

# Using a Learning Management System to improve your Compliance Program

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***BE BOUNDLESS***



**Has this ever happened to you?**

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<https://youtu.be/eLfmhzT7bUM>

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## Go to App Store and install Poll Everywhere



## Why even have an LMS?

- > Healthcare is one of the top-regulated industries
- > State & Federally mandated trainings
- > Covered-entity required trainings
- > Consistency of Training
- > Tracking and Reporting
- > Cost Savings



## Poll #1

Which of these best describes your organization's current state?

- > **A. Fully Implemented, fully functional LMS across entire organization.**
- > **B. Partially implemented LMS—pockets of resistance**
- > **C. In process of implementing an LMS**
- > **D. No LMS, but may be considering one**
- > **E. No LMS, no interest in an LMS**

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## When an LMS might come in handy

- > **HIPAA Privacy investigations**
- > **Boss asks you for training stats**
- > **DOH, Joint Commission, CODA or other regulatory body asks for your training/licenses/certifications**



## Perks of having an LMS



- > Run completion reports from the comfort of your office
- > Track everything online, real-time
- > 24/7 access

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## Shopping for an LMS



- > There's over 600 LMS products in this marketplace
- > Consider hiring a qualified consultant
- > Determine your needs
  - What trainings, licenses/certifications are required?
  - What frequency?
  - What job roles are there?

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# Shopping for an LMS

## Sample Training Matrix with Job Roles

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH	AI	AJ	AK	AL	AM	AN	AO	AP	AQ	AR	AS	AT	AU	AV	AW	AX	AY	AZ	BA	BB	BC	BD	BE	BF	BG	BH	BI	BJ	BK	BL	BM	BN	BO	BP	BQ	BR	BS	BT	BU	BV	BW	BX	BY	BZ	CA	CB	CC	CD	CE	CF	CG	CH	CI	CJ	CK	CL	CM	CN	CO	CP	CQ	CR	CS	CT	CU	CV	CW	CX	CY	CZ	DA	DB	DC	DD	DE	DF	DG	DH	DI	DJ	DK	DL	DM	DN	DO	DP	DQ	DR	DS	DT	DU	DV	DW	DX	DY	DZ	EA	EB	EC	ED	EE	EF	EG	EH	EI	EJ	ЕК	EL	EM	EN	EO	EP	EQ	ER	ES	ET	EU	EV	EW	EX	EY	EZ	FA	FB	FC	FD	FE	FF	FG	FH	FI	FJ	FK	FL	FM	FN	FO	FP	FQ	FR	FS	FT	FU	FV	FW	FX	FY	FZ	GA	GB	GC	GD	GE	GF	GG	GH	GI	GJ	GK	GL	GM	GN	GO	GP	GQ	GR	GS	GT	GU	GV	GW	GX	GY	GZ	HA	HB	HC	HD	HE	HF	HG	HH	HI	HJ	HK	HL	HM	HN	HO	HP	HQ	HR	HS	HT	HU	HV	HW	HX	HY	HZ	IA	IB	IC	ID	IE	IF	IG	IH	II	IJ	IK	IL	IM	IN	IO	IP	IQ	IR	IS	IT	IU	IV	IW	IX	IY	IZ	JA	JB	JC	JD	JE	JF	JG	JH	JI	IJ	JK	KL	KM	KN	KO	KP	KQ	KR	KS	KT	KU	KV	KW	KX	KY	KZ	LA	LB	LC	LD	LE	LF	LG	LH	LI	LJ	LK	LM	LN	LO	LP	LQ	LR	LS	LT	LU	LV	LW	LX	LY	LZ	MA	MB	MC	MD	ME	MF	MG	MH	MI	MJ	MK	ML	MM	MN	MO	MP	MQ	MR	MS	MT	MU	MV	MW	MX	MY	MZ	NA	NB	NC	ND	NE	NF	NG	NH	NI	NJ	NK	NL	NM	NN	NO	NP	NQ	NR	NS	NT	NU	NV	NW	NX	NY	NZ	OA	OB	OC	OD	OE	OF	OG	OH	OI	OJ	OK	OL	OM	ON	OO	OP	OQ	OR	OS	OT	OU	OV	OW	OX	OY	OZ	PA	PB	PC	PD	PE	PF	PG	PH	PI	PJ	PK	PL	PM	PN	PO	PP	PQ	PR	PS	PT	PU	PV	PW	PX	PY	PZ	QA	QB	QC	QD	QE	QF	QG	QH	QI	QJ	QK	QL	QM	QN	QO	QP	QQ	QR	QS	QT	QU	QV	QW	QX	QY	QZ	RA	RB	RC	RD	RE	RF	RG	RH	RI	RJ	RK	RL	RM	RN	RO	RP	RQ	RR	RS	RT	RU	RV	RW	RX	RY	RZ	SA	SB	SC	SD	SE	SF	SG	SH	SI	SJ	SK	SL	SM	SN	SO	SP	SQ	SR	SS	ST	SU	SV	SW	SX	SY	SZ	TA	TB	TC	TD	TE	TF	TG	TH	TI	TJ	TK	TL	TM	TN	TO	TP	TQ	TR	TS	TU	TV	TW	TX	TY	TZ	UA	UB	UC	UD	UE	UF	UG	UH	UI	UJ	UK	UL	UM	UN	UO	UP	UQ	UR	US	UT	UU	UV	UW	UX	UY	UZ	VA	VB	VC	VD	VE	VF	VG	VH	VI	VJ	VK	VL	VM	VN	VO	VP	VQ	VR	VS	VT	VU	VV	VW	VX	VY	VZ	WA	WB	WC	WD	WE	WF	WG	WH	WI	WJ	WK	WL	WM	WN	WO	WP	WQ	WR	WS	WT	WU	WV	WW	WX	WY	WZ	XA	XB	XC	XD	XE	XF	YG	YH	YI	YJ	YK	YL	YM	YN	YO	YP	YQ	YR	YS	YT	YU	YV	YW	YX	YY	YZ	ZA	ZB	ZC	ZD	ZE	ZF	ZG	ZH	ZI	ZJ	ZK	ZL	ZM	ZN	ZO	ZP	ZQ	ZR	ZS	ZT	ZU	ZV	ZW	ZX	ZY	ZZ	AA	AB	AC	AD	AE	AF	AG	AH	AI	AJ	AK	AL	AM	AN	AO	AP	AQ	AR	AS	AT	AU	AV	AW	AX	AY	AZ	BA	BB	BC	BD	BE	BF	BG	BH	BI	BJ	BK	BL	BM	BN	BO	BP	BQ	BR	BS	BT	BU	BV	BW	BX	BY	BZ	CA	CB	CC	CD	CE	CF	CG	CH	CI	CJ	CK	CL	CM	CN	CO	CP	CQ	CR	CS	CT	CU	CV	CW	CX	CY	CZ	DA	DB	DC	DD	DE	DF	DG	DH	DI	DJ	DK	DL	DM	DN	DO	DP	DQ	DR	DS	DT	DU	DV	DW	DX	DY	DZ	EA	EB	EC	ED	EE	EF	EG	EH	EI	EJ	ЕК	EL	EM	EN	EO	EP	EQ	ER	ES	ET	EU	EV	EW	EX	EY	EZ	FA	FB	FC	FD	FE	FF	FG	FH	FI	FJ	FK	FL	FM	FN	FO	FP	FQ	FR	FS	FT	FU	FV	FW	FX	FY	FZ	GA	GB	GC	GD	GE	GF	GG	GH	GI	GJ	GK	GL	GM	GN	GO	GP	GQ	GR	GS	GT	GU	GV	GW	GX	GY	GZ	HA	HB	HC	HD	HE	HF	HG	HH	HI	HJ	HK	HL	HM	HN	HO	HP	HQ	HR	HS	HT	HU	HV	HW	HX	HY	HZ	IA	IB	IC	ID	IE	IF	IG	IH	II	IJ	IK	IL	IM	IN	IO	IP	IQ	IR	IS	IT	IU	IV	IW	IX	IY	IZ	JA	JB	JC	JD	JE	JF	JG	JH	JI	IJ	JK	KL	KM	KN	KO	KP	KQ	KR	KS	KT	KU	KV	KW	KX	KY	KZ	LA	LB	LC	LD	LE	LF	LG	LH	LI	LJ	LK	LM	LN	LO	LP	LQ	LR	LS	LT	LU	LV	LW	LX	LY	LZ	MA	MB	MC	MD	ME	MF	MG	MH	MI	MJ	MK	ML	MM	MN	MO	MP	MQ	MR	MS	MT	MU	MV	MW	MX	MY	MZ	NA	NB	NC	ND	NE	NF	NG	NH	NI	NJ	NK	NL	NM	NN	NO	NP	NQ	NR	NS	NT	NU	NV	NW	NX	NY	NZ	OA	OB	OC	OD	OE	OF	OG	OH	OI	OJ	OK	OL	OM	ON	OO	OP	OQ	OR	OS	OT	OU	OV	OW	OX	OY	OZ	PA	PB	PC	PD	PE	PF	PG	PH	PI	PJ	PK	PL	PM	PN	PO	PP	PQ	PR	PS	PT	PU	PV	PW	PX	PY	PZ	QA	QB	QC	QD	QE	QF	QG	QH	QI	QJ	QK	QL	QM	QN	QO	QP	QQ	QR	QS	QT	QU	QV	QW	QX	QY	QZ	RA	RB	RC	RD	RE	RF	RG	RH	RI	RJ	RK	RL	RM	RN	RO	RP	RQ	RR	RS	RT	RU	RV	RW	RX	RY	RZ	SA	SB	SC	SD	SE	SF	SG	SH	SI	SJ	SK	SL	SM	SN	SO	SP	SQ	SR	SS	ST	SU	SV	SW	SX	SY	SZ	TA	TB	TC	TD	TE	TF	TG	TH	TI	TJ	TK	TL	TM	TN	TO	TP	TQ	TR	TS	TU	TV	TW	TX	TY	TZ	UA	UB	UC	UD	UE	UF	UG	UH	UI	UJ	UK	UL	UM	UN	UO	UP	UQ	UR	US	UT	UU	UV	UW	UX	UY	UZ	VA	VB	VC	VD	VE	VF	VG	VH	VI	VJ	VK	VL	VM	VN	VO	VP	VQ	VR	VS	VT	VU	VV	VW	VX	VY	VZ	WA	WB	WC	WD	WE	WF	WG	WH	WI	WJ	WK	WL	WM	WN	WO	WP	WQ	WR	WS	WT	WU	WV	WW	WX	WY	WZ	XA	XB	XC	XD	XE	XF	YG	YH	YI	YJ	YK	YL	YM	YN	YO	YP	YQ	YR	YS	YT	YU	YV	YW	YX	YY	YZ	ZA	ZB	ZC	ZD	ZE	ZF	ZG	ZH	ZI	ZJ	ZK	ZL	ZM	ZN	ZO	ZP	ZQ	ZR	ZS	ZT	ZU	ZV	ZW	ZX	ZY	ZZ	AA	AB	AC	AD	AE	AF	AG	AH	AI	AJ	AK	AL	AM	AN	AO	AP	AQ	AR	AS	AT	AU	AV	AW	AX	AY	AZ	BA	BB	BC	BD	BE	BF	BG	BH	BI	BJ	BK	BL	BM	BN	BO	BP	BQ	BR	BS	BT	BU	BV	BW	BX	BY	BZ	CA	CB	CC	CD	CE	CF	CG	CH	CI	CJ	CK	CL	CM	CN	CO	CP	CQ	CR	CS	CT	CU	CV	CW	CX	CY	CZ	DA	DB	DC	DD	DE	DF	DG	DH	DI	DJ	DK	DL	DM	DN	DO	DP	DQ	DR	DS	DT	DU	DV	DW	DX	DY	DZ	EA	EB	EC	ED	EE	EF	EG	EH	EI	EJ	ЕК	EL	EM	EN	EO	EP	EQ	ER	ES	ET	EU	EV	EW	EX	EY	EZ	FA	FB	FC	FD	FE	FF	FG	FH	FI	FJ	FK	FL	FM	FN	FO	FP	FQ	FR	FS	FT	FU	FV	FW	FX	FY	FZ	GA	GB	GC	GD	GE	GF	GG	GH	GI	GJ	GK	GL	GM	GN	GO	GP	GQ	GR	GS	GT	GU	GV	GW	GX	GY	GZ	HA	HB	HC	HD	HE	HF	HG	HH	HI	HJ	HK	HL	HM	HN	HO	HP	HQ	HR	HS	HT	HU	HV	HW	HX	HY	HZ	IA	IB	IC	ID	IE	IF	IG	IH	II	IJ	IK	IL	IM	IN	IO	IP	IQ	IR	IS	IT	IU	IV	IW	IX	IY	IZ	JA	JB	JC	JD	JE	JF	JG	JH	JI	IJ	JK	KL	KM	KN	KO	KP	KQ	KR	KS	KT	KU	KV	KW	KX	KY	KZ	LA	LB	LC	LD	LE	LF	LG	LH	LI	LJ	LK	LM	LN	LO	LP	LQ	LR	LS	LT	LU	LV	LW	LX	LY	LZ	MA	MB	MC	MD	ME	MF	MG	MH	MI	MJ	MK	ML	MM	MN	MO	MP	MQ	MR	MS	MT	MU	MV	MW	MX	MY	MZ	NA	NB	NC	ND	NE	NF	NG	NH	NI	NJ	NK	NL	NM	NN	NO	NP	NQ	NR	NS	NT	NU	NV	NW	NX	NY	NZ	OA	OB	OC	OD	OE	OF	OG	OH	OI	OJ	OK	OL	OM	ON	OO	OP	OQ	OR	OS	OT	OU	OV	OW	OX	OY	OZ	PA	PB	PC	PD	PE	PF	PG	PH	PI	PJ	PK	PL	PM	PN	PO	PP	PQ	PR	PS	PT	PU	PV	PW	PX	PY	PZ	QA	QB	QC	QD	QE	QF	QG	QH	QI	QJ	QK	QL	QM	QN	QO	QP	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## Shopping for an LMS

[illegible]

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## Shopping for an LMS

Which features are important to you?

- > **Skill/Certification/License tracking**
- > **Social Media Support**
- > **Security**
- > **Gamification**
- > **Brand Integration**
- > **Asynchronous Learning**
- > **And many more...**



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## Shopping for an LMS

Other considerations:

- > **Track record of company**
- > **SCORM-compliant**
- > **Availability of Customer Service**
- > **Mergers and Acquisitions**

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## Poll #2

Which of these features are important to you?

- Single Sign On
- Data Migration/Bulk Uploads
- Course creation (Bridge, eSSential, Absorb et al)
- Customizable Reporting
- Intuitive User Interface
- Ease of Use
- Skill/Certification tracking
- Support for mobile or remote learning
- Social Media Support
- Security
- Built-in Gamification Tools
- Brand Integration
- Collaborative Learning Tools
- Content management
- Asynchronous Learning
- SMS Texting

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## Implementing an LMS

Assign a project manager



- **Get to know your implementation manager/team**
- **Find out what data they need and in what format**
- **Collect all your data**
  - > Learner Name, department, hire date, etc
  - > Job Role Category
  - > Name of each Training
  - > Date(s) Completed

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## Implementing an LMS

- Verify your data is clean
- Double-check that data is clean
- Migrate your completion data
- Load your training modules
- Determine and create your training assignments
  - > Frequency
  - > To which roles it gets assigned



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## Implementing an LMS

- Test if possible
  - > Consider starting with a small group, one training
  - > Add other training plans and groups
  - > Auto Enrollment



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# Implementing an LMS



- Test if possible
  - > Consider starting with a small group, one training
  - > Add other training plans and groups
  - > Auto Enrollment

Training Plan List

Search Training Plans

Filter by: [+ Filter](#) [Clear](#)

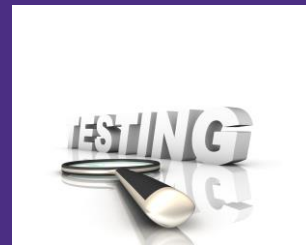
Type: [All Types](#) Owners: [UW School of Dentistry](#) Approved: [Approved](#)

[New Training Plan](#) [Export Training Plans](#) 1 - 43 of 43

Title #	Type #	Approved	Owner #	Assign #
Asbestos UWSD	One-Time Only	✓	✓	214
Administration of USHA Workforce Requirements	Recurring every 365 days	✓	✓	74
Blood Borne Pathogens - Updated Feb 2018	Recurring every 364 days	✓	✓	890

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# Implementing an LMS



- Test if possible
  - > Consider starting with a small group, one training
  - > Add other training plans and groups
  - > Auto Enrollment

Back to Training Plan List

Training Plan Enrollment: Asbestos UWSD

TRAINING PLAN PROPERTIES

One-Time Only | [Cancel](#) | [Delete](#)

CURRENTLY ENROLLED: 0 ENROLLMENT

AUTO ENROLLMENTS

Assign system to automatically find and enroll students using a set of attributes or profiles.

Creating profiles

[+ New Profile](#) [Asbestos Auto-Enroll](#)

☒ Automatically enroll students who do not match automated enrollment profiles.

MANUAL ENROLLMENT

These optional settings will override the Training Plan properties of the rules assignment to the learner you find and enroll below.

Initial Start Date:  Enrollment Strategy: ☒ Available to students immediately.

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## Implementing an LMS

- Train your Help Desk
  - > SOP
  - > Training documents
  - > Online resources



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## Using an LMS to Improve Compliance

- Create Regular reports for each department
  - > Completions, incompletes, in-progress, not started, overdue, etc
    - My managers just want the overdue stuff, monthly
- Work with Leadership to establish expectations and reports
  - > Which reports to send them
  - > Who will be responsible for each department
  - > Consequences for not completing training on time



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## Using an LMS to Improve Compliance

Create Report <a href="#">Saved Reports</a>			
<input type="text"/> Search			
Title ^	Report #	Last Modified #	Options
Completed Basic Life Support (SWANK)	Course Completion History <small>link</small>	10/23/2018	<small>link</small> <small>edit</small> <small>delete</small>
Dean's Office Completions	Course Completion History <small>link</small>	11/02/2018	<small>link</small> <small>edit</small> <small>delete</small>
Incompletions: Endo	Course Completion History <small>link</small>	08/27/2019	<small>link</small> <small>edit</small> <small>delete</small>
Incompletions: OCS	Course Completion History <small>link</small>	08/07/2019	<small>link</small> <small>edit</small> <small>delete</small>
Incompletions: OMFS, Oral Path and AGD	Course Completion History <small>link</small>	08/07/2019	<small>link</small> <small>edit</small> <small>delete</small>
Incompletions: Oral Health Sciences	Course Completion History <small>link</small>	08/07/2019	<small>link</small> <small>edit</small> <small>delete</small>
Incompletions: Pediatric Dentistry	Course Completion History <small>link</small>	08/07/2019	<small>link</small> <small>edit</small> <small>delete</small>
Incompletions: Perio	Course Completion History <small>link</small>	08/27/2019	<small>link</small> <small>edit</small> <small>delete</small>

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## Using an LMS to Improve Compliance

[Back to Reports Page](#)

Select another report ...

### Course Completion History (i)

Saved Report: Incompletions: OCS

1 FILTER BY HIERARCHY (Optional - All selected by default)

Hierarchy

-- Office of Clinical Services (OCS) x

2 FILTER BY MODULES OR TRAINING PLANS (Optional - All selected by default)

☒ Module
 ☐ Training Plan

☐ Remove

No data found

☐ Remove From My Saved Report

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## Using an LMS to Improve Compliance

3 FILTER BY USER ATTRIBUTES (Optional - All selected by default)

Departments:

User Locations:

Job Titles:

Employment Types:

User Categories:

Custom Field 1:

Custom Field 2:

Custom Field 3:

Learner Status \*:

Hire Date Between:  -  -

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## Using an LMS to Improve Compliance

4 REPORT OUTPUT

Course Status \*:

Individual/Multiple \*:

☐ Show each user on a separate page

☒ Show External Training

☒ Include Trainings Manually Added by Learner

☐ Include Credit Hours in the Report Output

Date Type: ☐ Completed ☒ Due Date Range

☒ Show modules with no due date, e.g., External and Elective modules

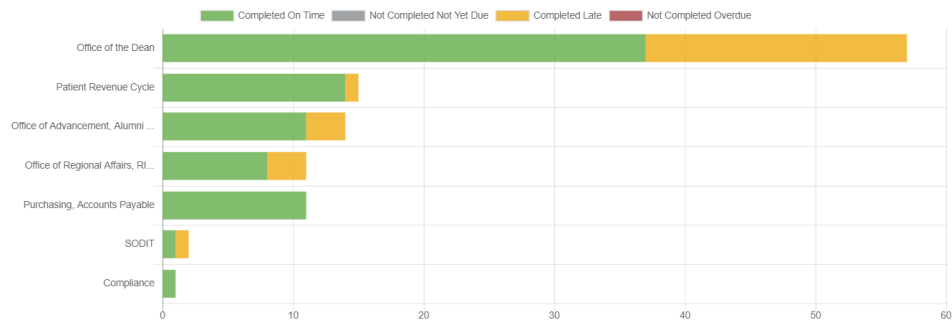
Date Range:  -  -

Optional Columns:

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# Using an LMS to Improve Compliance

Course Completion History



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# Using an LMS to Improve Compliance

ID	E	H	I	J	K	L	M	N	O	P	Q	R	S
1	Course Completion History												
2	9/13/2019												
19													
21	User ID	Learner	Department	User Location	Job Title	Course	Status	Completed	Due Date	Final Exam Score	Completion Type		
22	12345678	Smith, Suzee	RIDE			Asbestos General Awareness UWSD	Completed	7/1/2019	7/24/2019	100	Online completion		
23	12345679	Smith, Suzee	RIDE			Code of Conduct Non-Faculty UWSD	Completed	6/25/2019	7/24/2019	100	Online completion		
24	12345680	Smith, Suzee	RIDE			Compliance Concepts UWSD	Completed	7/27/2019	7/31/2019	90	Online completion		
25	12345681	Smith, Suzee	RIDE			FESRA Training For UWSD Staff	Completed	7/1/2019	7/24/2019	100	Online completion		
26	12345682	Smith, Suzee	RIDE			HIPAA UWSD	Completed	7/1/2019	7/24/2019	100	Online completion		
27	12345683	Smith, Suzee	RIDE			Integrity at Work UWSD	Completed	7/25/2019	7/24/2019	100	Online completion		
28	12345684	Smith, Suzee	RIDE			Patient Rights & Responsibilities UWSD	Completed	7/27/2019	7/31/2019	100	Online completion		
29	12345685	Smith, Suzee	RIDE			Privacy, Confidentiality, and Information Security Agreement UWSD	Completed	7/27/2019	7/31/2019	100	Online completion		
30	12345686	Smith, Suzee	RIDE			Sexual Harassment Prevention Training for Non-Faculty UWSD	Completed	7/1/2019	7/24/2019	100	Online completion		
31	12345687	Smith, Suzee	RIDE			Workplace Violence Prevention UWSD	Completed	7/25/2019	7/24/2019	100	Online completion		
32	12345688	Jones, John	Office of the Dean			Bloodborne Pathogen Education UWSD	Completed	8/7/2019	7/26/2019	100	Online completion		
	12345689	Learner, Engaged	Office of Clinical			Asbestos General	Completed	8/20/2019	9/19/2019	100	Online completion		

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## Using an LMS to Improve Compliance

Back to Reports Page  
Dean's Office Completions

1 SCHEDULE

Frequency  
☒ Monthly ☐ Weekly

Day of Month \*

File Format \*

Subject

Message

2 RECIPIENTS

☐ Remove

No data found

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## Using an LMS to Improve Compliance

- Determine your most deficient departments and start working with their leadership to improve their completion percentages
- The Miracle of electronic signatures
  - > Privacy Agreements
  - > MOUs
  - > Procedures/Policies
  - > Code of Conduct



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## Poll #3

What priority do you personally give to training in your organization?

- > **A. Top priority**
- > **B. Close to the top, but other things edge it out**
- > **C. Middling priority**
- > **D. Low priority**
- > **E. Not a priority whatsoever**

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## In Conclusion...

- **Do your homework**
- **Choose a stable, reliable LMS that has the key features your organization wants/needs**
- **Assign a competent project manager to implement**
- **Create recurring reports for monitoring**

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## Contact Information



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**May also be found performing at bar & bat mitzvahs and kids'**  
**birthday parties**

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