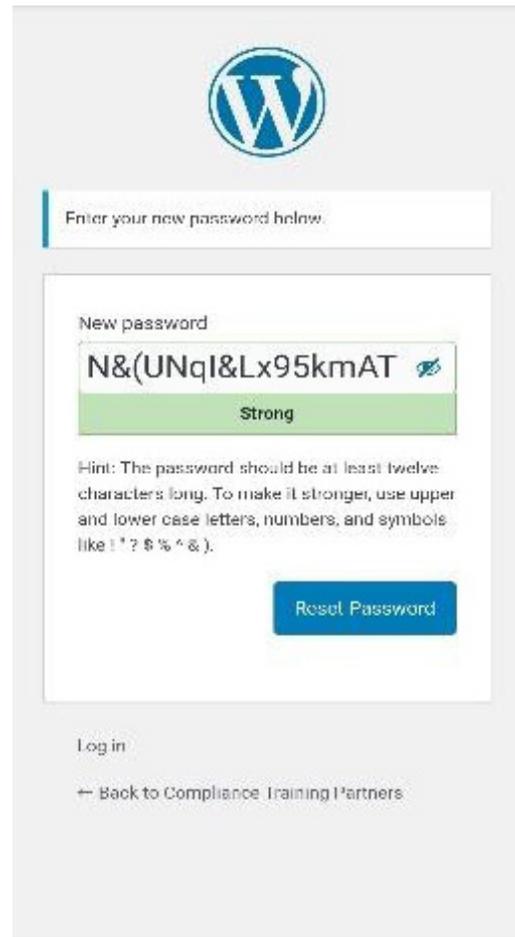


# Getting Started with Compli® Office Manager



1. Reset your password by selecting the link.

2. Create a password unique to you.



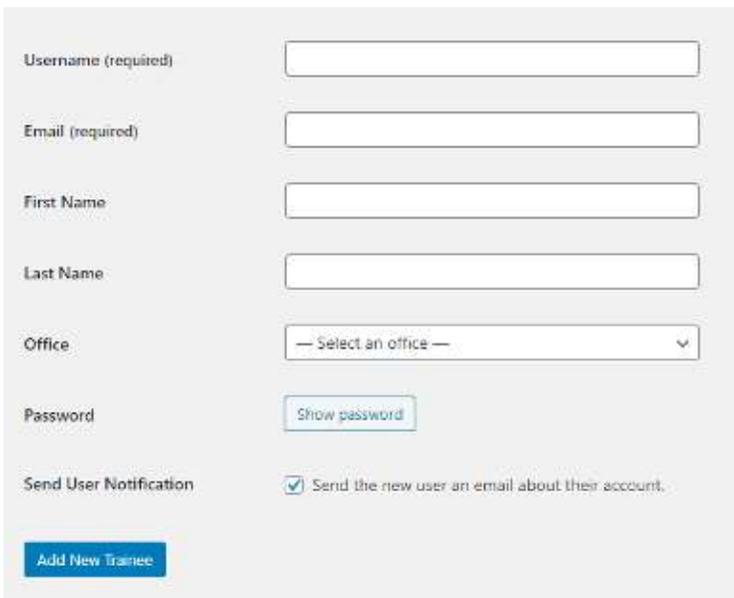
3. Adding an office - if your account does not have any offices, please reach out to HTerry@compliancetrainingpartners.com to make sure your offices are not already in the system. Add new offices if instructed to do so.

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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”**

A screenshot of the 'Add New Trainee' form. The form contains the following fields: 'Username (required)' with a text input field; 'Email (required)' with a text input field; 'First Name' with a text input field; 'Last Name' with a text input field; 'Office' with a dropdown menu showing '— Select an office —'; 'Password' with a text input field and a 'Show password' button; and 'Send User Notification' with a checked checkbox and the text 'Send the new user an email about their account.' At the bottom of the form is a blue button labeled 'Add New Trainee'.

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

Upload New Trainees via Spreadsheet

Office: test office 2 – 126 Main Street

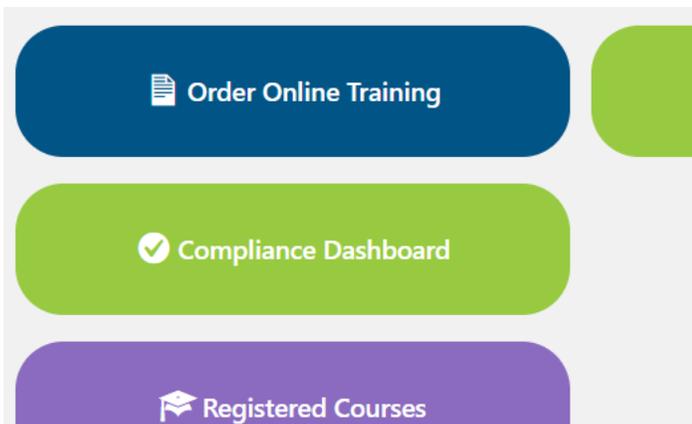
Upload Sheet: Choose File No file chosen  
[Example Sheet Template](#)

Import

	A	B	C	D
1	First Name	Last Name	Email	
2	John	Doe	<a href="mailto:johndoesdfasdfsdf@example.com">johndoesdfasdfsdf@example.com</a>	
3	Jane	Doe	<a href="mailto:janedoesasdasdasddfsaf@example.com">janedoesasdasdasddfsaf@example.com</a>	
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

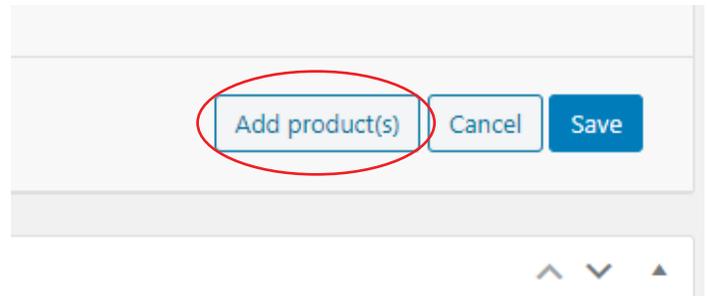
Quantity of items needs to match number of trainees

Email address to send order and access codes to:

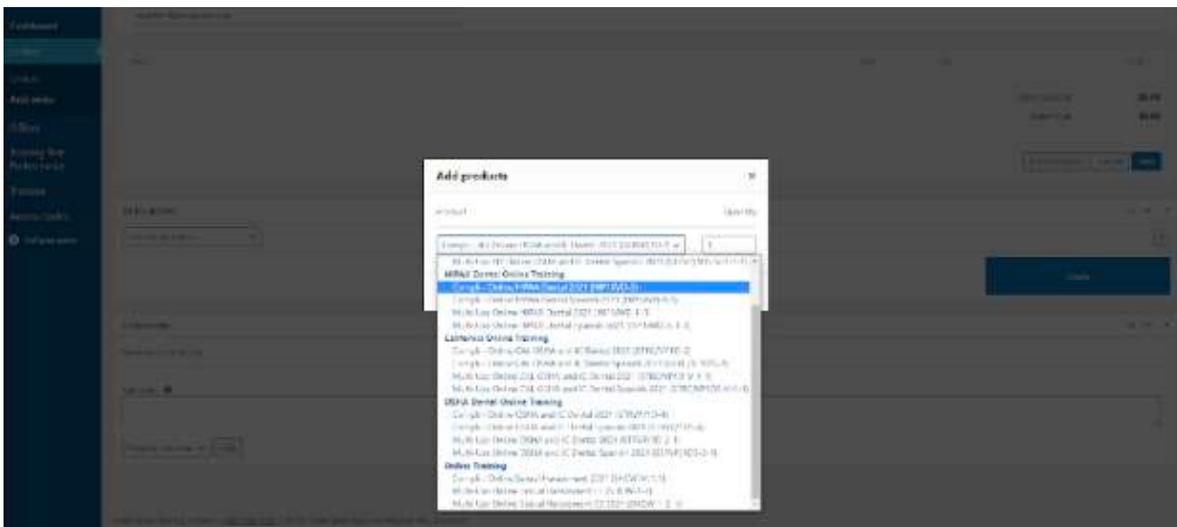
email@example.com

Item

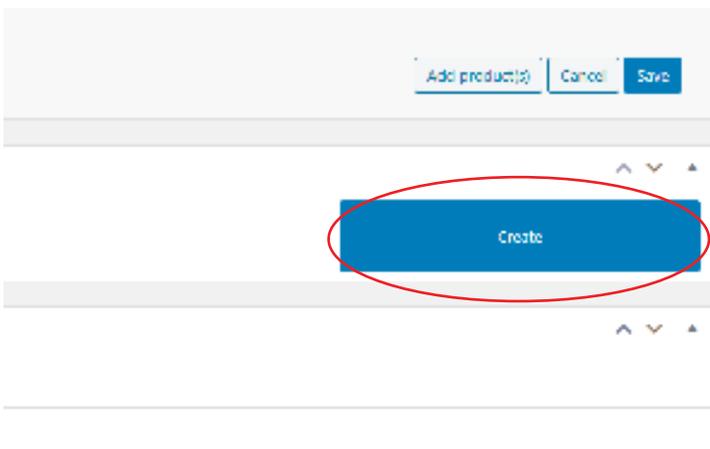
9. Select **“Add Items”** then **“Add Products”**.



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.

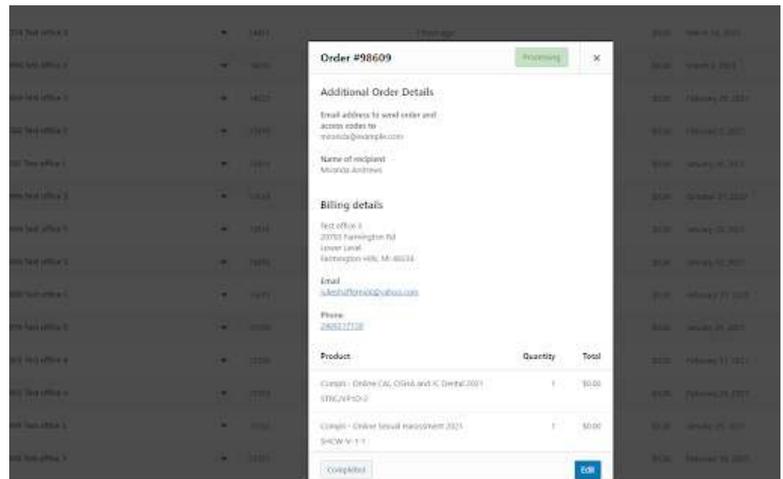
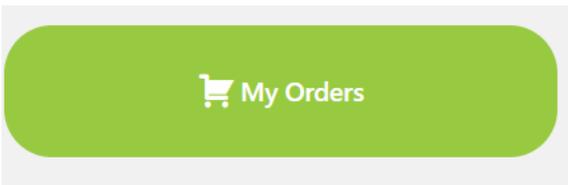


12. The assigned trainees will receive the email below.

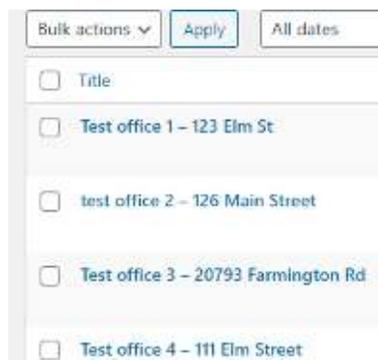


## Ordering Online Training

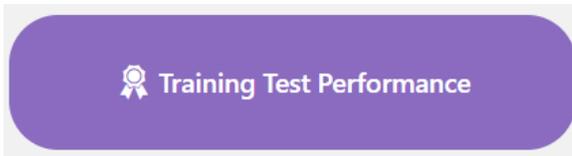
**“My Orders”** – These are snapshots of all orders placed. Selecting the “Eye” icon will show you a glimpse of the order details



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



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



Andrew	Miranda	miranda@example.com	Online Sexual Harassment CE 2021	January 27, 2021	P	Jake Shaffer	CE Course, Compl, Henry Schain Dental	  
Andrew	Miranda	miranda@example.com	Compl - Online NRAA Dental 2021	January 27, 2021	P	Jake Shaffer	CE Course, Compl, Henry Schain Dental	  
White	Betty	betty99@example.com	Online Sexual Harassment CE 2021	January 27, 2021	F	Jake Shaffer	CE Course, Compl, Henry Schain Dental	  
Jones	Dalene	dalene@example.com	Compl - Online NRAA Dental 2021	January 27, 2021	P	Jake Shaffer	CE Course, Compl, Henry Schain Dental	  



### INDIVIDUAL CEU TRANSCRIPT

A live interactive presentation

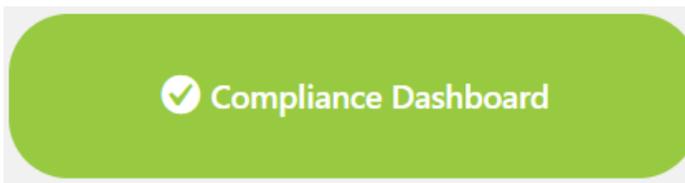
Provider Number 217695 - 2 CEUs Awarded

**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.

The screenshot displays four audit checklist cards in a 2x2 grid. Each card includes a 'Thumbnail' placeholder, the last check date and time, the user's name, a status indicator (green checkmark or red exclamation mark), and 'Order' and 'Update' buttons.

- Weekly Eyewash Check:** Last Check Date: 2021-02-23 00:00:00, User: alvarez, Status: In compliance (green checkmark).
- Monthly Fire Extinguisher Check:** Last Check Date: 2021-01-29 00:00:00, User: smith, Status: In compliance (green checkmark).
- Weekly Spore Test of Autoclaves:** Last Check Date: 2021-01-29 00:00:00, User: alvarez, Status: Not in compliance (red exclamation mark).
- Quarterly Dental Unit Water Testing:** Last Check Date: 2021-03-02 00:00:00, User: alvarez, Status: In compliance (green checkmark).

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

The screenshot shows a dashboard with three main sections. The top section, 'Latest Compliance Checklist Submissions', contains two cards for 'OSHA Compliance Audit Checklist' and 'HIPAA Compliance Audit Checklist', both showing 'No submissions'. The bottom section, 'Detailed Infection Control Audit Checklist', features a pie chart and summary statistics.

**OSHA Compliance Audit Checklist:** No submissions

**HIPAA Compliance Audit Checklist:** No submissions

**Detailed Infection Control Audit Checklist:**

- Legend: Not in compliance (red), In compliance (green)
- Pie chart showing 39 / 88 In Compliance
- User: Julie Shaffer
- Date: January 28, 2021
- View Details button

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

User	Courses
Betty White	<b>System Courses</b> 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 <b>Manually Entered Trainings</b> CPR submitted on 2021-01-08 00:00:00 Pain Managementsubmitted on 2021-01-28 00:00:00
Julie shaffer	<b>System Courses</b> None <b>Manually Entered Trainings</b> None
Miranda Andrews	<b>System Courses</b> 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 <b>Manually Entered Trainings</b> CPR submitted on 2020-11-23 00:00:00
Michelle Stone	<b>System Courses</b> Compli – Online OSHA and IC Dental 2021 Not complete Compli – Online HIPAA Dental 2021 Not complete <b>Manually Entered Trainings</b> None