Training Event Roster

develop

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The Minnesota Quality Improvement & Registry Tool
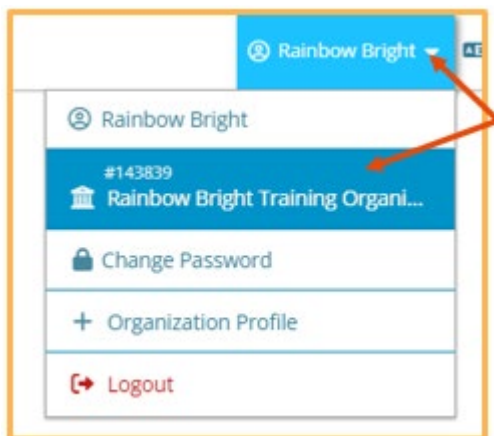
Training Event Roster

The following enhancements made to the Event roster:

- Performance improvement to be more user friendly - Added list paging to improve load time, especially for large rosters. For example, a roster that contains 100 attendees, the first page will load the first 25 attendees. The following pages will display the next set of 25 attendees. The purpose is to draw the reviewer's attention to one page at a time. This improves accuracy when trying to verify attendees.

- Added a search field on the Active Roster to search Develop ID, name or email address. This is to help improve rosters with many attendees.

- Registration date will be collected and displayed in training rosters

- Total number of registrants and total number of verified attendees will display on training event details

LOCATE THE TRAINING EVENT ROSTER

Follow the instructions below to locate the roster for an Event.

1. Log into Develop.

2. In the context menu in the upper, right-hand corner of the screen, select the **Organization Profile**.
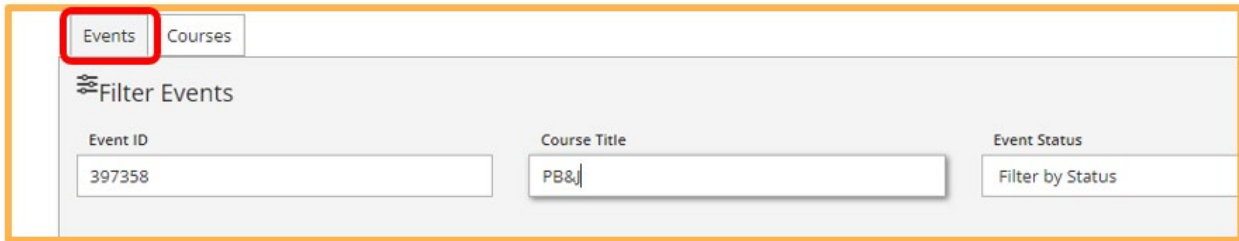

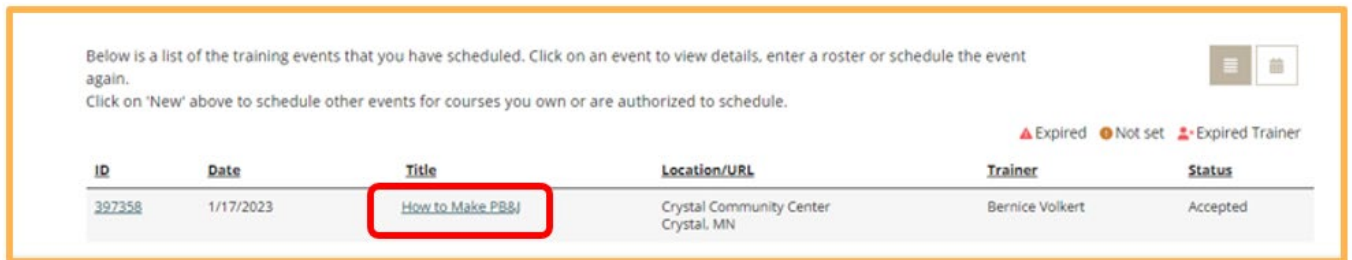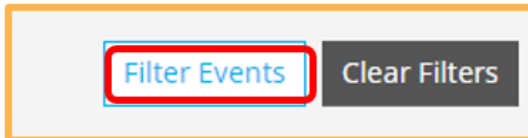3. In the left-hand navigation menu, select **Training Entry**.
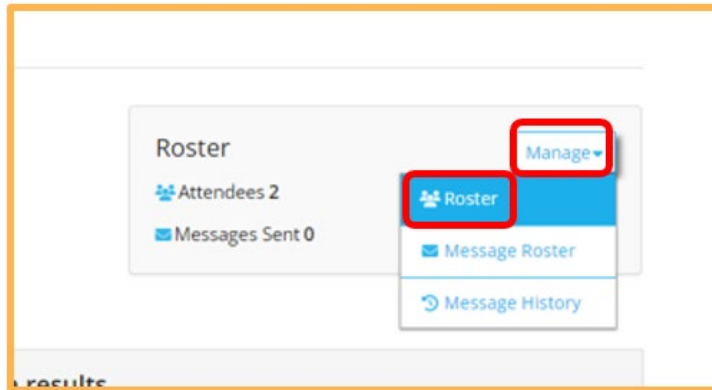
Training Event Roster

4. Click on the **Events** tab. Enter in the **Event ID** or the **Course Title**.

5. Select **Filter Events.** The Event will display in the list below. Click on the Event to view details.

6. Click on the **Manage** button and select **Roster**.

7. Displayed on this page is the active roster list of attendees.

Note: Attendees who registered through an online registration process for an Event through the Develop system will appear pre-populated in this roster. If Event did not use an online registration process through the Develop system attendees will need to be added manually.

MANAGING THE ROSTER

Some Events use the online registration directly in the Develop system. Other Events use an online registration process, but outside of the Develop system (such as through Zoom or another online platform). The active roster page will look slightly different, with additional features, if the Event used the Develop system online registration. Events that used the Develop system online registration will have a pre-populated attendee roster.
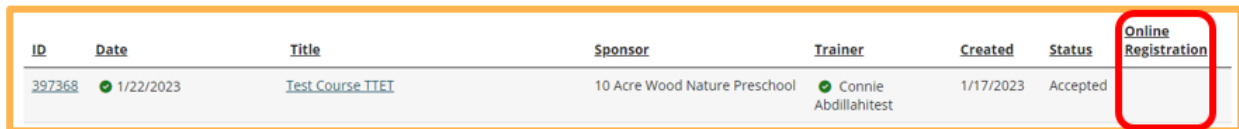
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To know if the Event used the Develop online registration, look for a green dot with a check mark in the Online Registration column next to the Event title. The active roster list of attendees will pre-populate.

If there is no green dot with a check mark, that means the Event did not use the Develop online registration. The active roster list of attendees would not pre-populate. Attendees will need to be added manually.

Below are sections on to manage the roster. Follow the instructions for each section.

- How to add an attendee

- How to edit and remove an attendee

- Verifying attendees (for events with and without online registration through the Develop system)

- Un-verifying attendees

- How to search the Active Roster

- Printing the training event roster
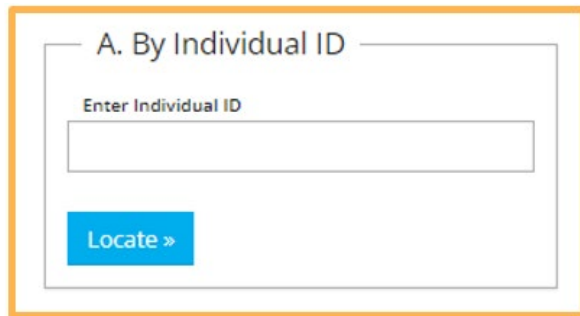
HOW TO ADD AN ATTENDEE

There are two methods to add an attendee to the roster. The best way to add an attendee is to use the Develop Individual ID number if known. This makes sure that the correct attendee gets the credit for attending the event.

Method 1 – Locate the attendee's account in Develop using one of the three search functionalities by:

- Individual ID – Search using the attendee's Develop ID (highly recommended way to add an attendee if ID is known)

A. By Individual ID

Enter Individual ID

[ ]

Locate »

- SSN/PIN and Birth date – Search using the attendee's last five digits of the Social Security Number or PIN. Search using the attendee's birth date.
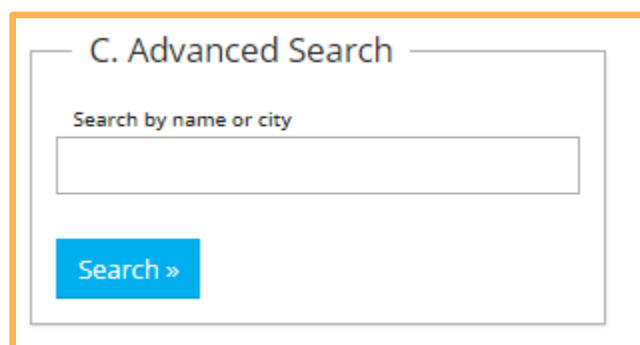
B. By SSN/PIN and Birth Date

Last 5 Digits of SSN/PIN

[ ]

Birth Date

[▾] [▾] , [▾]

Locate »

- Advanced Search – Search using the attendee's name or city

C. Advanced Search

Search by name or city

[ ]

Search »

Method 2 – Enter an attendee by name only (individuals who took an event in Develop, but do not have a Develop account) **or** create a new individual Develop account for the attendee.

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Note: If entered by name only, the attendee will not receive credit for this training.

Add an attendee by name only or create a new individual Develop account. *NOTE:* **If entered by name only the attendee will not receive credit for this training.**

Enter By Name »

1. Register attendee by creating a new Develop account

   a. The check box for Create Individual Develop Account is automatically checked. If not, make sure this box is checked.

Create Account

Create an individual Develop account to give the attendee credit for the training in Develop.
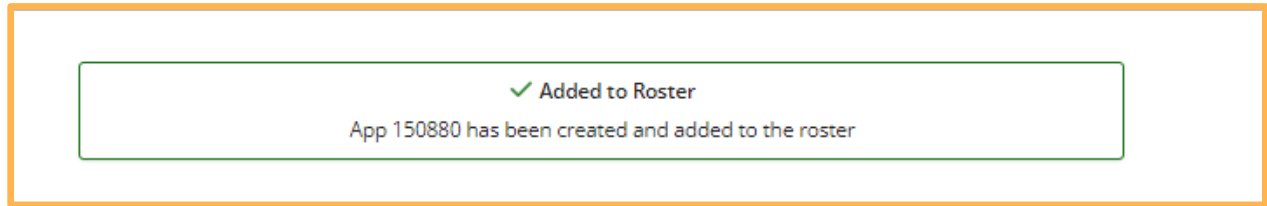
☑ Create Individual Develop Account

b. Fill in the required fields on this page.
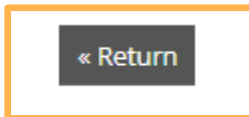

c. Click on **Complete Registration**. A message will display stating that attendee was added to roster with new app ID.
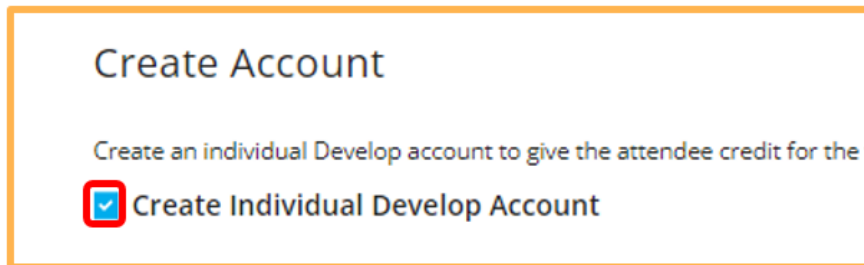
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> ✓ Added to Roster
> App 150880 has been created and added to the roster

       d. Click Return to return back to roster list.

« Return

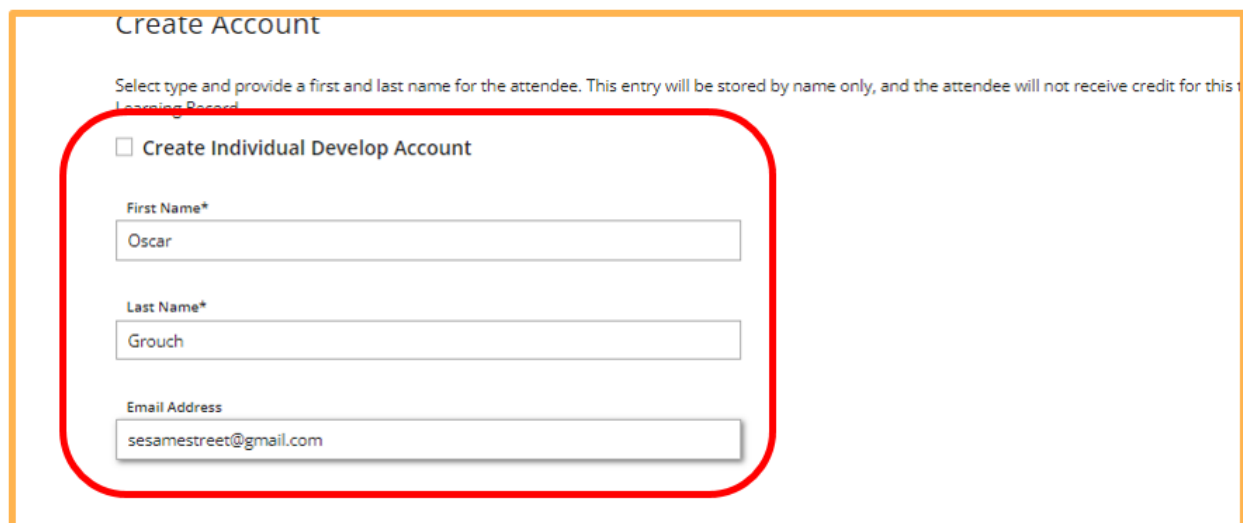2. Register attendee only by name

       a. Uncheck the Create Individual Develop Account check box.

Create Account

Create an individual Develop account to give the attendee credit for the t

☑ Create Individual Develop Account

       b. A new screen will display. Enter in the attendee's first name, last name and email address.

Create Account

Select type and provide a first and last name for the attendee. This entry will be stored by name only, and the attendee will not receive credit for this

☐ Create Individual Develop Account

First Name*
Oscar

Last Name*
Grouch

Email Address
sesamestreet@gmail.com

       c. Click on **Complete Registration**. A message will display stating that attendee was added to roster with new app ID.

Complete Registration

✓ Added to Roster

App 150880 has been created and added to the roster
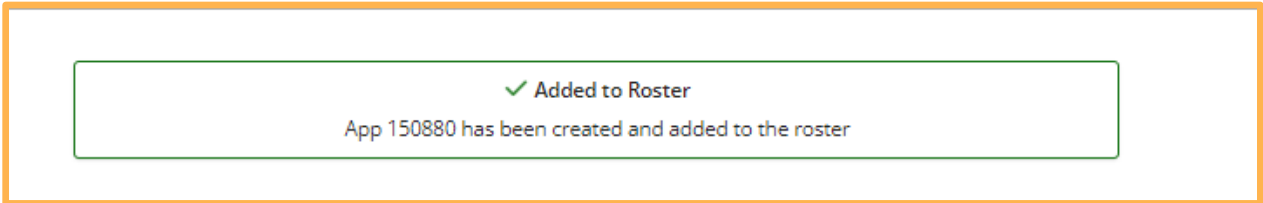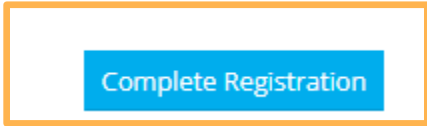
d. Click Return to return back to roster list.

« Return
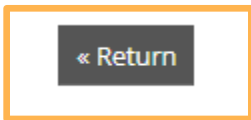
HOW TO EDIT AND REMOVE AN ATTENDEE

Attendees on the roster can be edited individually.

Note: The list on the page will display with the first top 25

1. To edit an attendee on the roster, click on the pencil icon to the far right of the attendee's name.


Individual ID	Address	Phone	
132879	Alitest, Bradley	(763) 482-2100	✎
	605 SELMSER AVE		
	Brainerd, MN 55720-2035		

2. To remove an attendee from the Roster list completely, click on the trash icon to the far right of the attendee's name.

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3. A pop up window will display asking to confirm the removal of the attendee. Click, yes, for removal. The attendee will no longer display on the roster list.
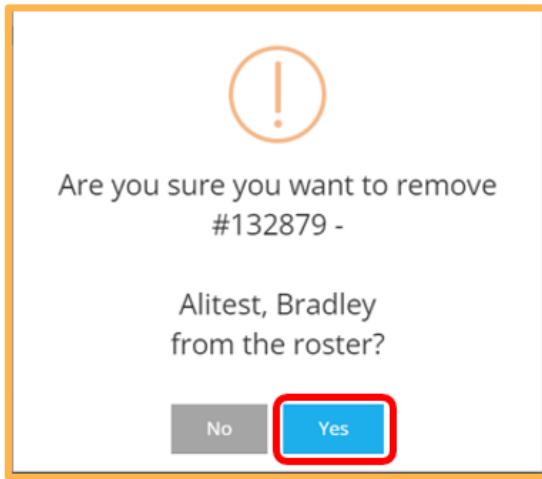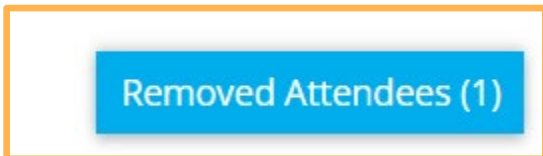

REMOVED ATTENDEES LIST

When an attendee is removed from the Roster list it will show up in the **Removed Attendees** list. A quick count of this list is displayed on the top right of the Active Roster.
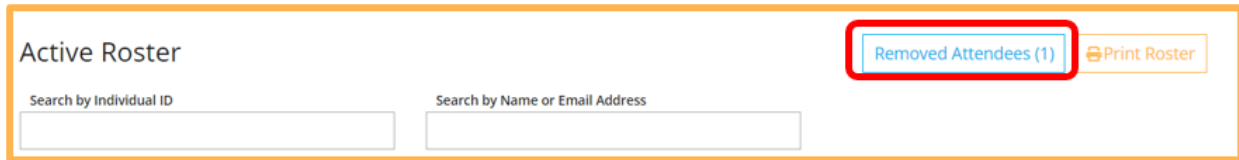
1. To view the list, click on the **Removed Attendees** quick count.

2. A list will display with the removed attendee/s displaying the following:

   - Individual ID
   - Name/Address
   - Removed by
   - Removed on date
   - Reason

3. Use the search boxes on this page to find the removed attendee. This helpful when the list is long on this page.

VERIFYING ATTENDEES

For events without online registration through the Develop system

Verifying an attendee is adding an attendee to the active roster. See the "How to add an attendee" section of this document. When adding attendees the **Attended this Event** box is automatically checked.

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## For events with online registration through the Develop system

By default, for registered Events that use an online registration process through the Develop system, the attendees will show up pre-populated on the roster.

An Event that has a large roster of attendees is displayed as set of pages on the screen. For example, an event that has over 100 attendees will display the first 25 attendees on one page. Page through to see the next set of attendees. The purpose is to draw the reviewer's attention to one page at a time. This improves accuracy when trying to verify attendees.

1. Locate the Event roster. (See step 6 of "Locate the training event roster" of this document)

2. On the Training Event page, the Roster displays the number of attendees and the number verified.

    a. Attendees: The total number attendees that registered.

    b. Verified: The total number of verified attendees that registered.
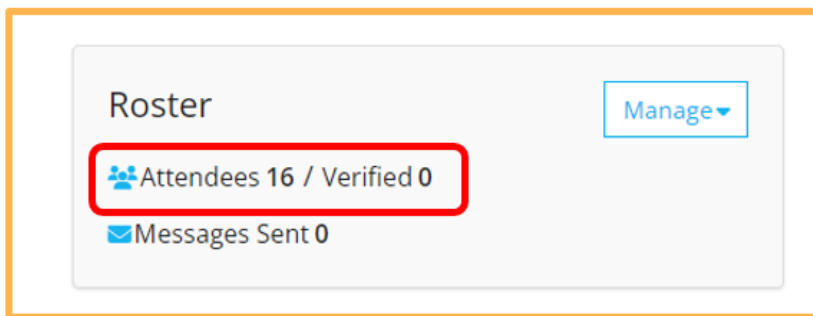
3. Click **Manage** and Select **Roster** from the drop down list.
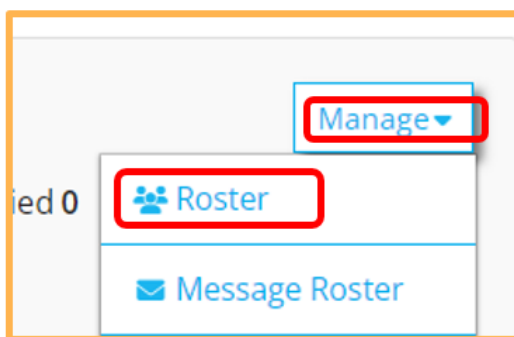
4. The columns and icons on the Active Roster page are:

    a. Individual ID – Develop ID

    b. Name and Address – Name and address of the attendee

    c. Phone number – Attendee phone number

    d. Registered – A greyed out check mark appears in this column indicating the attendee registered online through Develop

    e. Paid – The status of payment

        i. Enter payment – Enter payment details for the attendee. The dollar amount and payment from can be edited. Payment can be waived or submitted. Once completed a receipt can be emailed to the email provided here.

        ii. Paid – Displays the payment information

    f. Attended – A greyed out check mark appears in this column indicating the attendee attended the event.

    g. Icons

        i. - Need to verify attendance. Once that attendance is verified this icon will go away.

        ii. - To edit that the attendee information. (See the "How to edit and remove an attendee" section of the document)

        iii. - To delete the attendee and information. (See the "How to edit and remove an attendee" section of the document)

5. To verify one attendee at a time, click on the pencil icon.

Click the **Attended this Event** check box and click **Save Changes**.

Training Event Roster
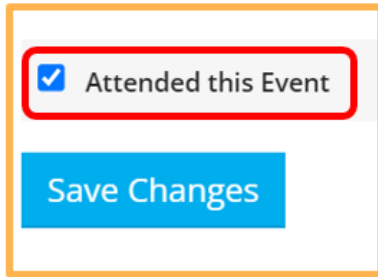
6. To view and verify **all** attendees at the same time.

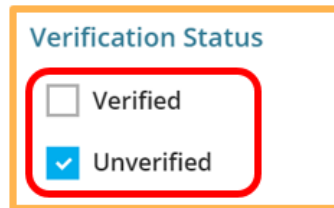   a. Click on the **Verify Attendees** button.

   b. Filter Applications – The list of attendees can be filtered by:

      i. Registrant Name – Attendee name

      ii. Individual ID – Develop ID

      iii. Email – Email address used to register for the Event
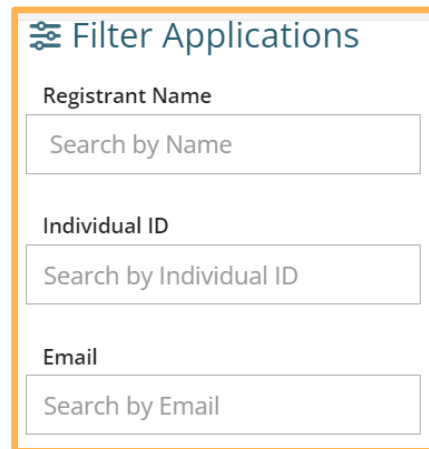
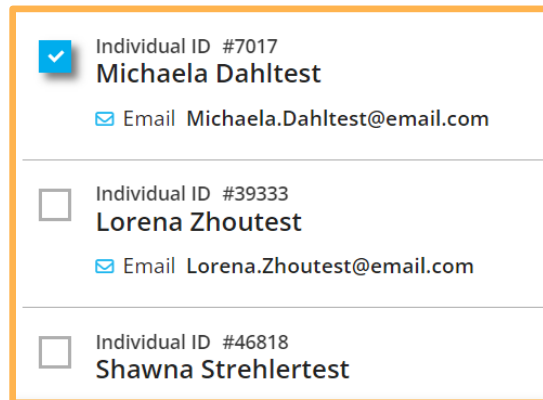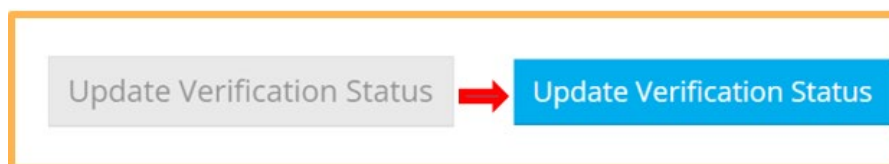iv. Verification Status – The list can be filtered by Verified or Unverified attendees.

c. After careful review, select the attendee/s on the page.

d. The **Update Verification Status** button will turn blue when attendee/s are selected on the page.

If all attendees are not displayed on one page to choose from, (only displays 25 attendees at a time) click on the next page to view the next set of attendees.

e. The **Select All** option can be used if all attendees shown on this page is verified and correct. To verify the next set of attendees click on the next page to see the new set of attendees.

The purpose is to draw the reviewer's attention to one page at a time. This improves accuracy when trying to verify attendees.

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f. Click on Update Verification Status button.

g. A pop up screen will display the list of the attendees whose verification statuses will be updated.
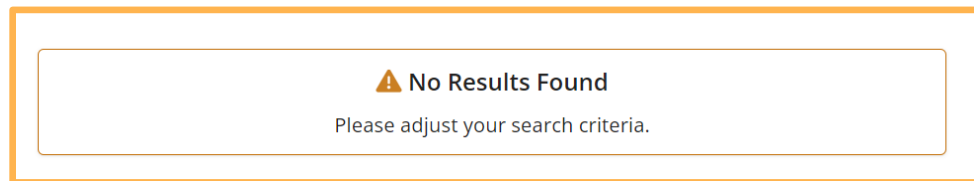

The following attendees verifications statuses are being updated:

Michaela Dahltest
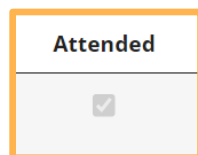
Lorena Zhoutest

Shawna Strehlertest
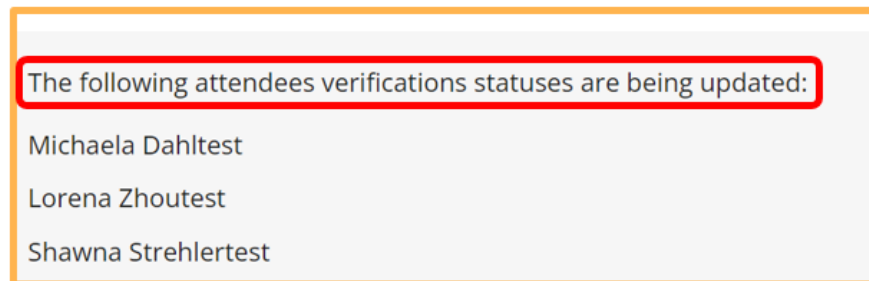
h. Click on **Update Status**.

i. Click **OK** button.
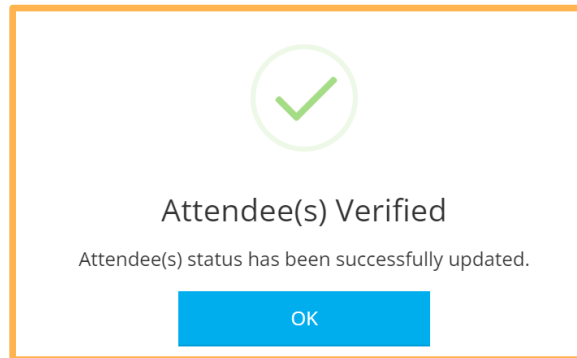
j. When the full list of attendees have been verified, there will be **No Results Found** on the page. Click **Back** button.
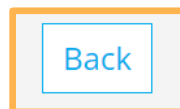
k. On the Active Roster page, a greyed out check mark appears in the **Attended** column indicating the attendee has been verified.

The icon with the orange arrows no longer shows on the page.

l. Complete verification and click Exit Roster.

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    m. On the Training Event page, the Roster is updated and displays the number of verified attendees.
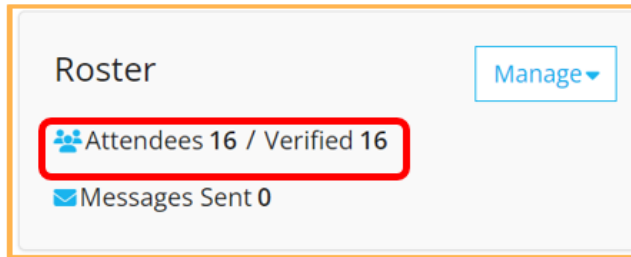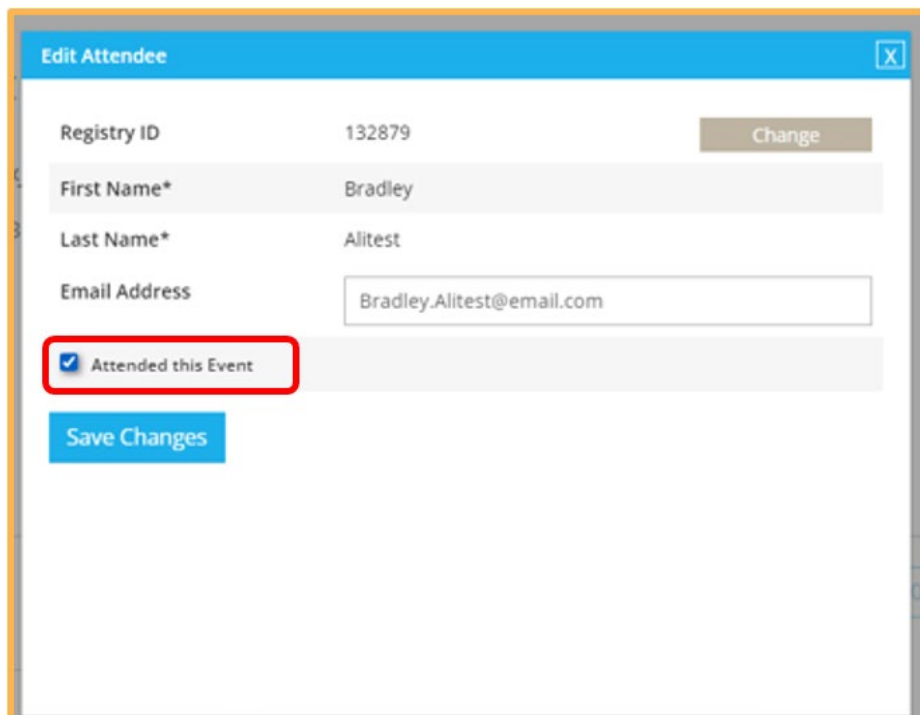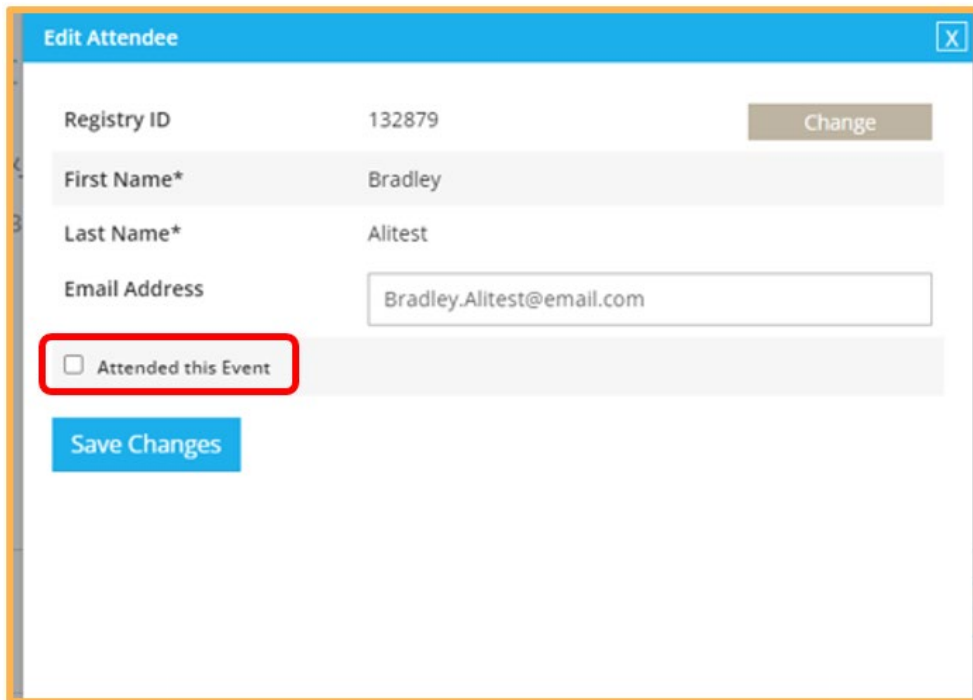
UN-VERIFYING ATTENDEES

1. Click on the pencil icon to the far right of the attendee's name.

2. Uncheck the **Attended this Event** check box. Unchecking the box means that the attendee will not receive credit for the Event, even though they registered.

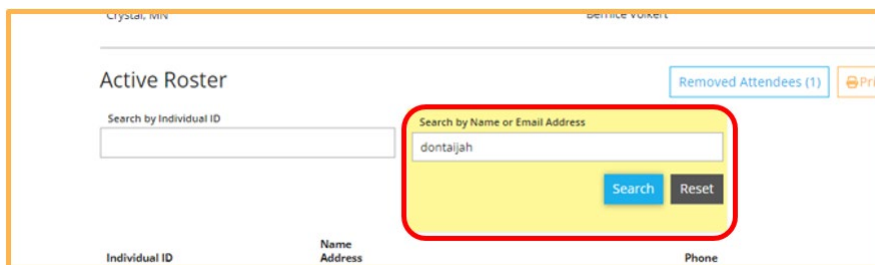3. Click on **Save Changes**.

    Note: The attendee will continue to display in the active roster list.
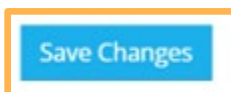
HOW TO SEARCH THE ACTIVE ROSTER

An Event may have many registered attendees. To locate a specific attendee in the roster, use the search boxes on this page. Search attendees by their Develop Individual ID, name, or email address.

1. Enter in the known Develop ID, First name or email address in the search box. In this example, enter in the first name and click **Search**.

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2. Results from the Active Roster will show on the page. This makes editing the attendee's registration and verifying their attendance more accessible.
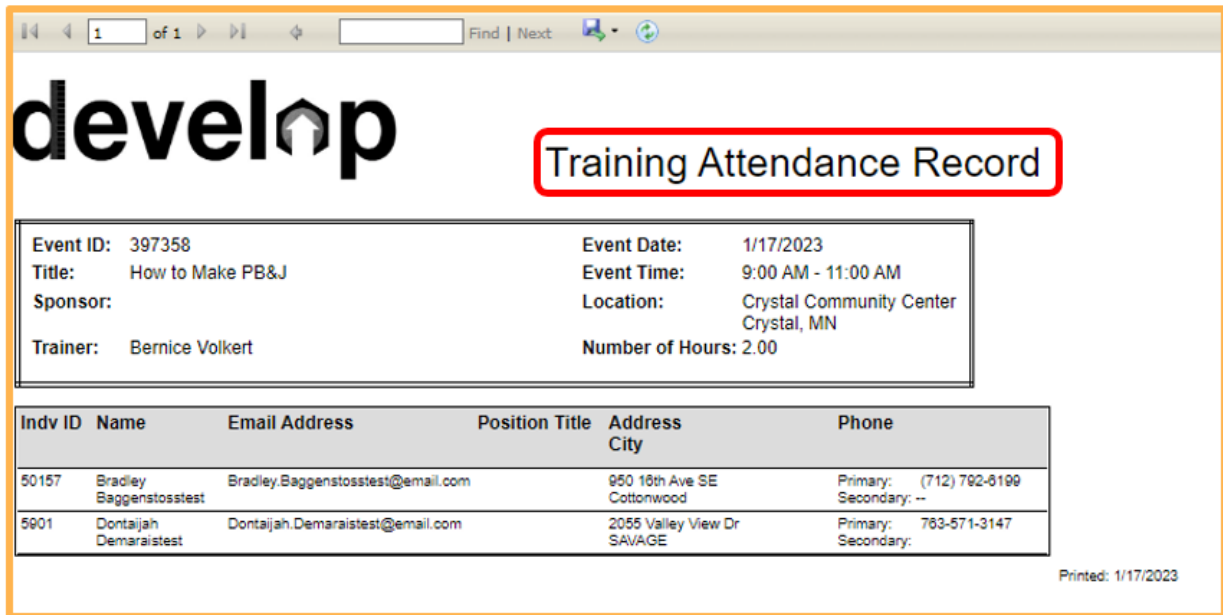

PRINTING THE TRAINING EVENT ROSTER

1. Locate the Event roster. (See step 6 of "Locate the training event roster" of this document)

2. Click **Manage** and Select **Roster** from the drop down list.

3. Click on the **Print Roster** button.

4. A new page will display with the **Training Attendance Record**.

5. The record can be printed. Select the format to print off the document.
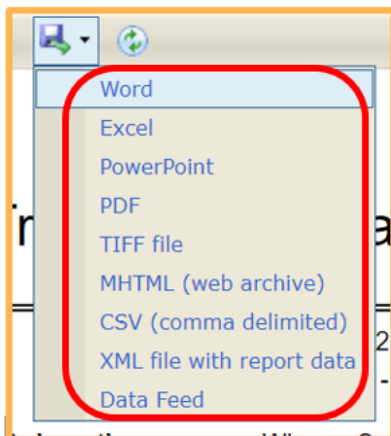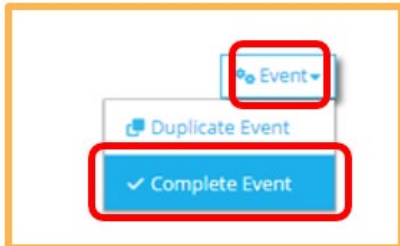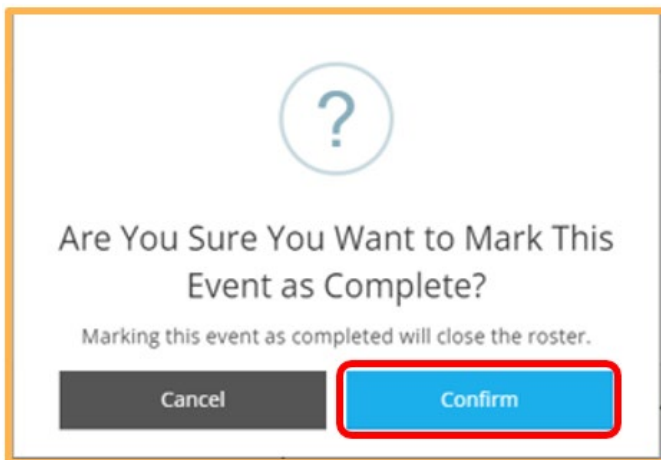
COMPLETING THE EVENT

When all attendance has been entered/recorded accurately, complete the Event.
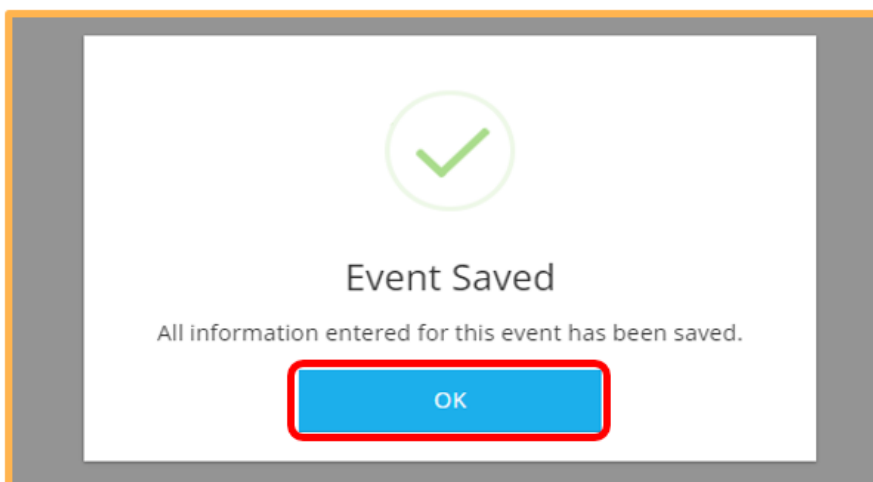
1. Click on the **Event.** Select the **Complete Event** from the drop down list.

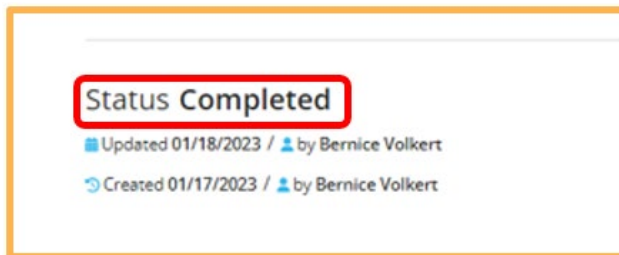2. A pop-up window will display asking for confirmation to complete the Training Event.

3. Click the **Confirm** button and a confirmation message will display that the Event has been saved.

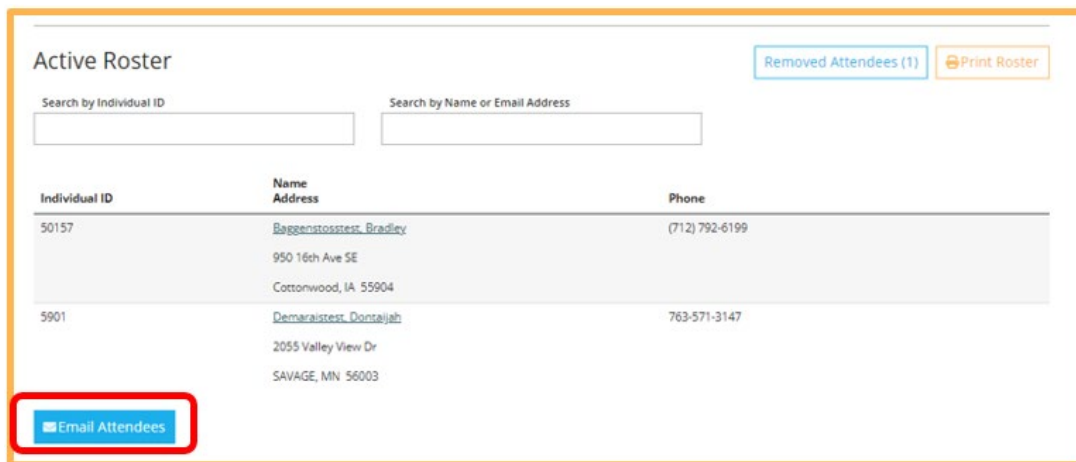4. The Training Event has a status of **Completed**.

   Once a Training Event has reached the Completed status, the roster can no longer be modified. All roster details remain for reference in Develop.

Status **Completed**

📅 Updated 01/18/2023 / 👤 by Bernice Volkert

🕘 Created 01/17/2023 / 👤 by Bernice Volkert

EMAIL ATTENDEES

Attendees on the Active Roster can be emailed at any time, including pre-event and post-event. This would be useful in cases where documents maybe distributed or electronic materials to given to attendees as a follow up. For example, a copy of DHS owned curriculum might be sent to individuals who successfully complete a Training of Trainers (TOT) for a particular curriculum.

1. Click on the **Email Attendees** button.

Active Roster

Search by Individual ID

Search by Name or Email Address

Individual ID	Name Address	Phone
50157	Baggenstosstest, Bradley	(712) 792-6199
	950 16th Ave SE	
	Cottonwood, IA 55904	
5901	Demaraistest, Dontaijah	763-571-3147
	2055 Valley View Dr	
	SAVAGE, MN 56003	

✉ Email Attendees

2. Fill in the communication content and attach files. Specific attendees can be selected to send communication to.

   For example, if an Event date and/or time changed, the location, cancelled or etc. the attendees on the roster can be emailed. This is also helpful to send training materials ahead of or after events.

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3. Click on the **Send** button to complete the action.
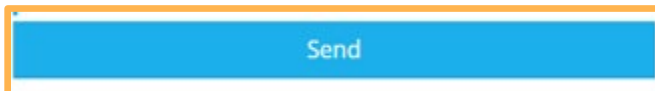
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The Minnesota Quality Improvement & Registry Tool

DEVELOP HELP DESK INFORMATION

The Develop help desk is available by phone Monday through Friday.

- Monday, Wednesday and Friday hours are from 8:00 a.m. to 5:00 p.m.

- Tuesday and Thursday hours are from 8:00 a.m. to 7:00 p.m.

- Call 844-605-6938 or email support@develophelp.zendesk.com

For assistance in Hmong, Somali or Spanish, contact the Language Access Line provided through Child Care Aware of Minnesota.

- Call 888-291-9611 **or** 651-655-0150

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