User Guide

Reporting of Attendance for IDCEC Approved CEUs
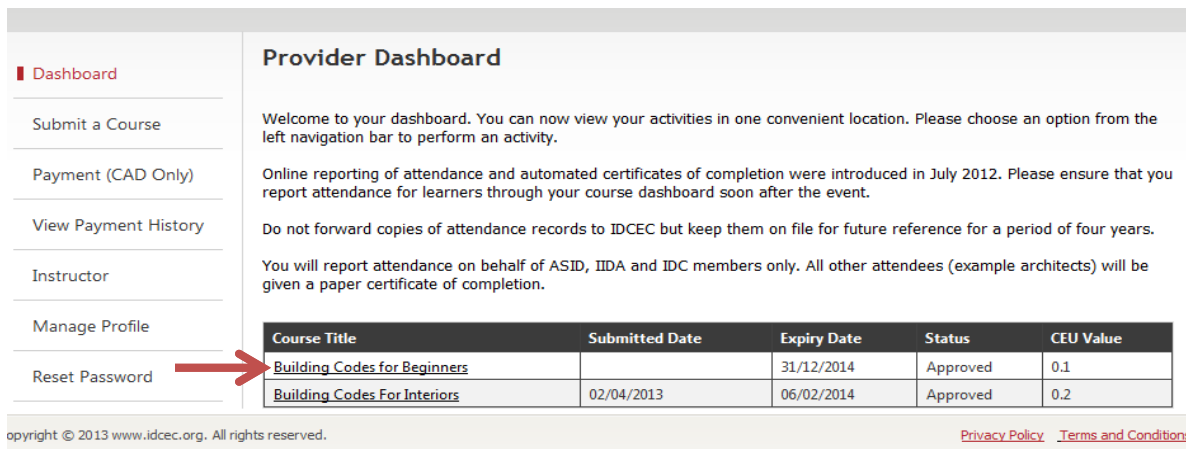
TABLE OF CONTENTS

GENERAL INFORMATION:

Log into your Provider account.

Click on the Course Title.

Choose the correct course schedule and click on Report Course Attendance.

REPORTING ATTENDANCE - BULK UPLOAD

All providers will have the ability to report a number of records within a single Excel file for each class-code generated.

There are certain parameters for a successful upload or deletion of records via an excel file.

- The file that you upload must be a Microsoft Excel file. Prepare the file and save it to your computer before you are ready to upload it.
- The file naming convention should be Class Code-Date-Time. Example: CC-123456-1003-20Apr2016-1230.
- The class-code on the file name must match the class-code for which attendance is being reported.
- Date should be the current date so you can keep track of the file and when attendance is reported.
- Time should be the current time. Example 1200 or 0430. (4 digits).
- Ensure that the header cell in the <u>first</u> column has the label "Learner IDCEC Number" (do not include the quotes).
- Each cell after the header cell must contain an IDCEC number only, which begins with 21-00. Include the hyphen and all zeros.
- Do not use symbols example #, @ etc.
- Do not include spaces before or after the IDCEC number.
- Do not include empty cells between the IDCEC numbers.
- Sample:

	A	B	C
1	Learner IDCEC Number		
2	21-00034925		
3	21-00001000		
4	21-00001002		
5	21-00026705		

ADDING ATTENDANCE RECORDS - BULK

Report Course Attendance Options
You can report attendance for ASID and IIDA learners who have an IDCEC identification number. All other learners must be given a paper certificate of completion. Use this online reporting page after July 01, 2012.

Class Code: CC-102116-1013   Location: Toronto Ontario   Date: 04/Jul/2016

Only use this import format of you have more than 20 attendance records.

For more information about importing IDCEC number see, Help

1. Make sure that the file you want to upload is ready and is on your computer.
2. Choose the "Import Excel File" button.
3. Click on the 'Add' button.
4. Click on 'Choose file' to upload your file.
5. Click the Upload button.

Once the file is uploaded you can exit the page. The file will be uploaded the <u>following day</u> and an email message with the results will be sent to you. ***Make sure that the email address on your account profile is current.***

You can check on reported attendance by going back to the class-code and clicking on "Show Reported Attendance" after one business day. The reported attendees' name should show on the list.

DELETING ATTENDANCE RECORDS - BULK

Follow the procedure below for deleting records that may have been previously reported in error for the class-code in question.

- The file that you upload must be a Microsoft Excel file. Prepare the file and save it to your computer before you are ready to upload it.
- The file naming convention should be Class Code-Date-Time. Example: CC-123456-1003-20Apr2016-1230.
- The class-code on the file name must match the class-code for which attendance is being reported.
- Date should be the current date so you can keep track of the file and when attendance is reported.
- Time should be the current time. Example 1200 or 0430. (4 digits).
- Ensure that the header cell in the <u>first</u> column has the label "Learner IDCEC Number" (do not include the quotes).
- Each cell after the header cell must contain an IDCEC number only, which begins with 21-00. Include the hyphen and all zeros.
- Do not use symbols example #, @ etc.
- Do not include spaces before or after the IDCEC number.
- Do not include empty cells between the IDCEC numbers.
- Sample:

	A	B	C
1	Learner IDCEC Number		
2	21-00034925		
3	21-00001000		
4	21-00001002		
5	21-00026705		

Report Course Attendance Options

You can report attendance for ASID and IIDA learners who have an IDCEC identification number. All other learners must be given a paper certificate of completion. Use this online reporting page after July 01, 2012.

Class Code: CC-102116-1013   Location: Toronto Ontario   Date: 04/Jul/2016

Only use this import format of you have more than 20 attendance records.

For more information about importing IDCEC number see, Help

○ Add Contacts Manually
● Import Excel File

Choose file | No file chosen   ○ Add ● Delete

Upload

1. Make sure that the file you want to delete is ready and is on your computer.
2. Choose the 'Import Excel File' button.
3. Click on the 'Delete' button.
4. Click on the 'Choose file' button and select the file from your computer.
5. Click the 'Upload' button.

Once the file is uploaded you can exit the page. The file will be uploaded the <u>following day</u> and an email message with the results will be sent to you. ***Make sure that the email address on your account profile is current.***

You can also cross check the deleted attendance by going to your class-code and clicking on 'Show Reported Attendance" after one business day. If a record is deleted the name will not appear on the list.

REPORTING ATTENDANCE-INDIVIDUAL RECORDS

Follow the instructions provided in the 'General Information' section and choose the class-code before you proceed.

You can search for a learner number if the attendee has not indicated a learner number. If the search comes up with two or more similar names please email mkoehler@idcec.org with the city where the presentation was held and a telephone number or email address of the attendee, so IDCEC can identify the correct attendee.

Submit a New Course	**Report Course Attendance Options**
Payment (CAD Only)	You can report attendance for ASID and IIDA learners who have an IDCEC identification number. All other learners must be given a paper certificate of completion. Use this online reporting page after July 01, 2012.
View Payment History	Class Code: CC-102116-1013 Location: Toronto Ontario Date: 04/Jul/2016
Instructor	Only use this import format of you have more than 20 attendance records.
Manage Profile	For more information about importing IDCEC number see, Help
Reset Password	● Add Contacts Manually ○ Import Excel File

First Name	Last Name	Association Number	
			Search

Learner's IDCEC Number

☐
☐ [ ]
☐ [ ]
☐ [ ]
☐ [ ]
☐ [ ]
☐ [ ]
☐ [ ]
☐ [ ]

ADDING ATTENDANCE FOR INDIVIDUAL RECORDS

Key in the IDCEC numbers and click "Get Learner's Names". Cross check the names and ensure you are reporting the correct attendees. Then click on "Report Course Attendance' at the bottom of the page.

Once attendance is reported, the system will send an automatic email notifying the attendee that attendance has been reported for the course.

You can check on reported attendance by going back to the class-code and clicking on "Show Reported Attendance" after one business day. The reported attendees' name should show on the list.

DELETING ATTENDANCE FOR INDIVIDUAL RECORDS

Follow the general information steps and choose the class-code before you proceed.

If you have reported attendance for one or more incorrect attendee(s) you can delete the record(s). Records can only be deleted by importing an Excel file containing the attendees' IDCEC numbers.

There are certain parameters for a successful upload of the excel file.

- The file that you upload must be a Microsoft Excel file. Prepare the file and save it to your computer before you are ready to upload it.
- The file naming convention should be Class Code-Date-Time. Example: CC-123456-1003-20Apr2016-1230.
- The class-code on the file name must match the class-code for which attendance is being reported.
- Date should be the current date so you can keep track of the file and when attendance is reported.
- Time should be the current time. Example 1200 or 0430. (4 digits).
- Ensure that the header cell in the first column has the label "Learner IDCEC Number" (do not include the quotes).
- Each cell after the header cell must contain an IDCEC number only which begins with 21-00. Include the hyphen and all zeros.
- Do not use symbols example #, @ etc.
- Do not include spaces before or after the IDCEC number.
- Do not include empty cells between the IDCEC numbers.
- Sample:

	A	B	C
1	Learner IDCEC Number		
2	21-00034925		
3	21-00001000		
4	21-00001002		
5	21-00026705		

1. Make sure that the file you want to delete is ready and is on your computer.
2. Choose the "Import Excel File" button.
3. Click on the 'Delete' button.
4. Click on 'Choose file' to upload your file.
5. Click the Upload button.

Once the file is uploaded you can exit the page. The file will be uploaded the <u>following day</u> and an email message with the results will be sent to you. ***Make sure that the email address on your account profile is current.***

You can also cross check the deleted attendance by going to your class-code and clicking on 'Show Reported Attendance" after one business day. If a record is deleted the name will not appear on the list.

REPORTING ATTENDANCE VIA THE MOBILE APP

Attendance can now be reported with a click of a button by the attendee at the event. This app can be used for all in-person conferences and courses. The scanning feature does not apply to distance learning courses.

For in-person courses:

➢ Schedule a class-code before the event to obtain a QR scanning code via the IDCEC account dashboard.
➢ Print a copy or two so you can post these at the exit after the event.
➢ <u>Do not</u> post the QR code or allow scanning of the attendance before the event.
➢ Make an announcement before the event that attendance will be scanned after the event.
➢ If possible, play IDCEC video that explains the scanning feature before the CEU.
➢ All attendees with an IDCEC number must download the IDCEC App.
➢ Display the QR code at the exit and ensure all attendees with an IDCEC number scan their own attendance.

For in-person conferences:

- ➢ You will find the QR code for each seminar within the conference on your IDCEC account dashboard.
- ➢ Print a copy or two so you can post these at the exit after each seminar is complete.
- ➢ <u>Do not</u> post the QR code or allow scanning of the attendance before the seminar.
- ➢ Make announcement before the event that attendance will be scanned after the event.
- ➢ If possible, play the IDCEC video that explains the scanning feature before the event.
- ➢ All attendees with an IDCEC number must download the IDCEC app.
- ➢ Display the QR code at the exit and ensure all attendees with an IDCEC number scan their own attendance.

The QR code will expire three hours after the event.

For Learners who have an IDCEC number:

Download the IDCEC mobile app.
Scan the QR class-code after the event.

For Learners who do not have an IDCEC number:

Collect their information to send them an electronic certificate by email.
OR
Issue a paper certificate of completion at the event.

To learn more, scan this QR code