



# Welcome to MedTrainer

## Here's What You Can Expect in the First 30 Days

Welcome to our carefully crafted onboarding process, thoughtfully designed to guide you through a seamless setup. Rest assured that we have your success in mind and we're committed to supporting you every step of the way.

<b>Kick-Off</b> <i>Within 24 hours of contract signing</i>	Receive login information	Get access to on-demand training	Set goals for what you'll accomplish
<b>Get Started</b> <i>Start within 7 days if you're ready</i>	Add employee rosters	Determine access levels	Configure your account
<b>Train</b> <i>Start within 10 business days if you're ready</i>	Learn how to personalize your account	Work with your CSM in individual modules	Configure automations with your CSM
<b>Go Live</b> <i>Start within 14 business days if you're ready</i>	Access the Training Video Library	Get questions answered in the Support Center	Uplevel your experience with an additional support package
<b>Stay in Touch</b> <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 customers webinars

# Kick-Off

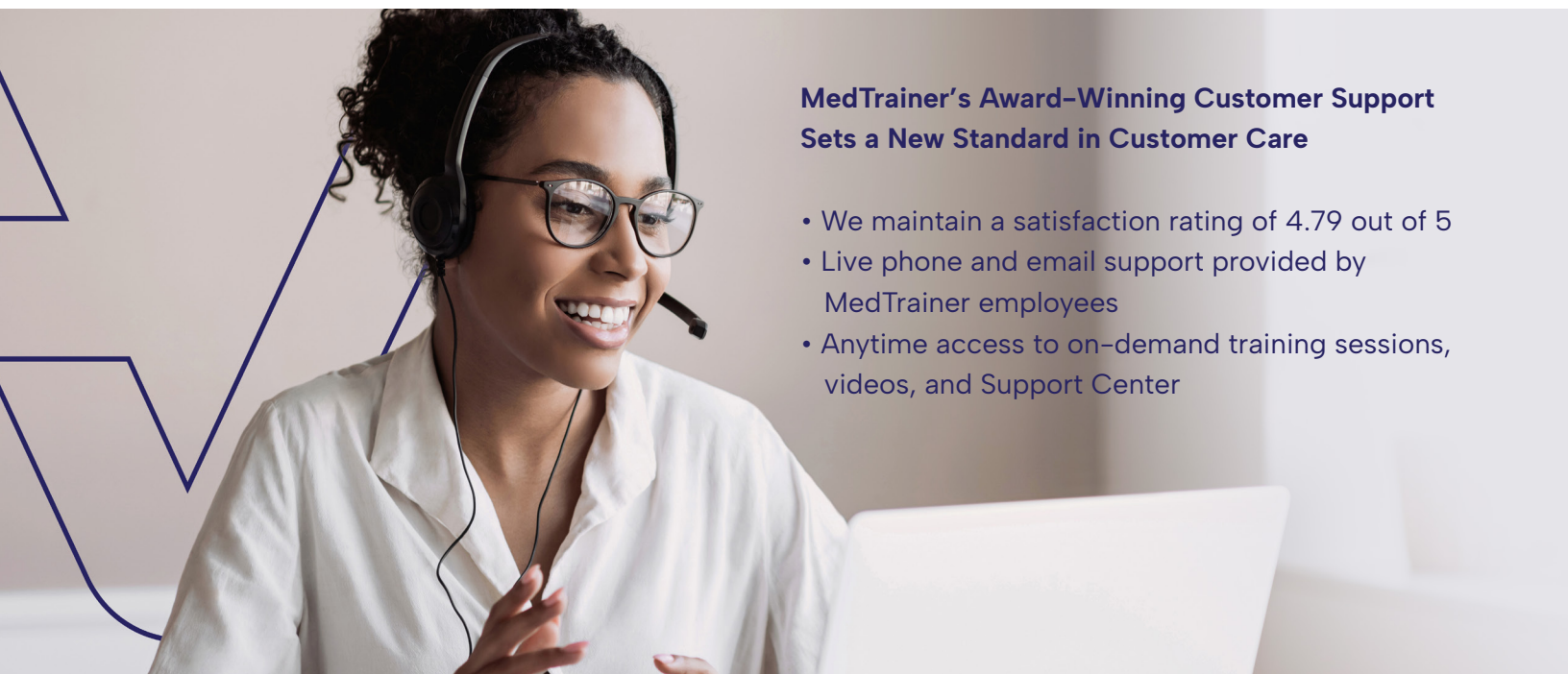
## ACCOUNT CREATION AND INTRODUCTION

- ✓ You'll receive a welcome email and platform login within one business day.
- ✓ **Self-Paced** customers (organizations with less than 50 employees) are empowered to complete onboarding at your own pace. You will immediately receive all information via email — there will not be an onboarding phone call.
- ✓ **Basic, Standard, and Premium Support** customers will be contacted by phone to schedule an onboarding call. You'll fill out a pre-onboarding eight-question survey that helps your onboarding team meet your organization's goals.

# Get Started

## SETTING UP THE PLATFORM

- ✓ Add your employee roster to the spreadsheet provided via email and return to your CSM (this must be done prior to training). Your CSM will add employees to your account and complete the initial set-up of the Organization Management module.
- ✓ **Self-Paced** customers can get started immediately with self-guided onboarding. Via email, you'll find out about live training sessions and how to access MedTrainer's award-winning customer support.
- ✓ **Basic, Standard, and Premium Support** customers will spend about an hour on the initial onboarding call, where you will:
  - Get an overview of the onboarding process.
  - Review of your contract, including confirming products and user quantity.
  - Schedule future training sessions.



### MedTrainer's Award-Winning Customer Support Sets a New Standard in Customer Care

- We maintain a satisfaction rating of 4.79 out of 5
- Live phone and email support provided by MedTrainer employees
- Anytime access to on-demand training sessions, videos, and Support Center

# Train

## HERE'S WHAT TO EXPECT (PER PRODUCT)

	MLearning	MCompliance	MCredentialing
Self-Paced	<p>Group and on-demand training covering the following topics:</p> <ul style="list-style-type: none"> <li>• Course Library</li> <li>• CE Course Library</li> <li>• Group Learning</li> <li>• Admin Dashboard</li> <li>• Student Dashboard</li> </ul>	<p>Group and on-demand training covering the following topics:</p> <ul style="list-style-type: none"> <li>• Documents &amp; Policies</li> <li>• Incident Reporting</li> <li>• Contract Management</li> <li>• Safety Plans</li> <li>• SDS Management</li> <li>• Reporting</li> </ul>	<p>Group and on-demand training covering the following topics:</p> <ul style="list-style-type: none"> <li>• Credentialing Locations</li> <li>• Provider Profiles</li> <li>• Credentialing Documents</li> <li>• Credentialing Packets</li> <li>• Credentialing Reporting</li> </ul>
Basic, Standard, and Premium Support	<p>Up to one hour of individual training for super admins and admins on the following topics:</p> <ul style="list-style-type: none"> <li>• Course Catalog</li> <li>• Admin Dashboard</li> <li>• Student Dashboard</li> <li>• Onboarding Path</li> <li>• Reporting</li> <li>• Settings</li> <li>• Company Settings</li> </ul>	<p>Up to two hours of individual training for super admins and admins on the following topics:</p> <ul style="list-style-type: none"> <li>• Documents &amp; Policies</li> <li>• Contract Management</li> <li>• Safety Plans</li> <li>• Admin Dashboard</li> <li>• Student Dashboard</li> <li>• Incident Reporting</li> <li>• SDS Management</li> <li>• Onboarding Path</li> <li>• Reporting</li> <li>• Settings</li> </ul>	<p>Up to two hours of individual training for super admins and admins on the following topics:</p> <ul style="list-style-type: none"> <li>• Credentialing Locations</li> <li>• Provider Profiles</li> <li>• Exclusions</li> <li>• Enrollments</li> <li>• Admin Dashboard</li> <li>• Credentialing Documents</li> <li>• Credentialing Reporting</li> <li>• Settings</li> </ul>

# Go Live

## SIMPLIFYING COMPLIANCE STARTS NOW

### Customers who purchase a standard support package will receive:

- ✓ 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:

- ✓ MedTrainer Learning customers will get help assigning courses and completing an audit
- ✓ 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 Here](#)

Watch step-by-step training videos.

[Watch Now](#)

Get monthly updates in the customer newsletter.

[Subscribe](#)

#### Contact Customer Service

Email: [support@medtrainer.com](mailto:support@medtrainer.com)  
Phone: 844-596-6553

#### Contact Sales

Phone: 888-337-0288