

# Verifying Survey Delivery On the Session End Date


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**For best results, on the session end date:**

## 1. Apply cancelled status to attendees, as necessary:




**IMPORTANT NOTICE:** Whether cancelling individuals or an entire session on or after the session end date, *it is very important that Cancelled status be applied to each individual from the Session Attendee List screen so that surveys are removed from to-do lists:*

From Administrator **Main Menu**

- Search for the existing session
- Check the box to the left of ☒ the Underlined Session Title
- Attendees
- Check the box(es) to the left of ☒ the Underlined Name of each person you wish to cancel from the session.
- Cancel Attendee
-  (E-Track queues cancellation notifications)





## 2. Process No-Shows:

From the **Session Attendees List** screen:

-  to return to the Session Search Results screen
- With the box beside the ☒ Underlined Session Title selected, click on Process Roster
- ☒ the box beside each individual who will receive No-Show status
- In the STATUS drop-down field, select No-Show for each individual who will receive No-Show Status
- Click on the Process icon 
- Click on the  to return to the **Session Search Results** screen



## 3. Remove Surveys for No-Shows:

From the **Session Search Results** screen:

- With the box beside the ☒ Underlined Session Title selected, click on Attendees
- ☒ the box beside the individual with No-Show status
- From the left-side menu, select Training Notebook
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- ☒ the box beside the survey
- From the left-side menu, click on Mark Survey Removed
- In the resulting pop-up window, click 
- Click on the  to return to the **Session Attendee List** screen
- Scroll down and click on the  to return to the **Session Search Results** screen

***After you've processed cancellations and no-shows, use the Process Roster screen to verify that all session attendees have a survey on their to-do list:***

**To verify that all session attendees have a survey on their to-do list:**

- If you're still on the **Session Attendee List** screen, scroll down and click on the  to return to the **Session Search Results** screen
- Check the box beside the  [Underlined Session Title](#)
- [Process Roster](#)

The resulting screen lists all individuals with *Enrolled* or *Wait Listed* status.

- Verify that **ALL** individuals with *Enrolled* status have a survey – indicated by a red circle with an exclamation mark.

**NOTE:** *Wait Listed* individuals will **not** have a survey.