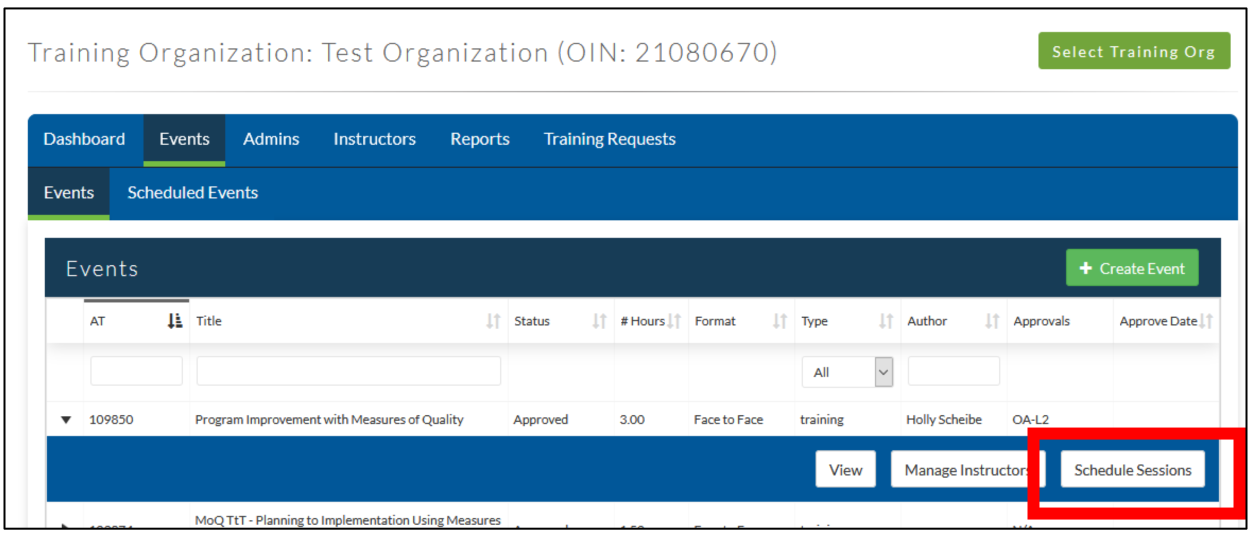
Scheduling and Managing Professional Development Events

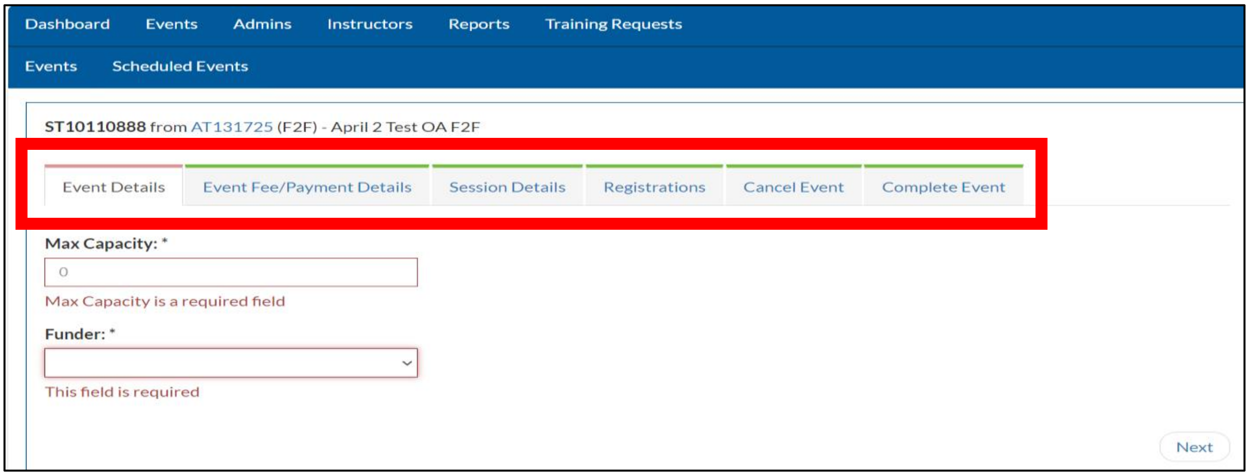
Note: Only PD Events that have completed the application review process can be scheduled in the OPR.

Schedule a new PD Event

1. Select Organizations from the menu on the left, then choose Training Org. Dashboard, select the dashboard, and choose Events.
2. Locate the intended event, click the arrow on the far left of the table to access the additional action buttons.

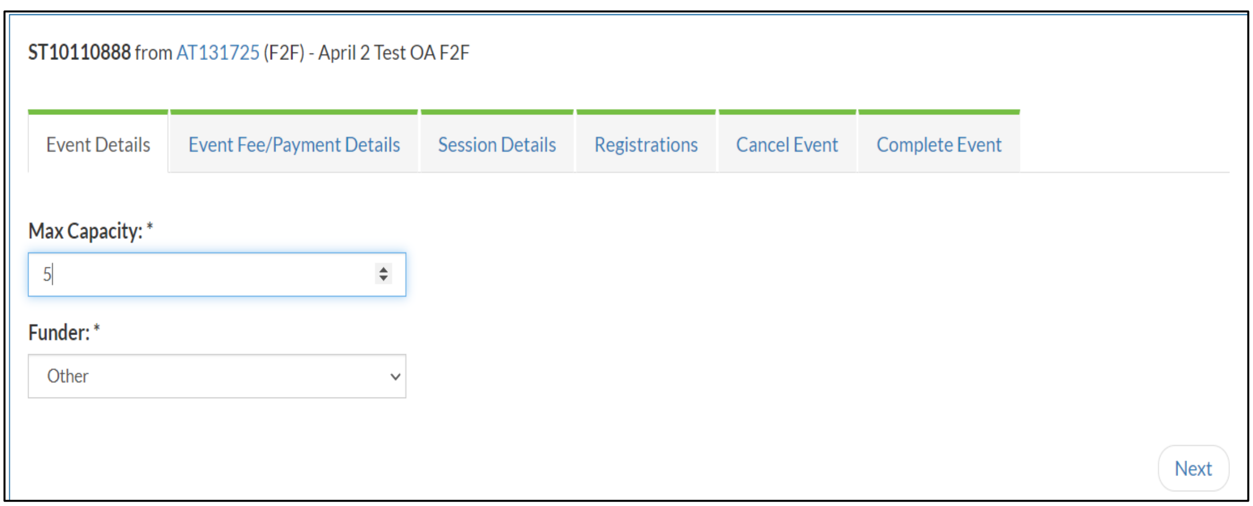


Click the Schedule Sessions button. A unique 8-digit ID number called the ST (Scheduled Training) will be assigned to the event. Record this number for reference, and to access and manage the PD Event. Each time you schedule a new PD event, follow this process to generate a new ST number. ST numbers cannot be reused, and multiple events cannot be scheduled under the same ST number.



Under each tab is the required information for the PD Event. Click on the tab of each step to open.
<u>Event Details</u> – Fields with an asterisk are required.

- The Maximum Capacity is the maximum number of participants that may register for this event.
- The funders field is for those events sponsored by a specific initiative. Choose the "Other" option if this does not apply to your event.
- Click Next to move forward.

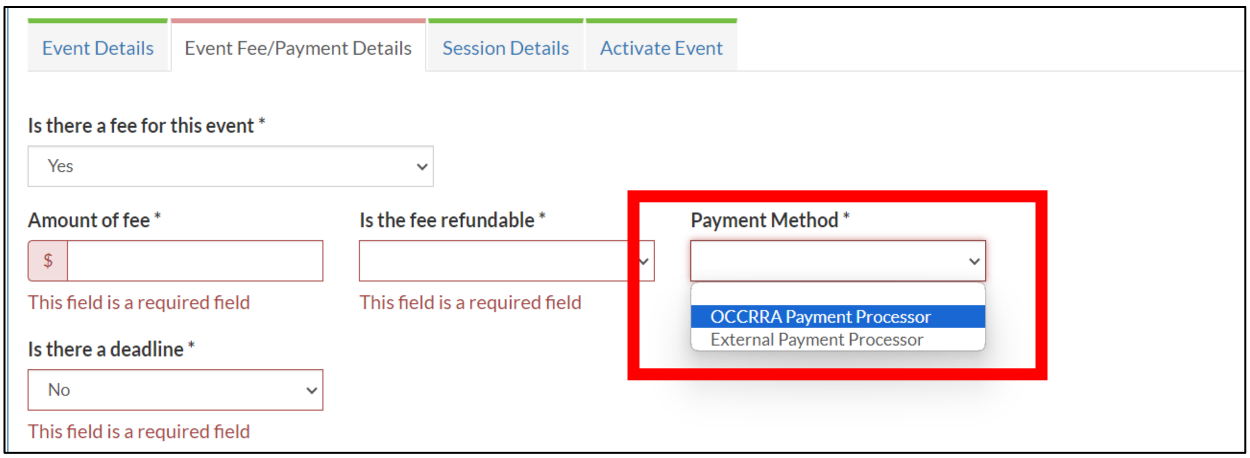


Event Fee/Payment Details – Complete the required fields if the event is fee-based; otherwise, select "NO" and click the Next button.

Two payment methods are available here:

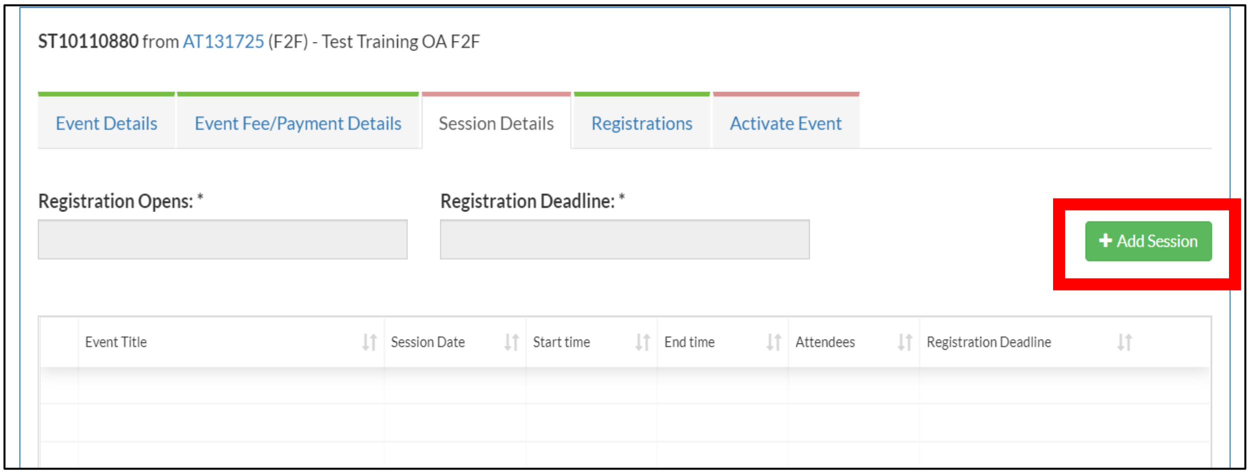
- OCCRRA Payment Processor – Participant fees come to OCCRRA and payment is forwarded to the training organization, minus processing fees. The Training Organization must register with OCCRRA for this system.
- External payment Processor – participant fees go to the training organization (or sponsor of) through an external website or other service. A valid URL (web link) must be entered to use this option.

Click Save before moving forward.

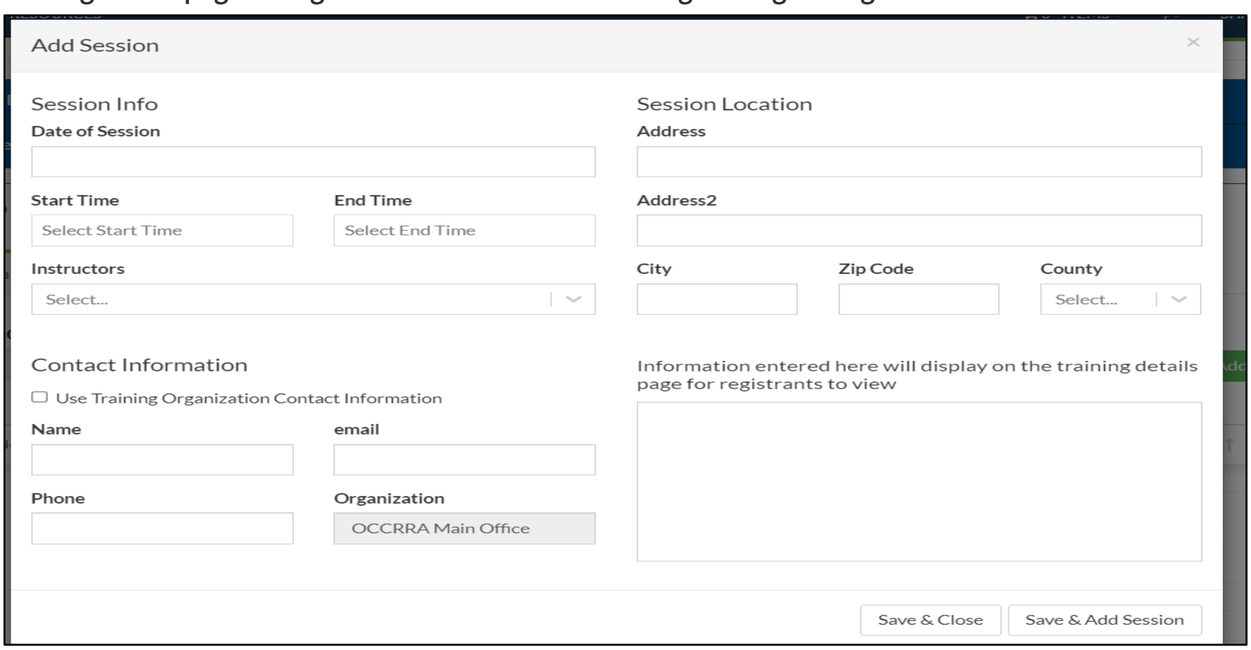


Session Details – Click the green Add Session button to access the required fields.

- If the event has multiple parts, each part is an individual session *within the ST*. For example, if an event is to be presented in 3 parts, then it will have 3 sessions under the same ST. If an event is only 2 hours long, then only one 2-hour session per ST should be scheduled. To add an additional session, click the green Add Session button again.
- The Registrations Opens and Registration Deadline fields will activate one a session has been added.

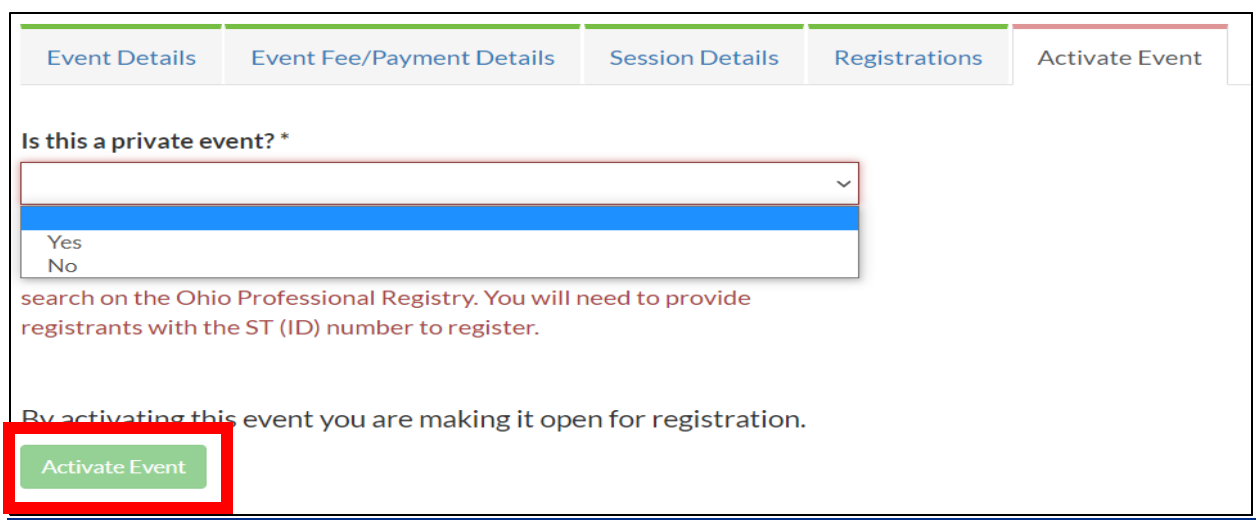


When the Add Session modal displays, complete each field. **Information entered here will display on the training details page for registrants to view when searching and registering for courses on the OPR.**



- Date of Session – Actual date of the event.
    - If the event is Asynchronous and will be accessible for an extended period, the Session Info display will be an “Available on” date and an “Available Through” date (the date listed here should be the last date the event will be available). For example, an event first posted in January 1 that is to be available until May 30th, the Available On Date is 1/1/2021 and the Available Through date will be 5/30/2021.
- Start Time/End Time – These times should reflect the total number of hours the event. Use the time modal to select times. For example, if the event is for 2 hours, the start/end times should reflect 2 hours. Time designated for breaks may be included in this time, however participants will receive credit only for the time frame of the approved event AT.
- Instructors – Only Ohio Approved instructors who have been added to the AT will be listed.
- Contact Information – Include the name of the person who should be contacted regarding this event or check the box next to “Use Training Organization Contact Information” to auto-populate the Training Organizations information for professionals.
- Session Location – enter the location of the event. If the event is asynchronous, the location field is not required.
- Notes box – Enter information for participants, such as parking directions, room location, or website login information. If the event is asynchronous online, provide instructions on how to access the online even, such as the URL for the online course.
- Click Save Session when finished.
- Registrations – a list of professionals who are registered will display here after activation.
- Active Event - Set the event as “Private” or “Public” and activate the training, which opens it for participant registration. Private indicates the event is scheduled for a specific group of participants who must use the ST# to register. Public indicates that the event is open to all users who have a profile in the OPR.

Once the event is activated, professionals can search for and register for this event in the OPR Professional Development Search via their profile.

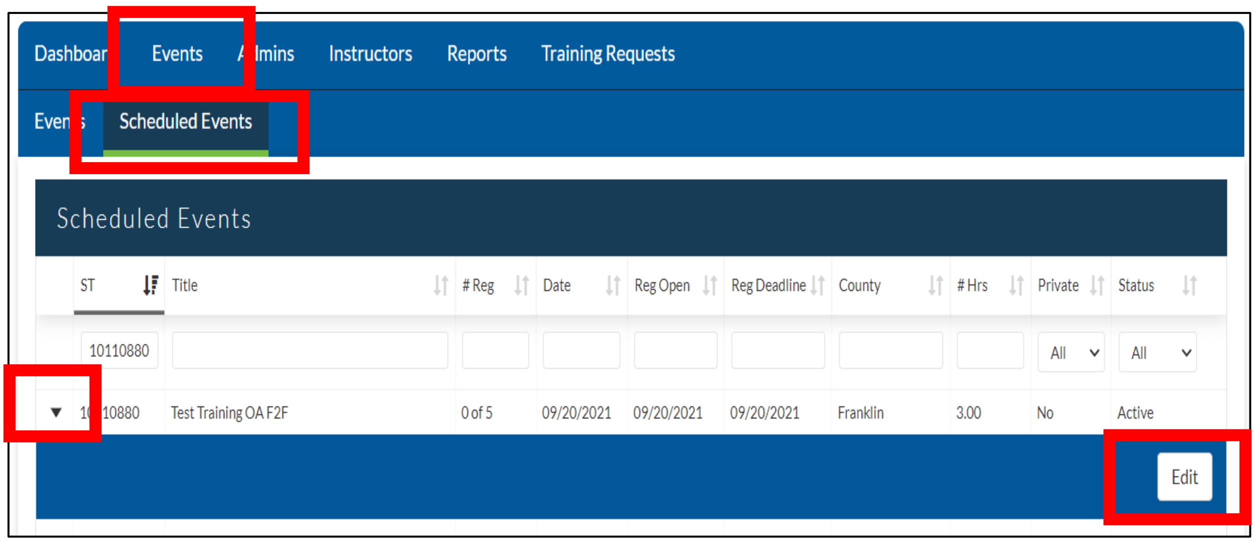


Locating a Scheduled Event (ST)

Go to the Events tab and click on the Scheduled Events tab to view all scheduled events.

Locate the ST via the filters at the top of each column or click on each column header to sort that field.

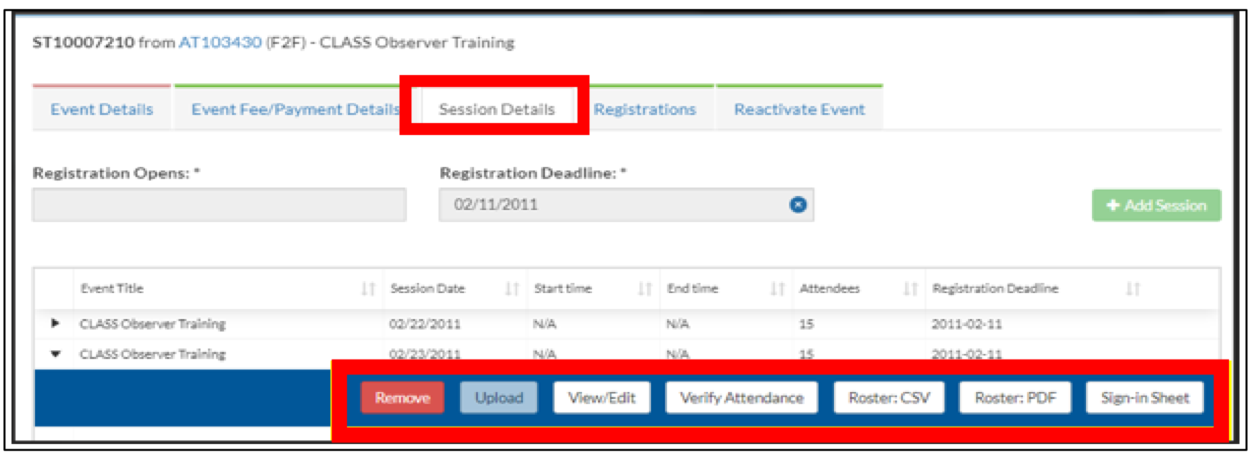
To view available actions for an event, click the arrow on the far left of the table; a new field will open with an Edit button. Click edit to view the ST.



Manage PD Event– view registrants, add registrants

Go to the Training Organization Dashboard and choose Events; choose Scheduled Events.

- Filter the Scheduled Events by Event ST Number, Title, Status, etc.
- Locate the ST and click the arrow on the far left of the table to access the Edit button and view the ST.
- Go to the Registrations Tab to view professionals who have registered. You may manually add registrants via their OPIN number as well.
- Go to Session Details:
- Click the arrow on the far left of the table to access the additional action buttons and choose an action:
- Remove – deletes the session including the registration and the attendance
- Upload – upload a CSV file for large attendance rosters and special events (conferences, etc.); this will add registrants to the session. Upload a csv file for each session of the scheduled event.
- View/Edit – view the Session Details and add information for participants if needed
- Verify Attendance – mark attendance for registrants
- Roster CSV– export a csv file of all registrants and contact information populated from their profile
- Roster PDF – pdf of roster with registrant name and contact information populated from their profile
- Sign In Sheet – to be used to record attendance at an event and view registrant contact information

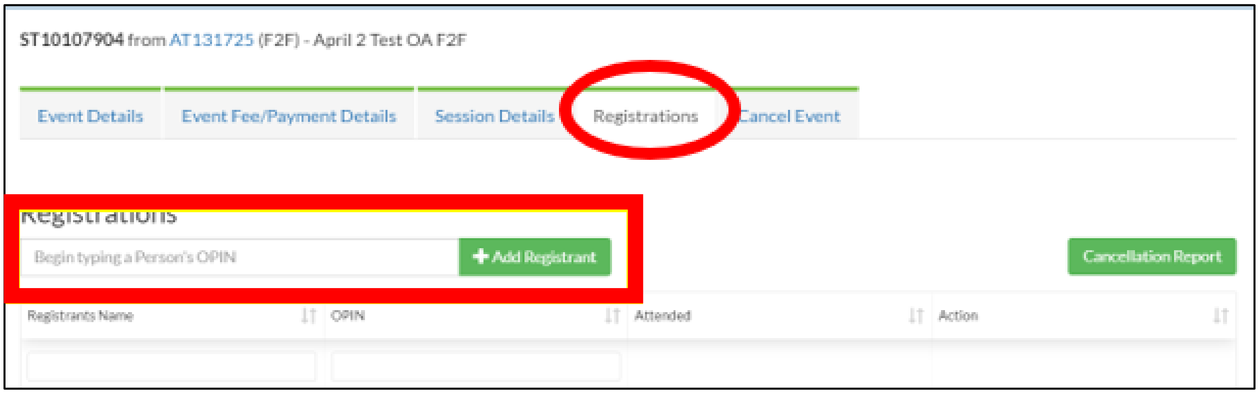


Manually Add Registrants

Access the scheduled event via steps listed under Manage PD Event and type in the registrant's OPIN in the box.

- Click on the name that lists in the drop-down

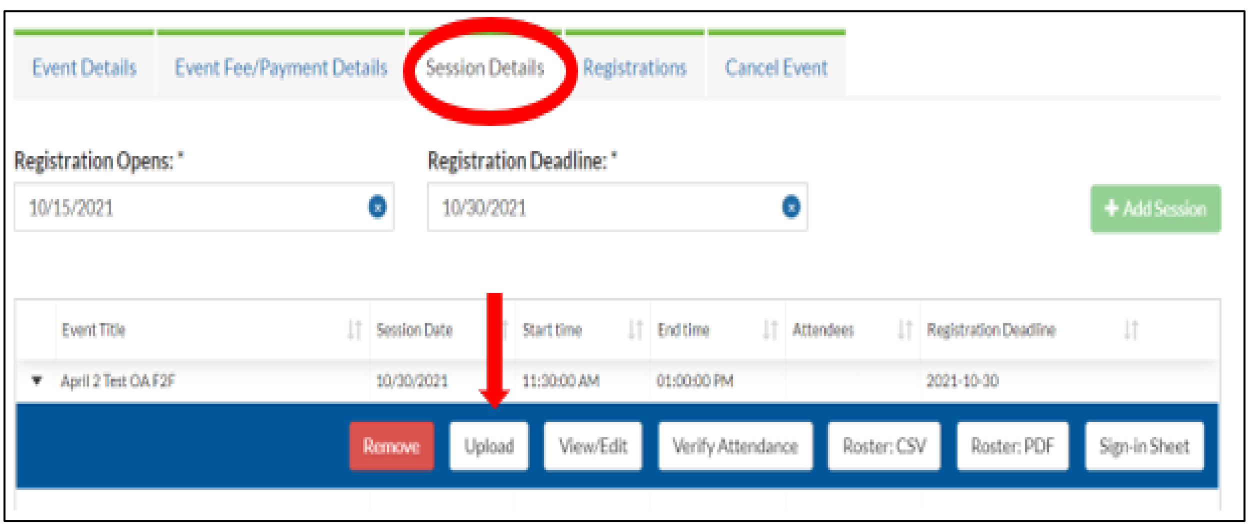
- Click on “Add Registrants:



To add registrants via CSV upload:

Access the scheduled event via steps listed under Manage PD Event and go to Session Details.

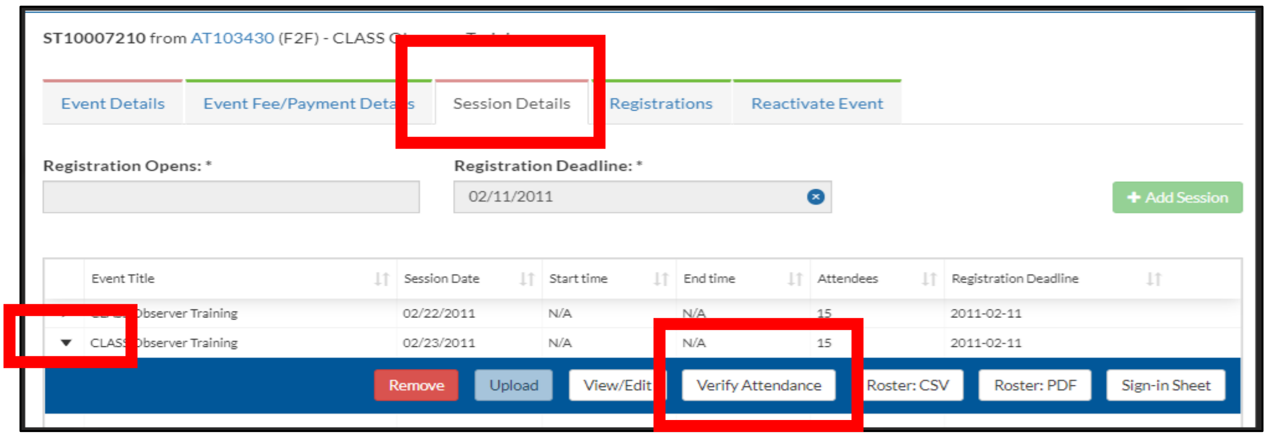
- Click the arrow on the far left of the table to access the additional action buttons and choose “Upload”.
- Upload a CSV file for large attendance rosters and special events (conferences, etc.); this will add registrants to the session. Upload a csv file for each session of the scheduled event.

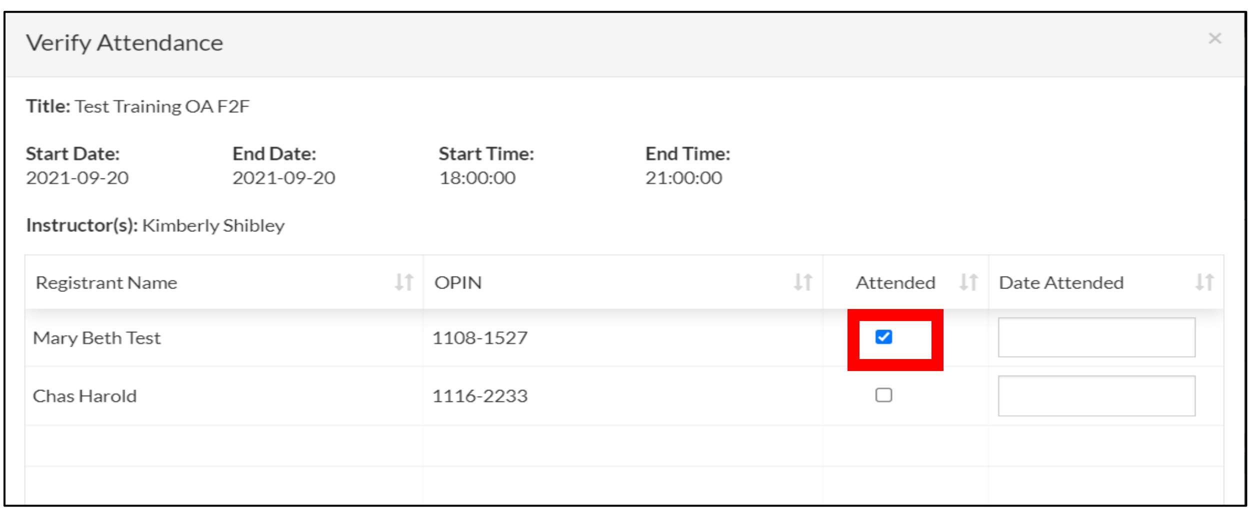


Verify Attendance

Go to the Training Organization Dashboard and choose Events; choose Scheduled Events.

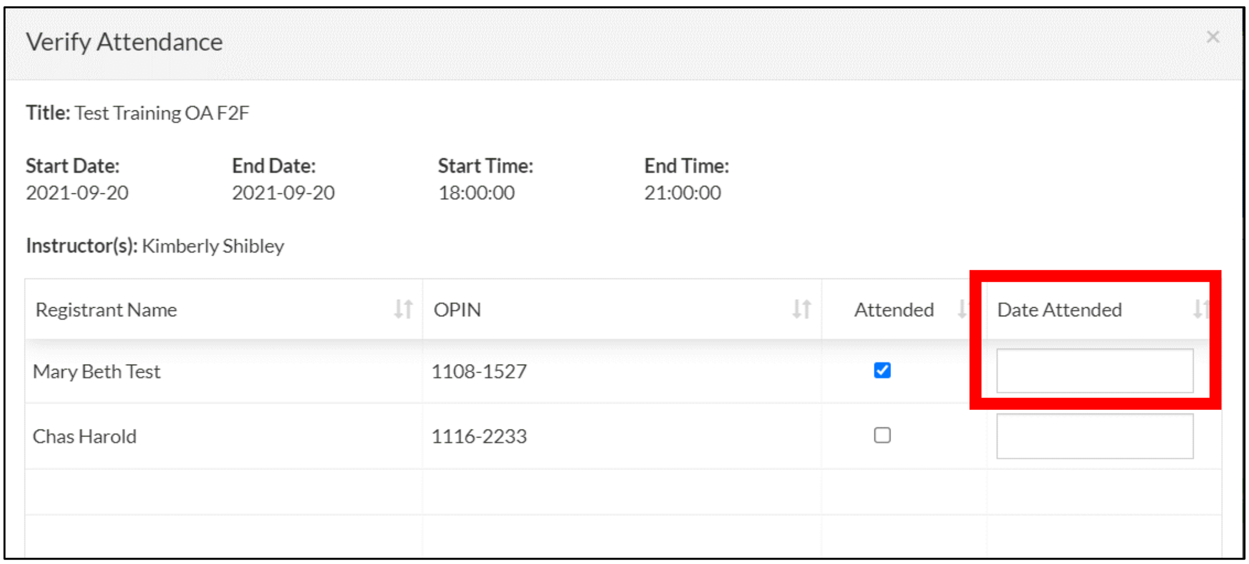
- Locate the ST and click on the arrow on the far left of the table to access the Edit button and view the ST.
- Click on the Session Details tab.
- Click the arrow on the far left of the table to access the additional action buttons and choose Verify Attendance.
- Click on the box under the Attended column for each registrant that successfully completed the course. This will send the data to the registrant's profile.





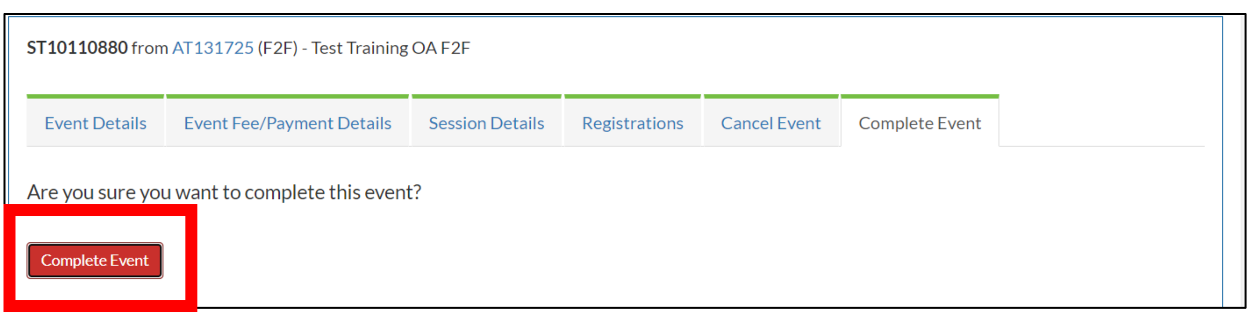
For Asynchronous PD events only:
The date the training organization verifies attendance for an asynchronous training becomes the date of completion in the professional's profile. If the date of completion is *not* the same as the date of verification, the date can be changed. The date of attendance may be edited to indicate the exact date of the training completion.

To access the PD event, complete the steps for Verify Attendance on page 14.
In the Date Attended column, click in the box next to the checkbox for each professional and type in the actual date of completion.



Complete PD event – This process closes the PD Event and no further edits may be done.
Once attendance has been verified:

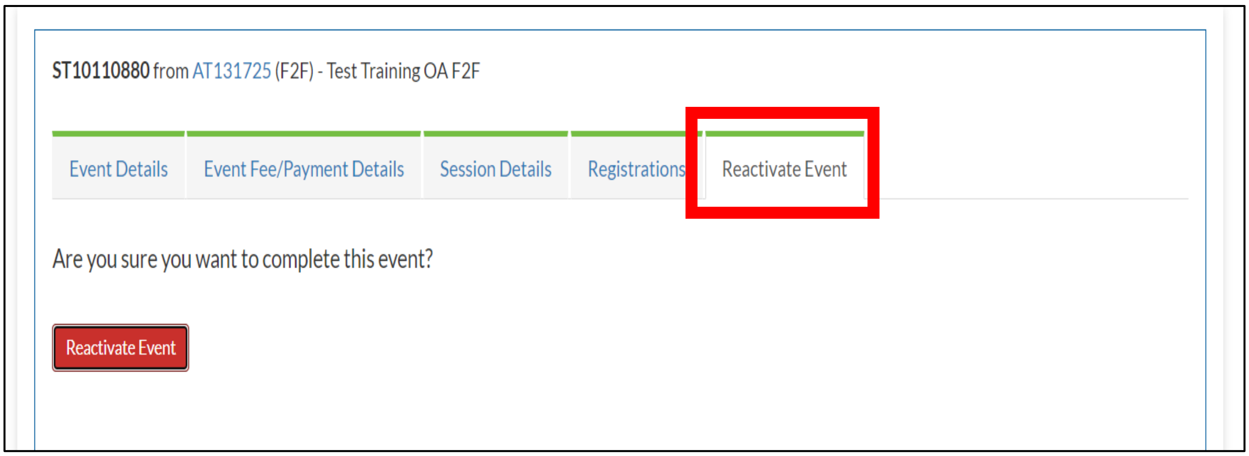
- Click on the Complete Event tab
- Select "Complete Event" and Select "Yes"

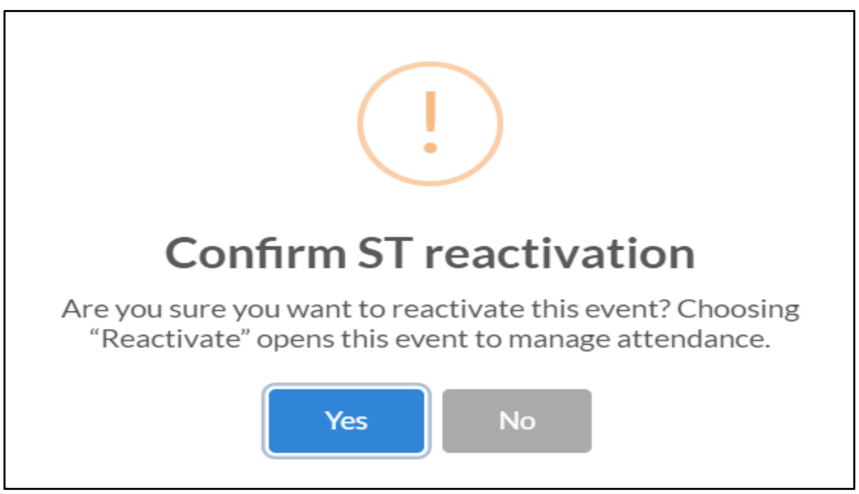


A completed event may be reactivated to revise attendance if necessary.

Reactivate Event – This process opens the PD Events to allow for revisions to the attendance.

1. Go to the Training Organization Dashboard and choose Events; choose Scheduled Events.
2. Locate the ST and click on the arrow on the far left of the table to access the Edit button and view the ST.
3. Choose Edit
4. Click on the Reactivate Event tab
5. Click on the Reactivate Event button
6. Choose “YES”
7. Revise/verify attendance as directed on page 14.





For additional questions or concerns, please contact us at support@occrra.org.