



## Managers and Evaluators Guide to Learning Groups

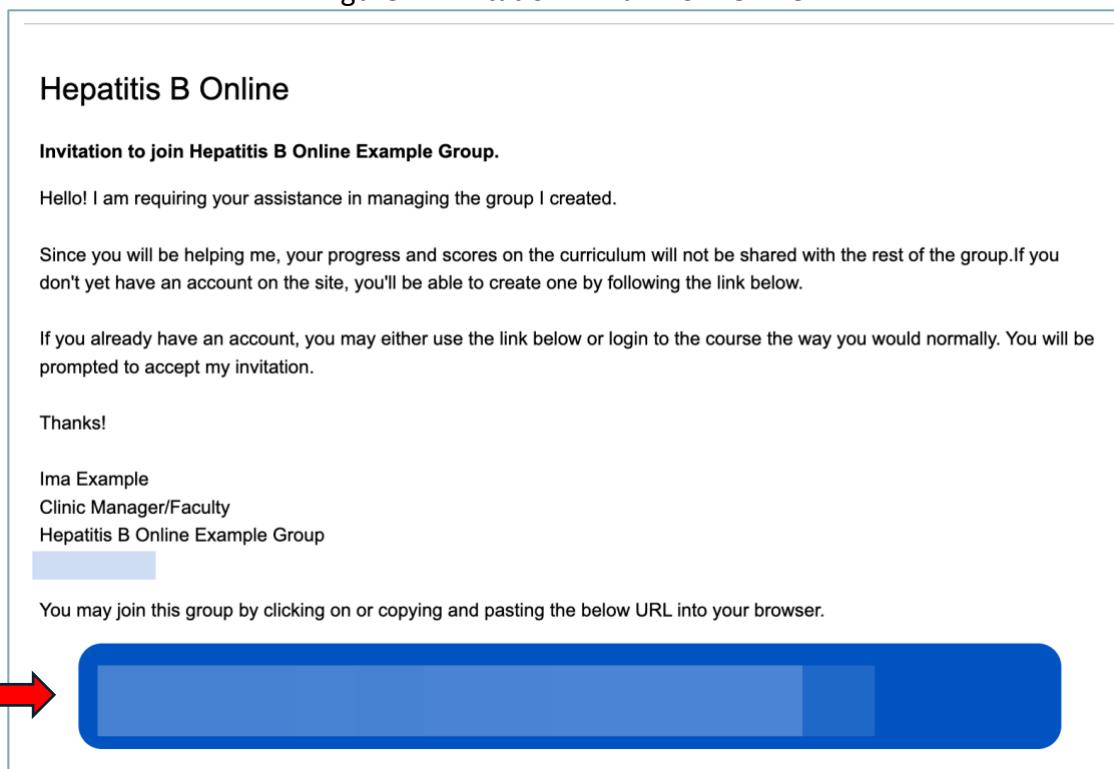
**Important:** Managers can invite or remove Learners from a group and view the home page and group progress. Evaluators can only view the home page and group progress. Only an Owner can change the learning group description and instructions, or invite Managers and Evaluators.

This guide uses screenshots to illustrate how a Manager: (1) accepts an invitation from an Owner ("Ima Example"), (2) invites Learners to the group, and (3) views the group progress. To see what a Learner might experience, please view the *Learners Guide*.

### **How to accept your invitation from a Learning Group Owner**

1. A Hepatitis B Online (HBO) Learning Group Owner will e-mail you an invitation from [support@hepatitisb.uw.edu](mailto:support@hepatitisb.uw.edu) (Figure 1). Click on the link in the blue box.

Figure 1. Invitation E-mail from Owner



Hepatitis B Online

**Invitation to join Hepatitis B Online Example Group.**

Hello! I am requiring your assistance in managing the group I created.

Since you will be helping me, your progress and scores on the curriculum will not be shared with the rest of the group. If you don't yet have an account on the site, you'll be able to create one by following the link below.

If you already have an account, you may either use the link below or login to the course the way you would normally. You will be prompted to accept my invitation.

Thanks!

Ima Example  
Clinic Manager/Faculty  
Hepatitis B Online Example Group

You may join this group by clicking on or copying and pasting the below URL into your browser.

<https://hepatitisb.uw.edu/group/123456789>

2. If you already have an account, sign in on the landing page (Figure 2). If you do not have an account, please click on "Register" in the upper left.

Figure 2. Join a Group

The screenshot shows a web page for joining a group. At the top, there are buttons for 'Register', 'Account Retrieval', and 'Join a Group'. The 'Join a Group' button is highlighted with a red arrow. Below it, the group name 'Hepatitis B Online Example Group' is displayed in blue. A section titled 'About this group' includes a description: 'Learning group members will learn how to diagnose, treat, and prevent hepatitis B.' Below this, it says 'You will be helping the following individuals manage this group.' and shows a 'Group Owner' named 'Example, Ima' with the title 'Clinic Manager/Faculty'. To the right, there is a sign-in form for 'Hello IDEA Example' with fields for 'Email Address' and 'Password', and links for 'Forgot password?' and 'SIGN IN'. At the bottom right of the sign-in form, there is a link 'Not IDEA?'

3. Once you have signed in or created an account, please ensure your e-mail address is verified by clicking on your name in the upper right; a green “Verified” box should be next to your e-mail address in the drop-down menu. If not, click on “Verify.” Once you are verified, you can access the learning group.
4. Carefully read the “Group Terms of Use Agreement” (Figure 3) and click on “Join the Group.”

Figure 3. Group Terms of Use Agreement

The screenshot shows a 'Group Terms of Use Agreement' page. At the top, there are buttons for 'Account Settings', 'Change E-Mail', 'Change Password', 'CE Profile', 'Join a Group', 'New Group', and 'PF'. The 'Join a Group' button is highlighted with a red arrow. Below it, the group name 'Hepatitis B Online Example Group' is displayed in blue. A section titled 'About this group' includes a description: 'Learning group members will learn how to diagnose, treat, and prevent hepatitis B.' Below this, it says 'You will be helping the following individuals manage this group.' and shows a 'Group Owner' named 'Example, Ima' with the title 'Clinic Manager/Faculty'. To the right, there is a section titled 'What would you like to do?' with a 'Join this Group' button. Below it, it says 'Join Hepatitis B Online Example Group as a Manager.' and lists two bullet points: 'Your progress and scores in the curriculum will not be shared.' and 'Your name and e-mail address will be visible to other group members.' At the bottom right, there is a note: 'By joining this group, you are agreeing to abide by the Group Terms of Use Agreement'.

## **How to view group membership**

1. Sign in and click on your name in the upper right. Click on “My groups” in the drop-down and select your group on the next page.
2. Click on the “Members” tab. The “Current & Pending” tab (Figure 4) lists everyone who has joined your group, which invitations are still pending, and each person’s role in the group (Owner, Manager, Evaluator, or Learner). You can also resend an invitation or remove members from this page. If a Learner declines your invitation, you won’t see their name on the list.

Figure 4. Members: Current & Pending

**Hepatitis B Online Example Group**

Owner

Home Progress Members Settings

Total Members 3 Out of 50 max

Learners 2 Pending 1

Group Add Code

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

**Current & Pending** Invite Learners Invite Managers & Evaluators

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	
	Learner, IDEA Coordinator	Pending	

## **How to invite Learners**

1. To invite Learners, click on the “Invite Learners” tab on the “Members” page (Figure 5).
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. Learners click on the Invitation URL to confirm they want to join the group. If they are not yet registered, 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” from the drop-down menu in the upper right, and enter the Group Add Code on the next page. In your training materials, we suggest you provide a link to the website with the Group Add 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 via the “Invite Learners” tab. The e-mail is sent from [support@hepatitisb.uw.edu](mailto:support@hepatitisb.uw.edu).

Note: To see what 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 and Group Add Code**

1. From the “Members” tab, click on “Invite Learners” (Figure 5).

Figure 5. 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:  ▼

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

**Invite Learners**

**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**

**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. If the Owner hasn't already done so, select the second option under "Group Add Code" on the left, then click "Update" (Figure 5). This will generate an Invitation URL and Group Add Code. You may disable/enable the URL and 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:

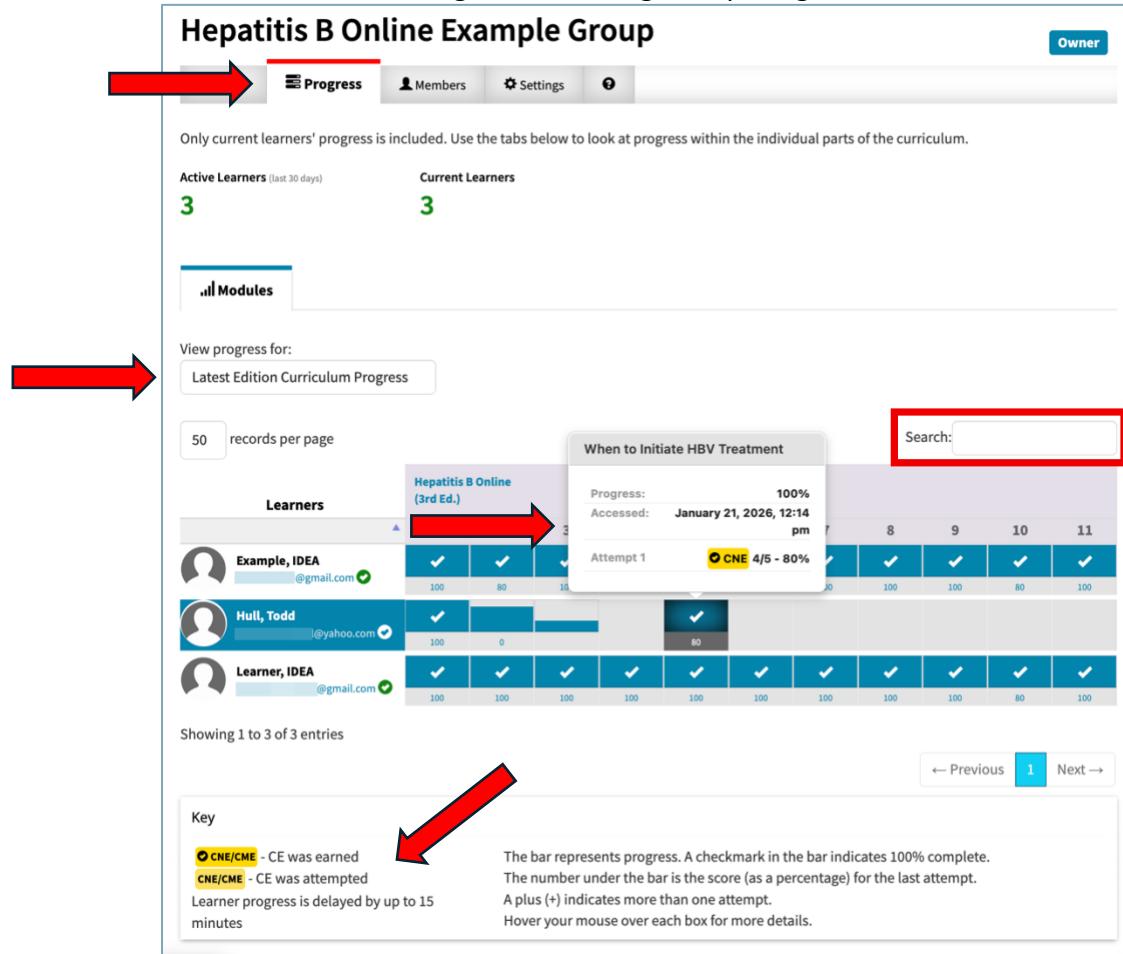
1. You can copy and paste the website invite text into your own e-mail. Enable the "Group Add Code" and copy and paste the Invitation URL link into the e-mail. Learners click on the Invitation URL and confirm they want to join the group. If they are not already registered, they will be prompted to register 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 monitor group progress**

Learning group Owners, Managers, and Evaluators can view Learner progress through the lessons and question bank topics. 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 6. Viewing Group Progress



### 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.