

# Training Organization Dashboard User Guide



Ohio Child Care  
Resource & Referral  
Association

The **Training Organization Dashboard** is the portal through which PD Event applications, for both OA and Non-OA, are created and submitted for review by the OCCRA Approval Review Team. Other functions of the training organization dashboard include:

- Scheduling Professional Development (PD) Events for posting on the Ohio Professional Registry (OPR)
- Managing PD event registrations and attendance
- Managing instructors

If you **are not already** associated with a training organization, you must apply to be a Training Organization to create, submit, and post PD events.

For more detailed information on the requirements within this document, please see [OCCRA's Instructor and PD Event Application Policy and Procedure Manual](#), Section 3.0 Training Organization Dashboard Responsibilities.

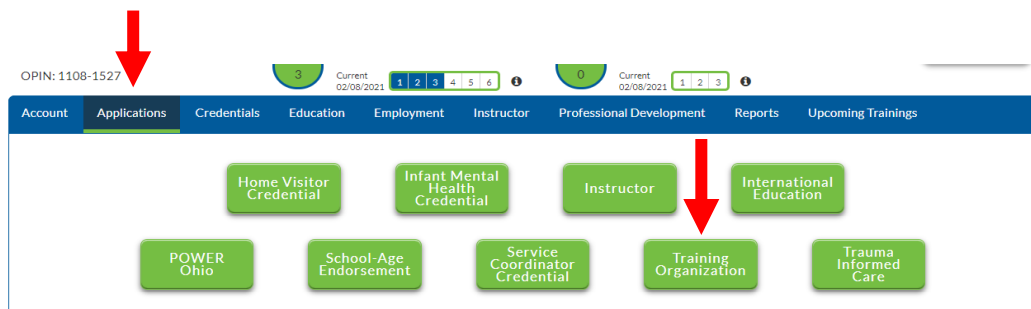
**\*\*Please be advised that the supported web browsers to use for all training organization dashboard functions are Google Chrome or Mozilla Firefox. Use of other browsers may result in unsuccessful functionality. \*\***

## Apply to be a Training Organization

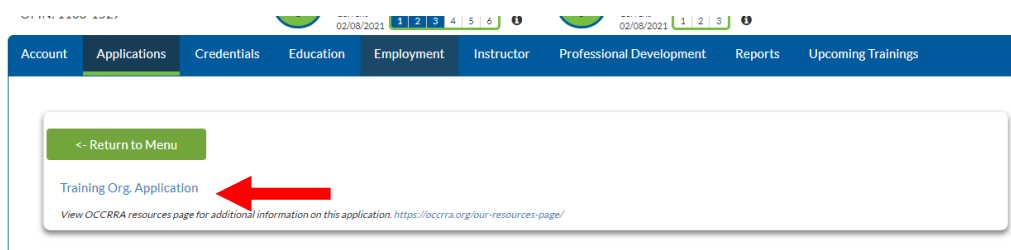
1. Visit [www.occra.org](http://www.occra.org) to sign-in to your profile.



- Select **Applications** from the blue menu bar.
- Select **Training Organization**.



- Select **Training Org. Application**



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Within the **Applicant** drop down, choose Create New Organization.

- Complete fields: All fields marked with an asterisk (\*) are required.
2. Click Next Step. You will be automatically directed to the Training Organization Dashboard. **Note: The person that completes the application is designated as the Training Organization Administrator. Changes to the assigned administrator(s) can be made once the application has been accepted.**

If you **are already associated** with a training organization, the administrator of that dashboard will need to grant you access/permissions for that dashboard. Please see instructions for that process in the following section.

TRAINING ORGANIZATION APPLICATION

User Guide

Training Organization Information

**Applicant**

Select an Option

Organization Name \* Email Website

Address \* Address 2

City \* State \* Zip \* County \*

Primary Phone \* Secondary Phone Fax

Next Step

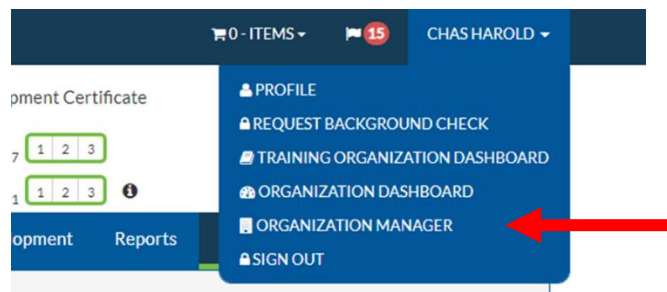
2

## Training Organization Dashboard – Granting Access

Once approved as a training organization, the organization administrator must grant permissions for other staff/users to have access to the Training Organization Dashboard.

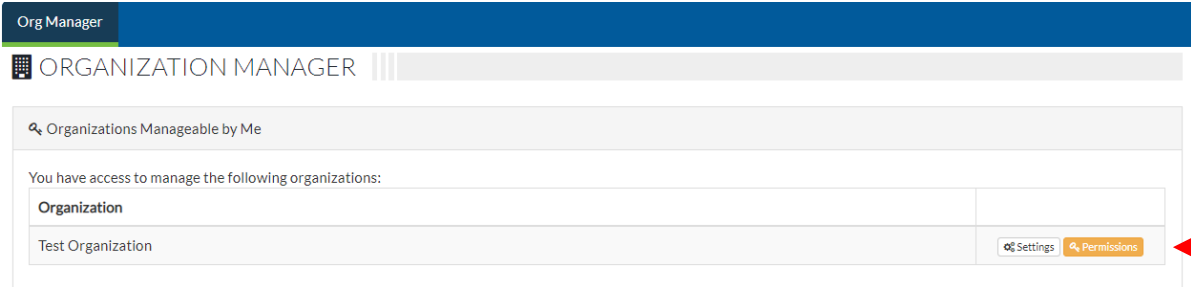
### To grant access:

1. Log in to your Ohio Professional Registry profile
  1. From the drop-down menu next to your name choose Organization Manager



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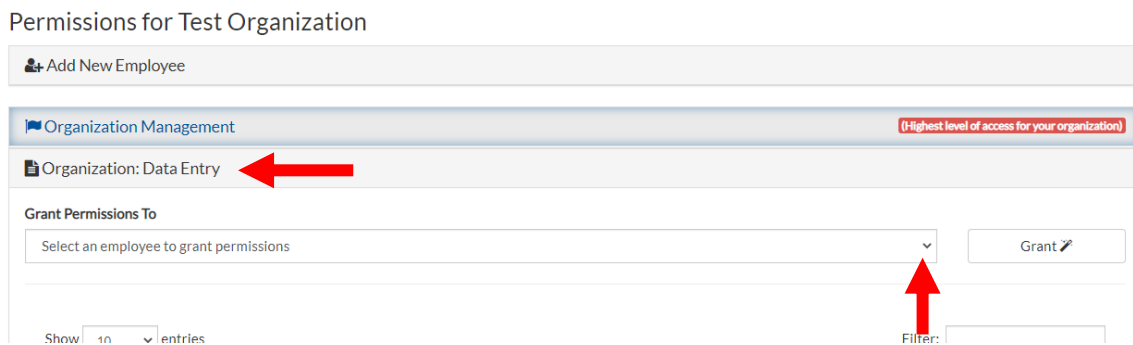
- 2. Select the training organization you want to manage from the Organization list and click Permissions. All training organizations that are affiliated with your OPIN will be listed.



- 3. Select Add New Employee (a new field will open). Type in the employee's OPIN and click the green Add Employee button.



- 4. Select Organization: Data Entry (a new field will open) and choose the person from the drop down that you wish to grant dashboard access. Click Grant. With Data Entry permissions, users can create and submit training applications, and schedule/manage training events.



To grant access to additional users as Training Organization Administrators, follow the process in **Step 4**, choosing the Organization Management field. Users can also be granted permission to generate reports using the Organization: Reports field.

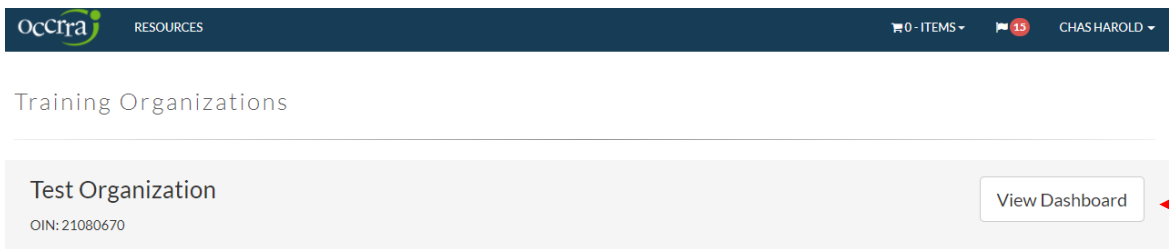
# Training Organization Dashboard User Guide

## Using the Training Organization Dashboard

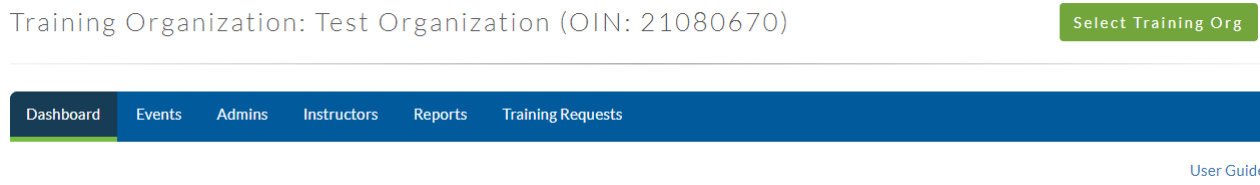
1. Visit [www.occrra.org](http://www.occrra.org) to sign into your profile. Select Training Organization Dashboard from the drop-down menu below your name in the top navigation bar. (Step 1 in the previous section)

**NOTE: This function is only enabled if you are a training organization or have been granted access to a training organization dashboard. You only have access to organizations associated with your OPIN.**

2. Select the organization you want to manage and choose View Dashboard. The OIN number displayed is the unique identifier for each training organization.

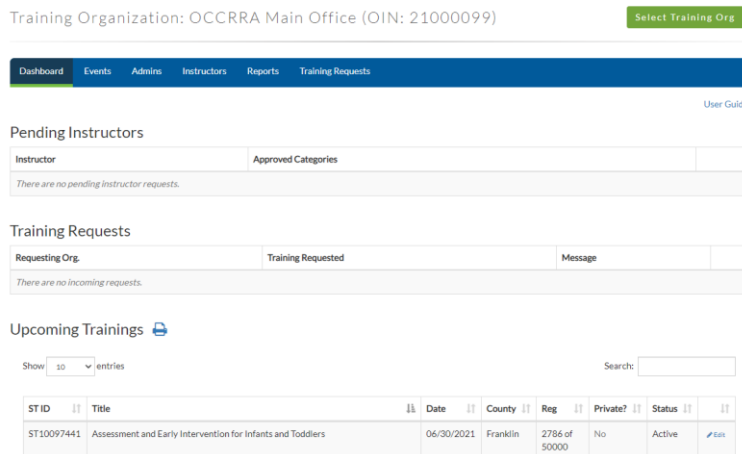


3. On this page you can perform several actions, using the buttons across the top of the page. There is also a link to this user guide from this page. To change organizations, click the Select Training Org button.



## Dashboard

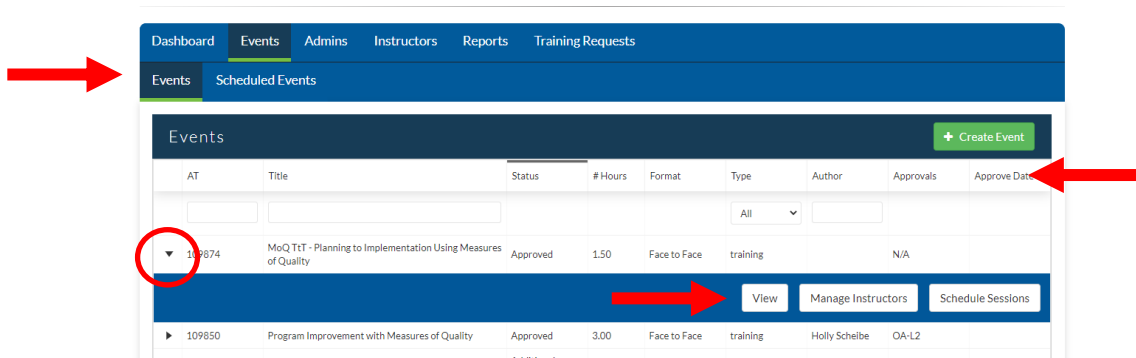
On this page you can see instructors who have requested to be associated with your training organization, requests from other training organizations to share AT's, and any upcoming scheduled PD events.



# Training Organization Dashboard User Guide

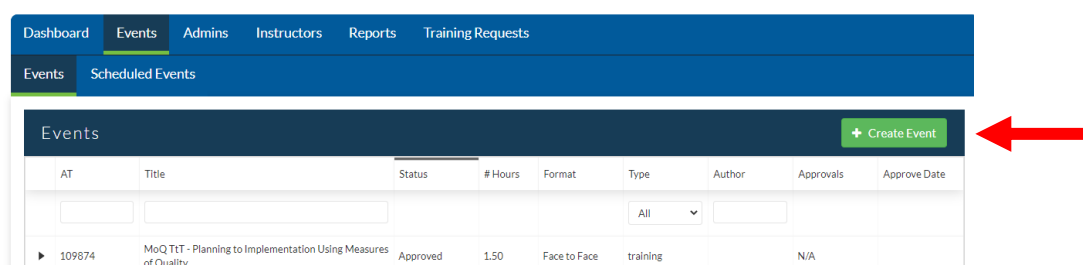
## Events

1. On the Events page view all PD events associated with the training organization, create a new PD Event application, and manage scheduled PD events. Click the **Events** tab on the second blue bar to view all associated events.
2. To view available actions for an event, click the arrow on the far left of the table; a new field will open with additional action buttons. To close the option, click the arrow again. Click on each column header to sort that field.



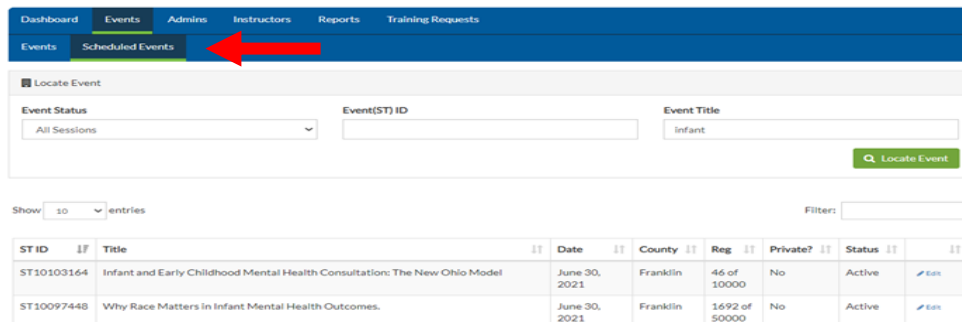
- a. View allows you to see information associated with the event application.
- b. Manage Instructors allows you to add instructors who are eligible to present this event. Add instructors using their OPIN to avoid adding the incorrect person, or person with same or similar name.
- c. Schedule Session opens a new page to schedule an event. (more information on how to schedule an event, see Page 9 of this guide)

3. To create and submit a new PD Event application, click on the green Create Event button. A new application will open. For more information on competing the PD Event application, see the PD Event Application User Guide, which can be found on the Resource page of the OCCRA website.



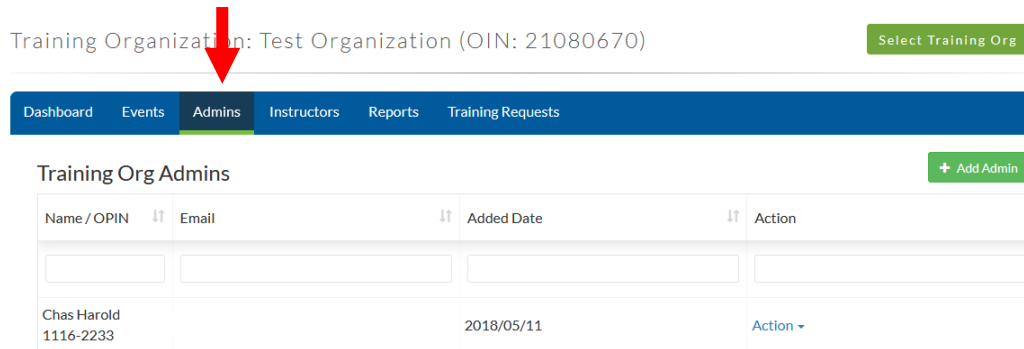
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4. Click the **Scheduled Events** tab to view all events scheduled by the training organization. Search scheduled events by Event Status, Event ST (ID), or Event Title. All events can be displayed by clicking the green Locate Event button.



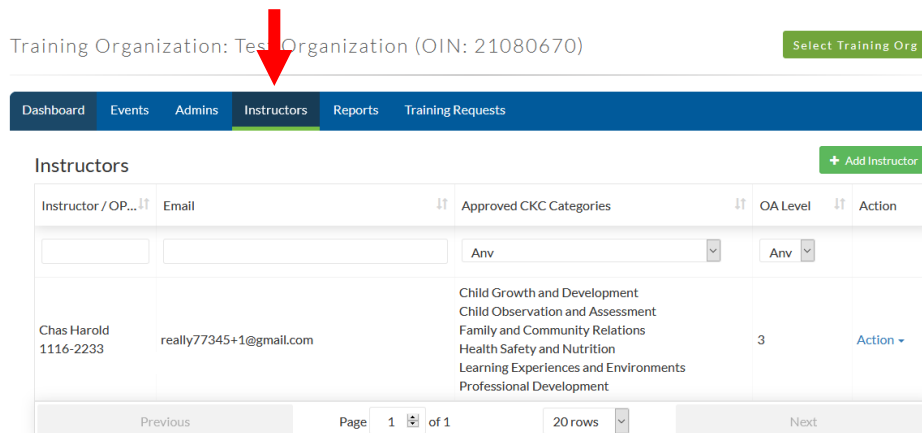
## Admins

On the Admins page you can view all administrators for the training organization. Administrators can be added or removed from this page. Click the green Add Admin button to add; click the Action button to remove.



## Instructors

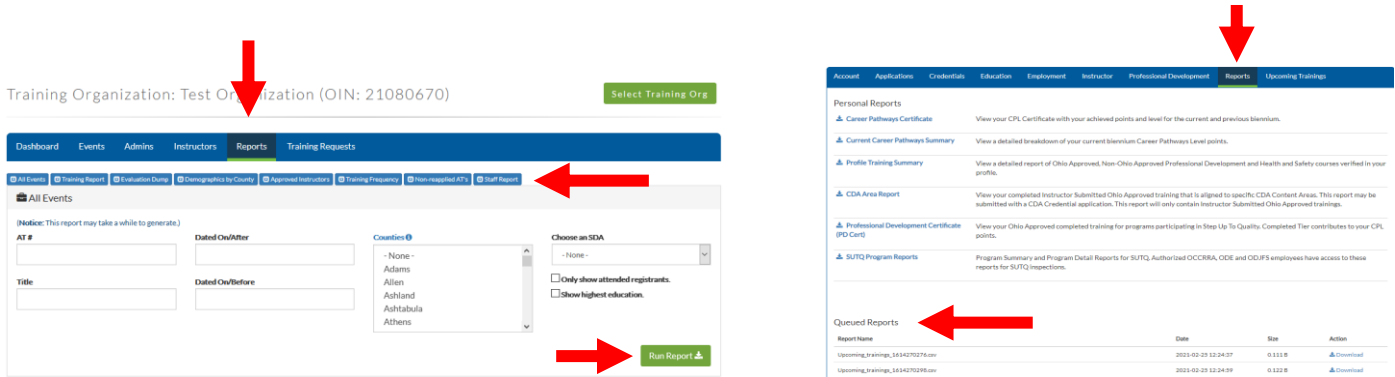
On the Instructors page you can view, add, and remove the Ohio Approved instructors associated with your training organization. This function does not grant instructors access to the Training Organization Dashboard or give them permission to instruct/facilitate specific PD events – it is for display only. Click the green Add Admin button to add; click the Action button to remove.



# Training Organization Dashboard User Guide

## Reports

On the Reports page you can generate reports for the selected training organization. Choose the type of report from the blue tabs, enter the required information, and click the green **Run Report** button. When the report is complete, a notification will be sent to your profile, and the report will be available in the Reports area of your OPR profile.



Training Organization: Test Organization (OIN: 21080670) Select Training Org

Dashboard Events Admins Instructors **Reports** Training Requests

All Events Training Report Evaluation Data Demographics by County Approved Instructors Training Frequency Non-eligible 47% Staff Report

(Notice: This report may take a while to generate.)

AT #  Dated On/After  Counties  Choose an SDA

Title  Dated On/Before   Only show attended registrants.  Show highest education.

**Run Report**

Account Applications Credentials Education Employment Instructor Professional Development **Reports** Upcoming Trainings

Personal Reports

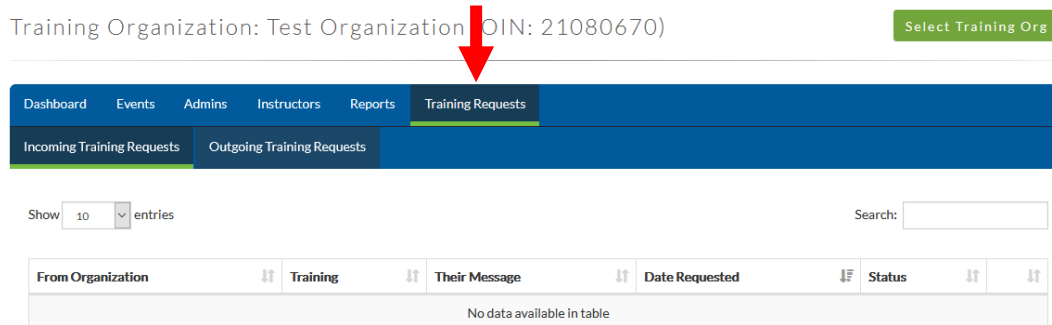
- ▲ Career Pathways Certificate View your CPL Certificate with your achieved points and level for the current and previous biennium.
- ▲ Current Career Pathways Summary View a detailed breakdown of your current biennium Career Pathways Level points.
- ▲ Profile Training Summary View a detailed report of Ohio Approved, Non-Ohio Approved Professional Development and Health and Safety courses verified in your profile.
- ▲ CDA Area Report View your completed Instructor Submitted Ohio Approved training that is aligned to specific CDA Content Areas. This report may be submitted with a CDA Credential application. This report will only contain Instructor Submitted Ohio Approved trainings.
- ▲ Professional Development Certificate (PD Cert) View your Ohio Approved completed training for programs participating in Step Up To Quality. Completed Tier contributes to your CPL points.
- ▲ SUTQ Program Reports Program Summary and Program Detail Reports for SUTQ Authorized OCCRA, ODE and ODJFS employees have access to these reports for SUTQ inspections.

Queued Reports

Report Name	Date	Size	Action
Upcoming_Trainings_1414270274.csv	2023-02-21 12:24:37	0.111 K	Download
Upcoming_Trainings_1414270298.csv	2023-02-21 12:24:39	0.122 K	Download

## Training Requests

On the Training Requests page, you can manage **Incoming PD Event Requests** from other training organizations. This function grants users' access to schedule and manage PD events for the requested event. All requests will appear in the table. You can also request access to PD events from other organizations from **Outgoing PD Event Requests**. This allows your training organization to schedule and manage PD events for the requested PD. **Note:** There should always be a discussion between the training organizations prior to requests being made.



Training Organization: Test Organization (OIN: 21080670) Select Training Org

Dashboard Events Admins Instructors Reports **Training Requests**

Incoming Training Requests Outgoing Training Requests

Show 10 entries Search:

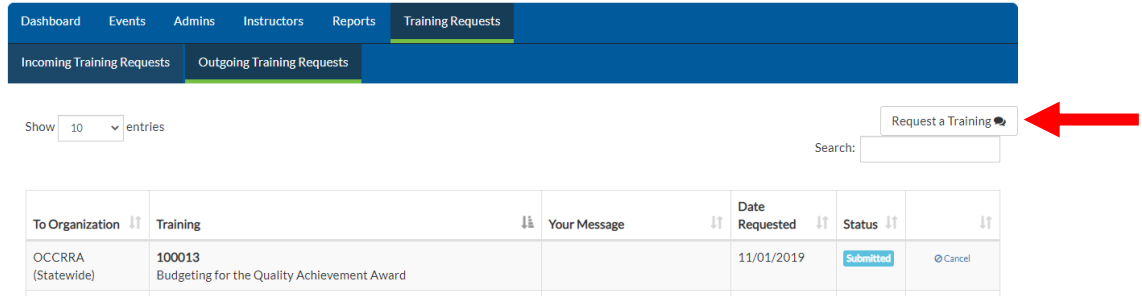
From Organization	Training	Their Message	Date Requested	Status
No data available in table				

### To request a PD Event:

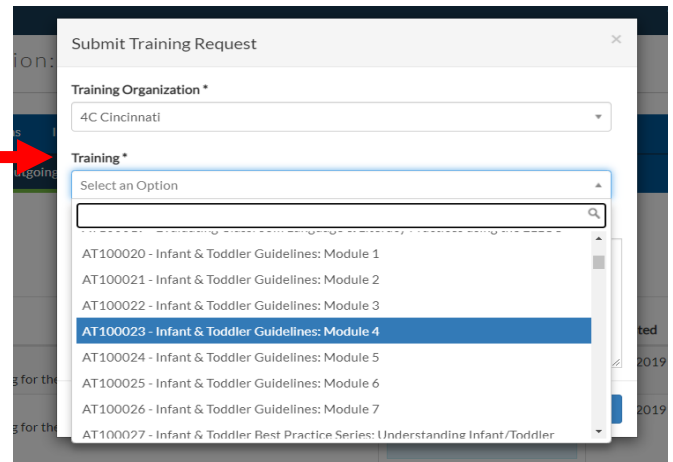
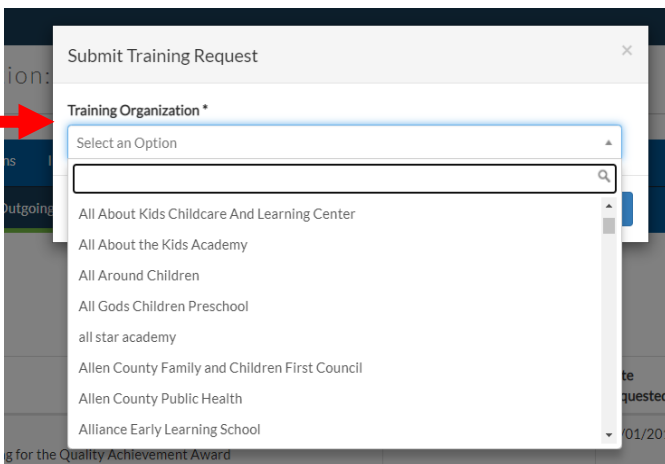
1. Visit [www.occrra.org](http://www.occrra.org) to sign into your profile.
2. Select Training Organization Dashboard from the drop-down menu below your name in the top navigation bar. Choose the training org you want to manage and click View Dashboard.
3. Click the **Training Requests** tab, then choose **Outgoing Training Requests**.

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4. Click the Request a Training Button, and a list of training organizations will appear.



5. Choose the training organization that owns the PD event you are requesting access to. Then choose the event from the next dropdown. There is a field to include a message to the training org; it is not required. Click Submit.



Once the training organization that owns the PD event receives the request in their dashboard, the training organization designee can then approve or deny the request.



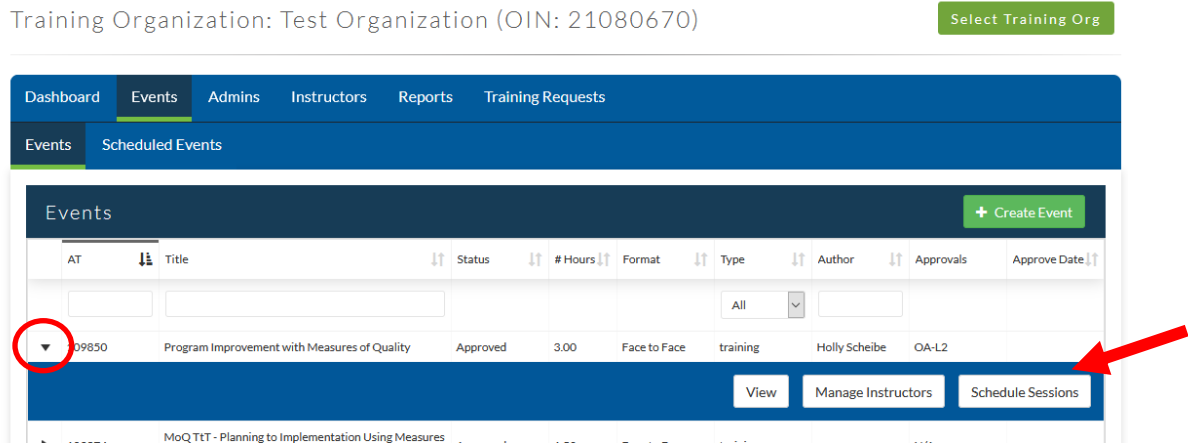
## Scheduling and Managing Professional Development Events

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

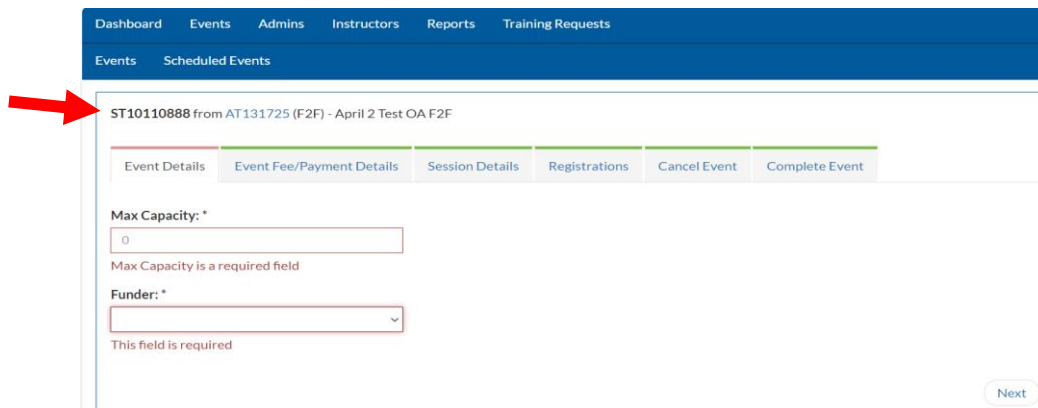
### To schedule a new PD Event:

1. Log in to your profile.
2. Go to the **Training Organization Dashboard** and choose **Events**.
3. Locate the intended event, click the arrow on the far left of the table to access the additional action buttons.

For more information on these steps, see the Events section of this document, Page 5.



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.

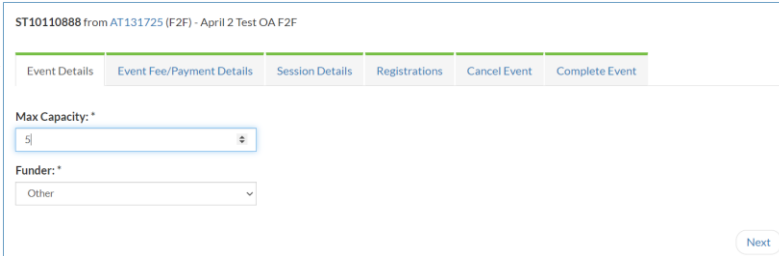


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Under each tab is the required information for the PD Event. Click on the tab of each step to open.

### Event Details – 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.



ST10110888 from AT131725 (F2F) - April 2 Test OA F2F

Event Details | Event Fee/Payment Details | Session Details | Registrations | Cancel Event | Complete Event

Max Capacity: \*  
5

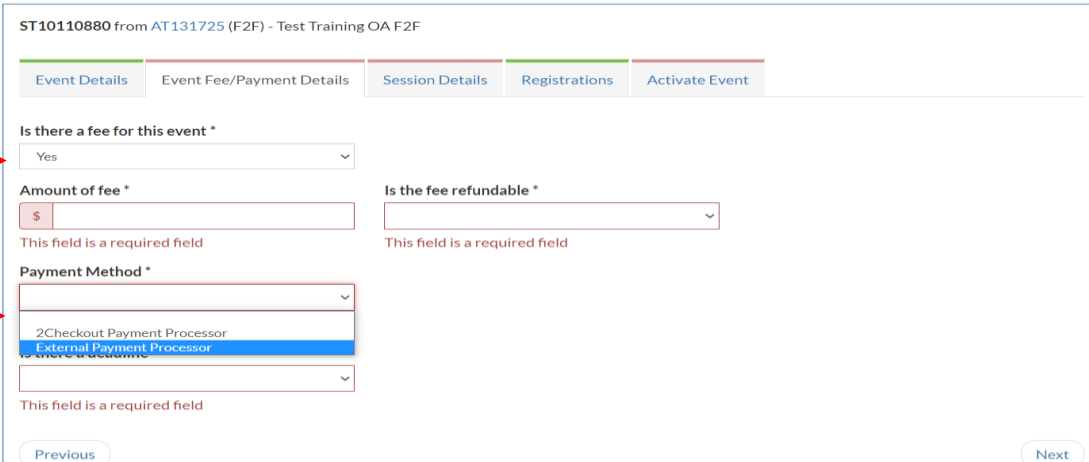
Funder: \*  
Other

Next

A red arrow points to the 'Event Details' tab.

### 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:
  - 2Checkout 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.



ST10110880 from AT131725 (F2F) - Test Training OA F2F

Event Details | Event Fee/Payment Details | Session Details | Registrations | Activate Event

Is there a fee for this event \*  
Yes

Amount of fee \*  
\$

Is the fee refundable \*  
This field is a required field

Payment Method \*  
2Checkout Payment Processor  
External Payment Processor  
This field is a required field

Previous | Next

Two red arrows point to the 'Is there a fee for this event' dropdown and the 'Payment Method' dropdown.

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**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 once a session has been added.

ST10110880 from AT131725 (F2F) - Test Training OA F2F

Event Details | Event Fee/Payment Details | Session Details | Registrations | Activate Event

Registration Opens: \*      Registration Deadline: \*

           **+ Add Session**

Event Title	Session Date	Start time	End time	Attendees	Registration Deadline

- 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.**

Add Session

**Session Info**

Date of Session:

Start Time:       End Time:

Select Start Time      Select End Time

Instructors:

Select...

**Session Location**

Address:

Address2:

City:       Zip Code:       County:

Select...      Select...

**Contact Information**

Use Training Organization Contact Information

Name:       email:

Phone:       Organization:

OCCRA Main Office

Information entered here will display on the training details page for registrants to view

Save & Close      Save & Add Session

- **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 30<sup>th</sup>, 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.

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- 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 registrants 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.

Event Details | Event Fee/Payment Details | Session Details | Registrations | Activate Event

Is this a private event? \*

Yes  
No

search on the Ohio Professional Registry. You will need to provide registrants with the ST (ID) number to register.

By activating this event you are making it open for registration.

Activate Event

Once the event is activated, professionals may search for and register for this event.

## Locating a Scheduled Event (ST)

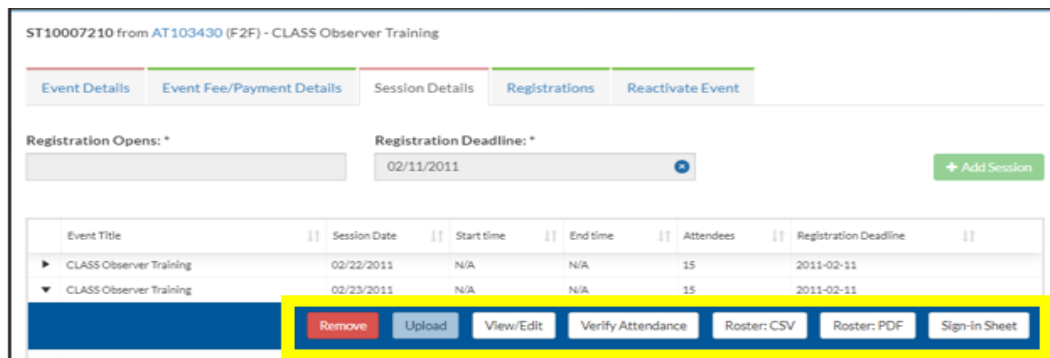
- Go to the Events tab
- Click on the Scheduled Events tab to view all scheduled events.
- Locate the ST via the filters at the top of each column or click on each column header to sort that field.
- To view available actions for an event, click the arrow on the far left of the table; a new field will open with an Edit button.
- Click edit to view the ST

ST	Title	# Reg	Date	Reg Open	Reg Deadline	County	# Hrs	Private	Status
10110880								All	All
▼ 10110880	Test Training OA F2F	0 of 5	09/20/2021	09/20/2021	09/20/2021	Franklin	3.00	No	Active

Edit

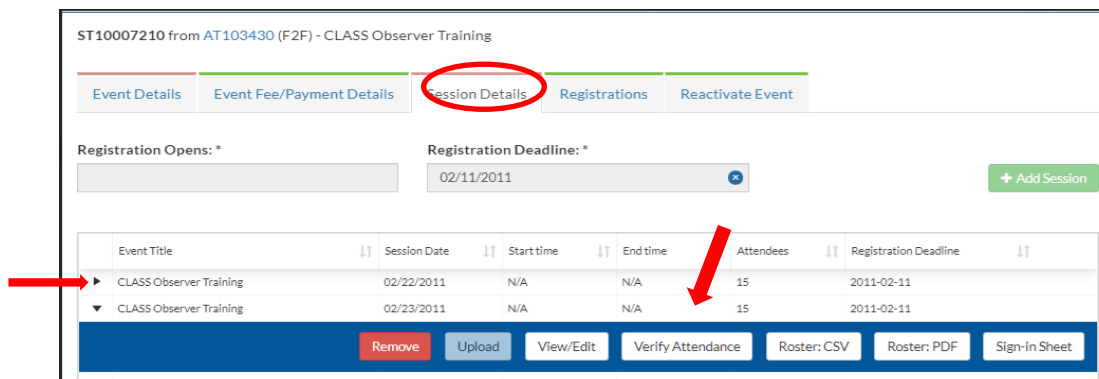
## Manage PD Event– view registrants, add registrants

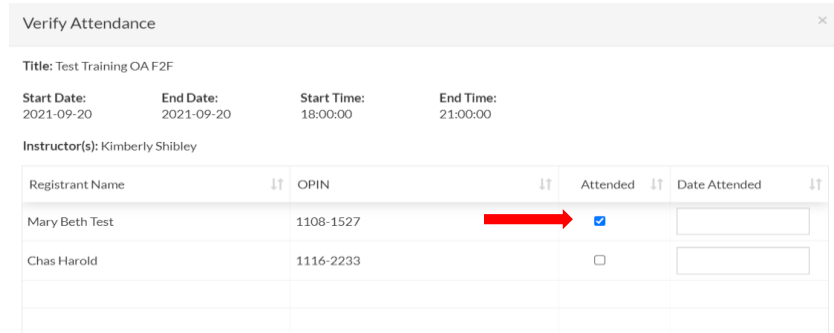
1. Log in to your profile.
2. Go to the **Training Organization Dashboard** and choose **Events**; choose **Scheduled Events**.
3. Filter the Scheduled Events by Event ST Number, Title, Status, etc.
4. Locate the ST and click the arrow on the far left of the table to access the Edit button and view the ST.
5. Go to the Registrations Tab to view professionals who have registered. You may manually add registrants via their OPIN number as well.
6. 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



## Verify Attendance

1. Log in to your profile.
2. Go to the Training Organization Dashboard and choose Events; choose Scheduled Events.
3. Locate the ST and click on the arrow on the far left of the table to access the Edit button and view the ST.
4. Click on the Session Details tab.
5. Click the arrow on the far left of the table to access the additional action buttons and choose Verify Attendance.
6. Click on the box under the Attendees column for each registrant that successfully completed the course. This will send the data to the registrant's profile.





Verify Attendance

Title: Test Training OAF2F

Start Date: 2021-09-20    End Date: 2021-09-20    Start Time: 18:00:00    End Time: 21:00:00

Instructor(s): Kimberly Shibley

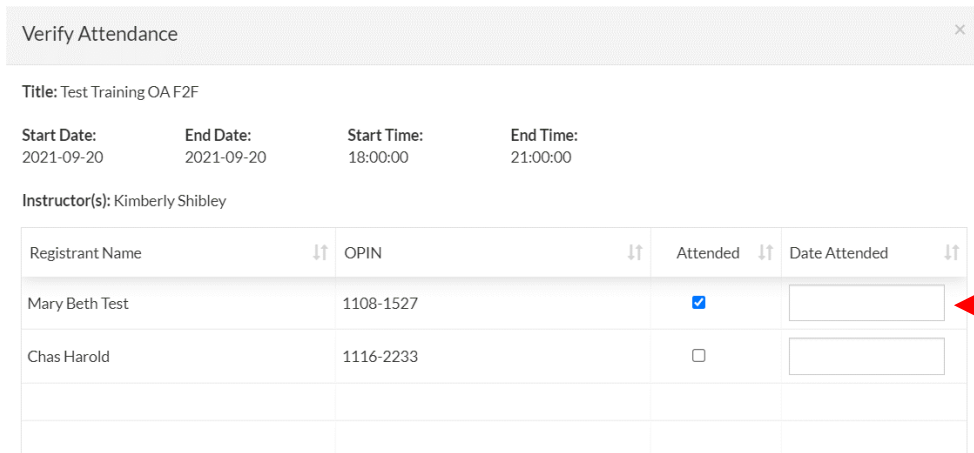
Registrant Name	OPIN	Attended	Date Attended
Mary Beth Test	1108-1527	<input checked="" type="checkbox"/>	<input type="text"/>
Chas Harold	1116-2233	<input type="checkbox"/>	<input type="text"/>

### 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.



Verify Attendance

Title: Test Training OAF2F

Start Date: 2021-09-20    End Date: 2021-09-20    Start Time: 18:00:00    End Time: 21:00:00

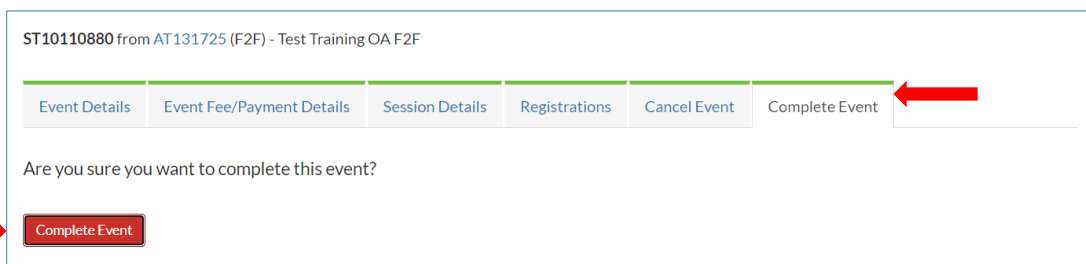
Instructor(s): Kimberly Shibley

Registrant Name	OPIN	Attended	Date Attended
Mary Beth Test	1108-1527	<input checked="" type="checkbox"/>	<input type="text"/>
Chas Harold	1116-2233	<input type="checkbox"/>	<input type="text"/>

### 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”



ST10110880 from AT131725 (F2F) - Test Training OAF2F

Event Details    Event Fee/Payment Details    Session Details    Registrations    Cancel Event    Complete Event

Are you sure you want to complete this event?

Complete Event

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

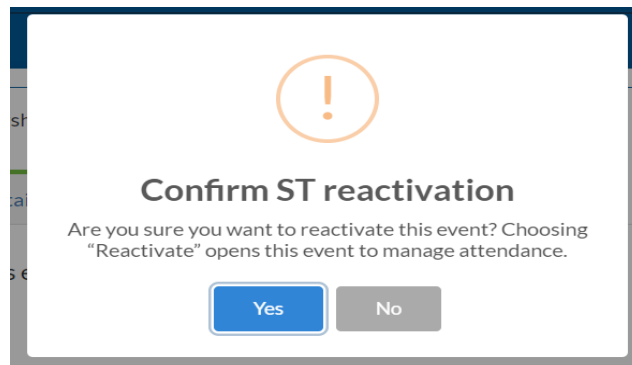
**Reactivate Event –** This process opens the PD Events to allow for revisions to the attendance.

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.

ST10110880 from AT131725 (F2F) - Test Training OA F2F

Event Details	Event Fee/Payment Details	Session Details	Registrations	Reactivate Event
---------------	---------------------------	-----------------	---------------	------------------

Are you sure you want to complete this event?



Questions? Please send an email to [approval@occrra.org](mailto:approval@occrra.org).