RSS TRAINING GUIDE FOR ASSOCIATES

Enrollment and Managing Attendance

Contents

Introduction to Managing Attendance

Enrollment is the process for recording attendance. The new system is "Account-based" meaning that every learner will need to access/create an account at http://cce.geisinger.edu.

There are three methods for recording attendance:

- SMS texting
- Importing (Excel Spreadsheet)
- Search and Enroll (Manual Entry)

Step by step instructions for each enrollment method are included in this guide.

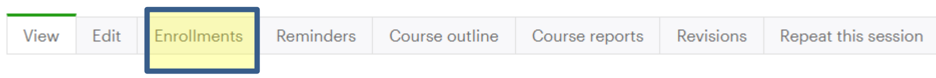
Please Note:

- **The preferred method is SMS Texting.**
- ALL three options are available for each session. For example, you can use SMS Texting but still use the importing tool for the same session.

View and Edit Attendance Records

The associate can view and edit attendance records for each session. For example, if a learner is inadvertently enrolled, the associate can remove the enrollment.

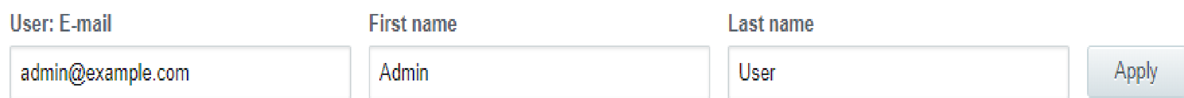
Step 1 – Go to a session and click on **Enrollments.**



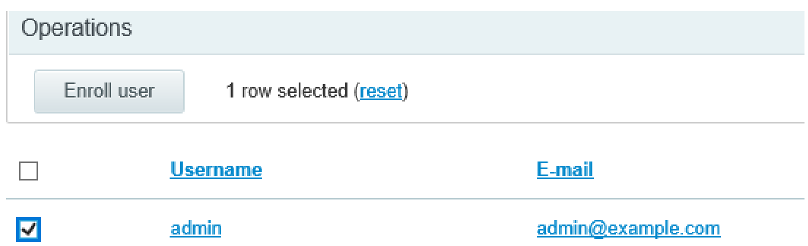
Check that you are on **Administer**. You are now viewing a list of all existing learners.

	Username	E-mail	First name	Last name	Enrollment created	Enrollment started	Enrollment ends	Attended	Type
	admin	admin@example.com	Admin	User	11/26/2019 - 10:17am	11/26/2019 - 10:17am		Attended	Bulk enrollment
	johndoe	johndoe@dlc-solutions.com	John	Doe	11/26/2019 - 10:18am	11/26/2019 - 10:18am		Attended	Bulk enrollment

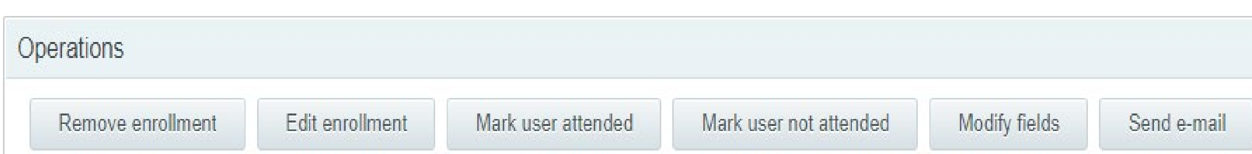
Step 2 – To edit enrollments, type in any part of their **first** and/or **last name** and/or email.



a. Once their name appears place a check mark in the box of the record you are editing.



b. Check the box to select the applicable user(s), once they are selected, choose the option relevant to the situation. For example, “Mark user attended.”



Important Note: The list includes all learners who have an account and have been awarded credit for this session (entered by SMS text, Importing, and/or Search and Enroll).

If you are looking for a learner who was imported but is not listed in the **Administer** tab, it is likely that the learner did not create an account.

Method One: SMS Texting

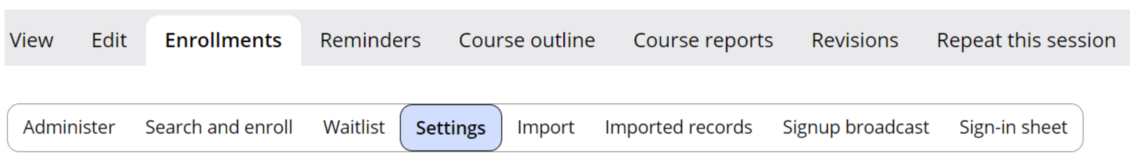
The new system allows learners to record attendance **by sending an SMS text message**.

- Learners must have Mobile enabled in their account.
- Once the session is in the “Approved” state (refer to the Session Workflow for more information), the RSS associate will have access to a unique code for each session.
- The associate will share this with the learners at the beginning of the session.
- Once the learner texts the session code, they will receive text confirmation and credit is awarded instantly.
- If a learner does not have their mobile device, they may go to this site: https://cce.geisinger.edu/code

Step 1 – Access your **Series** and applicable **Session**.

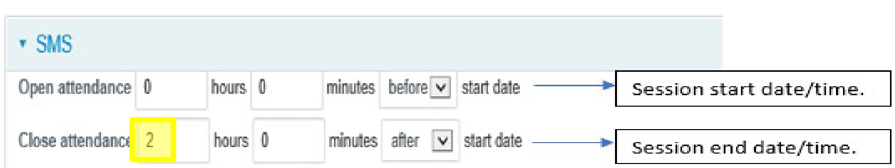
Step 2 – Click on **Enrollments.**

Step 3- Click on **Settings**.



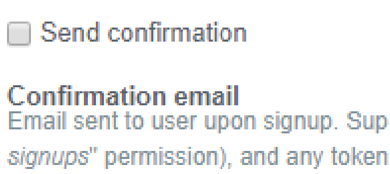
a. Ensure **Enrollments** are closed if you don’t want new enrollments.

b. Adjust the time for how long you want the SMS enrollment to be open (i.e. when a learner will be allowed to text the code).



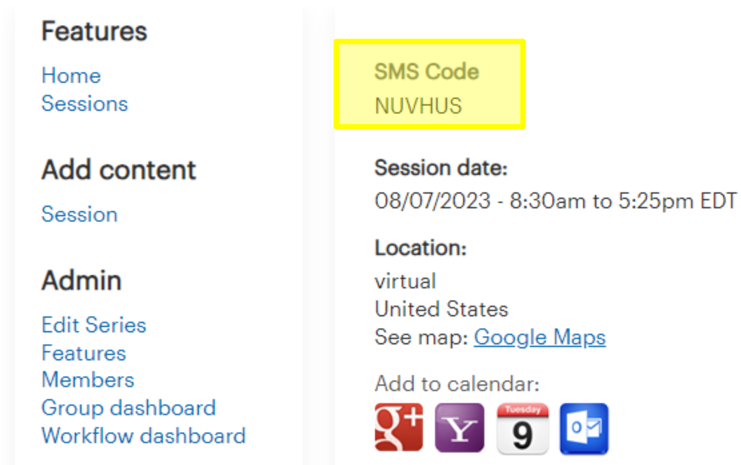
In this example, a learner can text at the time the session begins and 2 hours after the session.

c. Do not send a confirmation email. The learner will receive an automated text notification (**leave unchecked**).

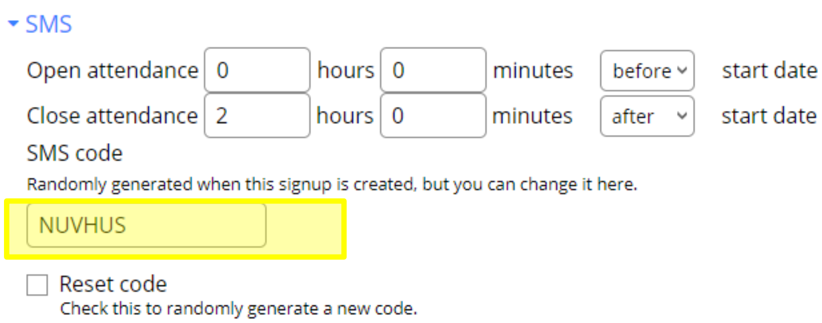


Step 4 – Once the session is in the "Approved" state (refer to the **RSS TRAINING GUIDE FOR ASSOCIATES: Session Workflow** for more information), the course contact will have access to a unique code for each session. The course contact can find the unique 6-digit code on the landing page of the session and in Enrollments.

1. **On the landing page of the Session:**



2. In **Enrollments**, choose **Settings**:



<u>**Step 5**</u>: Provide the SMS code to the learners. There is not a required method for communicating the unique code along with the phone number to text to, **570-605-4723**. Examples of a PowerPoint Slide version and a Word Document version are available at http://cce.geisinger.edu.

Method Two: Importing

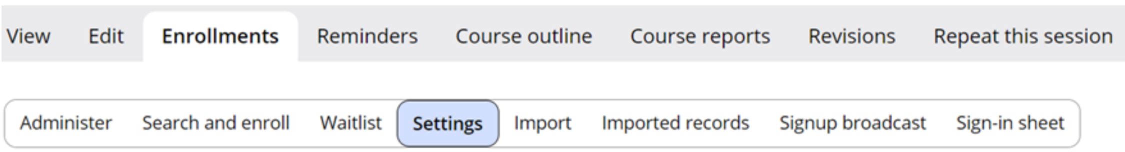
Importing is a tool than can be used to import attendance using an Excel spreadsheet. Records are matched to users by email address.

Please note: Importing is the only option to record attendance for learners who have not created an account. If an attendance record is imported and no matching user account is found, the records would be placed into a holding table until a learner with a matching email address creates an account. At the time the learner creates the account, the imported record pertaining to the matched learner would then be assigned to the learner.

Step 1 – Access your **Series** and applicable **Session**.

Step 2 – Click on **Enrollments**.

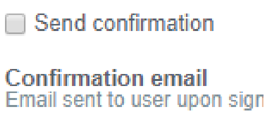
Step 3 – Click on **Settings**.



a. Ensure **Enrollments** are closed. Ideally, no one else should be enrolling in the course at this time.

Please note: The SMS section is not relevant when you are enrolling using the importing spreadsheet.

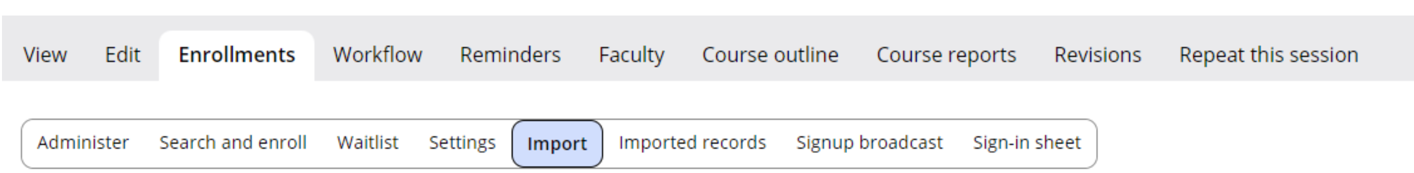
b. **OPTIONAL:** Check **Send confirmation** if you want to send an email to every learner that you enroll using the importing tool.



Example:

Thank you for attending the session, [Insert Title]. The credits have been added to your "Session Credit" under Activities from your profile page, http://cce.geisinger.edu.

Step 5 – Click on **Import.**



a. Download the template (or use a previously saved version).

Import

Import CSV files with one or more of these columns: external_course_id, title, external_use attended, city, province, country, participant_category.

Columns **external_course_id, external_user_id, external_email** are mandatory and values

Download a template

b. The spreadsheet will include the following fields. **<u>Enter the highlighted fields as listed below</u>**:

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
external_course_id	external_user_id	external_email	title	first_name	last_name	enrollment_start	enrollment_end	credits	credit_type	credit_expiration	complete	date_completed	attended	city	province	country	participant_category
LEAVE BLANK	LEAVE BLANK	USER EMAIL ADDRESS*		Optional but recommended	Optional but recommended	LEAVE BLANK	LEAVE BLANK	LEAVE BLANK	LEAVE BLANK	LEAVE BLANK	LEAVE BLANK	LEAVE BLANK	1*	LEAVE BLANK	LEAVE BLANK	LEAVE BLANK	LEAVE BLANK
*required																	

*** Records are matched to users by email address**
****You must enter a "1" in this field or the learner will not receive credit.**

<u>Please note</u>: It is easier to look-up attendance records if you enter a first and last name.

Below is an example of a completed spreadsheet:

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
external_course_id	external_user_id	external_email	title	first_name	last_name	enrollment_start	enrollment_end	credits	credit_type	credit_expiration	complete	date_completed	attended	city	province	country	participant_category
LEAVE BLANK	LEAVE BLANK	USER EMAIL ADDRESS*		Optional but recommended	Optional but recommended	LEAVE BLANK	LEAVE BLANK	LEAVE BLANK	LEAVE BLANK	LEAVE BLANK	LEAVE BLANK	LEAVE BLANK	1*	LEAVE BLANK	LEAVE BLANK	LEAVE BLANK	LEAVE BLANK
		Testj@geisinger.edu		John	Test								1				
		Testm2@gesinger.edu		Molly	Test								1				
*required																	

c. Once you have everyone entered in the document, save to your computer (you will need to access the saved spreadsheet in the next step). **<u>Please Note:</u>** Do not change the file type. It must be a CSV (Comma delimited) (*.csv) file type.

d. Under "file" click **Choose File** and upload the document.

File
Select a different file from your local system.

Choose File No file chosen

Assign

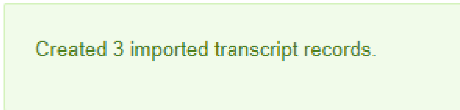
Assign records immediately
This will attempt to assign records immediately instead of waiting for a matching user to log in.
WARNING: This has performance issues with large imports. Notifications set on existing courses may be sent out to users.

Import

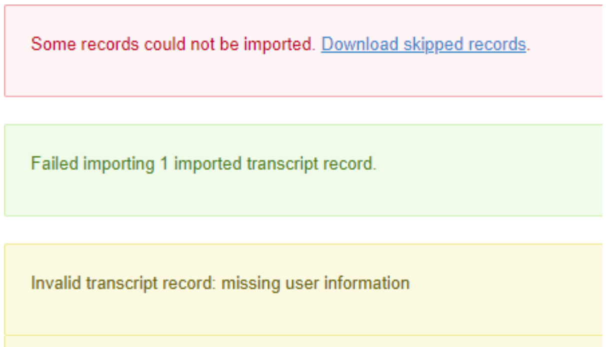
e. Check the box at the bottom "Assign records immediately" and "Import".

f. Once imported, a message will display on the screen.

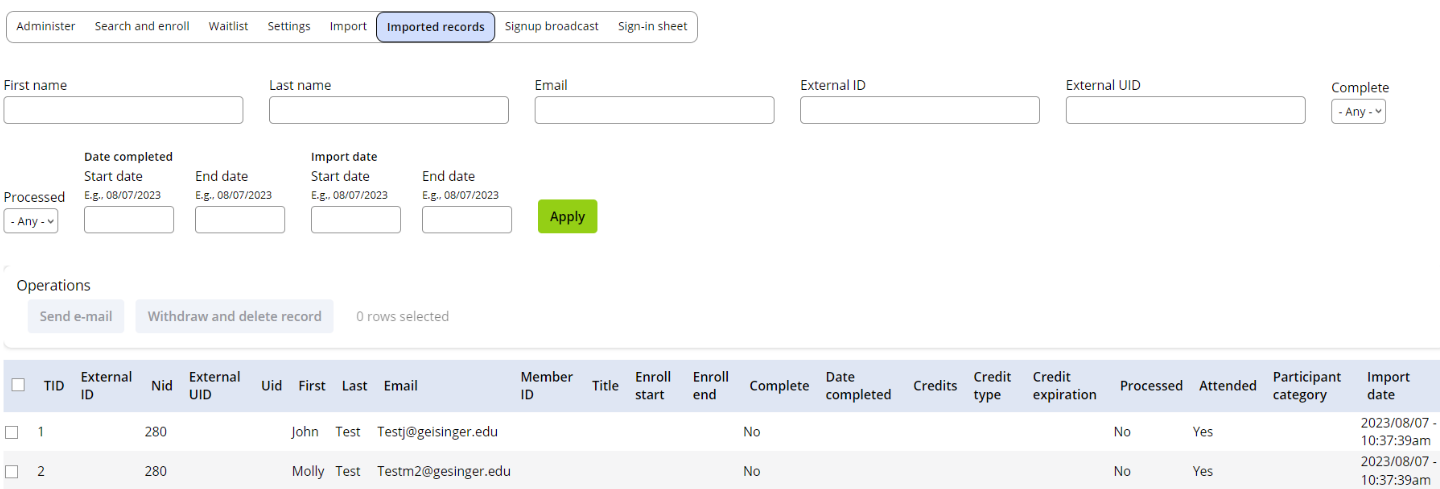
Success Example:



Failure Example:



g. To view imported record, choose **Imported Records**.



	TID	External ID	Nid	External UID	Uid	First	Last	Email	Member ID	Title	Enroll start	Enroll end	Complete	Date completed	Credits	Credit type	Credit expiration	Processed	Attended	Participant category	Import date
☐	1		280			John	Test	Testj@geisinger.edu					No					No	Yes		2023/08/07 - 10:37:39am
☐	2		280			Molly	Test	Testm2@gesinger.edu					No					No	Yes		2023/08/07 - 10:37:39am

Method Three: Search and Enroll

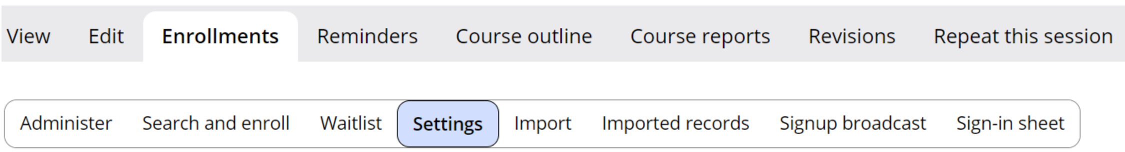
The **Search and Enroll** feature can be used to manually record a learner's attendance.

- You will be able to enroll any user this way, but they must already have an account created.
- This is a good option for enrolling a few learners, but time consuming if you are enrolling a large number.
- You must enroll the learner **AND** mark the learner as attended.

Step 1 – Access your Series and applicable Session.

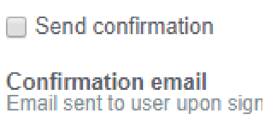
Step 2 – Click on **Enrollments.**

Step 3 – Click on **Settings**.



a. Ensure **Enrollments** are closed as no one else should be enrolling at this time.

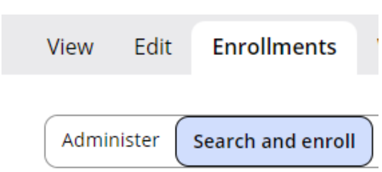
b. <u>**OPTIONAL:**</u> Check **Send confirmation** if you want to send an email to every learner that you enroll using the importing tool.



<u>**Example:**</u>

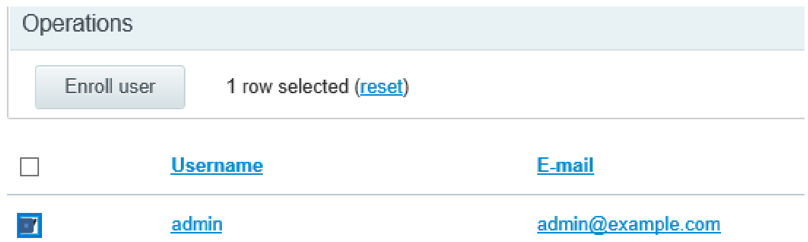
Thank you for attending the session, [Insert Title]. The credits have been added to your "Session Credit" under Activities from your profile page, http://cce.geisinger.edu.

Step 4 – Click on **Search and Enroll**.



a. Type in any part of their **first** and/or **last name** and/or email. ***Reminder***: the learner must have an existing account to use "Search and Enroll

b. Once their name appears place a check mark in the box and click “Enroll user”.
Please note*:* You must also mark the learner as attended (next step).



c. Check the box to select all the enrolled users, once they are all selected, click mark users attended.