

## Manager-Enroll Staff for Classroom Education

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### Which Virtual Sessions and/or In-Person Classes?

The first step is to identify which classes/virtual sessions your team members will need to attend. In the **Transforming with Technology Go-Live (Ambulatory version) – Education Catalog**, you will find the education plan for the Medical Assistants, Nurses, Clinical Associates, and Dietitians at your practice(s). The workbook is designed to walk you through how to determine what education your team will need to complete. It also provides you with the dates and times for all virtual and in-person educational offerings for planning purposes.

Look for the **Start Here** tab for instructions for navigating the workbook. We hope you find this workbook helpful, as you plan for your team's preparatory education.

### The Delegate Option

If you would prefer to delegate this responsibility to a member of your staff *who has not enrolled your employees in the past*, please reach out using the link at the bottom of the page. Include the employee's name and employee number. This will allow CI to update the employee's permissions.

### Let's Get Started: Log-in to PromisePoint

Class enrollment is done using the PromisePoint Community. Please use Chrome or Internet Explorer to complete this work; Safari and Edge are not compatible.

- **Log-in to PromisePoint at [www.promisepoint.com/northernlighthealth](http://www.promisepoint.com/northernlighthealth).**
  - Username: **Seven-digit employee number** (with leading zeros). Example: 0099999.
  - Initial Password: **password**
    - Case-sensitive, all lowercase
    - Reset password, if prompted.
- **To open the Class Attendance tool, click the flip-up calendar icon in the top menu.**
  - If you or your delegate does not have this option, please reach out to CI using the link below.
  - Click the blue **Manage Class Attendance** button on the left. PromisePoint Administration Self Service (PASS) will open.
  - The first time you log-in to PASS, you will need to **confirm your email address**.
- After confirming your email address, the Class Attendance tool will open.

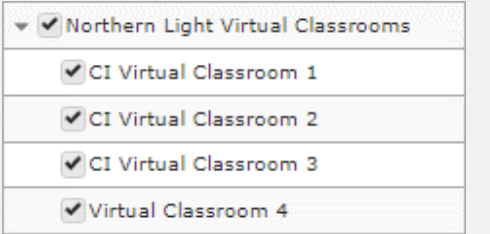
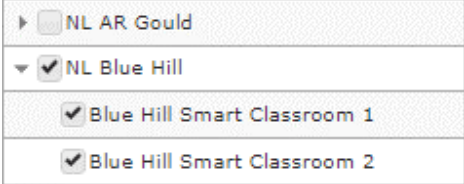
For delegate access, password resets, or to report issues accessing the Class Attendance tool, please use the Clinical Informatics Quick Access form in the Self-Service Portal. [Click here to request assistance.](#)

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**Recommended Filters for Use When Enrolling Staff**

➤ **Set-Up the Filters**

The navigator on the left side of the screen allows you to pull in the location and classes you need without having to browse classes you don't need.

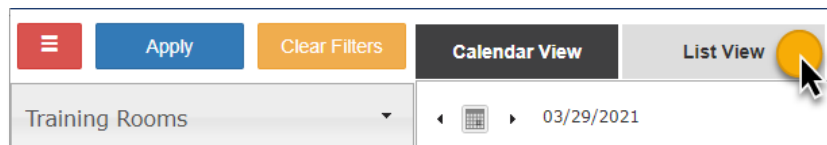
<i>Navigator Section</i>	<i>Place a checkmark beside...</i>	<i>What it will look like...</i>
<i>Training Rooms</i>	Northern Light Virtual Classrooms  NL [Member Organization] NOTE: This is only needed if your team needs to attend the Amb. Clinical Intake Opt. Classes.  EMMC: Please select NL EMMC & NL Home Office (Cianchette Bldg.)	  Example: 

**IMPORTANT:** Click the blue **Apply**  button before moving on to the next step.

➤ **Switch to List View**

The default Class Attendance view is Calendar View. This view is perfectly fine to work from, but it's not as efficient as List View. We recommend that you switch views before continuing.

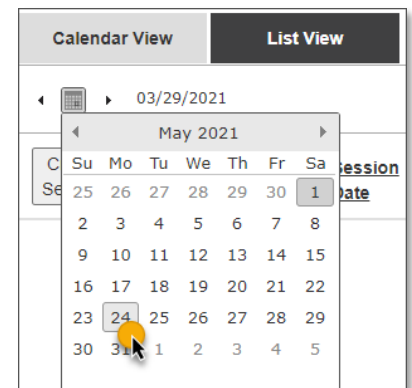
- Click **List View** in the upper left corner of the calendar area – just to the right of the blue **Apply** button.



➤ **Choose the Timeframe**

The date defaults to today in Day view. You will want to change this to pull in the classes you need. There are two steps to setting up your timeframe.

- STEP 1:** Select the first day the class is offered.
- Click the calendar icon and use the carats to scroll to the correct month.
  - Click to select the correct date.



**STEP 2:** Choose Day / Week / Month

- Many managers choose to change the timeframe to **Week** or **Month** when enrolling teams.
- Click to choose desired timeframe in the upper right corner of the screen.



## Start Enrolling

All available sessions of the selected class(es) will appear in a list view that's similar to a spreadsheet, allowing you to see multiple classes at once. This view also lets you see information on seat availability.

### ➤ Open the Roster

The date defaults to today in Day view. You will want to change this to pull in the classes you need. There are two steps to setting up your timeframe.

**STEP 1:** Hover cursor over a class. This will highlight the class in light blue and reveal the Edit and Roster buttons (on the left).

**STEP 2:** Click the **Roster** button. The Roster window will open showing the names of those already enrolled.

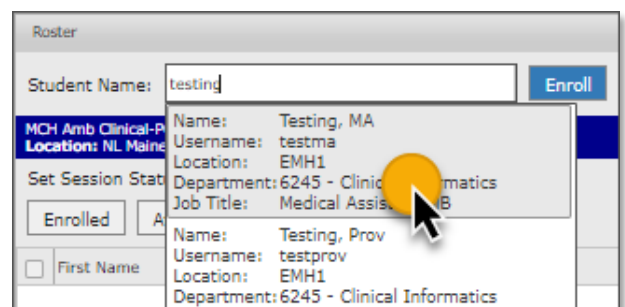
Class/Event	Type	Session Date	Start Time	End Time	Status	Room	Location	Enrollments	Max Enrollments	Instructor(s)
Amb Clinical Intake Opt. Class	Physical Classroom	07/29/2022	8:30 AM	11:00 AM	open	Inland Smart Classroom 2	NL Inland	0	4	Jesse Ward

**IMPORTANT:** Please manage enrollments for your own team; do not make changes to other employees' enrollment statuses.

### ➤ Enroll Your Staff

**STEP 1:** Type the name of the first employee into the **Student Name** field in the Roster window.

- You may type [first] [last] or [last] comma [first]. Examples: Ed Student or Student, Ed
- If you prefer, you may use the staff member's employee number. Example: 0099999
- The database will start searching right away and show results in a dropdown window.



**STEP 2:** Click to select the correct result in the dropdown.

- The selected result will now appear in the **Student Name** field.
- Repeat to add any other staff members. You may add as many people as there are available seats in the class. If you attempt to go over, you will encounter an error message.

# Manager Enrollment

**STEP 3:** Click the blue **Enroll** button to add the staff members to the class session.

- A **green banner** will appear reading, "**Successfully enrolled students.**"



- Click the **X** in the upper right corner of the Roster window to return to the List View.
- The number of enrollments will be updated to reflect the new additions.

## Potential Alert Messages During Enrollment

When enrolling staff members in class sessions, you may encounter a couple informational alerts.

### ➤ Orange Banner

- The **orange banner** appears in two scenarios:
  - When at least **one student has been successfully enrolled and at least one other has not**. Click the **X** to continue, or...



- When a student has been **Waitlisted**.



If the issue persists, preventing you from being able to enroll the employee, please use the Clinical Informatics Quick Access form in the Self-Service Portal. [Click here to request assistance.](#)

### ➤ Red Banner

- If you attempt to add more staff members to a class than there are available seats, you will get the **red banner**.



- Click the **X** to continue.
  - Return to the **Student Name** field and remove the name(s) of the students causing the maximum capacity to be exceeded, then click **Enroll**.
  - You may now add any names you want added to the Waitlist one at a time.
  - This will cause the **orange banner** to appear, as the student will be placed on the waitlist.
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## Manage Enrollments

Inevitably, changes will need to be made to the rosters. If you need to move a staff member into a different class session, please follow the steps below.

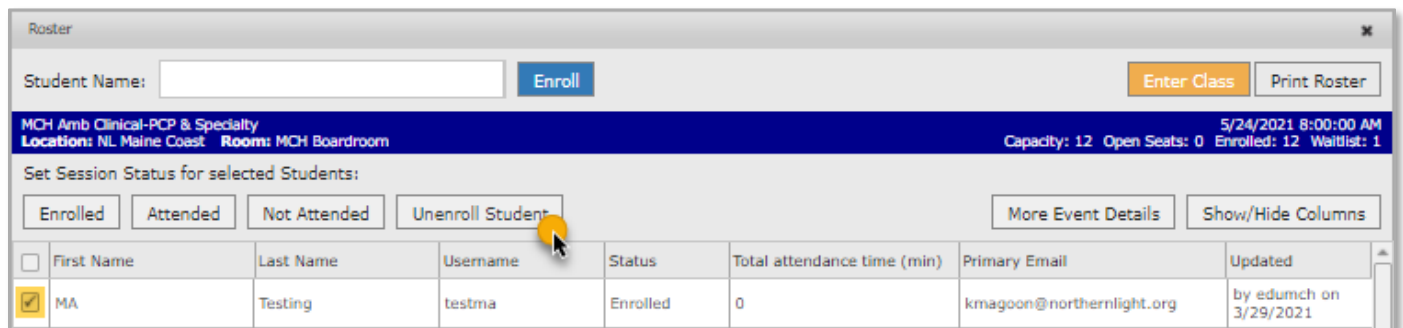
### ➤ Move Staff Member to a Different Class

**STEP 1:** Hover cursor over the class in which the staff member is enrolled. This will highlight the class in light blue and reveal the **Edit** and **Roster** buttons (on the left).

**STEP 2:** Click the **Roster** button. The Roster window will open.

**STEP 3:** Place a checkmark beside the name of the person to be moved.

**STEP 4:** Click **Unenroll Student**.



The screenshot shows a 'Roster' window with a search bar for 'Student Name' and an 'Enroll' button. Below the search bar, there are buttons for 'Enter Class' and 'Print Roster'. A blue header bar displays 'MCH Amb Clinical-PCP & Specialty', 'Location: NL Maine Coast', 'Room: MCH Boardroom', and '5/24/2021 8:00:00 AM'. Below the header, there are buttons for 'Enrolled', 'Attended', 'Not Attended', and 'Unenroll Student'. A table lists students with columns for 'First Name', 'Last Name', 'Username', 'Status', 'Total attendance time (min)', 'Primary Email', and 'Updated'. The first student, 'MA Testing' with username 'testma', is checked and has a status of 'Enrolled'.

	First Name	Last Name	Username	Status	Total attendance time (min)	Primary Email	Updated
<input checked="" type="checkbox"/>	MA	Testing	testma	Enrolled	0	kmagoon@northernlight.org	by edumch on 3/29/2021

**STEP 5:** Proceed with enrolling the staff member in the desired class session.

Please direct all inquiries to the Clinical Informatics team using the Quick Access form in the Self-Service Portal.

[You may also click here to request assistance.](#)