Email the training report to managers every week or month

Schedule the Training Status report as a PDF and Excel email to managers and team leads, each seeing only their own departments.

For: Administrators, Managers · Updated November 22, 2026 · https://hipaacertify.com/support/article/scheduled-report-emails

Send the Training Status report on a schedule, so managers get who's overdue and who's done without logging in.

Set up a scheduled email

1. Go to **Training Status** → **Scheduled emails** → **New scheduled email**. Or set the filters you want on the report and click **Email on a schedule**, which carries them over.
2. Choose **When**: every week on a day, or every month on a day from 1 to 28, plus the time and time zone.
3. Choose what to **Attach**: PDF executive summary, PDF full report and/or Excel workbook.
4. Under **Send to**, tick the people. You can pick administrators, managers and team leads.
5. Optionally limit it to certain departments or courses.
6. Click **Create scheduled email**. The confirmation shows the next send time.

> **IMPORTANT**
> Each person receives only the departments they're allowed to see. A team lead for Nursing gets Nursing only, even if the schedule includes every department.

Preview, pause, edit or delete

On **Scheduled emails**:

- **Send me a test** sends it to you now. Nobody else gets it.
- **Pause** / **Resume** stops and restarts sending.
- **Edit** changes the schedule or recipients.
- **Delete** removes the scheduled email.

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Good to know

- To include a supervisor who isn't an administrator, the account owner first makes them a team lead. See Manager and team lead report access.
- Each email shows the key numbers and the 10 most overdue people, links to the live report, and attaches the files.
- If the files would make the email too large (over about 9 MB), the biggest file is left out and the email says to download it from the live report.
- Every recipient can click **Stop sending me this report** in the email. They show as **Unsubscribed** on the schedule. Only add them back if they ask.
- People who are removed, deactivated, or lose report access stop receiving it automatically.
- Scheduled emails are only sent while your subscription is active.
- You can have up to 20 scheduled emails, each with up to 50 recipients.

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

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