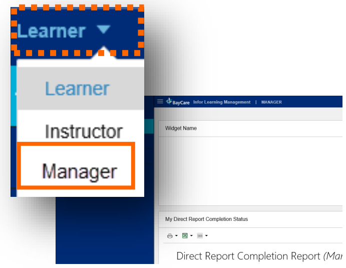
Manager Functions in the OLC

Follow the steps below using the ***Google Chrome*** web browser to perform the following team member tasks:

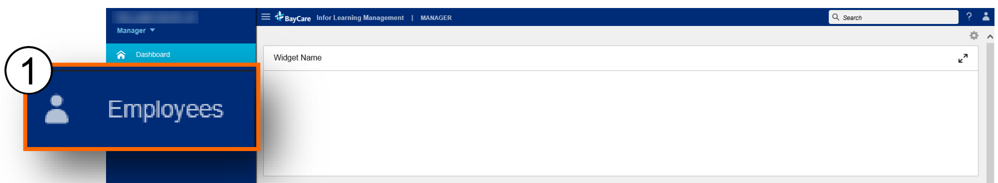
- Search For and View Team Members
- Complete Corporate Responsibility and DURS for New Hire
- View Team Member Transcript
- Run a Report
- Assign a Course to a Team Member



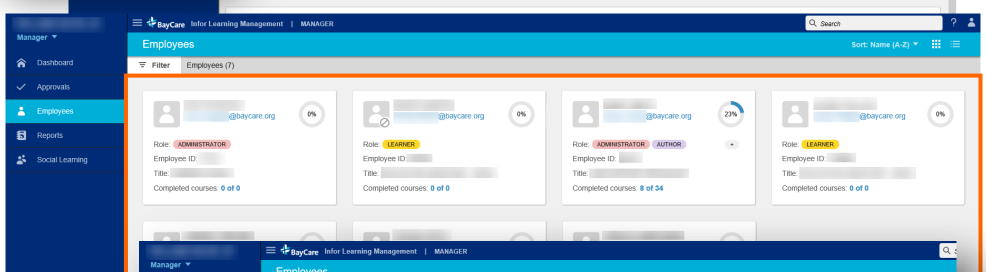
Note: Switch from *Learner* to *Manager* to complete any of the following sections.

Search For and View Team Members

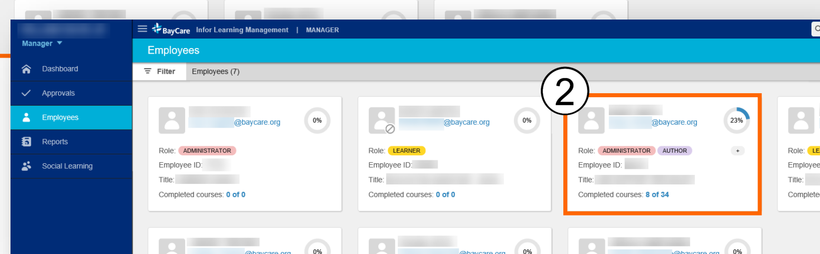
1. Click **Employees** from the menu.



Employee listings display on the right side of the screen.

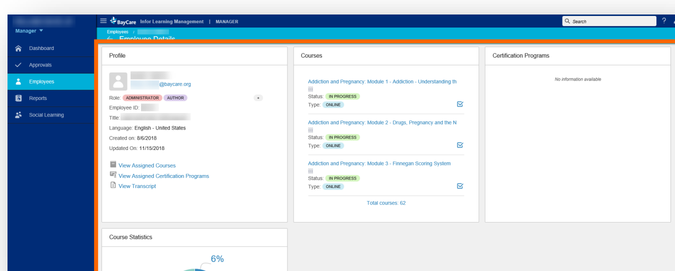


2. Click an employee name.



The following employee widgets display on the right side of the screen:

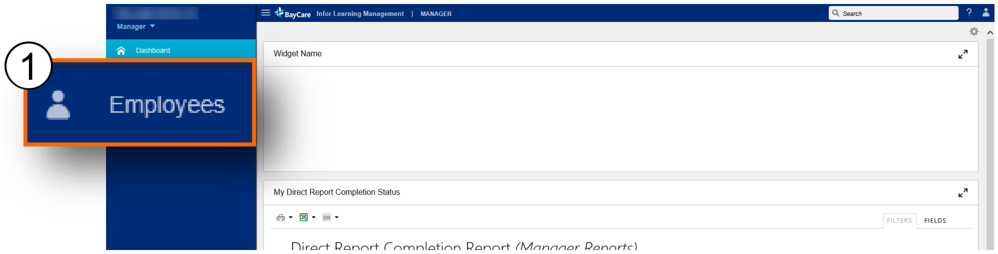
- Profile
- Courses (Enrolled)
- Certification Programs (Enrolled)
- Course Statistics



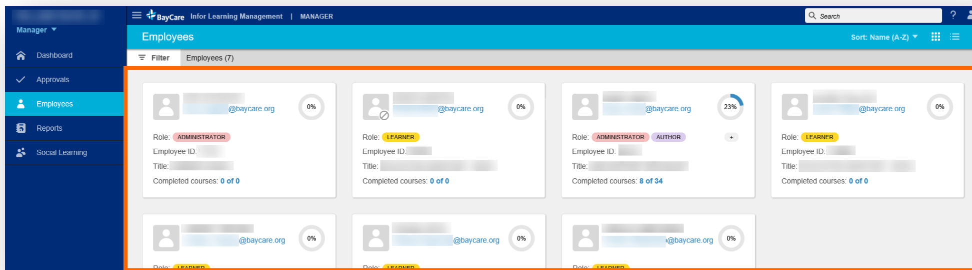
BayCare Information Services Education

Complete Corporate Responsibility and DURS for New Hire

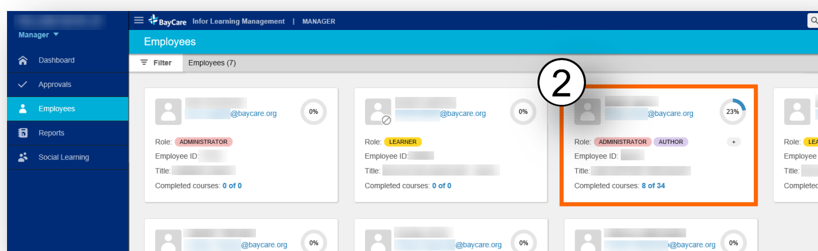
1. Click **Employees** from the menu.



Employee listings display on the right side of the screen.

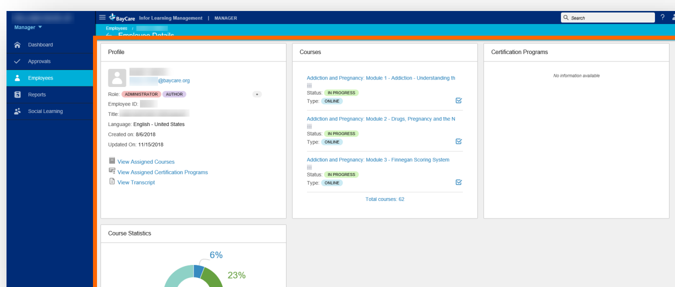


2. Click an employee name.

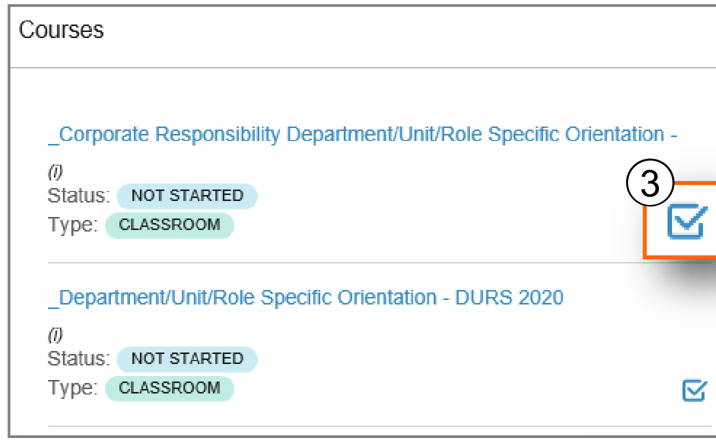


The following employee widgets display on the right side of the screen:

- Profile
- Courses (Enrolled)
- Certification Programs (Enrolled)
- Course Statistics

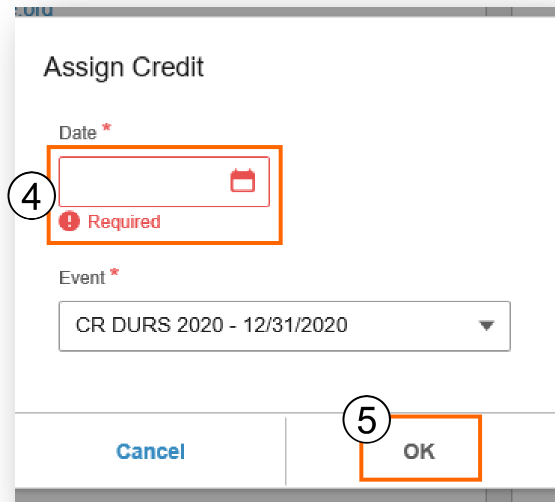


3. Click the checkbox to select the **_Corporate Responsibility Department/Unit/Role Specific Orientation - CR DURS** course in the *Courses* widget.



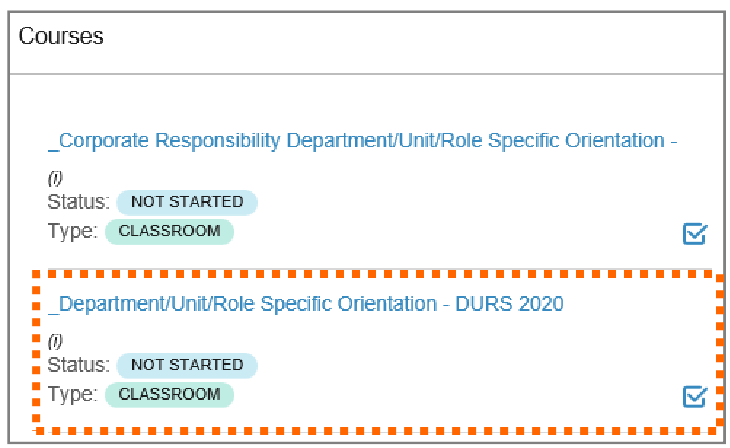
4. Click the calendar icon. Enter the Corporate Responsibility completion date.

5. Click **OK**.



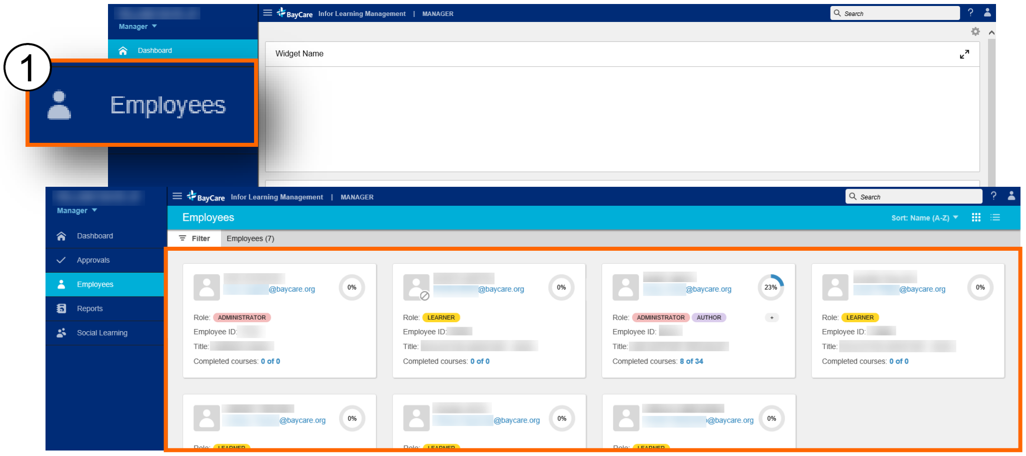
6. Repeat this process for the **_Department/Unit/Role Specific Orientation - DURS** course.

   Note: Managers are still required to place the DURS hard copy form in the team member's file, but all dates are tracked in the Learning Management System/OLC.



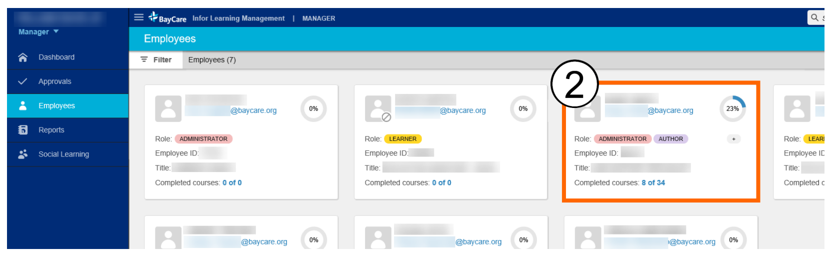
View Team Member Transcript

1. Click **Employees** from the menu.



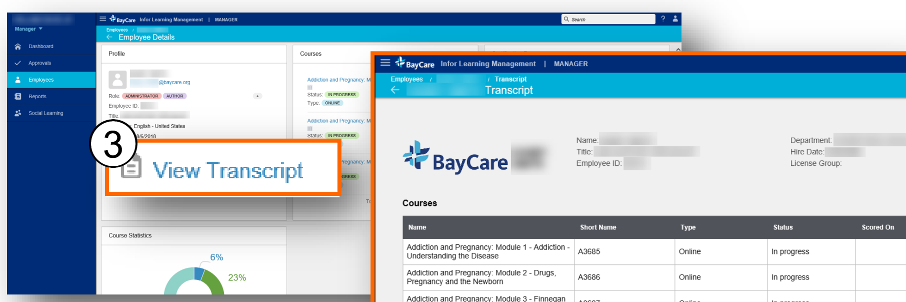
Employee listings display on the right side of the screen.

2. Click an **employee name**.



3. From the employee *Profile* widget, click **View Transcript**.

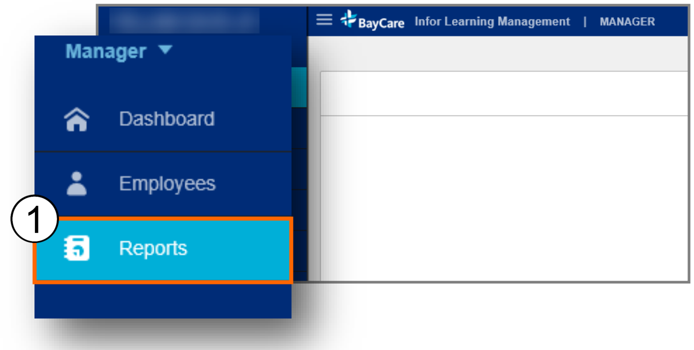
The employee transcript opens on the right side of the screen.



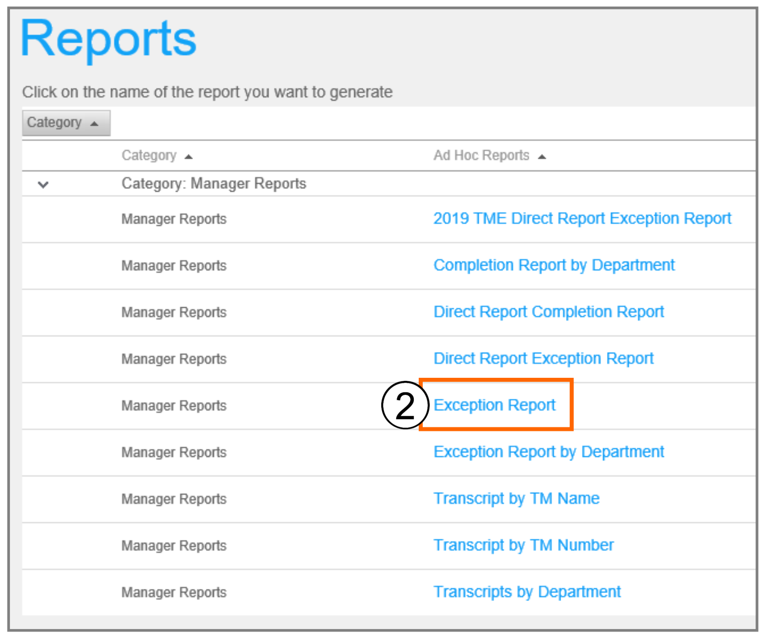
Run a Report

Click the suitcase icon in the upper left corner to change your login type from Learner to Manager.

1. Click **Reports** from the menu.



Report options display on the right side of the screen.



2. Click the **report name** you want to generate.

   In this example, click *Exception Report*.

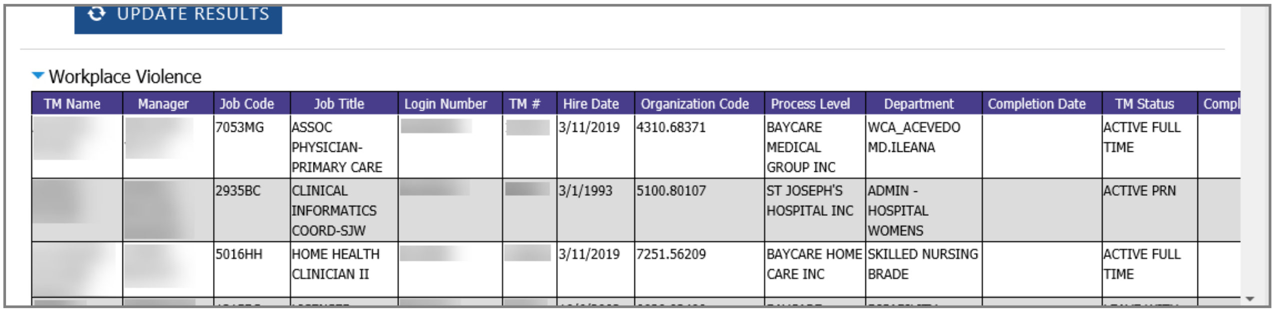
3. Select report criteria.

   In this example, select *course name*.

4. Click **Update Results**.

BayCare Information Services Education

The report preview displays.

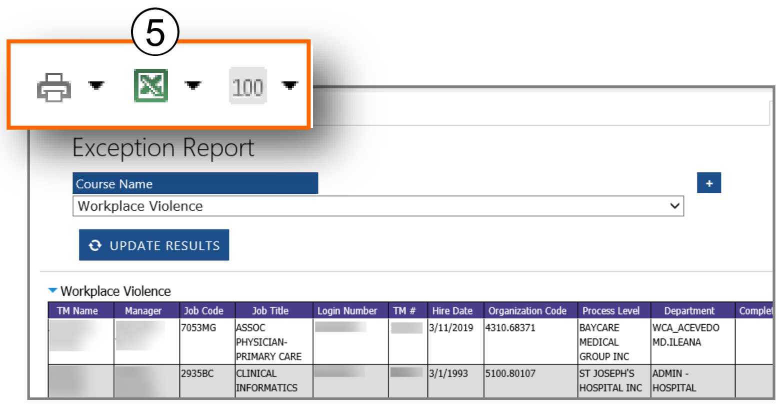


UPDATE RESULTS

Workplace Violence

TM Name	Manager	Job Code	Job Title	Login Number	TM #	Hire Date	Organization Code	Process Level	Department	Completion Date	TM Status	Compl
		7053MG	ASSOC PHYSICIAN-PRIMARY CARE			3/11/2019	4310.68371	BAYCARE MEDICAL GROUP INC	WCA_ACEVEDO MD.ILEANA		ACTIVE FULL TIME	
		2935BC	CLINICAL INFORMATICS COORD-SJW			3/1/1993	5100.80107	ST JOSEPH'S HOSPITAL INC	ADMIN - HOSPITAL WOMENS		ACTIVE PRN	
		5016HH	HOME HEALTH CLINICIAN II			3/11/2019	7251.56209	BAYCARE HOME CARE INC	SKILLED NURSING BRADE		ACTIVE FULL TIME	

5. Select one of the following:
   - Print the report
   - Export to Excel
   - Change the number of rows that display in the report preview

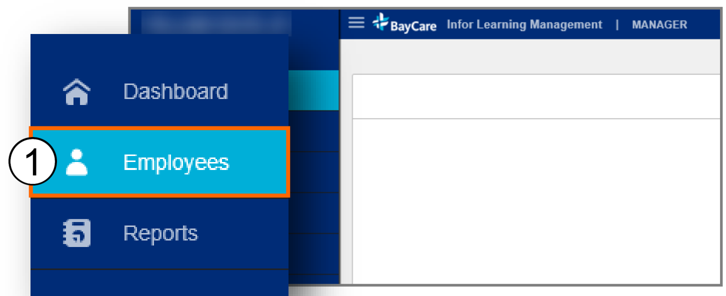


Note: Team member transcripts can also be viewed and printed.
- Transcripts are sorted by most recent completion.
- Sort order can be changed.

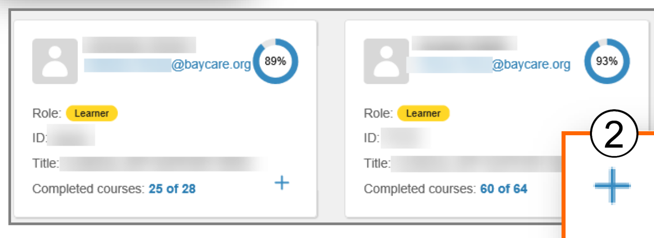
Assign a Course to a Team Member

- Managers are able to assign both online training and classroom courses for team members to attend.
- After registering a team member for a classroom course, inform him/her of the course date and time as the OLC does not currently send notification to registered team members.
- Once you assign a training, there is no way to cancel it (other than emailing *OLCAdmin*), so please be careful about what is being assigned to your team members and ensure you have the correct course name.
- Do not assign courses that have audiences assigned to them, as they refresh each night.
  Note: Your assignment that was pushed out to the team member will be removed unless the team member completes the course <u>the same day</u> you registered him/her for it.
- Courses already completed by the team member do not display in the search results as available to add.

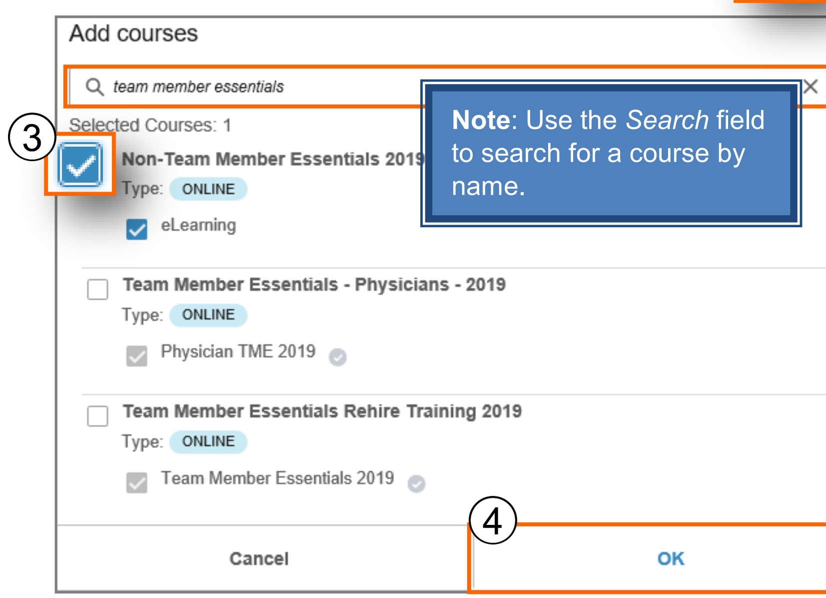
1. Click **Employees** from the menu.



2. On the box of the team member to assign training to, click the **+** button.



The *Add Courses* window displays.



3. Check the **box** next to the course name to assign.

4. Click the **OK** button.

   The course displays on the team member's dashboard to complete.

BayCare
Information Services Education