Clock Hour Proposal Entry

- Log into your pdEnroller account
- From the Clock Hours drop down menu, choose Clock Hour Proposals

- Click the Drafts tab
- Click the +New Proposal button

- Select **Create New Proposal** (if you want to do a Repeat Past Proposal, please see the "Duplicating a Clock Hour Proposal – Repeat Proposal" guide).
- Enter your Title and an optional Subtitle (we recommend you add the year to the Subtitle, i.e. 2021-2022). Click Save & Continue

- Work your way through each tab. You do not have to go in order. Be sure to click Save at the bottom of the screen before moving to the next tab or leaving the clock hour proposal page. If you leave the clock hour proposal page, your information will be saved (if you clicked the Save button) and you can continue at a later time by going back to your Drafts tab.

Click on the tab links below to jump to the instructions for that specific tab. Click on the blue "Return to tab list" link at the bottom of each instruction page to automatically return to this list.

Proposal tab

- Enter your Event Description. You can type in your description, or you can upload a file (refer to red circle).
- Enter the Documented Need (optional). Again, you can type this in or upload a file.
- Add any Subject and Audience tags. This will help participants find your event more easily if they do a search for certain criteria. Click in the box and a menu will appear.
- Click Save and move to the next tab

Hours/Credit tab

- Select one of the primary credit types for your proposal.
- Enter the amount of clock hours you wish to request for your event.
  - Enter at least 3 course objectives. If you wish to add more, click on the green Add Objective button.
    - Select all the Content Standards that apply.

- **STEM HOURS?**
- If you are not requesting STEM hours, click No STEM requested and then click Save and move to the next tab.
- If you are requesting STEM clock hours, choose from the following:
  - Match Clock Hours (this means your STEM clock hours will be the same amount as your requested clock hours)
  - Custom (choose this if you wish to customize the amount of STEM clock hours; for example, if your session is 6 hours long and 2 hours will involve STEM, you can request 2 STEM clock hours)
- Choose **2 of the 4** STEM elements (a proposal will not let you request STEM clock hours if you do not choose at least 2)
- Answer the Guiding Questions. All questions must be answered Yes and evidence supplied for each question. Type in you answer or upload a file.
- Click Save and move to the next tab.

Date/Location tab

- Choose the Primary Location from the drop down menu. If your location is not listed, select "Other" and complete the details.
- Add your Sessions by choosing one of the options.

- **Add One**: add a single session, or you can add multiple sessions one at a time.
- **Add Multiple:**
  - Select Multiple Dates will allow you to choose more than one event date.
  - Recurring Dates will allow you to set up event dates that reoccur based on the criteria you choose (i.e. the third Wednesday of every month)
  - Add Breakout is still in BETA and all features are not yet available. This feature will allow you to add several breakout sessions to your event and participants will be able to pick and choose which ones to register for.
  - Add Primary Web Link allows you to add the link for a virtual event (Zoom, Google Meet, etc.)
- Click Save and move to the next tab.

Agenda tab

- Type in your agenda or upload a file. For single day events, a complete agenda is required (per ESD 105). If your event will have several session dates, an outline of the course details per session is acceptable.

  > Example 1 of a multi-session course agenda:
  > Day 1: Review key-notes from previous year PLC and discuss best practices for the upcoming year.
  > Day 2: How have we begun to implement our best practices? What is working, what is not?
  > Day 3: Setting goals and what we need to succeed.
  >
  > Example 2 of a multi-session course agenda:
  > Participants will meet on a monthly basis throughout the upcoming school year. During each session we will watch a short video and have a discussion group. Participants will gain knowledge in the 5 SEL competencies and how they are vital to the teaching and understanding of social and emotional learning at school.

- You can choose to have your agenda visible to only those who have registered (Registered Only – this is the default option), hidden from everyone except the clock hour proposal approver committee (Hidden), or public to everyone who views the event catalog (Public).
- Click Save and move to the next tab.

Presenters tab

- Click the Add Presenter button
- Type the presenters first and last name. If they have a record in pdEnroller, it will appear on the left. Click on the name to add.
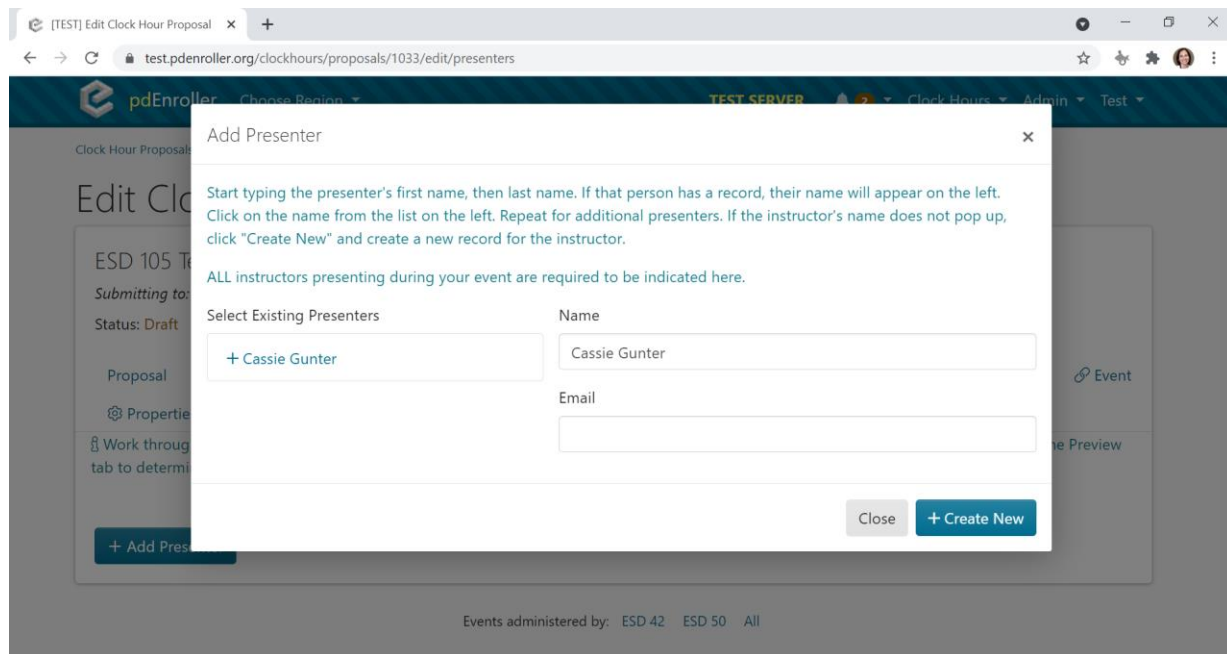
- If the presenters name does not appear on the left, click on the Create New button and create a new record for them.
- The presenter will be added with a *Missing Information* link next to their name. Click on the link to add the required information.
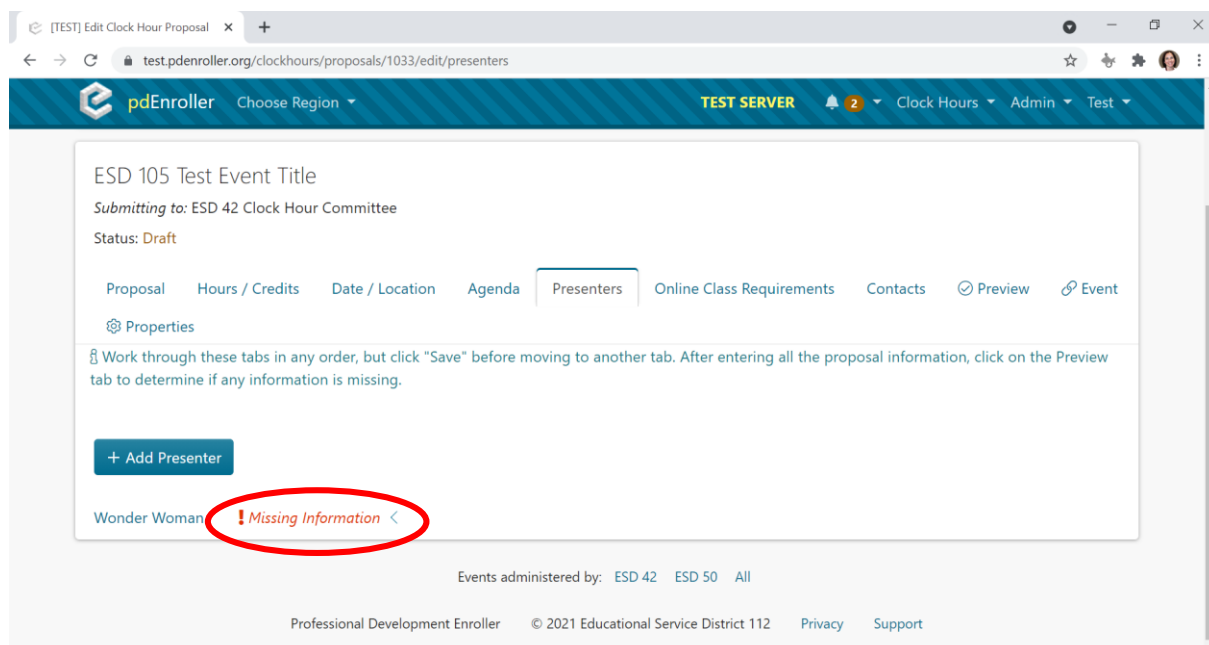
Contacts tab

- **Administrator Contact:** This is the person in your organization who approved or requested the proposal.
- Your Contact Info will automatically fill, but you can edit this information. This will be the person the approval committee can contact with any questions about the proposal.
- Click Save and move to the next tab.

Preview tab

- The preview tab will give you the opportunity to look over your proposal information one last time before submitting it for approval and flag any information that is not complete. If anything is flagged, it will require you to make changes before you can submit your proposal.
- On the Validation Checklist (see red circle), click on anything that does not have a green check mark next to it and make the necessary changes.
  - An information mark ⓘ just means FYI.
  - A question mark ⓘ means there might be something unusual and you should double check.
  - The exclamation mark ⚠ means information is not complete.
  - Green check mark ✓ means information is complete.

- Once the preview status shows that you have completed all the required information, the Submit for Approval button will be active. Click this button to submit your clock hour proposal to your approval committee.
- ***Once your proposal has been submitted for approval you will no longer be able to edit the event title, description, and dates.***

To return to your proposal to complete the next set of steps, click the Clock Hours button and choose Clock Hour Proposals. Your event will either be under the Drafts tab or the Pending tab.

Event tab

- Choose your Department
- Click the Add to Catalog button

- Click the "Complete event details and publish to the catalog here" link at the bottom of the screen.

- Much of the information in the Event tab will already be entered since you included it in the clock hour proposal. Work through each section and fill in the necessary details. See next page for more info.

- o *Primary Detail*
  - The Title, Subtitle, and Description will carry over from your clock hour proposal.
  - In the Notes section, you can add additional information that will display on the public catalog page, the attendee page, and in the email confirmation that registered participants will receive. An example of information you might enter is; "You will need a laptop or other mobile device for this training in order to access websites and download training materials."
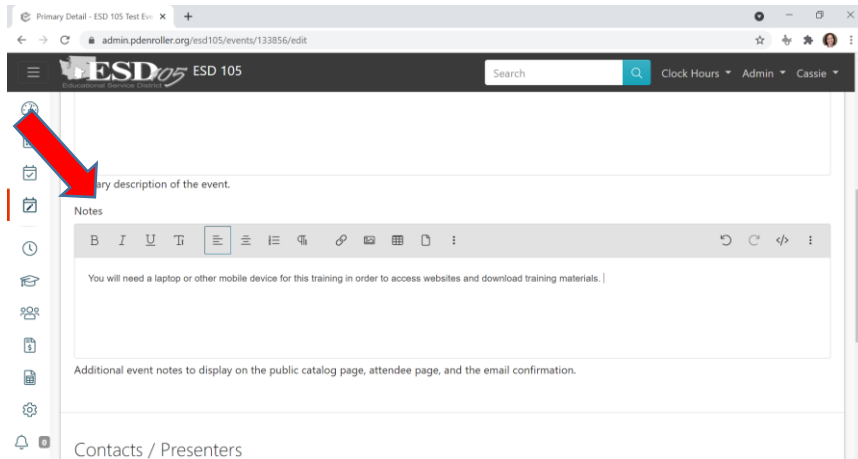
- In the Contacts/Presenters section;
- The **Presenter** you added in your clock hour proposal will carry over. You have the option to edit your presenter if needed. You can have more than one presenter listed.
- **Add Organizer** will default to the person who completed the clock hour proposal. This field can be edited. The organizer will have access to view the attendee page, but they will not be listed on the public catalog. You can have more than one organizer listed.
- **Add Primary Contact**: This is where you will want to add the person who will be the main point of contact for registration and event questions. You can have more than one primary contact listed.
- Under the Properties button, you can customize the visibility of each presenter, primary contact, and organizer.
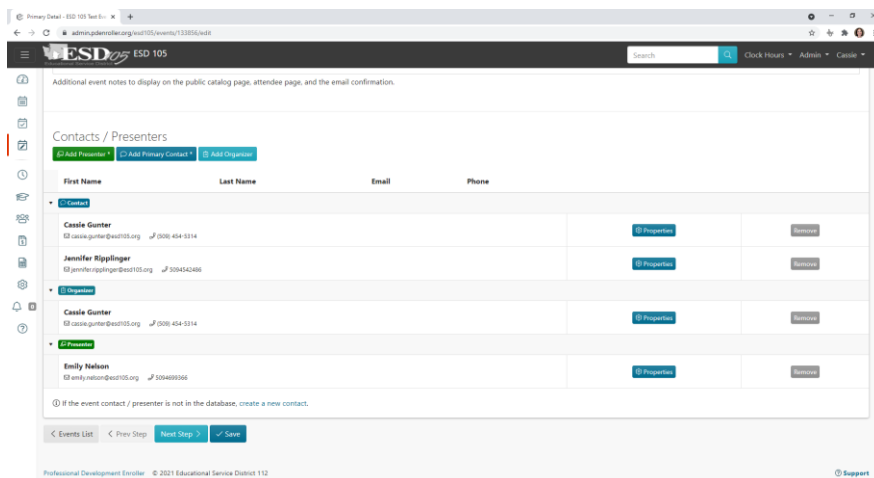
- ▪ Click Next Step

- o ***Dates and Location***
  - This information will auto populate from the clock hour proposal you submitted.

  - ▪ Click Next Step

- o ***Registration***
  - Choose your **registration start and ending dates**. You can also choose a time for your registration to start and end.
  - In the **Additional Registration Instructions** box, you have the option to add information to display below the "Register" button on the event page.
  - You can check the **Registration Requires Password** box and lock your event so only those with the password can register.
  - **Capacity** – choose the minimum and maximum attendees. If you choose a maximum, any registrations above the maximum number allowed, will go on a waiting list.
  - **Restrictions** – you can restrict your event to only allow certain members of a Co-op or organization to register. It your event is specific to a district; you would choose that district here.

  - ▪ Click Next Step

- o *Pricing*
  - Enter your **Base Price Per Attendee** – this is the registration fee.
  - Choose the **Ledger Account** the registration fee should go to.
  - **Adjustments/Coupons** – you can add additional fees, discounts, or coupon codes to your event.

    + Add Extra Fee This feature will allow you to add an additional fee on top of the initial registration fee (i.e. book fee)

    + Add Discount This feature will allow you to add a discount code, such as an early registration discount.

    + Add Coupon This feature will allow you to add a coupon code to decrease the registration fee, such as for a co-op.

- o *In the example below, I have added a **Fee** for the book that will be given to each participant. I have added a **Discount** for an Early Bird Special, so anyone who registers prior to June 30th, will have the book fee waived. I have added a **Coupon** so that anyone who registers from my Co-op, will have the registration fee waived. NOTE: The coupon code must reflect the amount of the discount. If registration is $50 and $30 for Co-op members, the coupon amount needs to be entered as $20 to reflect the amount of discount being given.*

- ▪ Click Next Step

- o ***Clock Hours***
  - Make sure Clock Hour Evaluation is listed as the Attendee Evaluation Form (it should default to this).
  - If your clock hour proposal has not yet been approved, you will see a warning that your clock hour proposal is in draft and clock hours will not appear on the event.

- ▪ Click Next Step

- o ***Tags***
  - The tags you chose on your clock hour proposal will copy over.

- ▪ Click Next Step

- o *Finalize and Publish*
  - Much like the Preview section when submitting clock hour proposals, the finalize page has an Event Checklist that will alert you to corrections. You cannot publish your event until all of the errors are corrected.

  - If no corrections are necessary, your screen will look like the one below.

  - **Public** – the event will be live for everyone to see. If the event is open only to those within the ESD 105 region, choose the ESD 105 catalog. If you are allowing participants outside of the ESD 105 region, choose Public Catalog.
  - **Hidden** – the event will not be displayed in the catalog and participants will need the *direct registration link* to register. *The link is in red on the sample page below.*
  - Choose the publication date and the date you want the event reminder email to be sent to registered participants.

  - **Click Publish**

Your event number is listed at the top of the screen. Once it has been approved by the clock hour committee, you will receive an email that it has been approved and your event will automatically publish to the catalog and be live for registrations.