

## GROUP MANAGEMENT

Groups are used to organize Users and manage activities more effectively. Groups simplify the reporting and enrollment processes. Groups also make it possible to utilize the Manager role, which enables Managers to take over some responsibilities that would otherwise be handled by Directors and/or Administrative Staff.

In this handout, we'll cover how to:

- [Create a Group](#)
- [Add Users to a Group](#)
- [Remove Users from a Group](#)
- [Delete a Group](#)

## Create a Group

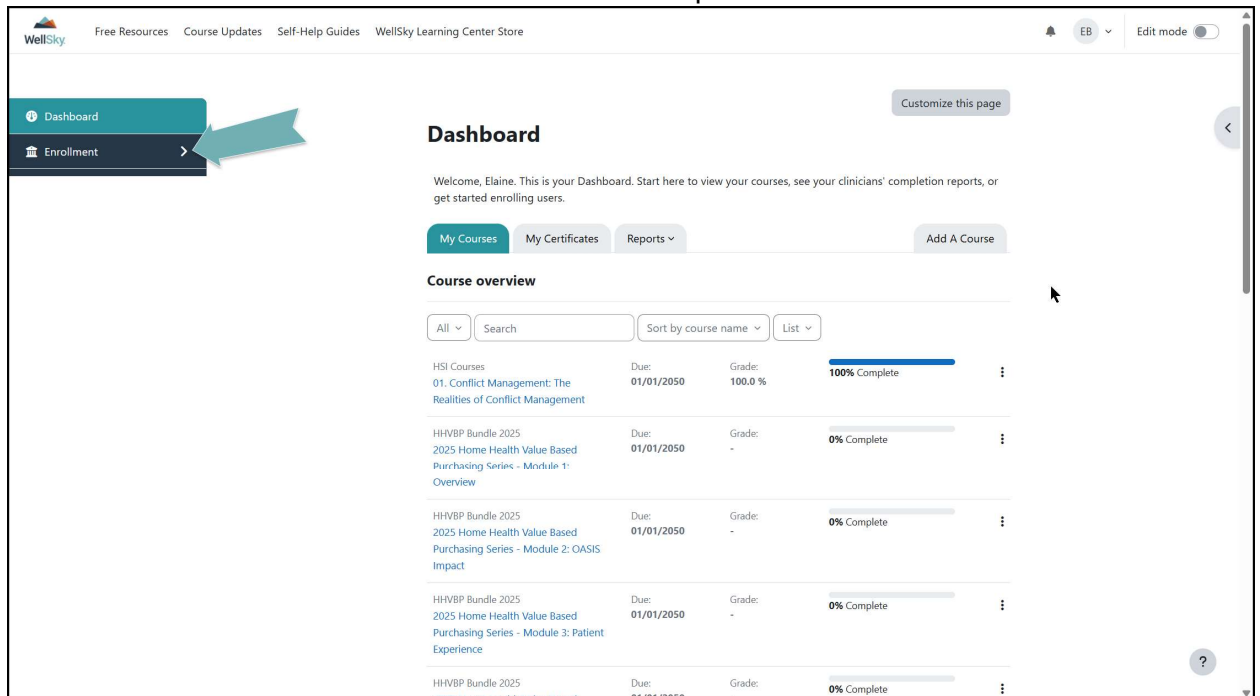
Your first step will be to determine your hierarchy.

When creating your groups, there are a few questions you should ask yourself:

1. How do I currently assign my training?
2. Do different job roles receive different education?
3. Will a User's group need to frequently change with this set-up?

By asking yourself these questions, you can determine if basic groups such as Non-Clinical and Clinical would be the most beneficial, or if something more in depth would work best for your agency. If your RNs receive one group of courses, and your PTs receive another, it may be more helpful for your agency to be grouped based on job roles.

1. Click the *Enrollment* tab from the left-hand admin panel.



The screenshot displays the WellSky dashboard interface. The left-hand admin panel is visible, with the 'Enrollment' tab highlighted and indicated by a teal arrow. The main dashboard area shows a 'Dashboard' header, a welcome message for Elaine, and navigation tabs for 'My Courses', 'My Certificates', and 'Reports'. Below this is a 'Course overview' section with a search bar and a table of courses. The table includes columns for course name, due date, grade, and completion status.

Course Name	Due	Grade	Completion Status
HSI Courses 01_Conflict Management: The Realities of Conflict Management	01/01/2050	100.0 %	100% Complete
HHVBP Bundle 2025 2025 Home Health Value Based Purchasing Series - Module 1: Overview	01/01/2050	-	0% Complete
HHVBP Bundle 2025 2025 Home Health Value Based Purchasing Series - Module 2: OASIS Impact	01/01/2050	-	0% Complete
HHVBP Bundle 2025 2025 Home Health Value Based Purchasing Series - Module 3: Patient Experience	01/01/2050	-	0% Complete
HHVBP Bundle 2025 2025 Home Health Value Based Purchasing Series - Module 4: Patient Safety	01/01/2050	-	0% Complete

# GROUP MANAGEMENT

## 2. Select *Group Management* from the dropdown.

The screenshot shows the WellSky dashboard interface. On the left, a dark sidebar contains a menu with the following items: Dashboard, Enrollment, Add Users to Account, Enroll Users in Course, Group Management (highlighted with a teal arrow), Learning Plans, and Log. The main content area displays the 'Dashboard' with a welcome message for Elaine and a 'Course overview' section. The course overview table lists several courses with their completion status. The 'Add A Course' button is visible in the top right of the course overview section.

Course Name	Due	Grade	Completion
HSI Courses 01_Conflict Management: The Realities of Conflict Management	01/01/2050	100.0 %	100% Complete
HHVBP Bundle 2025 2025 Home Health Value Based Purchasing Series - Module 1: Overview	01/01/2050	-	0% Complete
HHVBP Bundle 2025 2025 Home Health Value Based Purchasing Series - Module 2: OASIS Impact	01/01/2050	-	0% Complete
HHVBP Bundle 2025 2025 Home Health Value Based Purchasing Series - Module 3: Patient Experience	01/01/2050	-	0% Complete
HHVBP Bundle 2025 2025 Home Health Value Based Purchasing Series - Module 4: Care Coordination	01/01/2050	-	0% Complete

## 3. Click *Add* below any existing groups.

The screenshot shows the 'WellSky Learning Center Group Management' page. It features a table with columns for ID, Name, Agency, City, State, and Users. An 'Add' button is located at the bottom right of the table. A teal arrow points to this button. The table contains 14 rows of group data, all associated with 'SERENITY NOW Home Health and Hospice'.

ID	Name	Agency	City	State	Users
6076	Lenexa, KS	SERENITY NOW Home Health and Hospice			7
6248	LKS - Clinical	SERENITY NOW Home Health and Hospice			9
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 - PTs	SERENITY NOW Home Health and Hospice			0
6077	Overland Park, KS	SERENITY NOW Home Health and Hospice			8
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			0
6994	Non-Clinical	SERENITY NOW Home Health and Hospice			0

## GROUP MANAGEMENT

- In the *Name* field add a title for your group that will easily denote which learners should be added to it.

The screenshot shows the 'WellSky Learning Center Group Configuration' page. The breadcrumb trail is 'Group Management / Group Configuration / Add'. The page title is 'WellSky Learning Center Group Configuration'. The 'Group' section includes the following fields: Agency (SERENITY NOW Home Health and Hospice), Parent (Top), Name (empty, highlighted with a red box and a teal arrow), City (empty), and State (Select). At the bottom, there are 'Submit' and 'Cancel' buttons. A red error icon and the text 'Required' are visible below the 'Name' field.

- Scroll down to the bottom of the page and click *Submit*.

The screenshot shows the 'WellSky Learning Center Group Configuration' page. The breadcrumb trail is 'Group Management / Group Configuration / Add'. The page title is 'WellSky Learning Center Group Configuration'. The 'Group' section includes the following fields: Agency (SERENITY NOW Home Health and Hospice), Parent (Top), Name (Registered Nurses), City (empty), and State (Select). At the bottom, there are 'Submit' and 'Cancel' buttons. A red error icon and the text 'Required' are visible below the 'Name' field. A teal arrow points to the 'Submit' button.

## GROUP MANAGEMENT

- After saving your changes, you'll be redirected back to the *Group Management* page where you can see your newly created group.

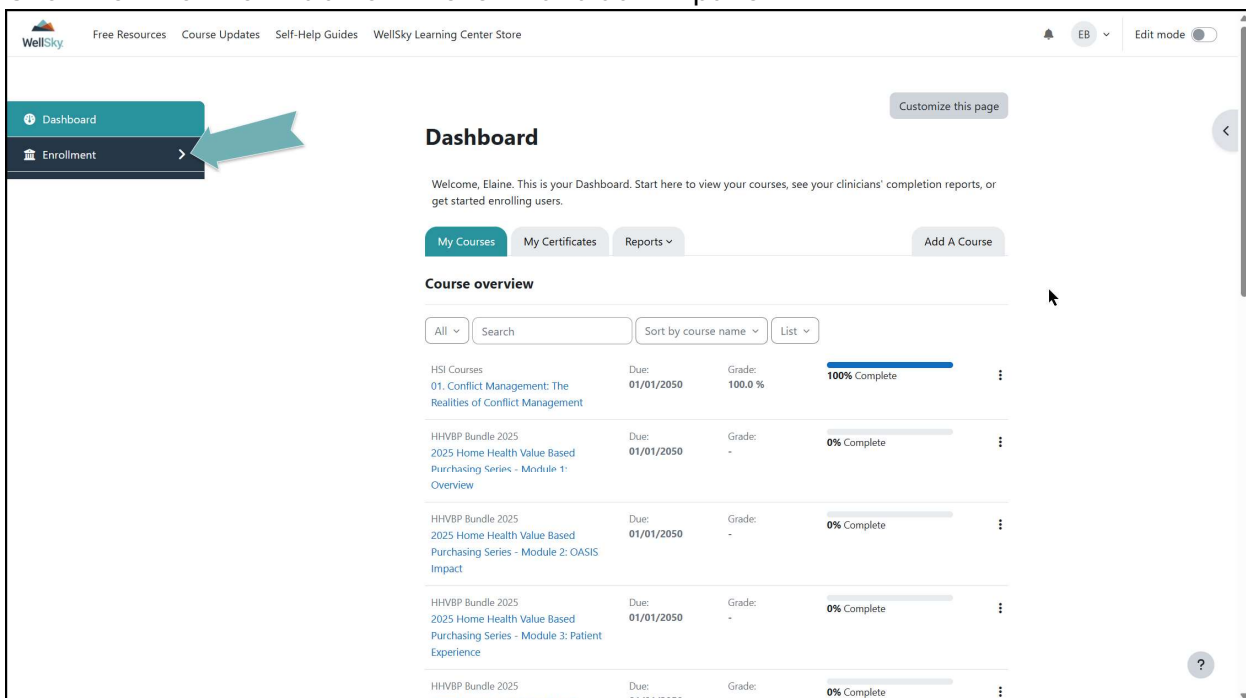
WellSky Learning Center  
Group Management

ID	Name	Agency	City	State	Users
6076	Lenexa, KS	SERENITY NOW Home Health and Hospice			7
6248	LKS - Clinical	SERENITY NOW Home Health and Hospice			9
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 - PTs	SERENITY NOW Home Health and Hospice			0
6077	Overland Park, KS	SERENITY NOW Home Health and Hospice			8
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			0
6994	Non-Clinical	SERENITY NOW Home Health and Hospice			0
7054	Registered Nurses	SERENITY NOW Home Health and Hospice			0

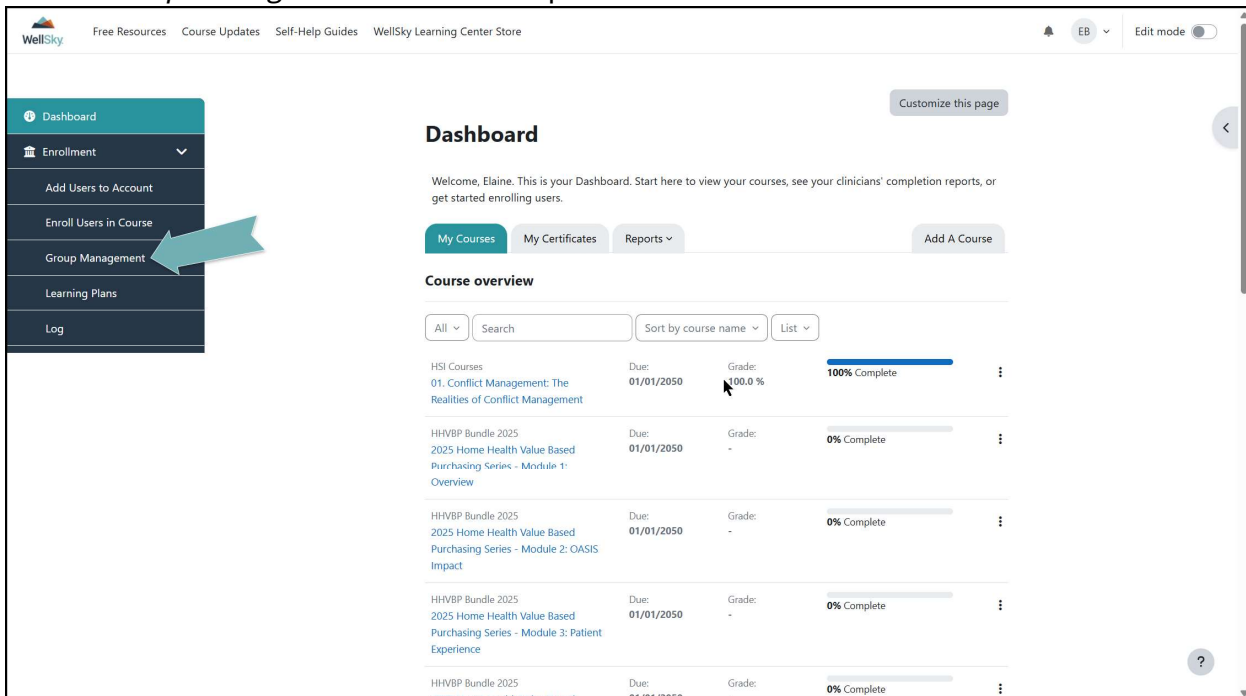
- Repeat steps 3 through 6 until all your groups have been created.

## Add Users to a Group

1. Click the *Enrollment* tab from the left-hand admin panel.



2. Select *Group Management* from the dropdown.



# GROUP MANAGEMENT

3. Select the silhouette with a plus sign icon from the right-hand side of the group you would like to manage.

The screenshot displays the 'WellSky Learning Center Group Management' interface. At the top, there are navigation links for 'Free Resources', 'Course Updates', 'Self-Help Guides', and 'WellSky Learning Center Store'. A sidebar on the left contains 'Dashboard' and 'Enrollment' options. The main content area shows a table of groups. The table has columns for 'ID', 'Name', 'Agency', 'City', 'State', and 'Users'. The 'Users' column contains icons for user management, including a silhouette with a plus sign. A teal arrow points to this plus icon for the group with ID 7054. There are also 'Add' buttons at the top right and bottom left of the table.

ID	Name	Agency	City	State	Users
6076	Lenexa, KS	SERENITY NOW Home Health and Hospice			7
6248	LKS - Clinical	SERENITY NOW Home Health and Hospice			9
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 - PTs	SERENITY NOW Home Health and Hospice			0
6077	Overland Park, KS	SERENITY NOW Home Health and Hospice			8
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			0
6994	Non-Clinical	SERENITY NOW Home Health and Hospice			0
7054	Registered Nurses	SERENITY NOW Home Health and Hospice			0

4. Select the Users from the *Potential Members* list on the right-hand side of your screen.

The screenshot shows the 'WellSky Learning Center Group Member Assignment' page for 'Registered Nurses'. The page includes a navigation menu on the left with 'Dashboard' and 'Enrollment' options. The main content area is titled 'Group Member Assignment' and 'Registered Nurses'. It features a 'Member type' dropdown set to 'Member' and a 'Page Instructions' link. Below this is a 'Current Members' list, which is currently empty, with 'Add', 'Remove', 'Add All', and 'Remove All' buttons. To the right is a 'Potential Members' list containing 16 test users, with a 'Clear' button below it. A teal arrow points to the 'Potential Members' list. The page also has a top navigation bar with 'Free Resources', 'Course Updates', 'Self-Help Guides', and 'WellSky Learning Center Store', and a user profile icon 'EB' in the top right corner.



You can multi-select Users from the Potential Members list by holding down the CTRL key while clicking your Users' names.

5. Once all Users have been selected, click *Add*.

The screenshot shows the 'WellSky Learning Center' interface for 'Group Member Assignment' for 'Registered Nurses'. The page includes a navigation sidebar with 'Dashboard' and 'Enrollment' options. The main content area shows the current group management state. A 'Member type' dropdown is set to 'Member'. The 'Current Members' list is empty, and a teal arrow points to the 'Add' button. The 'Potential Members' list contains 20 test users, with the first 10 selected. The 'Add' button is highlighted, indicating the next step in the process.

WellSky Learning Center  
Group Member Assignment  
Registered Nurses

Member type: Member [Page Instructions](#)

Current Members

Clear

Finish

Potential Members

- 127569, Test User (testuser127569@testemail.com, Manager)
- 127570, Test User (testuser127570@testemail.com, User)
- 127571, Test User (testuser127571@testemail.com, User)
- 127572, Test User (testuser127572@testemail.com, User)
- 127573, Test User (testuser127573@testemail.com, User)
- 127574, Test User (testuser127574@testemail.com, User)
- 127575, Test User (testuser127575@testemail.com, User)
- 127576, Test User (testuser127576@testemail.com, User)
- 127577, Test User (testuser127577@testemail.com, User)
- 127578, Test User (testuser127578@testemail.com, Manager)
- 127579, Test User (testuser127579@testemail.com, User)
- 127580, Test User (testuser127580@testemail.com, User)
- 127581, Test User (testuser127581@testemail.com, User)
- 127583, Test User (testuser127583@testemail.com, Manager)
- 130791, Test User (testuser130791@testemail.com, User)
- 130967, Test User (testuser130967@testemail.com, User)
- 131459, Test User (testuser131459@testemail.com, User)
- 131460, Test User (testuser131460@testemail.com, User)
- 131461, Test User (testuser131461@testemail.com, User)
- 131462, Test User (testuser131462@testemail.com, User)

Clear

- Click *Finish* after adding all Users to the *Current Members* list on the left-hand side of your screen.

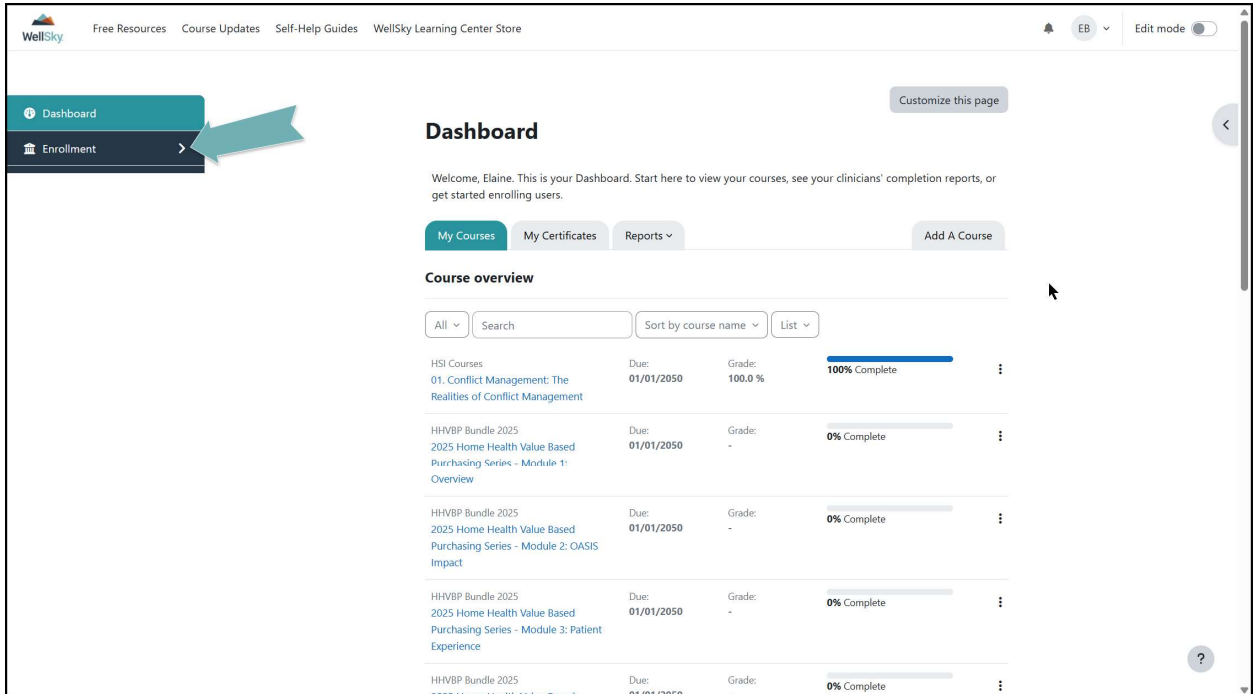
The screenshot shows the 'Group Member Assignment' page for 'Registered Nurses'. The page has a top navigation bar with 'WellSky', 'Free Resources', 'Course Updates', 'Self-Help Guides', and 'WellSky Learning Center Store'. A left sidebar contains 'Dashboard' and 'Enrollment'. The main content area is titled 'WellSky Learning Center Group Member Assignment Registered Nurses'. Below the title, there is a 'Member type:' dropdown set to 'Member' and a 'Page Instructions' link. The interface is divided into two main sections: 'Current Members' and 'Potential Members'. The 'Current Members' list contains 10 test users, with the last one, '127581, Test User (testuser127581@testemail.com, User)', highlighted. Below this list are 'Clear' and 'Finish' buttons. A teal arrow points to the 'Finish' button. The 'Potential Members' list contains 20 test users. Between the two lists are buttons for 'Add', 'Remove', 'Add All', and 'Remove All'. A 'Clear' button is also present at the bottom of the 'Potential Members' list. A help icon (?) is located in the bottom right corner of the interface.



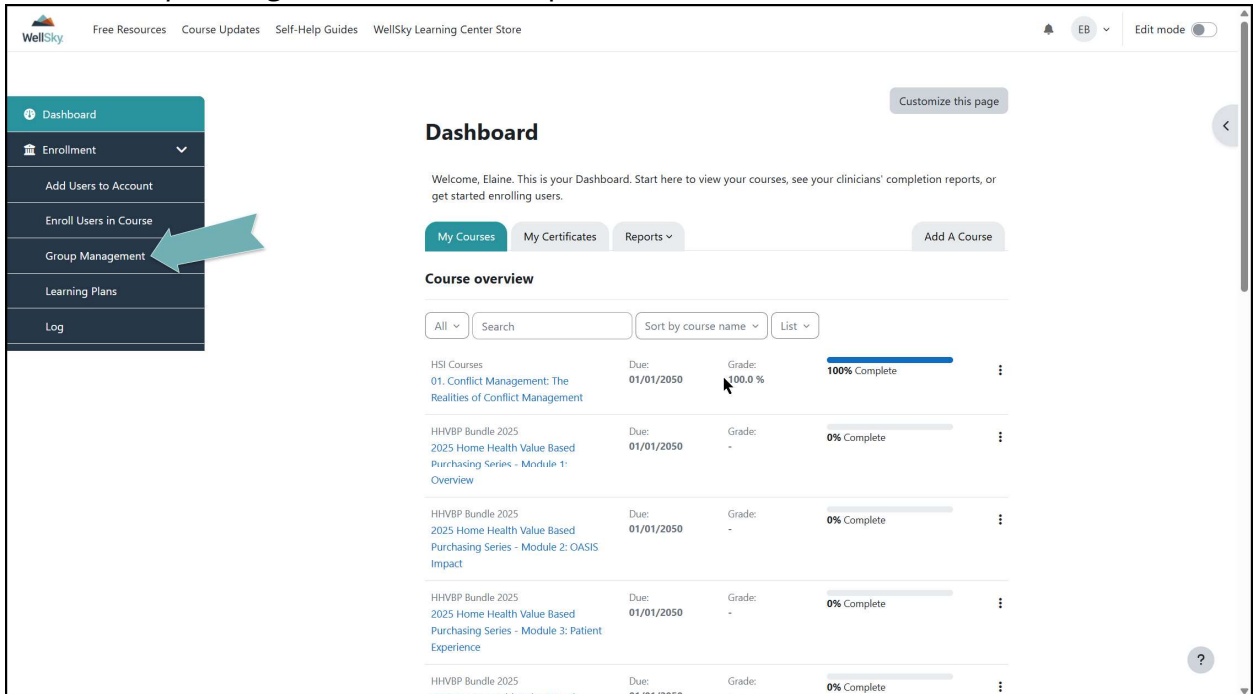
- Users can reside in multiple groups.
- You can also select your User's group during the account creation process.

## Remove Users from a Group

1. Click the *Enrollment* tab from the left-hand admin panel.



2. Select *Group Management* from the dropdown.



# GROUP MANAGEMENT

3. Select the silhouette with a plus sign icon from the right-hand side of the group you would like to manage.

The screenshot displays the 'WellSky Learning Center Group Management' interface. At the top, there are navigation links for 'Free Resources', 'Course Updates', 'Self-Help Guides', and 'WellSky Learning Center Store'. A sidebar on the left contains 'Dashboard' and 'Enrollment' options. The main content area shows a table of groups, all managed by 'SERENITY NOW Home Health and Hospice'. A teal arrow points to the plus icon in the user management icons for the group with ID 7054.

ID	Name	Agency	City	State	Users
6076	Lenexa, KS	SERENITY NOW Home Health and Hospice			7
6248	LKS - Clinical	SERENITY NOW Home Health and Hospice			9
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 - PTs	SERENITY NOW Home Health and Hospice			0
6077	Overland Park, KS	SERENITY NOW Home Health and Hospice			8
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			0
6994	Non-Clinical	SERENITY NOW Home Health and Hospice			0
7054	Registered Nurses	SERENITY NOW Home Health and Hospice			0

4. Select the Users from the *Current Members* list on the left-hand side of your screen.

WellSky Learning Center  
Group Member Assignment  
Registered Nurses

Member type: Member Page Instructions

**Current Members**

- 127569, Test User (testuser127569@testemail.com, Manager)
- 127571, Test User (testuser127571@testemail.com, User)
- 127573, Test User (testuser127573@testemail.com, User)
- 127574, Test User (testuser127574@testemail.com, User)
- 127576, Test User (testuser127576@testemail.com, User)
- 127577, Test User (testuser127577@testemail.com, User)
- 127578, Test User (testuser127578@testemail.com, Manager)
- 127579, Test User (testuser127579@testemail.com, User)
- 127580, Test User (testuser127580@testemail.com, User)
- 127581, Test User (testuser127581@testemail.com, User)

Clear

Finish

**Potential Members**

- 127570, Test User (testuser127570@testemail.com, User)
- 127572, Test User (testuser127572@testemail.com, User)
- 127575, Test User (testuser127575@testemail.com, User)
- 127583, Test User (testuser127583@testemail.com, Manager)
- 130791, Test User (testuser130791@testemail.com, User)
- 130967, Test User (testuser130967@testemail.com, User)
- 131459, Test User (testuser131459@testemail.com, User)
- 131460, Test User (testuser131460@testemail.com, User)
- 131461, Test User (testuser131461@testemail.com, User)
- 131462, Test User (testuser131462@testemail.com, User)
- 131463, Test User (testuser131463@testemail.com, User)
- 131920, Test User (testuser131920@testemail.com, User)
- 132400, Test User (testuser132400@testemail.com, User)
- 132784, Test User (testuser132784@testemail.com, User)
- 133327, Test User (testuser133327@testemail.com, User)
- 133328, Test User (testuser133328@testemail.com, User)
- 133810, Test User (testuser133810@testemail.com, User)
- 133817, Test User (testuser133817@testemail.com, User)
- 146818, Test User (testuser146818@testemail.com, Manager)
- 154632, Test User (testuser154632@testemail.com, User)

Clear

← Add

Remove ►

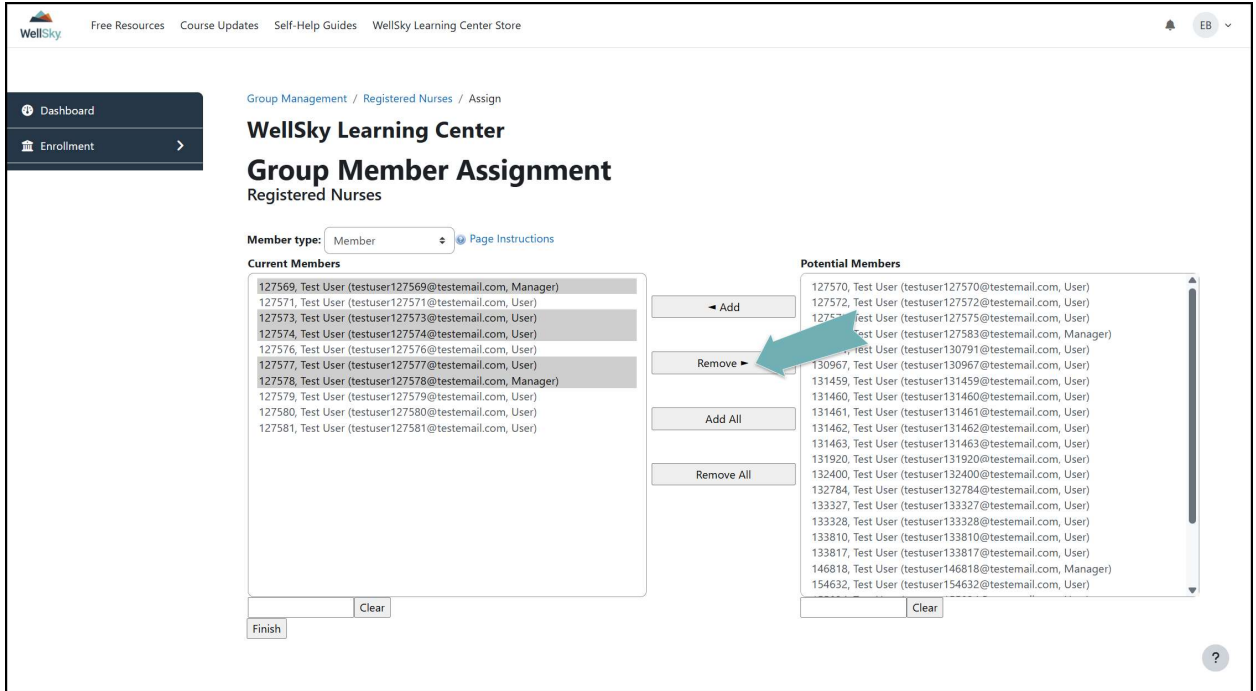
Add All

Remove All

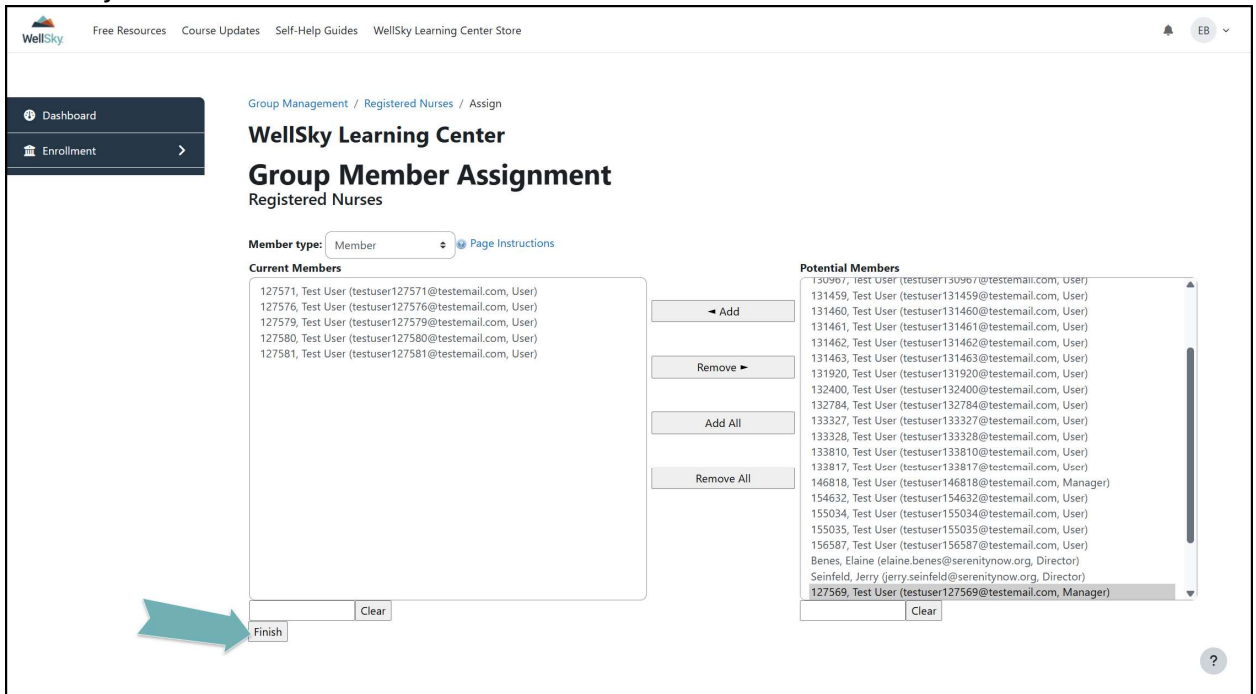


You can multi-select Users from the Potential Members list by holding down the CTRL key while clicking your Users' names.

5. Once all Users have been selected, click *Remove*.

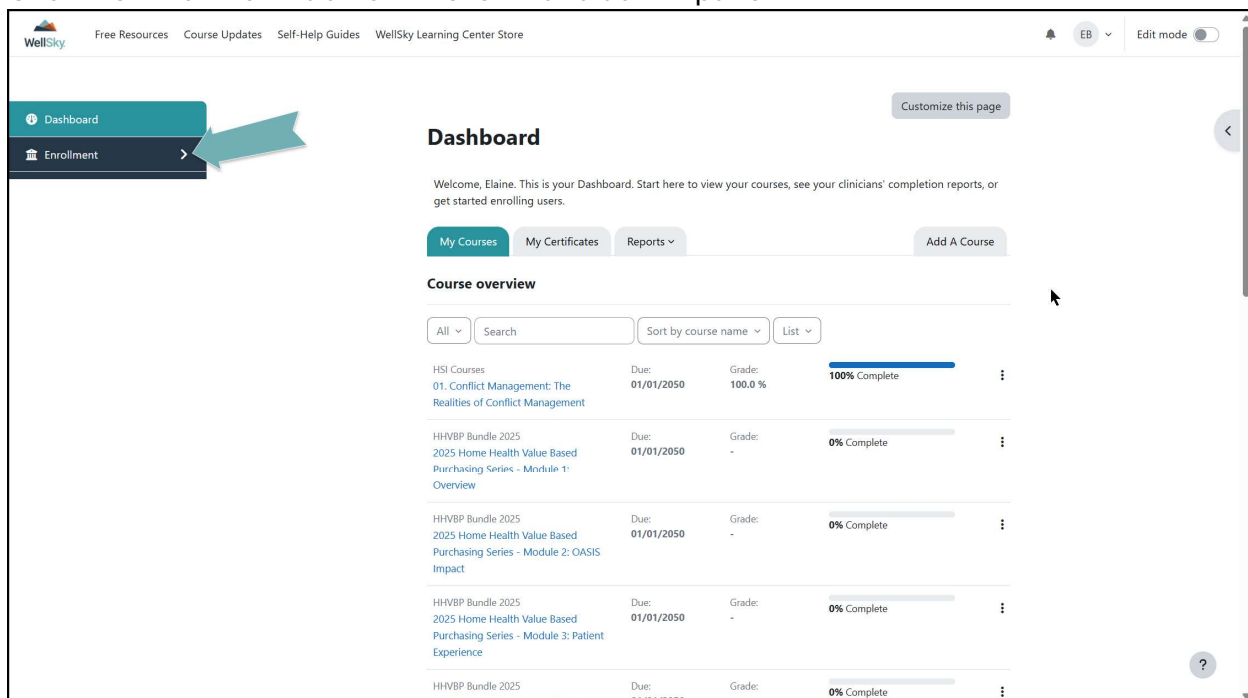


6. Click *Finish* after removing all Users from the *Current Members* list on the left-hand side of your screen.

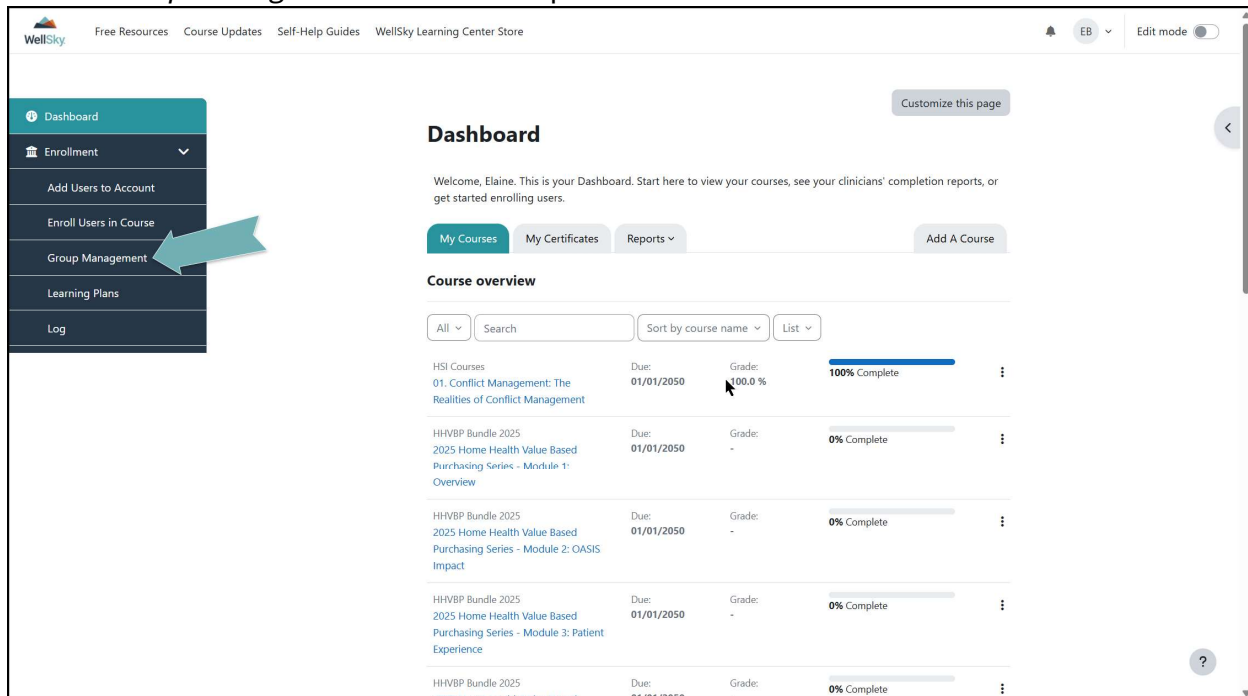


## Delete a Group

1. Click the *Enrollment* tab from the left-hand admin panel.



2. Select *Group Management* from the dropdown.



## GROUP MANAGEMENT

- Click the *Delete* icon next to the existing group that needs to be deleted.

WellSky Learning Center Group Management

ID	Name	Agency	City	State	Users	
6076	Lenexa, KS	SERENITY NOW Home Health and Hospice			7	
6248	LKS - Clinical	SERENITY NOW Home Health and Hospice			9	
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 - PTs	SERENITY NOW Home Health and Hospice			0	
6077	Overland Park, KS	SERENITY NOW Home Health and Hospice			8	
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			0	
6994	Non-Clinical	SERENITY NOW Home Health and Hospice			0	
7054	Registered Nurses	SERENITY NOW Home Health and Hospice			0	

- Click *Continue* to confirm your actions.

WellSky Learning Center Delete

**Confirm**

Group: Registered Nurses

It will delete group and its sub-groups permanently. Do you want to continue?

[Continue](#)



This will **NOT** delete the group's Users.

# GROUP MANAGEMENT

5. The page will refresh and a *Successful* banner will then appear at the top of your screen confirming the group has been deleted.

The screenshot shows the WellSky Learning Center Group Management interface. At the top, there is a navigation bar with links for Free Resources, Course Updates, Self-Help Guides, and WellSky Learning Center Store. A user profile icon labeled 'EB' is in the top right. On the left, a sidebar contains 'Dashboard' and 'Enrollment' options. The main content area displays a breadcrumb 'Group Management / Group Management' and the title 'WellSky Learning Center'. A green 'Successful' banner with a close button is visible. Below the banner is the 'Group Management' section with an 'Add' button. A table lists various groups with columns for ID, Name, Agency, City, State, and Users. Each row includes navigation icons for sorting and actions.

ID	Name	Agency	City	State	Users
6076	Lenexa, KS	SERENITY NOW Home Health and Hospice			7
6248	LKS - Clinical	SERENITY NOW Home Health and Hospice			9
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 - PTs	SERENITY NOW Home Health and Hospice			0
6077	Overland Park, KS	SERENITY NOW Home Health and Hospice			8
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			0
6994	Non-Clinical	SERENITY NOW Home Health and Hospice			0