



Welcome to MedTrainer

Here's What You Can Expect from MedTrainer's software Onboarding and Implementation.

Our Customer Success Team will guide you through this thoughtfully designed process to ensure a seamless setup. Rest assured that we have your success in mind and we are committed to supporting you every step of the way.

Meet <i>Within one business day of contract signing</i>	Receive login information	Meet your onboarding team	Set goals for your organization and make a plan to achieve them
Prepare <i>Start within 7 business days if you're ready</i>	Add employee rosters	Determine access levels	Configure your account
Train <i>Start within 10 business days if you're ready</i>	Learn how to personalize your account	Receive individual module training	Finalize plan for launch, including how to support your users
Go Live <i>Start within 14 business days if you're ready</i>	Launch to end users	Incorporate tracking and reporting into your workflow	Uplevel your experience with an additional support package
Stay in Touch <i>For the remainder of our relationship</i>	Learn best practices and how your peers are using MedTrainer	Get product and compliance industry updates bimonthly via email	Join our quarterly customer webinars

Meet

Account Creation and Introduction

- ✔ You'll receive a welcome email within one business day, introducing your onboarding team with their contact information.
- ✔ You will be contacted by phone to schedule the onboarding call and confirm you can log in.
- ✔ You'll fill out a pre-onboarding eight-question survey that helps your onboarding team with your company goals and streamlines the onboarding process for improved efficiency and impact.

Prepare

Onboarding Call

Here's what you can expect:

- ✔ Spend about an hour on the call.
- ✔ Receive an overview of the onboarding process.
- ✔ Review your contract, including confirming products and user quantity.
- ✔ Complete training on how to use the Organization Management module, including setting up company and employee settings, locations, and positions.
- ✔ Receive a spreadsheet to complete your employee roster so your onboarding team can add employees to your account (this must be done prior to training).
- ✔ Schedule future sessions of in-depth module training.



Train

Process varies based on the subscriptions you purchased.

MedTrainer Learning	MedTrainer Compliance	MedTrainer Credentialing
<p>One-hour training for super admins and admins with overview of the following modules:</p>	<p>Two one-hour training sessions for super admins and admins with overview of the following modules:</p>	<p>Two one-hour training sessions for super admins and admins with overview of the following modules:</p>
<ul style="list-style-type: none"> • Course Library • Admin Dashboard • Student Dashboard • Onboarding Path • Reports • Company Settings 	<p>First Training</p> <ul style="list-style-type: none"> • Documents & Policies • Contract Management • Safety Plans • Admin Dashboard • Student Dashboard <p>Second Training</p> <ul style="list-style-type: none"> • Incident Reports • SDS Management • OSHA / HIPAA Toolkits • Onboarding Path • Reports • Company Settings 	<p>First Training</p> <ul style="list-style-type: none"> • Credentialing Locations • Provider Profiles • Exclusions • Enrollments Part 1 <p>Second Training</p> <ul style="list-style-type: none"> • Enrollments Part 2 • Admin Dashboard • Enrollment Dashboard • Documents • Reports • Company Settings



Go Live

As part of MedTrainer's basic support package, all customers receive:

- ✓ Access to the training video library
- ✓ Access to the Support Center, available 24/7
- ✓ Live training via video (two hours per year)

Customers who purchase a standard support package will receive everything above, along with:

- ✓ Additional user configuration, a designated customer success manager, and up to five hours of live training via video
- ✓ MedTrainer Learning customers will get help with creating course bundles and onboarding paths
- ✓ MedTrainer Compliance customers will get help configuring incident reports
- ✓ MedTrainer Credentialing customers will get help configuring reports, and information loading

Customers who purchase a premium support package will receive everything above, along with:

- ✓ MedTrainer Learning customers will get help assigning courses and preparing for surveys
- ✓ MedTrainer Compliance customers will get help uploading documents
- ✓ MedTrainer Credentialing customers will get help creating a workflow for uploading and managing provider insurance information
- ✓ Up to 10 hours of live training via video

Stay in Touch

Stay up to date on the latest product information in the Support Center. [Go.](#)

Watch step-by-step training videos. [Watch Now.](#)

Get monthly updates in the customer newsletter. [Subscribe.](#)

Contact Customer Service

Email: support@medtrainer.com
Phone: 844-596-6553

Contact Sales

Phone: 888-337-0288