USER MANUAL – CERTIFICATE DASHBOARD

TARGET AUDIENCE: ADMINISTRATORS
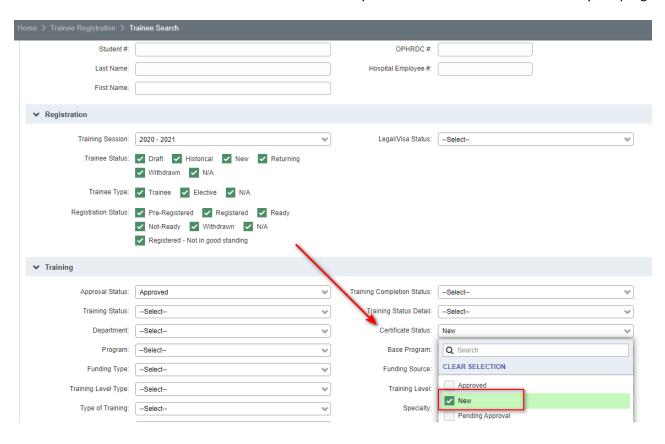
Updated September 8, 2021

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.
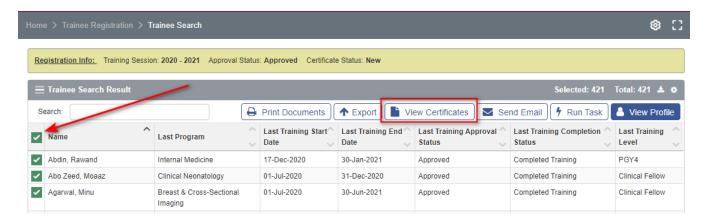
Step 1 – Selecting Certificates With 'NEW' Status

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.

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:

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

≡ 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

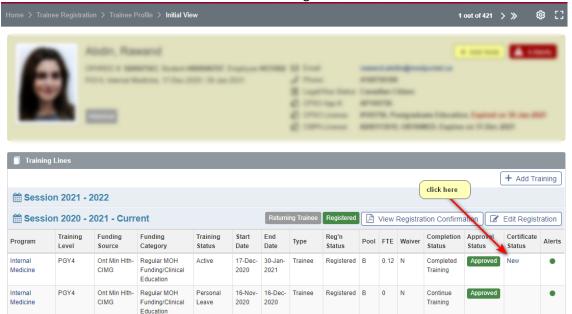# Step 2 – Reviewing Certificate Details

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

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

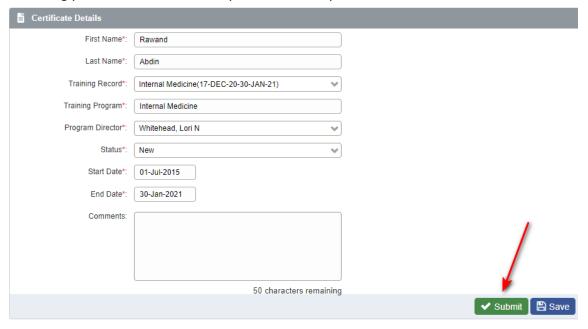- Select all learners and choose "View Profile":

Home > Trainee Registration > **Trainee Certificates**   ⚙ ⛶

≡ 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, Moaaz	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   + Add Training

click here

📅 **Session 2021 - 2022**

📅 **Session 2020 - 2021 - Current**   [Returning Trainee] [Registered]   📄 View Registration Confirmation   ✎ Edit Registration

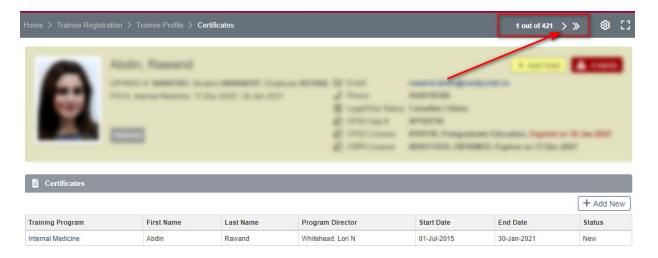| Program	Training Level	Funding Source	Funding Category	Training Status	Start Date	End Date	Type	Reg'n Status	Pool	FTE	Waiver	Completion Status	Approval Status	Certificate Status	Alerts
Internal Medicine	PGY4	Ont Min Hlth-CIMG	Regular MOH Funding/Clinical Education	Active	17-Dec-2020	30-Jan-2021	Trainee	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:

- 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:
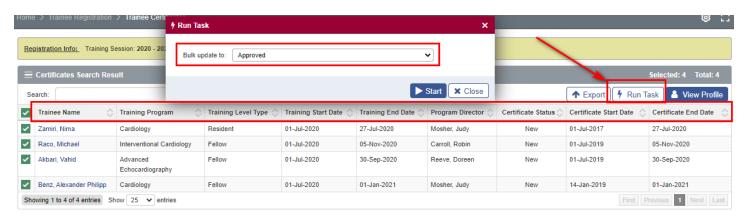
OPTION 2: BULK APPROVAL

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

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