

# Managing Your Subscription

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# **Account Management**

This section includes step-by-step instructions for managing your account and subscription details for Skill.Set.Go.™.

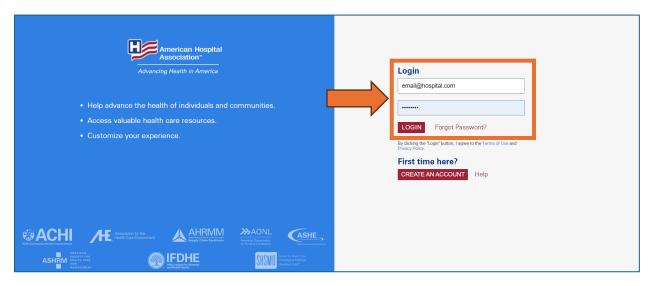
#### How to Access

To access your account:

- 1. In a web browser, navigate to <a href="https://ahe.org/skillsetgo">https://ahe.org/skillsetgo</a>.
- 2. Scroll down and select "MANAGE MY SUBSCRIPTION".

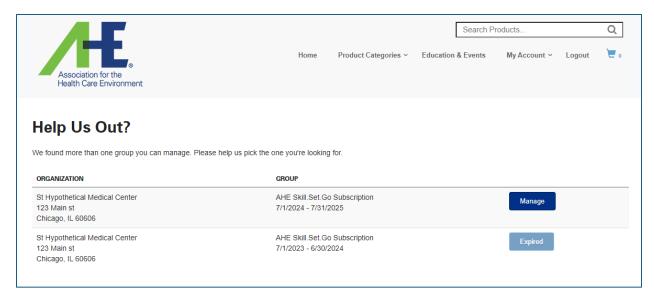


3. Enter your username and password, then click "LOGIN".

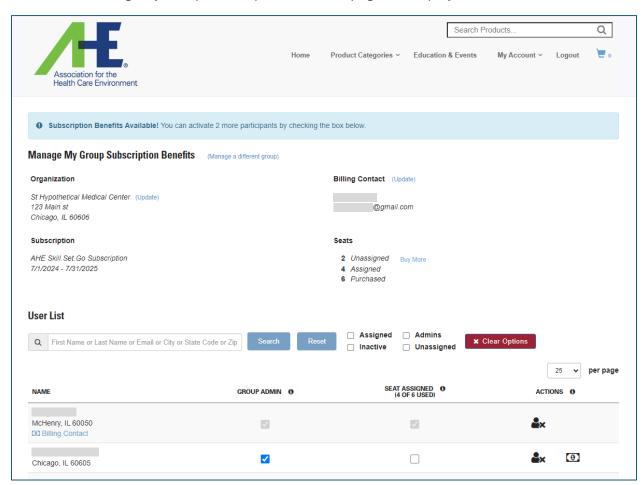


Note: If it is your first time accessing your account, you may need to click "CREATE AN ACCOUNT" and follow the instructions provided on the screen.

4. If necessary, select the group you want to manage.



5. The "Manage My Group Subscription Benefits" page will display.



### Overview

The "Manage My Group Subscription Benefits" page is the hub for subscription management.

#### **Subscription Overview**

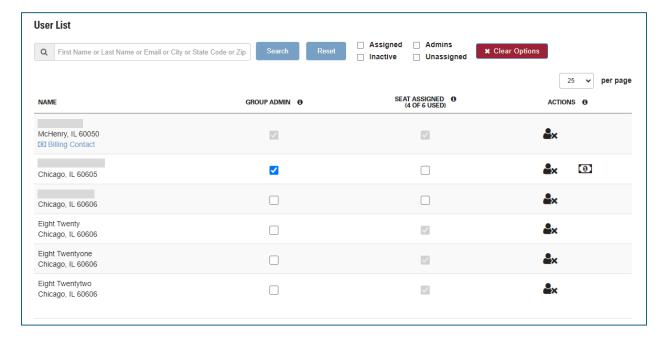
This section displays an overview of your subscription:

- Organization The facility to which your subscription is tied.
- Subscription The active period for your subscription.
- Billing Contact The person (name and email address) to whom AHE will direct billing inquiries and communications.
- Seats Number of seats available for assignment (Unassigned), number of seats currently in use (Assigned), and total number of seats under subscription (Purchased).



#### **User List**

This section displays all users managed under this subscription. The list of users can be filtered to quickly view an individual user, or a group of users with a shared characteristic (e.g. all Admins).



#### Understanding the User List

#### Important terms:

- Group Admin A person responsible for creating an organizational group and assigning learners to "seats". Group Admin will have access to their learners' progress and will have the ability to run reports in the Learning Center.
- Seat Having a "seat" assigned means that the user has access to the Skill.Set.Go.™ course content. Any user without a seat will be able to log in to Skill.Set.Go.™, but they will not be able to access courses.
- Billing Contact This person will receive communications regarding the billing of this subscription from AHE.

#### **How to Read the User List**

Each user has is included in the User List. To determine their status, you can refer to the checkmarks and icons in the User List table.

The examples show how to determine user information based on the User List.

#### Example 1

- User is a Group Admin
- User has seat assigned (they can access the Skill.Set.Go.™ course content)
- User is listed as Billing Contact ("Billing Contact" is displayed under name)



#### Example 2

- User is a Group Admin
- User *does not* have a seat assigned (they *cannot* access the Skill.Set.Go.™ course content, only the dashboard where they can monitor team members' progress)
- User is eligible to be set as Billing Contact (dollar bill icon under the Actions column)



#### Example 3

- User is not a Group Admin
- User has seat assigned (they can access the Skill.Set.Go.™ course content)



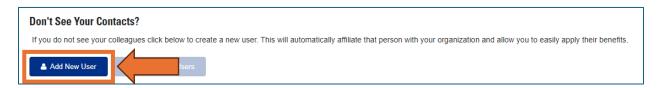
# Adding/Removing Users

Users can be added or removed at any time. For convenience, users can be added one at a time or in bulk.

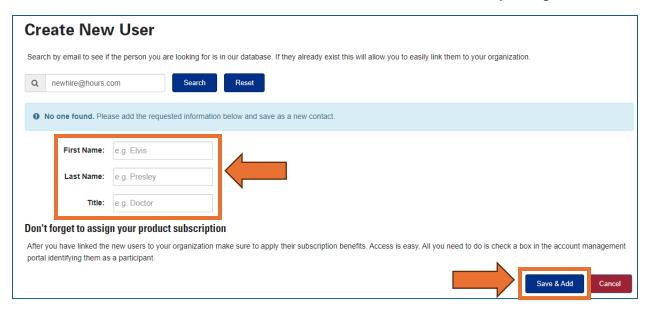
Note: Adding a user is not the same as assigning a seat.

#### Add New User (Individual)

- 1. Navigate to the "Manage My Group Subscription Benefits" page and scroll to the bottom.
- 2. Under "Don't See Your Contacts?" select "Add New User".



- 3. Search for the individual's email address to ensure you are not creating a duplicate record.
  - a. If no record is found, enter the user's first name, last name, and title. Click "Save & Add".
  - b. If a record is found, click "Save & Add" to affiliate the user with your organization.



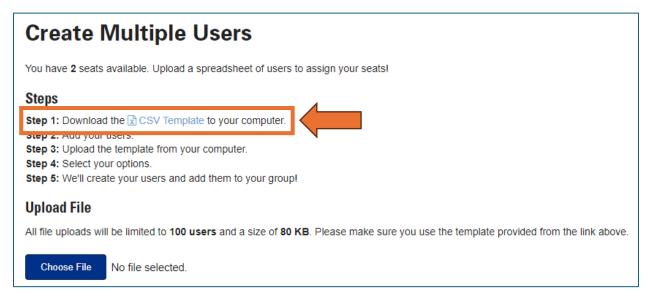
4. The user will now appear in the User List. (not pictured)

#### Add Multiple Users

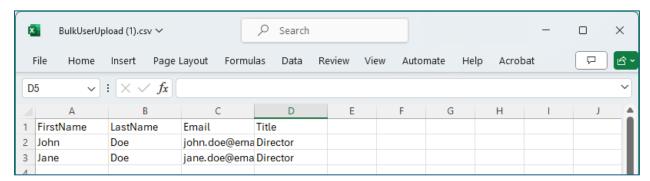
- 1. Navigate to the "Manage My Group Subscription Benefits" page and scroll to the bottom.
- 2. Under "Don't See Your Contacts?" select "Add Multiple Users".



- 3. The "Create Multiple Users" page will display.
- 4. Click the "CSV Template" link to download the spreadsheet template you will fill out to add your users.



- 5. Open the spreadsheet file and complete the information for each user. The users will be created exactly as you enter them, so be sure to check spelling and formatting.
- 6. When finished, save the file.

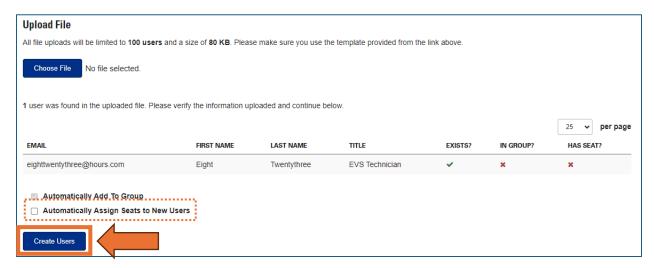


- 7. Return to the "Create Multiple Users" page and select "Choose File". Select the completed spreadsheet from your files.
- 8. The file name will display next to the "Choose File" button. If the correct file name is displayed, select "Upload File."



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- 9. A summary of the uploaded users will display.
  - a. If you would like to assign seats to all new users, check the box next to "Automatically Assign Seats to New Users". **This action cannot be undone.**
  - b. If you would like to assign seats individually, leave the box unchecked.
- 10. Select "Create Users".



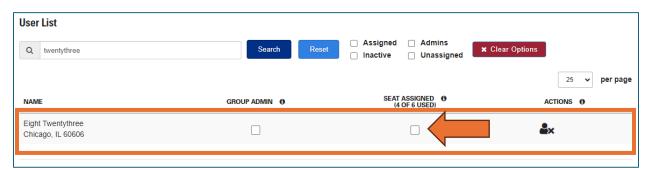
11. The list will update to show the status of the new users.



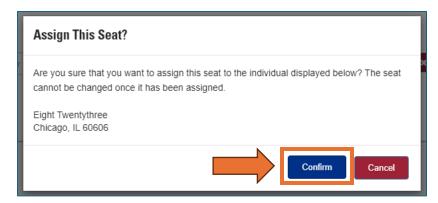
# **Assigning Seats**

Skill.Set.Go.™ seats are non-transferrable. Once a seat is assigned, it is tied to that user and cannot be removed for the remainder of the subscription period.

- 1. Navigate to the "Manage My Group Subscription Benefits" page and scroll to the User List section.
- 2. Find the appropriate user(s). When you locate the user(s), select the checkbox under "Seat Assigned".



3. A confirmation message will appear. Select "Confirm" to assign the seat.



# Other Roles (Group Admin & Billing Contact)

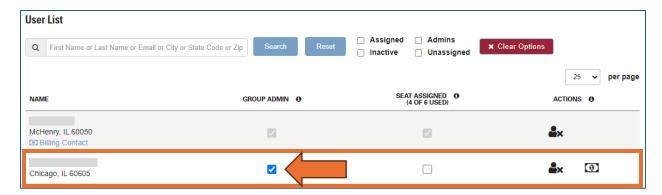
#### **Group Admin**

Groups may have multiple Group Admins. These individuals can assign learners to "seats", view learners' progress and run reports in the Learning Center.

This role can be added to, or removed from, any user at any time.

To assign this role:

- 1. Navigate to the "Manage My Group Subscription Benefits" page and scroll to the User List section.
- 2. Find the appropriate user(s). When you locate the user(s), select the checkbox under "Group Admin".



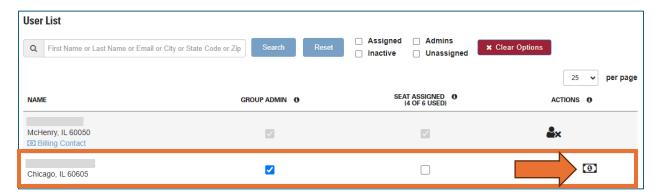
#### **Billing Contact**

Groups may only have one Billing Contact. This person will receive any communication from AHE regarding billing for this subscription. The Billing Contact must also be a Group Admin.

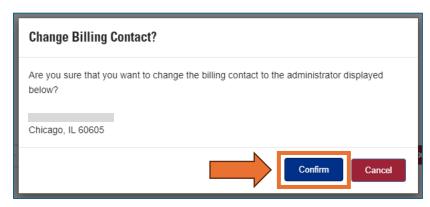
To assign this role:

1. Navigate to the "Manage My Group Subscription Benefits" page and scroll to the User List section.

- 2. Find the appropriate user. When you locate the user, ensure they are currently a Group Admin. Assign the Group Admin role if necessary.
- 3. Select the dollar bill icon next under the "Actions" column.



4. A confirmation message will appear. Select "Confirm" to set this user as the Billing Contact.



5. "Billing Contact" will now appear under the user's name in the User List.



#### Renewal

The renewal link will become available 60 days prior to your subscription end date. While it is recommended to renew while your subscription is still active in order to preserve learner progress, the option to renew will remain available after the subscription period has ended.

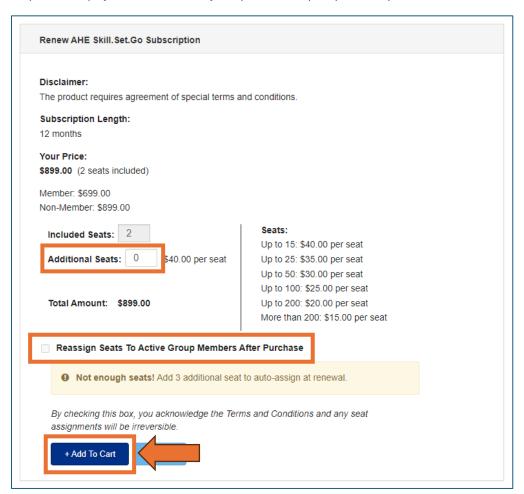
1. Navigate to the "Manage My Group Subscription Benefits" page.

### **Skill.Set.GO.** Managing Your Subscription

2. Under the Subscription section, select "(Renew)".



- 3. Select the total number of seats you would like to purchase for the next subscription period.
- 4. If you would like to reassign seats to your active group members, select the highlighted checkbox. If you would like to assign seats individually, leave this box unchecked.
- 5. When you have made your selections, click "+Add to Cart".
- 6. Complete the payment to finalize your purchase. (not pictured)



# Team Dashboard

This section includes step-by-step instructions for accessing and using the Team Dashboard as a Group Admin.

#### How to Access

To access the Team Dashboard:

- 1. Navigate to <a href="https://www.ahe.org/skillsetgo">https://www.ahe.org/skillsetgo</a>.
  - a. If you are already logged in, select "My Learning".
  - b. If you are not logged in, first select "Register / Log In", then return to this page and select "My Learning".



c. You may also scroll down and select "Leaner Login".



2. The "Welcome" page will display. Select "Go to My Team Dashboard".



3. The "My Team" dashboard will display. (not pictured)

### Overview

The "My Team" dashboard is the hub for monitoring learners' progress through Skill.Set.Go.™ content.

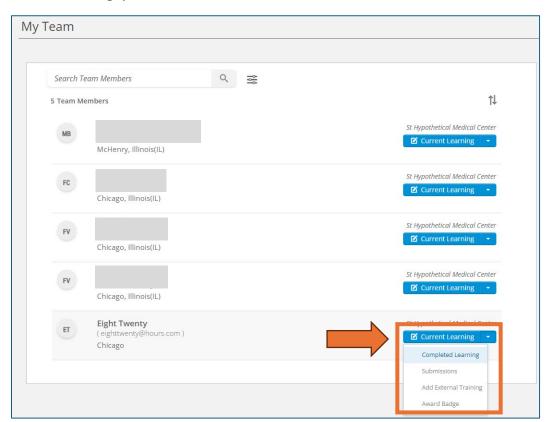
From this page, you can:

- View a list of all team members
- View recent updates
- View a summary of course completions
- Create team reports

# Viewing Individual Progress

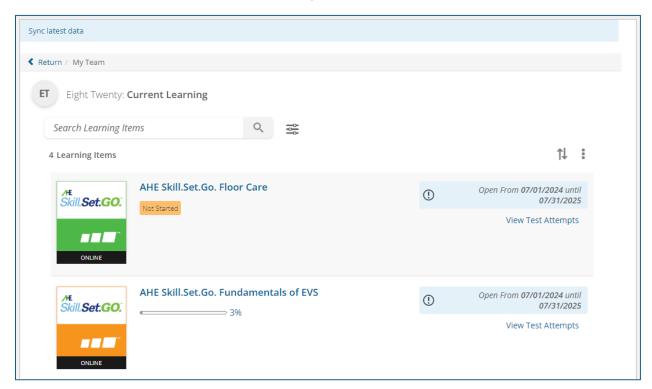
To view course progress for an individual learner:

- 1. Navigate to the "My Team" dashboard.
  - 2. Locate the appropriate team member in the Team Members list.
  - 3. Select the option you want to view:
    - a. Current Learning Displays a list of the coursework this user is currently enrolled in, excluding completed courses.
    - b. Completed Learning Displays a list of the courses that the user has previously completed. (To access this option, click the dropdown arrow next to "Current Learning".)



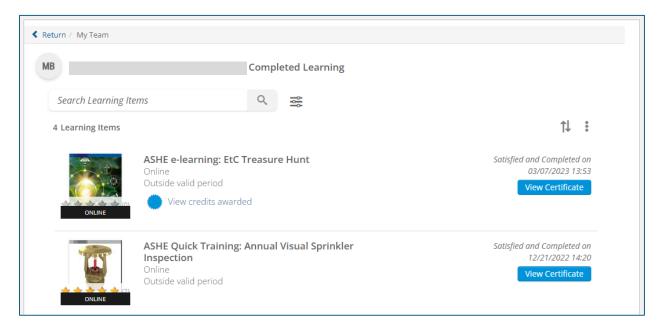
# **Current Learning**

This view allows you to track an individual's progress in all active, incomplete courses.



# **Completed Learning**

This view allows you to view previously completed courses and any related certificates.



# Viewing Team Progress

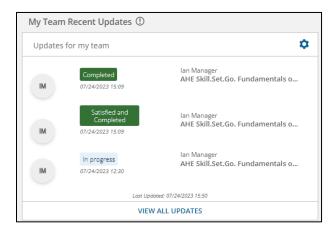
There are multiple options for viewing and tracking team progress on the "My Team" dashboard.

# My Team Recent Updates

To catch up on recent progress for your entire team:

- 1. Navigate to the "My Team" dashboard.
- 2. On the right side of the screen, locate the "My Team Recent Updates" section.

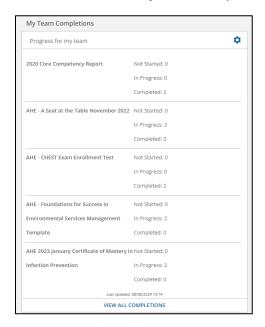
This section will display recent updates on your team members' progress including when a user begins a course or completes it.



# My Team Completions

To view a summary of course completion rates:

- 1. Navigate to the "My Team" dashboard.
- 2. On the right side of the screen, locate the "My Team Completions" section.



This section displays all courses in which any team members are enrolled, as well as the completion rates for those courses. For each course, you will see a breakdown of the following information:

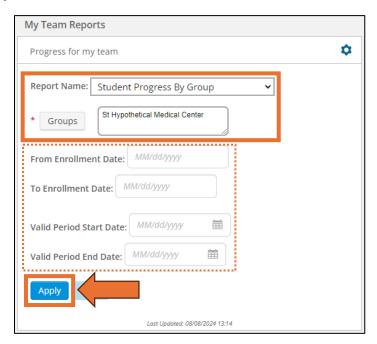
- Not Started Number of team members who have not started the course.
- In Progress Number of team members who have started the course, but have not finished it.
- Completed Number of team members who have completed the course.

Note: Only the first five courses (listed alphabetically) will appear in this view. To view all courses, select "VIEW ALL COMPLETIONS" at the bottom of the "My Team Completions" section.

### **Running Reports**

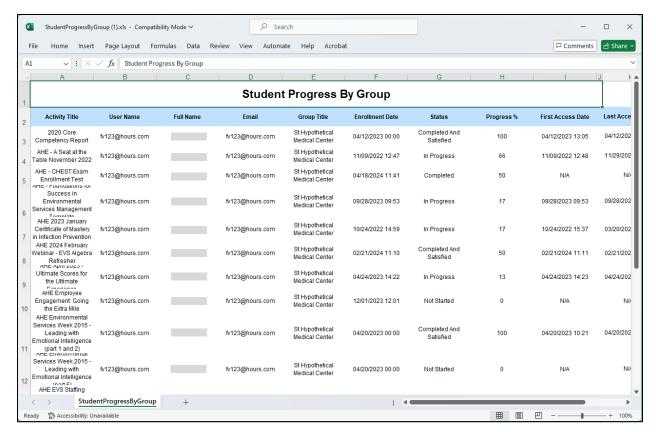
Downloadable reports are available for Group Admins.

- 1. Navigate to the "My Team" dashboard.
- 2. On the right side of the screen, locate the "My Team Reports" section.
- 3. Select the report you would like to run:
  - a. Current Activities By Group
  - b. Student Progress By Group
  - c. Training History By Group
  - d. Training History Credits By Group
- 4. Select "Groups" to specify which user group(s) you would like to include in the report.
- 5. If desired, enter a date range for "Enrollment Date" and/or for "Valid Period".
- 6. Select "Apply".



7. The report will automatically begin downloading.

#### Example report:



# **Support**

For support regarding Skill.Set.Go.™, please email AHE@aha.org.