How to Run Reports

As an Admin or Manager you have the ability through the WLC to run reports. While admins can run reports for their entire agency, managers will only be able to run reports for users that reside within the groups they manage.

This handout will walk you through:

- Completion Overview
- User Transcript
- Completion Detail Report
- Course Grade Report
- Testing
- Individual Reports

Completion Overview - this report will show a high level overview of all assignments in your agency.

User Transcript - this report will show you the enrollments and completions for one specific user.

Completion Detail Report - this report will show you the enrollments and completion information for one specific course.

Course Grade Report - this report will show you the exam or test grade that a user achieved for a specific course.

Testing - this report will show results for tests that were built as a stand-alone test that is NOT built into a course (this report will rarely be used by our agencies and is not covered in this guide).

Individual Reports - this report will show results for tests that were built as a stand-alone test that is NOT built into a course (this report will rarely be used by our agencies and is not covered in this guide).

How to Run the Completion Overview Reports

- 1) Sign in to the WLC
- 2) Click Reports.
- 3) Select Completion Overview.
- 4) You'll be redirected to the *Completion Overview* page. Use the drop down fields to find the group, learning plan, or progress level you need.

A. To filter by a Group

- 1. Select the intended *Group* from the Group drop down to see a high level overview of courses users in the group have been assigned or enrolled in
- 2. There is a key indicating what the symbols by each learner represents
- 3. Click the user's name hyperlink to go to their profile
- 4. Click the icon under the course column to enroll or modify a due date for a learner.
- 5. Click *Export* icons at the top right to send this report to Excel for further review, sorting, or filtering.

B. To filter by a Learning Plan

- 1. Select the intended *Learning Plan* from the Learning Plan drop down to see a high level overview of learning plan courses users have been assigned or enrolled in
- 2. There is a key indicating what the symbols by each learner represents
- 3. Click the user's name hyperlink to go to their profile
- 4. Click the icon under the course column to enroll or modify a due date for a learner.
- 5. Click *Export* icons at the top right to send this report to Excel for further review, sorting, or filtering.

C. To filter by Course Progress

- 1. Select the progress level you wish to review from the Course Progress drop down
- 2. There is a key indicating what the symbols by each learner represents
- 3. Click the user's name hyperlink to go to their profile
- 4. Click the icon under the course column to enroll or modify a due date for a learner.
- 5. Click *Export* icons at the top right to send this report to Excel for further review, sorting, or filtering.



Many CHEX+ legacy clients have asked about exporting and manipulating report results from the WLC. The majority of WLC clients DO NOT export their report results from the site. They instead review the results in their web browser. If a surveyor is on site, they open the WLC and show the surveyor the results directly within the site.

📥 WellSky	E C Free Resources Course Updates & Info Directory of Credential Holders Self-Help & User Guides WellSky Learning Center Store	Elizabeth MacLeodYou are logged in as Jerry Seinfeld 🤍
🌮 Dashboard	Jerry Seinfeld	Customize this page
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p≢ My courses >	User Transcript Completion Detail Report Course Grade Report Testing Individual Reports NO courses	I <u>h</u> Course name * HH List *
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https://learning.wellsky.com/my/#		

2) Select Completion Overview.

WellSky =	Tree Resources Course Updates & Info Directory of Credential Holders Self-Help & User Guides WellSky Learning Center Store	Elizabeth MacLeodYou are logged in as Jerry Seinfeld 🔍
 	Jerry Seinfeld	Customize this page
Site home Calendar Calendar Private files My courses	Welcome, Jerry. This is your Dashboard. Start here to view your courses, see your clinicians' completion reports, or get started enrolling users. My Courses My Certificates Reports Completion Overview User Transcript Completion Detail Report Course Grade Report Cou	Add A Course
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3) You'll be redirected to the *Completion Overview* page. Use the drop down fields to find the group, learning, or progress level you're looking for.

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		Select filter(s) to view report				
		Contact Us	WellSky Learning Center		Wellsky Services	
		11300 Switzer Road, Overland Park, KS 66210	The WellSky Learning Center is the with the resources, targeted training,	best way to provide your team and certifications they need to	Services Overview Advisory Services	
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4) The key indicates what the icons next to each user represent.

WellSky =	C Free Resources Course Updates & Info Directory of Credential Holders Self-Help & User Guides WellSky Learn	ing Center Store Elizabeth MacLeodYou are logged in as Jerry Seinfeld 💦
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	L Morty Seinfeld 0	
	L Christopher Soprano	
	Contact Us WellSky Learning Center	Wellsky Services

WLC Handout for Client Admins

To extend a learner's due date, click the Assigned, Unsuccessful, Due in or Overdue icon.

WellSky = 🗆	Free Resources Course Updates & Info Direct	ory of Credential Holders Self-Help & User Guides WellSky Learning Center Store	Elizabeth MacLeodYou are logged in as Jerry Seinfeld 🦳
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	Contact Us	WellSky Learning Center Wellsky Services	

If a learner's enrollment is Overdue, you will click Renew before setting a new due date

KellSky	≡ 53 Fre	e Resources	Course Updat	es & Info Directory of Cre	dential Holder	's Self-Help & User Guides WellSky	y Learning Center Store	E	Elizabeth MacLeodYou are logged in a	is Jerry Seinfeld 🔼		
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B		i E-mail: learning	g@wellsky.com		SU	ucceed.		Outsourced Services				

To extend an upcoming due date select a new un-enrollment date before clicking *Save*.

WellSky 🔹	E C Free Resources Course Updates & Info Directory of Credential Holders	Self-Help & User Guides
🖚 Dashboard	Advanced Directives: Home Health Agency and Clinician Responsibilities	25 minutes Nursing Learn more
	Expiration Date: 01/01/2050 00:00 Number of available seats: Unlimited	
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To enroll a user that is listed as Not Assigned click the icon before clicking Enroll on the following screen



**Double-check that you are enrolling them in the correct course by looking at the course title listed at the top of the column.

How to Run the User Transcript Report

- 1) Sign in to the WLC
- 2) Click Reports.
- 3) Select User Transcript.
- 4) You'll be redirected to the *User Transcript* report page. Use the drop down fields to find the group or user you need.

WellSky = :	Free Resources Course Updates & Info	Directory of Credential Holders Self-Help & User Guides WellSky Learning Center Store	Elizabeth MacLeodYou are logged in as Jerry Seinfeld 🔍
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2) Select User Transcript

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A Site home	Welcome, Jerry. This is your Dashboard. Start here to view your courses, see your clinicians' completion reports, or get started enrolling users. My Courses My Certificates Reports -	Add A Course
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4) Select the User from the drop down menu.

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	Home Health Basic Training Series - Guardrails for Your Work-Day	-	0.75		-	-	-	- Not Started	Past Due	01/11/2024	Not Started	-	Required	

Use the date range or search filters to narrow your results. You can export this to Excel through the icons at the bottom

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	Contact Us					WellSky L	earning Cent	er		Wellsky	Services				
	11300 Switzer Road, (overland Park,	KS 66210			The WellSky	Learning Center	is the <i>best</i> way to	provide your team	Services	Overview			~	
Sec. 2014 Phone: 844-993-2994							with the resources, targeted training, and certifications they need to succeed.					Advisory Services Outsourced Services			
_	🖂 E-mail: learning@w	ellsky.com													

How to Run the Completion Detail Report

- 1) Sign in to the WLC
- 2) Click *Reports*.
- 3) Select Completion Detail Report.
- 4) You'll be redirected to the *Completion Detail Report page*. Use the drop down fields to find the course category, course, or group you need.

WellSky =	Tree Resources Course Updates & Info Directory of Credential Holders Self-Help & User Guides WellSky Learning Center Store	Elizabeth MacLeodYou are logged in as Jerry Seinfeld 🦳
Dashboard	Jerry Seinfeld	Customize this page
Site home	Welcome, Jerry. This is your Dashboard. Start here to viv your clinicians' completion reports, or get started enrolling users.	
🛗 Calendar	My Courses My Certificates Reports -	Add A Course
D Private files ■ My courses →	Course overview User Transcript Completion Detail Report Course Grade Report Testing Individual Reports No courses	I≟ Course name ▼
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https://learning.welisky.com/my/#		

2) Select Completion Detail Report

WellSky =	🕻 Free Resources Course Updates & Info Directory of Credential Holders Self-Help & User Guides WellSky Learning Center Store	Elizabeth MacLeodYou are logged in as Jerry Seinfeld 风
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3) You'll be redirected to the *Completion Detail Report* page. Use the drop down fields to find the course category, course, or group you need.

✓ WellSky =	Free Resources Course Update	es & Info D	Directory of Credential Holders Self-	elp & User Guides WellSky Learning Cen	er Store Elizabeth MacLeodYou are logged in as Jerry Seinfeld 🤍
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If a user's name is highlighted in BLUE as shown below, it indicates that the user is enrolled in the course. **Please note this is different that revious reports where the check mark indicated enrollment.

📥 WellSky	≡ [] Fre	ee Resources Course Upda	ates & In	fo Dir	ectory of Credential Holders Self-Help & User Guides WellSky Learning Center Store	Elizabeth MacLeodYou are logged in as Jerry Seinfeld
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		1 Janet Dow	~	~ ~		
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		L Unknown Newman	~	~ ~		

How to Run the Course Grade Report

- 1) Sign in to the WLC
- 2) Click Reports.
- 3) Select Course Grade Report.
- 4) You'll be redirected to the *Course Grade Report page*. Use the drop down fields to find the course, group, or attempt you need.

WellSky = 🗆	Free Resources Course Updates & Info	Directory of Credential Holders Self-Help & User Guides WellSky Learning Center Store	Elizabeth MacLeodYou are logged in as Jerry Seinfeld 🤍
Dashboard Earolimant	Jerry Seinfeld		Customize this page
Site home	Welcome, Jerry. This is your Dashboan My Courses My Certificates	L Start here to vir your clinicians' completion reports, or get started enrolling users.	Add A Course
 Private files Private files My courses 	Course overview T Past *	Completion Overview User Transcript Completion Detail Report Course Grade Report Testing Individual Reports No courses	I <u>k</u> Course name ▼
	Recently accessed courses	No recent courses	
https://learning.wellsky.com/my/#			

2) Select Course Grade Report

KellSky = 🗆	Free Resources Course Updates & Info	Directory of Credential Holders Self-Help & User Guides WellSky Learning Center Store	Elizabeth MacLeodYou are logged in as Jerry Seinfeld 🤍
🚓 Dashboard	Jerry Seinfeld		Customize this page
Enrollment	Welcome, Jerry. This is your Dashboard	. Start here to view your courses, see your clinicians' completion reports, or get started enrolling users.	
🛗 Calendar	My Courses My Certificates	Reports -	Add A Course
Private files	Course overview	User Transcript Completion Detail Report Course Grade Report Testing Individual Reports No courses	I <u>L</u> Course name • III List •
	Recently accessed courses	No recent courses	
https://learning.wellsky.com/my/#			

3) You'll be redirected to the *Course Grade Report* page. Use the drop down fields to find the course, group, or attempt you need.

k WellSky	≡ 🖸 Free Resources	Course Updates & Info	Directory of Credential Holders	Self-Help & User Guides	WellSky Learning Center	Store Elizabeth MacLeodYou are logged in as Jerry Seinfeld 🔼
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If a user's name is highlighted in BLUE as shown below, it indicates that the user is enrolled in the course. **Please note this is different that revious reports where the check mark indicated enrollment.

📥 WellSky	≡ []	Free Resources Course Upo	iates & Info	Directory of Credential Holders Self-Help 8	user Guides WellSky Le	earning Center Store	Elizabeth MacLeodYou are logged in as Jerry Seinfeld 🤼
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