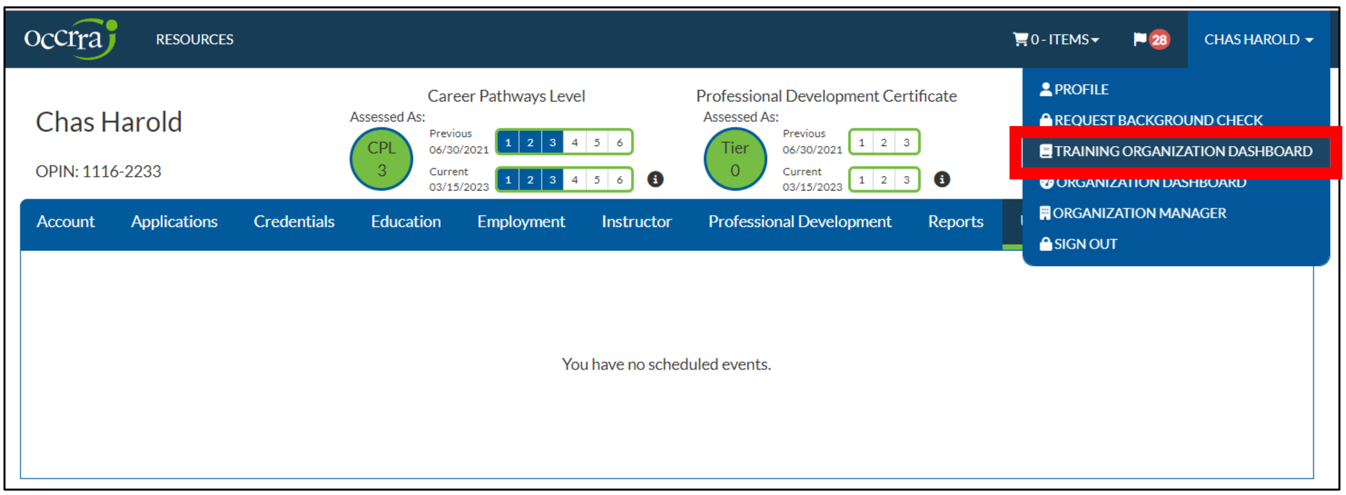
Conference Event Type User Guide

To review the full policy for creating and managing a Conference event, please check out the [Instructor and Professional Development Event Application and Management Policy] manual.

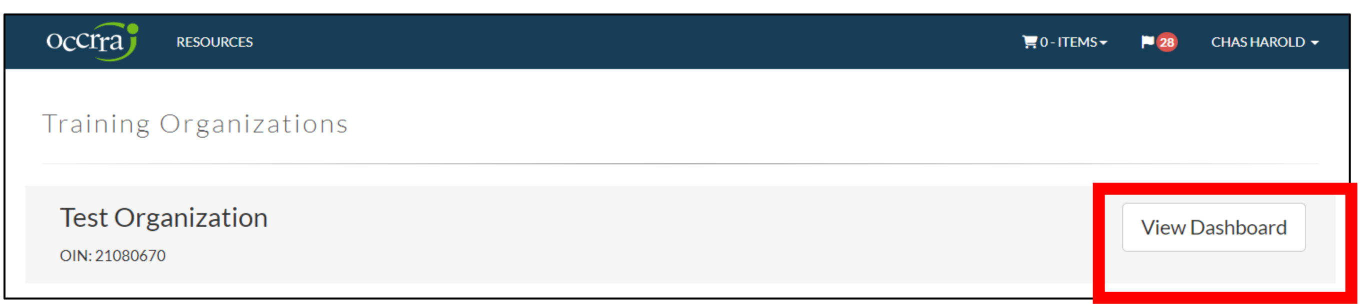
Accessing the Professional Development Event Application

1. Sign in to your Ohio Professional Registry (OPR) profile and select Training Organization Dashboard from the drop-down menu below your name in the top navigation bar.

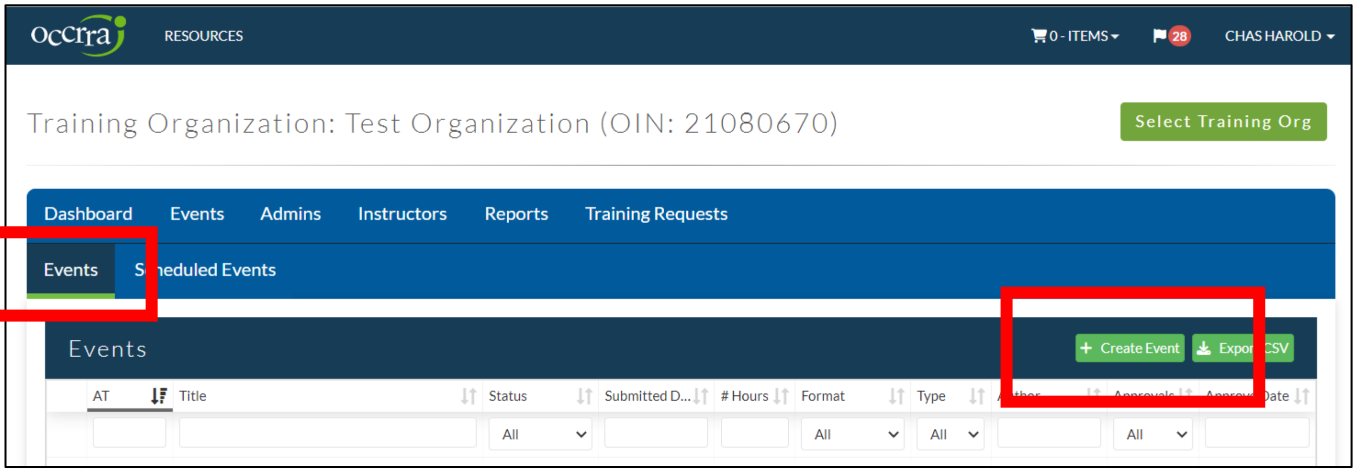


NOTE: This function is only enabled if you are a training organization or have access to a training organization dashboard. You only have access to organizations associated with your OPIN.

2. Select the organization you want to manage and choose View Dashboard.



3. On the dashboard menu, choose Events and then the green Create Event button.



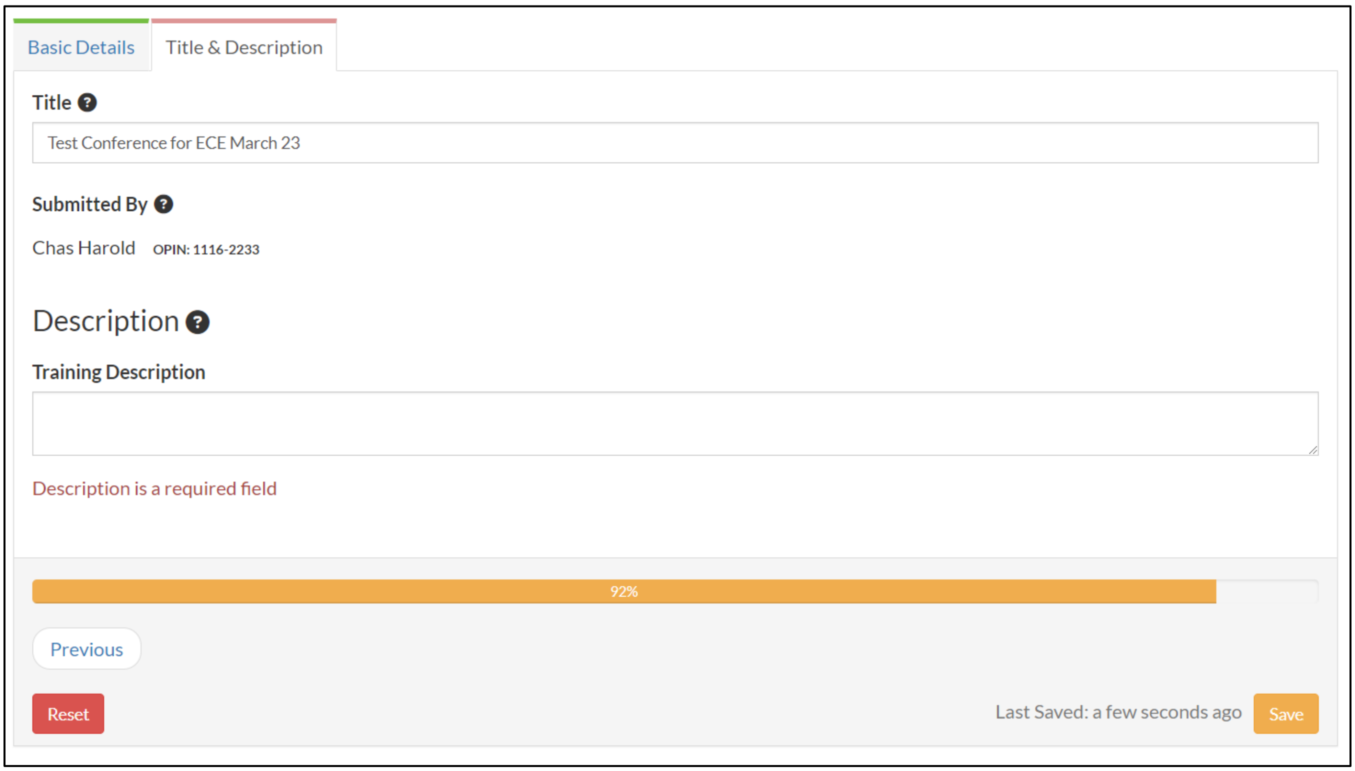
Completing the PD Event Application

Complete the Basic Details page by selecting the Conference Event Type. Review the definition of a Conference and affirm your selection by clicking Agree. For more detailed information on the requirements for a conference event type, please see the [Instructor and PD Event Application Policy and Procedure Manual].

Click Save to add the Conference Event Title & Description.

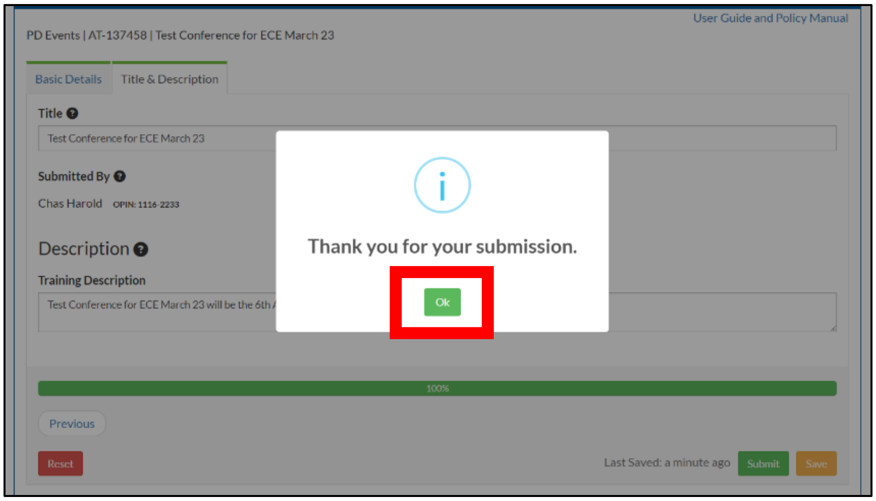
Title & Description Tab

1. Enter the Conference title and Conference Description. Both the Title and Description will be visible to professionals in the Professional Development search. Only include items you want them to see in these fields.

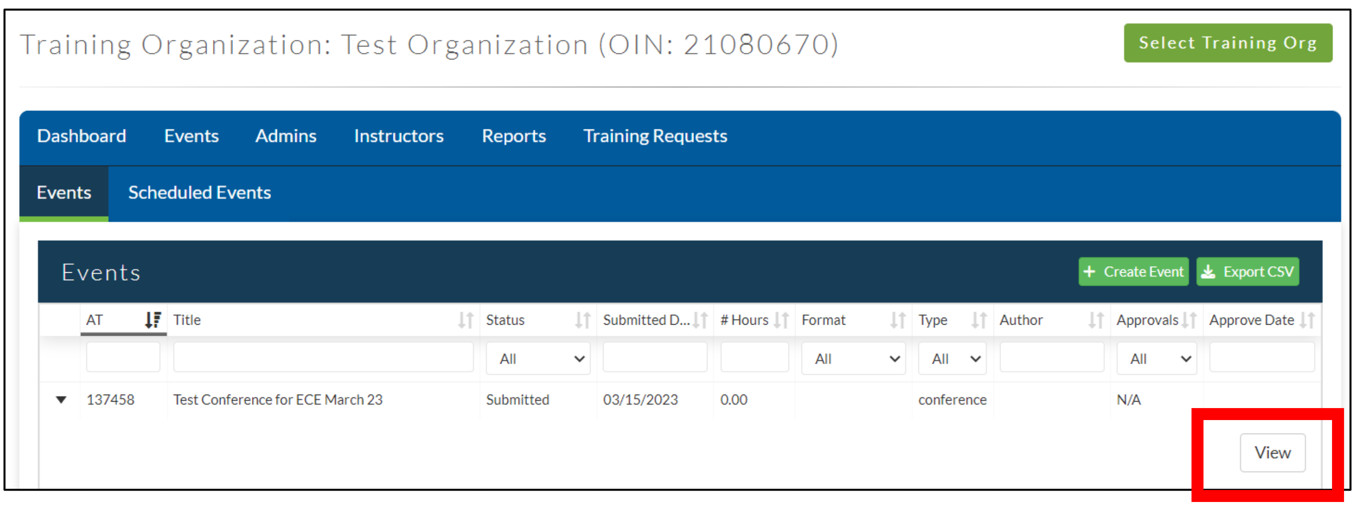


- Clicking Save will save the Conference Event application progress.
- Selecting the Reset button will clear the application and start the progress over. Only select this if you are certain you no longer want the information.

2. Save the application, and if it is complete, submit it for Approval team to review. They will approve, deny, or mark for additional action if more information is needed.



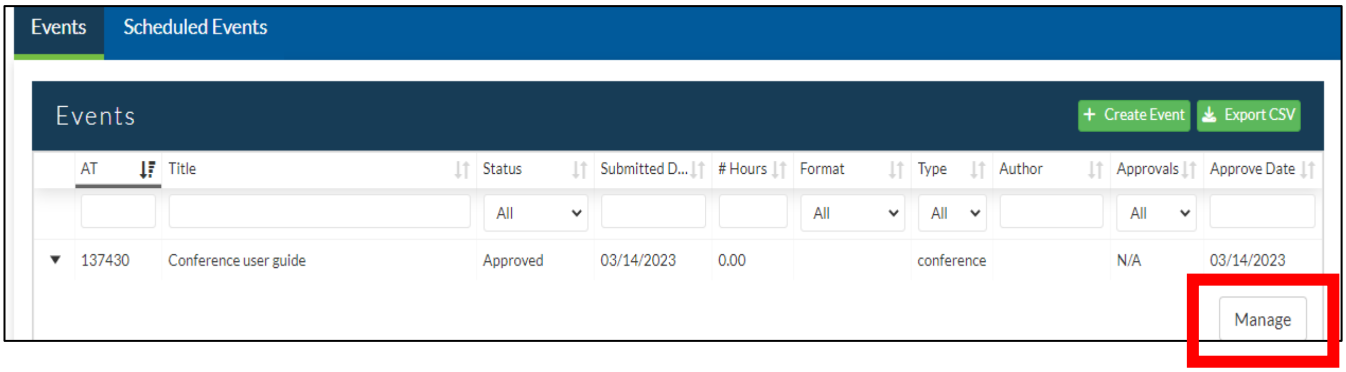
3. The Conference event is now in submitted status. Click view if you wish to view your submission. You cannot move forward until the Conference event has been reviewed and approved through OCCRRA.



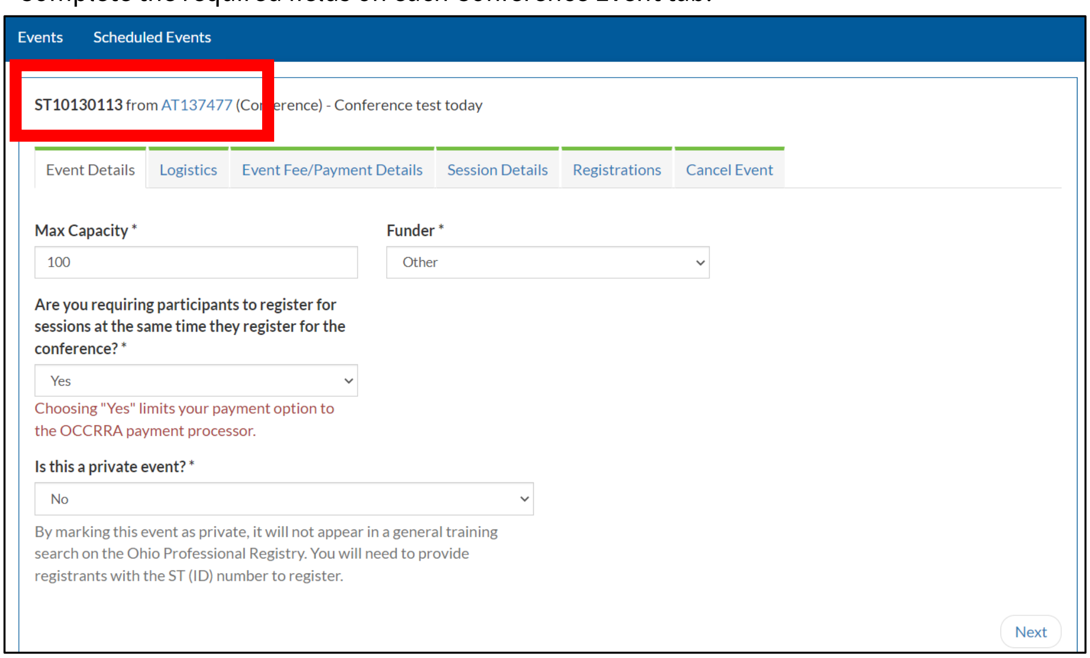
Manage a Conference Event

After your Conference Event is approved, you can manage and create the scheduled event.

1. Go to your Training Organization Dashboard, choose the Events tab.
2. Locate the event, click on the arrow on the far left of the event to open the menu and select Manage.

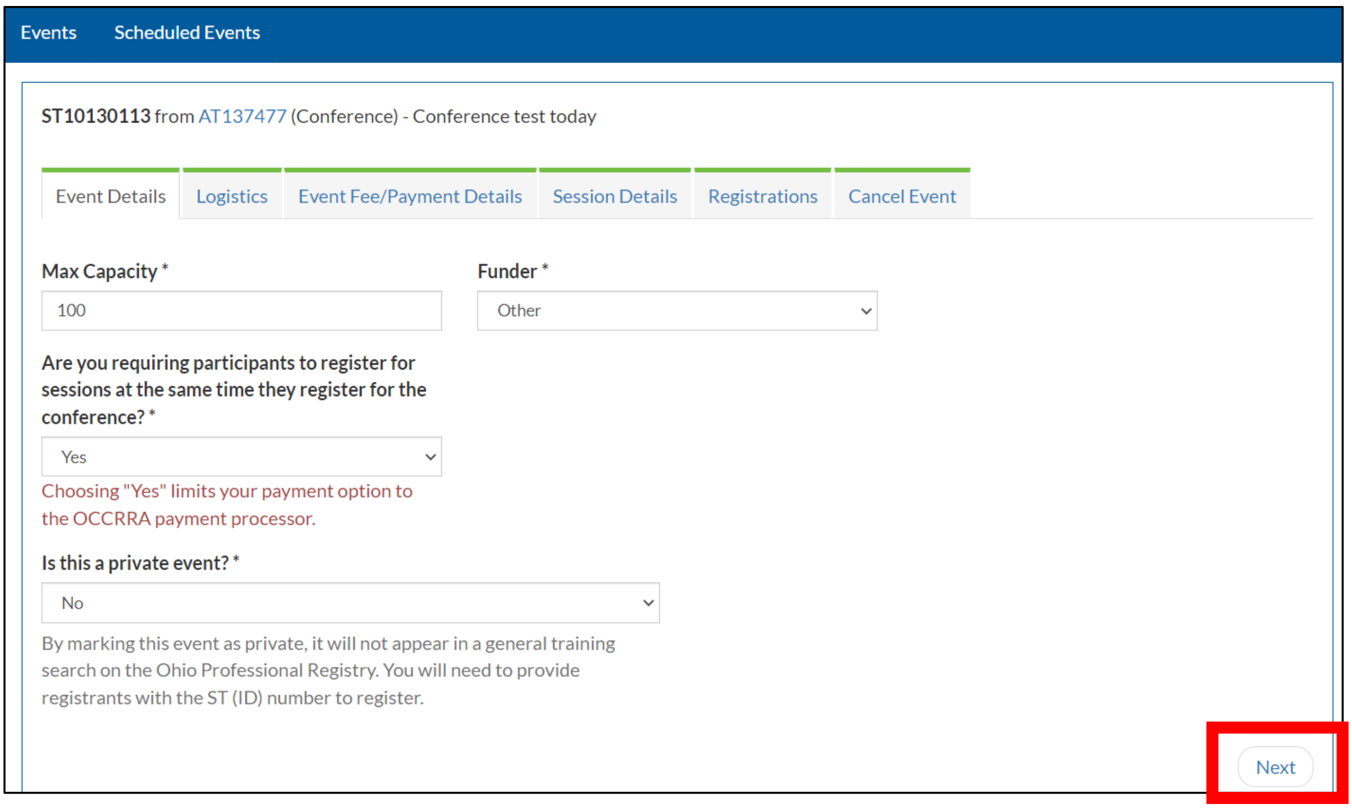


3. A unique 8-digit ID number called the ST (Scheduled Training) will be assigned to the event. This number can be provided to professionals so they can easily find the Conference in the PD search or for private events.
4. To view the Conference event Title and Description tabs you can click on the AT number just above the event's tabs.
5. Complete the required fields on each Conference Event tab.



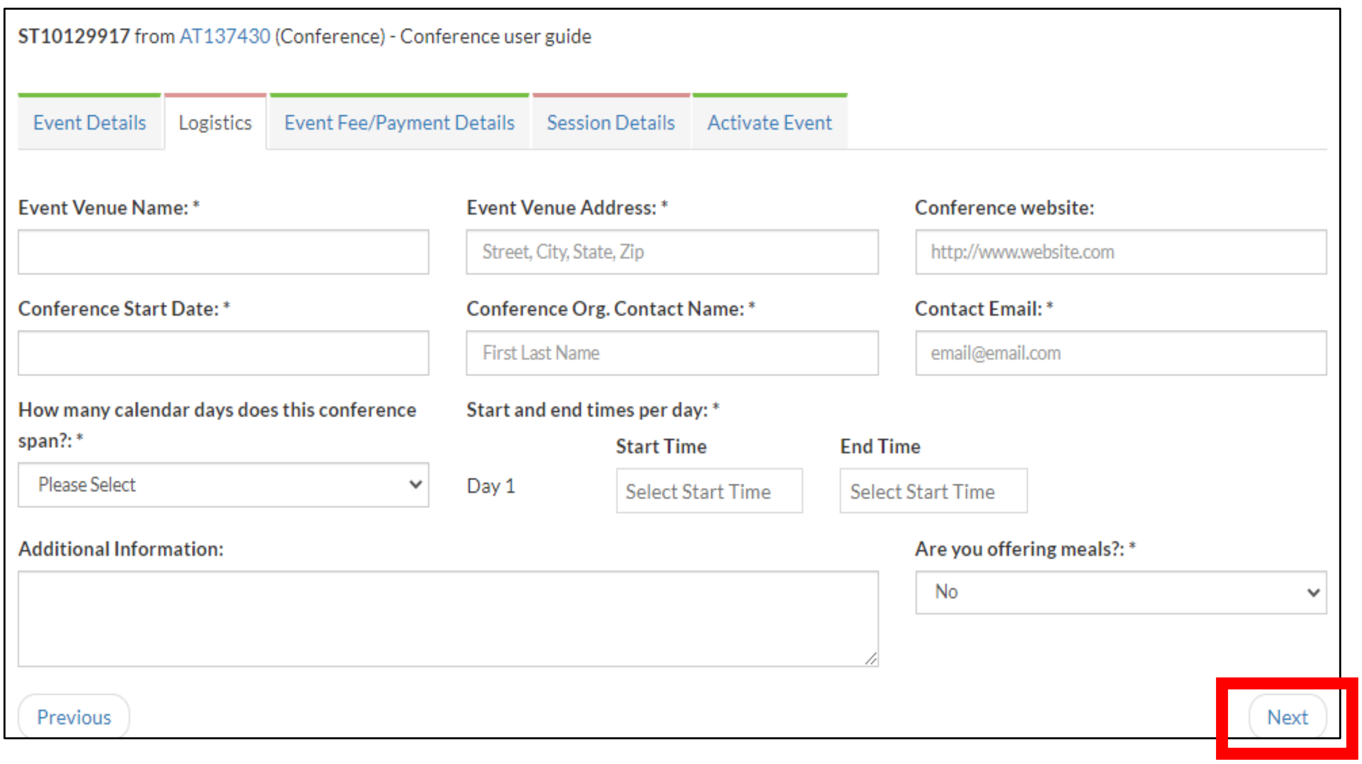
Event Details Tab

1. Enter the max capacity for the conference.
2. The funders field is for those events sponsored by a specific initiative. Choose N/A if this does not apply to your event.
3. Choose Yes if you are requiring participants to register for sessions when they register for this event in the OPR, otherwise choose No.
4. Set the event as “Private” or “Public.” 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 who have a profile in the OPR.
5. Click on the “next” button to save and move to the next tab.



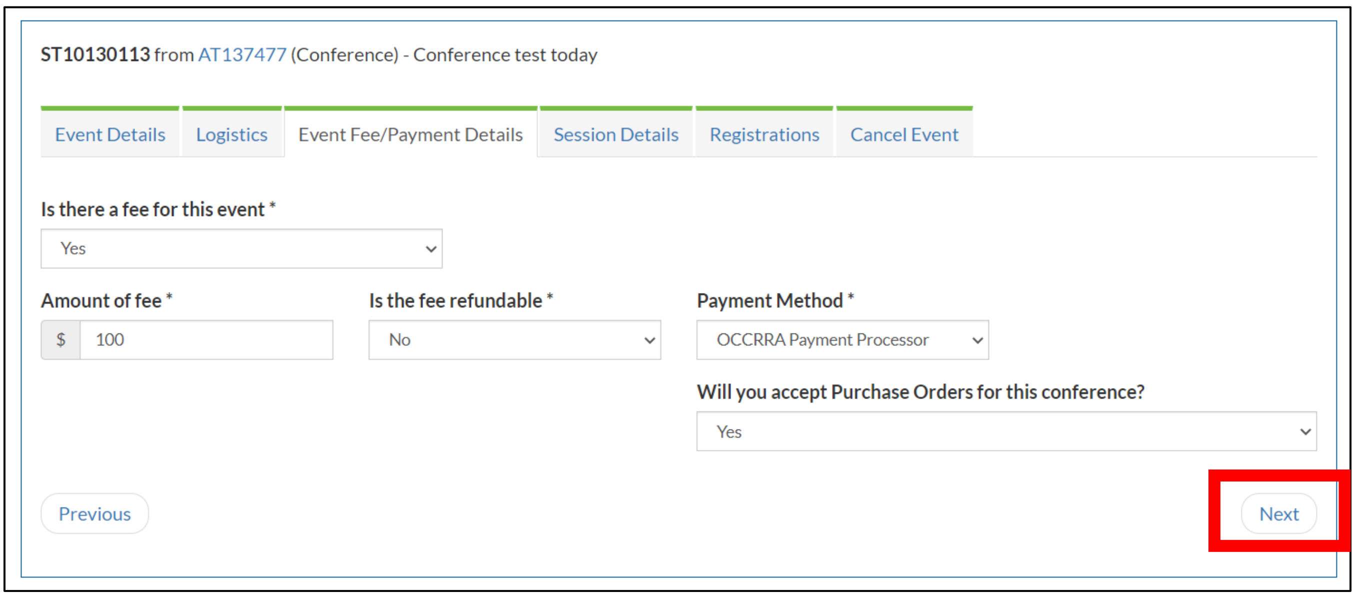
Logistics Tab

6. Enter the event venue name and address.
7. Provide a conference website URL if available – not a required field.
8. Enter the Conference Start date.
9. Enter the Conference Org Contact Name – who the registrants can contact for assistance.
10. Enter the contact email for the conference.
11. How many calendar days – enter the number of days the conference will be conducted, click inside the box and select the number of days.
12. Enter the start and end time for each day of the conference.
13. Additional Information – provide instructions or details for registrants.
14. Are you offering meals – choose yes or no.
15. Click on the "next" button to save and move to the next tab.



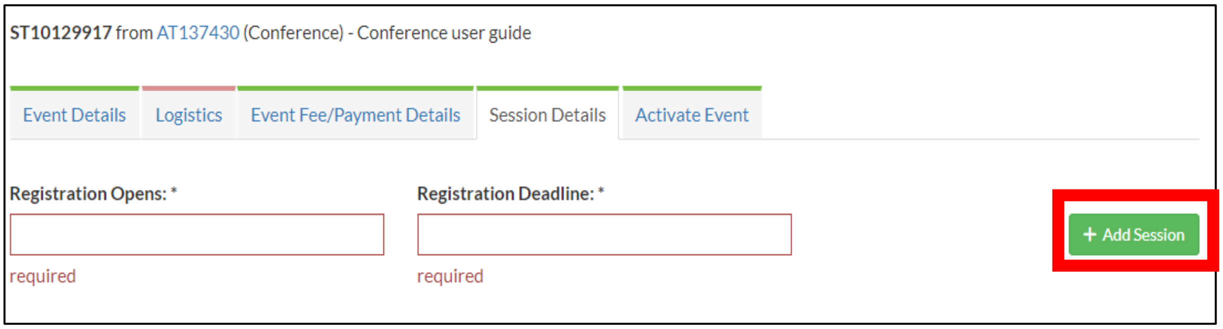
Event Fee/Payment Details Tab

1. Complete the required fields if there is a fee for the Conference event; otherwise, select NO
2. Two payment methods are available:
   - OCCRRA Payment Processor – fees come to OCCRRA and payment is forwarded to the training organization, minus processing fees. There will also be an option to select if a Purchase Order will be accepted for the conference, if yes, OCCRRA will issue the payment to the training.
   - External Payment Processor – upon registering through the OPR, the participants will be directed to the website entered in the field to pay fees. A valid URL (web link) must be entered to use this option.
3. Click on the "next" button to save and move to the next tab.

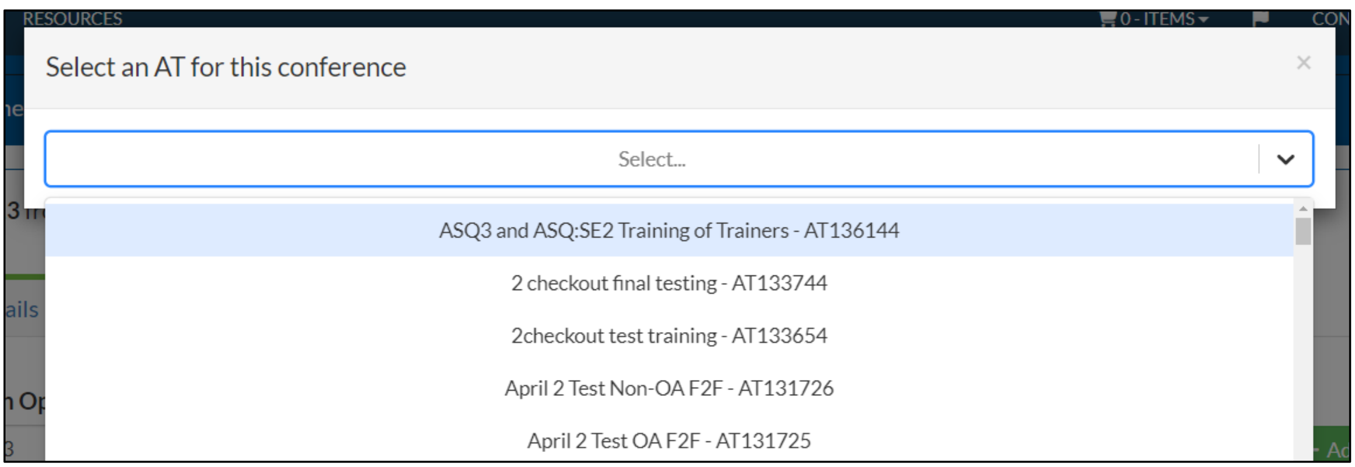


Session Details Tab

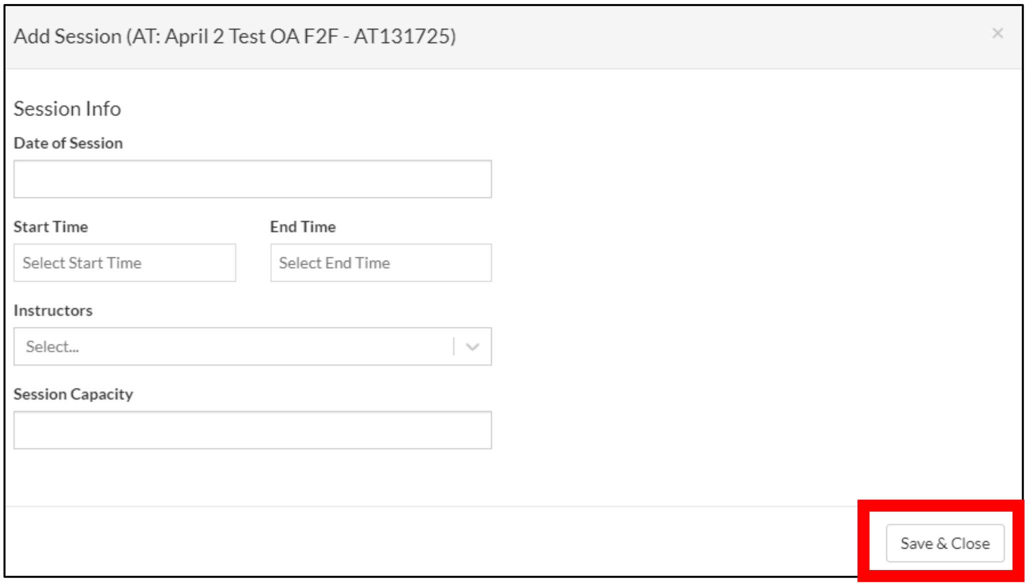
1. Enter the Registration Opens and the Registration Ends dates. The Registration end date cannot go beyond the date of the first session.



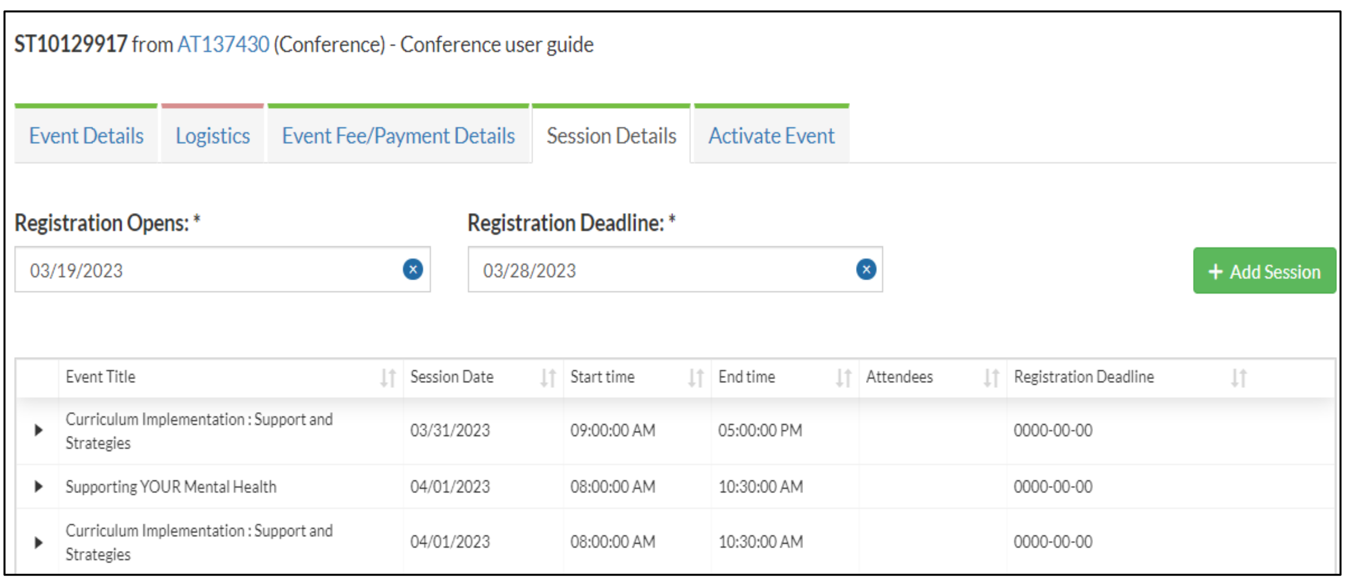
2. Select “Add Session” to choose from approved PD Events listed in your Training Organization dashboard.
    a. This is not a required field to activate the event for registration if participants are not required to choose sessions when registering in the OPR. However, you can add them so they can see what sessions are being offered.
3. Type the AT number, the PD Event title, or scroll through the list to select the PD Event you are adding as a session.



4. After selecting a PD Event to add, the Session Info box will appear. Complete the fields, save & close. This must be done for each session that will be conducted.

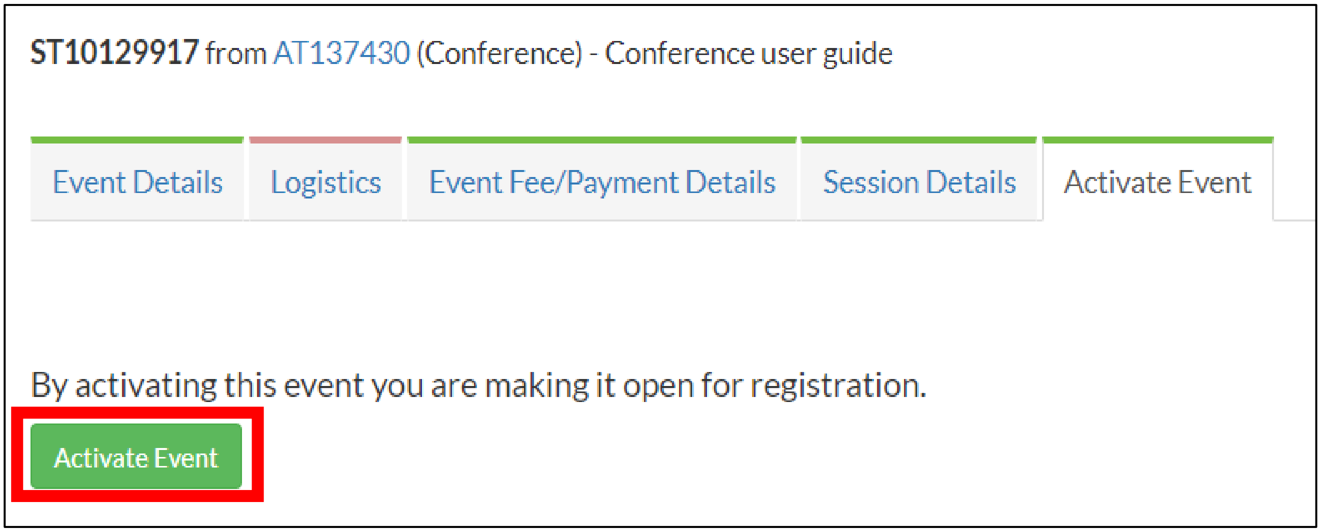


5. The added sessions will populate in a list in the Session Details tab.



Activate Event Tab

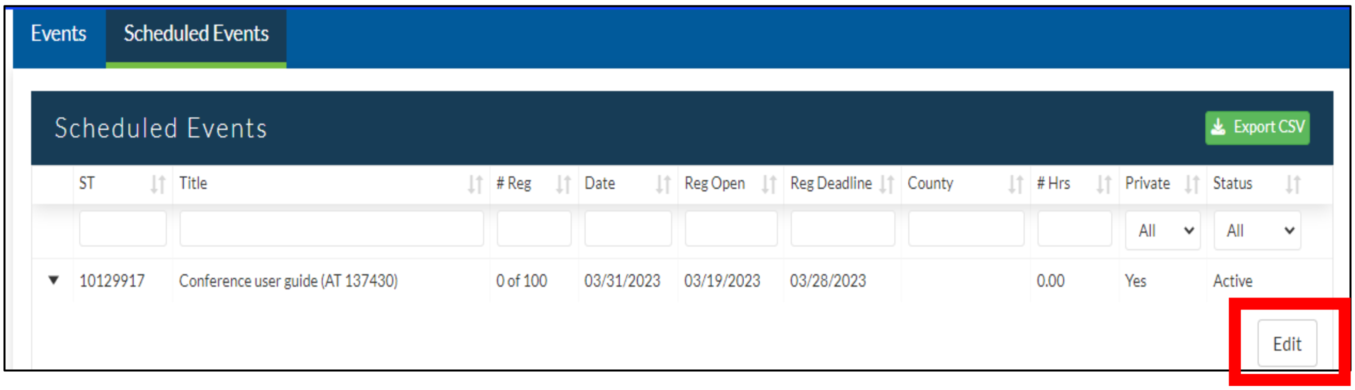
1. You can activate the Conference, which will open it for registration, by selecting the Activate Event button.



2. Professionals can now use the OPR Professional Development (PD) search to register for the conference.

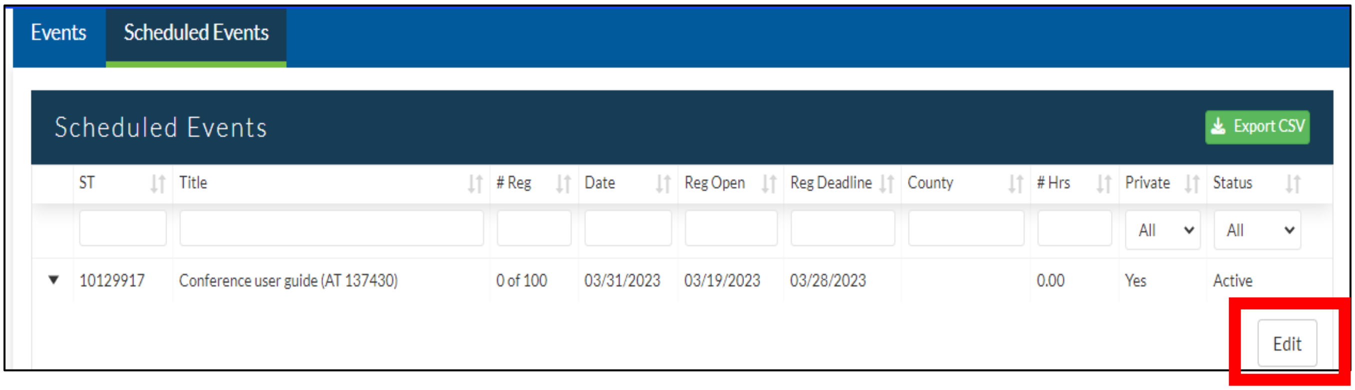
Edit/revise Scheduled Conference Event

1. Go to the Scheduled Events tab of your Training Organization dashboard.
2. Find the Conference event and click on the black triangle on the far left to open a menu.
3. Choose “Edit” to make revisions and edits after activation for the dates, times, adding or removing sessions.



Manage Conference Registration and Attendance

1. Locate the Conference Event on the Scheduled Events tab of your Training Organization Dashboard.
2. Click on the black triangle located on the far left to open a menu.
3. Choose “Edit” to manage registrations and attendance.

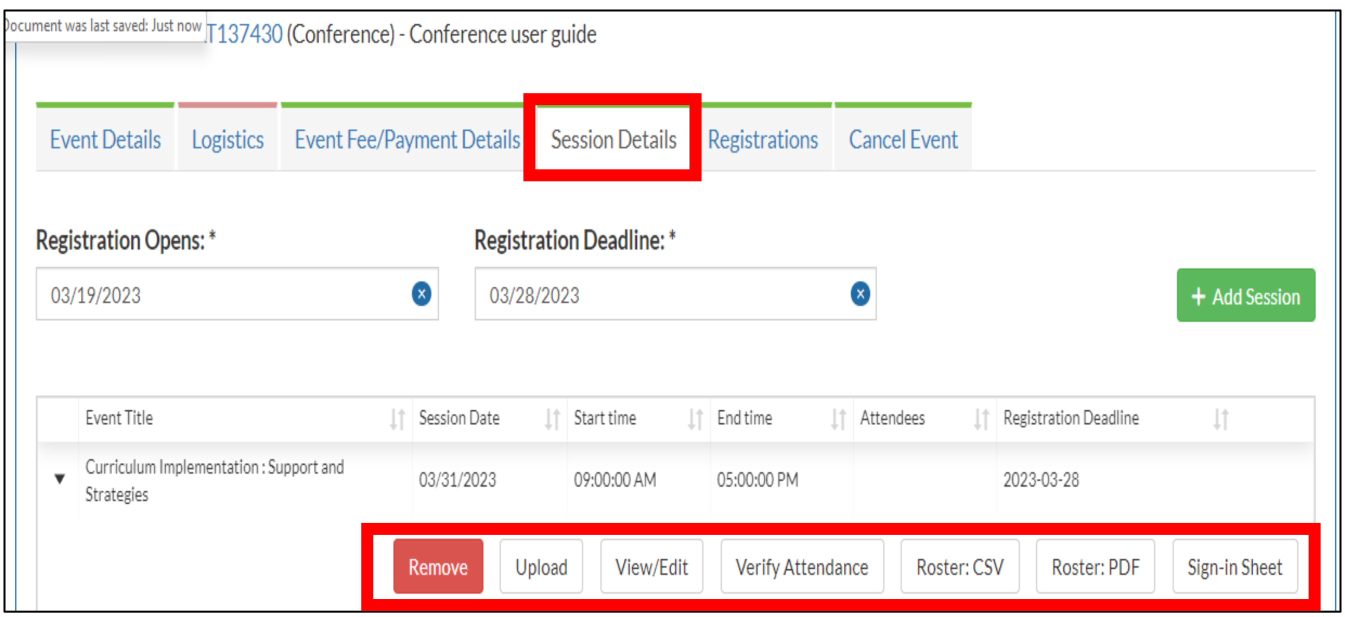


Registrations

1. Go to the Registrations tab to view professionals who have registered.
2. You can manually add registrants via their OPIN number.

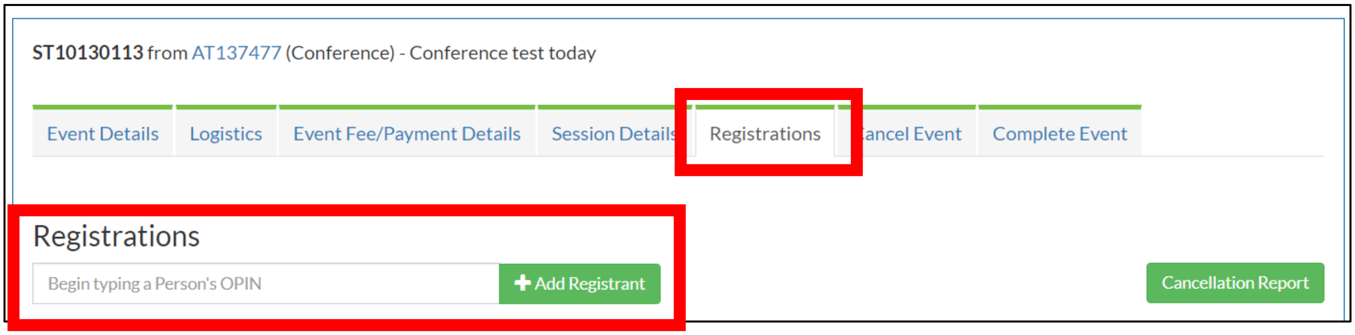
Attendance

1. Go to the Session Details, locate the session that you want to mark attendance.
2. Click on the black triangle located on the left of that session to open a menu.
3. Remove – deletes the session including the registration and the attendance.
4. Upload – upload a CSV file for large attendance rosters and special events (conferences, etc.); this will add registrants to the session.
5. View/Edit – view the Session Details and add information for participants if needed.
6. Verify Attendance – mark attendance for registrants.
7. Roster CSV– export a csv file of all registrants and contact information populated from their profile.
8. Roster PDF – pdf of roster with registrant name and contact information populated from their profile.
9. Sign In Sheet – to be used to record attendance at an event and view registrant contact information.



Manually Add Registrants

1. Access the scheduled event via steps listed above.
2. Go to the Registrations tab.
3. Type in the registrant's OPIN in the box.
4. Click on the name that lists in the drop-down list.
5. Click the +Add Registrant button.



Add Registrants via CSV Upload

1. Access the scheduled event via steps listed above.
2. Go to the Session Details tab.
3. Click the arrow on the far left of the table to access the additional action buttons and choose "Upload".
4. Upload a CSV file for large attendance rosters and special events (conferences, etc.); this will add registrants to the session. Directions for the csv file type will appear in a pop up box.
5. A CSV must be uploaded for each session.

Verify Attendance

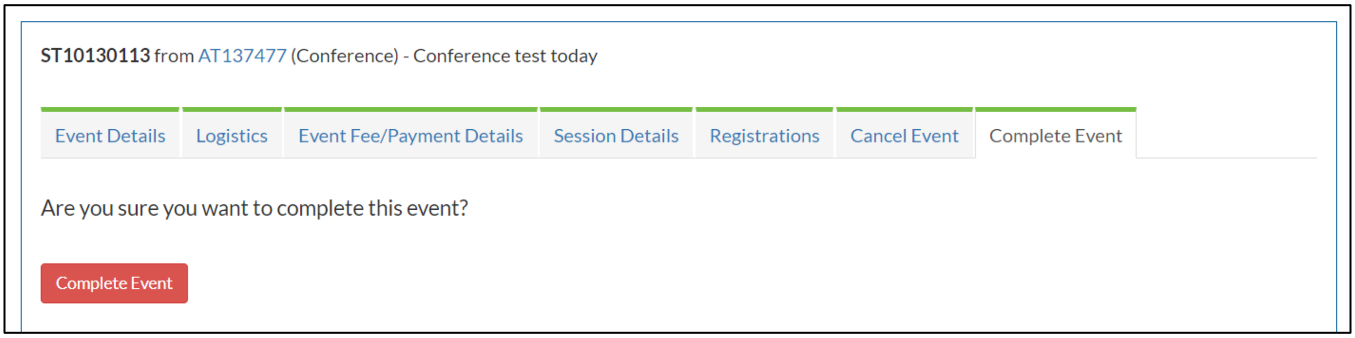
1. Find the conference event in the scheduled events tab of your training organization dashboard.
2. Locate the Event and click on the black triangle on the far left to access the "Edit" button and view the scheduled conference.
3. Click on the Session Details tab.
4. Click on the black triangle on the far left of a session to open the menu of options.
5. Choose "Verify Attendance".
6. Click in the box under the Attended column for registrants who successfully completed the session. This will send the data to the registrant's profile.

Complete Conference event

This process closes the Conference event and no further edits can be made.

Once attendance has been verified:

1. Click on the Complete Event tab.
2. Select “Complete Event” and Select “Yes”.



Please contact us at support@occrra.org for questions.