

Getting Started with Compli® Office Manager



1. Reset your password by selecting the link.

2. Create a password unique to you.

← [Compliance Training Partners] L...



Username:

mmmalkowski@sbcglobal.net

To set your password, visit the following address:

<https://compliancepartners.com/wp-login.php?>

[action=rp&key=u2ddRR0afS7Ub57n6c91&login=mmalkowski%40sbcglobal.net](https://compliancepartners.com/wp-login.php?action=rp&key=u2ddRR0afS7Ub57n6c91&login=mmalkowski%40sbcglobal.net)

<https://compliancepartners.com/account/>

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Delete



Archive



Move



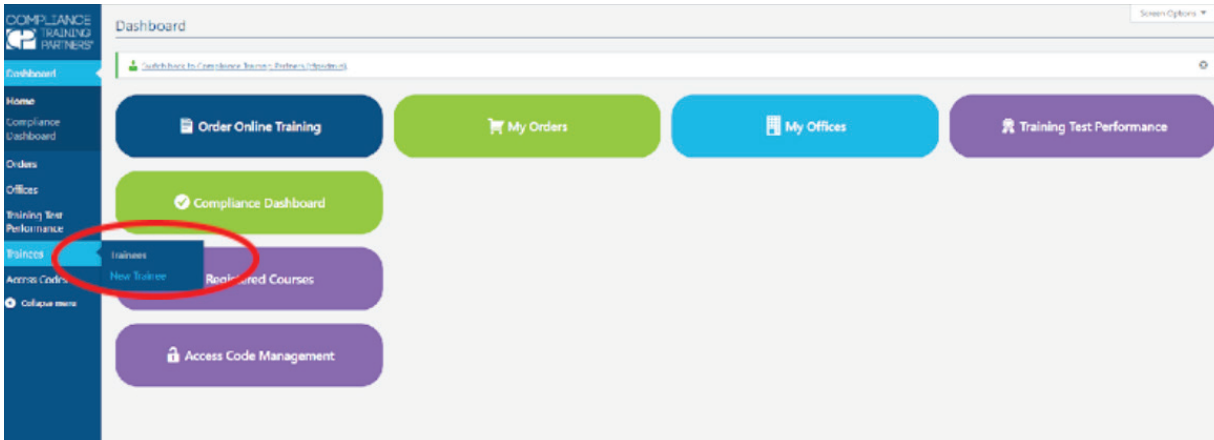
Forward



More

3. Adding an office - if your account does not have any offices, please reach out to JShaffer@compliancetrainingpartners.com to make sure your offices are not already in the system. Add new offices if instructed to do so.

4. If your offices are already in the system, so are your trainees. If they are not in the system then add new trainees by selecting **“Trainees”** from the left-hand navigation bar and then **“New Trainee”**.



5. Manually enter trainees by completing all fields and then click **“Add New Trainee”**

Form fields for adding a new trainee:

- Username (required)
- Email (required)
- First Name
- Last Name
- Office
- Password
- Send User Notification Send the new user an email about their account.

6. ...or import trainees using the Excel Sheet Template.

Upload New Trainees via Spreadsheet

Office: test office 2 – 126 Main Street

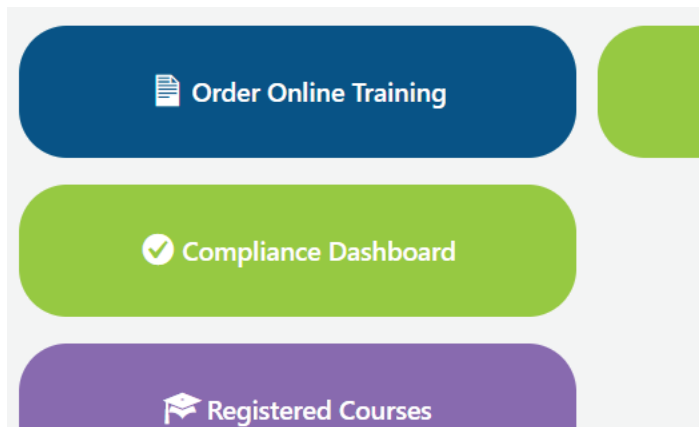
Upload Sheet: Choose File No file chosen
[Example Sheet Template](#)

Import

	A	B	C	D
1	First Name	Last Name	Email	
2	John	Doe	johndoesdfasdfsdf@example.com	
3	Jane	Doe	janedoesasdasdasddsaf@example.com	
4				
5				
6				
7				
8				

Ordering Online Training

7. From your Dashboard, select “**Order Online Training**”.



8. Select a training date and office. Check box “**Is this order for specific trainees?**” if the order is to be assigned to specific trainees. In the trainee field select the name(s) of those who need training.

Order #101868 details

General

Training date:

2021-06-17

Office:

Test office 1 – 123 Elm St

Is this order for specific trainees?

Trainees:

× Jane Doe × John Smith × John Doe

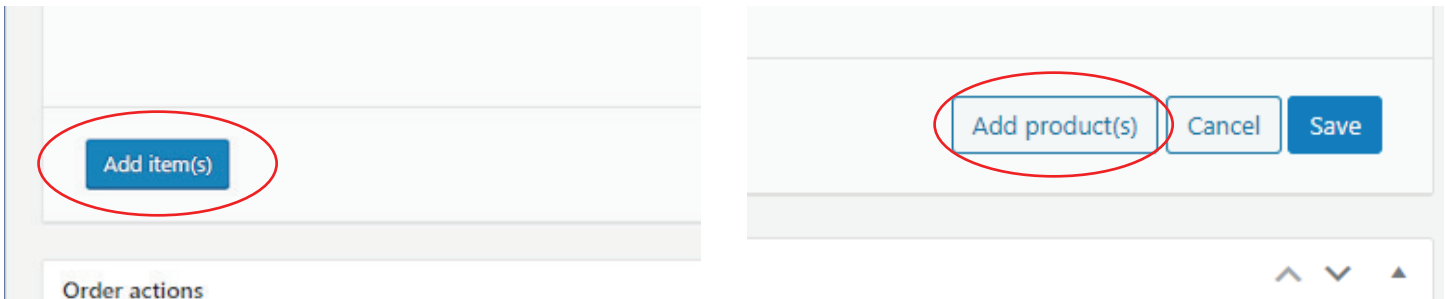
Quantity of items needs to match number of trainees

Email address to send order and access codes to:

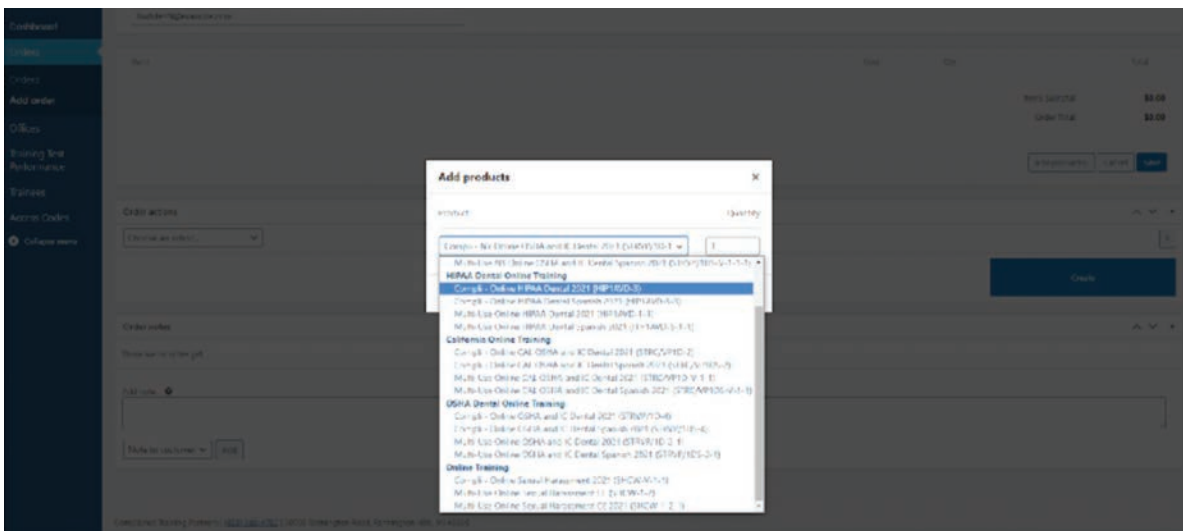
email@example.com

Item

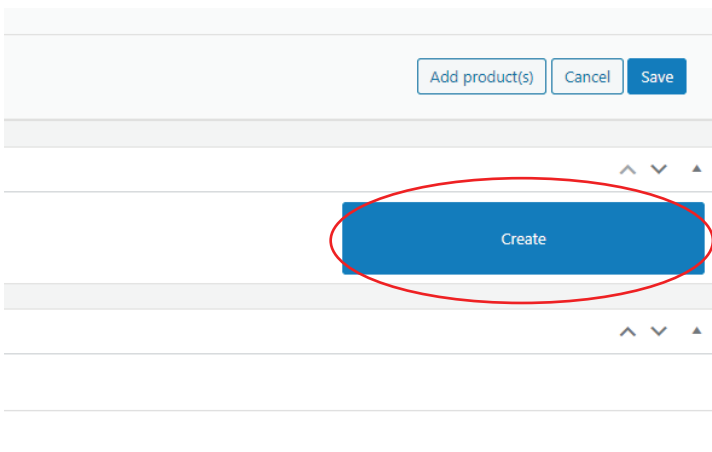
9. Select **“Add Items”** then **“Add Products”**.



10. Select the course and click **“Add”**. Change the quantity to match the number of trainees selected. *Note that only 1 course may be ordered when assigning a course to specified trainees.



11. Complete the email field with the email address of the person receiving the order. Trainees selected will receive an email stating they have been assigned training. Then click on **“Create”** to complete your order.

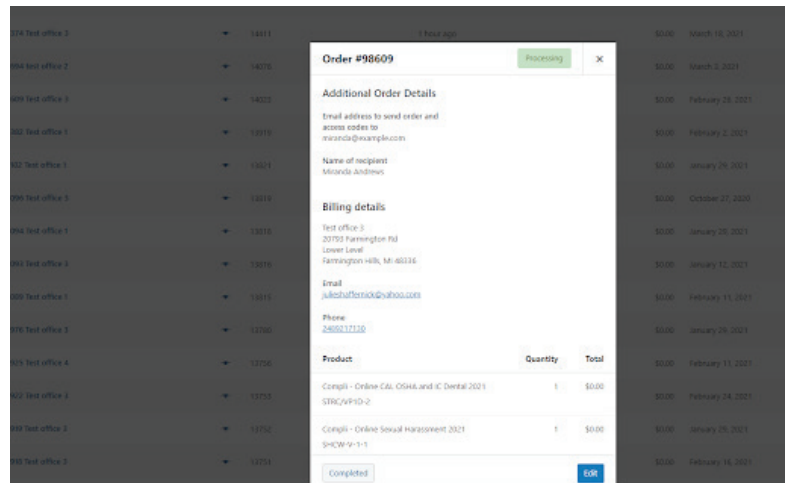
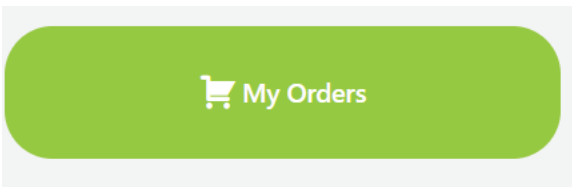


12. The assigned trainees will receive the email below.

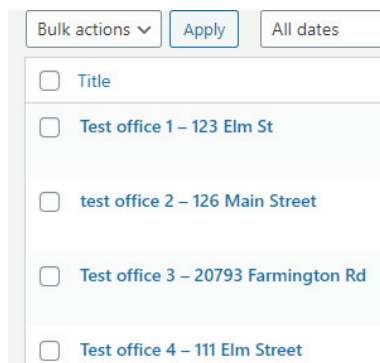
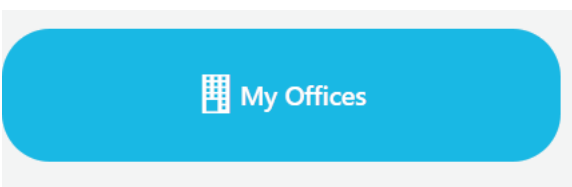


Ordering Online Training

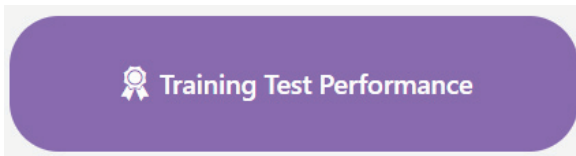
“My Orders” – These are snapshots of all orders placed. Selecting the “Eye” icon will show you a glimpse of the order details















“My Offices” – View your office location(s) and its associated trainees.



“Training Test Performance” — View **all completed** training and certificates.



Andrews	Miranda	miranda@example.com	Online Sexual Harassment CE 2021	January 27, 2021	P	Julie Shaffer	CE Course, Compli, Henry Schein Dental	  
Andrews	Miranda	miranda@example.com	Compli – Online HIPAA Dental 2021	January 27, 2021	P	Julie Shaffer	CE Course, Compli, Henry Schein Dental	  
White	Betty	bwhite99@example.com	Online Sexual Harassment CE 2021	January 27, 2021	F	Julie Shaffer	CE Course, Compli, Henry Schein Dental	  
Jones	Delores	djones@sample.com	Compli – Online HIPAA Dental 2021	January 27, 2021	P	Julie Shaffer	CE Course, Compli, Henry Schein Dental	  



INDIVIDUAL CEU TRANSCRIPT

A live interactive presentation

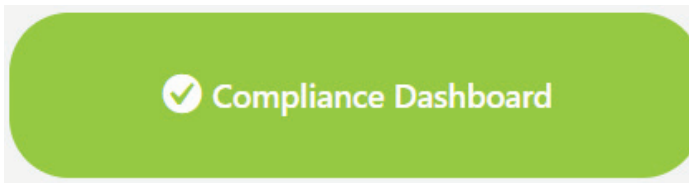
Provider Number 217695 - 2 CEUs Awarded

Registrant's Name: Betty White

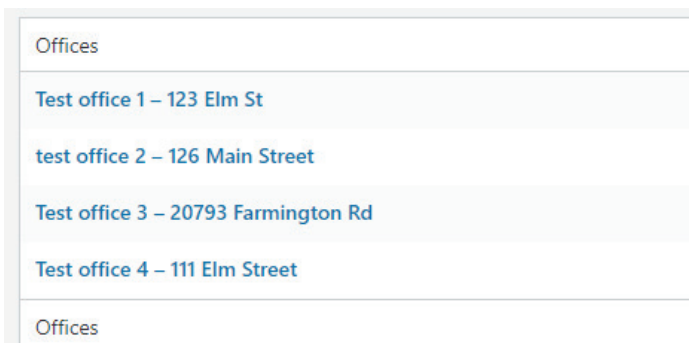
Office: Test office 3

Course Name: Sexual Harassment in the Healthcare Workplace

“Compliance Dashboard” - This is a report of your offices' compliance.



1. Select the office.



2. Complete in-office infection control audits.

<h3>Weekly Eyewash Check</h3> <p>Thumbnail</p> <p>Last Check Date: 2021-02-23 00:00:00 alvarez </p> <p>Order Update</p>	<h3>Monthly Fire Extinguisher Check</h3> <p>Thumbnail</p> <p>Last Check Date: 2021-01-29 00:00:00 smith </p> <p>Order Update</p>
<h3>Weekly Spore Test of Autoclaves</h3> <p>Thumbnail</p> <p>Last Check Date: 2021-01-29 00:00:00 alvarez </p> <p>Order Update</p>	<h3>Quarterly Dental Unit Water Testing</h3> <p>Thumbnail</p> <p>Last Check Date: 2021-03-02 00:00:00 alvarez </p> <p>Order Update</p>

3. View all audit checklists completed from the app or an employee's dashboard.

Latest Compliance Checklist Submissions

<h3>OSHA Compliance Audit Checklist</h3> <p>No submissions</p>	<h3>HIPAA Compliance Audit Checklist</h3> <p>No submissions</p>
<h3>Detailed Infection Control Audit Checklist</h3> <p> 39 / 68 In Compliance</p> <p>User: Julie Shaffer Date: January 28, 2021</p> <p>View Details</p>	

4. View all trainee's performance in one place.

User	Courses
Betty White	System Courses Online Sexual Harassment CE 2021 Completed: 2021-01-27 18:27:05 Compli – Online OSHA and IC Dental 2021 Not complete Compli – Online HIPAA Dental 2021 Not complete WA/OR OSHA and Infection Control 2020 Not complete Manually Entered Trainings CPR submitted on 2021-01-08 00:00:00 Pain Managementsubmitted on 2021-01-28 00:00:00
Julie shaffer	System Courses None Manually Entered Trainings None
Miranda Andrews	System Courses Compli – Online HIPAA Dental 2021 Completed: 2021-01-27 18:29:58 Online Sexual Harassment CE 2021 Completed: 2021-01-27 18:30:52 Compli – Online OSHA and IC Dental 2021 Completed: 2021-01-27 18:31:34 Compli – Online CAL OSHA and IC Dental 2021 Not complete Manually Entered Trainings CPR submitted on 2020-11-23 00:00:00
Michelle Stone	System Courses Compli – Online OSHA and IC Dental 2021 Not complete Compli – Online HIPAA Dental 2021 Not complete Manually Entered Trainings None