STAR SERVICES

User Management & Enrollments

Click on an option to jump directly to that section

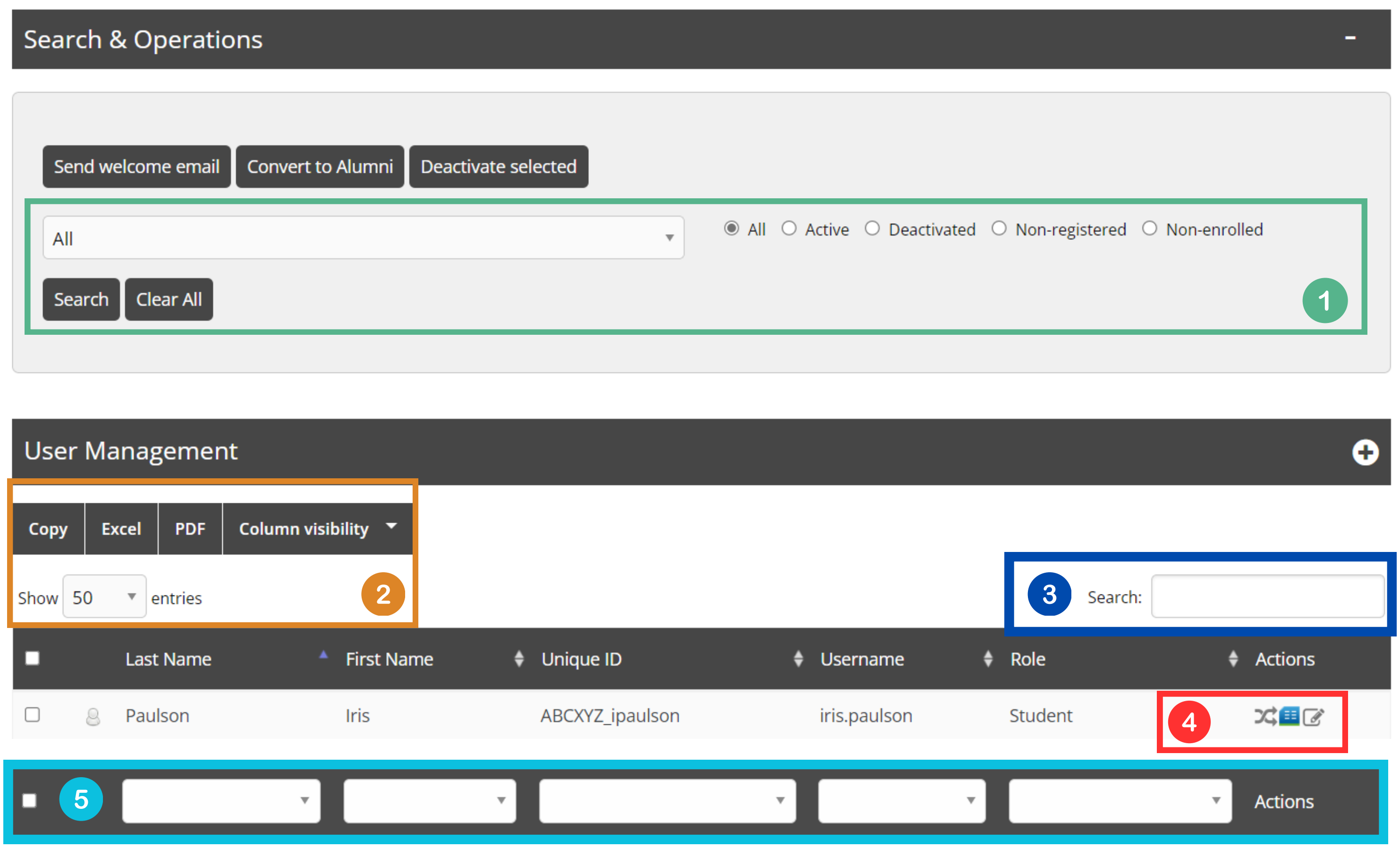
User Management

Enrollments

User Management

User Management

Admin tab ➔ **User Management** ➔ **Users**



1 Allows you to filter by user type using the drop down list and/or status. Use **Clear All** to reset filters

- Non-registered - login credentials not yet set-up
- Non-enrolled - not currently enrolled in active courses

2 Allows you to change which columns are displaying on screen. You can also adjust the number of results on the page and export the list by copying the rows or exporting directly to Excel or PDF.

3 Search by name, email, username, Unique ID, etc.

4 User Actions

- Switch User - allows you to log in as the user. Helpful for a quick check to see if courses have been completed or to assist with troubleshooting
- Courses - see a list of enrolled courses for a user and enroll in additional courses
- Edit - edit the user

5 Filter by the column(at bottom of list) to limit on screen results. Use **Clear All** in 1 to reset

STAR SERVICES

User Management

User Roles

There are several different types of users with varying levels of administrator privileges.

- **Learner/Student**—*Default user type for new users.* May be enrolled into courses. Is not able to edit, manage, or delete. Does not have access to the Admin or Resources tab.
- **Admin/Company Admin**—Can access all functions of the LMS. Admins should have a separate learner account if taking courses. If an Admin is enrolled as a learner in a course, they can no longer access administrator functions within that course following course completion. The "Company Admin" role is a custom user role used to hide unused functions in the LMS for a more streamlined administrator experience. Admins do not count towards active users in your site.
- **Parents/Mentors**—Designed to login and check on their assigned students from a drop down box on their Home Dashboard, revealing the selected student's courses, scores, etc. Parents cannot be enrolled in courses and have limited tools. Learners can be assigned to multiple Parents. Parents need a separate learner account if taking courses. Parents do not count towards active users in your site.
- **Alumni**—Moves user out of the eligible for enrollment lists. If not deactivated, can still access course records but cannot be enrolled in anything new. Alumni do not count towards active users in your site.
- **Faculty**—Instructors for courses. Can also be enrolled as a student. Does not have access to the Admin tab. May create and edit courses in which they are the assigned instructor and manage their own course tools. May clone content from their own courses to make new courses. *Disabled by default.*
- **Staff**—Permissions between an Admin role and a Faculty role. Can be enrolled in courses. When NOT enrolled in a course, this role may view all course tools and content but not add, edit, or delete content. Cannot view gradebook. Has Admin tab with some tools turned off. *Disabled by default.*
- **Customer User Roles/Types**—Custom User Roles can be created within the LMS. If you'd like to create custom administrator privileges or roles, please contact the Training Help Desk.

User Training Settings

Admin tab → **User Management** → **User Training Settings**

These are settings to tag your users for bulk enrollments, custom learning paths, and report filtering. Each user can be assigned to **ONE OF EACH** of the following: Job Title, Cost Center, and Site.

STAR recommends tagging users based on differences in their training requirements. For example: Job Titles such as Direct Care/Manager/Administrative as opposed to their "HR" job title. For smaller organizations, a single Cost Center for all staff will allow you to do company-wide bulk enrollments. Larger companies may choose to split users into multiple Cost Centers based on service type. For efficient bulk enrollments, use the fewest options that are practical for your organization.

Only users being enrolled in courses (not Admins or Parents) should be assigned User Training Settings. User Training Settings can be set-up manually or will be created automatically if importing users. See **Enrolling via User Training Settings** for more information.

User Management

Adding New Users

Admin tab → **User Management** → **Users**

Click the **PLUS SIGN** on the right side of the User Management bar to add a new user and fill out the appropriate fields for your organization. These are the required/commonly used fields.

USER ROLE	***REQUIRED.*** Default is "Learner". Select the User Role for the new user
SUPERVISOR	*Optional.* Select the learner's supervisor or the primary "Parent" to associate with the user. Note: With a small setting change, you can allow supervisors to run reports on their associated direct reports without setting up secondary Parent accounts. See **Supervisors & Parents** for more information.
USER ID	***REQUIRED.*** This ID becomes their locator within the LMS. It can be anything, but it must be unique. For example: employee number, firstname.lastname, etc.
FIRST & LAST NAME	***REQUIRED.***
EMAIL	***REQUIRED.*** It is highly recommended, but not required, that each email address be unique to enable self-service password resets, messaging, and welcome and reminder emails. If not using a unique email, you must pre-assign a username/password and provide it to the user. If copying and pasting, ensure there are not spaces at the beginning or end of the email address.
COMPANY	*Optional.* This field is used solely for adding a company name on certificates of completion.
USERNAME & PASSWORD	*Optional.* Manually assign a username/password (you will need to provide the credentials to the learner) OR leave these fields blank if sending a Welcome Email. See **Welcome Emails** for more information. For more information on passwords, see the **Customizing the LMS** guide.
JOB TITLE*, COST CENTER, SITE	*Optional.* Each user can be assigned to ONE job title, ONE cost center, and ONE site. These fields can be used to create learning paths, process bulk enrollments, and filtering training records. These fields should only be used for the Learner/Student role. **YOU MUST ASSIGN THESE FIELDS TO PROCESS BULK ENROLLMENTS.** See **Enrolling via User Training Settings** for more information.
HIRE DATE	*Optional.* This field is can be used as a report filter as well as display on reports.
USER DEFINED FIELDS*	*Optional.*

All other fields are optional. After completing the user information, scroll to the bottom and **Save**.

Timesaving Tip: If you are in any field you can type in, you can also press enter to save the record.

STAR SERVICES

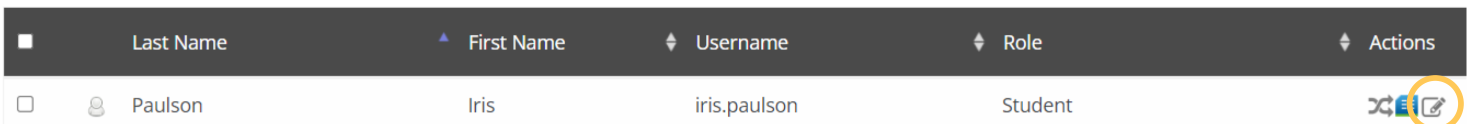
User Management

Adding New Users Continued

Admin tab ➞ **User Management** ➞ **Users**

New Hire Job Titles

If you are processing enrollments via a New Hire Job Title, once the user has been saved/created, edit the user and change to their "permanent" job title to be used for subsequent bulk enrollments like annual training. See **Enrolling via User Training Settings** for more information

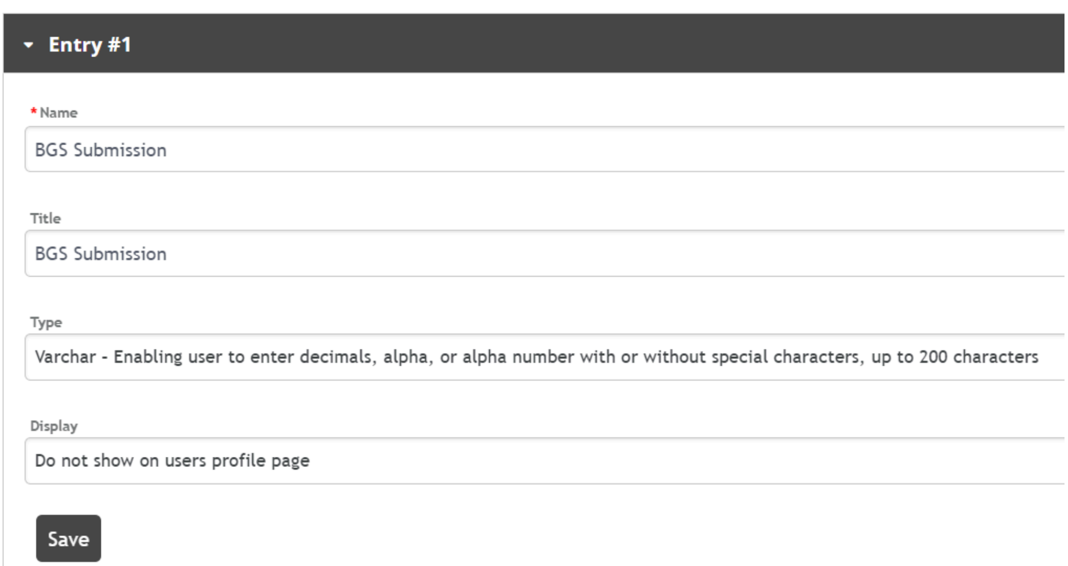


User Defined Fields

Admin tab ➞ **User Management** ➞ **User Defined Fields**

You can add up to ten custom fields specific to your organization. Frequently used custom fields include *BGS Submission*, *BGS Clearance*, First *Supervised Direct Contact*, and *First Unsupervised Direct Contact*. Custom fields can be displayed on reporting.

Click the **PLUS SIGN** to add new fields. Enter the number of fields you wish to add.



Then set the parameters for each field and **Save**

Note: Use the same verbiage for Name/Title

User Management

Supervisors & Parent Accounts

Admin tab ➞ **User Management** ➞ **Users**

Associating a user with a supervisor or Parent* allows for a supervisor to view information about "their" staff.

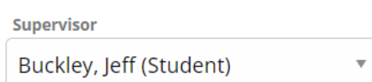
When setting up a new user, you can associate another student in the system as a supervisor OR create separate Parent accounts.

This chart shows the difference in features between the two options.

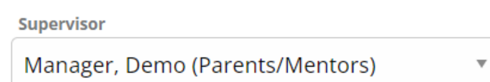
To associate a supervisor with a user, you select the appropriate user from the drop down in the student edit screen.

If using Parent accounts, you need to set up the Parent before associating with the Student user.

Feature	Supervisor	Parent*
Access Limited to Specific Staff	✅	✅
Training Reports	✅	✅
Admin-Style Transcript Filters**	✅	⛔
Requires Separate User Account	⛔	✅
Certificate Access	⛔	✅
Student View	⛔	✅
Students can be associated with more than one supervisor/parent	⛔	✅



OR



Unlike Supervisors, more than one Parent can be assigned to a user. Go to **Admin tab—› User Management —› Multiple Parents to Student** and select the user from the dropdown list to associate multiple Parents.

For detailed information on using a Parent account, see the **Using Your Parent Account** guide.

Supervisors can view reports from **Home —› Reports —› Offline Reportings**

*Parent accounts are not enabled by default in all sites. Contact the Help Desk to have Parent accounts enabled. Once enabled, Parents are set up via the same process as any other user type.

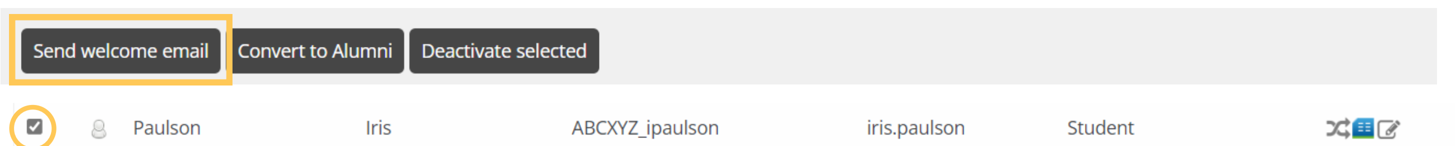
To turn on Admin-style transcript filters for supervisors, go to **Admin tab —› Config & Settings —› General Settings —› Training Options and toggle on *"Allow Students with Direct Reports to View Filters in Offline Reports"*

User Management

Welcome Emails

Admin tab → **User Management** → **Users**

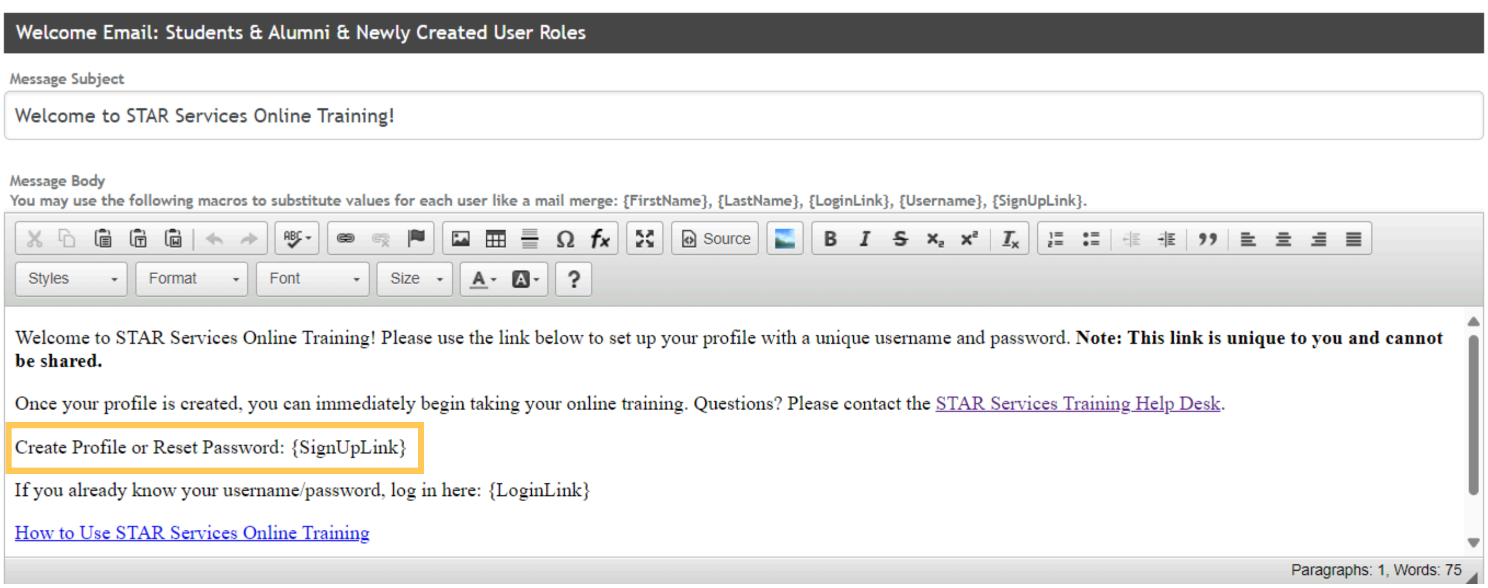
Users can either be assigned a username and password at the time of set-up or sent a welcome email. To send a welcome email, from the User Management screen, mark the box next to the applicable user(s) and click the "**Send Welcome Email**" button. This will generate an email to the address on file and prompt the user to create their own username and password. These links are unique to each recipient and must not be shared. Welcome emails can also be sent automatically when importing users. Note: If a username/password is pre-assigned, login credentials need to be communicated directly to the user. A welcome email will not provide them. Welcome emails can also be used to prompt a password reset if indicated in the welcome email text (see below).



Editing Welcome Email Text

Admin tab → **Config & Settings** → **Application Settings** → **Email Settings**

Welcome Email text can be customized by user type. Password resets can also be initiated by using the {SignUpLink} macro in a welcome email sent to existing users. You may need to adjust the Welcome Email text to reflect password resets. Be sure to save after editing.



User Management

Password Resets

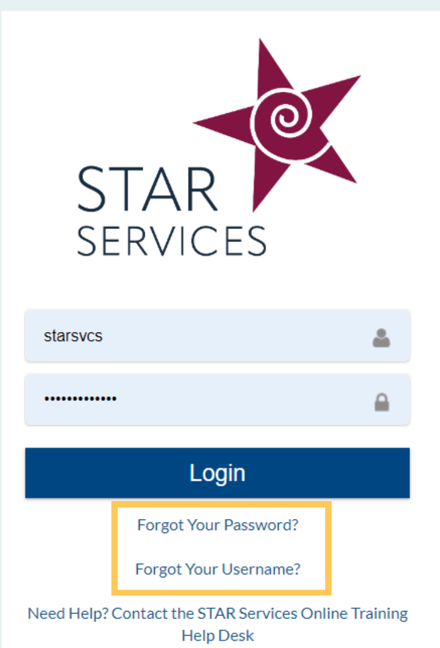
Admin tab → **User Management** → **Users**

To manually reset a password, edit the user by clicking the edit button in the Actions column

		Last Name	First Name	Username	Role	Actions
☐		Paulson	Iris	iris.paulson	Student	

Then overwrite the contents of the Password and/or Username field(s) and save. **You will need to communicate the new password and/or Username to the user**

Welcome emails can also be used to prompt a password reset if indicated in the welcome email text. See **Welcome Emails** for more information



Self-Service Password Resets

Users can facilitate password resets and look up their username from the login page

Note: If unique emails were not used for users, these self-service options would send to the first user (alphabetically) associated with the email address

User Management

Deactivating Users/Converting to Alumni

Admin tab ➞ **User Management** ➞ **Users**

Deactivating a user locks them out of out of the LMS. Converting to alumni removes them from the roster of users eligible for enrollment. If users are deactivated but not converted to alumni, enrolling the deactivated user into a course—manually or through User Training Settings—will re-activate that user. This is intentional as some providers have seasonal employees. Former employees should be converted to alumni. You can still run reports on deactivated user/alumni. If the alumni user type is left to active, the user is still able to access the LMS to view grades although they are unable to take courses.

Please do not deactivate the STAR Services and Edvance360 admin accounts:

- **STAR Services**
- **Ketty Huggins/Torrey**
- **E360 Admin**
- **Nicole Ditoro**

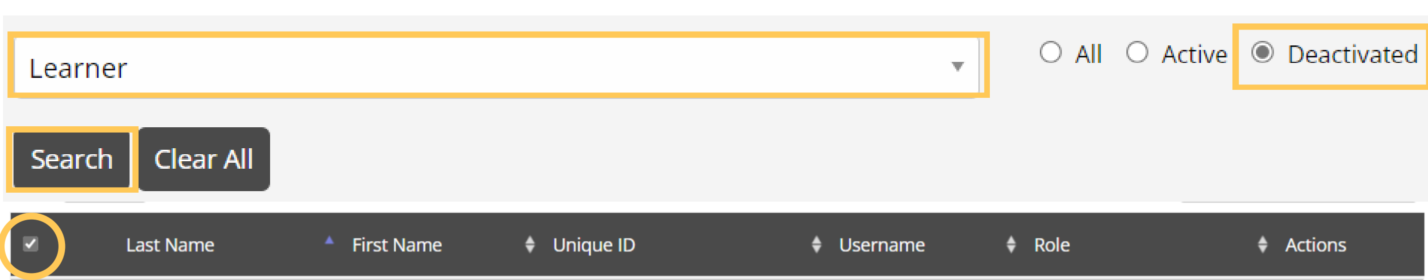
To deactivate one or more users:

- Click the checkbox(es) next to the user(s) to be deactivated
- Click the **"Deactivate Selected"** button

To convert to alumni:

- Click the checkbox(es) next to the user(s) to be converted
- Click the **"Convert to Alumni"** button

Timesaving Tip: If converting a group of staff at once, after deactivating, use the filters to search for just deactivated learners (or users if deactivating multiple user types) and select all, then click the **"Convert to Alumni"** button



STAR SERVICES

User Management

Importing/Exporting Users

Admin tab ➞ Courses & Communities ➞ Import/Export

If you need to set up or change details for numerous users, the Import/Export feature allows you to do so via spreadsheet instead of manually editing or adding students.

Import / Export

Section	Import	Export	Sample (CSV)
Users	1 Import	2 Export	3 Sample

1. Import updated/finalized CSV file into the LMS
2. Export a list of all users (active and inactive) in the LMS
3. Download a sample import document with all of columns in place to import NEW users only

If you are editing existing users, export a list first. If you're adding new users only, use the sample file.

IMPORTANT INFORMATION ABOUT THE IMPORT PROCESS:

- Please do not edit or remove any existing Edvance360 or STAR Services users. You can delete the rows for users you don't need to edit or, if you don't make any changes, they won't be updated upon import.
- If you are using the import to edit existing students, you cannot change the ID (Column A) via import. It will create a new user. User IDs must be changed by manually editing the user in the LMS.
- Required fields are the User ID, First Name, Last Name, Email, User Type, and Active. All other fields are optional. If you are editing an existing user, leaving the password field blank will preserve their existing password. For new users, you can either preassign the username/password or send a welcome email during the import process, if they have a unique email address. Any custom fields will be the final columns in the import document. Custom fields must be set up prior to importing and are visible in the sample file.
- If you are assigning Job Titles, Sites, and Cost Centers via import, new settings will be created automatically when imported. Be sure to match existing User Training Settings when applicable.
- If you are using the Supervisors column, you need to use the User ID (the unique identifier in Column A) for the Learner, Admin, or Parent user who is the supervisor. You cannot type a name.
- User types for all Learners is "Student". For inactive staff, use the User Type "Alumni". See **Deactivating Users/Converting to Alumni** for more information about deactivating former staff.
- In the Active column, a "1" denotes an active user, "0" is an inactive user, "D" will delete the user.
  - While you cannot delete staff in the LMS, you can delete via import.
  - **NOTE: If you delete a user, all training records with that user are also deleted. Delete should ONLY be used if the user has no associated records. Otherwise, deactivate and convert to alumni.**

When you're done editing, save with the file type CSV (Comma Separated Values). Click on Import in the LMS and select the file. You'll also have the option of whether or not to send welcome emails as part of the import process. After importing, a list of all imported users will display. Verify there are no errors in the Details column:

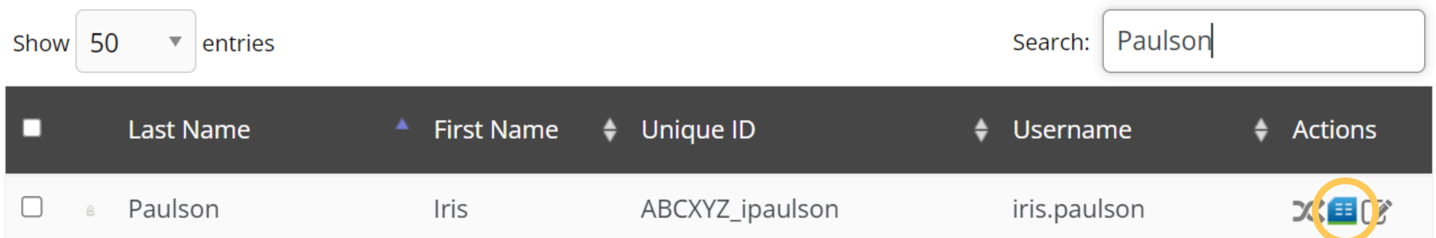
Row	User Id	Status	Details
2	starsvcs	Updated	Success No Email Sent.

Enrollments

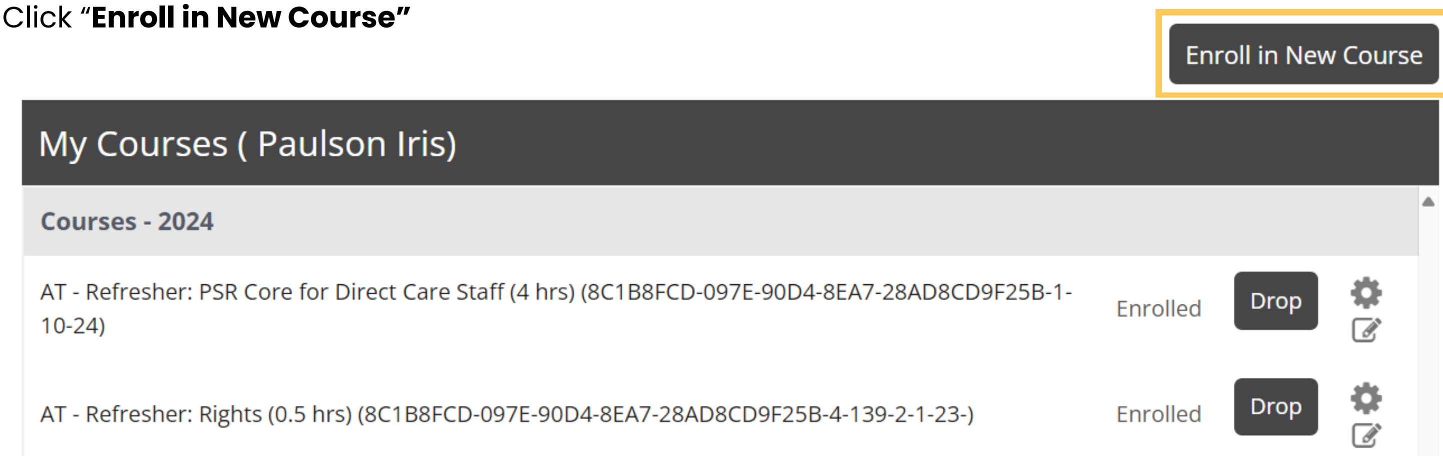
Enrolling by User

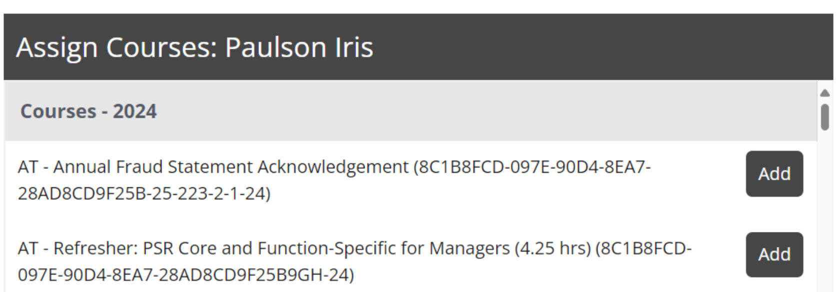
Admin tab → **User Management** → **Users**

1. Search for the user to be enrolled and click on the Courses button in the Actions column



2. This will open My Courses for the student and display a list of currently enrolled courses. Click "**Enroll in New Course"**





3. Click the **Add** button for courses in which you wish to enroll the user and close the pop up window when done

NOTE: As users may be enrolled in advance of the course being available (See **Course Start/End Dates**), staff do not get an email notification of enrollment. We recommend notifying staff directly or sending a message via the LMS. If Reminder Emails (Agents) are enabled for a course, staff will get notified of incomplete training. See the **Course Management** guide for more information.

WARNING: The student's My Courses list has a drop button for each course. Dropping a course from a user's enrollments will drop associated training records. Drop should only be used in cases of mistaken enrollments. If you accidentally drop a user, enrolling them in the course again will restore the record including any progress within the course.

Enrolling via User Training Settings

Admin tab → **User Management** → **Users Training Settings**

User Training Settings can be used for bulk enrollments or to create learning paths. They are also available as filters on reports.

Can I create a learning path for annual training? Yes, although it's not recommended. You can add start and end dates to annual trainings to have them unlock through the year. See **Course Start/End Dates** for more information. However, as staff may not finish their trainings by the due date and the course will expire, you would then need to manually extend the due date which becomes a management task for administrators. You cannot simply omit the due date on a course or you will have new hires automatically enrolling in annual training that occurred prior to their hire date.

STAR recommends processing annual training as a bulk enrollment for the specific training month. You may still want to put a start date on the training so you can process enrollments a few days in advance. For example, your annual training for May is *Refresher: Data Privacy*, but the 1st of May is a Saturday. You can add a start date to the training of May 1st so that if you process the bulk enrollment on April 27, it won't be visible to staff until May 1st. Even though you're manually processing the bulk enrollment, it's more efficient than extending expiration dates for students.

Do staff get notified upon enrollment? No. As users may be enrolled in advance for a course with a start date, staff do not get an email notification of enrollment. We recommend notifying staff directly or sending a message via the LMS. If Reminder Emails (Agents) are enabled for a course, staff will get notified of incomplete training. See *Reminder Emails* in the **Course Management** guide for more information.

What if we do annual training based on hire date? We understand moving from using hire date for annual training to using a control month for all staff can be a major change. While we recommend control months as the easiest option to maintain compliance, consider using Sites or Job Titles to tag staff with their annual month based on hire date. For example: Sites or Job Titles called 01 - DSP Annual, 01 Manager Annual, 02 - DSP Annual, 02 - Manager Annual etc. to allow for bulk enrollments while still assigning based on hire date but without running a report to see who is due for training.

New Hire Job Titles

STAR recommends creating "New Hire" Job Titles to create learning paths for new hire enrollments. Create this setting, and select all the courses a new hire would be enrolled in. Upon user setup, apply this setting to a new hire and click Save, and that user will automatically be enrolled in all of the pre-selected courses. After creating the user, immediately edit and change the user's Job Title to reflect their "permanent" Job Title setting. The new hire enrollments will remain. You can create multiple New Hire job titles. For example, New Hire - DSP, New Hire - Manager, New Hire - DSP In-Home

Timesaving Tip: Put an * before the New Hire job title to make them easy to find when setting up a new user

STAR SERVICES

Enrollments

Enrolling via User Training Settings

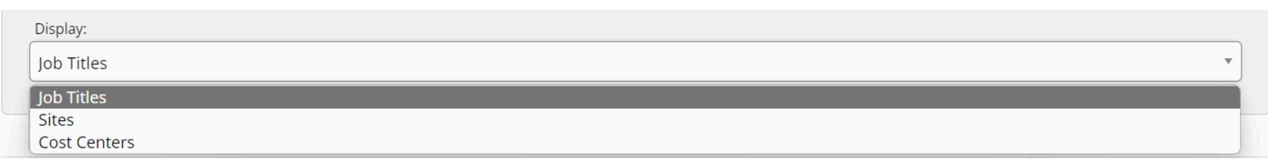
Admin tab → **User Management** → **Users Training Settings**

Bulk Enrollments

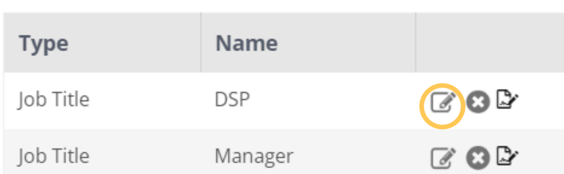
CAUTION: If you have not assigned User Training Settings to users, they will not be included in the bulk enrollment.

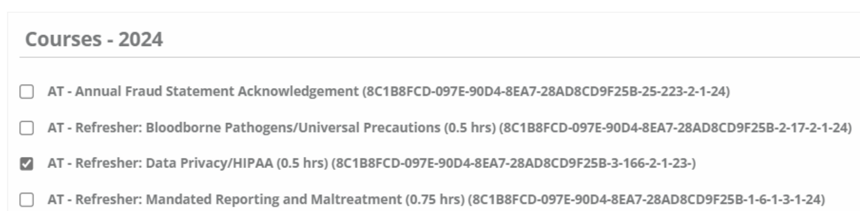
Timesaving Tip: If using the recommended structure User Training Settings, with regards to STAR's annual training courses, the only difference in training requirements for supervisors and direct care staff is with the Positive Supports Rule. Direct Care staff need *Refresher: PSR Core for Direct Care Staff*. Managers need *Refresher: PSR Core and Function-Specific for Managers*. For these courses, you'll need to bulk enroll by job title as the requirement is different. For other STAR annual trainings, staff typically would receive the same training regardless of job title and you can use the Cost Center for the bulk enrollment.

1. Use the Display dropdown box to choose which User Training Settings to display.

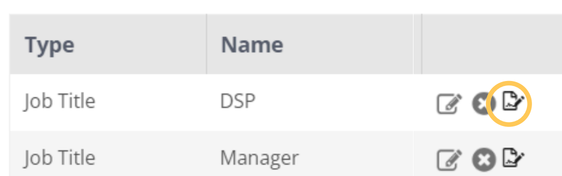


2. Edit the User Training Setting for which you would like to enroll and check the course(s) to assign and **Save**.





3. Click the Enroll button associated with the selected User Training Setting. The page will refresh and you'll receive a "**User Enrolled Successfully**" message



4. **IMPORTANT:** After enrolling, edit the User Training Setting again and **UNSELECT** the courses and **Save**. If you do not unselect the courses, it becomes a learning path and new users assigned to those User Training Settings will be automatically enrolled in the selected courses.

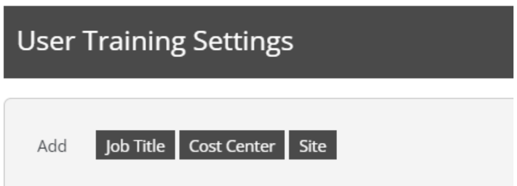
Timesaving Tip: The **Enroll Current Users** button at the top of the User Training Settings page will process enrollments for ALL User Training Settings at once without having to click the enrollment button for each setting.

Enrollments

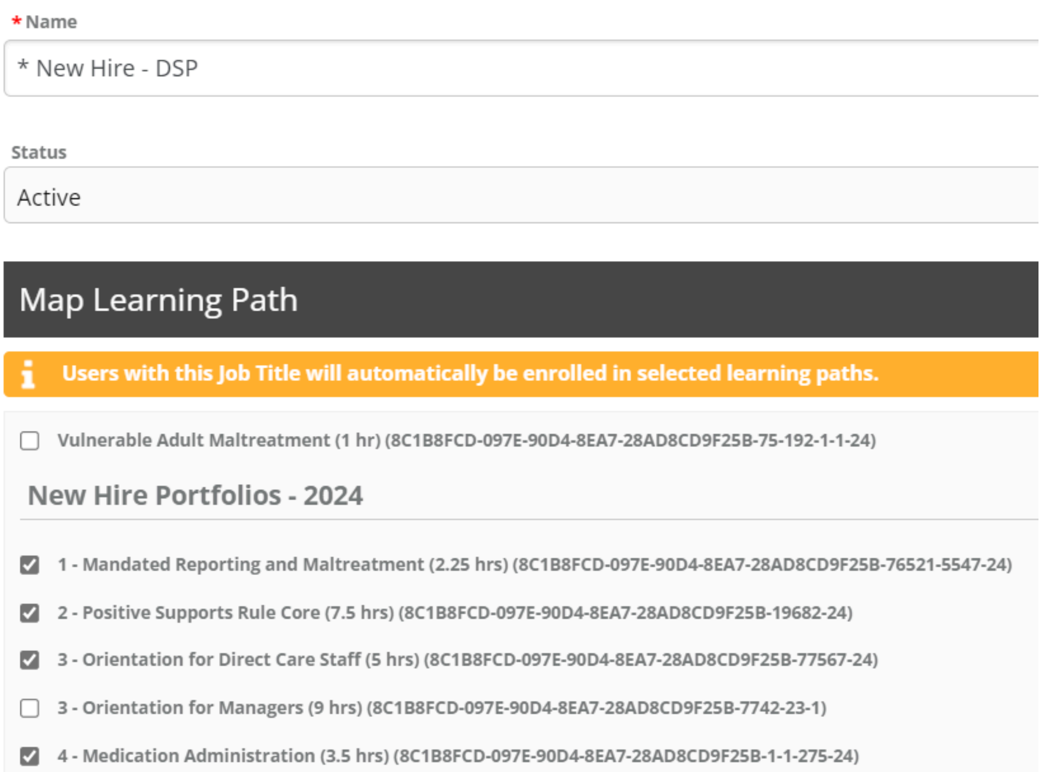
Enrolling via User Training Settings

Admin tab ➞ **User Management** ➞ **Users Training Settings**

Adding New User Training Settings



1. To add a new User Training Setting, click the button for the type you'd like to add.



2. Name the Setting

3. If creating a learning path, select the courses you want as part of the learning path.

   If the setting will be used for bulk enrollments in the future, do not pre-select courses.

4. Click **Save**

Editing User Training Settings

Type	Name	
Job Title	DSP	
Job Title	Manager	

To edit an existing learning path, click the **Edit** button for the User Training Setting. Unselect the courses you no longer want included and select any new courses you want included and click **Save**.

This will **NOT** undo any existing enrollments but subsequent enrollments via the learning path will reflect the new selections.

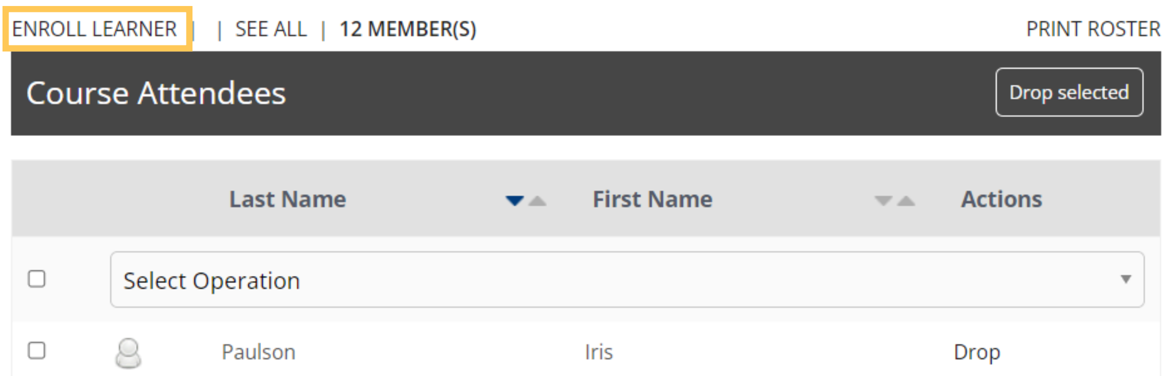
Enrollments

Enrolling by Course

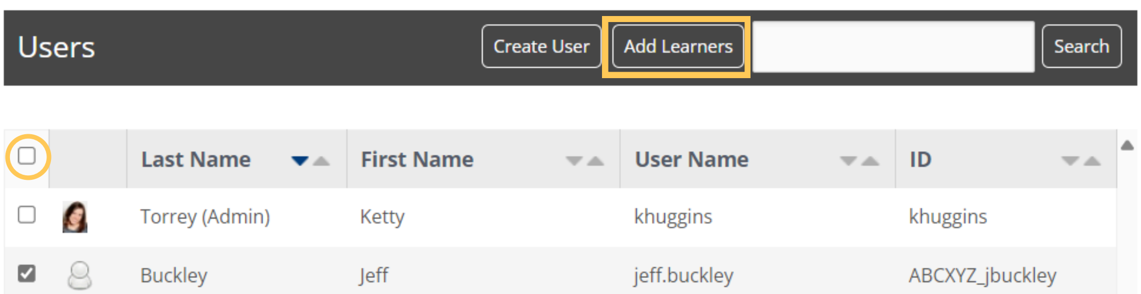
Courses tab ➞ **Term** ➞ **Course**

1. Click on the course title in which you wish to enroll users.

2. The course roster (visible only to Admins) displays on the course home page. Click **Enroll Learner**



3. Use the checkboxes to select which students to enroll and then click **Add Learners**



If using Select All, be sure to unselect user types not taking courses such as Admins and Parent accounts. Also, if you have multiple pages of users, you will need to repeat this process on each page of users. For bulk enrollments, STAR recommends using **User Training Settings** over enrolling by course.

NOTE: As users may be enrolled in advance of the course being visible to them (See **Course Start/End Dates**), staff do not get an email notification of enrollment. We recommend notifying staff directly or sending a message via the LMS. If Reminder Emails (Agents) are enabled for a course, staff will get notified of incomplete training. See Reminder Emails (Agents) in the **Course Management** guide for more information.

WARNING: There is a drop button next to each user enrolled in the course. Dropping a course from a user's enrollments will drop associated training records. Drop should only be used in cases of mistaken enrollments. If you accidentally drop a user, enrolling them in the course again will restore the record including any progress within the course.

Enrollments

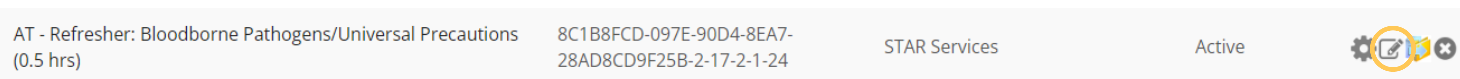
Course Start/End Dates

Course Start/End Dates are used to process enrollments in advance and then have the course "unlock" or being come visible to users at a date/time in the future. Course dates apply to ALL enrolled users. You can also use Course Start/End Dates to apply expiration dates to courses. See also **Enrolling via User Training Settings**

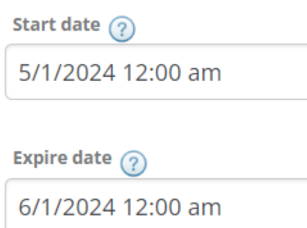
Applying Course Dates from the Admin tab

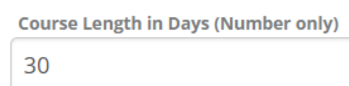
Admin tab → **Courses & Communities** → **Courses**

1. Navigate to the Course for which you want to apply dates
2. Click the **Edit** button



3. Enter a Start Date and/or Expire Date **OR** Course Length in Days and **Save**





NOTE: If setting the length in days, the course will automatically expire the set amount of days following enrollment rather than using a date range. This can only be set from the Admin tab. See **Expiring Enrollments** for more information

Applying Course Dates within the Course

Courses tab → **Term** → **Course**

1. Navigate to the Course for which you want to apply dates
2. On the lefthand navigation within the course, click **Settings** and then click on the **Details** tab

   Note: There is an option in the course navigation for Start & End Dates. This option is to set start dates for individual assignments or lessons within a course, not the course itself. Using lesson/assignment start and end dates requires additional adjustments to course settings to function properly.

3. Enter a Start Date and/or Expire Date and **Save**

IMPORTANT: If a user hasn't completed the course by the expiration date, they will be locked out of the course and the date will need to extended to grant access to the user.

Enrollments

Expiring Enrollments

Admin tab ➔ **Reports** ➔ **Course Expiring Enrollments**

If you have Course Length In Days (see **Course Start/End Dates**) set for a course, you can see expiring enrollments on the **Course Expiring Enrollments** report.

Course Expiring Enrollment

Name	First Name	Last Name	Expiring	Extension
AT - Refresher: Bloodborne Pathogens/Universal Precautions (0.5 hrs)	Iris	Paulson	2023-12-17	2024-05-30
AT - Refresher: Bloodborne Pathogens/Universal Precautions (0.5 hrs)	MC	Demo	2023-12-29	Extend

If you've already extended an enrollment, it will show the original expiration date in the Expiring column. If you've already extended a date, you can see the new expiration date in the Extension column. To extend a course which has expired or will expire soon, click **Extend** in the Extension column. This will open an extension screen where you can set a new date then **Save**.

Course Expiration/Auto Convert Settings

Admin tab ➔ **Config & Settings** ➔ **General Settings** ➔ **Course Expiration/Auto Convert**

In these settings, you can choose what happens with a student once all enrolled courses are completed, choose whether course expiration dates are visible on the Course Roster for admins, and manage expiration notifications to go out at set intervals prior to expiration.

* Message Subject

{CourseName} Expiring THIS WEEK

* Message Body

Hi {FirstName}, {CourseName} will expire on {ExpirationDate}. Please log in to https://stardemo.edvance360.com to complete your training as soon as possible.

Macros {FirstName}, {LastName}, {CourseName} and {ExpirationDate} are available.

* Days From Expiration

7

Save

Note: You can set up multiple expiration notifications (Ex. 14 days, 7 days, 3 days, 1 day) and use macros within the expiration notifications to fill in user names, course names, and expiration dates.