Facility Administrator Dashboard User Guide
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If you cannot find the answer to your question in this user guide, please contact us:

Phone: 903-871-2150
Normal Hours of Phone Support: 9 AM – 5 PM Central Time
Zone Monday-Friday

Email: support@pedagogy-inc.com

Support e-mail is monitored 7 days a week from 8 AM to 8 PM
We strive to respond to any email request within 24 hours
Logging In

How to Access the Pedagogy Education Portal

- Open a web browser and go to http://portal.pedagogyeducation.com
- Enter your username and password
- Click “Log In”
- If this is your first time logging in, you will need to update your password and other information

How to Update Your Information

- Click “My Information”

- Here you can edit your email address, password, and certificate information

- In the “Personal Information” box, enter your email address and click “Save” to save your changes
• In the “Reset Password” box, enter your new password, reenter the password to verify it, and click “Reset Password” to change your password
• In the “Personal Certificate Information” box, enter your name as it should appear on your certificate. There is no need to enter the facility code unless you are switching facilities
• Next select your license type, enter your license number, select the state and click “Add”
• To edit a license, click the pencil beside that license

<table>
<thead>
<tr>
<th>License Type</th>
<th>License Number</th>
<th>State</th>
</tr>
</thead>
<tbody>
<tr>
<td>Licensed Practical/Vocational Nurse - LPN/LVN</td>
<td>123456ABC</td>
<td>TX</td>
</tr>
</tbody>
</table>

• You may remove any of the licenses by clicking the red “X” button beside the license
• Now click “Save”, to save any changes

**Classes and Testing**

**How to View Your Classes**

• Click “My Classes” in the menu

For those healthcare providers taking education provided by an employer who has set an education curriculum the education summary is as follows:
“My Education Summary” shows you the contact hours in our system which is the amount of continuing education hours you have completed with Pedagogy.

“Current Hours” are expected hours you will receive based on the current education plan set by your employer.

“Last Login” will indicate the last time you logged into your dashboard.

“Next Due Date” will inform you of the date you are expected to complete the next class in your education plan.

- To open a class, click on the title.

### Pending Classes

<table>
<thead>
<tr>
<th>Class Name</th>
<th>CEU</th>
<th>Next Action</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>CPR</td>
<td>2.00</td>
<td>Continue</td>
<td></td>
</tr>
<tr>
<td>Transfusion Therapy</td>
<td>4.00</td>
<td>Complete Test</td>
<td></td>
</tr>
</tbody>
</table>

- The certificates drop down will allow you to print the certificates for the classes you have completed.

### Certificates

- Click the drop down, select the class and click “Print Certificate.”
- Your certificate will open in a new window for you to print.
- Next, select the “Pending Classes” tab

<table>
<thead>
<tr>
<th>Class Name</th>
<th>CEU</th>
<th>Paid</th>
<th>Print</th>
<th>Score</th>
<th>Last Activity</th>
<th>Next Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>CPR</td>
<td>2.00</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>03/26/2014</td>
<td>Continue</td>
</tr>
<tr>
<td>Transfusion Therapy</td>
<td>4.00</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>03/26/2014</td>
<td>Complete Test</td>
</tr>
</tbody>
</table>

- This page will show if the class has been paid for, if your certificate has been printed, if you passed the test, your score, last date of activity, and the next action needed to complete the class
- Next click the “Completed Class” tab

<table>
<thead>
<tr>
<th>Class Name</th>
<th>CEU</th>
<th>Print</th>
<th>Score</th>
<th>Last Activity</th>
<th>Completed</th>
<th>Expires</th>
</tr>
</thead>
<tbody>
<tr>
<td>How To Pedagogy</td>
<td>0.00</td>
<td>✓</td>
<td>100.00</td>
<td>03/26/2014</td>
<td>03/26/2014</td>
<td></td>
</tr>
<tr>
<td>How To Pedagogy</td>
<td>0.00</td>
<td>✓</td>
<td>100.00</td>
<td>03/26/2014</td>
<td>03/26/2014</td>
<td></td>
</tr>
</tbody>
</table>

- This section will show you all of the classes you have completed
- The “Expires” column will show you the date this class is no longer available in your education plan
- Next click the “Archived” tab
- This page will show you any classes that you have completed that are no longer available, or if the class has passed its expiration date
- “Expired” means the class has passed the date that has been set for you to complete the class

**How to Take a Class**
- Click “My Classes” in the main navigation menu at the top of the page
- This page contains the list of classes that are currently assigned to you
- Select a class from your list by clicking on the class title

### My Education Summary
- Contact Hours (in system): 0.00
- Current Hours (based on plan): 0.00
- Last Login: 12/12/2011
- Next Due Date (based on plan)

### Pending Classes (Click to open class)

<table>
<thead>
<tr>
<th>Class Name</th>
<th>CEU</th>
<th>Next Action</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>CPR</td>
<td>2.00</td>
<td>Start Class</td>
<td></td>
</tr>
<tr>
<td>How To Pedagogy</td>
<td>0.00</td>
<td>Start Class</td>
<td></td>
</tr>
</tbody>
</table>

- Select a chapter and begin reading

### Chapter Listing
- Changes in 2010
- BLS/CPR for Adults – 1 Rescuer
- 2 – Rescuer CPR for an Adult
- Automated External Defibrillator (AED)
- BLS And CPR Ages 1 to Puberty
- BLS/CPR for Infants
- Advanced Airway CPR, Mouth-to-Mouth Breaths, and Rescue Breathing
- Choking

- You may move between chapters by selecting a chapter in the “Chapter Listing” box to the left
- Each page can be read out loud to you by clicking the “Play” button in the menu above
• Click play and the page will be read to you. This feature is available on every class page
• To go to a new page click the “Next” or “Previous” buttons or press the right or left arrows on your keyboard

• Your progress is displayed in the “Class Progress” box to the left along with any available actions for your class

• Here you may also switch to a printable version of the class if you purchased the print option. The print option displays course content only, without review or exam questions
• At the end of each chapter are review questions, answer these questions to check your understanding of the previous chapter

CPR for the Healthcare Professional
Changes in 2010
The new method used to complete the BLS sequence is ________.

A. CAP  B. ABC  C. BAC  D. CAB

Incorrect
Click here to see the reference page for this question.
CHECK ANSWER
• If the question has been answered incorrectly a link to the reference page will be given below the red “Incorrect”
• You may go to the page and review the content for the correct answer, click the “Back to Review Question” link to return and answer the question correctly
• While taking your class you may notice red highlighted words

- Hover the mouse on the word to view a short description
- Click on the word to view a full description on a new page and in some cases an image is provided
- If you find a problem within the class, click the “Report a Problem” link at the top right of the page

- A pop up will appear where you may describe the problem
• Click the “Submit” button to submit the problem, or click “Never mind” to close the window
• To select a different class, click the “Back to My Classes” link

How to take a Test
• Select a class from your “My Classes” list, then click the “Take My Test” button in the navigation menu at the top of the page

• The test is broken up into sections – each section corresponds to a chapter of the class. To choose between the sections, click the name in the “Test Sections” box. You may review how much of the test you have completed, each section that is completed will have a check mark next to it

• Answer the question by selecting an answer choice and clicking either “Save” or “Save and Continue”
BLS/CPR for Adults – 1 Rescuer

When attempting to rescue an adult victim alone, it is advisable to leave the victim to activate the emergency response and grab an AED prior to beginning CPR.

- A. True
- B. False

“Save” will save your answer choice, and allow you to see the choice you have made
“Save and Continue” will save your answer choice and send you to the next question
You do not have to complete the test all at one time. You may read one chapter and then take the corresponding test questions
You may return to the test at any time by clicking the “Take My Test” button in the navigation

Your test progress is displayed in the “Test Progress” box at the top left of the page

Here you may see how many of the test questions you have answered as well as your available actions
After completing the test, click “Submit My Test For Scoring” under available actions
Your score will be shown above the available actions list
• If you scored an 80% or above, click the “Evaluate My Class” link under available actions. Your course evaluation must be completed before you can print your class certificate
• Answer the first five questions by rating on a scale from “1. Did not meet my expectations” to “5. Far exceeded my expectations”

**Scale**

1. Did not meet my expectations
2. Somewhat met my expectations
3. Met my expectations
4. Somewhat exceeded my expectations
5. Far exceeded my expectations

* marks where an answer is required

<table>
<thead>
<tr>
<th>Questions</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Class Content and Materials provided by Pedagogy</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Teaching Methodology and Structure</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Web Site and Class Delivery</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Specific Objectives Detailed in Curriculum</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Ease of Use of Testing Interface</td>
<td>1 2 3 4 5</td>
</tr>
</tbody>
</table>

• Then complete the following questions based on your experience

**Please provide us any further input or suggestions to improve Pedagogy training in these areas:**

What did you like most about this class?

What can we do to improve the class?

Would you recommend us to an associate?  

Would you like to give us permission to reproduce your comments about this class on the website?  

These comments will be anonymous.

Submit

• When you are done, click “Submit”
• You will be taken back to your test menu, click on the “Print My Certificate” link in “Available Actions”
• Your certificate will open in a new window for you to print
• We recommend you print two copies one for your personal records and one for your facility
• Now you may review the questions you got incorrect by clicking “Review Wrong Answers”
Managing a Facility

How to Manage a Facility

- To manage facilities, click “Manage” in the menu

Manage Your Facility Information

- Here you can edit the facility name, address, city, state, postal code and contact information

- Be sure to click “Save” to save any changes you make

Manage Your Facility Preferences

- To change facility preferences, click on the “Facility Preferences” tab above “Facility Information”
- Facility preferences includes three choices:
“Allow staff members to choose classes from the list of purchased classes”
  - We do not recommend turning this preference on, as it allows your students to assign themselves classes from your buckets without your approval

“Email Monthly Progress Report”
  - This preference will enable a monthly email to be sent to you with an update on the progress of all of the students in your facility

“Automatically assign ‘How to Pedagogy’ to new staff”
  - This preference is currently enabled on all accounts regardless of your selection

Now activate any preference by checking the appropriate box, and click on “Save” to store any changes

Manage Your Facility’s Registered Courses (Ordering Classes)
- To view your current purchased classes and order new classes, click on “Registered Classes”

- From this page you can manage the enrollment of your facility staff in each class, manage your buckets of classes, and order new classes
The “Turnover” column, signifies courses that have been started but the staff member no longer works in your facility.

Any courses in your “Unused” column are available to be assigned to your staff.
- To assign a class, select the class and click the “Manage Enrollment” link to the right.
- On this page you may assign facility staff classes or remove unused classes.

CLASS ENROLLMENT

<table>
<thead>
<tr>
<th>Name</th>
<th>Status</th>
<th>Locked</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jane Nurse</td>
<td>Not Assigned</td>
<td>Unlocked</td>
<td></td>
</tr>
<tr>
<td>John LastName</td>
<td>Not Assigned</td>
<td>Unlocked</td>
<td>Facility</td>
</tr>
<tr>
<td>Nancy Admin</td>
<td>Not Started</td>
<td>Unlocked</td>
<td>Facility</td>
</tr>
</tbody>
</table>

- Click the “+” icon to assign a class or the “X” icon to remove that class from a staff member.
- A class may not be removed from a staff member if it is locked.
- The status of the class shows whether the staff member has completed the class, is in progress of taking the class, or has not started the assigned class.
- Click “Back to Facility” to return to your “Facility Management” screen.

ORDER CLASSES

<table>
<thead>
<tr>
<th>Class</th>
<th>Price</th>
<th>Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ambulation and Preventing Falls</td>
<td>$40.00</td>
<td>5</td>
</tr>
</tbody>
</table>

- To order new classes for your facility click the “Order Classes” button.

Order Total: $40.00
Discount: $0.00
Your Price: $40.00

10 or more classes receives a 10% discount off the entire order.

SUBMIT ORDER
Select a class from the “Class Catalog" drop down, enter the number of classes in the “Quantity" field, and click the “Add to Order” button. The class name, price, and number of unites will be displayed below, and the order total will be updated. You may add as many classes to this list as you need by repeating the same steps. Orders with 10 or more classes will receive a 10% discount off the entire order, which will be applied in the totals automatically. Use the VCR buttons to navigate through your order. To change how many classes are displayed per page, click the “Page size” drop down and select a different number. When you have added all the classes to your order, check the order total, then click the “Submit Order” button below the grid to place your order. Pedagogy receives notification of your order and an invoice will be generated and emailed to you.

Manage Your Facility Staff Accounts
- To manage facility staff, click “Facility Staff”

- To find a specific staff member enter a first name or a last name into the search box and click “Apply Filters”
- Click the “X” icon beside the staff member’s name to remove them from this facility
- To create a new staff member, click “New Facility Staff” to the right of the search box
- Enter the staff’s first and last name and click “Save” to create the staff member
- If you have their license number, enter the license type, number, and state below and click “Add”. This step is optional.

- Be sure to click “Save” at the bottom of the page after making changes to a staff member’s license information or facility so that it updates the system
- To edit or update a staff password – click the “Change User Password” button. A pop up will appear, enter the new password, and confirm it. Click the “Save” button to save the password
To make a staff member a facility administrator, click on “Administration Information” and check the box next to their facility.

If the staff member needs to be granted an “Approval” role for course purchases, click the “Accounting Information” tab and check the box next to the facility the staff member should approve orders for. Approval roles are for those facilities that require a second approval for course orders that have been placed.

Manage Staff Certificates
- To print a PDF with certificates for multiple staff members, click on the “Print Certificates” tab on the facility menu.

Check the box next to the name of any staff member you would like to print certificates for.
- Click “Download Selected Staff Certificates” you will then download a set of PDF files with **all available certificates** for the staff members selected. Large file downloads may take a minute to generate.

**Manage Facility Education Plans**
- Education plans offer a way for you or your corporation to manage your students and their classes at the top level. You can select a set of classes that staff with particular license types will all be assigned based on their license type.
- If your facility is part of a corporation that has established an education plan for all facilities these corporate templates will also be available.
- Click on the “Education Plans” link below the main menu bar at the top of the page.

**MANAGE FACILITIES**

- The actual education plan used to manage your classes is always created at the facility level.
- A simple four step process is used to create, define, and save your plan in the system.
- To create a new education plan, click “New Education Plan.”

**EDUCATION PLANS**

- Your facility will be pre-filled in the “Select Facility” drop down.
• If you manage more than one facility, select the facility you are creating this plan for from the “Select Facility” drop down menu
• If you want to use a corporate template as a starting point, select from the “Use Existing Corporate Plan” drop down

Use Existing Corporate Plan (Optional)
ExampleCorp RN Education

• Using an existing corporate plan will pre-load the corporate plan into the following steps
• Give your plan a name, for example “LVN Education” or “RN Education”
• Click “Proceed to Step 2” to continue to the next step
• You can click “Save” at any time to save your plan and come back to it later
• Step 2 is where you add classes to the plan
• Every class Pedagogy offers can be selected as part of an education plan
• You can define your list, and our system will let you know if you have enough classes in your buckets to meet your needs or if you need to order refills to meet your plan
• To add classes to your plan, click the “Add Class(es)” button
• A pop up will appear with a listing of all of the Pedagogy classes

All classes are listed alphabetically and you may need to go to the next page to find a class
Check the box next to all classes you would like added to your plan, then click “Apply”
The classes you selected will now be displayed below the “Add Class(es)” button
• If you want to remove a class from a plan, click the “X” icon next to the class you wish to remove, a pop up will appear to ask if you are sure, click “OK” to confirm
• The “Available” column will show how many classes you currently have in your bucket and available to assign
• If this number is 0 or less than the number of staff you want enrolled you will need to order more classes to refill your buckets
• The bottom of this step has an option “Auto-Upgrade to New Class Versions?”
• Pedagogy reviews course content on a six month to one year basis and will occasionally upgrade class versions to follow the most current standards of practice
• Select “Yes” if you would like all of the classes in your plan to automatically upgrade to the most current version of the class (you will be able to select this on a class by class basis in a later step)

Auto-Upgrade to New Class Versions?

- Yes  
- No

• Once you have added all of the classes you need to the plan, click the “Proceed to Step 3” button
• Click the “Add License Type(s)” button to open a list of available license types

Check the box beside all license types you wish this plan to assign to, then click “Apply”
• Once you have added all license types, select “Yes” or “No” if you would like this plan to be automatically assigned to any staff with these license types
• You may also assign the education plan to “All Staff”
Click “Proceed to Step 4” to move on
Step 4 will allow you to alter the how this plan is enforced
You will see a list displayed of each of the classes included in the plan, and the preferences can be different for any of the classes
For example if you require your staff to complete their Infection Control classes every six months, but the rest of their classes every year, the settings can be changed accordingly

The up and down arrows under “Sequence” allow you to change the order that your staff complete their classes in
“Warning Days” allows you to determine how many days the student has to complete the class before they receive a warning email reminding them to complete their class
“Alert Days” determines the number of days the staff member has to complete the class before an email is sent to the Facility Administrator notifying them that the class has not been completed
“Duration” is where you can select how often the student is required to complete the class
- For example, if the facility staff in our example needed to complete Adult Pain Management every 6 months, we would change the duration to “180” and the student would have their old class archived, and a new class reloaded every six months.
- The “New Version” option allows you to select on a class-by-class basis if you would like the class to auto-upgrade to the most current version available.
- “Available” is displaying the number of classes you have available to assign for each of the classes in the plan. If this number is 0 or less than the number of staff in your facility that you will have assigned to this plan, you will need to [order more classes](#).
- To begin assigning your plan to staff, select “Enable”.
- You may also “Disable” any plans that have become outdated or need to be temporarily put on hold.
- There is a key to the right of the page, that will have explanations of this page for your use.
- Once you have selected all of your enforcement preferences, click “Save/Finish” at the bottom of the page.
- You will be brought to the “Assign Students” page.
- This page will load with any available staff that have the license type you selected for the plan.
- You can manually add and remove staff from this plan by using the “+” or “X” buttons or you can click on “Auto Assign Based on License Type” to assign this plan to all staff of this license type.
- Note: If you click on “Auto Assign Based on License Type” but do not have enough classes, a pop up will appear to explain which classes, and how many of each class are missing.

![Error](image)

- Click the “Click Here” link and you will be brought directly to the order classes page.
- For information on how to order classes, [Click Here](#).
- Once you have completed your assignments, you can return to manage other education plans by clicking on the “Back to Education Plans” button at the top right of the screen.
Reports

- Pedagogy compiles all staff progress in all of their classes into easy to use reports
- To access the reports page, click on “Reports” in the main navigation menu at the top of the page

You can then click on “Progress Report” or “Compliance Report”

Progress Reports

- The “Progress Report” page will display a list of all classes currently completed by your facility staff

If you manage more than one facility, you can filter the list by the “Facility” drop down to display staff from one facility at a time
- You can sort the report by class by using the “Class” drop down menu
- “Status” refers to if the class has been started, is in progress, or is completed by the staff member
- You can sort the report by class status by using the “Status” drop down
• For each class, it will show the student’s name, their status for that class, their test score if they have completed the test, and the last date they accessed the class
• To view the progress for a specific student, click the “Student” drop down and select the student by name
• Use the VCR buttons at the bottom of the report to move between pages of the report
• You can export this report to different programs using the 3 buttons at the top right of the report
  o The first button will download the report as an Excel file
  o The second button will download the report as a PDF file
  o The third button will download the report as a CSV file

**Compliance Reports**

• To access a compliance report, click on the “Compliance Report” tab under the “Reports” page
• This page will allow you to track your staff’s compliance to the education plans you have created for them

![Compliance Report](image)

• You can choose which education plan you would like to view the report for from the “Select Education Plan” drop down
• This report allows you to add additional filters by dragging the group type to the bar at the top of the report
• For example, to group your report according to the staff member within the education plan, click on “Name” in the header, and drag it to the grey bar
• You will see a down and up arrow appear next to the “Drag a column header and drop it here to group by that column” box, drop the header there and your results will reload according to the new header grouping
• Click the up or down arrow next to the column headers to change if they are sorted in order from A-Z or Z-A
The compliance report will display the name of the student, the classes the student has been assigned from the education plan, the date the classes were assigned to the student, the date they completed the classes, their current status for each class in the plan, and the date that the class expires.

You can export this report to different programs using the 3 buttons at the top right of the report:
- The first button will download the report as an Excel file
- The second button will download the report as a PDF file
- The third button will download the report as a CSV file

Additional Resources

Pedagogy offers many resources for you or your staff. If at any time you have a question that is not answered in our resources, Contact Us and our staff will be more than happy to help.

Informational Resources

To access any of Pedagogy’s resource pages, open a web browser and go Pedagogy Education and select the campus that best fits your needs.

The campuses we offer are:

- Main Campus
- Acute Care Campus
- Infusion Campus
- Inservice and Compliance Campus
- Long Term Care and Home Health Campus
- Administrators Campus
Once you have loaded the campus, click on the “Resource Library” tab in the navigation menu at the top of the page.

From this page a list of resources by category will be displayed, including printable reference posters, and other information.

Pedagogy also offers current news and blog posts with additional information for your use in our “Student Union” section.

**How to Videos**
There are “How To” videos accessible in your portal at any time. To access the “How To” videos:

- Log into your dashboard
- Click on “How To” in the main navigation menu and you will be brought to the videos page
- Choose the category of your question in the drop down menu
- A list of available videos will be displayed
- Click on the name of a video you would like to watch, and the video will load within your dashboard page