

REPORTS

As a Client Admin, you have the ability through the WLC to run reports. While Directors and Administrative Staff can run reports for the entire agency, Managers will only be able to run reports on Users that reside within the groups they manage.

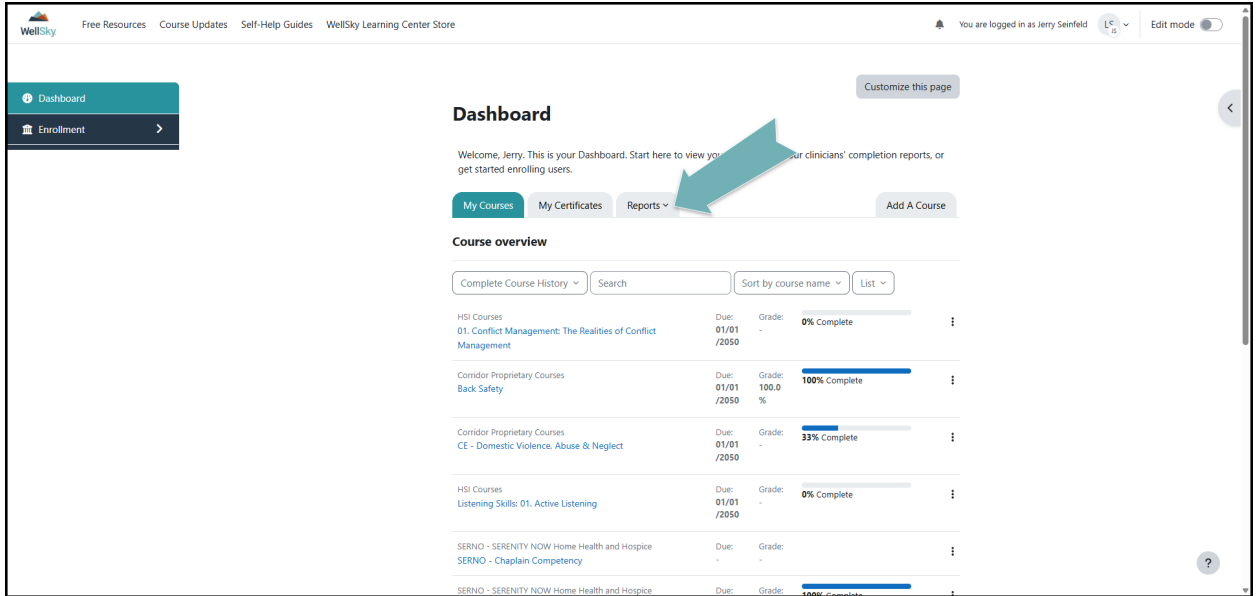
This handout will walk you through:

- Run the [Course Overview Report](#)
- Use the [Log In As](#) feature
- Run the [User Transcript](#) report
- Run the [Course Detail Report](#)

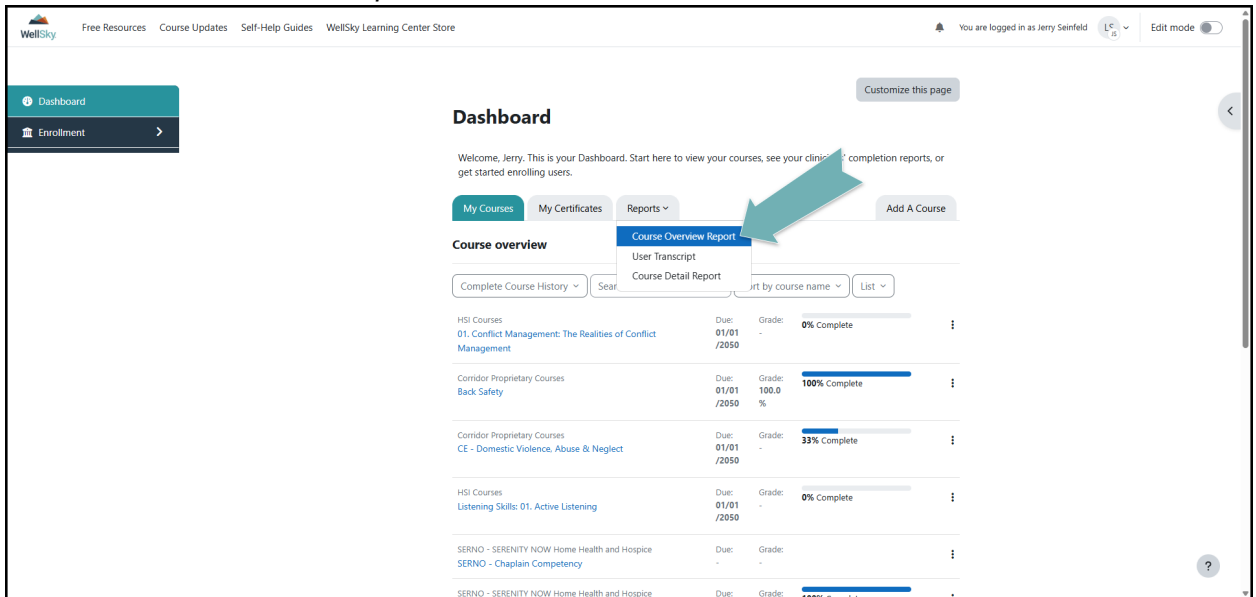
Course Overview Report

This report will show a high-level overview of all enrollments in your agency.

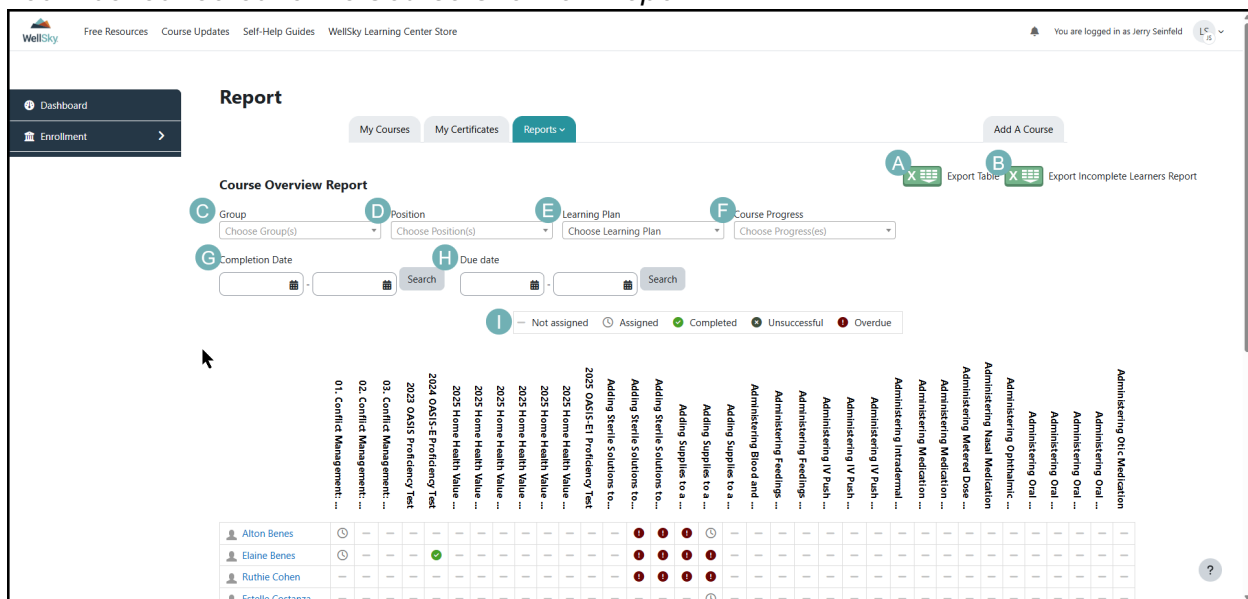
1. Click the *Reports* tab found on your Dashboard.



2. Select *Course Overview Report*.



3. You'll be redirected to the *Course Overview Report*.



- A. **Export Table** – this export option will export the information as you see it on your screen into a downloadable CSV.
- B. **Export Incomplete Learners Report** – will export enrollments for Users where they are assigned but incomplete, not assigned, and overdue into a downloadable CSV.
- C. **Group** – use this multi-select, drop-down filter to select one or multiple groups.
- D. **Position** – use this multi-select, drop-down filter to select one or multiple positions (a.k.a. job titles).
- E. **Learning Plan** – use this drop-down filter to select one of your learning plans.
- F. **Course Progress** – use this multi-select, drop-down filter to select one or multiple completion statuses.
- G. **Completion Date** – use this date range filter to limit your report results to completions achieved during a particular timeframe.
- H. **Due Date** – use this date range filter to limit your report results to enrollments with due dates during a particular timeframe.
- I. **Report Key** – this key provides an explanation of the different statuses you will see on the report results.

4. Filters can be used separately or together to refine your report results.



You can enroll, adjust enrollment due dates, and view progress percentages directly from this report by clicking on the status icons in the report results.

- To enroll, click the *Not Assigned* icon and follow the enrollment steps.
- To adjust enrollment dates, click the *Assigned*, *Unsuccessful*, or *Overdue* icon and follow the steps to adjust due dates. For those in an *Overdue* status, you must first click *Renew* before selecting a new date.
- To view progress percentages, hover over the *Assigned* icon.

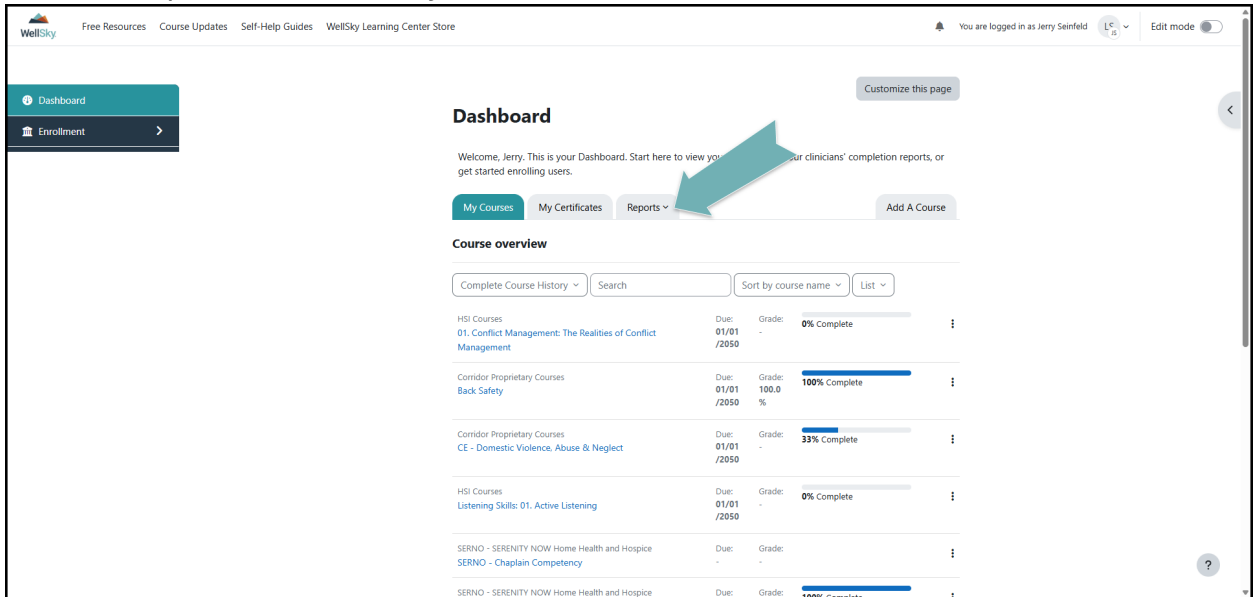


When reviewing these exported results, make sure you look at both the *Percentage* and *Completion Status* columns to determine who is fully complete on an enrollment.

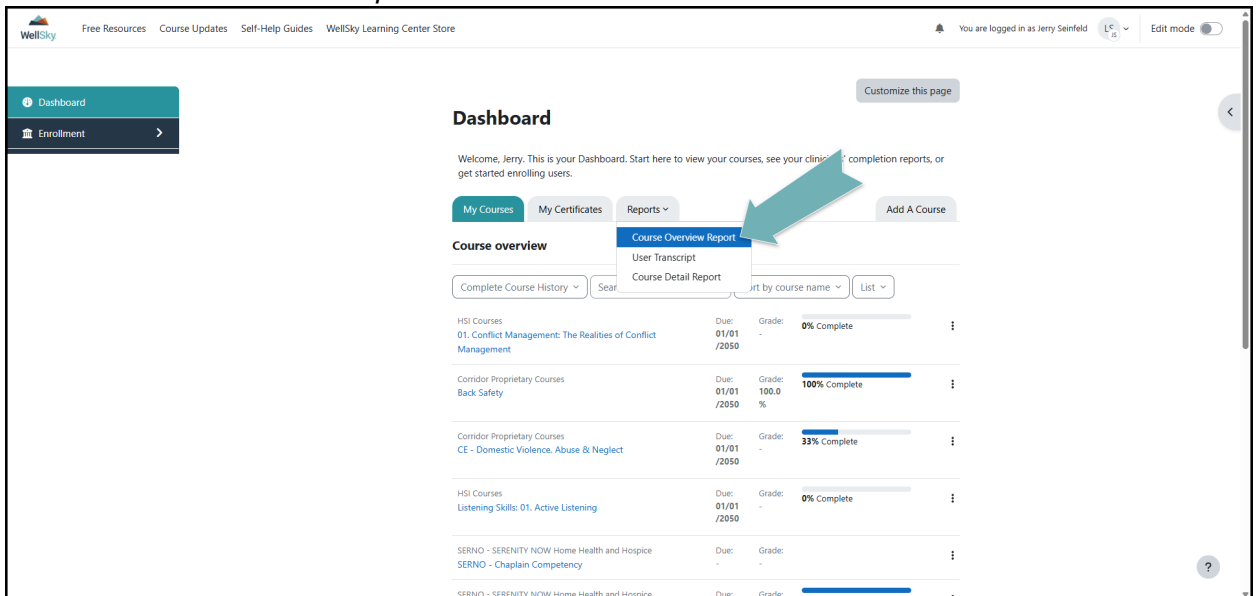
Log In As

This feature gives you the ability to sign into one of your Users accounts for troubleshooting and support purposes.

1. Click the *Reports* tab found on your Dashboard.



2. Select *Course Overview Report*.



REPORTS

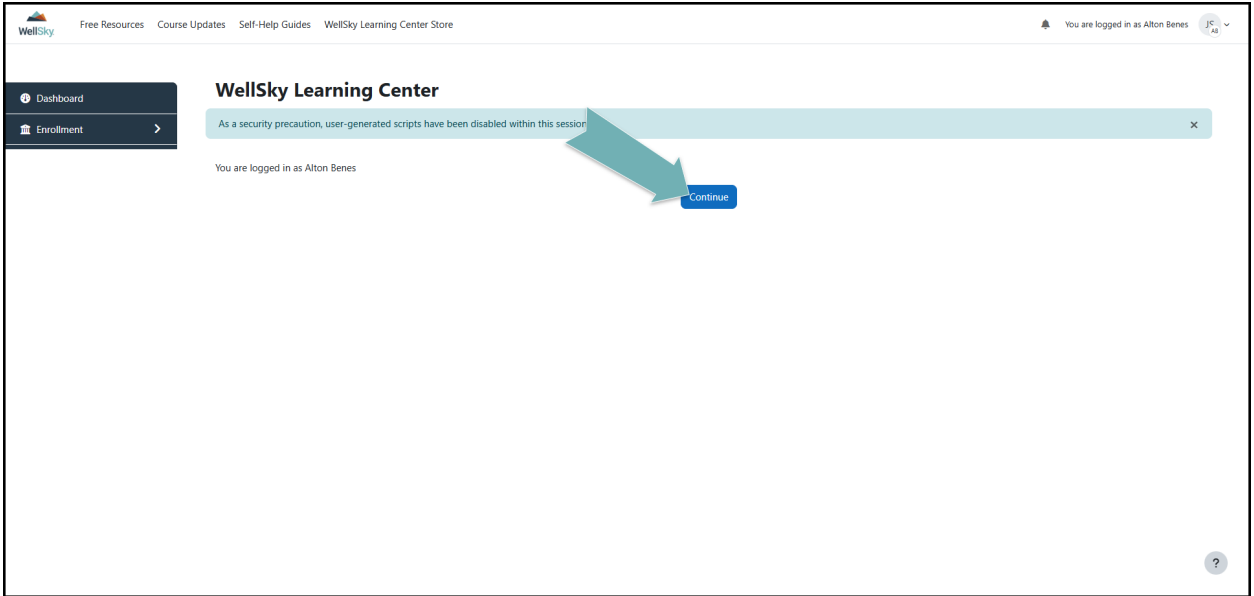
3. Click the name of the User you would like to log in as.

The screenshot shows the 'Report' page in WellSky. At the top, there are navigation links for 'Free Resources', 'Course Updates', 'Self-Help Guides', and 'WellSky Learning Center Store'. Below the navigation is a sidebar with 'Dashboard' and 'Enrollment'. The main content area is titled 'Report' and includes tabs for 'My Courses', 'My Certificates', and 'Reports'. There are also buttons for 'Export Table' and 'Export Incomplete Learners Report'. Below these are filters for 'Group', 'Position', 'Learning Plan', and 'Course Progress'. There are also search boxes for 'Completion Date' and 'Due date'. A legend at the bottom indicates status: 'Not assigned' (grey), 'Assigned' (blue), 'Completed' (green), 'Unsuccessful' (red), and 'Overdue' (red). The main table lists various courses and users. A teal arrow points to the name 'Alton Benes' in the user list.

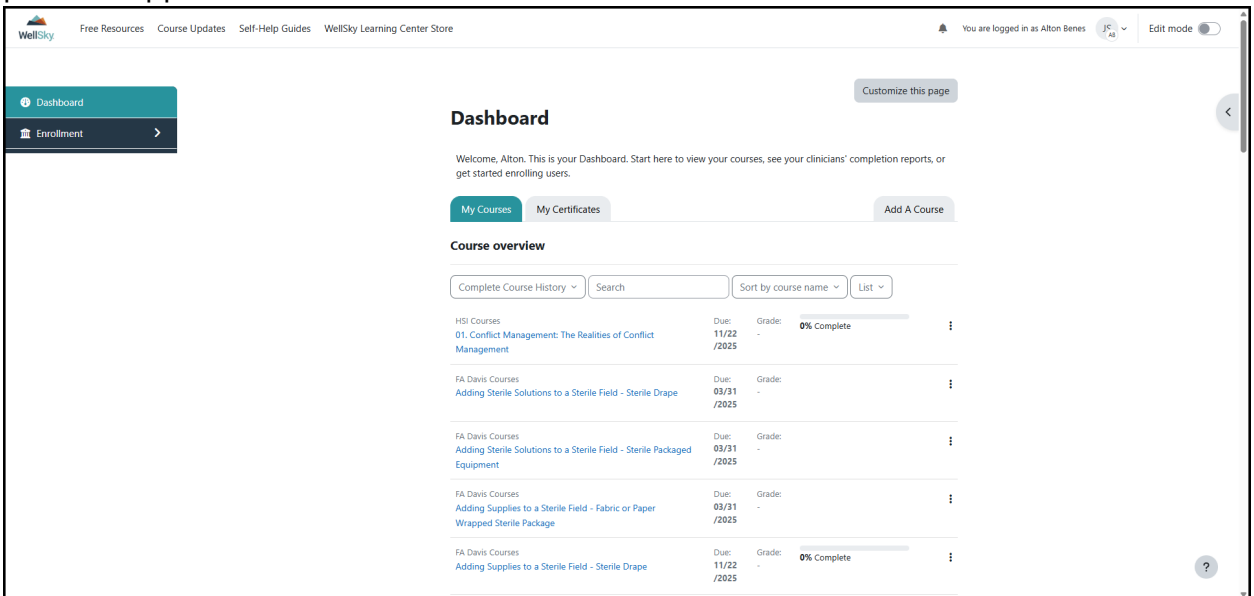
4. You'll be redirected to that User's profile page where you can select *Log In As*.

The screenshot shows the user profile page for 'Alton Benes'. The page title is 'Alton Benes / View profile'. The user's initials 'AB' and name 'Alton Benes' are displayed. There are three main sections: 'User details', 'Course details', and 'Administration'. The 'User details' section includes 'Email address' (alton.benes@serenitynow.org) and 'Timezone' (America/New_York). The 'Course details' section lists 'Course profiles' such as 'SERNO - Example Course 03', 'VNHH - Emergency Operations Plan', 'Hospice COP - Infection Control and Prevention OJTs (Competencies/Checklists)', 'Avoiding Rehospitalizations', and 'Adding Supplies to a Sterile Field - Sterile Drape 01. Conflict Management: The Realities of Conflict Management'. The 'Administration' section includes 'Miscellaneous', 'Forum posts', 'Forum discussions', 'Preferences', and 'Log in as'. A teal arrow points to the 'Log in as' link. The 'Login activity' section shows 'First access to site' and 'Last access to site' with timestamps.

5. Confirm your actions by clicking *Continue*.



6. You have now logged into the User's account and can assist with troubleshooting or provide support.



7. To exit the User's account, you must log out of the WLC entirely.

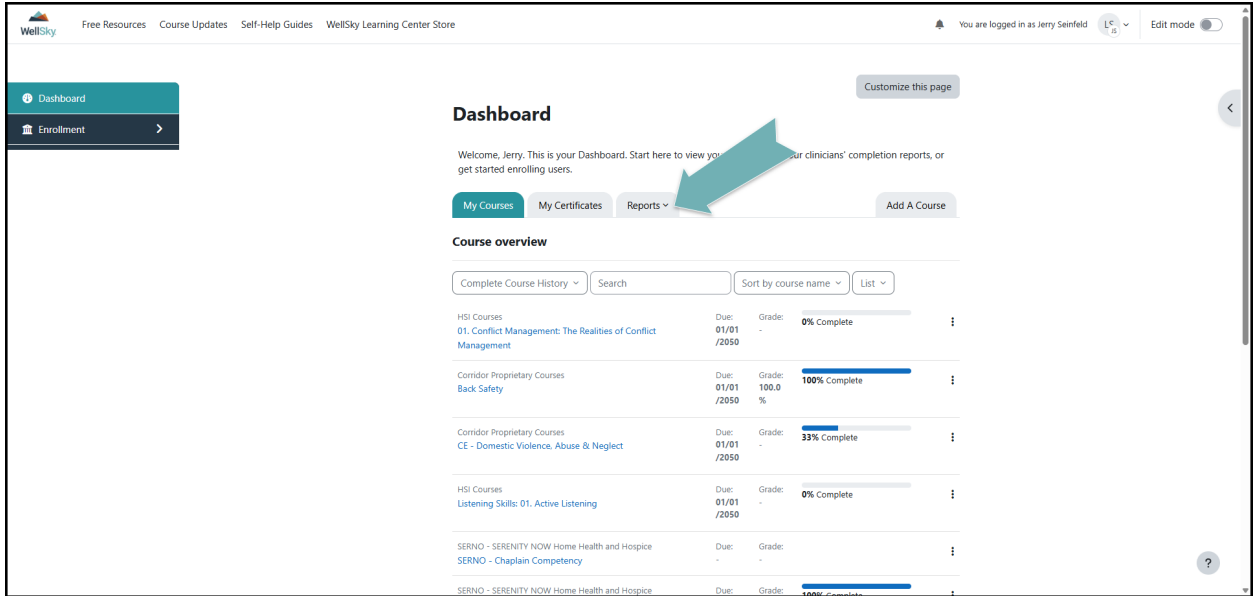
The screenshot shows the WellSky dashboard interface. At the top right, a notification says "You are logged in as Alton Benes" with a user icon and "Edit mode" toggle. A dropdown menu is open, listing "Profile", "Calendar", "Private files", "Reports", "Preferences", and "Log out". A red arrow points to the "Log out" option. The main content area is titled "Dashboard" and includes a "Course overview" section with a table of courses.

Course Name	Due	Grade	Completion
HSI Courses 01_Conflict Management: The Realities of Conflict Management	11/22 /2025	-	0% Complete
FA Davis Courses Adding Sterile Solutions to a Sterile Field - Sterile Drape	03/31 /2025	-	-
FA Davis Courses Adding Sterile Solutions to a Sterile Field - Sterile Packaged Equipment	03/31 /2025	-	-
FA Davis Courses Adding Supplies to a Sterile Field - Fabric or Paper Wrapped Sterile Package	03/31 /2025	-	-
FA Davis Courses Adding Supplies to a Sterile Field - Sterile Drape	11/22 /2025	-	0% Complete

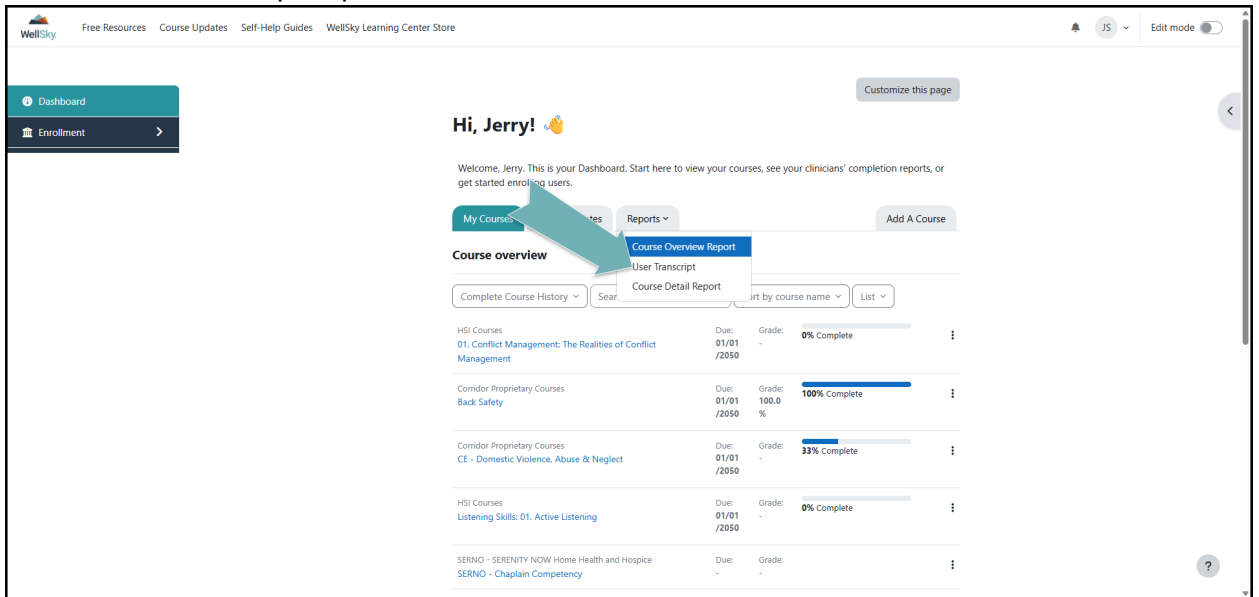
User Transcript Report

This report will show you the enrollments and completions for one specific user.

1. Click the *Reports* tab found on your Dashboard.



2. Select *User Transcript* report.



3. You'll be redirected to the *User Transcript* report.

WellSky Learning Center Report

My Courses My Certificates **Reports** Add A Course

User Transcript

A Group: All Groups B User: Alton Benes

C Select Dates (Due Date): [] [] Search

Learner Information
 Name: Alton Benes
 Email address: alton.benes@serenitynow.org
 Group: Overland Park, KS
 Position: Aide
 Custom 1:
 Custom 2:

Education Provider Information
 WellSky
 https://learning.wellsky.com
 11300 Switzer Road
 Overland Park, KS 66210
 844-993-2994

COURSE	AIDE	ANCC CONTACT HOURS	CA PT CEUS	IACET CEUS	KSBN NURSING CES	TX ADMIN/ALT ADMIN MINUTES	COMPLETION	COMPLIANCE	DUE DATE	DATE COMPLETED	GRADE	REQUIRED/ELECTIVE
01. Conflict Management: The Realities of Conflict Management	-	-	-	-	-	4	Not Started	Not yet due	11/22/2025	Not Started	-	Required
Adding Sterile Solutions to a Sterile Field - Sterile Drape	-	-	-	-	-	1	Not Started	Delinquent	03/31/2025	Not Started	-	Required

- A. **Group** – use this drop-down filter to select one group.
- B. **User** – use this drop-down filter to select your user.
- C. **Select Dates (Due Date)** – use this date range filter to limit your report results to enrollments with due dates during a particular timeframe.

4. Filters can be used separately or together to refine your report results.

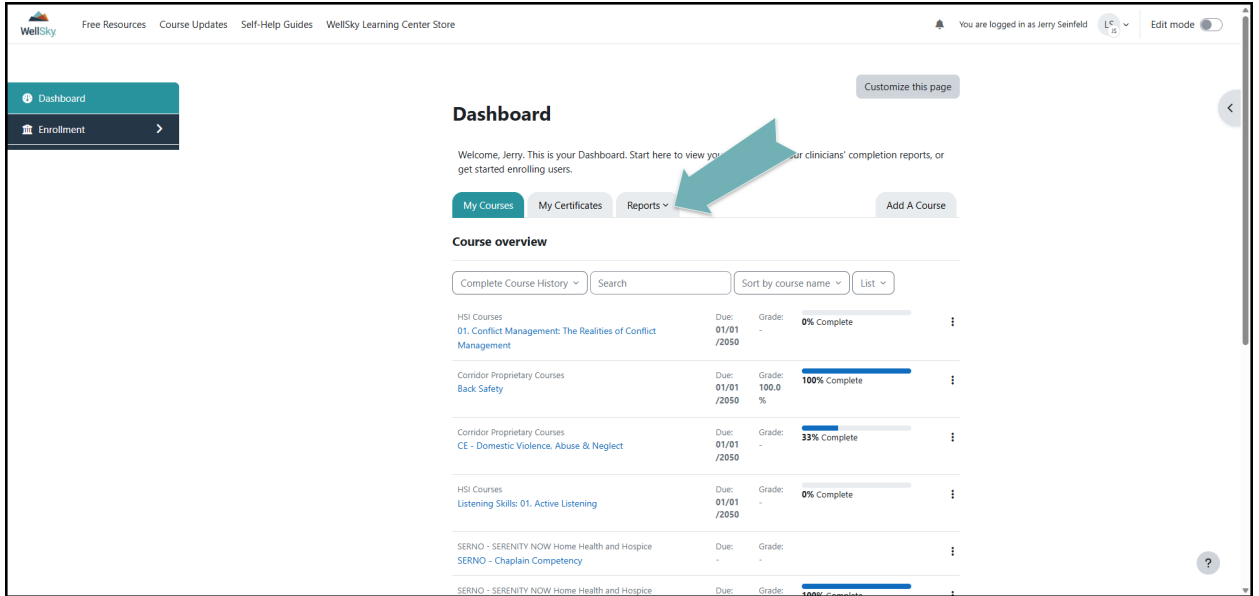


The *User Transcript* export option will export the data you're seeing on your screen.

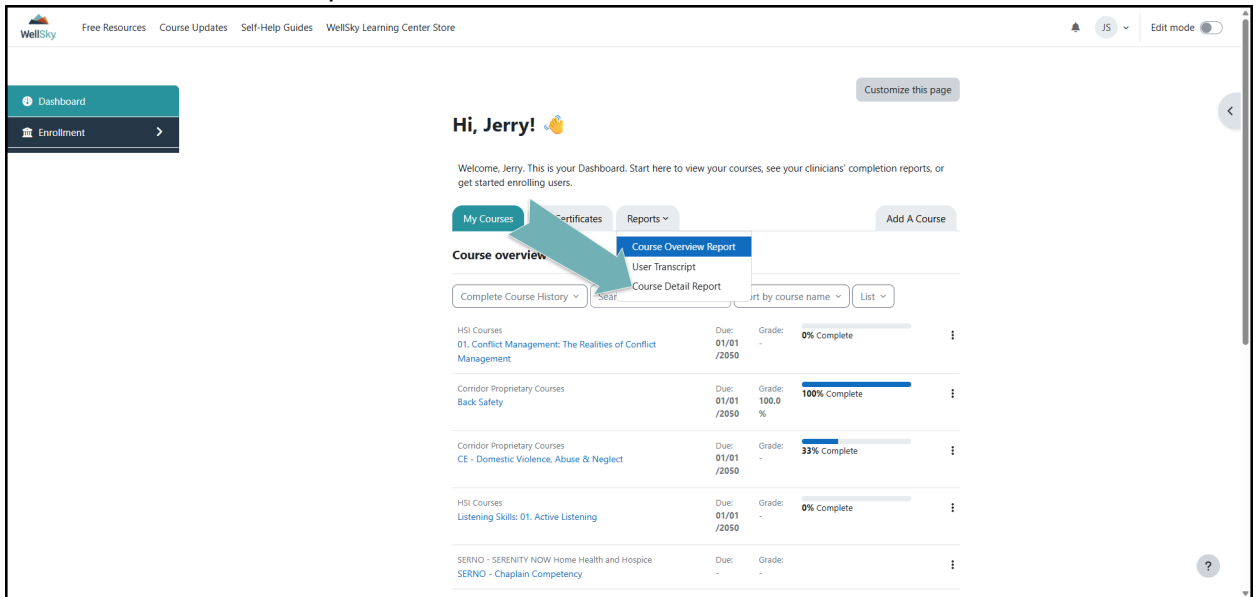
Course Detail Report

This report will show you the detailed completion information for one specific course.

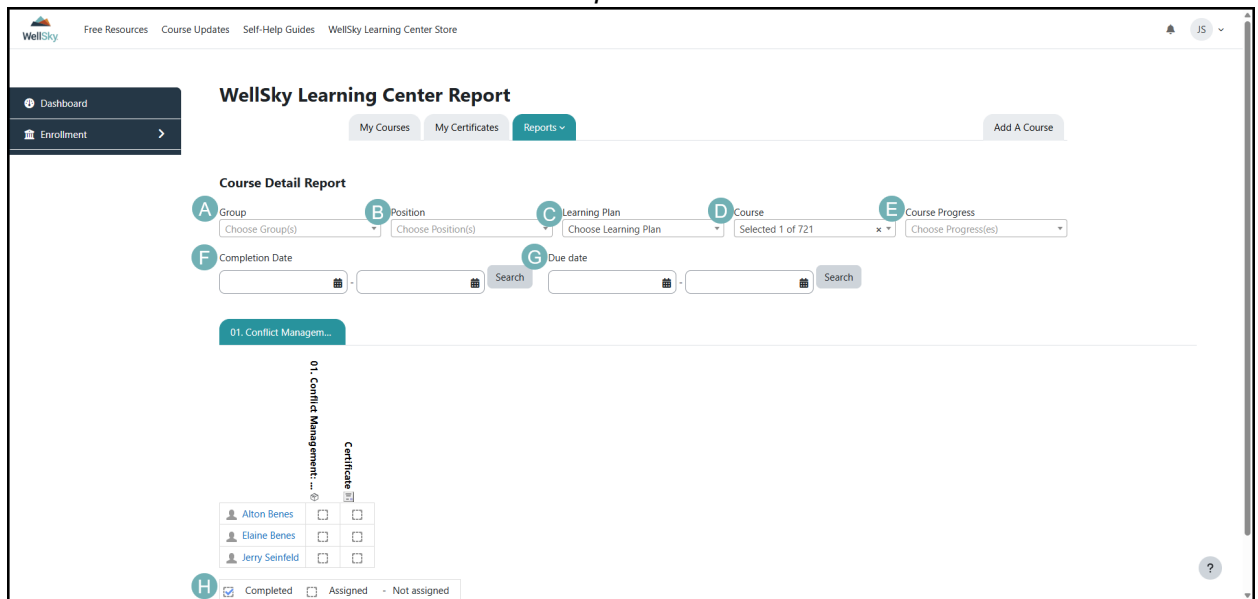
1. Click the *Reports* tab found on your Dashboard.



2. Select *Course Detail Report*.



3. You'll be redirected to the *Course Detail Report*.



- A. **Group** – use this multi-select, drop-down filter to select one or multiple groups.
- B. **Position** – use this multi-select, drop-down filter to select one or multiple positions (a.k.a. job titles).
- C. **Learning Plan** – avoid using this filter as this report is best used on one course at a time.
- D. **Course** – use this drop-down filter to select one course.
- E. **Course Progress** – use this multi-select, drop-down filter to select one or multiple completion statuses.
- F. **Completion Date** – use this date range filter to limit your report results to completions achieved during a particular timeframe.
- G. **Due Date** – use this date range filter to limit your report results to enrollments with due dates during a particular timeframe.
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The *Course Detail Report* export option will export the data you're seeing on your screen.