E-Track Session Management Checklist

**Session Creation**

Follow the Help Center [Create A Session](https://e-track.knowledgeowl.com/help/09-create-a-session)\* instructions. Once the session has been entered and saved, complete the following:



Note the session local code here: OCWT\_\_\_\_\_\_\_\_\_\_\_\_

Go to the Booking & Meeting Times tab to verify each of the following

* There are start/end times for **each** day the session is held
* There is a Meeting Location for **each** day the session is held
* The first session date is listed first for a multiple-day session
* AM/PM are correctly selected for start/end times
* The facilitator is listed for **each** session date
* The date and times associated with the facilitator are correct and match the session dates/times.

 Identify the date range (list here:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_) when the session roster should be processed (8-10 days after the session occurred, counting the session end date as day 1).

 Set up a personal reminder for yourself to ensure session is processed on the dates noted above.

**Session Oversight**

 Set up a personal reminder for yourself to check attendance *at least* one week before session start to determine if session should be held. Set additional reminders to coincide with your RTC practices about checking registration numbers of upcoming sessions.

**Enrolling a Walk-In On or After Session Start Date**

Follow the Help Center [Managing Enrollment](https://e-track.knowledgeowl.com/help/managing-enrollment)\* instructions. PAY PARTICULAR ATTENTION TO WHETHER YOU ARE ENROLLING THE PERSON BEFORE THE SESSION **END** DATE. Two examples are below. Refer to Help Center for more scenarios!

If this is a one-day session OR you are enrolling a person ***after* the End Date**:

* Turn off enrollment notices to participant, Supervisor & Alternate Contact
* Change Survey to be delivered At Enrollment
* Enroll person into session

If this a **multiple-day session** *and* you are enrolling the person **before End Date**:

* Turn off enrollment notices to participant, Supervisor & Alternate Contact
* Enroll person into session