

USER MANUAL – CERTIFICATE DASHBOARD

TARGET AUDIENCE: ADMINISTRATORS

Updated September 8, 2021

Program Administrators will be responsible for reviewing their learner’s certificate details to ensure the information is correct. Any learners within 3 months of their end date of training will need their certificate details reviewed by the program.

Step 1 – Selecting Certificates With ‘NEW’ Status

Go to the Trainee Registration module and choose the certificate status of “New”.

- The status of New means that the learner has not yet been reviewed in the dashboard by the program.

Home > Trainee Registration > Trainee Search

Student #: OPHRDC #:
 Last Name: Hospital Employee #:
 First Name:

Registration

Training Session: 2020 - 2021 Legal/Visa Status: --Select--

Trainee Status: Draft Historical New Returning
 Withdrawn N/A

Trainee Type: Trainee Elective N/A

Registration Status: Pre-Registered Registered Ready
 Not-Ready Withdrawn N/A
 Registered - Not in good standing

Training

Approval Status: Approved Training Completion Status: --Select--
 Training Status: --Select-- Training Status Detail: --Select--
 Department: --Select-- Certificate Status: New
 Program: --Select-- Base Program: Search
 Funding Type: --Select-- Funding Source: CLEAR SELECTION
 Training Level Type: --Select-- Training Level: Approved
 Type of Training: --Select-- Specialty: New
 Pending Approval

Select all learners in the search screen and choose the new button called “View Certificates” in the top right corner to enter the Certificate Dashboard:

Home > Trainee Registration > Trainee Search

Registration Info: Training Session: 2020 - 2021 Approval Status: Approved Certificate Status: New

Trainee Search Result Selected: 421 Total: 421

Search: [Print Documents](#) [Export](#) [View Certificates](#) [Send Email](#) [Run Task](#) [View Profile](#)

<input checked="" type="checkbox"/>	Name	Last Program	Last Training Start Date	Last Training End Date	Last Training Approval Status	Last Training Completion Status	Last Training Level
<input checked="" type="checkbox"/>	Abdin, Rawand	Internal Medicine	17-Dec-2020	30-Jan-2021	Approved	Completed Training	PGY4
<input checked="" type="checkbox"/>	Abo Zeed, Moaaz	Clinical Neonatology	01-Jul-2020	31-Dec-2020	Approved	Completed Training	Clinical Fellow
<input checked="" type="checkbox"/>	Agarwal, Minu	Breast & Cross-Sectional Imaging	01-Jul-2020	30-Jun-2021	Approved	Completed Training	Clinical Fellow

The Certificate Dashboard will display the certificate details for each learner:

Registration Info: Training Session: 2020 - 2021 Certificate Status: New

Certificates Search Result Selected: 120 Total: 120

Search: [Export](#) [Run Task](#) [View Profile](#)

Trainee Name	Training Program	Training Level Type	Training Start Date	Training End Date	Program Director	Certificate Status	Certificate Start Date	Certificate End Date
Jaffer, Iqbal Haider	Transcatheter Aortic Valve Fellowship	Fellow	01-Jul-2020	31-Dec-2020	Carroll, Robin	New	01-Jan-2020	31-Dec-2020
Fung, Filgen Yut-Tou	Emergency Medicine	Resident	01-Jul-2020	01-Nov-2020	Dyment, Rachelle	New	02-May-2017	01-Nov-2020
Marseu, Alexandra	Maternal Fetal Medicine	Resident	01-Jul-2020	15-Mar-2021	Montgomery, Amanda	New	01-Jul-2018	15-Mar-2021
Van Der Watt, Leon	Foot & Ankle Orthopedics	Fellow	01-Sep-2020	30-Nov-2020		New	01-Sep-2020	30-Nov-2020

Step 2 – Reviewing Certificate Details

Programs will have TWO options for reviewing and submitting their certificate information:

OPTION 1: Individual Learner Approval Through Training Line (BEST PRACTICE)

- Select all learners and choose “View Profile”:

Home > Trainee Registration > Trainee Certificates

Registration Info: Training Session: 2020 - 2021 Approval Status: Approved Certificate Status: New

Certificates Search Result Selected: 424 Total: 424

Search: [Export](#) [Run Task](#) [View Profile](#)

Trainee Name	Training Program	Training Level Type	Training Start Date	Training End Date	Program Director	Certificate Status	Certificate Start Date	Certificate End Date
Abdin, Rawand	Internal Medicine	Resident	17-Dec-2020	30-Jan-2021	Whitehead, Lori N	New	01-Jul-2015	30-Jan-2021
Abo Zeed, Moaz	Clinical Neonatology	Fellow	01-Jul-2020	31-Dec-2020		New	16-Dec-2016	31-Dec-2020

- Click on the status of “new” in their training line to view the details of the certificate:

Home > Trainee Registration > Trainee Profile > Initial View 1 out of 421

Abdin, Rawand

Training Lines

Session 2021 - 2022 [Add Training](#)

Session 2020 - 2021 - Current [Returning Trainee](#) [Registered](#) [View Registration Confirmation](#) [Edit Registration](#)

Program	Training Level	Funding Source	Funding Category	Training Status	Start Date	End Date	Type	Reg'n Status	Pool	FTE	Waiver	Completion Status	Approval Status	Certificate Status	Alerts
Internal Medicine	PGY4	Ont Min Hlth-CIMG	Regular MOH Funding/Clinical Education	Active	17-Dec-2020	30-Jan-2021	Trainee	Registered	B	0.12	N	Completed Training	Approved	New	●
Internal Medicine	PGY4	Ont Min Hlth-CIMG	Regular MOH Funding/Clinical Education	Personal Leave	16-Nov-2020	16-Dec-2020	Trainee	Registered	B	0	N	Continue Training	Approved		●

It will bring you to their details where you can make any modifications:

Certificate Details

First Name*:

Last Name*:

Training Record*:

Training Program*:

Program Director*:

Status*:

Start Date*:

End Date*:

Comments:

50 characters remaining

- If modifications are made, please write in the comments what was modified. Once you are happy with the details, click “submit”.
- If no updates are made, the status will become “Approved”.
- If modifications are made, the status of the certificate will become “Pending Approval” for the Postgrad Office to review and approve.
- Repeat this process for each learner until there are no longer any learners that appear with a status of “New”.

To move to the next learner to review, use the single arrow in the top right arrow:

Home > Trainee Registration > Trainee Profile > Certificates
1 out of 421 >> ⚙️ 🗨️

Certificates
+ Add New

Training Program	First Name	Last Name	Program Director	Start Date	End Date	Status
Internal Medicine	Abdin	Rawand	Whitehead, Lori N	01-Jul-2015	30-Jan-2021	New

OPTION 2: BULK APPROVAL

- From the search screen, review the details of each learner’s certificate.
- If all details are correct, click on “Run Task” and “Approve”:

The screenshot shows the MedSIS 3C interface. A 'Run Task' dialog box is open, with a dropdown menu set to 'Approved'. Below the dialog, a table of certificate search results is visible. The table has columns for Trainee Name, Training Program, Training Level Type, Training Start Date, Training End Date, Program Director, Certificate Status, Certificate Start Date, and Certificate End Date. Four entries are listed, all with a 'New' status. The 'Run Task' button in the top right of the table is highlighted with a red box and a red arrow.

Trainee Name	Training Program	Training Level Type	Training Start Date	Training End Date	Program Director	Certificate Status	Certificate Start Date	Certificate End Date
Zamiri, Nima	Cardiology	Resident	01-Jul-2020	27-Jul-2020	Mosher, Judy	New	01-Jul-2017	27-Jul-2020
Raco, Michael	Interventional Cardiology	Fellow	01-Jul-2020	05-Nov-2020	Carroll, Robin	New	01-Jul-2019	05-Nov-2020
Akbari, Vahid	Advanced Echocardiography	Fellow	01-Jul-2020	30-Sep-2020	Reeve, Doreen	New	01-Jul-2019	30-Sep-2020
Benz, Alexander Philipp	Cardiology	Fellow	01-Jul-2020	01-Jan-2021	Mosher, Judy	New	14-Jan-2019	01-Jan-2021

These learners will be automatically approved to be exported for printing by the Postgraduate Office.

QUESTIONS?

If you have any questions or difficulties with this process, please contact MedSIS at medsis@mcmaster.ca