

USER MANUAL – PROMOTING LEARNERS INTO THE NEXT TRAINING LEVEL

TARGET AUDIENCE: ADMINISTRATORS

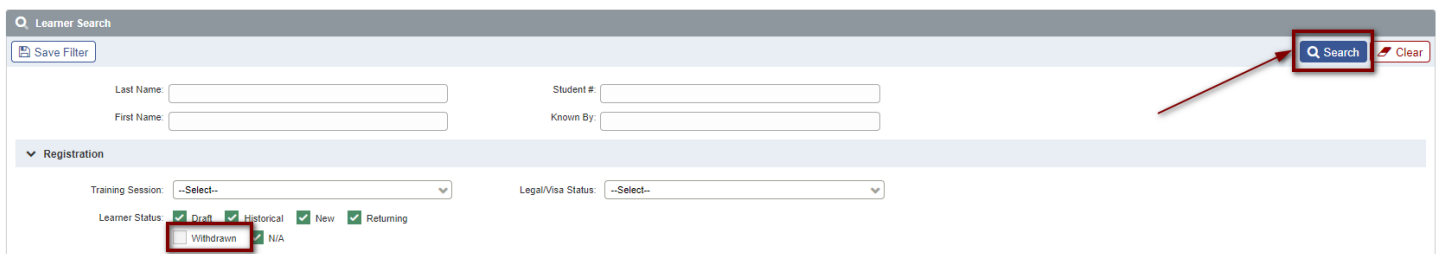
Updated June 16, 2023

Step 1: To promote learners, click on the menu item called “Learner Registration”.

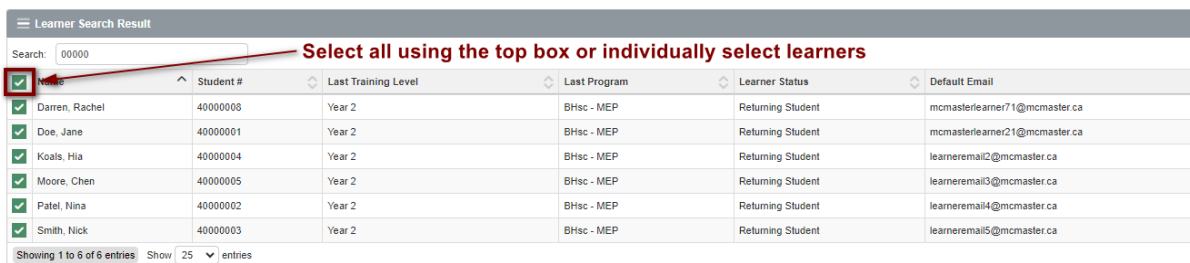


Step 2: Use the Learner Search to open learner profiles.

Tip: Ensure you are excluding withdrawal from the search or withdrawn students will be promoted! Please also ensure that you search by year level, as you do not want to promote learners who are in their final year of the program.



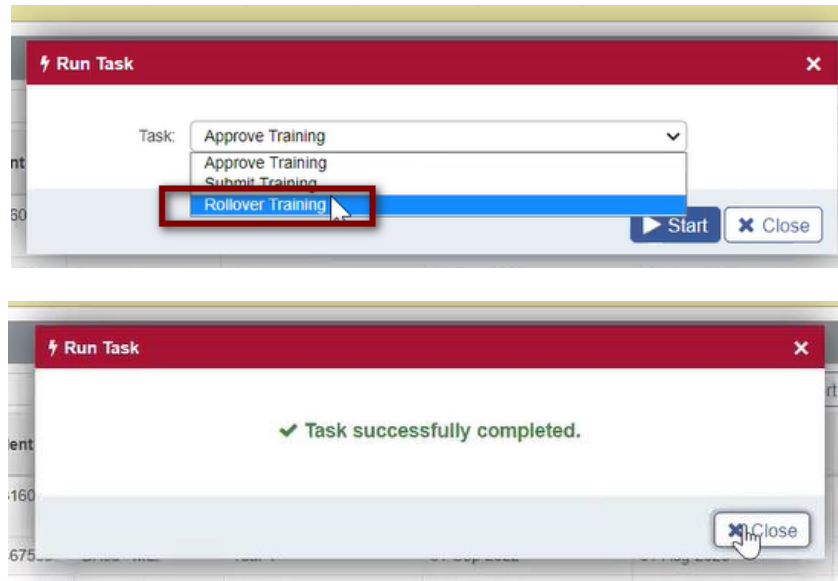
Step 3: Select the learner(s) you wish to promote.



Step 4: Click “Run Task” button.

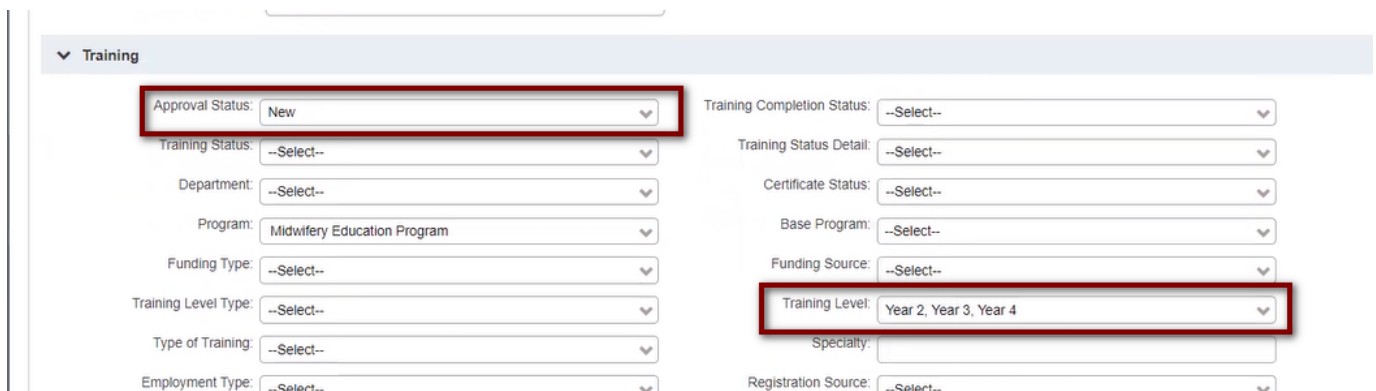


Step 5: Select “Rollover Training”. This will generate training lines and they will be the status “Pending Approval”. They will be highlighted yellow. Once done, a message will appear “Task Successfully Complete”. Close out of the window.



Step 6: Go back to the Learner Search tab and select approval status “new” from the dropdown (found under training). You will need to search for them in the next training session because now they have been promoted.

Tip: You may also need to select more training levels, as your Y3s are now Y4s.



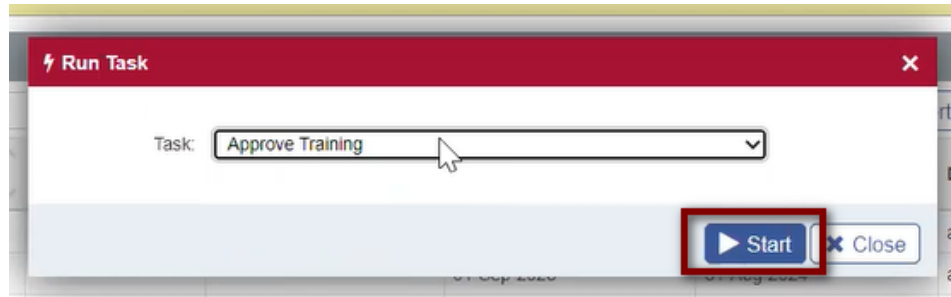
Step 7: Select the “Search” button at the top or bottom of the page.



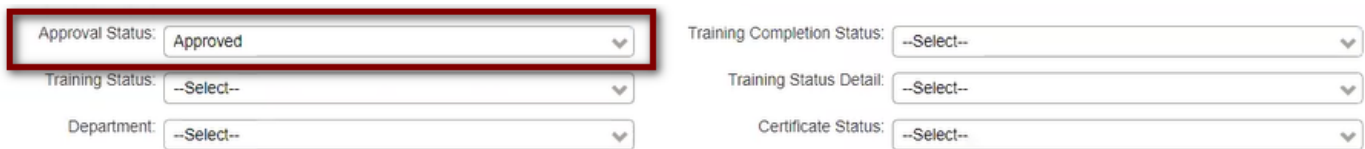
Step 8: Use the “Select All” and “Run Task”.



Step 9: Select “Approve Training” and “Start”.



Step 10: Review the promotion. Go back to the Learner Search tab and select approval status “approved” from the dropdown (found under training). *Tip: Removing the training levels will pull up all years. This is recommended when reviewing promotion. Another suggestion is filtering by each year level one at a time, to ensure the correct students were promoted.*



Step 11: Select the “Search” button at the top or bottom of the page.



Step 12: Review the training lines to ensure the information is correct.

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

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