MTS **Administrator Instructions**

Welcome

MTS Lab Training and Competency programs equip labs with a comprehensive online resource for training staff and building competency.

As an administrator for your account, you can add, edit, delete users, send email notifications, reset tests and create and print reports for training and competency documentation. Accounts can have more than one administrator which allows for added flexibility in managing the account.

Administrators can also group users by department, location, or shift to make tracking progress quick and simple. With groups, administrators are empowered with increased account administration flexibility and coordination.

Users and administrators have unlimited access 24/7 from home, work, or school to:

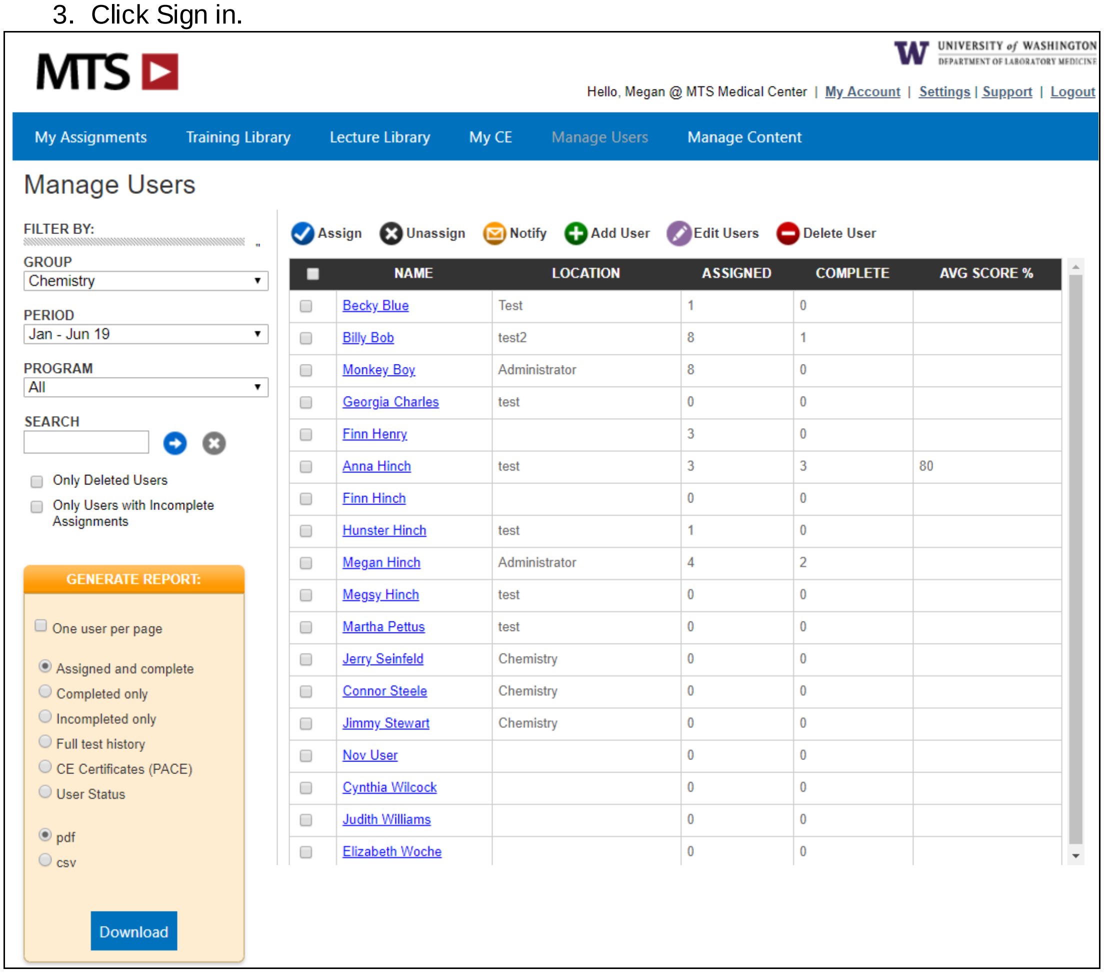
- Training courses with engaging video and animation worth over 50 hours of continuing education credit. Specimen images make an ideal reference tool.
- Competency Assessment tests for meeting regulatory requirements. Test questions change twice annually.

Getting Started

Log In

To access the account, Administrators and Users must log in:

1. Open an internet browser window and go to www.medtraining.org
2. Log in with your e-mail/UserID and password provided by MTS.
3. Click Sign in.

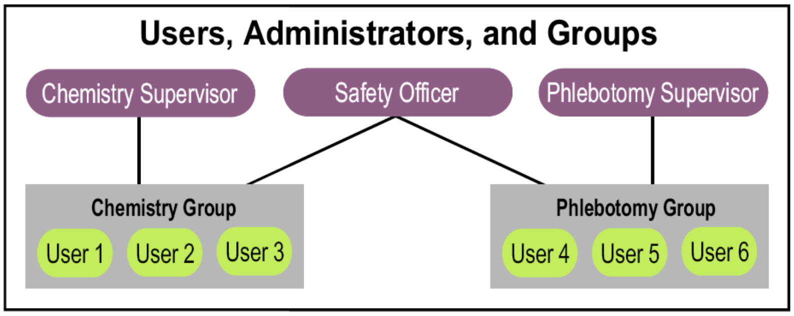


Administrator Menu:

After log in, you will see the screen shown above. From here you will be able to add/edit/delete users, assign tests, send email notifications, create reports, etc. (Users do not have access to the Manage tabs.)

Step 1: Organizing your account

A good way to get started is to determine how you would like to organize your account. For larger accounts (30+ users) it might be helpful to arrange your account into groups such as: Core Lab, Phlebotomy, 3rd Shift, etc. The diagram below illustrates a sample account that utilizes groups to organize and manage their account. You may add as many groups as needed and at anytime.



To set up groups within your account:

1. Login to your account, click on “Settings” in the upper right corner
2. From the Select a group drop box click on “Add a new group”
3. Name your group, assign a due date if desired, select the Programs that should be turned on for the new group and hit Save.

Administrators: There is no limit to the number of administrators on each account. Larger accounts might find it easier to assign one or two administrators to each group, and have one person as the primary administrator who is set up over all groups. You may set up administrative duties any way that works best for your facility.

To add administrators:

Follow the Instructions below to add a new user. To set up the new user as an administrator click the box that says, “Request Admin Permissions”, select which group(s) they should have access to and click Save.

Step 2: Adding your users

In order to access the Lab Training and Competency resources, a User must have an account. Accounts can only be created by an Administrator using the Add User function from the Admin Menu. To add a user:

Log in to your account, select Add User and enter:

1. Your new users’ first and last names.
2. Email/user id - a valid email address is recommended as this will enable other useful features of the system, such as E-mail Notification. (If a user does not have email, a unique UserID should be created such as lisarobbins76 or an employee ID#)
3. Location(optional) - This can be used to organize users by location, specialization, shift, etc.
4. Group - If an Administrator manages more than one group, users must be assigned to a group. Groups are useful for managing large accounts with multiple Administrators.
5. Password - Choose a password for your user. You may give all your users the same initial password, such as 123456 or password, or you can use a unique password such as an employee id #. Users can then personalize their password by clicking on their user id in the upper right corner after they login for the first time. Passwords must be at least 6 characters long.
6. Assign Tests - From here, or you may wait until all users have been added to process assignments in a batch, which we will go over in the next step.

Hint: If you have more than 10 users to add this can be pretty time consuming. Instead of entering your users one by one please email customer service at support@medtraining.org to request a User Upload Spreadsheet.

You will enter all of your users on the spreadsheet, return to MTS and your users will be uploaded to your account that same day.

Step 3: Assigning tests

Tests can be assigned/unassigned to individual users or to an entire group.
From Manage Users

1. From the left side of the page select the group from your Group drop box
2. Click the box next to your user(s) or click the top box to select all users.
3. Click the Assign button
4. Click the test(s) you would like to assign and hit the Assign button.

You may un-assign tests in the same order as above, and by clicking the Unassign button

Hint: To verify that the tests "took" click on the Users' name. You will then see all tests that have been assigned to this user.

Assignment Lists: If you frequently assign the same group of tests you may want to build an assignment list so that you can easily assign to new users.

1. Follow steps above to select your group and users and click Assign.
2. From the Assignment Lists drop box select to Create New
3. Name your Assignment List
4. Click the box next to the tests you would like to add to your new list
5. Click to Save
6. You can then select all tests from your assignment list and click the Assign button to assign to your selected users or click Cancel to close the Assign window.

Step 4: Notify users of assigned tests

Email notification is a method for notifying users that they have been assigned competency or training tests. Notification emails are generated within the system and include a log-in link, which allows a user to log in simply by clicking on the link.
To send an email notification:

1. From the Group drop box on the left side of your page select the group you would like to notify
2. Click the box next to the user(s) you would like to notify or click the top box to notify all users
3. Click the Notify icon Notify above your user list
4. Select the email template you would like to send, or create a new one
5. Optionally you can click the Auto Notify box to set up the email notification to be sent to the selected users daily, weekly or monthly. The auto reminder will continue to be sent until the user has completed all of their current assignments.
6. Hit send, a list will generate with users that an email has been sent to.

   Hint: To see a sample notification email, the administrator should select only his/her own name and send a test email.

To turn off auto notifications:

1. From Manage Users, select your Group and click the box next to your user(s)
2. Click "Edit Users" above your user list
3. Change the Auto Notify Frequency to Off
4. Click to Save

Step 5: Reset test scores

Administrators can reset test scores for their users.

1. From the Manage Users screen notice the Avg Score% column. If a user has any test scores below 80% their Avg Score will be highlighted in red.

2. Click on a user's name, you will see all assigned and completed tests. Completed tests will have the completed score and date
3. Click the box next to any test scores you would like to reset and then click "Reset Score" at the top of the page. Or, you can click on the individual test score to view the results and then click "Retake Test" link.

Administrators may also grant their users permission to reset their own test scores.

1. Click "Settings" in the right side of your screen
2. Select the group
3. Click the Edit button
4. You may grant users the rights to reset training tests, competency and/or Documents. Hit Save.

Step 6: Generating Reports

Administrators can create several different reports for tracking and documenting user activity. Created in pdf or csv format, reports are easily printed, saved or emailed.

To create a report:

1. From the Manage Users screen select your group from the Group drop box on the left side of the page
2. Select the test period(s) you would like the report to show from the Period drop box
3. Select the programs(s) you would like the report to show from the Program drop box
4. Select the user(s) you would like to create the report for
5. From the yellow Generate Report box, select what you would like the report to show you:
   - Assigned and complete – will show all assignments for each user, if they have completed a test you will see the completed date and score
   - Completed only – will only show tests that have been completed
   - Incompleted only – will show all tests that have not been completed
   - Full test history – will show all assigned and completed as well as any tests that have been reset
   - User Status – is a simple report showing all users, number of assigned, complete and average score
6. Select your report format: PDF or CSV
7. Click the Download button to generate your report

These are the basic 6 steps that you will use as an administrator. Below you will find some more general information and helpful hints.

Creating Custom Tests and uploading Custom Documents:

- Click on Manage Content at the top of your screen
- Click on your hospital's content tab
- Find the folder you would like to add your new content to and click + in the far right column
- From here you can choose to add a new folder, competency assessment or custom document. Name your new folder, competency or document and hit Save.

If you created a new competency assessment test:

- Click on the title. Click the Edit button if you would like to change the title, add a topic or change the testing period.
- Click the "Edit Questions" link to get started adding your questions
- For question 1, type in your question, answer choices and explanation (optional). Upload images if desired. Images must be in .jpg format.
- To add question number 2, and so on, click the Add button and continue adding your questions, explanations, answer choices and images.
- Once you are finished with your test hit Save. You can then preview the test.
- The final step is to mark your test Active; click the Edit button, mark your test Active and then hit the Save Changes button. Your test is now ready to assign.

If you created a new Document:

- Click on the title and click the Edit button.
- From here you can edit the title, end date, topic, author and version notes. Your users will not see the start or end dates, topic or author. They will see the title, version note and read receipt.

- In the lower left corner you will be able to add content. Click to Add Text, Add File, Add Video Link, Add Read Receipt and/or Add Test link and then follow the directions as above for creating a custom test.

Deleting and Restoring Deleted Users:
To delete one of more users from your account

1. From the Manage Users screen, click the box next to the user(s) you would like to delete
2. Click “Delete User” above your user list 

To restore a deleted user:

1. From your Manage Users page, about half way down the left side of the page click on "Only Deleted Users". This will generate a list of all users that have been deleted from your group.
2. Click on your user's name, highlighted in blue. This will pull up their user profile page
3. Click the blue Edit button in the lower left corner to open the user's profile to edit
4. Un-check the Deleted box towards the top
5. Click Save and they will be re-activated

Edit User: You can easily edit a user’s name, email address or password. To do so:

1. From the Manage Users screen click on a user’s name, highlighted in blue
2. The User’s Profile will appear on the left side of the screen, scroll down and hit the Edit button in the lower left corner
3. You can now update their name, email, department, group and/or password
4. Click on the Save Changes button

Edit Multiple Users: You can easily change Group, Location, Password, Competency Test Frequency, Auto Notification Frequency and Auto Notification Email for multiple users:

1. From Manage Users, select your Group and click the box next to your user(s)
2. Click “Edit Users” above your user list
3. Make any changes and click Save