Managing Enrollment

VIEWING THE SESSION ATTENDEE LIST

From Administrator **Main Menu**

- Search for the existing session
- Check the box to the left of the ☑ Underlined Session Title
- Attendees *(The* **attendee List** *displays all individuals regardless of status – Enrolled, Cancelled, Waitlisted…)*

ENROLLING PARTICIPANTS

From the **Session Attendee List**

- Enroll
- Type person's Legal Last Name, Legal First Name, and/or Login ID into appropriate fields
- Search
- Check the box to the left of the ☑ Person's Underlined Name
  (If enrolling multiple people, repeat these three steps to identify and select each person.)
- ➡
- OK *(E-Track queues* Enrollment Reminder Notice *notifications)*

CANCELLING ATTENDEES

(Use Cancel Attendee *if registration process was done correctly but registrant will be unable to attend. "Cancelled" registrations become a permanent part of the person's training history.)*

From the **Session Attendee List**

- Check the box to the left of the ☑ Person's Underlined Name
- Cancel Attendee
- OK *(E-Track queues* Cancel Student from a Session Notice *notifications)*

DROPPING ATTENDEES

(Use Drop Attendee *if registration was made in error. "Dropped" registrations will not appear on the person's training history.)*

From the **Session Attendee List**

- Check the box to the left of the ☑ Person's Underlined Name
- Drop Attendee
- OK *(No notifications are queued)*

SPECIAL NOTE: *When dropping an attendee from a session that serves as a prerequisite for a future session for which the attendee is registered, E-Track will alert you that "Dropping from this learning will automatically withdraw (this person) from other learnings which require this learning..." If you proceed, you must first re-enroll the person in another session of the required learning before re-enrolling the individual in the session(s) from which he/she was dropped.*

RESERVING SEATS

Use the Reserve Seats *option:*

– *To ensure space is available for a target audience, i.e. staff from a particular county*
– *To track registrations from private agency staff and caregivers and/or others from outside the OCWTP*

From the **Session Attendee List**

- Reserve Seats
- Organizational Hierarchy (OPTIONAL) – You may use this option if reserving seats for a target audience within the OCWTP:
  - Click
  - Click on the yellow folder icons until hierarchy level for which seats are being held is displayed
  - Click on the Underlined Hierarchy Level
- Assign the Internal Sponsor – the individual creating or approving the reservation
  - Click
  - Type your (or another person's) Legal Last Name, Legal First Name, and/or Login ID into appropriate fields
  - Search
  - Click on the person's Underlined Name
- Type in Number of Seats* you wish to reserve
- **NOTES** field (OPTIONAL) - Type in the names and agencies and/or contact information (phone or email) of the persons for which you're reserving seats.
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FILLING RESERVED SEATS

To fill reserved seats with people who have records in E-Track:

From the **Session Attendee List**

- Check the box to the left of the Internal Sponsor's name *(identified by* STATUS *of* Reserved/Enrolled*)*
- Fill Reserved Seat
- Type the person's Last Name, First Name, and/or Login ID into appropriate fields
- Search
- Click on the person's Underlined Name
- *(E-Track queues* Enrollment Reminder Notice *notifications)*

CANCELLING RESERVED SEATS

If you create one reserved seat for each individual and need to cancel that individual:

- Locate the reserved seat for the person who is cancelling
- Check the box beside the Internal Sponsor's name for that reservation
- Drop Attendee

To remove a person from a reserved block (of multiple seats)

- Check the box beside the Internal Sponsor's name for any seat in that reserved block
- Reservation Details
- Delete person's name from Notes field (if applicable)
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- Re-check the box beside the Internal Sponsor's name for any seat in that reserved block
- Drop Attendee (This reduces the number of reserved seats by one.)
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