



WELCOME!

This guide is designed to help you get started with the basic functionality of the [LearningVet.com](https://learningvet.com) system. We'll be making regular updates to this document as the system rolls out and evolves over time. If you need any additional assistance, please reach out to hello@learningvet.com.

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ADDING USERS MANUALLY

- Click the hamburger symbol
- Click admin, then click Users
- Under search fields, click Add User

The information you will need to add:

- First name
- Last name
- User Name and User ID (these should be the user's email address)

You can also opt to enter hire dates for your team as well as the user's address and phone number.

Enter the user's email address, which **should be the same as the User Name and User ID.**

Select your time zone. *This isn't required, but may come in useful for future live trainings.*

Enter the user's manager by clicking the box next to the manager field. Type some or all of the manager's name and press enter. Select the person you wish to assign as the new user's manager.

Enter the user's position. Here are the options:

- **Associate Veterinarian** (for any non-owner DVM)
- **Client Care** (for anyone who works at the front desk)
- **Credentialed Patient Care** (for any technician who is board certified (RVT/ CVT/ LVT, etc..))
- **Groomer** (for any groomer)
- **Patient Care** (for any person who participates in patient care who is NOT credentialed: kennel assistants, doctor assistants, veterinary assistants, etc..)
- **Practice Manager** (for any person in a manager role that is ABOVE supervisors)
- **Practice Owner** (for any owner in the hospital)
- **Supervisor** (for any departmental supervisor: tech supervisor, reception supervisor, kennel supervisor, etc..)

Once you have completed the user record, click **SAVE** at the very bottom of the page.

After saving, you will need to define a password for the new user. **We recommend having a standard new user password that all users start with.** The user will be asked to create a new password when they log on for the first time.



ADDING USERS USING THE UPLOAD TEMPLATE

Step 1: The Spreadsheet Template

- All fields that have a red heading are required. You may fill in as many additional fields as you wish.
- In the Hospital Role column, you will need enter the Position ID to assign the role that BEST MATCHES the new user's role. Here are the options:
 - o **Associate Veterinarian** (for any non-owner DVM)
 - o **Client Care** (for anyone who works at the front desk)
 - o **Credentialed Patient Care** (for any technician who is board certified (RVT/ CVT/ LVT, etc.)
 - o **Groomer** (for any groomer, obviously!)
 - o **Patient Care** (for any person who participates in patient care who is NOT credentialed: kennel assistants, doctor assistants, veterinary assistants, etc.)
 - o **Practice Manager** (for any person in a manager role that is ABOVE supervisors
 - o **Practice Owner** (for any owner in the hospital
 - o **Supervisor** (for any departmental supervisor: tech supervisor, reception supervisor, kennel supervisor, etc.)
- Save the spreadsheet in an easy to locate place.

Step 2: Upload

- Click the hamburger icon
- Click Integration Suite
- Click on Data Import Wizard
- Click Users
- Click Choose file and select the filled-in spreadsheet, then click Upload
- Click Next
- A popup window will appear with options. Since you are uploading an Excel spreadsheet saved as an .xls or .xlsx document, you will select:
 - o Worksheet 1
 - o Standard/ Default Template
- Click the "My file has titles/ headers" box
- Click Continue.
- Click Next



ADDING USERS USING THE UPLOAD TEMPLATE CONT.

Step 3: Review

- Review the headers that have been matched to the system's headers. This ensures that the data being uploaded will go to the right fields in the system.
- Unmatched fields are listed on the right in the Unmatched Fields column.
 - o Click and drag unmatched fields to the appropriate row in the Matched Fields column.
- All red fields must be matched with one of the file headers to proceed. We recommend matching as many fields as possible for the most accurate data upload.
- Click Preview to verify that the data is properly matched.
 - o System data fields are displayed in green
 - o Uploaded spreadsheet headers are displayed in blue
 - o If some data is not properly matched, you can go back and reorganize the fields.
- This spreadsheet can be saved as a template for future use.
 - o Click Save Template
 - o Enter a name for the template.
- Click Next

Step 4: Processing options

- There are only two boxes on this page that you need to check:
 - o Do not allow relationships with inactive users or OUs
 - o Assign default passwords for all new users.
 - Click the radio button next to the empty field and type in a default password that you will remember. It should be something hospital specific, such as MainStreetAH123!
 - Click Continue
 - (separate line)**All other boxes on this page should be left blank.



ADDING USERS USING THE UPLOAD TEMPLATE CONT.

Step 5: Validate

- *If there are any errors, click the View Errors button on the right of the progress bar. You will need to go back to your template and make any corrections or the data will not load properly.*
 - o You can see how to fix errors by clicking the How to Fix Errors link.*
 - o You may also click the Helpful Hints link at the bottom left corner of the page for additional information*
- *After resolving issues on the spreadsheet, click the Load Same File Type Again. You can also click the Restart link to begin the process over.*
- *Click Continue Validation.*
- *A summary of the results is displayed that shows:*
 - o Number of records that will be updated*
 - o Number of records that will be added*
 - o Number of records that have errors and cannot be updated*





ASSIGNING GOALS TO YOUR TEAM

Click the hamburger icon and then click Performance.

Click Goals

Click Create

You can create a new, custom goal, or you can use one of the many goals in the library. To access these, click the Library button at the top right side of the screen.

- *Choose a goal template by clicking the radio button next to it.*
- *Click Import*
- *If you want to add additional information, feel free to add text to the Description box.*
- *Choose a Start Date and Due Date for the goal.*
- *Goal Categories are already created for templated goals, but you can change them by clicking the dropdown menu under Categories.*
- *If you want to attach any files (checklists, etc.), click Choose File and select the file from your computer to upload.*
- *Decide who to assign the goal to*
 - o *Choose Yourself if this is a goal that is meant for you.*
 - o *To assign the goal to others, choose, Your Team.*
 - *Click the radio button next to the name(s) of the individual(s) you want to assign the goal to.*
 - *Click the radio button at the top of the list to assign to everyone.*
 - o *To assign the goal to a group (for example, technicians), click Custom Assignment*
 - *From the dropdown menu, select Group*
 - *Click the box next to the data field and choose the group you want to assign the goal to.*
- *Under options, you can click Dynamic Assignment. This will automatically assign the goal to any team member who is added to the team or group during the goal period.*

You may choose to make a goal a "shared" goal. This means that all team members work to achieve the goal. Shared goals are usually hospital goals, such as completing a specific number of dental cleanings.

- *To make a goal a Shared goal, at the bottom of the goal click the radio button "All users will share this goal and its progress."*
- *Choose who will manage the goal. This should be someone in a leadership position. This will default to you. If you want to change this:*
 - o *Click the Managed By box.*
 - o *Click the X on the right side of the box.*
 - o *Click the little box emblem, and enter the name of the person you want to manage the goal.*
 - o *Press Enter*
 - o *Click the name of the person you want to manage the goal.*
- *To save the goal, click Submit.*



CREATING DEVELOPMENT PLANS

Click Development Plans

To create a plan based on a template:

- *Click the button with 3 dots at the top right side of the page*
- *Click Create Plan From Template*
 - o *From the list, you can preview the plan by clicking preview.*
 - o *Click Apply Template to choose a template*
- *You can make changes to the fields of the plan to customize it for your team member*
- *To add objectives:*
 - o *Click Add Objective*
 - o *Type the skill that you want to include in this development plan*
 - o *Select the category for that skill*
 - o *Under Learning and Development, you can choose to search for online learning in the LearningVet.com database, browse recommended training, or add your own development action.*
 - *Adding your own development action allows you to add tasks, benchmarks, and other requirements for completion of the plan.*
 - o *You can Save and Add Another Development Objective, or you can Save and return to Plan.*
- *Assign the plan*
 - o *Self only: This is a development plan that you are creating for your own development.*
 - o *My Team: Clicking this allows you to assign the plan to one or more team member.*
 - o *Custom Assignment: Clicking this allows you to search for a group of people to assign the plan to, such as technicians.*
- *You can choose to make this plan the priority plan for the assignee by clicking the radio button at the bottom of the page.*
- *Click Submit Plan.*

You may also choose to create an untemplated plan.

- *Click Create new Plan*
- *Instead of the fields being filled in, you will need to enter the information for*
 - o *Title*
 - o *Description*
- *Untemplated plans mean there are no objectives. To add objectives, click Add Objective, then follow the Objectives instructions above.*
- *Follow the above instructions to assign the plan and choose whether to make it a priority plan.*
- *Click Submit Plan.*

CREATING AND COMPLETING PERFORMANCE REVIEWS

There are many performance review templates in the system. You will want to choose the one that best or most closely correlates to the role of the person you are reviewing.

Click the hamburger icon and click Performance

Click Performance reviews

At the top right of the page, click Launch Review

- *Click Someone Else (unless you want to perform the review for yourself) and click the box to the right of the text box.*
- *Type a few letters of the employee's name in the appropriate box and choose the employee.*
- *Click the box next to the text box after "Which form would you like to use?"*
- *Choose the review form that best or most closely matches the team member you are reviewing.*
- *Click Launch.*

The team member will receive notification that they need to complete a self-review. This self-review must be completed within 5 days. After they complete their evaluation, you will receive notification to complete your review of the employee. This review must be completed within 7 days. Once you receive the completed self-review from the employee, you will have 10 days to schedule a time to sit down and review it with them. There is a section of the review for this conversation that includes a discussion of the person's strengths, weaknesses, and goal setting.

To complete the review form, click Launch in your To-Do, or from the Reviews portal (*hamburger icon > Performance > Performance Reviews*). Once in the form, click Select Competencies you want to rate the person on. You can choose to rate the person on as many or as few of these as you wish.

For each competency, click Select and rate the individual on the scale. You may click the Options button at the top of the screen to view prior check-ins (for context), or to complete the review offline.

When you have finished the review, click Submit.

Once you and the team member have rated their performance, schedule the sit down and go back into their review by choosing their review in the summary page (*hamburger icon > Performance > Performance Reviews*).

Click Get Started. This will bring you to the review form that has the rating for each item, as well as the comments from both you and the team member. You'll then arrive at the strengths and weaknesses page, where you can identify the person's four strengths as well as two areas or opportunity for improvement.

The next page will show you the goals that the employee is currently working on. You may add goals by clicking Add Goals at the right side of the page. If the current goals don't align with the needs of the practice, you may cancel any goal directly on this page.

The next page is a summary page. It gives the employee an average score based on their assessment and yours. You may print this page for your or the team member's file (this evaluation will be available in the system as long as you are a subscriber).

The final page is the manager sign off. This is done by simply typing your name in the text box and clicking Sign. Click Submit to complete the review.

The team member's average score will now appear on their Snapshot page.

Check-ins allow you and your team to have ongoing conversations about their performance, their job satisfaction, and their ideas about the practice. iVET360 recommends holding these meetings with each team member monthly.

If you have a larger team (more than 15 members), your supervisors can perform these with their teams, with you participating in one per quarter or every six months.

Click the hamburger icon, then click Performance.

Click Check-Ins

- *Click Create New Check-In.*
- *You can choose an employee from the list, or you can search for one in the search box.*
- *Click Continue*
- *Choose the template you want to utilize. You can preview each template by clicking Details. For a completely custom template, use the Blank Template.*
- *Click Continue*
- *On the next page, you can change the name of the check-in, create a description, and choose the frequency with which you want to meet.*
- *Click Confirm*
- *Next, choose the date you want these meetings to start. They can start that day, or a day in the future.*

You are then taken directly to the form. You can also access this form from the Check-Ins menu (*hamburger icon > Performance > Check-Ins*).

During the meeting you can enter notes into each topic. At the bottom of the page, you can click Manage Topics if you want to change, delete, or add any topics to the meeting.

At the top right side of the screen, you can click the Goals icon to see the person's current goals, or Dev Plan to see their current development plan. At the bottom of that pane, you can click Manage to assign a new goal or development plan.

When you are finished with your one on one meeting, click Save to save your comments in the one-on-one. These comments will be available to you in future one on ones and performance reviews.



QUICK REFERENCE GUIDE - PROVIDING FEEDBACK

LearningVet offers you the ability to provide feedback to your team. While we at iVET360 never recommend providing critical or constructive feedback via electronic means, this can create a great opportunity for you to share positive feedback with your team when you have a moment to do so.

- *Click the hamburger icon, then click Home.*
- *Click Universal Profile.*
- *Click on View Team at the top right side of the page.*
- *Click on the team member you want to provide feedback to, then click My Feedback.*

Click the “Share your Feedback” text box. Here, you can type your specific kudos (always be specific!). You can click the “Everyone” box to choose whether the employee sees the feedback, the employee’s manager sees the feedback, or if everyone can see the feedback.

You can also assign badges based on the feedback you are providing. Click the badge icon to choose one of the available badges to award to the team member.





CREATING COMPETENCY ASSESSMENT TASKS

Competency assessments are similar to performance reviews, but can be completed at any time to help a team member understand where they are currently, and what they need to work on. Competency assessments can also help you, as manager, understand where to direct training efforts. One of the best things about competency assessments is that the data from them creates a Competency Gap Analysis Report, which tells you where the gaps are in your team's skills. This helps you make better hiring and promotion decisions, as well as identify your poorest performers.

Click the hamburger, then Admin, then Performance

Click Competency Assessment Tasks

Click Add task

- *Name your task (person's name, name of type or assessment, etc.)*
- *Can add a description and instructions for the person filling it out, but not required*
- *Add a date range for the task period*
- *Choose competency assessment task*
- *Click Next*

Click the symbol next to "Add a Competency Model"

- *You can browse through the models available, or, if you know the name of the one you want, search for it at the top of the pop up window.*
- *Click the plus sign next to the model you want.*
- *Click Next*

Click Add Relationship.

- *Here you can choose who gets to assess this individual. You should always choose manager, but you are welcome to offer a self-evaluation, or someone else, such as a doctor, to assess the employee*
- *Under Weight, choose the percentage of importance you want that person's assessment to have. For instance, the manager can be 100% of the weight, or they can share the weight with other assessors.*
- *Decide if you want the results from the assessee or manager to be seen*
- *Decide whether you want assessors to offer comments by choosing the box*
- *Click Next, then click Next again*

Now you will choose who will be assessed.

- *If an entire department will be assessed, choose Position, then click the symbol next to the drop down, then choose the hospital position(s) that will be assessed.*
- *If a specific level of a department will be assessed (e.g. Receptionist Level/Phase 2), choose Level, then click the symbol next to the drop down, then choose the specific level(s)*
- *If you only want to assess one user, click User, then click the symbol next to the drop down, then choose the user(s)*
- *Click Next, then click Save*



PERFORMING COMPETENCY ASSESSMENTS

This will be the same instructions for any person who is to fill out a competency assessment for someone on the team.

On your Welcome page, under Action Items, you should see "Complete (competency assessment name)

Click the assessment link, then click Continue

Click Begin on the assessment that you want to complete.

Rate the individual on each competency. The scale is:

N/A N/A	<i>N/A, too new to rate, or does not apply</i>
- Needs Improvement	<i>This rating is applied when an employee needs improvement or when the employee does not perform this skill or behavior</i>
+/- Meets Expectations	<i>This rating is applied when an employee meets the expectations for the skill or behavior. There is usually room for improvement when this rating is applied.</i>
+ Exceeds Expectations	<i>This rating is applied when an employee exceeds expectations. This is usually applied when the employee is confident and capable in the skill, or routinely exhibits or models the behavior for others.</i>

If you added the option to make comments, click the  symbol on any line to comment on that competency.

Click Submit Assessment when you are finished.





LEARNER HOME

The Learner Home page (reached by clicking the hamburger icon, Learning, then Learner Home) is where learners can access their assigned training, suggested training, and the course library.

- *Any content the learner has begun is at the top of the page.*
- *If the learner has identified subjects they are interested in, the next section will show them content that is related to their preferred subjects.*
- *Featured content are courses that are currently featured or popular in the system.*
- *Courses that have been assigned to the team member are in the box on the left of the page.*
- *At the top left of the page, they can see how many courses they completed, how many hours they have completed, and how many badges they have been assigned.*





THE LONG VERSION

- *Click the hamburger icon, then Admin.*
- *Click Learning Assignment Tool*
- *Click Create Assignment*
- *Choose whether you want to assign this one time, or if you want it to process continuously or periodically by clicking Dynamic.*
- *Define an assignment title. It is often easiest to just name the course you will be assigning.*
- *You can also add an assignment description. This could include instructions for things they should be looking for in the training, or reminding them of the due date.*
- *Click Select Training, and search for the training you want to assign. If you would like a comment to appear in the learner's completed course list, you can click the radio button and enter it there.*
- *Click Next*
- *On the next page, click Assigned, Approved and Registered.*
- *Click Next.*
- *Here, you can choose whether you want the assignment to be assigned the day you are creating it, or if you want it assigned on a date in the future. At the bottom, you can enter a training due date, the day at which the training must be completed.*
- *Click Next.*
- *Select users. You can simply click Add Users, or Select users to choose a specific person or people to assign the course to.*
- *Click Next*
- *Review your selections, and then click Submit.*
- *Please note: It can take up to ten minutes for the training to appear in the user's Learning page.*



THE SHORT VERSION

- *Click the hamburger icon, then click Learner Home.*
- *Choose or search for the course you want to assign and click the title.*
- *On the right side of the page, click Assign.*
- *Choose a due date and enter a comment if you wish. Select the users you want to assign the course to, or click the radio button at the top of the list to select all users.*
- *Click Submit.*





QUICK REFERENCE GUIDE - PLAYLISTS

Playlists are a great way to increase collaborative learning and engagement in your practice. You can include any online content on your playlist that you wish.

- *Click the hamburger icon, then click Learning.*
- *Click Playlists.*
- *Click Create New and create a title for your playlist. Click Create.*
- *At the top of the page, you can click the slider to make the playlist public in your practice. Keeping the slider orange means that the playlist is private, and you are the only person who can access it.*
- *To add content, simply search for a LearningVet course in the search box under the Add From Catalog tab, or add a link in the Add a Link tab.*
- *To add a link, paste a link to your content in the text box and press Enter.*
- *You can add a title for the page or change the description. You can also add a comment about what you learned from the content, what you liked most about it, or why you find it relevant.*
- *Click Add to Playlist.*

