

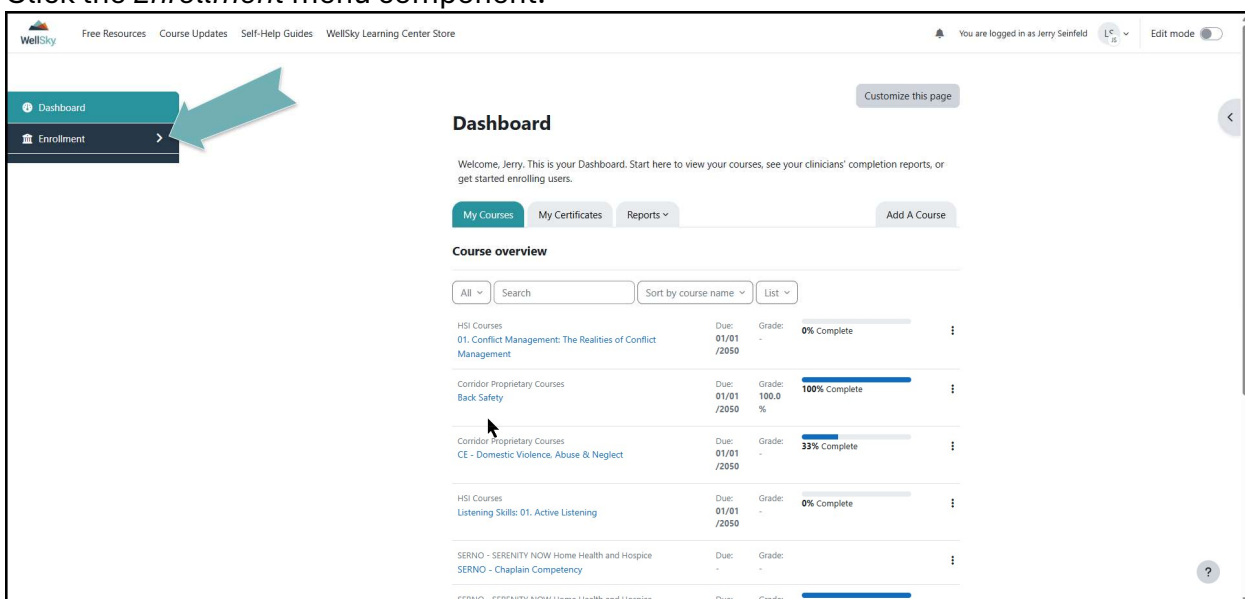
## ADD USERS TO ACCOUNT

This handout contains instructions on how to create, update, and suspend users on the WLC.

Use the bookmarks below to jump to a particular set of instructions:

- [Manually Create a User](#)
- [Upload Users](#)
  - [Preparing the File](#)
  - [Uploading the File](#)
- [Edit a User](#)
- [Suspend a User](#)
- [Activate Suspended User](#)

1. Click the *Enrollment* menu component.

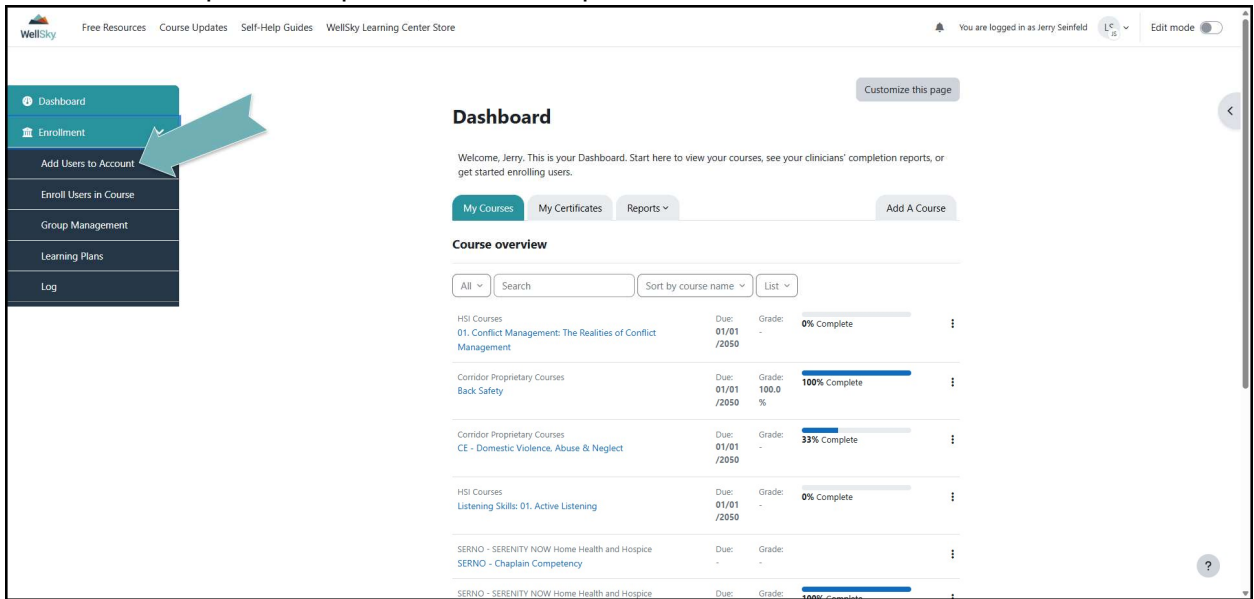


The screenshot shows the WellSky dashboard interface. The top navigation bar includes links for Free Resources, Course Updates, Self-Help Guides, and WellSky Learning Center Store. The user is logged in as Jerry Seinfeld. The left sidebar menu has 'Dashboard' and 'Enrollment' options, with 'Enrollment' highlighted by a teal arrow. The main content area displays the 'Dashboard' with a welcome message and a 'Course overview' table. The table lists various courses with their completion percentages and due dates.

Course Name	Due Date	Grade	Completion Status
HSI Courses 01 - Conflict Management: The Realities of Conflict Management	01/01/2050	-	0% Complete
Corridor Proprietary Courses Back Safety	01/01/2050	100.0 %	100% Complete
Corridor Proprietary Courses CE - Domestic Violence, Abuse & Neglect	01/01/2050	-	33% Complete
HSI Courses Listening Skills 01, Active Listening	01/01/2050	-	0% Complete
SERNO - SERENITY NOW Home Health and Hospice SERNO - Chaplain Competency	-	-	-
SERNO - SERENITY NOW Home Health and Hospice	-	-	100% Complete

## ADD USERS TO ACCOUNT

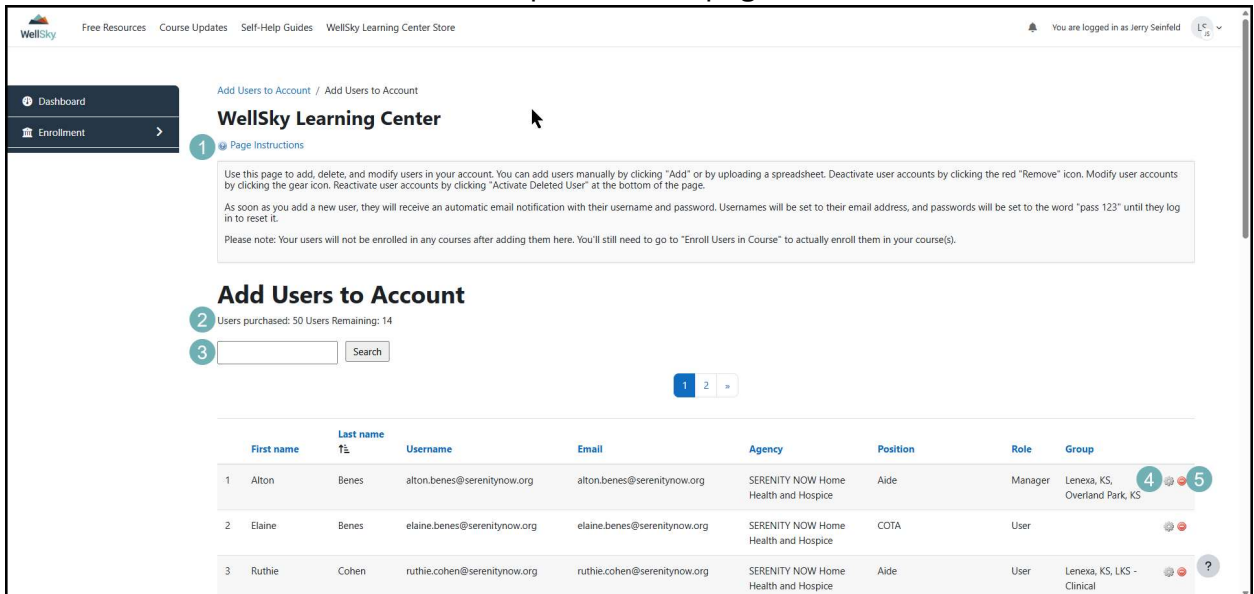
2. Once this component expands, click the option to *Add Users to Account*.



The screenshot shows the WellsSky dashboard interface. On the left, a sidebar menu is expanded, with 'Add Users to Account' highlighted by a teal arrow. The main content area displays the 'Dashboard' with a welcome message and a 'Course overview' section. The course overview table lists several courses with their completion percentages.

Course Name	Due Date	Grade	Completion %
HSI Courses 01 - Conflict Management: The Realities of Conflict Management	01/01 /2050	-	0% Complete
Corridor Proprietary Courses Back Safety	01/01 /2050	100.0 %	100% Complete
Corridor Proprietary Courses CE - Domestic Violence, Abuse & Neglect	01/01 /2050	-	33% Complete
HSI Courses Listening Skills 01: Active Listening	01/01 /2050	-	0% Complete
SERNO - SERENITY NOW Home Health and Hospice SERNO - Chaplain Competency	-	-	-
SERNO - SERENITY NOW Home Health and Hospice	-	-	100% Complete

3. Let's first learn what the links on the top half of this page do.



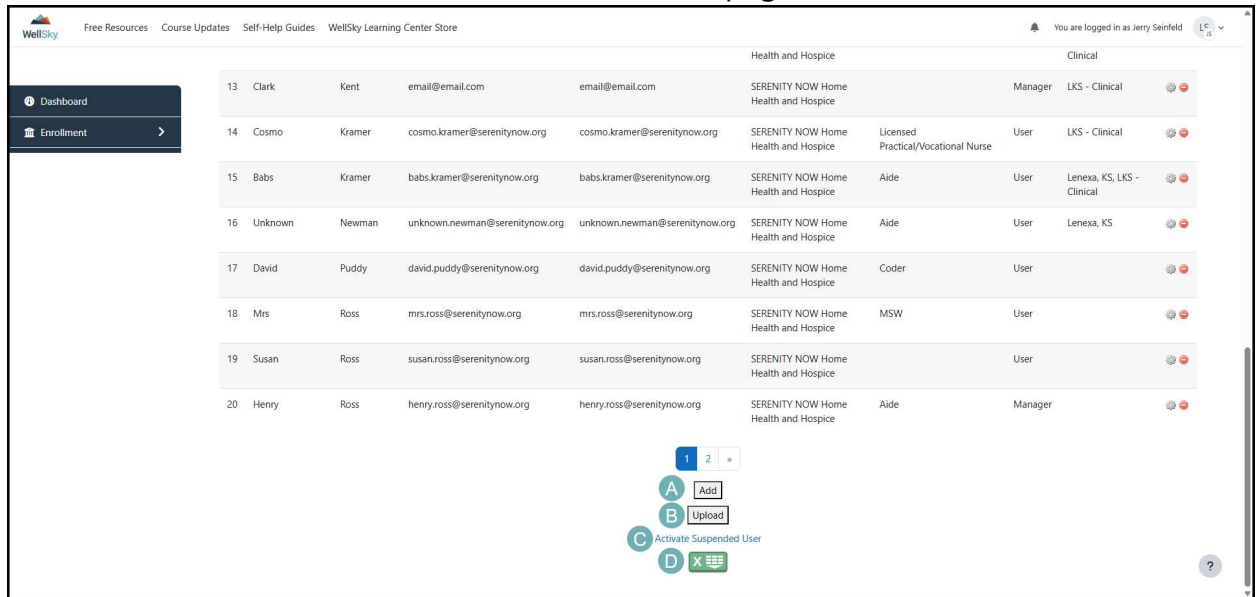
The screenshot shows the 'Add Users to Account' page. It includes a 'Page Instructions' section, a 'Users purchased' section, a search field, and a table of existing users. The table has columns for First name, Last name, Username, Email, Agency, Position, Role, and Group. The first user listed is Alton Benes, a Manager at SERENITY NOW Home Health and Hospice.

	First name	Last name	Username	Email	Agency	Position	Role	Group
1	Alton	Benes	alton.benes@serenitynow.org	alton.benes@serenitynow.org	SERENITY NOW Home Health and Hospice	Aide	Manager	Lenexa, KS, Overland Park, KS
2	Elaine	Benes	elaine.benes@serenitynow.org	elaine.benes@serenitynow.org	SERENITY NOW Home Health and Hospice	COTA	User	
3	Ruthie	Cohen	ruthie.cohen@serenitynow.org	ruthie.cohen@serenitynow.org	SERENITY NOW Home Health and Hospice	Aide	User	Lenexa, KS, LKS - Clinical

- A. **Page Instructions** – expand this section to read more about what you can do on this page. This section also includes the temporary password that's assigned to all users at account creation.
- B. **Users purchased** – this section shows you how many seats you have access to and the number that have yet to be filled.
- C. **Search** – use this field to search for a user by their first name, last name, or email address.
- D. **Gear Icon** – this icon gives you the ability to edit a user's account.
- E. **Suspend Icon** – use this button to suspend a user. All this does is remove the user's access to the WLC. The user's account and history remain intact and can be reactivated if needed.

## ADD USERS TO ACCOUNT

### 4. Now let's discuss the links on the bottom half of this page.



The screenshot shows the WellSky user management interface. At the top, there are navigation links: Free Resources, Course Updates, Self-Help Guides, and WellSky Learning Center Store. The user is logged in as Jerry Seinfeld. The main content area displays a table of users with columns for ID, Name, Last Name, Email, Username, Organization, Role, Location, and Action. Below the table, there are four action buttons: A Add, B Upload, C Activate Suspended User, and D Excel.

ID	Name	Last Name	Email	Username	Organization	Role	Location	Action	
13	Clark	Kent	email@email.com	email@email.com	SERENITY NOW Home Health and Hospice	Manager	LKS - Clinical	[Action]	
14	Cosmo	Kramer	cosmo.kramer@serenitynow.org	cosmo.kramer@serenitynow.org	SERENITY NOW Home Health and Hospice	Licensed Practical/Vocational Nurse	User	LKS - Clinical	[Action]
15	Babs	Kramer	babs.kramer@serenitynow.org	babs.kramer@serenitynow.org	SERENITY NOW Home Health and Hospice	Aide	User	Lenexa, KS, LKS - Clinical	[Action]
16	Unknown	Newman	unknown.newman@serenitynow.org	unknown.newman@serenitynow.org	SERENITY NOW Home Health and Hospice	Aide	User	Lenexa, KS	[Action]
17	David	Puddy	david.puddy@serenitynow.org	david.puddy@serenitynow.org	SERENITY NOW Home Health and Hospice	Coder	User		[Action]
18	Mrs	Ross	mrs.ross@serenitynow.org	mrs.ross@serenitynow.org	SERENITY NOW Home Health and Hospice	MSW	User		[Action]
19	Susan	Ross	susan.ross@serenitynow.org	susan.ross@serenitynow.org	SERENITY NOW Home Health and Hospice		User		[Action]
20	Henry	Ross	henry.ross@serenitynow.org	henry.ross@serenitynow.org	SERENITY NOW Home Health and Hospice	Aide	Manager		[Action]

- Add** – this button opens a data entry page where users can be created one account at a time.
- Upload** – this button opens a dialog box where CSV files can be uploaded to bulk create and update users.
- Activate Suspended User** – this link opens a list of all suspended users so they can be reactivated one user at a time.
- Excel** – this button will download a complete list of all your active users.

## Manually Create a User

1. Click the *Add* button.

The screenshot shows the WellSky user management interface. At the top, there are navigation links: Free Resources, Course Updates, Self-Help Guides, and WellSky Learning Center Store. The user is logged in as Jerry Sainfield. The main content area displays a table of users with columns for ID, Name, Email, Role, and other details. A green arrow points to the 'Add' button located below the table.

ID	Name	Email	Role	Other Info
13	Clark Kent	email@email.com	Manager	Health and Hospice, SERENITY NOW Home Health and Hospice, LKS - Clinical
14	Cosmo Kramer	cosmo.kramer@serenitynow.org	User	Health and Hospice, SERENITY NOW Home Health and Hospice, Licensed Practical/Vocational Nurse, LKS - Clinical
15	Babs Kramer	babs.kramer@serenitynow.org	User	Health and Hospice, SERENITY NOW Home Health and Hospice, Aide, Lenexa, KS, LKS - Clinical
16	Unknown Newman	unknown.newman@serenitynow.org	User	Health and Hospice, SERENITY NOW Home Health and Hospice, Aide, Lenexa, KS
17	David Puddy	david.puddy@serenitynow.org	User	Health and Hospice, SERENITY NOW Home Health and Hospice, Coder
18	Mrs Ross	mrs.ross@serenitynow.org	User	Health and Hospice, SERENITY NOW Home Health and Hospice, MSW
19	Susan Ross	susan.ross@serenitynow.org	User	Health and Hospice, SERENITY NOW Home Health and Hospice
20	Henry Ross	henry.ross@serenitynow.org	Manager	Health and Hospice, SERENITY NOW Home Health and Hospice, Aide

Buttons below the table: Add, Upload, Activate Suspended User.

## ADD USERS TO ACCOUNT

### 2. A data entry screen will open where you can input the user's information.

The screenshot shows the 'Add User' form in the WellsSky Learning Center. The form is titled 'WellsSky Learning Center User Information' and contains various input fields for user details. A sidebar on the left lists fields A through O. The main form area shows fields for Email address (A), Email (again) (B), First name (C), Last name (D), City/town (E), Country (F), User Type (G), Position (H), Date of Hire (I), Employee ID (J), Location (K), Department (L), Custom 1 (M), Custom 2 (N), and Group(s) membership (O). The Group(s) membership dropdown is open, showing options like Administrative Assistant, Clinical, Lenexa, KS, etc. At the bottom, there are 'Create account' and 'Cancel' buttons, and a 'Required' indicator.

- A. **Email address (REQUIRED)** – enter the user's email address using lowercase letters.
- B. **Email (again) (REQUIRED)** – enter the user's email address using lowercase letters.
- C. **First name (REQUIRED)** – enter the user's first name.
- D. **Last name (REQUIRED)** – enter the user's last name.
- E. **City/town (OPTIONAL)** – DO NOT USE THIS FIELD. It would be best to create a city/town group and assign users to that group.
- F. **Country (OPTIONAL)** – enter the user's country.

## ADD USERS TO ACCOUNT

- G. **User Type (REQUIRED)** – open the dropdown and select either Manager, Administrative Staff, User.
1. **Manager** – Managers can only manage the users within the groups they've been assigned. They can also be assigned Reporting and/or Account/Enrollment permissions. When you select Manager as the User Type for an account, the below section will need to be completed before saving the account:

**Management configuration**

Set as group manager

Administrative Assistant  
Clinical  
Clinical  
Lenexa, KS  
Lenexa, KS - Therapy  
LKS - Clinical  
LKS - PTs  
Non-Clinical  
Non-Clinical

Hold CTRL to select multiple

Reporting permissions

Account/Enrollment permissions

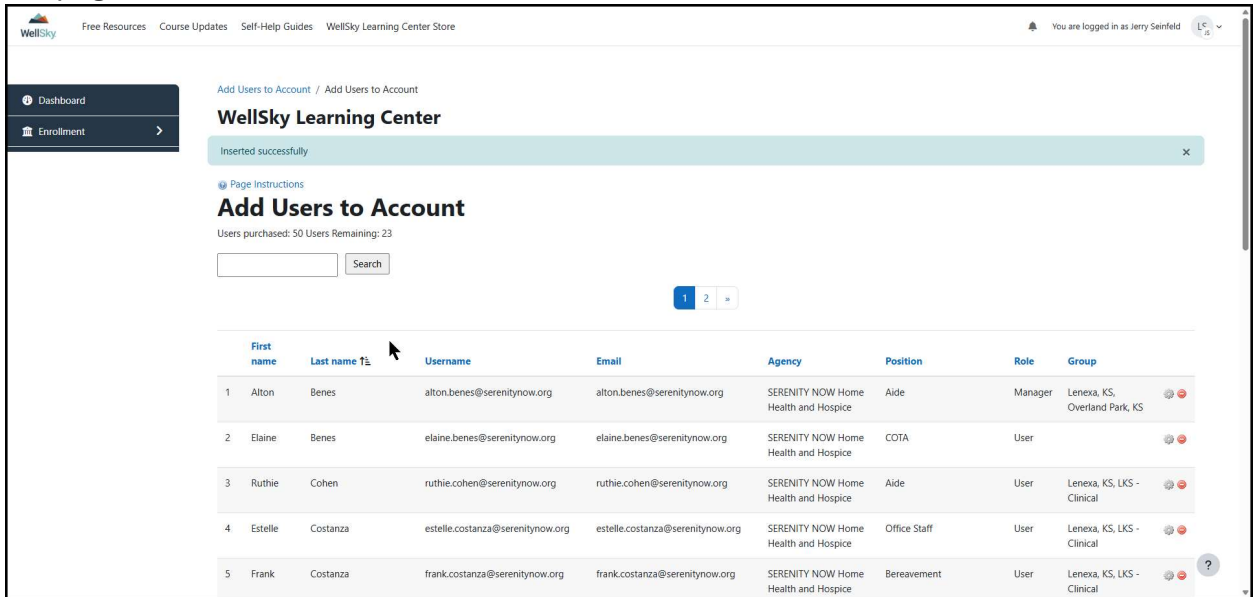
Create account Cancel

Required

2. **Administrative Staff** – Administrative Staff have access to all the same features as a Director. The only difference is that those with the Administrative Staff role cannot be assigned or complete courses.
  3. **User** – those with the User role can only complete courses and print their certificates.
  4. **Director** – The Director role is not shown on the dropdown menu, but it is available. To have this role assigned to a user, email [learning@wellsky.com](mailto:learning@wellsky.com) with this request.
- H. **Position (OPTIONAL)** – open the dropdown and select the correct job title.
- I. **Date of Hire (OPTIONAL)** – enter the user's hire date.
- J. **Employee ID (OPTIONAL)** – enter the employee's ID.
- K. **Location (OPTIONAL)** – DO NOT USE THIS FIELD. It would be best to create a location group and assign users to that group.
- L. **Department (OPTIONAL)** – DO NOT USE THIS FIELD. It would be best to create a department group and assign users to that group.
- M. **Custom 1 (OPTIONAL)** – DO NOT USE THIS FIELD.
- N. **Custom 2 (OPTIONAL)** – DO NOT USE THIS FIELD.
- O. **Group(s) membership** – select the group(s) in which you want the user to be a member.
- P. **Create account** – click this button to save your changes.
- Q. **Cancel** – click this button to abandon your changes.

## ADD USERS TO ACCOUNT

- After saving your changes, an *Inserted successfully* banner will appear at the top of the page.



WellSky Free Resources Course Updates Self-Help Guides WellSky Learning Center Store You are logged in as Jerry Seinfeld

Dashboard Enrollment

Add Users to Account / Add Users to Account

**WellSky Learning Center**

Inserted successfully

Page Instructions

### Add Users to Account

Users purchased: 50 Users Remaining: 23

 Search

	First name	Last name 1	Username	Email	Agency	Position	Role	Group	
1	Alton	Benes	alton.benes@serenitynow.org	alton.benes@serenitynow.org	SERENITY NOW Home Health and Hospice	Aide	Manager	Lenexa, KS, Overland Park, KS	
2	Elaine	Benes	elaine.benes@serenitynow.org	elaine.benes@serenitynow.org	SERENITY NOW Home Health and Hospice	COTA	User		
3	Ruthie	Cohen	ruthie.cohen@serenitynow.org	ruthie.cohen@serenitynow.org	SERENITY NOW Home Health and Hospice	Aide	User	Lenexa, KS, LKS - Clinical	
4	Estelle	Costanza	estelle.costanza@serenitynow.org	estelle.costanza@serenitynow.org	SERENITY NOW Home Health and Hospice	Office Staff	User	Lenexa, KS, LKS - Clinical	
5	Frank	Costanza	frank.costanza@serenitynow.org	frank.costanza@serenitynow.org	SERENITY NOW Home Health and Hospice	Bereavement	User	Lenexa, KS, LKS - Clinical	

## Upload Users

The user import file can be used to create and update new users. This file can also be used to enroll existing users into courses.



Create a series of templates with the course information prepopulated so you can quickly and easily add new users to the site AND enroll them into the courses they need to take with one import file by just adding their names and emails to the template. You can also create a series of templates to update your existing users with the courses you want them to complete on an annual basis.

## Preparing the File

1. Open the *Import Template with Course Assignments CSV* and populate the fields.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	firstname	lastname	email	agencyrole	profile_field_position	profile_field_DateofHire	profile_field_EmployeeID	add_group1	add_role1	add_group2	add_role2	remove_group1	remove_role1	courseid1	duedate1	period1
2	Test	User	testuser@test.com	User/Manager/Director		YYYY-MM-DD			Manager/User					10168	MM/DD/YYYY	XX
3																
4																
5																
6																

- Firstname (REQUIRED)** – enter your users' first names.
- Lastname (REQUIRED)** – enter your users' last names.
- Email (REQUIRED)** – enter your users' email addresses all in lowercase. This field will be used to create usernames.
- Agencyrole (REQUIRED)** – enter the user type you want to assign to the user at the agency level.
- Profile\_field\_position (OPTIONAL)** – enter the users' [positions \(aka job titles\)](#).
- Profile\_field\_DateofHire (OPTIONAL)** – enter the users' hire dates in the format shown.
- Profile\_field\_EmployeeID (OPTIONAL)** – enter the users' employee IDs.

## ADD USERS TO ACCOUNT

- H. **Add\_group1 (OPTIONAL)** – enter your group ID here. To find this ID, go to *Enrollment* and select *Group Management* and you'll see your group IDs listed.

ID	Name	Agency	City	State	Users
6076	Lenexa, KS	SERENITY NOW Home Health and Hospice			6
6248	LKS - Clinical	SERENITY NOW Home Health and Hospice			8
6988	Registered Nurse	SERENITY NOW Home Health and Hospice			0
6250	Non-Clinical	SERENITY NOW Home Health and Hospice			0
6990	Administrative Assistant	SERENITY NOW Home Health and Hospice			0
7002	Lenexa, KS - Therapy	SERENITY NOW Home Health and Hospice			0
7003	LKS - PIs	SERENITY NOW Home Health and Hospice			0
6077	Overland Park, KS	SERENITY NOW Home Health and Hospice			2
6991	Clinical	SERENITY NOW Home Health and Hospice			0
6992	Non-Clinical	SERENITY NOW Home Health and Hospice			0
6987	Olathe, KS	SERENITY NOW Home Health and Hospice			0
6993	Clinical	SERENITY NOW Home Health and Hospice			2
6994	Non-Clinical	SERENITY NOW Home Health and Hospice			0

- I. **Add\_role1 (OPTIONAL)** – enter the role you want to assign to the users within the group.
- J. **Add\_group2 (OPTIONAL)** – enter your group ID here.
- K. **Add\_role2 (OPTIONAL)** – enter the role you want to assign to the users within the group.



The file is prepopulated with columns to enroll your user(s) into two additional groups, but you can add as many add\_groupX and add\_roleX columns to the spreadsheet as needed. When adding these additional columns, make sure you number them appropriately in a sequential format (ex. 1, 2, 3, etc.).

- L. **Remove\_group1 (OPTIONAL)** – enter your group ID here to remove users from a group.
- M. **Remove\_role1 (OPTIONAL)** – enter the role you want to remove from users within the group.



The file is prepopulated with columns to remove your user(s) into one additional group, but you can add as many remove\_groupX and remove\_roleX columns to the spreadsheet as needed. When adding these additional columns, make sure you number them appropriately in a sequential format (ex. 1, 2, 3, etc.).

## ADD USERS TO ACCOUNT

- N. **Courseid1 (REQUIRED ONLY IF YOU WANT TO ENROLL USERS IN COURSES)** – enter the course’s ID. To find this information, go to *Enrollment* and select *Add Users to Course*. Search for the course and hold your cursor over the title once its returned in results. In the lower left-hand corner of your browser a URL will appear. At the end of this URL, you’ll see *id=XXXXX*. The series of numbers at the end of the URL is your course ID.

The screenshot shows the 'Enroll Users in Course' interface. The main content area displays a table with the following data:

Agency	Course 1	Seats	Expiration
1 SERENITY NOW Home Health and Hospice	Back Safety	Unlimited	01/01/2050 00:00

A teal arrow points to the browser's address bar, which contains the URL: `https://learningtaging.wellsky.com/course/view.php?id=10402`. The 'id=10402' portion is highlighted.

- O. **DueDate1 (REQUIRED ONLY IF YOU WANT TO ENROLL USERS IN COURSES)** – enter the due date in the format shown.
- P. **Period1 (REQUIRED ONLY IF YOU WANT TO ENROLL USERS IN COURSES)** – enter a number here for how many additional days you want to give the users to complete the course before they are unenrolled from the course.



The file is prepopulated with columns to enroll your user(s) into one course, but you can add as many additional courseIDX, dueDateX, and periodX columns to the spreadsheet as needed. When adding these additional columns, make sure you number them appropriately in a sequential format (ex. 1, 2, 3, etc.).

# ADD USERS TO ACCOUNT

## Uploading the File

### 1. Select *Upload*.

ID	Name	Email	Role	Location
11	David Puddy	david.puddy@serenitynow.org	Coder	
12	Henry Ross	henry.ross@serenitynow.org	Aide	
13	Mrs Ross	mrs.ross@serenitynow.org	MSW	
14	Susan Ross	susan.ross@serenitynow.org	User	
15	Helen Seinfeld	helen.seinfeld@serenitynow.org	Aide	Overland Park, KS
16	Morty Seinfeld	morty.seinfeld@serenitynow.org	Aide	LKS - Clinical, Overland Park, KS
17	Jerry Seinfeld	jerry.seinfeld@serenitynow.org	Office Staff	Clinical
18	Jerry Seinfeld - TESTING - NOT FOR DEMO USE	jerry.seinfeld@serenitynow.com	Manager	Clinical
19	Tim Whatley	twhatley@email.com	Aide	Lenexa, KS

### 2. Drop your import file into the upload box.

WellSky Learning Center

Upload

File

Choose a file... Maximum size for new files: 1000 MB

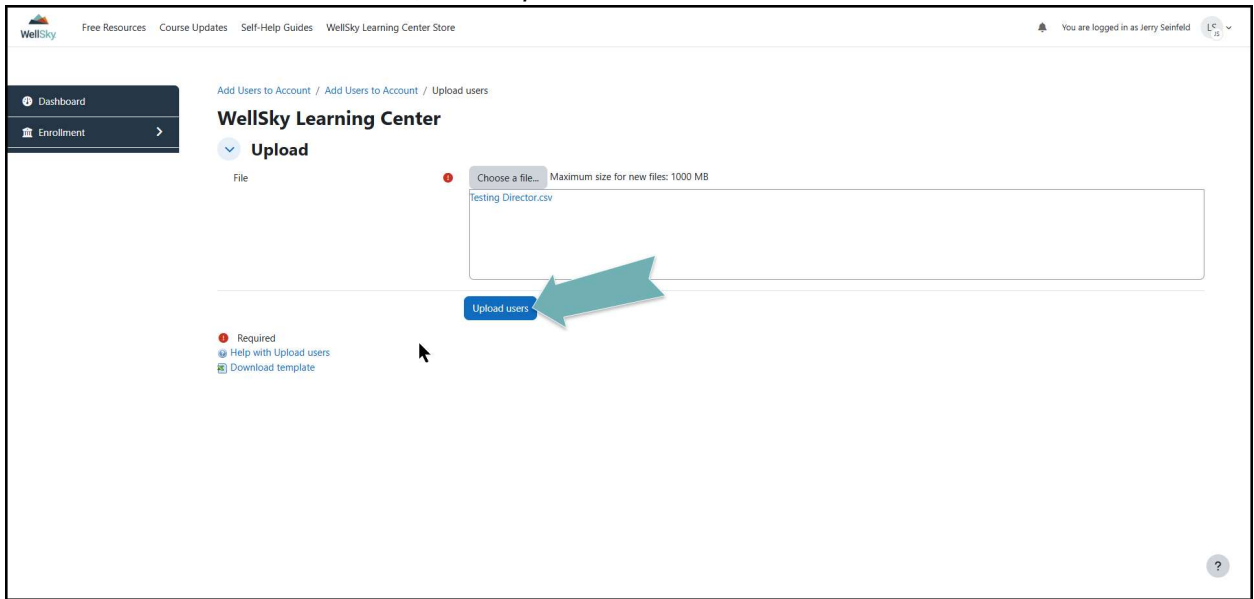
You can drag and drop files here to add them.

Upload users

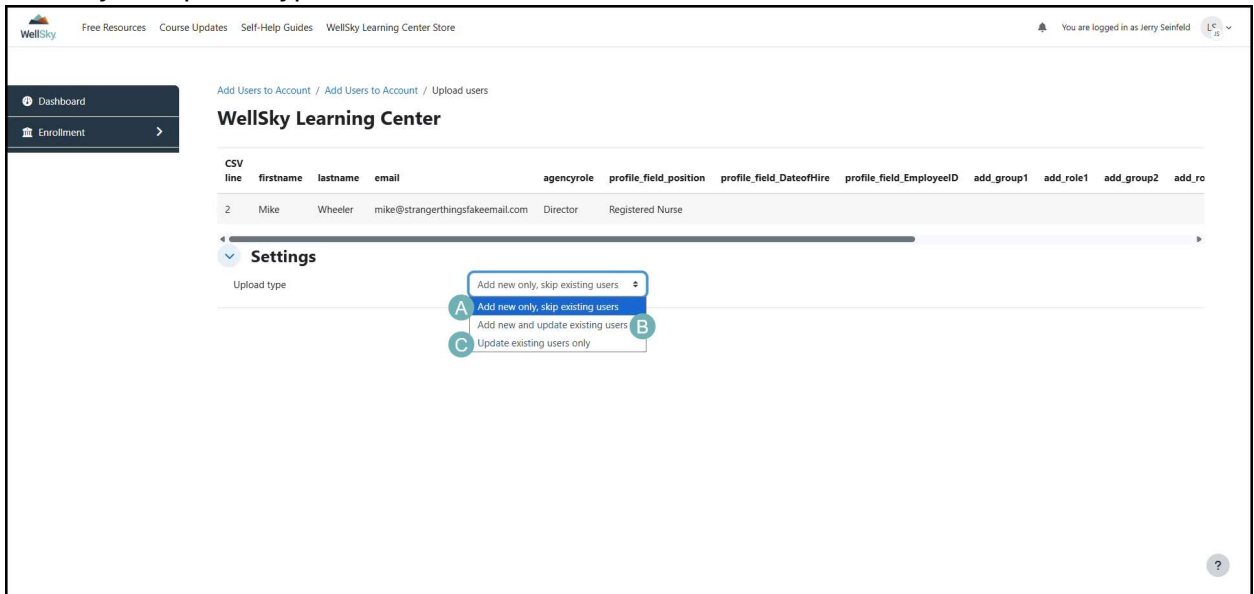
- Required
- Help with Upload users
- Download template

## ADD USERS TO ACCOUNT

- Once the file has been loaded, click *Upload Users*.



- Select your upload type.



- Add new only, skip existing users** – select this option if your file contains only new users.
- Add new and update existing users** – select this option if your file contains new users and changes to existing users.
- Update existing users only** – select this option if your file contains only changes to existing users.

## ADD USERS TO ACCOUNT

### 5. Click *Upload Users*.

WellSky Learning Center

CSV

line	firstname	lastname	email	agencyrole	profile_field_position	profile_field_DateofHire	profile_field_EmployeeID	add_group1	add_role1	add_group2	add_ro
2	Mike	Wheeler	mike@strangerthingsfakeemail.com	Director	Registered Nurse						

Settings

Upload type: Add new only, skip existing users

Upload users

### 6. If your file was properly formatted, you'll then be taken to a confirmation page to review your results.

WellSky Learning Center

Status	CSV line	ID	Username	First name	Last name	Email address	Password	Authentication	Enrollments	Suspended account	Theme	Delete
New user	2	161731	swheeler@sernoemail.com	Sam	Wheeler	swheeler@sernoemail.com		manual		No		

Users created: 1  
Users having a weak password: 0  
Errors: 0

Continue

## ADD USERS TO ACCOUNT

### Edit a User



Send an email to [learning@wellsky.com](mailto:learning@wellsky.com) if the information you need to update is User Type. Only WellSky Site Administrators can update this field.

1. If needed, use the search field to search for the user by first name, last name, or email address.

The screenshot shows the 'Add Users to Account' page in the WellSky Learning Center. The page header includes 'Free Resources', 'Course Updates', 'Self-Help Guides', and 'WellSky Learning Center Store'. The user is logged in as 'Jerry Seinfeld'. The page title is 'WellSky Learning Center' and the sub-header is 'Add Users to Account'. Below the sub-header, it says 'Users purchased: 50 Users Remaining: 30'. A search bar is located below the sub-header, and a teal arrow points to it. Below the search bar is a table with columns: First name, Last name, Username, Email, Agency, Position, Role, and Group. The table contains 7 rows of user data.

	First name	Last name	Username	Email	Agency	Position	Role	Group
1	Alton	Benes	alton.benes@serenitynow.org	alton.benes@serenitynow.org	SERENITY NOW Home Health and Hospice	Aide	Manager	Lenexa, KS, Overland Park, KS
2	Elaine	Benes	elaine.benes@serenitynow.org	elaine.benes@serenitynow.org	SERENITY NOW Home Health and Hospice	COTA	User	
3	Ruthie	Cohen	ruthie.cohen@serenitynow.org	ruthie.cohen@serenitynow.org	SERENITY NOW Home Health and Hospice	Aide	User	Lenexa, KS, LKS - Clinical
4	Estelle	Costanza	estelle.costanza@serenitynow.org	estelle.costanza@serenitynow.org	SERENITY NOW Home Health and Hospice	Office Staff	User	Lenexa, KS, LKS - Clinical
5	Frank	Costanza	frank.costanza@serenitynow.org	frank.costanza@serenitynow.org	SERENITY NOW Home Health and Hospice	Bereavement	User	Lenexa, KS, LKS - Clinical
6	George	Costanza	george.costanza@serenitynow.org	george.costanza@serenitynow.org	SERENITY NOW Home Health and Hospice	MSW	User	LKS - Clinical
7	Clark	Kent	email@email.com	email@email.com	SERENITY NOW Home		Manager	LKS - Clinical

2. Click the gear icon on the user's row that you want to edit.

The screenshot shows the 'Add Users to Account' page in the WellSky Learning Center. The page header includes 'Free Resources', 'Course Updates', 'Self-Help Guides', and 'WellSky Learning Center Store'. The user is logged in as 'Jerry Seinfeld'. The page title is 'WellSky Learning Center' and the sub-header is 'Add Users to Account'. Below the sub-header, it says 'Users purchased: 50 Users Remaining: 31'. A search bar is located below the sub-header. Below the search bar is a table with columns: First name, Last name, Username, Email, Agency, Position, Role, and Group. The table contains 7 rows of user data. A teal arrow points to the gear icon on the first row of the table.

	First name	Last name	Username	Email	Agency	Position	Role	Group
1	Alton	Benes	alton.benes@serenitynow.org	alton.benes@serenitynow.org	SERENITY NOW Home Health and Hospice	Aide	Manager	Lenexa, KS, Overland Park, KS
2	Elaine	Benes	elaine.benes@serenitynow.org	elaine.benes@serenitynow.org	SERENITY NOW Home Health and Hospice	COTA	User	
3	Ruthie	Cohen	ruthie.cohen@serenitynow.org	ruthie.cohen@serenitynow.org	SERENITY NOW Home Health and Hospice	Aide	User	Lenexa, KS, LKS - Clinical
4	Estelle	Costanza	estelle.costanza@serenitynow.org	estelle.costanza@serenitynow.org	SERENITY NOW Home Health and Hospice	Office Staff	User	Lenexa, KS, LKS - Clinical
5	Frank	Costanza	frank.costanza@serenitynow.org	frank.costanza@serenitynow.org	SERENITY NOW Home Health and Hospice	Bereavement	User	Lenexa, KS, LKS - Clinical
6	George	Costanza	george.costanza@serenitynow.org	george.costanza@serenitynow.org	SERENITY NOW Home Health and Hospice	MSW	User	LKS - Clinical
7	Clark	Kent	email@email.com	email@email.com	SERENITY NOW Home		Manager	LKS - Clinical

3. Make your edits.

WellsSky Free Resources Course Updates Self-Help Guides WellsSky Learning Center Store You are logged in as Jerry Seinfeld

Dashboard Enrollment

Add Users to Account / Edit User

### WellsSky Learning Center

#### Edit User

User Elaine Benes

Username

First name

Last name

Agency SERENITY NOW Home Health and Hospice

User Type

Email address

Position

Date of Hire  Enable

Employee ID

Location

Department

Custom 1

Custom 2

Group(s) membership 

- Administrative Assistant
- Clinical
- Clinical
- Lenexa, KS
- Lenexa, KS - Therapy
- LKS - Clinical
- LKS - P/Ts
- Non-Clinical
- Non-Clinical
- Non-Clinical

Hold CTRL to select multiple

Required

## ADD USERS TO ACCOUNT

- Click *Submit* to save your changes.

WellSky Free Resources Course Updates Self-Help Guides WellSky Learning Center Store You are logged in as Jerry Seinfeld

Dashboard Enrollment

Email address

Position

Date of Hire  Enable

Employee ID

Location

Department

Custom 1

Custom 2

Group(s) membership

Hold CTRL to select multiple

Required

- An *Updated successfully* banner will appear at the top of the screen.

WellSky Free Resources Course Updates Self-Help Guides WellSky Learning Center Store You are logged in as Jerry Seinfeld

Dashboard Enrollment

Add Users to Account / Add Users to Account

**WellSky Learning Center**

Updated successfully

Page Instructions

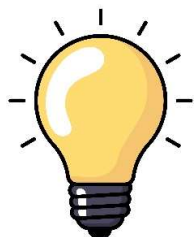
**Add Users to Account**

Users purchased: 50 Users Remaining: 24

1 2

	First name	Last name	Username	Email	Agency	Position	Role	Group
1	Alton	Benes	alton.benes@serenitynow.org	alton.benes@serenitynow.org	SERENITY NOW Home Health and Hospice	Aide	Manager	Lenexa, KS, Overland Park, KS
2	Elaine	Benes	elaine.benes@serenitynow.org	elaine.benes@serenitynow.org	SERENITY NOW Home Health and Hospice	COTA	User	
3	Ruthie	Cohen	ruthie.cohen@serenitynow.org	ruthie.cohen@serenitynow.org	SERENITY NOW Home Health and Hospice	Aide	User	Lenexa, KS, LKS - Clinical
4	Estelle	Costanza	estelle.costanza@serenitynow.org	estelle.costanza@serenitynow.org	SERENITY NOW Home Health and	Office Staff	User	Lenexa, KS, LKS - Clinical

## Suspend a User



Send an email to [learning@wellsky.com](mailto:learning@wellsky.com) if you need to suspend someone with the Director role. Only WellSky Site Administrators can suspend these accounts.

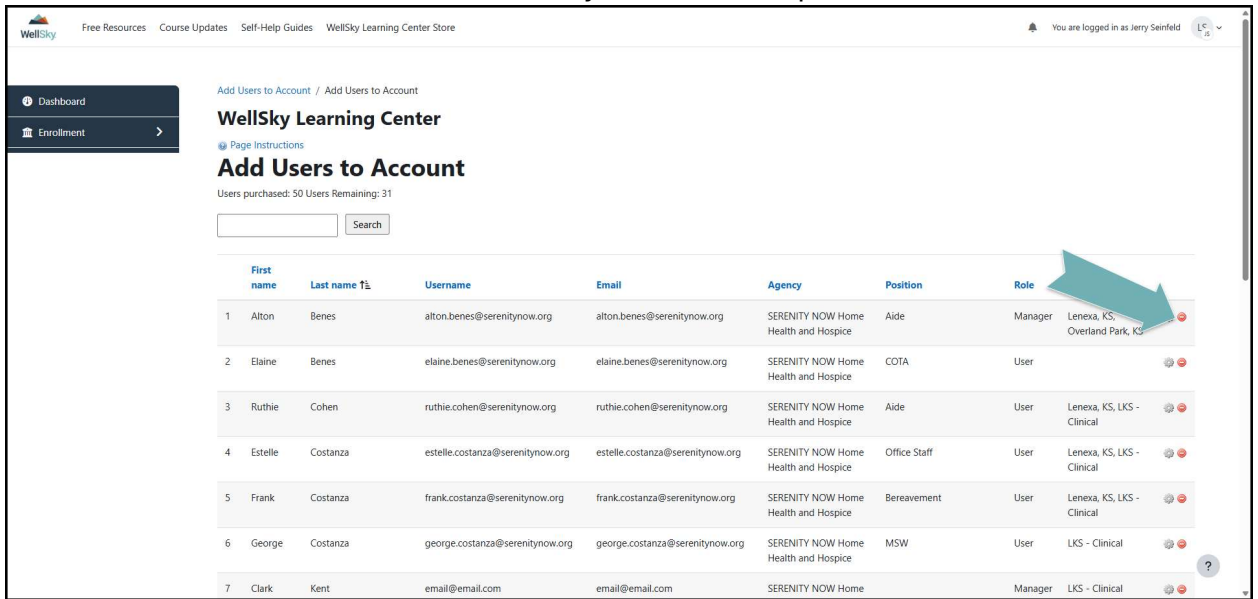
1. If needed, use the search field to search for the user by first name, last name, or email address.

The screenshot shows the 'Add Users to Account' page in the WellSky Learning Center. The page includes a search bar and a table of existing users. A teal arrow points to the search field.

	First name	Last name	Username	Email	Agency	Position	Role	Group
1	Alton	Benes	alton.benes@serenitynow.org	alton.benes@serenitynow.org	SERENITY NOW Home Health and Hospice	Aide	Manager	Lenexa, KS, Overland Park, KS
2	Elaine	Benes	elaine.benes@serenitynow.org	elaine.benes@serenitynow.org	SERENITY NOW Home Health and Hospice	COTA	User	
3	Ruthie	Cohen	ruthie.cohen@serenitynow.org	ruthie.cohen@serenitynow.org	SERENITY NOW Home Health and Hospice	Aide	User	Lenexa, KS, LKS - Clinical
4	Estelle	Costanza	estelle.costanza@serenitynow.org	estelle.costanza@serenitynow.org	SERENITY NOW Home Health and Hospice	Office Staff	User	Lenexa, KS, LKS - Clinical
5	Frank	Costanza	frank.costanza@serenitynow.org	frank.costanza@serenitynow.org	SERENITY NOW Home Health and Hospice	Bereavement	User	Lenexa, KS, LKS - Clinical
6	George	Costanza	george.costanza@serenitynow.org	george.costanza@serenitynow.org	SERENITY NOW Home Health and Hospice	MSW	User	LKS - Clinical
7	Clark	Kent	email@email.com	email@email.com	SERENITY NOW Home		Manager	LKS - Clinical

## ADD USERS TO ACCOUNT

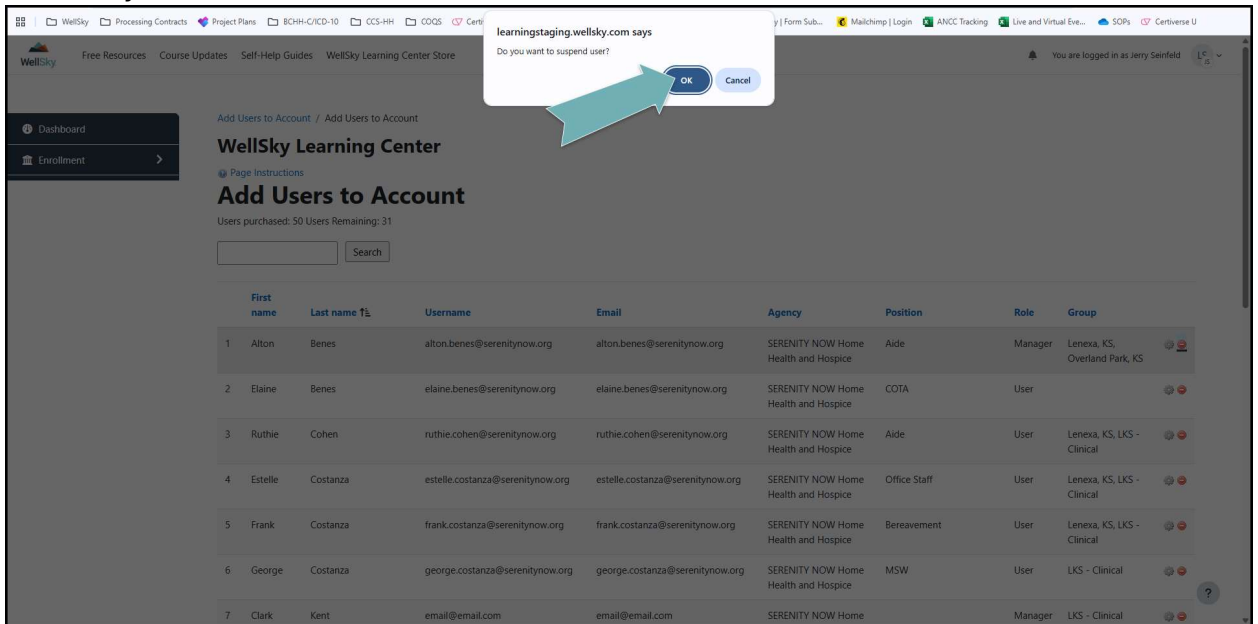
- Click the red button on the user's row that you want to suspend.



The screenshot shows the 'Add Users to Account' page in the Wellsky Learning Center. The page title is 'Wellsky Learning Center' and the subtitle is 'Add Users to Account'. Below the title, it says 'Users purchased: 50 Users Remaining: 31'. There is a search bar with a 'Search' button. Below the search bar is a table with 7 rows of user information. The first row is highlighted, and a red button is visible in the 'Role' column of that row. A red arrow points to this button.

	First name	Last name	Username	Email	Agency	Position	Role
1	Alton	Benes	alton.benes@serenitynow.org	alton.benes@serenitynow.org	SERENITY NOW Home Health and Hospice	Aide	Manager Lenexa, KS, Overland Park, KS
2	Elaine	Benes	elaine.benes@serenitynow.org	elaine.benes@serenitynow.org	SERENITY NOW Home Health and Hospice	COTA	User
3	Ruthie	Cohen	ruthie.cohen@serenitynow.org	ruthie.cohen@serenitynow.org	SERENITY NOW Home Health and Hospice	Aide	User Lenexa, KS, LKS - Clinical
4	Estelle	Costanza	estelle.costanza@serenitynow.org	estelle.costanza@serenitynow.org	SERENITY NOW Home Health and Hospice	Office Staff	User Lenexa, KS, LKS - Clinical
5	Frank	Costanza	frank.costanza@serenitynow.org	frank.costanza@serenitynow.org	SERENITY NOW Home Health and Hospice	Bereavement	User Lenexa, KS, LKS - Clinical
6	George	Costanza	george.costanza@serenitynow.org	george.costanza@serenitynow.org	SERENITY NOW Home Health and Hospice	MSW	User LKS - Clinical
7	Clark	Kent	email@email.com	email@email.com	SERENITY NOW Home		Manager LKS - Clinical

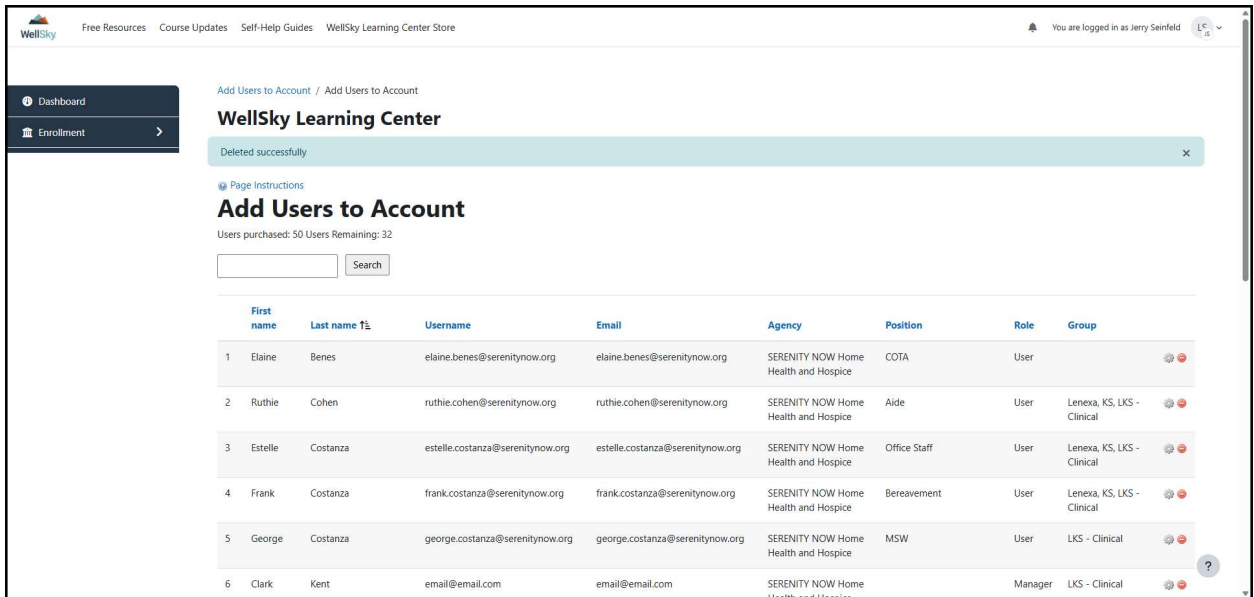
- Confirm your actions.



The screenshot shows the same 'Add Users to Account' page as above, but with a confirmation dialog box overlaid. The dialog box is titled 'learningstaging.wellsky.com says' and contains the text 'Do you want to suspend user?'. There are two buttons: 'OK' and 'Cancel'. A red arrow points to the 'OK' button.

## ADD USERS TO ACCOUNT

4. A *Deleted successfully* banner will appear at the top of the screen. The user has **NOT** been deleted. The account and history are still intact within the WLC. Their access to the WLC has been removed but can be activated when needed.



WellSky Free Resources Course Updates Self-Help Guides WellSky Learning Center Store You are logged in as Jerry Seinfeld

Dashboard Enrollment

Add Users to Account / Add Users to Account

### WellSky Learning Center

Deleted successfully

Page Instructions

## Add Users to Account

Users purchased: 50 Users Remaining: 32

	First name	Last name	Username	Email	Agency	Position	Role	Group
1	Elaine	Benes	elaine.benes@serenitynow.org	elaine.benes@serenitynow.org	SERENITY NOW Home Health and Hospice	COTA	User	
2	Ruthie	Cohen	ruthie.cohen@serenitynow.org	ruthie.cohen@serenitynow.org	SERENITY NOW Home Health and Hospice	Aide	User	Lenexa, KS, LKS - Clinical
3	Estelle	Costanza	estelle.costanza@serenitynow.org	estelle.costanza@serenitynow.org	SERENITY NOW Home Health and Hospice	Office Staff	User	Lenexa, KS, LKS - Clinical
4	Frank	Costanza	frank.costanza@serenitynow.org	frank.costanza@serenitynow.org	SERENITY NOW Home Health and Hospice	Bereavement	User	Lenexa, KS, LKS - Clinical
5	George	Costanza	george.costanza@serenitynow.org	george.costanza@serenitynow.org	SERENITY NOW Home Health and Hospice	MSW	User	LKS - Clinical
6	Clark	Kent	email@email.com	email@email.com	SERENITY NOW Home Health and Hospice		Manager	LKS - Clinical

## Activate Suspended User



Send an email to [learning@wellsky.com](mailto:learning@wellsky.com) if you need to activate someone with the Director role. Only WellSky Site Administrators can activate these accounts.

1. Click *Activate Suspended User*.

The screenshot shows the WellSky user management interface. A table lists users with columns for ID, Name, Email, Role, and Location. A teal arrow points from the 'Activate Suspended User' button at the bottom to the user list.

ID	Name	Email	Role	Location
11	David Puddy	david.puddy@serenitynow.org	Coder	
12	Henry Ross	henry.ross@serenitynow.org	Aide	
13	Mrs Ross	mrs.ross@serenitynow.org	MSW	
14	Susan Ross	susan.ross@serenitynow.org		
15	Helen Seinfeld	helen.seinfeld@serenitynow.org	Aide	Overland Park, KS
16	Morty Seinfeld	morty.seinfeld@serenitynow.org	Aide	LKS - Clinical, Overland Park, KS
17	Jerry Seinfeld	jerry.seinfeld@serenitynow.org	Office Staff	
18	Jerry Seinfeld - TESTING - NOT FOR DEMO USE	jerry.seinfeld@serenitynow.com	Manager	
19	Tim Whatley	twhatley@email.com	Aide	Lenexa, KS

Buttons: Add, Upload, Activate Suspended User, X, ?

## ADD USERS TO ACCOUNT

2. If needed, use the search field to search for the user by first name, last name, or email address.

WellSky Learning Center  
Activate Suspended User

education  Search

	First name	Last name	Email	Agency	Role	Group	
1	Silvio	Dante	sdante@email.com	SERENITY NOW Home Health and Hospice	User		✓
2	Jane	Doe	jdoe@email.com	SERENITY NOW Home Health and Hospice	User	Overland Park, KS	✓
3	John	Doe-Serenity	jds@noemail.com	SERENITY NOW Home Health and Hospice	User		✓
4	Janet	Dow	jdow@email.com	SERENITY NOW Home Health and Hospice	User	Lenexa, KS, Overland Park, KS	✓
5	Laurel Testing Welcome	Email Stith	laurestith@gmail.com	SERENITY NOW Home Health and Hospice	User		✓
6	Learning	IsFun	learningisfun@noemail.com	SERENITY NOW Home Health and Hospice	Manager	Lenexa, KS, LKS - Clinical	✓
7	Sam	Smith	ssmith@email.com	SERENITY NOW Home Health and Hospice	User	Overland Park, KS	✓
8	Barbara	Smith	bsmith@email.com	SERENITY NOW Home Health and Hospice	User	Overland Park, KS	✓
9	Donnie	Smith	dsmith@email.com	SERENITY NOW Home Health and Hospice	User	Overland Park, KS	✓
10	Jane	Smith-Serenity	jss@noemail.com	SERENITY NOW Home Health and Hospice	User		✓
11	Christopher	Soprano	csoprano@email.com	SERENITY NOW Home Health and Hospice	User	LKS - Clinical, Overland Park, KS	✓

3. Click the green checkmark on the row of the user who needs to be activated.

WellSky Learning Center  
Activate Suspended User

education  Search

	First name	Last name	Email	Agency	Role	
1	Education	Testing	sernotest@no.com	SERENITY NOW Home Health and Hospice	User	✓

## ADD USERS TO ACCOUNT

### 4. Confirm your actions.

learningstaging.wellsky.com says  
Do you want to activate record?

OK Cancel

WellSky Learning Center  
Activate Suspended User

education Search

	First name	Last name	Email	Agency	Role	Group
1	Education	Testing	sernotest@no.com	SERENITY NOW Home Health and Hospice	User	

### 5. An *Activated successfully* banner will appear at the top of the screen.

Activated successfully

WellSky Learning Center  
Activate Suspended User

Search

	First name	Last name	Email	Agency	Role	Group
1	Silvio	Dante	sdante@email.com	SERENITY NOW Home Health and Hospice	User	✓
2	Jane	Doe	jdoe@email.com	SERENITY NOW Home Health and Hospice	User	Overland Park, KS ✓
3	John	Doe-Serenity	jds@noemail.com	SERENITY NOW Home Health and Hospice	User	✓
4	Janet	Dow	jdow@email.com	SERENITY NOW Home Health and Hospice	User	Lenexa, KS, Overland Park, KS ✓
5	Laurel Testing Welcome	Email Stith	laurestith@gmail.com	SERENITY NOW Home Health and Hospice	User	✓
6	Learning	IsFun	learningsifun@noemail.com	SERENITY NOW Home Health and Hospice	Manager	Lenexa, KS, LKS - Clinical ✓
7	Sam	Smith	ssmith@email.com	SERENITY NOW Home Health and Hospice	User	Overland Park, KS ✓
8	Barbara	Smith	bsmith@email.com	SERENITY NOW Home Health and Hospice	User	Overland Park, KS ✓
9	Donnie	Smith	dsmith@email.com	SERENITY NOW Home Health and Hospice	User	Overland Park, KS ✓
10	Jane	Smith-Serenity	jss@noemail.com	SERENITY NOW Home Health and Hospice	User	✓