

USER MANUAL – MONITORING/MANAGING LEARNER REQUIREMENTS

TARGET AUDIENCE: ADMINISTRATORS

Updated March 27, 2024

Contents

Brief explanation of Requirements	1
Common Learner Registration Requirements	1
Requirement Statuses.....	1
For Requirements with Uploaded Documents	1
For Requirements with E-Modules	2
Searching for Learner Registration Requirements.....	2
Understanding Search Type	2
How to Search	2
Through individual learner profiles.....	3
Using the Learner Search Requirement filters.....	4
How to upload Learner Registration Requirements	5
How to mark Learner Registration Requirements as “completed”	7

Brief explanation of Requirements

Learners have different requirements based on their program, year level, and training status. MedSIS works with the programs to set up the requirements.

Common Learner Registration Requirements

*Please note, this list of requirements will vary by program.

- Registration Forms
- Letters
- Health Screen Records
- CPSO License
- Work Permit
- Vaccination Forms
- E-Modules
- Scrub Sizes
- Mask Fits

Requirement Statuses

For Requirements with Uploaded Documents

Requirements with attachment files are uploaded by learners and need to be marked as completed by the program. This ensures the correct files are being uploaded by learners.

Requirement Status	Explanation
Expired	The uploaded document for the requirement has expired.
Missing	There is no uploaded document for this requirement.
Pending or Uploaded	The document has been uploaded for the requirement but not marked completed by the program. It is pending completion.
Completed	The document has been uploaded for the requirement and the program has marked it as completed.

For Requirements with E-Modules

Learners can go through requirements with e-modules on their own. Once the learner goes through the entire e-module and if applicable, completes a mandatory graded section, the system marks this requirement as completed.

Requirement Status	Explanation
Not Completed	The e-module has not been completed by the learner.
Completed	The e-module has been completed by the learner.

Searching for Learner Registration Requirements

Understanding Search Type

There is a field at the bottom of requirements that is for search type:

Outstanding
 Incomplete

Received Date: -

Search Type: All Documents Any Document

When the option 'All Documents' is selected, the system will verify if **all** documents/e-modules associated with the learner meet the specified criteria.

On the contrary, when the option 'Any Document' is chosen, the system will examine if **any** documents/e-modules completed by the learner satisfy the given criteria.

How to Search

You can search and view requirements for your learners two ways:

- 1) Opening individual learner profiles
- 2) Using the Learner Search Requirement filters

Through individual learner profiles

To access the learner requirements, click on the menu item called Learner Registration.

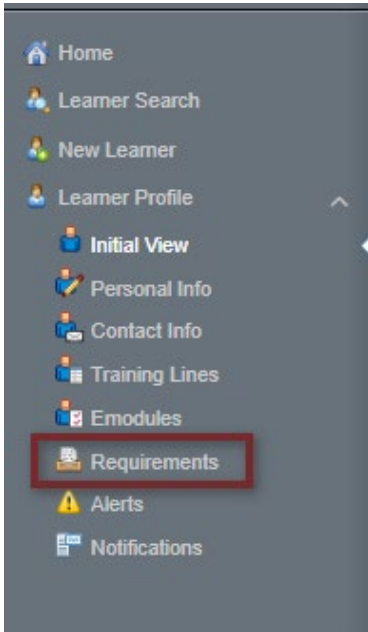


Use the Learner Search to open learner profiles.

Select the learner(s) you wish to view the requirements for and view profile.

Name	Student #	Last Training Level	Last Program	Learner Status	Default Email	Registration Status
Doe, Jane	40000001	Year 2	BHsc - MEP	Returning Student	learneremail1@mcmaster.ca	Not-Ready
Koala, Hia	40000004	Year 2	BHsc - MEP	Returning Student	learneremail2@mcmaster.ca	Not-Ready
Moore, Chen	40000005	Year 2	BHsc - MEP	Returning Student	learneremail3@mcmaster.ca	Not-Ready
Patel, Nina	40000002	Year 2	BHsc - MEP	Returning Student	learneremail4@mcmaster.ca	Not-Ready
Smith, Nick	40000003	Year 2	BHsc - MEP	Returning Student	learneremail5@mcmaster.ca	Not-Ready

From the left-hand menu, select Requirements.



Using the Learner Search Requirement filters

To access the learner requirements, click on the menu item called Learner Registration.



Use the Requirement section of the Learner Search to pull up those who fit the filters.

Learner Search

Save Filter

Last Name: Student ID:
 First Name: Expires By:

Registration

Training Session: 2023 - 2024 Legal Visa Status: --Select--

Learner Status: Open Historical New Returning
 Withdrawn N/A

Learner type: Trainee Faculty N/A Student

Registration Status: Pre-Registration Registered Newby
 Not Ready Withdrawn N/A
 Registered - Not in good standing LQA
 Out of Clerkship On-Registration PhD
 Admission Distinct Permanent withdrawal
 Temporary withdrawal

Graduation Year: --Select--
 Undergraduate Status: --Select--
 MD Contributions: --Select--

Requirements

FHS CPR-HCP:	<input type="checkbox"/> Missing	<input type="checkbox"/> Expired	<input type="checkbox"/> Uploaded	<input type="checkbox"/> Completed
FHS HRP:	<input type="checkbox"/> Missing	<input type="checkbox"/> Expired	<input type="checkbox"/> Uploaded	<input type="checkbox"/> Completed
FHS Police Record Check with VISA:	<input type="checkbox"/> Missing	<input type="checkbox"/> Expired	<input type="checkbox"/> Uploaded	<input type="checkbox"/> Completed
FHS E-Module: Violence and Harassment Prevention in the Workplace:	<input type="checkbox"/> Not Completed	<input type="checkbox"/> Completed		
FHS E-Module: STPS, TIPS and PALS:	<input type="checkbox"/> Not Completed	<input type="checkbox"/> Completed		
FHS E-Module: Ergonomics:	<input type="checkbox"/> Not Completed	<input type="checkbox"/> Completed		
FHS C Module: Fall Safety:	<input type="checkbox"/> Not Completed	<input type="checkbox"/> Completed		

Select the requirement statuses you want to look at and then search (Please note, Police VSC requirement has the status "Uploaded").

Requirements

Health Screen Records:	<input type="checkbox"/> Outstanding	<input type="checkbox"/> Cleared	<input type="checkbox"/> Not Cleared	<input type="checkbox"/> Pending	<input type="checkbox"/> Provisionally Cleared
FHS: CPR-HCP:	<input type="checkbox"/> Missing	<input type="checkbox"/> Expired	<input type="checkbox"/> Pending	<input type="checkbox"/> Completed	
FHS: NRP:	<input type="checkbox"/> Missing	<input type="checkbox"/> Expired	<input type="checkbox"/> Pending	<input type="checkbox"/> Completed	
FHS: Police Record Check with VSS:	<input type="checkbox"/> Missing	<input type="checkbox"/> Expired	<input type="checkbox"/> Uploaded	<input type="checkbox"/> Completed	
FHS E-Module: Violence and Harassment Prevention in the Workplace:	<input type="checkbox"/> Not Completed	<input type="checkbox"/> Completed			
FHS E-Module: Slips, Trips and Falls:	<input type="checkbox"/> Not Completed	<input type="checkbox"/> Completed			
FHS E-Module: Ergonomics:	<input type="checkbox"/> Not Completed	<input type="checkbox"/> Completed			
FHS E-Module: Fire Safety Awareness:	<input type="checkbox"/> Not Completed	<input type="checkbox"/> Completed			
FHS E-Module: Code Awareness:	<input type="checkbox"/> Not Completed	<input type="checkbox"/> Completed			
FHS E-Module: WHMIS:	<input checked="" type="checkbox"/> Not Completed	<input type="checkbox"/> Completed			
FHS E-Module: AODA:	<input type="checkbox"/> Not Completed	<input type="checkbox"/> Completed			

Learner Search

Save Filter Search

Last Name: Student #:

First Name: OPHRDC #:

Known By: Hospital Employee #:

Registration

Training Session: 2022 - 2023 Legal/Visa Status: --Select--

Learner Status: Draft Historical New Returning
 Withdrawn N/A

Learner Type: Trainee Student N/A Student

This will bring up a list of those matching the criteria and the individual profiles can be opened to view each learner's own requirement.

How to upload Learner Registration Requirements

Learners can upload their own requirement documents to MedSIS. Many of these requirements must be signed of as completed by the program. This ensures the correct documentation has been uploaded. Adminstrators can also upload the documents on a learner's behalf.

To upload, open the learner's profile and select requirements from the left-hand menu.

Go to the requirement and select "upload" under the missing status.

14 out of 14

Missing

Upload

In the upload window, either drag and drop a file or click on the instructed area to upload. Once uploaded, the system will automatically change the status from “missing” to “pending” or “uploaded”.

The screenshot shows a window titled "FHS: CPR-HCP" with a close button. It contains an "Attachment File" section with a dashed border and the text "Drag file or click to upload." Below this are two date input fields: "Issue Date:" and "Expiry Date:". The "Status:" is set to "Missing" in a red box. There is a "Comments:" text area. At the bottom right, there are "Save" and "Close" buttons.

Enter the issue date. The programs have informed MedSIS of the timeframe for expiration dates and the system will automatically calculate the expiry date using those rules.

The screenshot shows the same window as above, but now with a file "Test_Upload_Word Doc.docx" uploaded. The "Issue Date:" is set to "02-Sep-2022" and the "Expiry Date:" is set to "02-Sep-2024". The "Status:" is now "Pending".

Enter any comments, if needed, and save. The learner can view these comments.

The screenshot shows the same window as above, but now with a "Comments:" text area containing the text "Leave comments here if needed." A red arrow points to the "Save" button at the bottom right.

This requirement is now uploaded and needs to be marked as “completed” by the program.

How to mark Learner Registration Requirements as Completed

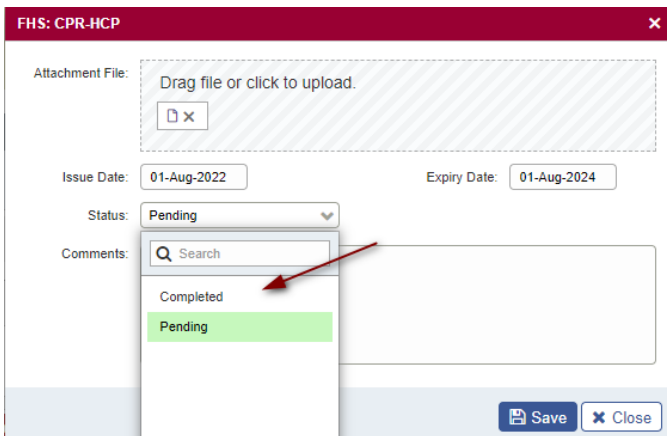
The suggested way to mark Learner Registration requirements as completed is to search using the requirement filters. Searching on requirements “missing”, “uploaded” (for police VSC), “pending” “expired” or “not completed” will pull up learner requirements that need to be marked completed.

Once you search and have a list of those matching the criteria, the individual profiles can be opened to view each learner’s own requirement.

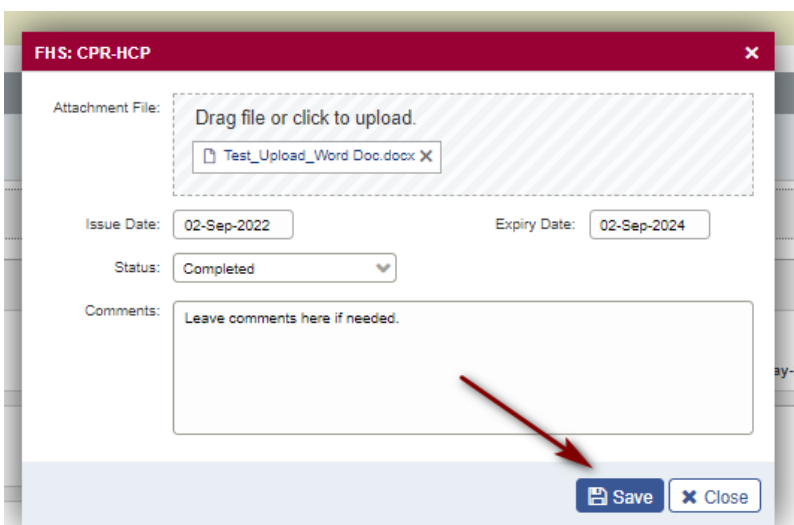
To mark the requirement as completed, click “edit”.



In the upload window, click the status drop down and select “completed”.



This will change the status of the upload to “completed”. Click “Save” to finalize the requirement.



The requirement will then change to green and be marked “completed”.

✓ Completed 1 out of 14

FHS: CPR-HCP Completed ✓

Document is up to date. It will expire on **02-Sep-2024**. ✎ Edit ⋮

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](#)