

The one-afternoon rollout, at a glance

SAMPLE · FICTIONAL COMPANY

Meridian Dental Group — Sample Company · Run by Dana Reyes, Office Manager, October 5–16, 2026 (illustrative). This overview condenses the full step-by-step guide in the pack: three steps for the admin, about 35 minutes total per employee, no logins to manage, no software to install.

STEP 1 · ~10 MIN

Adopt the policy

Put the company name on the training policy template, have the owner sign it, circulate it to staff. The questionnaire sentence about a training program is now true in writing.

STEP 2 · ~35 MIN / EMPLOYEE

Run the videos

Send the module links. Each is 3–5 minutes with a short quiz; people finish between patients. Spread it over any schedule — the log tracks who's done.

STEP 3 · ~30 MIN

File the evidence

Fill the completion log, generate the completion records, file everything behind the register. At renewal, attach — don't scramble.

THE ADMIN CHECKLIST — AS COMPLETED IN THIS SAMPLE

☒ Adopt & sign the policy — owner signature, date, circulate to all staff	OCT 5 · 10 MIN
☒ Announce the rollout — one email to the team: what, why, and the two-week window	OCT 5 · 5 MIN
☒ Send module links — everyone gets the same links; no accounts, no seats to provision	OCT 6 · 10 MIN
☒ Track completions weekly — tick the log as quiz confirmations arrive; nudge stragglers once	OCT 6–16 · 5 MIN/WK
☒ Generate completion records — one dated record per employee per finished module	OCT 16 · 10 MIN
☒ File the register — policy, log, records behind the one-page register; folder named and dated	OCT 16 · 5 MIN
☐ Before next renewal — re-issue the register, close any gaps, hand the single page to the broker	ANNUAL

What this illustrates. Dates show a fictional company's rollout after the pack's September 16, 2026 delivery. The full step-by-step guide (EV-05) ships with the pack; this page is the at-a-glance version an office manager actually pins up.