Schedule a PD Event Guidance

Ohio Approved training must be scheduled through an Ohio Approved training organization dashboard so professionals can use the training search to register for the approved PD Event and receive credit after completion of the training event. Only approved PD Events (ATs) can be scheduled.

For information on Training Organization, view the guidance here.
The Ohio Approved PD Event Application process guidance can be found here.

The training organization and its instructors are responsible for managing the scheduled event, including the time and date of the scheduled event (ST), listing the instructor(s), providing instructions, and verifying the attendance of the professionals who successfully complete the PD Event.

To view a specific function of Scheduling an Event, click on the underlined word of that function from the list below:

- Create a Scheduled Event (ST)
- Manage a Scheduled Event (ST) revise/edit, view or add registrations, manage waitlist, view/print rosters
- Verify Attendance
- Complete or Reactivate an ST
- Troubleshooting tips

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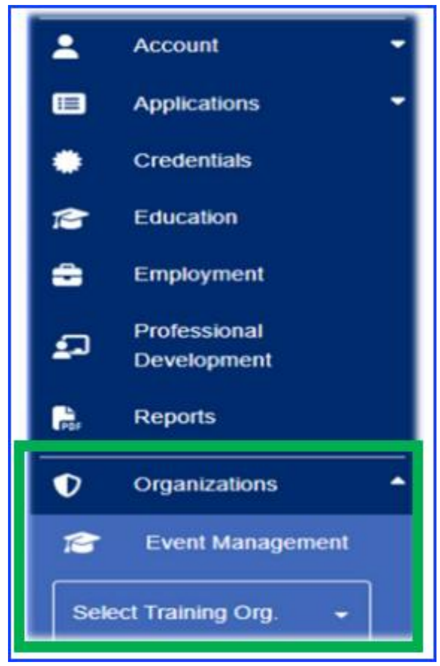
<u>Schedule an Event</u>

- Sign in to your Ohio Professional Registry (OPR) profile
- Find the Organizations tab from the menu option on the left side panel
- Click the arrow to open a menu
- Click inside of the "Select Training Org" box
- Choose your Training Organization
- *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 organization associated with your OPIN.*



A menu of options/tabs will be listed in the panel on the left.

- Select the Events tab
- Find the approved PD Event (AT) from the list
- Select the three dots (...) on the far right of the event to open a menu of options
- Select Schedule Sessions

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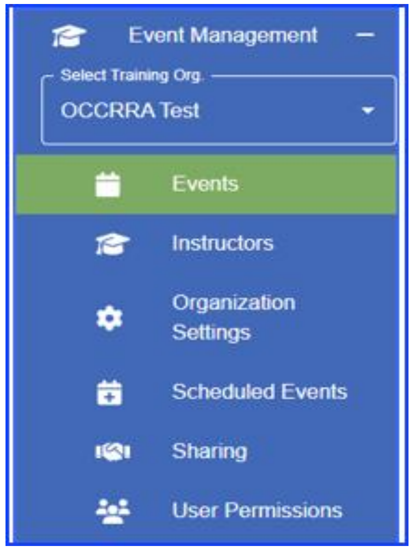

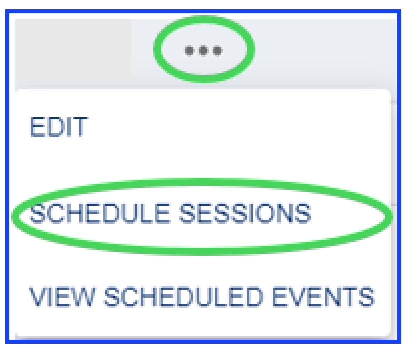

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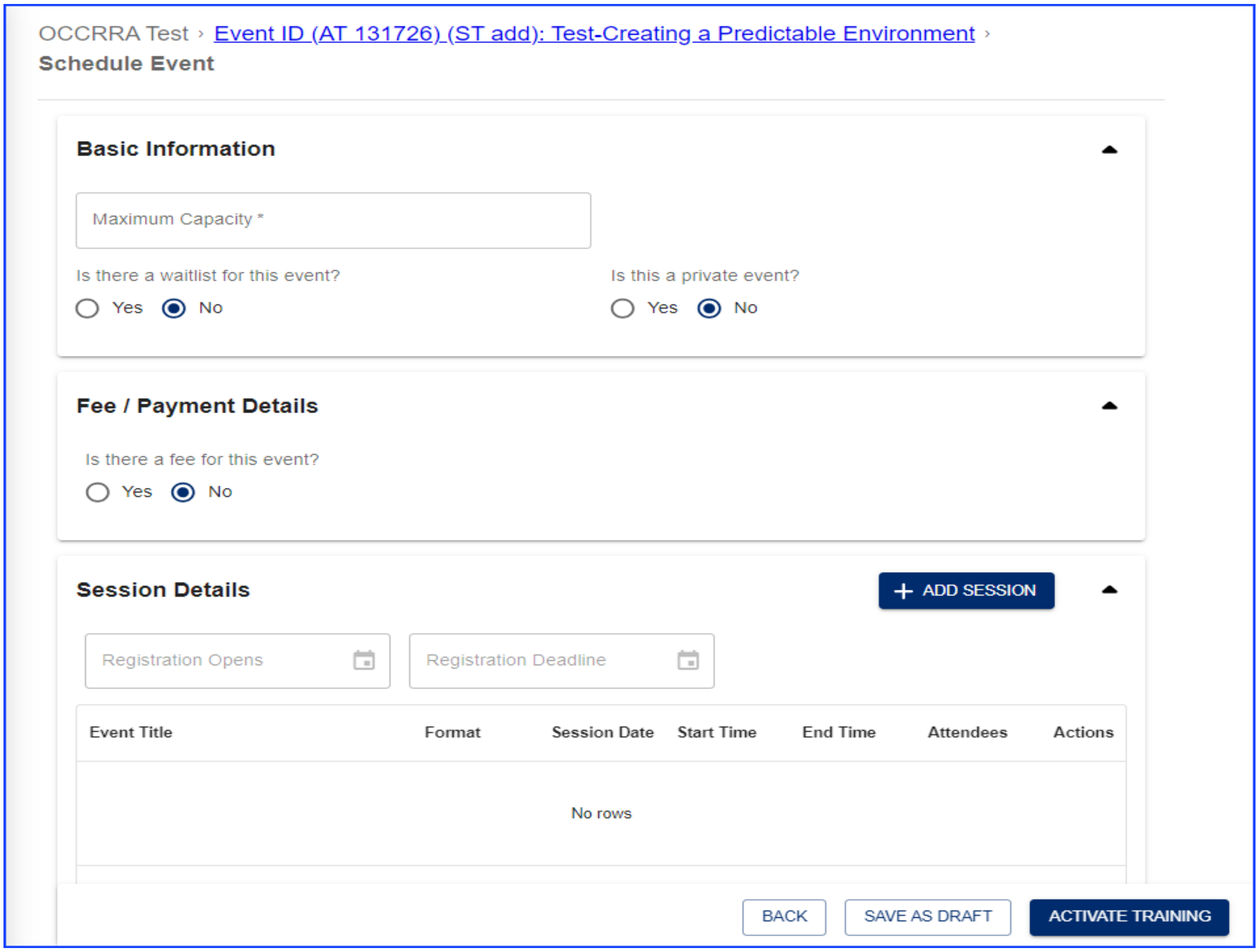
The Schedule Session form will open, complete all fields. Note: this form/model will have varying options for each format type (face to face, synchronous, asynchronous, hybrid).



Maximum Capacity - the number of participants that will be accepted

Is there a waitlist for this event? Click here for waitlist instructions

- YES = a waitlist for registration beyond the maximum capacity, a list will be created and the training organization can add the waitlisted registrants when available seats open.
- NO = once maximum capacity is met, the event will no longer list in the training search and will have a status of “Full.”

Is this a private event?

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- YES = the event will not list in the training search for all to see and only those with the session ID (ST number) can register, or the training organization must manually add the registrations. An ST number will be assigned when the ST is activated.
- NO =the event will be public and all who have access to the training search can find it and register for it.

Is there a fee for this event?

- NO – select and move to the next step
- YES - you will charge a fee upon registration of the event, complete all required fields.
  - External Payment Processor requires a URL to a website where participants can pay for the course on the training agency website.
  - OCCRRA Payment processor – registrants will pay upon registration in the OCCRRA system, OCCRRA will collect the fee and issue payment to the training organization.

Session Details

Select **Add Session** and complete all fields. If there are multiple sessions over several days, add a session for each day.

Format type – select the delivery type of this event; only formats selected in the approved AT/PD Event can be selected, choose one.

Date of Session – the date the PD Event will be conducted

Start Time and End time – the length of that session for that day; must be equal to or longer than the approved AT's time frame.

Instructors – select the approved instructor who will be conducting the session, multiple can be selected; each instructor must be listed in the AT/PD Event to be able to choose in the ST

Session URL – for synchronous training, add the video conference link/ url if available, the registrants will receive the video conference link upon successful registration

Training Notes – add instructions or information that the registrants need to know.

Session Location – for face to face only, in person event, complete all fields

Contact Information – Training organization should provide contact information to the registrants for questions and assistance. This section can be prefilled with the training organization's information by clicking in the box next to "Use Training Organization Contact Information," or can be entered manually

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Save and continue to next step

Registration Opens – the date that the Scheduled Event will be available to register via the training search

Registration Deadline – the last date for participants to register via the training search

Save as Draft if not ready for publishing/posting to the training search, and/or to edit later.

- Click here for instructions for editing a draft.

Activate Training if ready to publish/post to the training search.

Manage a Scheduled Event (ST)

Activate, Revise the date/time/instructor, View and Manage registrations, View and Manage Waitlist, Verify Attendance.

Once a scheduled event (ST) is created, the event will list in the Scheduled Events tab of the training organization dashboard. Access your training organization via the steps outlined on page 2 of this document.

Select the Scheduled Event tab:

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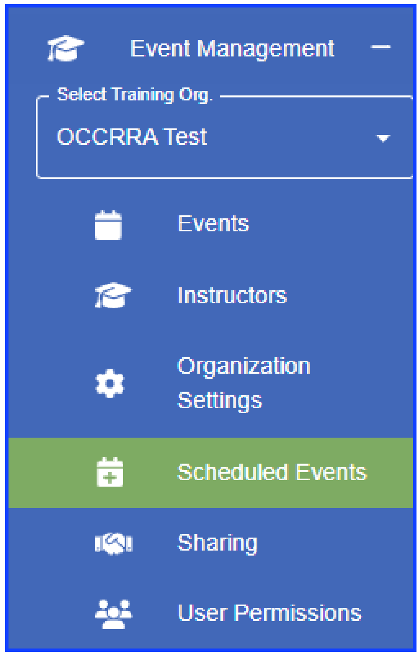
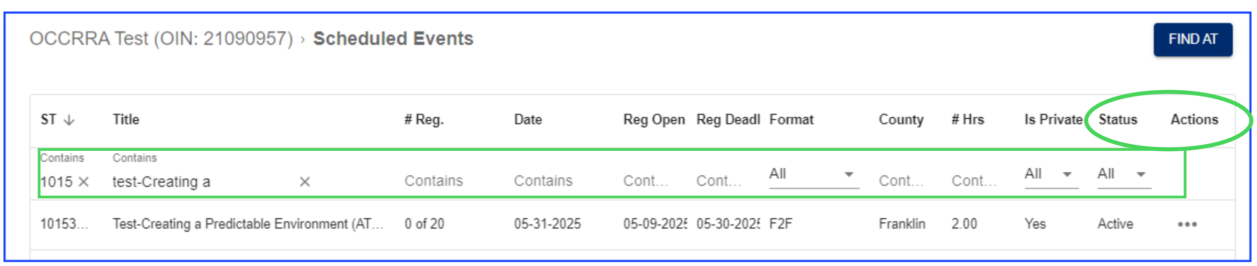


The schedule events queue will open and list all events that have been scheduled.

Find the ST that you want to manage.

Use the filters at the top of each column to narrow down your search if you have multiple STs.



Status column – indicates if your ST is a draft, activated, or completed

- Select the three dots (...) under the Actions column on the far right of the event to open a menu
- Select Edit

Options - the model opens and revisions can be made up to the date of the session. An additional menu is available to revise and take action in each session listed under the session details section.

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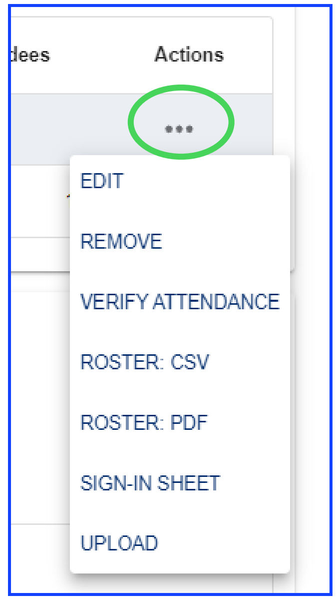
- Edit – opens the session details
- Remove – deletes the session
- Verify Attendance – mark the attendance
- Roster CSV – excel sheet listing registrants
- Roster PDF – PDF listing registrants
- Sign-in Sheet – print for your records
- Upload – upload a csv roster for large registrant list (instructions here)

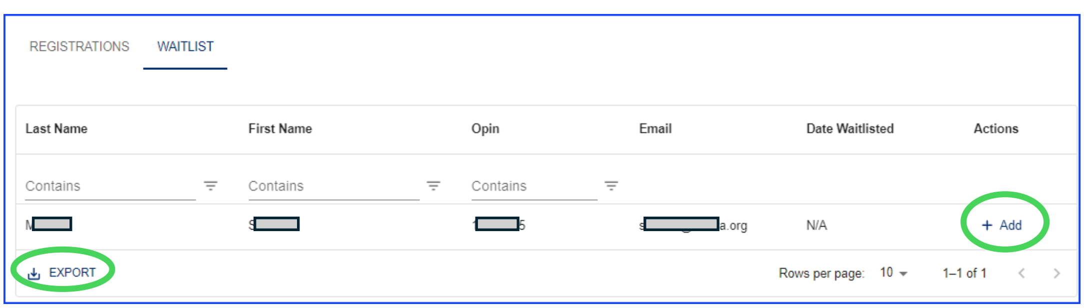


<u>View and Manage Registrations</u>

Access the scheduled event via the instructions of page __, scroll to the bottom of the model to view those who have registered via the training search.

<u>Waitlist</u> – select the Waitlist tab to view registrants who chose to be waitlisted (if applicable).

- Waitlisted registrants can be added to the ST by selecting the “Add” option next to the name in the list



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- The Export option creates a csv file to download and/or print

<u>Manually add Registration</u>:

Training organizations can add registrants manually using the name and OPIN of the registrant.

- In the Registrations tab, type in the name or OPIN (preferred) in the Registrations box
- Select the professional to be registered
- Select Add Registrant and their name will be added to the list of registrants
- Update the session details

<u>Verify Attendance</u>

After the scheduled event has been conducted, which is based on the date of the session listed in the ST, the training organization can mark attendance for each registrant that successfully completed the training.

- Access the training organization dashboard (instructions on page 2 of this guide)
- Select the Scheduled Events tab
- Find the Scheduled Event (ST) in the list and click on the three dots (...) under the Actions column on the far right to open the menu
- Select Edit
- Scroll down to the Session Details section
- Click on the three dots (...) under the Actions column to open a menu of options
- Choose Verify Attendance

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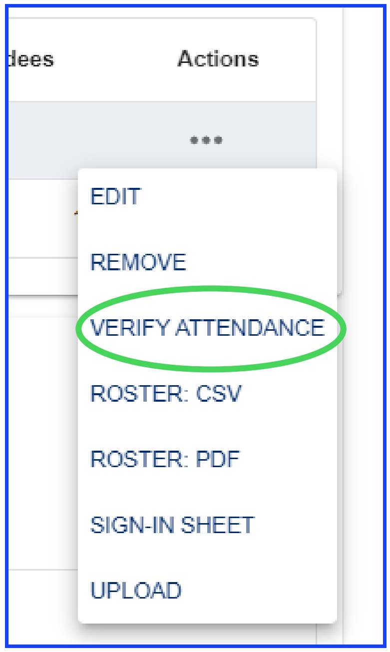

Last Name ↑	First Name	Opin	Attended	Date Attended
Contains	Contains	Contains		
Test	Mary Beth	11081527	☑	05/09/2025

Use any of the filters at the top of each column to narrow your search results.

Under the Attended column, click inside of the box to checkmark the attendance for each registrant that successfully completed the training. The credit will be automatically added to their OPR profile, and the date of the attendance will populate.

For Asynchronous (online self-paced) training attendance, please view the guidance document here.

After attendance is verified, choose “Completed” at the bottom of the ST. This closes the ST and no further edits/revisions can be made.

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Reactivate Event – STs that have been completed can be reactivated if additional attendance needs to be verified. This option is located at the bottom of the ST.

Troubleshooting tips

Format type not listed – only the format types listed in the approved PD Event (AT) can be selected.

Session too short error message – the session times must be equal to or longer than the time frame of the approved PD Event (AT), revise the time in the ST.

Instructor not listed – only approved instructors that have been added to the original AT can be selected. View the PD Event guide for guidance on adding instructors.

Registration dates – the system will default to today's date as trainings must be scheduled on or before the date they are conducted; backdating an event is not permitted. The Registration Deadline defaults to the day before the session date; any date before the first session and after the Registration Opens date can be selected.

Asynchronous (online self-paced) training scheduling– see that guidance here.

Contact support@occrra.org with questions.