Organization Management
User Guide

medtrainer®

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How to create an account for an employee

Step 1: Log in at MedTrainer
Step 2: On the left hand column, select **Organization Management,** and select **employee center**
Step 3: Select **create account** (located at the left hand corner) and enter the employees' information manually or upload your CSV, where it will automatically populate after it has been uploaded
Step 4: After the information has been entered or CSV has been uploaded, select the **"create"** button

How does an Admin change the status of their employee

Step 1: Log in at MedTrainer
Step 2: On the left hand column, select **Organization Management,** and select **employee center**
Step 3: Click on the **employee** you wish to update their **"employee status"**
Step 4: Click on **"change status"** then select the new status by clicking the drop down menu with the correct status

How does an Admin delete an email address of a terminated employee?

You cannot delete the email but you can modify it. Once you modify the email that the other person had you will be able to use that email again to create a new user.
Please follow the steps below in order to change the email for an existing user:

Step 1: Log in at MedTrainer
Step 2: Go to Organization Management and click on **Employee Center**
Step 3: Search for the employee that you want to update
Step 4: If the employee is terminated click on the **"Terminated"** button
Step 5: Click on the employee's name
Step 6: Click on Full Profile
Step 7: Click on User And Password
Step 8: Edit the email
Step 9: Click **save**

How does one become a supervisor

Step 1: Log in at MedTrainer
Step 2: On the left hand column, select **Organization Management**, and select **supervisor**
Step 3: Enter the appropriate fields to make person a supervisor
Step 4: Once fields have been entered, select the **"add"** button
Step 5: If a supervisor needs to be removed, simply go inside the **"Supervisors in Company"** box located at the top, and click on the **trashcan icon** next to the name and it will remove the person as a supervisor

How to create a department

Step 1: Log in at MedTrainer
Step 2: On the left hand column, select **Organization Management,** and select **department**
Step 3: Select **create department** and enter the name of the department(s) your organization includes or upload your CSV, where it will automatically populate after it has been uploaded
Step 4: Once fields have been entered or CSV uploaded, select **"create"**

How can a department be modified or deleted

Step 1: Log in at MedTrainer

Step 2: On the left hand column, select **Organization Management,** and select **department**

Step 3: If you choose to modify a department, select the **paper/pencil icon** and update the department - once changes have been made, select the **save button**

Step 4: If you wish to delete a department, find the department you wish to delete and select the **trashcan icon** to delete the department

How to create a location

Step 1: Log in at MedTrainer

Step 2: On the left hand column, select **Organization Management,** and select **location**

Step 3: Create location and enter the necessary fields or upload your CSV, where it will automatically populate after it has been uploaded

Step 4: Once fields have been entered or CSV uploaded, select **"create"**

How can a location be modified or deleted

Step 1: Log in at MedTrainer

Step 2: On the left hand column, select **Organization Management,** and select **location**

Step 3: If you choose to modify a location, select the **paper/pencil icon** and update the location - select the **save** button once changes have been made

Step 4: If you choose to delete a location, find the location you wish to delete - select the **trashcan icon** to delete the location

What is a CSV?

A CSV is an excel document with your organization's information. This document is a shortcut when entering employee information, especially when you have a large number of staff in your organization.