

# USER MANUAL – MEDPORTAL EMAILS

**TARGET AUDIENCE: PGMEO OFFICE**

---

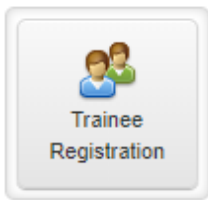
Updated April 12, 2019

## MEDPORTAL EMAILS

Medportal emails are created by Chris Sisson in the Medportal Office. Once a trainee is added into the system, their information will need to be sent to Chris to create the Medportal Email. At this point, Chris will also send a welcome email to the trainee letting them to log into MedSIS.

### How to Export Medportal Emails

1. Click on the Trainee Registration Module located on the home screen of MedSIS.



2. Filter on the following:

Registration

Training Session:

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 Withdrawn  N/A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 Not-Ready  Withdrawn  N/A

Under the alerts tab on the same screen, filter on the alert called “Medportal Email – Missing”

Alerts

CMPA:  CMPA expired - 1st Day of Training  CMPA expired - NOW  CMPA expired - During Training

CPSO:  CPSO - missing  CPSO Expired - 1st Day of Training  CPSO expired - NOW  CPSO Expired - During Training

e-Modules:  e-Modules - incomplete

HAL:  HAL - Not Available  HAL - Signature Required

Immunization Form:  Immunization Form - Not Cleared

LOA:  LOA - Not Available  LOA - Signature Required

Miscellaneous:  MINC Number - Missing  Trainee NOT in Good Standing  Barcode - Missing  DOB - Missing  Legal Status - Missing  
 LOGS  Medportal email address - Missing  Pool - Missing  Scrub Size - Missing  Trainee Picture - Missing  
 Invalid Student Number

Payment:  Payment Outstanding

Registration Form:  Elective Registration Form - Not Completed  Trainee Registration Form - Not Completed

Rotation Schedule:  Incomplete rotation - location  Incomplete rotation-service  Incomplete rotation-service format  Rotation start before Training Line

Training Promotion:  2018 - Not fully promoted  2019 - Not fully promoted

Work Permit:  Work Permit - During Training - IOP  Work Permit - IOP  Work Permit - NON IOP  Work Permit - During Training - NON IOP

Search Type:  All Alerts  Any Alert

3. Check off all names listed using the top checkbox beside the word "name" in the heading
4. Choose the export feature

Registration Info: Training Session : All Trainee Status : All Trainee Type : All Registration Status : All Approval Status : Approved  
 Alerts : Alerts Search Type : All Alerts Miscellaneous: Medportal email address - Missing

Trainees Search Result Selected: 1 Total: 1

Search:  Print Documents Export Send Email Run Task View Profile

<input checked="" type="checkbox"/>	Name	Student #	Last Program	Last Training Start Date	Last Training End Date	Trainee Status	Last Training Approval Status
<input checked="" type="checkbox"/>	Venegas Garrido, Carmen Paz					New Trainee	

Showing 1 to 1 of 1 entries Show 25 entries First Previous 1 Next Last

5. Within the export feature, choose the following:

**Trainees Export**

Please select the fields to be exported.

As of current date  Training Session All

Trainees Info

<input checked="" type="checkbox"/> Trainees Name	<input type="checkbox"/> Student #
<input type="checkbox"/> OPHRDC #	<input type="checkbox"/> Hospital Employee #
<input type="checkbox"/> MINC #	<input type="checkbox"/> Mac ID
<input type="checkbox"/> CPSO Number	<input type="checkbox"/> DOB
<input type="checkbox"/> CMPA #	<input type="checkbox"/> Gender
<input checked="" type="checkbox"/> Default Email	<input type="checkbox"/> Legal Status
<input type="checkbox"/> Current Living Residence	<input type="checkbox"/> Mailing Address
<input type="checkbox"/> Phone	<input type="checkbox"/> Emergency Contact
<input type="checkbox"/> Medical Degree	<input type="checkbox"/> Trainee Status
<input type="checkbox"/> SIN	

**Trainees Export**

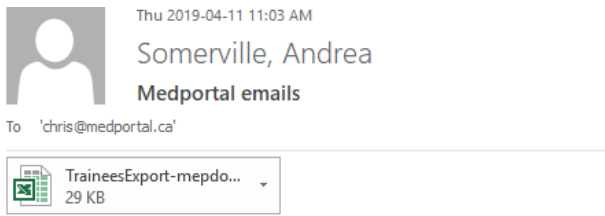
<input checked="" type="checkbox"/> Phone	<input checked="" type="checkbox"/> Emergency Contact
<input checked="" type="checkbox"/> Medical Degree	<input checked="" type="checkbox"/> Trainee Status
<input checked="" type="checkbox"/> SIN	
<input checked="" type="checkbox"/> Training Info	
<input type="checkbox"/> Program	<input checked="" type="checkbox"/> Base Program
<input type="checkbox"/> Training Level Type	<input checked="" type="checkbox"/> Training Level
<input type="checkbox"/> Specialty Type	<input type="checkbox"/> Specialty
<input type="checkbox"/> Funding Source	<input type="checkbox"/> Training Status
<input type="checkbox"/> Trainee Type	<input checked="" type="checkbox"/> Training Start Date
<input type="checkbox"/> Training End Date	<input type="checkbox"/> FTE
<input type="checkbox"/> Employment Type	<input type="checkbox"/> Waiver
<input type="checkbox"/> Registration Status	<input type="checkbox"/> Registration Source
<input type="checkbox"/> Training Location	<input type="checkbox"/> Base Location
<input type="checkbox"/> Payment Agent	<input type="checkbox"/> Home School

Export to file Close

- Open the excel file and clean up the data. If there is a column for PEAP and another for the Fellowship line, delete the fellow line as Chris only needs the start date. Add a column at the end called "medportal". This is where Chris will enter the new emails and send back to you.

	A	B	C	D	E	F	G	H
1	<b>Trainee Last Name</b>	<b>Trainee First Name</b>	<b>Email</b>	<b>Training Session</b>	<b>Base Program</b>	<b>Training Level</b>	<b>Start Date</b>	<b>Medportal</b>
2	Amarjit Singh	Jasminder Kaur	jasmine.k_rai@yahoo.com	2019 - 2020	Developmental Pediatrics	PEAP	01-Sep-2019	
3	Bayoumi	Ahmed B. A.	abayoumigcst@gmail.com	2019 - 2020	Neurosurgery	PEAP	01-Jul-2019	
4	Dholakia	Saumil Yogendra	saumil.dholakia@mail.utoronto.ca	2019 - 2020	Psychiatry	PEAP	01-Jul-2019	
5	Zhao	Nan	nan.zhao@mail.mcgill.ca	2018 - 2019	Respiratory Medicine	PGY5	11-Mar-2019	
6								

- Save the file and send to Chris Sisson at [chris@medportal.ca](mailto:chris@medportal.ca). Here is an example of the email I would send to Chris with the attached excel file.



Hi Chris,

Please see attached for new trainees that require medportal emails.

Thanks,  
Andrea

- Once Chris sends you the file back you can manually enter the medportal email under **Trainee Registration** → **Contact Info**. Please ensure to make the medportal email the "Primary Email".