This document covers the policies and procedures for PennChart Instructors.

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## Introduction to Knowledge Link Administration

### Overview

The following is an overview of Knowledge Link terminology, concepts, and basic learning architecture.

<table>
<thead>
<tr>
<th><strong>Item or Course</strong></th>
<th><strong>Definition</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>An item or course</strong></td>
<td>Is a learning event that is placed on the learning plan. Items can be an eLearning (or online) course, instructor-led course, or a combination (blended learning). The icons in Knowledge Link indicate each type of course (see image below). Every item in Knowledge Link is identified by a unique Item ID (for example, HS.30001.ITEM.NEOCRS).</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Content Object</strong></th>
<th><strong>Definition</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>A content object</strong></td>
<td>Is a single learning object, most frequently used in connection with an eLearning course. An eLearning course can contain one or more content objects. When a course contains more than one content object, the content objects appear in a list when the course is launched (see image below). If there is only one content object, this list does not appear, and the course content opens immediately. Every content object is identified by a unique content object (or COBJ) ID (for example, HS.20003.COBJ.PCVWONLY). Content objects do not need to be eLearning; they may also be a quiz, a document, or a link to an external site.</td>
</tr>
</tbody>
</table>

![Image of Knowledge Link items](example.png)
Scheduled Offering

A scheduled offering is an instructor-led class. The offering is tied to an item (item ID, item title, description, etc.) and has the additional properties of a date, time, and location. Scheduled offerings are listed for a learner when they click the “Register Now” button on their Knowledge Link home page (see image below). Each scheduled offering has a unique ID that is auto-generated by the system.

Segment

Each instructor-led item and scheduled offering has one or more segments. The segments define the number of days and the length of the course. Examples of an Item Segment and a Scheduled Offering Segment, from the administrator pages, are shown below.
<table>
<thead>
<tr>
<th>Curriculum</th>
<th>A curriculum is a collection of one or more items. A curriculum allows administrators to set due dates, specify requirements for retraining, label learning as required, and track compliance. A curriculum appears as a folder underneath the course on the learning plan. The curriculum may be viewed by clicking the folder (see image below).</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assignment Profile</td>
<td>An assignment profile defines a particular group or groups of employees who will be assigned learning. These groups can be defined by a combination of criteria including: job codes, organizations or departments, entities, job families, and more. When groups are defined in this way, learning is automatically assigned or removed when employees are hired or terminated. Assignment profiles may also be defined by Penn ID, although these assignments are static and can only be updated by manually adding additional Penn IDs.</td>
</tr>
<tr>
<td>Catalogs</td>
<td>Learners are assigned catalogs based on their entity affiliations. Learners can only search for and enroll in courses that are in their catalog. At Penn Medicine, most courses appear in three different catalogs: UPHS, UNIV, and PSOM. Other courses may only appear in specific entity catalogs: UPHS_LGH (Lancaster General) and UPHS_PRC (Princeton). There is also a TEST catalog for items that are being tested.</td>
</tr>
</tbody>
</table>
Searching

Knowledge Link is a shared system with the University of Pennsylvania. Most content is identified by an ID. You can identify university-owned content if the ID contains “UP” or “UNIV.” All UPHS content will contain either “HS” or “UPHS” in the ID. For example, the item IDs below indicate one course is a UPHS course and one is a University course:

Keep this in mind as you are searching for and working with information in Knowledge Link. **Do not make any changes to University-owned content.**

When you search for any item in Knowledge Link you will have the ability to use specific criteria and a combination of various search fields to narrow down your results. Your choices for entering search criteria are:

<table>
<thead>
<tr>
<th>Search Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exact</td>
<td>If you know the precise word or phrase you are searching for</td>
</tr>
<tr>
<td>Any</td>
<td>If you have a comma-separated list of IDs, Names, etc.</td>
</tr>
<tr>
<td>Starts With</td>
<td>If you know the first few letters/numbers of the record</td>
</tr>
<tr>
<td>Contains</td>
<td>If you know any part of the record word or phrase</td>
</tr>
<tr>
<td>Does Not Contain</td>
<td>If you want all records that do not contain a specific word or phrase</td>
</tr>
<tr>
<td>Is Empty</td>
<td>If you want all records where the specified field is empty</td>
</tr>
</tbody>
</table>

In addition, you will encounter the following options when searching for information:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calendar</td>
<td>Associated with the date field. Use it to select and populate the corresponding date field.</td>
</tr>
<tr>
<td>Search</td>
<td>Click to perform a search for the desired field.</td>
</tr>
<tr>
<td>Filter*</td>
<td>Click to create a custom search that will filter your results based on one or more criteria.</td>
</tr>
<tr>
<td>Add/Remove Criteria</td>
<td>Click to add or remove more search options on your search screen.</td>
</tr>
<tr>
<td>Field Chooser</td>
<td>Click to add or remove columns in your search results.</td>
</tr>
</tbody>
</table>

* Filters require several steps to complete. A filter allows you to select criteria that a simple search will not allow. You can also combine filters to define more complicated criteria. For example, you can use a filter to search for all users in three different departments, at a specific entity, and with a particular job code.
The following is a general overview of the steps involved in searching and filtering.

1. Click the blue filter icon for the field on which you wish to filter your results. (In this example, we are using the Job Code filter.) When you click the blue filter icon, a new window will open that allows you to perform a search.

![Job Code Filter For Users](image)

2. Enter the search criteria in the fields, as desired, and click **Search**.

![Job Codes Filter For Users](image)

3. Click the box in the “Select” column for the items you wish to filter on, then click **Add to Filter**.

![Job Codes Filter For Users](image)
4. If you need to add more selections to your filter, click **Search Again** and repeat steps 2-3.
5. When finished, Click **Submit Filter**.

6. You will return to your original search screen and the filter will now indicate how many job codes (or other criteria) are selected. To clear the filter and start over, click the white filter icon.

![Filter Interface](image)

**Additional Help**

Additional Knowledge Link job-aids are available at this link:


For email and telephone support, contact the PERC at 215-615-4567 or **PERC@uphs.upenn.edu**. PERC representatives will be available to support instructors on the procedures outlined in this document.

*Beginning April 9, the PERC will be available while PennChart classes are in session (8AM-5PM).*
Send Notifications

1. On the Admin tab, click **Learning**, then click **Scheduled Offerings**.
2. Enter your Scheduled Offering ID, remove the Start Date, and click **Search**.
3. In the results, click the Scheduled Offering ID to open it.
4. Click the **Send Notification** link.

5. Choose the Registration Status depending on the notification you are sending. For example:
   a. To send a notification to only users who are enrolled, select **Active Enrollment**.
   b. To send a notification to users who were No Shows, select **No show**.

6. For Completion Status, you can leave the default selection of **All Statuses**.

7. Click **Next**.

8. To remove people from the notification, click the **Remove** checkbox, then click **Apply Changes**.
9. When the list is complete, click **Next**.

10. Add the PERC email address to the “Reply To” and “From” fields. *(PERC@uphs.upenn.edu)*

   **IMPORTANT:**
   - **Do not** click the checkbox for “Second copy of email to users’ supervisors”.
   - **Do not** add email addresses to the “Send copies to” field.

11. In the “Subject” and “Body” fields, type your text. The system will not automatically add any information about the scheduled offering. **You must type all the information that you want the learners to receive.** You may also add an attachment, if desired.

12. Click **Send Notification**. The notification will be sent.
Pre-Class Task

**Suggested Policy**

One day prior to class... complete these tasks:

- Print the roster from Knowledge Link (sign-in sheet).
- Activate the online assessment.
- Print/have enough paper quizzes for all enrollees. Do this for every class as a backup in case users cannot access Knowledge Link.

**Knowledge Link Steps**

**Part 1: Print Roster**

1. Find your Scheduled Offering ID for the class date you are checking.
2. Open the Admin tab and click the Learning button.
3. Click Scheduled Offerings, enter your Scheduled Offering ID, and click Search.

4. In the results, click the Schedule Offering ID.
5. In the **Actions** menu, click **View Roster**.

6. Open the report and print.

**Part 2: Activate Online Assessment**

1. Find your Scheduled Offering ID for the class date you are checking.
2. Open the Admin tab and click the **Learning** button.
3. Click **Scheduled Offerings**, enter your Scheduled Offering ID, and click **Search**.

4. In the results, click the Scheduled Offering ID.
5. In the Related menu, click **Segments**. If the calendar view appears, click the “List” icon.

![Calendar view]

6. Then click the segment date/time link.

![Segment details]

7. In the Edit Segment window, perform these steps:
   A. **Add one hour** to the **End Time**. (This allows access to assessments if class runs late.)
   B. Place a checkmark in the box labelled **Allow access to online content during this segment**.
   C. Click **Save And Close**.
Classroom Tasks

**Suggested Policy**

**At the beginning of class**... check attendance against the roster. Mark no-shows and write in walk-ins. Include Penn ID or Pennkey for walk-ins.

- Superusers should also sign the roster and PRINT their name, contact number and email address.
- Clinical Educators should indicate if the class is multi-day class (Day 1, Day 2, Day 3, Day 4) on the top portion for tracking. You may print a new roster for each day, or some educators choose to use the same roster and have learners initial for each day.
- **Keep the rosters for reference**. Although training is recorded in Knowledge Link, it is a good idea to keep the rosters until go-live so you are sure that all training has been recorded appropriately.

**FOR LATE ARRIVALS**... turn away anyone more than 15 minutes late. Tell the user to inform their manager that they will need to be dropped from the class and re-register for a new date.

**When class is finished**... ask the students to open Knowledge Link and start the assessment. *Walk-ins will not be able to access online content until the next step is complete.*

**When students begin the assessment**... open Knowledge Link, open the scheduled offering, add walk-ins, and change status of no-shows. *When complete, inform walk-ins they can access content in Knowledge Link.*

**NOTE**: Superusers should assist in counseling walk-ins and late arrivals. Walk-ins and late arrivals are allowed to stay if there are seats. However, if they have not completed eLearning or are late to class, they may struggle and may not pass the assessment. Inform them that failing the assessment requires post-class remediation with learner’s manager and the instructor.

**Knowledge Link Steps**

**Part 1: Start the Online Assessment**

1. Have each user log into Knowledge Link and view their Learning Plan.
2. Scroll to the title of the current class, click the arrow next to Enrolled, then click **Start Course**.

![Start Course](image)

3. The assessment may start automatically. If it does not, click the **Assessment** link. For examples of the Assessment, proceed to the next step.

![Assessment](image)
4. When the user clicks Assessment, a separate window will open, and they can click **Start**.

![Start button]

5. The user has several options for navigating the assessment.

![Screen shot of assessment with navigation options]

6. If a computer freezes or a user is kicked out, the user can return and begin where they left off.

7. Users will be warned if they do not answer all questions before they submit the assessment. Unanswered questions will be marked incorrect.
Part 2: Update KL with Walk-Ins and No-Shows

1. Find your Scheduled Offering ID for the class date you are checking.
2. Open the Admin tab and click the Learning button.
3. Click Scheduled Offerings, enter your Scheduled Offering ID, and click Search.

4. In the results, click the Scheduled Offering ID.
5. In the Related menu, click Registration.
6. To add a walk-in:
   A. Click the green (+) labelled Add Users.

   B. Enter the user’s Penn ID in the User ID field -- OR -- enter the user’s Pennkey in the Pennkey field and click Search. (Use Add/Remove Criteria if Pennkey is not an option on your search window.)
C. Change the Registration Status to “Walk-in or addition by administrator” then check the box in the Add column. Uncheck all the email confirmation boxes, then click **Add**.

D. Repeat steps A-C for each walk-in.

7. To mark a user as a no-show:
   A. Place your mouse cursor over a name in the Enrolled list and wait for the pop-up box to appear.
   B. Click the **Modify** link.

C. Change the Status to “No show” and click **Save**.

D. Repeat steps A-C for each no-show.
End of Class Tasks

### Suggested Policy

**When a user passes the assessment**... confirm the user completed the course assessment and has received credit for the course. (The course is no longer on their learning plan.) If so, the user may leave.

**When a user fails the assessment**... review the quiz responses with the user and counsel them on why they got the answers wrong. Allow them to take a second attempt.

**When a user fails the assessment a second time**... explain that you will get in touch with their supervisor and the supervisor will schedule time to review the system with the user. The supervisor will inform the instructor when the user can retake the assessment. The user will need to return to take a paper assessment.

**Note:** If completion of the assessment takes more than one hour, the user may not be able to access the assessment. If this happens, repeat the steps in Activate Online Assessment (page 12) and add additional time to the end time of the scheduled offering. *This may interfere with the start of the next class.*

### Knowledge Link Steps

**Review the Assessment**

1. On the last screen of the assessment, the user will see their score and a Review Quiz button.  
   **IMPORTANT:** The user must not exit this screen or they will not be able to review the questions.

2. Click **Review Questions** and use the quiz navigation to go to each question and review the answers.
After Class Tasks

Suggested Policy

For users who failed the assessment a second time... contact the user’s supervisor and ask the supervisor to review PennChart procedures. Ask the supervisor to contact you when the user is ready to retake the assessment. (User will take a paper assessment.)

When a user takes a paper assessment... grade the assessment and, if the user passes, mark them complete in Knowledge Link. If the user does not pass, continue to counsel the user on incorrect answers until you are satisfied they understand the proper procedures. Once satisfied, mark the user complete in Knowledge Link.

For users that were marked as no show... send a notification to the no shows. See Send Notifications on page 8 for instructions.

Knowledge Link Steps

Manually Award Completion Credit

NOTE: Before completing these steps, be sure that the scheduled offering has been updated with walk-ins and no-shows. See section “Update KL with Walk-Ins and No-Shows” on page 16.

1. In the Admin tab, navigate to Users > Tools > Record Learning – Multiple.
2. Select the Scheduled Offering option.
3. In the Search & Add Offerings section, enter the scheduled offering number and click Add.
4. In the Search & Add Users section, select **Auto Fill From Registration** to add the list of users who were registered for the offering.

![Image of Search & Add Users section]

5. Click **Remove** for learners who **should not** get manual credit. (Those who already received credit or who did not pass the assessment.)

6. Click **Next**.

7. In the Edit Details section, enter the Completion status: **COURSE-COMPLETE (Complete) - For Credit**. Then click **Next**.

![Image of Edit Details section]

8. Click **Do Not Assess**, then click **Submit**.

![Image of Do Not Assess]

9. The completion will be awarded.