



## Owners Guide to Learning Groups

**Important:** As an Owner, only you can create or change the learning group settings and invite Manager(s) or Evaluator(s) to the learning group. A Manager can invite members (Learners) and view Learner progress on assigned content, CE attainment, and the home page. An Evaluator can view Learner progress and the home page. To share the responsibility of inviting Learners or monitoring their progress, you may want to invite one or more Managers or Evaluators to assist with large groups or multiple groups.

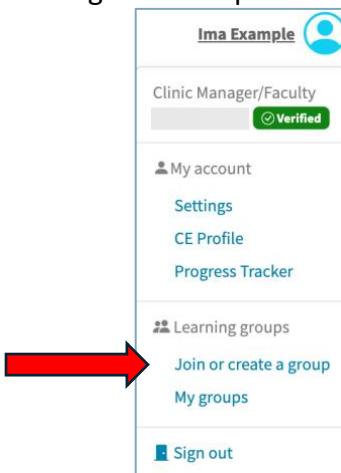
This guide uses screenshots to illustrate how an Owner ("Ima Example") (1) creates a group, (2) invites Learners, (3) views group progress, and (4) invites a Manager and/or Evaluator. To view what a Manager and Evaluator, or a Learner experience when joining a group, please view the *Managers and Evaluators Guide* and the *Learners Guide*.

### How to create a group

A learning group can be created on Hepatitis B Online (HBO) either during or after account registration. This guide assumes you have already created an account.

1. When you are signed in to the website, click on your name in the upper right to view the drop-down menu (Figure 1), and click on "Join or create a group." To invite group members or view their progress, learning group management team members (Owners, Managers, and Evaluators) must have a verified e-mail address.

Figure 1. Drop-down Menu



2. Complete the six highlighted actions on the "Create a New Group" page (Figures 2 & 3). Describe the purpose of your group. Your group members will not see this information. The default number of Learners is 50, but if your group size may exceed 50, enter an approximate number. We can expand your group size, which is generally completed within one business day. To expand your group size later, click on the Intercom chat button  in

the lower right and provide the group name and the new estimated number. We will update your group size within one business day and notify you.

Figure 2. Create a New Group (Top of page)

**Create a New Group**

**Note:** This group will be created on and only accessible from the Hepatitis B Online.

Group's Name

**Hepatitis B Online Example Group** 32/50 characters

Group's Location

Where is this group located?

If group members are geographically spread out, enter the ZIP code for where your organization is located or where the majority of the group members reside.

Check here if group is not located in the United States

ZIP Code **98104**

Why are you creating this group?

Information entered here will help us understand the motivation behind this group and help us assist you better in the future. You may want to include information such as:

- The number of individuals you plan to invite

**By default, groups are limited to 50 members.** We can increase this limit within two business days if you explain the situation below or if you contact us in the future.

- Whether you will require continuing education credits (CNE/CME) or certificates of completion
- Whether you would like to utilize the entire curriculum; or you will select certain modules, lessons, or question bank topics.

**I will assign certain lessons and ask members to submit a CE certificate or certificate of completion to document their work.**

Figure 3. Create New Group (Bottom of page)

Group Ownership

- **You will be this group's owner**, and have the ability to invite and manage other group members.
- **You will always be responsible for this group**, even if you appoint others to help you manage it.

Group Terms of Use Agreement

Before and while utilizing the group functionality of our website, group owners, managers, and evaluators must agree to the following **Group Terms of Use Agreement**:

- Any evaluations of group members should be based on completion or non-completion of activities and NOT on relative scores on activities. Group managers will not use individual's scores or progress to determine a grade or to measure job performance.
- The individual group members' scores (percentage of correct answers on quizzes, Question Bank sections, etc.), progress, and any individualized analytic reports will be kept private. This information about an individual shall not be shared with other Learners in this group.
- Invitations to join the group will only be sent to individuals who have a reasonable expectation of accepting the invitation (i.e. do not use the invite function to spam).
- Hepatitis B Online reserves the right to take action against groups who are found to be in violation of this agreement, and to insure the privacy of all Learners on the curriculum.

Updated December 7th, 2018.



Example, Ima  
Clinic Manager/Faculty



I take ownership of this group, and I agree to the Group Terms of Use Agreement

CREATE GROUP ➔

3. After you click on the “Create Group” button, the home page appears (Figure 4). Note the tabs in the upper left. Your Learners will ONLY see the home page, so you are encouraged (but not required) to provide instructions and group description here. A Manager will see all tabs except “Settings,” and an Evaluator will only see the “Home” and “Progress” tabs.

Figure 4. Group Home Page

**Hepatitis B Online Example Group**

Owner

Home Progress Members Settings ?

Active Learners: 1 Total Learners: 3

Instructions for Learners

You can provide instructions for Learners in your group on the **Settings** tab.

Recent Activity

You are this group's owner and can see activity of all Learners and names of all members.

About Hepatitis B Online Example Group

Your group description is empty! You can provide a description for your group on the **Settings** tab.

- Click on the “Settings” tab to enter a group description and instructions for your Learners (Figure 5).

Figure 5. Top of Settings Page

Group Information

Group Name: Hepatitis B Online Example Group (32/50 characters)

About this Group

Tell your members what this group is about. **Learners, managers, and evaluators will see this description before they join your group.**

Learning group members will learn how to diagnose, treat, and prevent hepatitis B. (82/400 characters)

Instructions for Learners

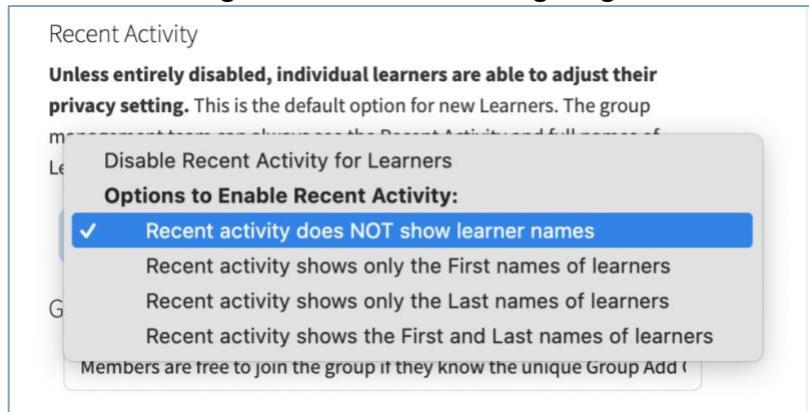
Provide instructions you would like your Learners to follow. You may specify specific modules you would like them to focus on, provide deadlines, etc.

Please read the following lessons: epidemiology; screening, testing, and diagnosis; initial evaluation; when to initiate treatment; and HCC screening. Pass the quizzes, and complete the surveys. Please submit a copy of your CE certificate or certificate of completion to document your work.

- Option:* Scroll down to add your organization logo or an image of your choice. Some Owners upload their pictures.
- Option:* Click on one of the four privacy setting choices to determine what your Learners will see on the group home page (Figure 6). The default is to NOT show Learner names. If

you enable sharing, individual Learners can still choose to opt out of sharing their name on the home page. Management team members always see Learners' full names and their activities on the group home page (Figure 4). You *must* click the blue "Update Group" button every time you make changes to the settings.

Figure 6. Bottom of Settings Page



### How to invite Learners

1. Sign in and click on your name in the upper right. Click on "My groups" in the drop-down (Figure 1) and select your group on the next page. Click on the "Members" tab to view the Members page.
2. You have three options to invite Learners:
  - a) Invitation URL link – Use when Learners may or may not have registered on the website or you want to include it in your training materials. Also, you can include it in an invitation from your e-mail account. If the Learner already has an account but is not signed in, they are guided to do so. If they don't have an account, they will be prompted to register before joining the group. This method is recommended for large groups or if your organization has a strong firewall or spam filter.
  - b) Group Add Code – Use when Learners are already registered on the website. They sign in, select "Join or create a group" (Figure 1), and enter the Group Add Code. In your training materials, we suggest you provide a link to the website with code.
  - c) Invite through E-mail – Use the website e-mail template or tailor the template to meet your needs. This method allows you to track invitations on the "Invite Learners" tab. The e-mail is sent from [support@hepatitisb.uw.edu](mailto:support@hepatitisb.uw.edu).

Note: To see what your Learners will experience based on the options above, please view the *Learners Guide*. You can distribute the entire guide, or you can share relevant parts, such as how to enter the Invitation URL or Group Add Code.

## **How to use the Invitation URL or Group Add Code to invite Learners**

1. From the “Members” tab, click on “Invite Learners” (Figure 7).

Figure 7. Members: Enable Invitation URL and Group Add Code

**Hepatitis B Online Example Group**

Owner

Members

Total Members: 5 (Out of 50 max)

Learners: 3

Pending: 0

Group Add Code: [REDACTED]

New Learners can join with Group Add Code, or be invited.

**Group Add Code**

The group add code allows learners to join your group without an invitation.

**Learners must be invited** via e-mail to join this group

**Allow Learners to join the group** with the unique Group Add Code

**UPDATE >**

**Invite through Add Code**

The Group Add Code is a unique 10 character code that is specific to your group. New Learners can join your group by typing in this code after they have registered, or by registering through the Join Group function on the site.

**Group Add Code**

This is a unique code that will allow anyone that knows it to join your group.

**GENERATE NEW CODE**

**Invitation URL**

This is a customized URL that you can send to prospective group learners. You do not need to include this URL in your Welcome Message when you invite participants using e-mail form.

2. Select the second option under “Group Add Code” on the left, then click “Update” (Figure 7). This will generate an Invitation URL and Group Add Code. You may disable/enable the Group Add Code at any time. The Invitation URL and Group Add Code will remain the same.
3. Copy and paste the Invitation URL or the Group Add Code with a link to the website to your training materials or into an invitation from your e-mail account.

## **How to invite through E-mail**

Within the “Invite Learners” tab, scroll down to “Invite through E-Mail.” You can personalize the invitation or use the sample text provided. Your name and title, group name, and e-mail address will be auto-filled at the end of the message. The link to join the learning group will appear at the end of the e-mail. Enter their e-mail(s) and click “Send Out Invites.”

If a Learner doesn't receive the invitation, ask them to check their spam or junk folders for an e-mail from [support@hepatitisb.uw.edu](mailto:support@hepatitisb.uw.edu). Sometimes, an organization's firewall blocks the e-mail invitation. If this happens, you have two options to resolve the issue:

1. You can copy and paste the website invite text above into your own e-mail. Enable the "Group Add Code" and copy and paste the invitation URL link into the e-mail. Learners click on the Invitation URL and confirm they want to join the group. If they are not already registered, they will be prompted to register before joining the group.
2. Ask the Learner to create an account on the website and share their e-mail address with you. You can then resend the invitation to that e-mail. The Learner will see a pop-up message about a pending group invitation after they register.

### **How to view group membership**

From the "Members" tab, click on the "Current & Pending" tab (Figure 8) to monitor who has joined your group and who has yet to accept the invitation. This feature is only available if you used the Invite through E-Mail method. You can also resend the invitation from this page. If a Learner declines your invitation, their name will no longer appear in your group. To remove Learners or management team members from a group, click on "Remove." A Learner can leave the group from the group home page.

Figure 8. Members: Current and Pending

**Hepatitis B Online Example Group**

**Owner**

**Members**

**Current & Pending**

**Learners**

**Pending**

**Group Add Code**

**Total Members** 3

**Learners** 2

**Pending** 1

**Out of 50 max**

**Owner** originally created the group.

**Manager** can invite and remove learners. They can also see group results and those of selected learners.

**Evaluator** can see group results and those of selected learners.

**Learner** is able to sign-in and participate in the group.

**Pending** members have been invited but have yet to accept the invitation.

**Learners**

Profile	Name	Role	Action
	Example, IDEA Coordinator	Learner	<b>X REMOVE</b>
	Learner, IDEA Coordinator	Pending	<b>RESEND INVITATION</b> <b>X REMOVE</b>

## How to monitor group progress

Learning group Owners, Managers, and Evaluators can view Learner progress through the lessons. The “Progress” page will default to view the lessons in the current edition of HBO. Click on the box below “View Progress for:” to view progress in previous editions. The “Progress” tab (Figure 9) enables you to:

1. View a Learner’s progress on a lesson and see if they passed the quiz or earned CE.
2. Hover over a Learner’s progress to see the number of quiz attempts, the number of correct answers, and the percentage score.
3. Click on a Learner’s e-mail address to e-mail them about upcoming deadlines, congratulate them on their work, request certificate copies, etc.
4. Enter a Learner’s name in the search box if you have a large group.

Figure 9. Viewing Group Progress

**Hepatitis B Online Example Group**

Only current learners' progress is included. Use the tabs below to look at progress within the individual parts of the curriculum.

Active Learners (last 30 days) **3**      Current Learners **3**

**Modules**

View progress for: **Latest Edition Curriculum Progress**

50 records per page

When to Initiate HBV Treatment

Search:

Learners	Hepatitis B Online (3rd Ed.)	When to Initiate HBV Treatment
Example, IDEA @gmail.com	100 80 10	Progress: 100% Accessed: January 21, 2026, 12:14 pm Attempt 1 CNE 4/5 - 80% 7 8 9 10 11
Hull, Todd @yahoo.com	100 0	80
Learner, IDEA @gmail.com	100 100 100 100 100 100 100 100 100 80 100	

Showing 1 to 3 of 3 entries

← Previous 1 Next →

**Key**

**CNE/CME** - CE was earned  
**CNE/CME** - CE was attempted

Learner progress is delayed by up to 15 minutes

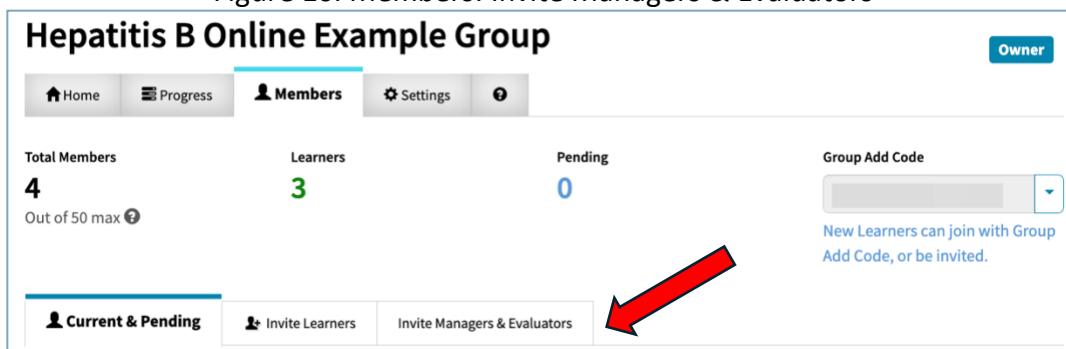
The bar represents progress. A checkmark in the bar indicates 100% complete. The number under the bar is the score (as a percentage) for the last attempt. A plus (+) indicates more than one attempt. Hover your mouse over each box for more details.

### **How to invite Managers or Evaluators**

If you expect to have a large group or several groups, you may want to consider inviting Manager(s) and/or Evaluator(s). For instance, if your organization has multiple locations, you could set up a learning group for each location and invite a Manager from each location to invite the Learners. Some facilities invite training or human resources staff as Managers or Evaluators so they can view Learner progress and CE attainment. Owners are encouraged to view the *Managers Guide* to better understand what a Manager will see when they join the group, invite members, and review progress.

1. Sign in and click on your name in the upper right. Click on “My groups” in the drop-down (Figure 1) and select your group on the next page. Click on the “Members” tab to view the members in your group.
2. Click on the “Invite Managers & Evaluators” tab (Figure 10).

Figure 10. Members: Invite Managers & Evaluators



The screenshot shows the 'Members' page for a group named 'Hepatitis B Online Example Group'. At the top, there are tabs for 'Home', 'Progress', 'Members' (which is selected and highlighted in blue), 'Settings', and 'Owner'. Below the tabs, group statistics are displayed: 'Total Members' (4), 'Learners' (3), and 'Pending' (0). To the right, there is a 'Group Add Code' input field with a dropdown arrow. A note below it says 'New Learners can join with Group Add Code, or be invited.' At the bottom of the page, there are three buttons: 'Current & Pending' (selected and highlighted in blue), 'Invite Learners', and 'Invite Managers & Evaluators'. A red arrow points to the 'Invite Managers & Evaluators' button.

3. Enter the e-mail address(es) and choose either “Manager” or “Evaluator.”
4. You have the option to personalize the e-mail invitation. Click on the “Send Out Invites” button.
5. In the pop-up message, confirm the invitation is correct, then click on “Yes, Invite these individuals.”
6. Invitees will receive an e-mail from [support@hepatitisb.uw.edu](mailto:support@hepatitisb.uw.edu). If your invitees do not receive the e-mail, ask them to check their spam or junk mail folders. If they are already registered on the website, they will see a pop-up window with a link to view and accept the invitation when they next sign in.

### **How to ask questions**

Sign into the website and click on the Intercom chat button  in the lower right. This account is monitored Monday through Friday from 10:30 a.m. to 8:00 p.m. Eastern Time, with automated answers outside of those hours. You can also click on “Contact Us” at the bottom of the page to e-mail us at any time.