Training Organization Dashboard User Guide

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 OCCRRA 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 can complete a request a for a Training Organization to create, submit, and post PD events via the Applications tab in your profile.

Please note, if you are already associated with a training organization, the administrator of that dashboard will need to grant you access/permissions for that dashboard.

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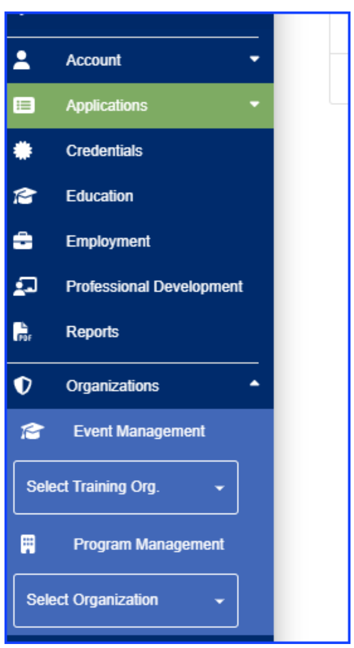
Training Organization Dashboard – Granting Access

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

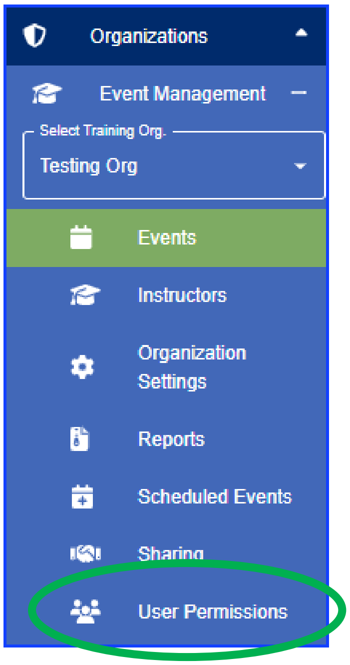
To grant access:

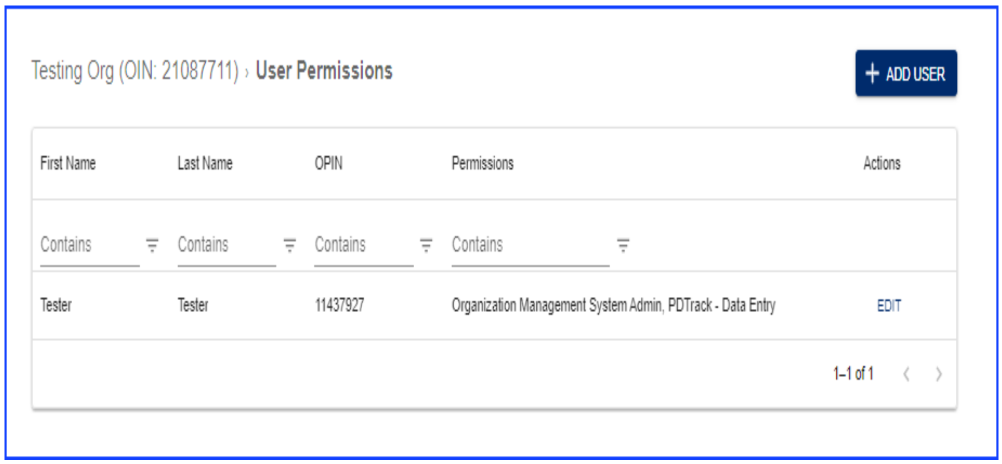
1. Log in to your Ohio Professional Registry profile
    1. From the menu on the left, choose Organizations, find Event Management, and then Select Training org.



2. Select the training organization you want to manage from the list, a menu of options will list on the left side panel.

   - Select User Permissions
   - Select Add User
   - Enter an OPIN and check each permission you are granting





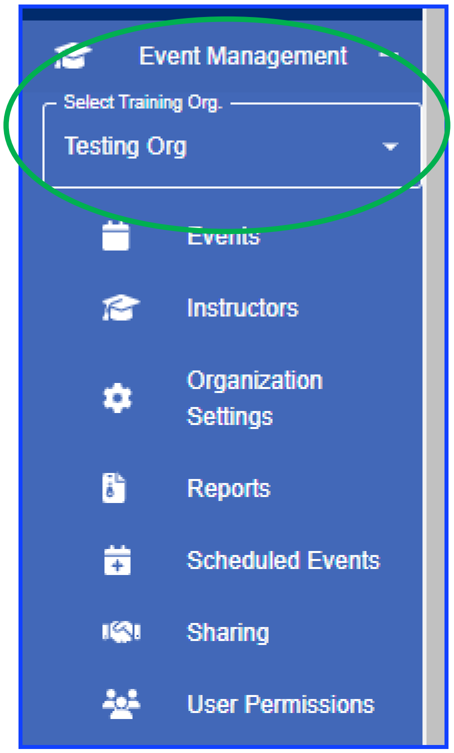
Training Organization Dashboard User Guide

Ohio Child Care Resource & Referral Association

Using the Training Organization Dashboard

1. Visit https://registry.occrra.org/ to sign into your profile.
2. Select Organizations from the menu on the left,
3. Select Training Org and choose the training organization you want to access to view the Events Page and other options.

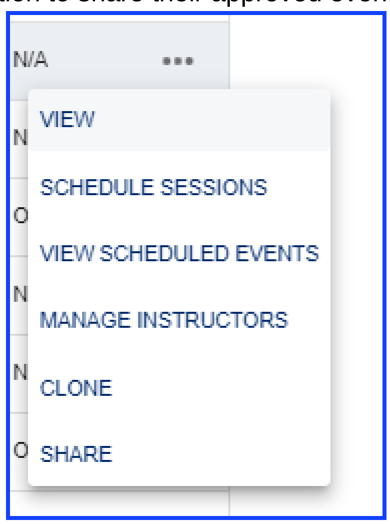
This function is only enabled if you are a training organization or have been granted access to a training organization dashboard. You only have access to organizations associated with your OPIN.



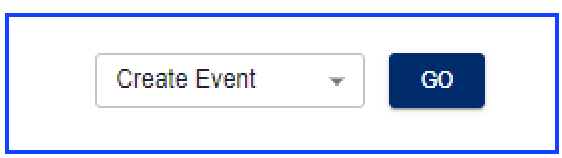
Events

1. On the Events page view all PD events associated with the training organization, create a new PD Event and complete the application, and manage scheduled PD events.
    - Use the filters at the top of each column for various options

2. To view available actions for an event, click the ellipsis () on the far right of the event; a menu will open with additional action buttons.
    a. View/Edit opens the event application.
    b. Schedule Sessions opens a new page to schedule the event
    c. View Scheduled Events – view all previously scheduled events for that AT/Event
    d. 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.
    e. Clone allows the training organization to update an approved application
    f. Share allows the training organization to share their approved events with other training organizations



3. To create and submit a new PD Event application, click on the blue "GO" button in the top right corner next to Create Event. A new application will open –complete the required fields, save it as draft, or submit it for review.



4. Instructors

On the Instructors tab 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 blue Add Instructor button to add via OPIN. Instructors can be removed from the list at any time.

5. Organization Settings

This is only available for those with organization management permission. The option allows the revision and/or updating of the training organization's information (address, phone number, etc.).

6. Reports

Select this to create reports for your training organization. Only organization administrators have this option.

7. Scheduled Events

Select this tab to view all events scheduled by the training organization. Search scheduled events by Event Status, Event ST (ID), or Event Title.

8. Sharing

Share your approved trainings with other training organizations.

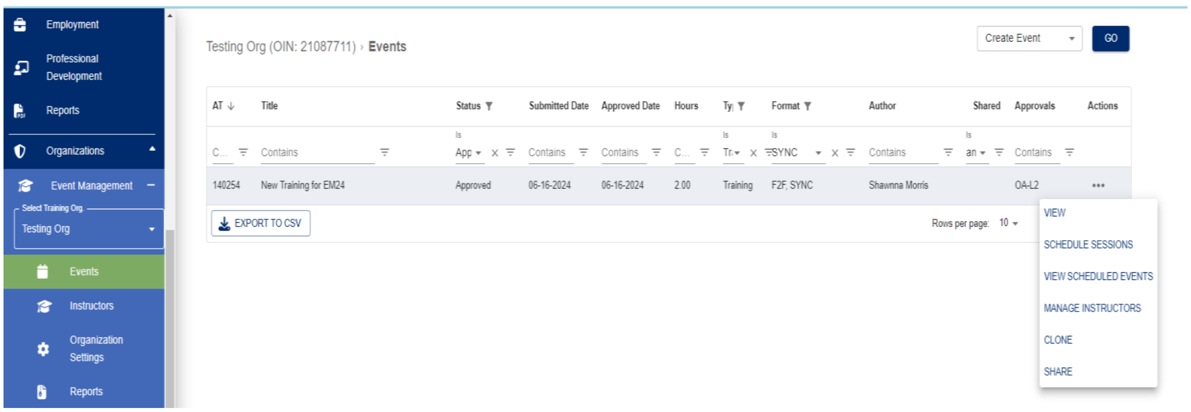
9. User Permissions

This available for organization administrators only to add/remove access to the training organization.

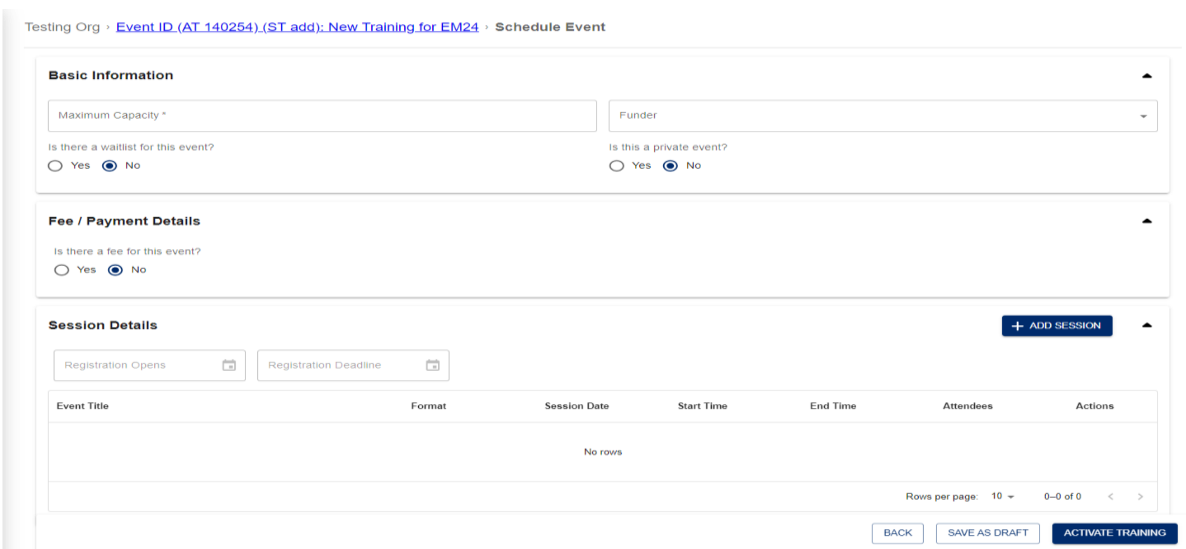
Scheduling and Managing Professional Development Events

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 **Organizations tab** and select your training organization.
3. Locate the intended event, click on the ellipsis located on the right of the event to open a menu.
4. Select **Schedule Sessions**.



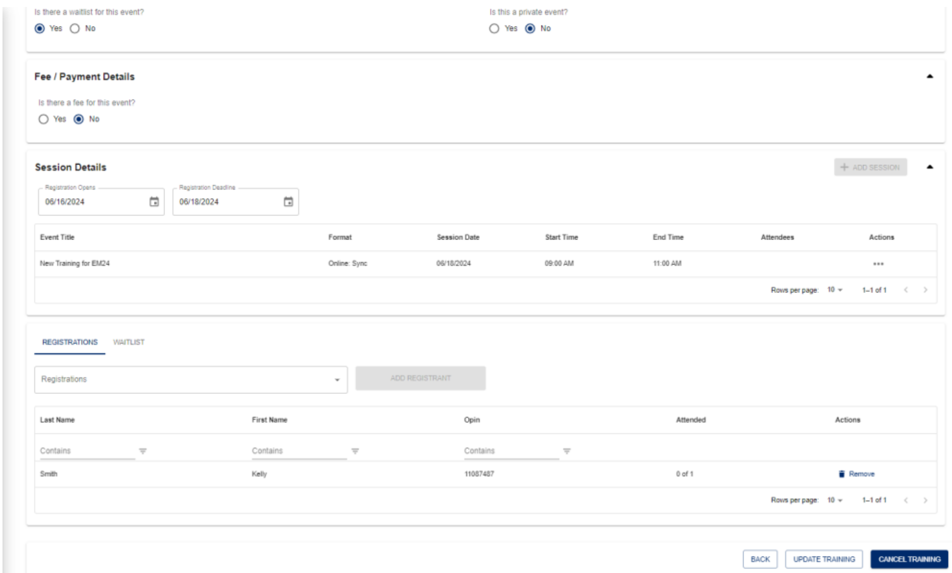
5. Complete all required fields – you must select “Add Session” before adding the Registration Opens and Registration Deadline date.



When all required fields are completed, the scheduled event can be activated so professionals can register.

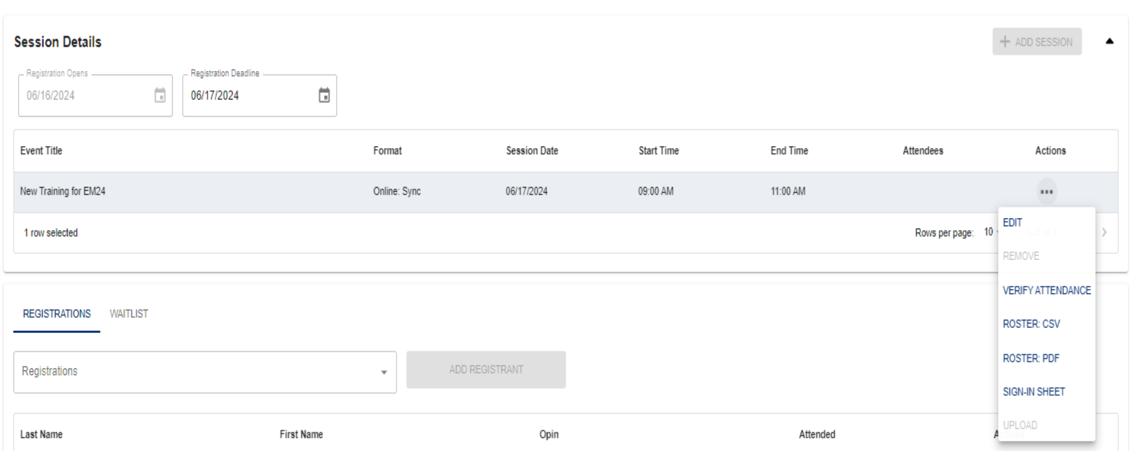
Manage Registration and Attendance

1. **Registrations**
   Professionals can search for and register for your activated scheduled events via the Training Search. All registrants will list at the bottom of the scheduled event:



Training organizations can manually add registrants via their OPIN in the “Add Registrant” section.

2. **Attendance**
   Attendance is marked in the Session Details section in each session.
   Find the ellipsis on the right side of the session, click it to open a menu of options.



Go to Session Details:
Click the ellipsis on the right of the session to access the additional action buttons and choose an action:

- View/Edit – view the Session Details and add information for participants if needed
- Remove – deletes the session including the registration and the attendance.
- 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
- 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

Manually Add Registrants

Access the scheduled event via steps listed above.

1. Type in the registrant's OPIN in the box
2. Click on the name that lists in the drop-down
3. Click on "Add Registrants

To add registrants via CSV upload:

Access the scheduled event via steps listed above.

1. Go to Session Details:
2. Click the ellipsis on the right of the table to access the additional action buttons and choose "Upload"
3. 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

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 ellipsis on the right of the table to access the Edit button and view the ST.
4. Find the Session Details section.
5. Click the ellipsis on the right of the session to access the additional action buttons and choose Verify Attendance.
6. 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.

In the Date Attended column, click in the box next to the checkbox for each professional and type in the actual date of completion. See additonal guidance here: https://d2hfgw7vtnz2tl.cloudfront.net/wp-content/uploads/2024/07/EM_AsynchScheduleManage2024.pdf.

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 select Scheduled Events.
2. Locate the ST and click on the ellipsis on the right to access the Edit button and view the ST.
3. Choose Edit
4. Select the Reactivate Event button at the bottom of the page.
5. Choose "YES"
6. Revise/verify attendance.

Questions? Please send an email to approval@occrra.org.

Permissions

Organization Management System – Administrator permission; add/remove users, permission, update organization settings (organization information)

PD Data Entry – permission includes access to the PD Event application, scheduling an event, managing a scheduled event (ST) including registration and attendance.

PD Reports – permission to use the reporting for the training organization

Instructors

Add instructors who are eligible to present this event; to be eligible, the selected instructor must have been approved in the same Core Knowledge & Competencies (CKC), OA level, and the Groups Related to Content that were selected in the approved PD Event application.

An error message, "This instructor's approval level, CKC, and/or Groups Related to Content do not meet those listed in this AT" will appear if the OA Instructor does not meet the required areas.

Adding instructors is an option for those with organization management permission.

Clone

Allows the training organization who owns the content to update an already approved PD Event.

Revisions to an approved AT are limited to adding a delivery method, updating references, updating the outline of content, updating materials, adding a PD Topic. If any other sections need to be revised, then a new PD Event application is required.

Six-year review/revision - Content should be updated every six years with up-to-date references (within the last five years) and up-to-date materials.

Add PD Topic areas – approved PD Events can be cloned to add a PD Topic area.

Share an AT

Allows the training organization that owns the PD Event/AT to share the approved events with other training organizations.

Sharing is an option for those with organization management permissions only.

The PD Event owner selects "Share" from the menu for a specific AT and enters the OIN for the training organization that they intend to share to.

Communicating between the PD Event owner and another training organization is the responsibility of both parties as the OIN (Organization Identification Number) must be entered to allow sharing.

Sharing can be revoked at anytime by either training agency. In this case, all scheduled events (ST) for that PD Event/AT will remain in the training organization that scheduled them.