

Help Center / Getting started

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 October 27, 2026 · <https://hipaacertify.com/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](#).

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/support> or contact us at <https://hipaacertify.com/contact>.