Completing Group Purchases

In order to complete group purchases on behalf of your organization, you will first need to setup your own user account. If you have already created an account, please skip to the *"Setting Up Your Organization and Completing a Purchase"* section below.

Creating Your User Account:

From the InnovaLife Home Screen

- Click the "Register Now" link in the top right corner of the screen.
- You will be taken to the registration screen and required to complete the necessary user fields.
- Upon completion, click "Sign Up"
- Login using the box on the right side of the screen.

Setting Up Your Organization (Institution) and Completing a Purchase

The following steps should only be completed by user(s) authorized to make purchases, and responsible for managing training on behalf of your organization. Once a user has setup a group, they assume the role of "Institute Admin" and will be able to manage training and view user records for your organization.

To complete a Group Purchase, you must first select or set-up your group, which is referred to as an "Institution" in the system. Upon initial set-up, you will only need to select your organization from a search field, found on the check-out screen.

Accessing Courses

- Login with the username for the individual authorized to purchase training/resources on behalf of your organization (Institute Admin Account).
- Click "Course Catalog" from the navigation bar.
- Click the training item(s) you would like to purchase and click "checkout" or "continue shopping".
  - Clicking "checkout" will take you directly to your cart.
  - If you click "continue shopping" but decide to not including additional items, click the "View Cart" link in the right corner of the catalog. You may also click "Group Purchase" at this time or later from your cart.

Cart Summary View

- If you haven't already, click the "Group Purchase" box.
- Check to see if your Group is already in the system by clicking "Merge with an Existing Group."
- In the "Group Name" field, search for your hospice. It is recommended you search/verify by CMS Provider ID to ensure you select the correct hospice from the list.
  - Format in system is Hospice Name – CMS Provider ID
    - Ex: Hope Hospice - 302918

*Note: If you cannot find your hospice via the search, you need to add it to the system. To do this, uncheck the "Merge with an Existing Group" box and enter the name of your hospice, including CMS Provider ID, into the "Group Name" field. Once you've entered the necessary information, complete the steps below.

- Once you've selected your hospice or entered the name (in the event it is not already in the system), click "Save."
- A "Group information captured successfully" message should appear.
- Review the items in your cart. If you plan on purchasing access to a course for multiple users, specify the number of users under the "Quantity" box to the right.
- Click "Checkout"
- Enter required payment information and click "Continue"
- Review your order and ensure the "Group Name" field, found in the "Group Purchase" section at the bottom of the screen is correct and contains the correct CMS Provider ID for your group.
- Click "Place Order" to complete your purchase for your group.
- Please review the following pages for steps on enabling Institute Admin Access and managing your institution/group.

Enabling Institute Admin Access

Once you have completed your purchase and established your user account as an "Institute Admin" you will need setup/enable your Institute. To complete this setup, follow the quick steps below.

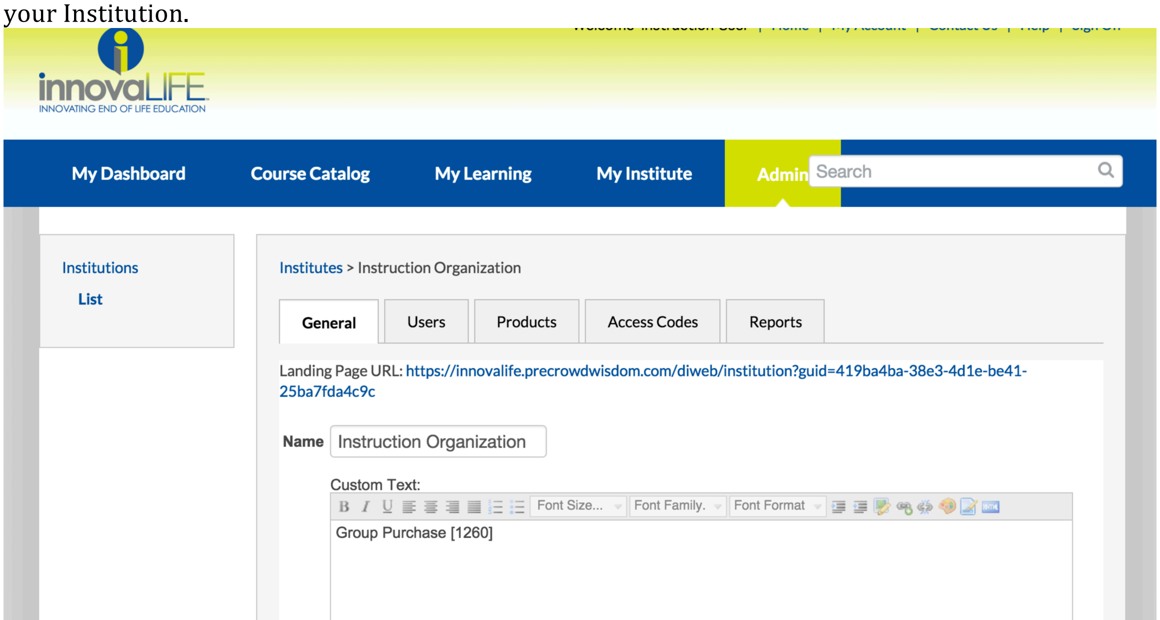
- Click "Sign Off" in the upper right corner to be taken back to the login page.
- Sign back into the system using the account information used to setup your Institution in the steps above.
- You will now see "My Institution" and an "Admin" tab in the navigation bar. You have now enabled your group's Institution.
- For more information on managing your Institution, please view the Institute Admin Guide below.

Institute Admin Guide

Adding Users to Your Institution

To add users, the following steps must be completed:

- Click the "Admin" link in the navigation bar.
- Click "Edit" next to the Institution you would like to provide the user access.
- You will see a "Landing Page URL". This link should only be shared with users you would like to enroll into your Institution.



- The user(s) should click the "Landing Page URL" provided, and either register or login (if they have previously created an account).
- Upon successful login, the user will be automatically enrolled.
- Going forward, the user will need to simply login to the InnovaLIFE Portal to access their Institution.

Admin Tools

To view the Institute Admin tabs, select "Admin" from the navigation bar and click "Edit" next to the name of the Institute you would like to manage.

General Tab

Name Field: Allows you to update the name for your Group/Institution

Custom Text Field: Allows the Admin to write notes about the Group/Institution. This text is not displayed to the user.

Logo: Add your Group/Institution Logo.

Users Tab

User List Search: Allows you to search for a specific user within your Group/Institution. Allows you to also remove a user from your Group/Institution.

Products Tab
The Products Tab displays all courses your Group/Institution has purchased. From the Products Tab, you can control who has access to the course and the Instructor(s) for each course.

Enrolling User: To manually enroll a user into a specific course, click the blue # link under the "Enrollment" column, to be taken to the attendees list for the course. From the attendees screen, enter the users name into the "Learner" field, under the "Enroll New Learner" section. Once a user has been added to the course, the Institute Admin can manually update their status, if necessary, for the course by clicking "Edit" next to the user's name in the attendees list.

Note: Only users already enrolled in your Group/Institution can be added to the course. If you are unable to add/locate a user, ensure they have first enrolled into your Institution.

Access Codes
Access codes are a great way of giving users free access to a product within your Group/Institution.

To create an access code, click "Add New Access Code" this will open a new tab allowing you to create an institution specific access code.

The fields in the access code section are:

Product (Item) – Specify the product(s) you would like to apply to the access code.
Start/End Date - The validity length of this access code, separate from product validity length.
Owner – If granting access code to specific user(s), enter the user(s) name. Leave blank if anyone can use the access code.
Quantity - The number of access codes created/the number of times an access code can be used depending on your business rules.
Prefix/Postfix - Any custom text you would like to add to make this access code memorable can be attached here.
Generate One Access Code - This will keep the access code from being used repeatedly across different courses and will restrict its usage to one course.
Free Access - This will give the user free access to the course and should generally be checked. For more advanced use cases please contact ymLearning Support.

Reports
This tab allows you to run any enabled reports in your system and see the results of surveys within your system. As a default, the reports are only available to the Institute Admin. If you do not see any reports and would like to add, please contact ymLearning Support.