Let managers and team leads see only their departments

As the account owner, limit a manager's reports to certain departments, or give a supervisor a read-only Team Report for their departments.

For: Administrators · Updated November 16, 2026 · https://hipaacertify.com/support/article/manager-team-lead-report-access

Only the **account owner** can change report access. Go to **Training Status** → **Manager & team lead access**.

> **NOTE**
>
> Access is given by department. If you don't have departments yet, create them under **Departments** and put employees in them first.

Limit a manager to certain departments

Managers are the other administrators on your account. By default they see every department.

1. Under **Managers**, click **Edit** next to the person.
2. Choose **Only these departments**, tick the departments, and click **Save**.

This changes only what they see in the Training Status report and in scheduled report emails. They can still manage employees and assign training as before.

Give a supervisor a Team Report

A team lead is an employee, such as a charge nurse or office manager, who can see training status for their departments but can't change anything.

1. Under **Team leads**, start typing their name or email in **Add a team lead** and pick them.
2. Tick their departments and click **Give team report access**.
3. Tell them that the next time they sign in, **Team Report** appears in their top menu, next to My Trainings and Certificates.

Team leads can:

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- see the Overdue, In progress, Not started and Completed lists for their departments, with charts
- export them to PDF, Excel and CSV
- send reminder emails to their team

To change their departments, click **Edit**. To take access away, click **Remove team lead access**. Removing access also stops any scheduled report emails to them.

Good to know

- You, the account owner, always see the whole organization.
- People with no department are visible only to administrators who see all departments.
- A deactivated or removed team lead loses access right away.

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