Set up your organization: the admin quick-start checklist

Everything a new administrator does to go from sign-up to a trained team — in order, with links to the details.

For: Administrators · Updated November 23, 2026 · https://hipaacertify.com/index.php/support/article/admin-setup-checklist

New to HIPAA Certify? Follow these steps in order. Most organizations finish in under 30 minutes.

1. Create your account and verify your email

Sign up at **hipaacertify.com/register**, choose **Organization**, and click the link in the verification email within 24 hours. See Create your organization account.

2. Choose a plan

After you verify, HIPAA Certify takes you to **Billing**. Pick the plan that fits your number of employees and subscribe. You need an active plan before you can assign training. See Plans and employee limits.

> **TIP**
>
> U.S. universities and research institutions with a .edu or .gov email can use HIPAA Certify free. See Free program for universities.

3. Add your employees

Go to **Employees** and either click **Add Employee** for one person or upload a CSV file for many. See Add an employee and Import employees from a CSV file.

4. Send invitations

Adding someone does **not** email them. When you're ready, click **Send Invite** next to a person, or **Send All Invites** at the top of the Employees page. Employees can't sign in or see training until they're invited. See Invite employees.

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5. Assign training

Click **Assign Training** in the sidebar, pick employees and one or more courses, and optionally a due date. Invited employees get an email right away. See Assign training.

6. Share your organization's login link

Your dashboard shows **Your Organization Login URL** (it looks like `hipaacertify.com/org/your-organization/login`). Share it with staff and bookmark it — it's the most reliable way to sign in. See Find your organization's login URL.

7. Track progress and export proof

Your **Dashboard** shows who has completed, who is in progress and who is overdue. **Reports** has an audit-ready CSV. See Download the audit-ready training log.

Optional next steps

- Add a manager to help run training.
- Organize employees into departments.
- Take the training yourself before assigning it.

Need more help? Visit https://hipaacertify.com/index.php/support or contact us at https://hipaacertify.com/index.php/contact.

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