning* login and password to perform several 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 education transcript reports
- View deadlines, due dates, and more

Department managers also use this tool to get information about employee educational progress. Access rights for department managers are set by an AMS administrator at your facility.

The technical requirements needed to use this product are:

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.
  - a. The server will need a onetime installation of runtime libraries for Crystal Reports 2008 SP3 and AJAX Extensions. Both are provided by *careLearning* during the installation.
  - b. 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 which are provided by you will be imported into your Administrative Management System (AMS). Once imported, the AMS will perform many functions, including printing username and password Enrollment Notices letters for your employees.

**These files are needed to load your employees, departments and job codes:** Both the “department” and “job code” files are one time 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 file formats to use based on your internal systems or your own preference.

You can choose one of the following and must then follow the instructions for that format exactly. Choose between:

- “Tab Delimited” text file
- “Comma Delimited” text file
- “Excel Spreadsheet” file

Based on your choice, follow the file specifications to follow.

**Special Note: The 5<sup>th</sup>, 6<sup>th</sup>, 7<sup>th</sup>, and 8<sup>th</sup> 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.**
- **id\_badge is used for those organizations who will use the AMS to record attendance at in-services by scanning their employee ID Badges or AMS generated bar coded rosters.**
- **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 9<sup>th</sup> and 10<sup>th</sup> field can be included to import custom student IDs and passwords if you want to supply them rather than have the AMS generate them.**

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

Once you have picked the file format you wish to use, follow the directions as to what to do with these files given to you by *careLearning* Technical Support. Since your AMS administrators will need the enrollment file to keep the employee data up to date, we highly recommend you build a process in which your AMS administrators can either run the enrollment file on demand or have it scheduled to run automatically and save the enrollment file to a specific folder each time. This will allow your AMS administrator 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/Payroll database system, or manually in one of the following formats:

- Microsoft Excel file (.xls or .xlsx)
- Comma delimited file (.csv)
- 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. For example: Do not enter "N/A" in a header field you are not using.

### **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. (**Required**)
  - This does not have to be a Social Security number, just a unique numerical identifier for each employee.
- 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.xlsx" 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 IDs and department names 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:

<b>department_id</b>	<b>department</b>
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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 IDs 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 IDs and Job Code names. The order and name of the column labels (headers) in the first row of each of the columns **MUST** be exactly as follows:

<b>jobcode_id</b>	<b>description</b>
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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 IDs are an Alpha/numeric mix, put all the alpha job codes at the top portion of the file.