



Training Alignment Process (TAP)

How-to Guide: Managing Your Courses

Colorado Shines
Professional Development Information
System (PDIS)



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Introduction:

Congratulations! Your course has been recognized as aligned to The Colorado Competencies and meeting best practice standards for adult instruction. Your course will be posted in the Colorado Shines Professional Development Information System (PDIS) course catalog and may be seen by over 70,000 registered users.

Information:

This guide and other TAP resources may be found through the [Colorado Shines PDIS menu navigation](#), Apply for Training Alignment.

Please read through the following to understand the essentials of utilizing Colorado Shines PDIS for your course.

Options:

You have two options when it comes to managing your course. We hope one of these options best meets the needs of your organization.

1. **Setting Training Dates with Users Registering through Colorado Shines PDIS:** You may set specific training dates and open registration to all users in Colorado or within a specific node (by county, program, etc.). Your course is posted in the Colorado Shines PDIS course catalog and users register through the Colorado Shines PDIS. For this option, you need to enter scheduled event information before the actual event date and then mark registered users as having attended and completed the course within seven days after the event. Colorado Shines PDIS does not accept any type of registration fee or payment option. You will need to arrange for payment through another avenue if your course has a registration fee associated with it.
2. **Posting a Course Advertisement in Colorado Shines PDIS with Users Registering through Your Organization’s Site:** You may have an informational posting of your course in the Colorado Shines PDIS course catalog that indicates how users may contact you to arrange for an event with learners registering through your organization’s own system. You will need to enter scheduled event data, and mark learners as having attended and completed the course up to seven days after the event date into the Colorado Shines PDIS.

Marking Attendees as Having Completed a Course:

Both options require you to mark within the Colorado Shines PDIS all those who take your course as having attended and completed it within seven days after the event date. This allows the course to be linked to an attendee’s Colorado Shines PDIS account and automatically produces an online certificate of



completion for them. This process aides the document review for early childhood professional credentials. It also allows for tracking professional development and knowing where and how to allocate potential future funding.

Issuing Certificates:

It is preferred you do not issue separate certificates as this may cause duplication difficulties and processing delays for professional credentialing. If you do issue separate certificates, we ask that you include the following statement on them, *“If you are a registered user of Colorado Shines PDIS, please do not upload this certificate to the system. This course will be linked through your PDIS ID to your Colorado Shines PDIS account within seven days of the training date and automatically calculated into your professional credential.”* Please add *“Colorado Shines TAP – (insert Colorado Shines Course Number)”* after the course title on your certificate for courses that have gone through the Colorado Shines Training Alignment Process and have met all requirements. We ask that you also place the Colorado Shines Training Aligned logo on the certificate. Providing these statements and adding the logo will help reduce the number of duplicate certificates in Colorado Shines PDIS and lessen credentialing processing time. We appreciate your assistance with this matter. Please view [all certificate requirements](#) on Colorado Shines PDIS.

Job Embedded Coaching:

Please note you must be a credentialed coach through Colorado Shines PDIS to include job embedded coaching with at least 8 contact hours at the work site in addition to the time spent in training. Coaches need to provide the learner with a completed coaching verification letter with the exact same title as listed on the training certificate. Please view [all certificate requirements](#) on Colorado Shines PDIS.

Logo Use:

You will be emailed two Colorado Shines Training Aligned logos, a TIF file for use on paper completion certificates and a PNG file for use on your website. Including the logo on completion certificates assists the Colorado Shines PDIS help desk team with correctly processing professional development submissions and reducing delays. The logo may also be used in connection with the aligned course on your organization’s website. Please keep in mind that the specific course is recognized as aligned, not the organization.

Sign-In Sheets:

The sign-in sheet used for in-person training should include an attendee’s first and last name, their Colorado Shines PDIS unique ID/username (generally the email address used when they registered on the system), program name, and any other information that you may need for your records. Having this information will help you to search for users in the Colorado Shines PDIS, if needed, and help you to mark users as attended and completed for the course. Please keep physical sign-in sheets or electronic sign-ins for one year from the event date in case you need to reference this information.



Users Not Registered on Colorado Shines PDIS:

Not all learners who take your course may be registered on Colorado Shines PDIS. We encourage those in the early childhood field to register on Colorado Shines PDIS. You may consider asking learners to indicate if they are registered on Colorado Shines PDIS on your sign-in sheet. This will help you know who to mark as attended and completed in Colorado Shines PDIS after the training event takes place.

How Users Register for Courses on Colorado Shines PDIS:

Information on how users register for a course on Colorado Shines PDIS is included in this document. We encourage users to call the Colorado Shines PDIS Help Desk at 1.844.447.4441, option 2 if they need any assistance.

Permissions and Having Access to Colorado Shines PDIS:

Anyone who will be marking learners as having attended and completed a course or entering scheduled event information, must have permissions to do so on Colorado Shines PDIS. Permissions will be given to those who have taken the [PDIS Security Training](#). This training provides instruction on how to handle personally identifiable information and data in a confidential manner. The course requires viewing the U.S. Department of Education Family Educational Rights and Privacy Act Awareness training and completing the Data Sharing and Confidentiality Assurances Agreement. The PDIS Security Course will lead you through the requirements. Permissions will be assigned to you, through your Colorado Shines PDIS account, once you have completed the course. The training alignment coordinator will notify you via email once you are granted permissions.

You will notice a new menu option on your Colorado Shines PDIS account when you have been given permissions. The permissions will allow you to access ***Manage Learning – Manage Scheduled Events***. This area will allow you to enter event dates and mark learners as having attended and completed a course.

Getting Started:

- You must be a registered user in the Colorado Shines PDIS. Your email address is your username in the system. Go to <https://ecpd.costartstrong.org/ets/login.aspx>.
- The site works best with Google Chrome as the browser.
- You, and anyone who will be marking learners as having attended and completed a course or entering schedule event information, must have permissions set to do so on Colorado Shines PDIS.
- Determine if you will be using Option 1 or Option 2. Follow the steps below corresponding to the option you will be using.
- The screen shots provided throughout this guide may look slightly different than those on your screen due to the level of administrative permissions you have been given.



Steps for Option 1: Setting Training Dates with Users Registering through Colorado Shines PDIS

Step 1 – Adding Instructors to the Colorado Shines PDIS

If you would like to list instructors with specific event dates, please send a list of instructors to the training alignment coordinator. Contact information is located on the Apply for Training Alignment main menu navigation of Colorado Shines PDIS. The instructors will be added to the system and may be accessed through a dropdown menu when scheduling events. You are not required to list an instructor for your events.

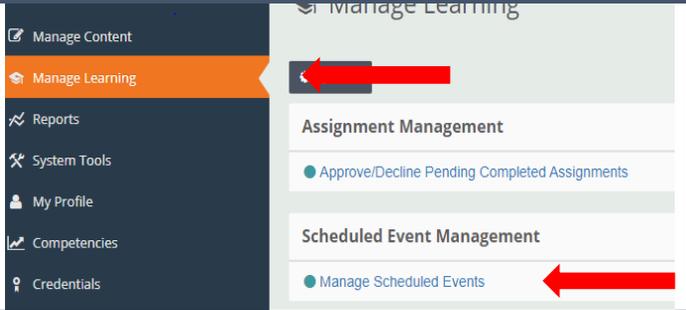
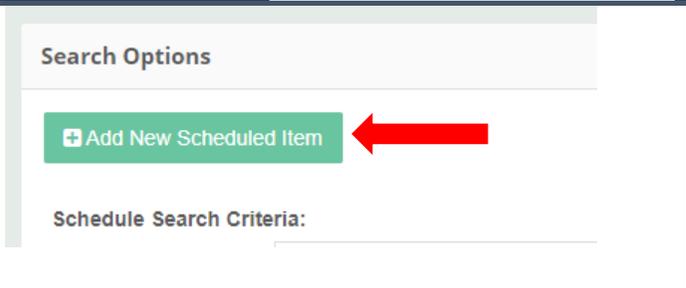
Step 2 - Adding a Course Location to the Colorado Shines PDIS

Please contact the training alignment coordinator to add event locations to Colorado Shines PDIS. The locations will be added and may be accessed through a dropdown menu when scheduling events. Contact information is located on the Apply for Training Alignment main menu navigation of Colorado Shines PDIS.

Step 3 - Adding and Managing a Course Event

Now that the course location is listed in the Colorado Shines PDIS, you may start managing scheduled event dates and providing logistical details. Listing an upcoming event will ensure your course remains visible in the course catalog.

Please remember to select Save & Exit before leaving the Schedule Configuration page. You may select Save Schedule at any time to save your work.

| | |
|--|---|
| <p>1. Go to Manage Learning on the main menu and then select Manage Scheduled Events</p> |  <p>The screenshot shows a dark sidebar menu with 'Manage Learning' highlighted in orange. A red arrow points to this menu item. To the right, the 'Manage Learning' page is visible, with a red arrow pointing to the 'Manage Scheduled Events' link under the 'Scheduled Event Management' section.</p> |
| <p>2. Select Add New Scheduled Item Select this option whenever you want to add a new event date for your course.</p> |  <p>The screenshot shows a 'Search Options' section with a green button labeled 'Add New Scheduled Item'. A red arrow points to this button. Below the button is a 'Schedule Search Criteria:' label followed by a text input field.</p> |

3. Schedule Configuration

- A. **Course:** Enter the first word or two of your course name. Select your course from the drop-down menu that appears.
- B. **Scheduled Event:** Click on the small black arrow for a dropdown menu. Select your course name.

4. Schedule Configuration Continued

- A. **Class Capacity:** Default is set to Unlimited. Click Limited and enter number of participants in the box if you wish to limit the number of participants. This works best by scrolling with the arrows.
- B. **Overbook:** Allow an unlimited or specific number of participants over the indicated capacity by selecting one option and entering a number in the box if needed. Default is None and event registration will close once capacity enrollment is reached. This works best by scrolling with the arrows.
- C. **Waiting List:** Allow an unlimited or specific number of participants to be included on a waiting list by selecting one option and entering a number in the box if needed. This works best by scrolling with the arrows. Default is None and no waiting list will be created. Check **Auto Enroll From Wait List** to have the system automatically fill openings when they occur.
- D. **Automated Registration E-mails:** Default is enabled. Please leave at default. Participants will receive an automated e-mail stating they have registered for the course.

5. Scheduled Configuration Continued

- A. **Event Identifier:** Allows identifying an event name such as conference or district event.
- B. **Event Topic:** Each event is a distinct event and may be identified in a special way here such as with a series course that has a different topic each week.

- C. **Instructor:** Use the dropdown menu to select the instructor. This is not required. See Step 1 – Adding Instructors if the instructor is not listed.
- D. Click **Add Instructor:** Instructor’s name will appear in the text box below. To remove an instructor, click on their name in the text box and then click on the x to the right of the text box.

A Event Identifier:

B Event Topic:

C Instructor: ▼

D

X

6. Scheduled Configuration Continued

- A. **Location:** Click on the small black arrow for the dropdown menu and select your location. If your location is not listed, you will need to follow Step 2 – Adding a Course Location. Click on the x in the red box to the right of the dropdown box to remove a location.
- B. **Classroom:** Click on the small black arrow for the dropdown menu and select the classroom if needed. Click on the x in the red box to the right of the dropdown box to remove a classroom.
- C. **Show/Hide Resources Options:** This option is currently not in use. Please leave at default option.

Location and Resource Options:

A Location: ▼

B Classroom: ▼

C [Show/Hide Resource Options](#)



7. Specify Time and Dates

Scroll Up to the calendar area located on the right-hand side of the screen.

- A. **Time Zone:** Please select your time zone. Currently set at Mountain Standard Time for default.
- B. **Class Time:** Please select the start time for your course by clicking on the small clock to the left and then clicking on the start time. Please select the end time for your course by clicking on the small clock to the right and clicking on the end time.
- C. **Dates:** Please click on the date of your event. You may scroll through the calendar by selecting a small black arrow to either the left or right of the month and year listed at the top of the calendar. The date you select will populate the text box below the calendar under **Current Schedule Information**. Click on the date in the calendar if you wish to remove a date.

Please Specify the Time and Date(s) for this Scheduled Event:

A * Time Zone: Mountain Standard Time

B * Class Time: 8:00 AM to 5:00 PM

Day(s) highlighted indicate unavailable selection(s) for that date/time:

Classroom Unavailable Instructor Unavailable Both Unavailable

May 2019

| S | C | M | T | W | T | F | S |
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| > | 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| > | 12 | 13 | 14 | 15 | 16 | 17 | 18 |
| > | 19 | 20 | 21 | 22 | 23 | 24 | 25 |
| > | 26 | 27 | 28 | 29 | 30 | 31 | |
| > | | | | | | | |

Current Schedule Information:

Full listing of selected schedule:

There are currently no dates selected. ←

8. Registration Settings

- A. **Registration Status:** Default is set to Registration Open. Please leave on default.
- B. **Registration Type:** Default is set to **Open Registration** with the only restriction being configured capacity. Select **More Options** to see your choices and select the one that meets your needs. See Registration Types, page 23, to learn more about registration types and payment options.
- C. **Open Registration Starts and Open Registration Ends:** Click on the small calendars to the right of the text boxes to select registration start and end dates. Times are default to midnight, but you may change the registration times if you wish.
- D. **Registration Restriction:** Default is set to Available to Everyone. If you need to restrict registration by county, school, etc., select **More/Less Options**, choose **Restricted by Hierarchy Node**, and select the appropriate node. This works best if you type in the county name or organization name and then chose from the drop-down menu. All uppercase, no punctuation.

The screenshot shows the 'Registration Settings' form. Annotation A points to the 'Registration Status' dropdown menu, which is set to 'Registration Open'. Annotation B points to the 'Registration Type' section, where 'Open Registration' is selected. Below it, the 'Less Options' section is visible, with 'Open Registration, Requires Approval' and 'Managed' options. Annotation C points to the 'Open Registration Starts' and 'Open Registration Ends' date pickers, which are set to 5/27/2019 12:00 AM and 5/31/2019 12:00 AM respectively. Annotation D points to the 'Registration Restriction' section, where 'Available to Everyone' is selected. Below it, the 'Less Options...' section is visible, with 'Restricted by Hierarchy Node' selected and 'Colorado' entered in the search field.

9. Collaboration Settings

- A. **Enabled Options:** We are currently not supporting these options for outside vendors. Please do not select these options.

The screenshot shows the 'Collaboration Settings' form. Under the 'Enabled Options' section, there are two checkboxes: 'Enable Forum' and 'Enable Chat', both of which are currently unchecked.

10. Event Contact Information

Enter in the first and last name of the contact for this course, their e-mail address, and best phone number. This is an appropriate place to enter the instructor's or event organizer's information.

The screenshot shows the 'Event Contact Information' form. It contains three input fields: 'Contact Name', 'E-mail Address', and 'Phone Number', all of which are currently empty.

11. Event Sponsor Settings

Select the appropriate sponsor if necessary. Default is set to No Sponsor. You may enter a sponsor if you choose Custom Sponsor. **Funding Stream** is set to default.

The screenshot shows the 'Event Sponsor Settings' form. Under the 'Sponsor Details' section, 'No Sponsor' is selected. Below it, there are two other options: 'Organizational Hierarchy Sponsor' and 'Custom Sponsor', both of which are unselected. The 'Funding Stream' dropdown menu is set to '- None of These -'.

12. Syllabus (optional)

Please cut and copy or enter in a syllabus if desired. This may be viewed by users when they register for the event or when they view course information in My Courses. This is a good place to enter payment information if needed.



13. Save Schedule

Please remember to select **Save & Exit** before leaving this page. You may select **Save Schedule** at any time to save your work.

Please view your course and event date in the course catalog. Please notify the training alignment coordinator if changes need to be made to the course description or if you need any assistance.

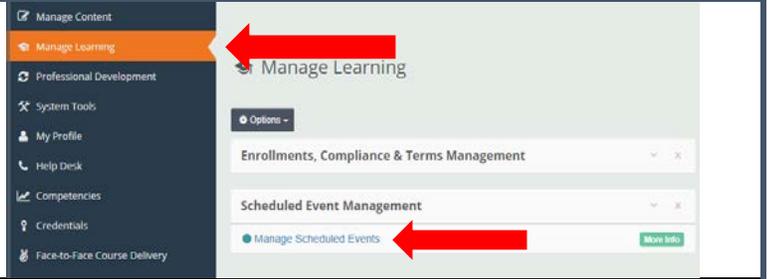


Step 4 - Editing Events and Managing Registrations – Includes Marking Learners as Having Attended and Completed the Course

Now that you have entered specific event dates into the system, you may edit the details of those events, view registrations, and manage registrations. Learners will be registering for your course through the Colorado Shines PDIS; however, you may manage registrations by adding or deleting registrants, and marking registrants as having attended and completed the course. See Registration Types, page 23, to learn more about registration types and payment options.

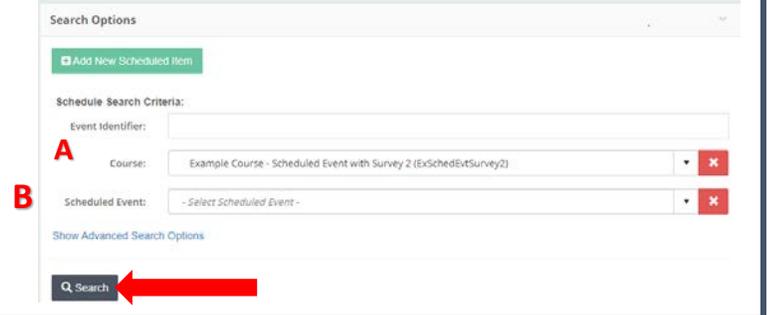
1. Manage Learning

Select **Manage Learning** from main menu after logging-in. Then select **Manage Scheduled Events**.



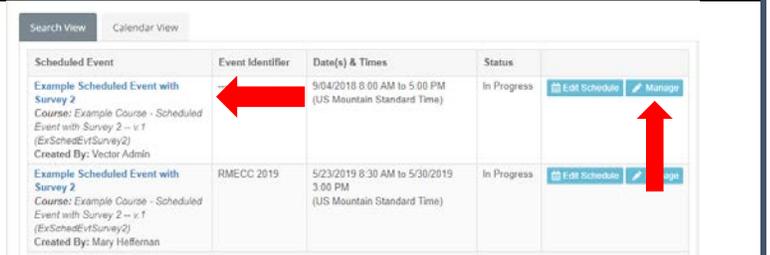
2. Manage Scheduled Events – Search Options

- A. **Course:** Type the course name in the text box or search for your course using the drop down menu and select your course
- B. **Scheduled Event:** Select the **Scheduled Event** text box and using the dropdown menu, select the scheduled event you'd like to view, generally the same name as your course. Click on **Search**.



3. Scheduled Event – Managing Registrants and Editing Events

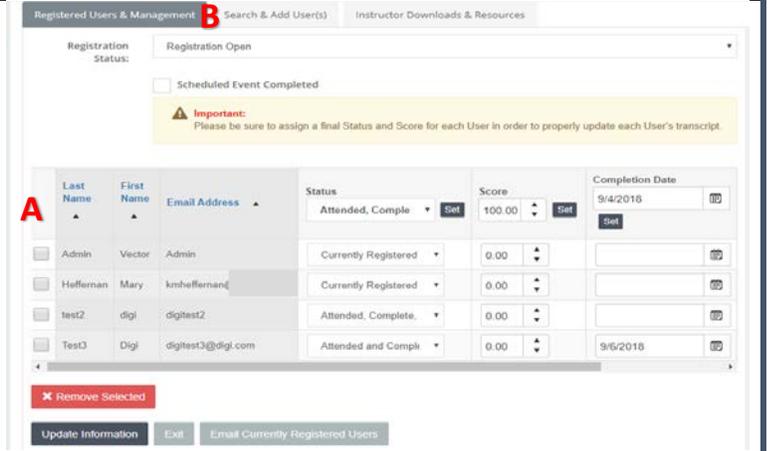
Click on the **name of the course** to enter into Manage Event or you may select the blue **Manage** button to the right. This lets you view and manage the registered users for this particular event of your course. The blue **Edit** button to the right allows you to enter into the event and make changes to the date, time, capacity, location, etc. Please be sure to **Save Schedule** if you make any changes. **Note event dates before selecting the course name if you have multiple events listed.**



4. Scheduled Item Options – Viewing Registered Users, Removing and Adding Registrants

You will see a list of those who are registered for your course.

- A. To **remove a registrant**, select the box to the left of the person's name to highlight the row. Then click on the red **Remove Selected** box below the list. Then select **Update Information**.
- B. To **add a participant**, click on the **Search & Add User(s)** tab.



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5. Scheduled Item Options – Adding Registrants

- Enter the user's first and last name. Click on **Search**.
- User's name appears under Search button. Highlight the person's name by **clicking on the box** that is to the left of their name. Click on **Add Selected User(s)** box. You will see a spinning blue circle while the system processes your request. Click on Registered Users & Management tab to confirm user has been registered. You may also search by Unique ID which is the user's email address.

Registered Users & Management Search & Add User(s) Instructor Downloads & Resources

Search Filters:
Hierarchy Node: Colorado
Begin typing to search for nodes.

First Name: Mary
Last Name: Hoffman
Unique ID:
Status: Active
Apply for Administrative User: Type here to begin searching...

Search

There are currently 21 spot(s) available for registration.

| Last Name | First Name | Unique ID | Registration Date |
|-------------------------------------|------------|-----------|--|
| <input checked="" type="checkbox"/> | Hoffman | Mary | kmhoffman@ (New Course Enrollment will be created) |

6. Scheduled Item Options – Managing Registrants' Status

 *In order for participants to receive course hours or credit for attending and participating in the course, course owners or those who are responsible for the event, must mark each participant as **Attended and Completed** within seven days of the course date. Please complete **Status, Score, and Completion Date**.*

- Click all boxes to the left of registrants' names. Locate the **Status** drop down box. Use the dropdown arrow and select **Attended and Completed**. Then click on **Set** to mark all registrants as Attended and Completed. You may also mark registrants individually by using the status drop down box in the same row as their name. For example, a participant may have attended the course but needed to leave early and therefore didn't complete the course. You would select **Attended but did not Complete**. Remember to select **Update Information** to save any changes.

Registered Users & Management Search & Add User(s) Instructor Downloads & Resources

Registration Status: Registration Open
Scheduled Event Completed

Important:
Please be sure to assign a final Status and Score for each User in order to properly update each User's transcript.

| Last Name | First Name | Email Address | Status | Score | Completion Date | |
|-------------------------------------|------------|---------------|----------------------|------------------|-----------------|-----------|
| <input checked="" type="checkbox"/> | Hoffman | Mary | kmhoffman@ | Attended and Con | 100.00 | 6/14/2019 |
| <input type="checkbox"/> | | | Currently Registered | 0.00 | | |

Remove Selected

Update Information Exit Email Currently Registered Users



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- B. **Score** Mark all participants as having 100% score. If a scored test was administered, you would enter individual scores earned.
- C. **Completion Date** Select all registrants. Click on **Set** under Completion Date to mark all attendees as having completed on the day of the event. You may also mark participants individually with another date if needed.
- D. Remember to select **Update Information** to save any changes.
- E. **Email Currently Registered Users** You may email registrants to remind them about the course, to let them know they have been marked as attended and completed, or to give them any other information about the course.

Step 5 – If View/Select Schedule Becomes Too Long in Registration Area

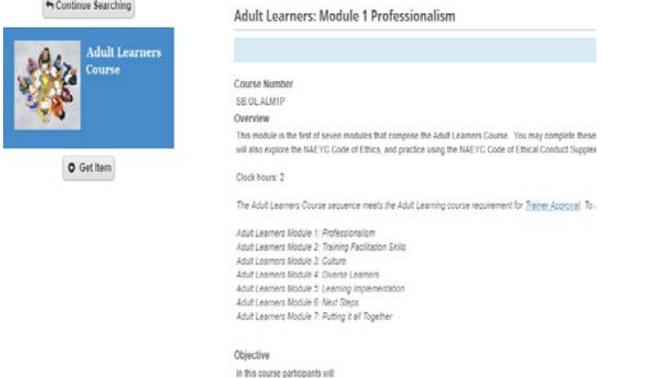
You may notice the View/Select Scheduled page linked through the Course Catalog and registration becomes very long once you have entered several event dates. You may go to **Manage Learning**, enter the course schedule, and mark **Registration Settings** as **Managed** after you have marked students as attended and complete for the event date. Or, you may change **Registration Open** to **Registration Closed**. The event will no longer be viewable. Keep in mind you need at least one active event for the course to be seen in the course catalog.

The screenshot shows the 'Registration Settings' form. At the top, there is a header 'Registration Settings' with a red arrow pointing to it. Below the header, there are two main sections: 'Registration Status' and 'Registration Type'. Under 'Registration Status', there is a radio button for 'Registration Open' with a blue arrow pointing to it. Under 'Registration Type', there are three radio button options: 'Open Registration', 'Open Registration, Requires Approval', and 'Managed'. The 'Managed' option is selected, indicated by a red arrow. Below these options, there are two text input fields: 'Open Registration Starts:' and 'Open Registration Ends:'. The 'Managed' option has a description: 'Users are not allowed to view or register for this scheduled event. Registration is Managed by an ac'.

Steps for Option 2: Posting a Training Advertisement in Colorado Shines PDIS with Users Registering through Your Organization’s Site

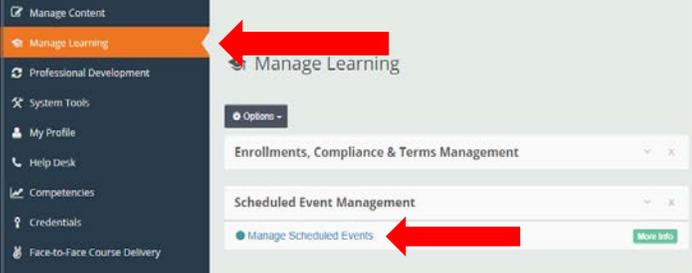
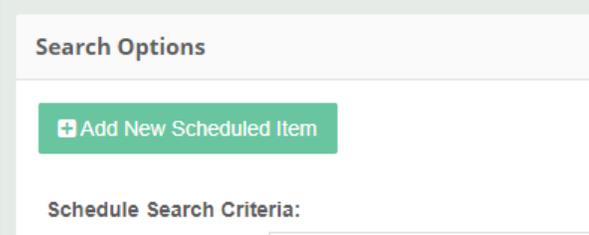
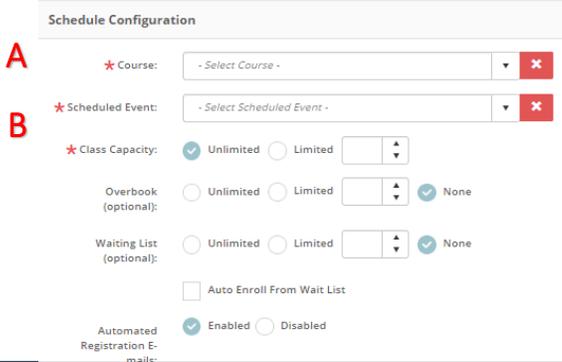
Step 1 – Review Your Course Advertisement

Your course is now visible in the Colorado Shines PDIS course catalog. Please login and view your course advertisement. Please make sure the hyperlink to your registration site is correct and working.

| | |
|--|--|
| <p>1.Course Catalog Log-in to https://ecpd.costartstrong.org/ets/home Select Course Catalog from the main navigation menu.</p> |  |
| <p>2.Find Your Course You may search by competency domain category, course type, or keyword. You may also scroll by using your mouse scroll wheel, by clicking and holding the scroll bar to the right, or by clicking the page arrows at the top and bottom.</p> |  |
| <p>3.View Course Please view your course for accuracy. Test the hyperlink to your registration site. Please notify the training alignment coordinator for changes. See Apply for Training Alignment page on Colorado Shines PDIS for contact information.</p> |  |

Step 2 – Marking Learners as Registered, Having Attended and Completed the Course

There are two ways to mark learners as registered, having attended, and completed a course. The first is by manually marking users by logging into Colorado Shines PDIS, adding the event date, searching for users, adding them into the course, and marking them as attended and completed. The second way is through a third-party batch upload which involves creating a data file and uploading it into Colorado Shines PDIS. You will need to contact the training alignment coordinator if you are interested in the batch upload option.

| | |
|---|--|
| <p>Manually Marking Users</p> <p>1. Manage Learning</p> <p>Select Manage Learning from main menu after logging-in. Then select Manage Scheduled Events.</p> |  |
| <p>2. Select Add New Scheduled Item</p> |  |
| <p>3. Schedule Configuration</p> <p>A. Enter the first word or two of your Course name. Select your course from the drop-down menu that appears</p> <p>B. Click on the small black arrow for a drop-down menu from Scheduled Event. Select your course name.</p> |  |

4. Event Date

Dates: Please click on the date of your event. You may scroll through the calendar by selecting a small black arrow to either the left or right of the month and year listed at the top of the calendar. The date you select will populate the text box below the calendar under **Current Schedule Information**. Click on the date in the calendar if you wish to remove a date.

Please Specify the Time and Date(s) for this Scheduled Event:

★ Time Zone: US Mountain Standard Time

★ Class Time: 8:00 AM to 5:00 PM

Days(s) highlighted indicate unavailable selection(s) for that date/time:
□ Classroom Unavailable □ Instructor Unavailable □ Both Unavailable

July 2019

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| > | 7 | 8 | 9 | 10 | 11 | 12 |
| > | 14 | 15 | 16 | 17 | 18 | 19 |
| > | 21 | 22 | 23 | 24 | 25 | 26 |
| > | 28 | 29 | 30 | 31 | | |

Current Schedule Information:
Full listing of selected schedule:
07/26/2019

5. Registration Settings

Scroll down to **Registration Type**.
Registration Type: Click on **More Options**.

Registration Settings

★ Registration Status: Registration Open

★ Registration Type: Open Registration
Users are allowed to view and register for

[More Options...](#)

Open Registration Starts: _____

Open Registration Ends: _____

★ Registration Restriction: Available to Everyone
All Users are allowed to view and register for this schedule.

6. Registration Settings

Registration Type: Click on the **Managed** button. This option allows you to register users and mark them as attended and complete but does not allow users to self-enroll. See Registration Types, page 23, to learn more about registration types and payment options.

Scroll down and select Save & Exit.

Registration Settings

★ Registration Status: Registration Open

★ Registration Type: Open Registration
Users are allowed to view and register for this schedule. Registration is restricted only by the configured Capacity.

Less Options...

Open Registration, Requires Approval
Users are allowed to view and register for this schedule, but the registration must be approved by an administrator or designated instructor.

Managed
Users are not allowed to view or register for this scheduled event. Registration is Managed by an administrator or designated instructor.

Open Registration Starts: _____

Open Registration Ends: _____

★ Registration Restriction: Available to Everyone
All Users are allowed to view and register for this schedule.

[More Options...](#)

7. From the Main Navigation Menu, select Manage Learning and then Manage Scheduled Events – Search Options

- A. **Course:** Type the course name in the text box or search for your course using the drop-down menu and select your course.
- B. **Scheduled Event:** Select the **Scheduled Event** text box and using the dropdown menu, select the scheduled event you'd like to view. The course name and scheduled event often have the same name. Click on **Search**.

8. Scheduled Event – Managing Registrants and Editing Events

Click on the **name of the course** to enter into Manage Event or you may select the blue **Manage** button to the right. This lets you view and manage the registered users for this particular event of your course. The blue **Edit** button to the right allows you to enter into the event and make changes to the date, time, capacity, location, etc. Please be sure to **Save Schedule** if you make any changes. **Note event dates before selecting the course name if you have multiple events listed.**

| Scheduled Event | Event Identifier | Date(s) & Times | Status |
|---|------------------|--|-------------|
| Example Scheduled Event with Survey 2 Course: Example Course - Scheduled Event with Survey 2 - v.1 (ExSchedEvtSurvey2) Created By: Vector Admin | | 5/04/2018 8:00 AM to 5:00 PM (US Mountain Standard Time) | In Progress |
| Example Scheduled Event with Survey 2 Course: Example Course - Scheduled Event with Survey 2 - v.1 (ExSchedEvtSurvey2) Created By: Mary Heffernan | RMECC 2019 | 5/23/2019 8:30 AM to 5/30/2019 3:00 PM (US Mountain Standard Time) | In Progress |

9. Scheduled Item Options – Viewing Registered Users, Removing and Adding Registrants

You will see a list of those who are registered for your course.

- A. To **remove a registrant**, select the box to the left of the person's name to highlight the row. Then click on the red **Remove Selected** box below the list. Then select **Update Information**.
- B. To **add a participant**, click on the **Search & Add User(s)** tab.

10. Scheduled Item Options – Adding Registrants

- Enter the user's **first and last name**. Click on **Search**.
- User's name appears under Search button. Highlight the person's name by **clicking on the box** that is to the left of their name. Click on **Add Selected User(s)** box. You will see a spinning blue circle while the system processes your request. Click on Registered Users & Management tab to confirm user has been registered. You may also search by Unique ID which is the user's email address. Comparing the user's name and corresponding email address to the sign-in sheet is a great way to confirm you have the correct person.

Registered Users & Management Search & Add User(s) Instructor Downloads & Resources

Search Filters:

Hierarchy Node: Colorado
Begin typing to search for nodes.

First Name: Mary

Last Name: Heffernan

Unique ID:

Status: Active

Apply for Administrative User: Type here to begin searching...

Search

There are currently 21 spot(s) available for registration.

| | Last Name | First Name | Unique ID | Registration Date |
|-------------------------------------|-----------|------------|----------------|---|
| <input checked="" type="checkbox"/> | Heffernan | Mary | kmheffernan@co | (New Course Enrollment will be created) |

11. Scheduled Item Options – Managing Registrants' Status

 *In order for participants to receive course hours or credit for attending and participating in the course, course owners or those who are responsible for the event, must mark each participant as Attended and Completed within seven days of the course date. Please complete Status, Score, and Completion Date.*

- Click on all of the boxes to the left of registrants' names. Locate the **Status** drop down box. Use the dropdown arrow and select **Attended and Completed**. Then click on **Set** to mark all registrants as Attended and Completed. You may also mark registrants individually by using the status drop down box in the same row as their name. For example, a participant may have attended the course but needed to leave early and therefore didn't complete the course. You would select **Attended but did not Complete**.

Registered Users & Management Search & Add User(s) Instructor Downloads & Resources

Registration Status: Registration Open

Scheduled Event Completed

Important:
Please be sure to assign a final Status and Score for each User in order to properly update each User's transcript.

| Last Name | First Name | Email Address | Status | Score | Completion Date |
|-----------|------------|-------------------------|----------------------|-------|-----------------|
| Heffernan | Mary | kmheffernan@comcast.net | Currently Registered | 0.00 | 6/14/2019 |

Remove Selected

Update Information Exit Email Currently Registered Users

- Remember to select **Update Information** to save any changes.
- B. **Score** Mark all participants as having 100% score unless a scored test was administered and you enter individual scores earned.
- C. **Completion Date** Click on **Set** under Completion Date to mark all attendees as having completed on the day of the event. You may also mark participants individually with another date if needed.
- D. Remember to select **Update Information** to save any changes.
- E. **Email Currently Registered Users** You may email registrants to remind them about the course, to let them know they have been marked as attended and completed, or to give them any other information about the course.

Step 2A – Batch Upload of Data for Course Completion

Another option for marking attendees as completing a course is to import data from a file. You will need additional permissions in Colorado Shines PDIS to complete a third-party upload. Please contact the training alignment coordinator to arrange for this permission and instruction on how to complete a batch upload.

Step 3: If View/ Select Schedule Becomes Too Long in Registration Area

You may notice the View/Select Scheduled page linked through the Course Catalog and registration becomes very long once you have entered several event dates. You may go to **Manage Learning**, enter the course schedule, and mark **Registration Settings** as **Managed** after you have marked students as attended and complete for the event date. Or, you may change **Registration Open** to **Registration Closed**. The event will no longer be viewable. Keep in mind you need at least one active event for the course to be seen in the course catalog.

The screenshot shows the 'Registration Settings' form. The 'Registration Status' is set to 'Registration Open'. Under 'Registration Type', 'Managed' is selected with a checkmark. Below this, there are fields for 'Open Registration Starts' and 'Open Registration Ends'. A 'Less Options...' link is visible above the 'Managed' option.

How Users Register for a Course Listed in Colorado Shines PDIS

1. Log-in to Colorado Shines PDIS & Explore Courses

PDIS Users log-in to the system and select Course Catalog from main menu. Course Catalog appears with instructions on how to select a topic. Users may use the drop-down menu or perform a key word search.

A. **Course Exploration** Clicking on the course title will take the user to the course details page. Courses with scheduled event dates have a link to event dates. Course advertisements contain contact information such as a hyperlink.

The screenshot shows the 'Course Catalog' interface. A red arrow points to the 'Course Catalog' link in the top navigation bar. Below the navigation bar, there are instructions: 'are organized around the eight competency domains. Some categories have more than one page of options, make sure to scroll on the next page if needed. Some courses are offered by other providers and are listed on PDIS for you on the course description to find course locations. A list of all PDIS courses is available here. Find Level 2 courses from the drop down or using the search'. There is a search bar and a dropdown menu for categories. Below these are several course cards, each with a 'Get Item' button. One card is titled 'ABC Mary's Specific Events Test'.

2. View Scheduled Event(s) for this Course

Click on **Click here to view the scheduled date(s)**. This takes the user to **View/Select Schedule** page.

The screenshot shows the 'View/Select Schedule' page for the course 'ABC Mary's Specific Events Test'. It displays 'Course Hours: 1.00' and 'Scheduled Event(s) for this Course'. A red arrow points to the link 'Click here to view the 2 available scheduled dates'.

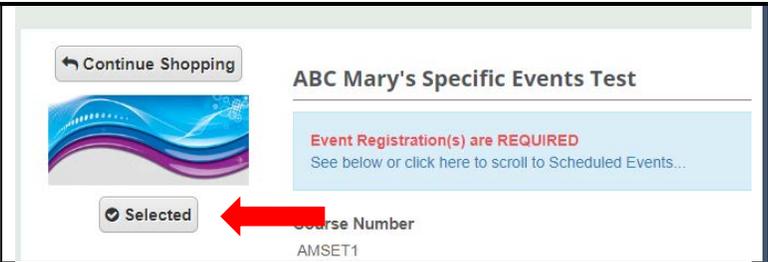
3. View/Select Schedule

User scrolls down page to view available event dates and details. User clicks on green **Click here to Register for this Scheduled Event**.

The screenshot shows the 'View/Select Schedule' page for the course 'ABC Mary's Specific Events Test (123)'. It displays a 'Reminder E-mail Date' field, a calendar icon, and a table of scheduled dates. The table shows a date of 05/31/2019 with a calendar icon showing 'May 31'. Below the table, there are details for the event, including 'Event Identifier', 'Topic', 'Event Contact', 'Instructor', 'Location', and 'Room'. At the bottom, there is a green button labeled 'Click here to Register for this Scheduled Event' with a red arrow pointing to it.

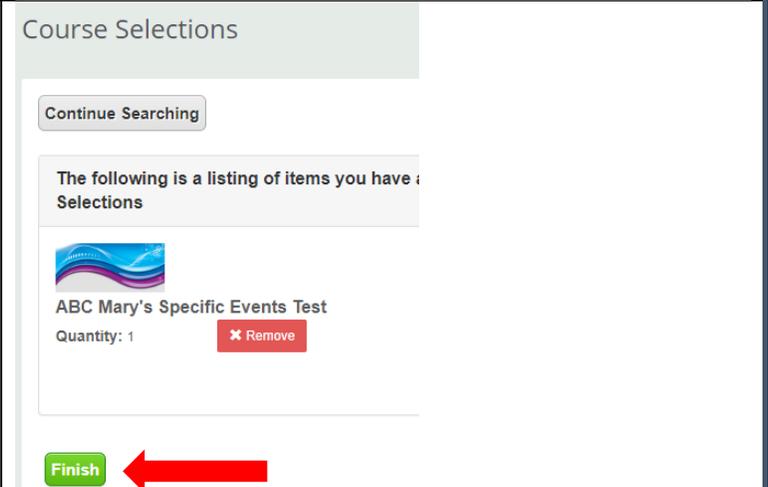
4. Selected

System brings user back to course details in the course catalog. User clicks on the **Selected** box below the course icon.



5. Course Selections

User clicks on green **Finish** button to complete registration. You will see a spinning blue circle while the system processes your request.



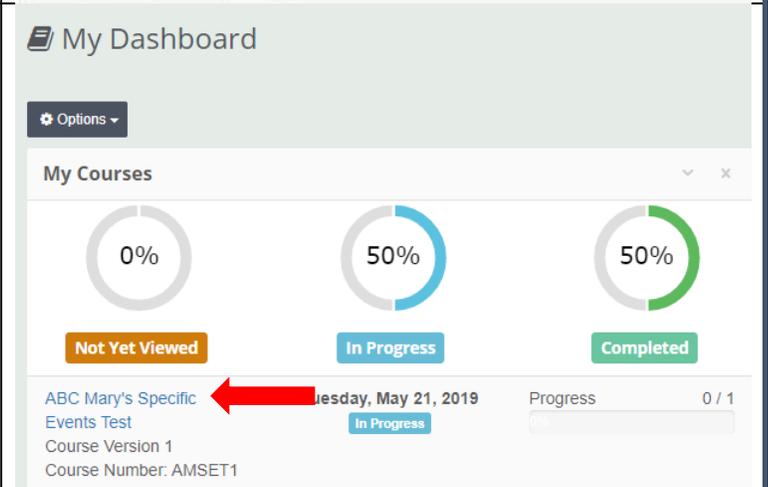
6. Course Confirmation

My Courses page appears with **Course Information** listed. User may click on course title to see event details.



7. My Dashboard

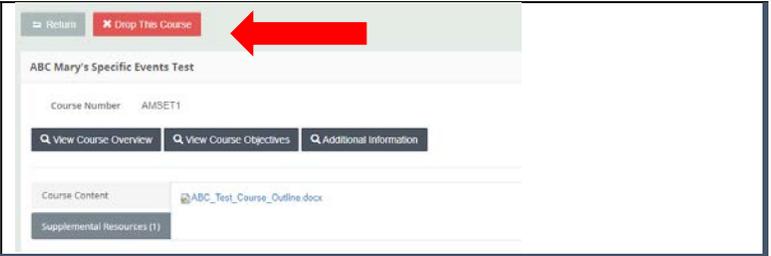
User may also view their registration in **My Dashboard** through the main navigation menu. User may click on course title to see event details. Users are encouraged to call the Colorado Shines PDIS Help Desk at 1.844.447.4441, option 2 if they have any questions around registering for a course.



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8. Dropping a Course

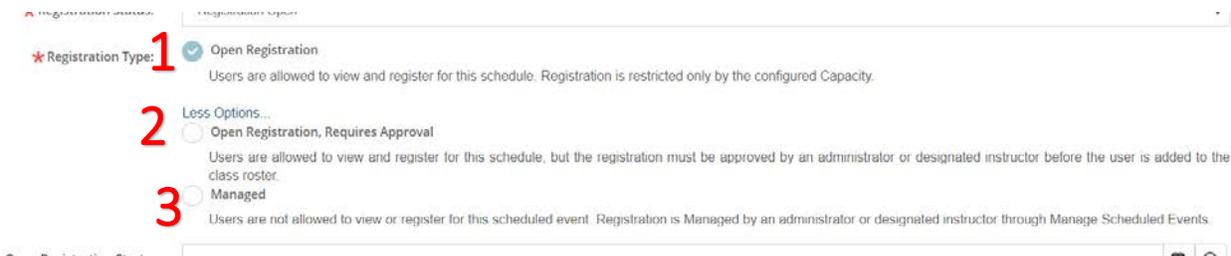
User selects **My Dashboard** from main navigation menu. Select **course title**. Click on red **Drop This Course**.



Understanding Registration Types

There are three registration types to choose from when setting-up a scheduled event.

1. **Open Registration** – Allows users to view the scheduled event and register through PDIS. Users are listed in the roster as currently registered. Emails may be sent through PDIS to all currently registered participants.
2. **Open Registration, Requires Approval** – Allows users to view the scheduled event and register with a pending approval/wait listed status on the roster. The instructor, or course owner, needs to enter the scheduled event roster to change the registrant's status from pending approval/wait listed to currently registered. This registration type is ideal for organizations that need to receive payment before allowing a participant to be fully registered. This registration type may also be used if some type of pre-requisite is required for registration.
3. **Managed** – Users cannot view or register for scheduled events. Only an administrator or designated instructor may add registrants to the roster. This registration type may be ideal for events set-up for a specific program or when an instructor needs or wants to strictly manage the roster. For instance, you may need participants to register through your organization's site and then add them to the PDIS roster to mark them as attended and completed after the event has taken place.



Payment Considerations:

PDIS is not set-up to accept any kind of fees. Organizations that need to charge a fee may consider several options that are entirely up to their discretion and use. Organizations may utilize options 2 or 3, Understanding Registration Types above, to manage registration when they also need to collect a fee. Professional development organizations have utilized online payment systems such as EZRegister and JotForm or mobile payment services such as Venmo. Selection and utilization depend upon your specific needs. Please research various options thoroughly. Payment instructions may be listed in the syllabus area when creating a scheduled event. Payment instructions may also be included in the registration information section of the course posting. Please contact the training alignment coordinator for assistance if needed.

Assistance, Changes, and Contact Information:

Please contact the training alignment coordinator if you need assistance with managing your course on Colorado Shines PDIS or if changes need to be made to the course description. Please make sure to notify us of any updates with web links and payment options. Contact information appears on the Apply for Training Alignment menu navigation of Colorado Shines PDIS.

Expiration Dates and Renewals:

Courses expire three years from the date they were published on Colorado Shines PDIS. An email notification and renewal form will be sent to the course owner one month prior to course expiration. The course owner is responsible for completing and submitting the renewal form.

Removal of a Course from Colorado Shines PDIS:

Course owners must submit via email a request to remove a course from Colorado Shines PDIS. The course will be removed within 15 business days of training alignment coordinator's acknowledgement of receiving written request.

A course may be removed from the Colorado Shines PDIS if no activity occurs within a 12-month period, if course agreement is not adhered to, or for any other reason as determined by the Colorado Shines PDIS Training Alignment Process Core Team. Email notification will be sent to course owner.

Offering Training through Virtual Platforms:

Webinar events that take place through virtual platforms are an acceptable form of professional development. You may offer your face to face training virtually, however, the training must continue to meet all standards including:



- Learning objectives that meet ABCD requirements, 30% of time needs to be interactive, learning checks must take place, and learning transfer must be present.
- Trainers leading webinar events should take precautions to ensure the platform is secure such as, but not limited to, participants entering a code or password to enter the event and trainers having control of participant audio/video. Virtual platform link should be emailed directly to participants and not posted publicly.
- Trainers must keep track of attendance and time spent in the session.
- In addition to a course evaluation, trainers must require participants to submit an assessment or assignment so authentic learning and participation may be gauged. Assessment/assignment may include but is not limited to a quiz on content, a submitted lesson or implementation plan, a completed chart or handout, or a written summary of the training. Participants may be marked as attended and completed once the assessment/assignment is received by the trainer, reviewed, and feedback is delivered to the participant by the trainer. Trainer may require participant to re-submit assessment/assignment.