

# USER MANUAL – ADDING A NEW LEARNER

TARGET AUDIENCE: ADMINISTRATORS

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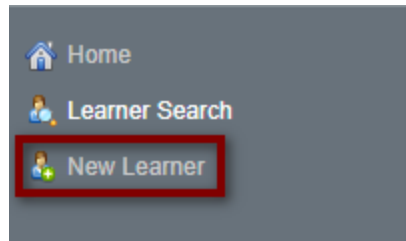
Updated June 16, 2023

## Adding a New Learner

**Step 1:** To add training lines, click on the menu item called “Learner Registration”.



**Step 2:** From the left-hand menu, select “New Learner”.



**Step 3:** In order to prevent creating duplicate learner accounts, use the search input to check if the learner already exists. Search by name, email, CPSO, etc.

*Tip: If the learner comes up, please do not add them! This means they have an existing profile and possibly training lines in MedSIS.*

**+ Add New Learner**

In order to prevent creating duplicate Trainee accounts please use the search input below to check if Trainee already exists.

Search:

*If the user DOES exist in matched users:*

The system allows you to:

1. **Add Trainee Role** – This will add a trainee (learner) role to the existing profile.
2. **View Trainee Profile** - clicking on this will open the learner’s profile in another tab.

Doe, Jane	jane.doe@k4y.com	Admissions Read Only - UGME Admissions Super User - UGME Program Manager		<a href="#">+ Add Trainee role</a>
Doe, John	mcmasterlearner31@mcmaster.ca	Trainee	MACID mcmasterlearner31	<a href="#">View Trainee Profile</a>

**Step 4:** If the user does not have any matches, click “Add New”.

**+ Add New Learner**

In order to prevent creating duplicate Trainee accounts please use the search input below to check if Trainee already exists.

Search:

**Matched Users** Trainee

Name	Emails	Roles	Details	Actions
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**Step 5:** Fill in the learner’s information and then “Add Learner”. Last name, first name and default email are required.

**+ Add New Learner**

In order to prevent creating duplicate Trainee accounts please use the search input below to check if Trainee already exists.

Search:

**+ New Learner**

Student #:

Last Name\*:  First Name\*:

Former Last Name:  Default Email\*:

**Step 6:** Select “Add Training”.

**Doe, John**  
 OPHRDC #: 920025133  
 Mac ID: mcmasterlearner31  
 Draft

Email: [mcmasterlearner31@mcmaster.ca](mailto:mcmasterlearner31@mcmaster.ca)

**Training Lines**

There are no training lines on the current or future training sessions

**Step 7:** Select Learner Type. Training lines will be different based on the learner type selected.

- Elective: A PGME Elective Learner
- Student: A Nursing, Graduate Studies, Midwifery or UGME Learner
- Trainee: A PGME Home Learner

**Add Training**

Learner Type\*:

**CLEAR**

- Elective
- Student
- Trainee

**Step 8:** Fill in Training Profile Information and save.

All Training Lines have:

- Training Session
- Training Program
- Training Level
- Start and End Date
  - For FHS Programs, the start date will always be “September 1” and the end date will be “August 31”.
- Training Status
- Employment Type
- Training Completion Status

**Training Profile**

**Add Training**

Learner Type\*: Student

Training Session\*: --Select--

Training Program\*: --Select--

Training Level\*: --Select--

Campus: --Select--

Start Date\*:

Training Status\*: --Select--

Employment Type\*: --Select--

End Date\*:

**Training Completion**

Training Completion Status\*: --Select--

Promotion Date: N/A

Comments:

4000 characters remaining

PGME Home Trainees only:

- Base Program
- Funding Source

**Training Profile**

**Add Training**

Learner Type*: Trainee	
Training Session*: --Select--	
Training Program*: --Select--	
Training Level*: --Select--	
Training Status*: --Select--	
Location: --Select--	
Base Location: --Select--	
Payment Agent: --Select--	
Waiver: <input checked="" type="radio"/> NO	
Base Program*: --Select--	
Funding Source*: --Select--	
Training Status Detail: --Select--	
Employment Type*: --Select--	
Start Date*: <input type="text"/>	
End Date*: <input type="text"/>	

**Training Completion**

Training Completion Status*: --Select--	Promotion Date: N/A
Comments: <input type="text"/>	

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PGME Elective Trainees only:

- Home School Training Information

Training Profile

Add Training

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Learner Type\*: Elective ▼

Training Session\*: --Select-- ▼

Training Program\*: --Select-- ▼

Training Level\*: --Select-- ▼

Training Status\*: --Select-- ▼

Location: --Select-- ▼

Base Location: --Select-- ▼

Payment Agent: --Select-- ▼

Waiver:  NO

Base Program\*: --Select-- ▼

Funding Source\*: --Select-- ▼

Training Status Detail: --Select-- ▼

Employment Type\*: --Select-- ▼

Start Date\*:

End Date\*:

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**Home School Training**  
\*not required, but only applicable to elective learners

Home School: --Select-- ▼

Home School Program: --Select-- ▼

Home School Start Date:  Home School End Date:

✖ Clear 🔍 Select Other

Home School Academy: --Select-- ▼

Home School Training Level: --Select-- ▼

Home School Student #:

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Training Completion Status\*: --Select-- ▼

Comments:

Promotion Date: N/A

4000 characters remaining

**QUESTIONS?**

If you have any questions or difficulties with this process, please submit them through our ticketing system.

To submit a ticket, please visit [medsishelp.mcmaster.ca](https://medsishelp.mcmaster.ca)

User Guide: [How to Submit a Ticket](#)