

# New Innovations (RMS) Conferences Module Training: Intro & Setup



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## Intro to Conferences

New Innovations offers you a robust interface to manage conferences and didactic events for your program. Using the Manage Conferences page, you can create new conferences, manage existing conferences, take attendance and distribute conference surveys. This module allows you to set attendance requirements and generate attendance reports incorporating those standards.

There are many options available to you for scheduling and reporting the educational experiences your program offers, including:

- Building stand-alone or recurring conferences
- Building rosters with names of those who can be in attendance
- Attendees taking their own attendance using QR Code
- Assigning speakers
- Uploading attachments such as documents, PPT slide decks and links to websites pertaining to the conference topic
- Sending attendee and speaker notifications
- Distributing conference feedback surveys
- Creating reports about Attendance, Speakers and Surveys
- Configure Conferences to populate a resident or fellow work hour logs when marked present at a conference
- Create custom views of the calendar

## Access

The following privilege levels have access to Conferences:

Level 6 - Setup and maintain the Conference module

Level 5 - Setup and maintain the Conference module

Level 4 - Take attendance

Level 3 - View their own Conference calendar and attendance reports; Take their own attendance

Level 2 - View their own Conference calendar and attendance reports

Level 1 - N/A

## Glossary

**Attendance Requirements** - Create attendance requirements that are used during report generation.

**CLER Visits and Conferences** - The CLER Visit widgets (in the Sponsor and Program Administration pages) display attendance information for conferences that have been tagged with one of the six CLER focus areas. The CLER agents want to see evidence that the residents and faculty are being educated about fatigue management, patient safety and so on. To have that information displayed, check the CLER focus area that applies to this conference. You may check more than one. For more information about CLER focus areas, please see Administration > Sponsor Administration.

**QR Code** - Attendees can take their own attendance by scanning a QR code generated and displayed by the Conference administrator

**Recurring Conference** - Recurring conferences happen on a predictable date and time. For example, Journal Club may occur every Tuesday at noon. Within the software, you can enter one conference and create a recurring pattern for the entire year.

**Roster** - A roster is a list of conference attendees. Attendance records can be created for those on the roster.

**Speaker** - The conference speaker is the person presenting a topic at a conference.

**Stand-Alone Conference** - A stand-alone conference is a conference that occurs only one time.

**Survey** - Surveys can be sent to attendees to evaluate the content and speakers of your conferences

## **Before you begin:**

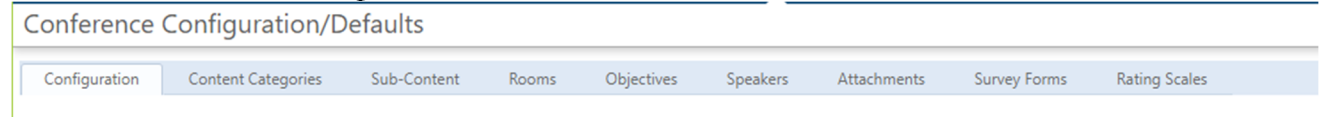
1. Make sure all trainees have a training record and all faculty have a Personnel profile if they are to be included on the conference roster
2. Make sure people are scheduled on the Block schedule so their rotation at the time of the conference is recorded on the roster
3. Create an assignment definition called 'Conference' if you want to have a trainee's conference attendance populate their work hour logs

## Setting Conference Details

For more information about this topic, please go to [Help>Tutorial Videos>Conferences- \[11.1\] Conferences-Setup](#)

Set up configuration defaults. These items are used regularly when creating conferences. Setting them up ahead of time is more convenient for you. These can be set up as you build out your conferences also.

Go [Conferences > Setup > Conference Details](#)



### Configuration Tab

**Default Location-** Select the default location from the dropdown list. This will be the location used for each conference unless you change it.

**Defaults for Conference Attendance Roster-** The roster is automatically built for you each time you create a conference whether it is a single instance or a series. Select the option that works best for you in the majority of conferences. The roster can always be rebuilt or the default changed as needed.

1. Click the link 'View/Edit Default Conference Roster Configurations' to view the options:
  1. Choose how to build the Roster:

**Option 1: Build Attendance Roster by Rotation and Status**  
This option uses the block schedule to build the roster. Select the rotations and statuses to include. When the conference is created, the system will look at the block schedule and only include the people with the selected statuses on the selected rotations. Example: Use this method if residents will always be excused from conferences while on a certain rotation.

**Option 2: Build Attendance Roster by Departmental Personnel**  
This option uses the statuses as listed on the Block Schedule and in the Personnel module to build the roster. Choose the statuses to include.

    1. Include People from My Divisions (if applicable) on Attendance Roster when it is automatically built. Check this box to include personnel from divisions within your department
    2. Allow level 4 users in Conferences for this department/division to Add and/or Remove people from attendance rosters. Check this box to permit Level 4 users, such as a Chief Resident/Fellow or administrator to take attendance

3. When taking attendance, show a default of \_\_\_\_ attendees on each page.  
Select the number of people to display on a page when taking attendance
2. Conferences and Work Hours - This feature links Conferences and Work Hours so that when a Trainee is marked present at a conference, a work hour log is automatically inserted in their records for the date and duration of the conference. Highlight the Trainee status types from the Statuses box that should have this feature enabled.

Note: For it to work correctly, there needs, to be an assignment definition configured for Conference setup and tied to the duty type Conference.

3. Auto-Login - Select 'Yes' to insert an auto-login link to Conference Surveys in the survey notification email.
4. Click Save Configuration

## **Content Categories Tab**

Creating Content Categories is optional but beneficial because they can be used to categorize common groups of conferences by category, like Grand Rounds or Journal Club. You can also use them to establish specific attendance criteria for content categories.

- 1. Go to the Content Categories tab**
2. Enter a name for the Content Category in the text box and click the Add New link. Repeat until all Content Categories have been created.
3. Each Content Category name must be unique

As you create them, Content Categories are listed in a table where they can be edited and deleted.

## **Sub-Content Tab**

Sub-Content Categories are optional. They are used to further define Content Categories. However, while you can use categories to group topics in an Attendance report, it is not possible to define attendance requirements by Sub-Content Category.

- 1. Go to the Sub Content tab**
2. Select a Content Category from the drop-down list
3. Enter a Sub-Content name in the text box, and click the Add New link. Repeat until all Sub-Content Categories have been created.
4. Each Sub-Content Category name must be unique.

As you create them, Sub-Content Categories are listed in a table where they can be edited and deleted

## **Rooms Tab**

Include the names of rooms where the conference will take place

- 1. Go to the Rooms tab**
2. Enter a Conference Room name
3. Click Add New
4. Repeat until all Conference Rooms have been added

## Objectives Tab

Add objectives to a conference

1. **Go to the Objectives tab**
2. Enter an Objective
3. Click Add New

## Speakers Tab

Maintain a list of speakers and their topics

1. **Go to the Speakers tab**
2. Change the date range if necessary
3. Select the conference from the drop-down list
4. Click on the blue link to add a speaker
5. Choose a person from the department or Filter list of People to include other department personnel. The person's email address should be populated.
6. Or Click Add New to enter a speaker who is not in the database. Enter the person's email.
7. Enter the speaker's topic
8. Send an email notification to the speaker? Select the Yes radio button
  1. You may include a link to NI and create a custom message
  2. Enter the Subject
  3. Enter the 'from' email address
  4. Send Copy: enter email address(es)
  5. Add Attachment for speaker, such as directions to the conference site
  6. Enter the number of days prior to the conference to send the notifications

## Attachments Tab

Add attachments to the conference for attendees to download and view.

**Attachments cannot exceed 12 MB.**

1. **Go to the Attachments tab**
2. Adjust the dates if necessary to find the correct conference
3. Highlight the name of the conference or hold down the Ctrl key to select more than one
4. Enter the name of the attachment
5. Click Select and browse for the attachment
6. Click on the attachment and then Open
7. Click Upload File

## Survey Forms Tab

1. **Go to Conferences > Surveys > Surveys Forms tab**
2. Click New
3. Enter a name
4. Click Save
5. Enter instructions in the designated area
6. Click Add Question
7. Enter the text of the question
8. To have the conference objectives appear on the form check the box 'Link this question to Conference Objectives'
  - 'Display all Objectives under this Question' lists all objectives for the conference in the question
  - 'Repeat this question for each Conference Objective' creates this question for each objective. If there are 3 objectives in the conference, this question will be repeated 3 times

## Responses

1. Select the appropriate response: None, New Response or Existing Response
2. Elect to display the responses horizontally or vertically on the page
3. Enter a label for each response choice
4. Enter a name for the response
5. If using an existing response, select the response from the drop-down list
6. Check the box to Include a comment box
7. Click Save

## Rating Scales Tab

1. **Go to the ratings scales tab**
2. Click the new link
3. Create your grade scale
4. Click Save

## Setting Attendance Requirements for Conferences

For additional information about this topic go to [Help>Tutorial Videos>Conferences- \[11.1\] Conferences-Setup](#)

### Overview

Administrators set up attendance requirements for their conferences. This allows the administrator to generate attendance reports that compare actual attendance rates against the attendance requirements. There are three options for establishing your attendance requirements.

Option 1 - Set the same requirement for all attendees for all conferences.

Example:

- All residents are required to attend 80% of all conferences in this department

Option 2 - Set different requirements based on the status of the attendee

Example:

- Residents with PRG-1 status are required to attend 100% of all department conferences
- Residents with PRG-2 status are required to attend 90% of all department conferences
- Residents with PRG-3 status are required to attend 80% of all department conferences

Option 3 - Set different requirements based on both status types and content categories.

Example:

- All personnel with PRG-1 status are required to attend 100% of all Journal Club conferences
- All personnel with PRG-1 status are required to attend 75% of all M & M conferences
- All personnel with PRG-2 status are required to attend 90% of all Journal Club conferences
- All personnel with PRG-2 status are required to attend 75% of all M & M conferences
- All personnel with PRG-3 status are required to attend 80% of all Journal Club conferences
- All personnel with PRG-3 status are required to attend 70% of all M & M conferences

## Set Up Attendance Requirements

1. Go to Conferences > Setup > Requirements
2. Select one of three options:
  - Set attendance percentage requirement for all department personnel
    - a) Enter a percentage
    - b) Click Save Departmental Requirement
  - Set Requirements by Status
    - a) Click Add New Requirement
    - b) Enter an attendance percentage requirement
    - c) Select the appropriate statuses
    - d) Click Save Requirement
  - Set Requirements by Status and Content Category
    - a) Click Add New Requirement
    - b) Enter an attendance percentage requirement
    - c) Select Content Categories
    - d) Select statuses
    - e) Click Save Requirement

Repeat the steps until all requirements are entered.

### Conference Attendance Requirements

You may set attendance requirements one of three ways:

1. Set a departmental percentage requirement that applies to all Status Types as they attend a conference of any Content Category.
2. Set percentage requirements for a given Status Type as they attend any conference.
3. Set percentage requirements for a given Status Type as they attend conferences of a particular Content Category.

**Option 1: Set Requirements with a Departmental Percentage:**

I want to require all personnel to attend % of all conferences they are scheduled to attend in my department/division.

[Save Departmental Requirement](#)

**Option 2: Set Requirements by Status Type:**

There are currently no attendance percentages set by Status Types. Adding one will remove any existing percentages already set by this department/division.

[Add New Requirement](#) | [Delete Selected Requirements](#)

**Option 3: Set Requirements by Status Type and Content Category:**

There are currently no attendance percentages set by Content Category and Status Types. Adding one will remove any existing percentages already set by this department/division.

[Add New Requirement](#) | [Delete Selected Requirements](#)

## Creating Conferences

For more information about this topic go to [Help>Tutorial Videos>Conferences- \[11.2\] Create a Conference](#)

Conferences can be created as 'Stand Alone', which is just one conference or a recurring series that repeats in a set pattern for a specified period of time.

Notes:

- When the dates of a recurring conference do not occur in a regular pattern, the Recurring option cannot be used. Create a stand-alone conference for each instance.
- It is recommended that Categories be used in conferences that have Attendance Requirements configured. This makes Attendance reports much easier to interpret.
- If you add a note when you create the series, it copies to each conference. However, if you add a note to an existing conference, the note only appears for that one conference.

If you want to add a note and have it appear for the rest of the conference series do this:

1. Select the conference
2. Add the note
3. Check the box to 'Apply changes to other conferences in the series'
4. Save
5. Check the Main column for each conference to add the note to
6. Save. Please note: you can only do this for conferences that occur in the future. If you want the note to appear for past conferences, you will have to add those individually.

## Create a Conference

1. Go to Conferences > Manage Conferences > Add
2. Enter the Name of the conference
3. Select the Content Category and Sub Content. New categories can be added by clicking the green icon
4. Select Room. Check availability of the room by clicking the blue icon.
5. Select Training Location
6. Enter Credit or Other Credit Hours and Curriculum Code
7. Add Notes (the notes appear on every conference in the recurring series)

The screenshot shows the 'Conference Editor' interface with the following fields and options:

- Main** (selected tab):
  - Name: New (untitled) Conference
  - Content Category: ---
  - Sub Content: ---
  - Room: ---
  - Training Location: Aultman Hospital
  - Credit Hours: 0
  - Other Credit Hours: 0
  - Curriculum Code: [empty]
  - Notes: [empty text area, Remaining Characters: 2,000]
- Scheduling** (sub-panel):
  - Recurring
  - Date: 4/25/2013
  - Time: 3:49 PM
  - Duration: 0:00 hours:minutes
- Additional Options** (sub-panel):
  - Make conference required for attendance statistics
  - Include on people's "My Schedule"
  - Add this conference to the Duty Hour logs of attendees marked Present using this assignment definition: ---

## Scheduling

1. Stand Alone - enter the date, start time and duration of the conference if the conference is a stand alone
2. Recurring Series - check the box for recurring
  - a. Enter the date range or choose an academic year
  - b. Enter the start time and the duration
  - c. Choose the recurring pattern
    - Daily - The conference will be created on Monday-Friday for the date range.
    - Weekly - The conference will be created every x week(s) on the day selected for the date range. Example: Every 2 weeks on Tuesday is every other Tuesday.
    - Monthly - The conference will be created every month on a specified date or day for the date range. Example: The First

Tuesday of every 2 months is the first Tuesday of every other month.

### Additional Options

1. Check Make conference required in attendance statistics to make this a required conference and have the conference counted in the attendance requirements
2. Include this conference on people's "My Schedule" displays this conference on the attendee's My Schedule view in Scheduling-Assignment
3. Add this time to peoples Duty Hour logs records the conference time in an attendee's duty hour logs if the person is marked present at the conference. Usually, an assignment definition called Conference is created for use here.

### Speaker Tab

1. **Click the Speaker tab**
2. Click Add Speaker
3. Select a speaker from the drop-down list. Click Add New to add a new person not in the database
4. Enter the speaker's topic
5. Check the box to send an email notification to the speaker.
  - a. Enter the speaker's email address
  - b. You may enter a custom message or use the default message.
  - c. Enter the number of days prior to the conference date that the email should be sent.
  - d. To add multiple reminders, click the link to Add Another Notification
6. Click Add Speaker

**Conference Editor**

Grand Rounds

Main **Speakers** Attachments Links Attendee Notifications Competencies/Objectives Survey Settings

Speaker:   [Enter new speaker](#) | [Filter available speakers](#)

Topic:   
Max Characters: 500

Send email notification to this speaker?

Apply changes to other conferences in this series

## Attachment Tab

1. **Click the Attachments tab**
2. Fill in the attachment name
3. Click Select to locate the document; when document is selected, click Open. Attachments can be up to 12MB each; there can be more than one attachment per conference. Attachments larger than 12MB will not load.
4. Enter the name of the attachment and click Upload
5. Option to apply this attachment to other conferences in the recurring series
6. Click Save

**Conference Editor**

Main Speakers **Attachments** Links Attendee Notifications Competencies/Objectives Survey Settings

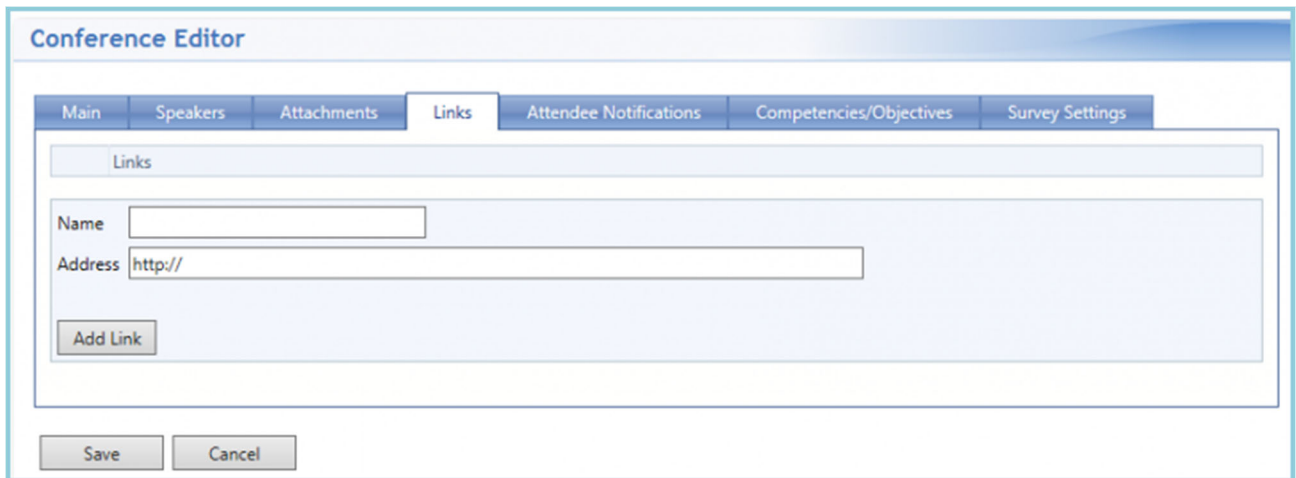
Attached Files

Click **Select** to choose a file and click **Upload** to attach

Descriptive Name:  (optional)

## Links Tab

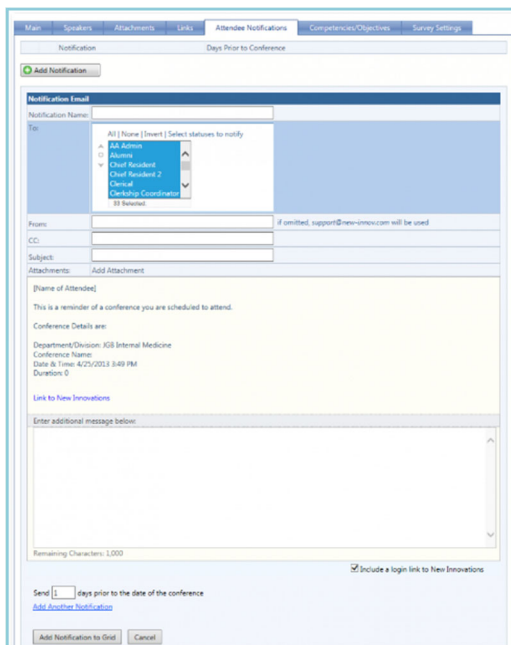
1. Click the **Links** tab
2. Type a name for the link
3. Type or paste the link in the Link Address text.
4. Test the link to make sure it works
5. Click Save



The screenshot shows the 'Conference Editor' interface with the 'Links' tab selected. The interface includes a header bar with the title 'Conference Editor' and a series of tabs: 'Main', 'Speakers', 'Attachments', 'Links', 'Attendee Notifications', 'Competencies/Objectives', and 'Survey Settings'. Below the tabs is a section titled 'Links' containing a form with two input fields: 'Name' and 'Address'. The 'Address' field contains the text 'http/'. Below the form is an 'Add Link' button. At the bottom of the interface are 'Save' and 'Cancel' buttons.

## Attendee Notification Tab

1. Click the Attendee Notification tab
2. Enter the Customize Email Notification Details:
  - a. Enter a Name for this Notification
  - b. Enter the Subject of the Email
  - c. Enter a from address. This is the email address where replies will be directed
  - d. Include default message – Include a link to New Innovations (optional)
  - e. Include a custom message instead of using the New Innovations message
3. Click Add Attachment to include a document that can be forwarded to the attendees
4. Select the appropriate statuses to receive the email. Use the Ctrl key to select multiple statuses
5. Enter the number of days a notification should be sent prior to the conference
  1. Add further notifications
  2. Apply this attendee to additional conferences
6. Click Save or Save and Remain to associate this notification with multiple conferences in the recurring series



The screenshot shows a web-based interface for configuring an attendee notification. At the top, there are tabs for 'Main', 'Speakers', 'Attachments', 'Links', 'Attendee Notifications', 'Competencies/Objectives', and 'Survey Settings'. The 'Attendee Notifications' tab is active, showing a 'Notification' section with a 'Days Prior to Conference' dropdown and an 'Add Notification' button. Below this is a 'Notification Email' section with a 'Notification Name' field and a 'To:' field containing a list of roles: 'All | None | Overst | Select statuses to notify'. The 'From:' field is empty, with a note that 'support@new-innov.com will be used' if omitted. The 'Subject:' field is empty. There is an 'Add Attachment' button. The main body of the notification is a yellow box containing the text: '(Name of Attendee) This is a reminder of a conference you are scheduled to attend. Conference Details are: Department/Division: JGB Internal Medicine, Conference Name: , Date & Time: 4/25/2013 3:49 PM, Duration: 0. Below this is a 'Link to New Innovations' section with a text area for 'Enter additional message below'. At the bottom, there is a 'Remaining Characters: 1,000' indicator, a checkbox for 'Include a login link to New Innovations' which is checked, and a 'Send' field with a dropdown set to '1' days prior to the date of the conference. There are 'Add Notification to Grid' and 'Cancel' buttons at the very bottom.

## **Competencies and Objectives Tab**

### **CLER Focus Areas**

The CLER Visit widgets in the Sponsor and Program Administration pages display conferences about the six CLER focus areas that have been attended by residents and faculty. To have that information displayed, check the CLER focus area that applies to this conference.

### **Competencies and Objectives**

Click the Competencies/Objectives tab. Check the competencies that apply to the conference. Objectives can be associated with competencies and then the objectives can be included in a survey.

Any competencies applied to conferences will appear in the Core Competency Report

#### **1. Click Add Objectives**

2. Check the appropriate objectives and then click 'Add Selected Objectives'
3. Click the Add New Objectives link to enter a new objective
4. Click Save
5. Check the new objective
6. Click Add Selected Objectives

### **Applying Competencies and Objectives to other conferences in the series**

You can add just the competencies to other conferences by selecting 'Apply Competencies Only'. Or you can add the Competencies and the associated Objectives.

1. Select the option 'Apply Objective-Competency Associations'
2. Check the 'Apply changes to other conferences in this series'
3. Click the Save button
4. If any of the items that will be added to other conferences in the series have the same name as the item you are adding, you will be asked whether you'd like to replace the existing item or keep it.
5. Check any additional items to include
6. Click Save

**New Innovations**

Conference 1

Main | Speakers | Attachments | Links | Attendee Notifications | **Competencies/Objectives** | Survey Settings

**CLER Focus Areas**

Patient Safety     Quality Improvement  
 Transitions in Care     Professionalism  
 Well-Being     Supervision

**Core Competencies**

Patient Care     Professionalism  
 Medical Knowledge     Interpersonal and Communication Skills  
 Systems-Based Practice     Osteopathic Philosophy and Osteopathic Manipulative Medicine  
 Practice-Based Learning and Improvement

Objective	PC	MK	SBP	PBLI	PRO	ICS
obj 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
obj 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## Viewing Conference Rosters

The View Roster feature provides no editing capabilities. It simply provides a view of the people assigned to a specific Conference along with their Status Types and Department/Division membership. If they are assigned to a Primary Rotation on the day of the Conference, that Rotation will be listed as well.

Conference Attendance Roster						
Morning Report						
3/28/2017 7:00 AM - 3/28/2017 8:00 AM						
<a href="#">Edit</a>   <a href="#">Add People</a>   <a href="#">Remove People</a>   <a href="#">Edit Roster Configuration</a>   <a href="#">Rebuild Roster Now</a>						
<a href="#">All Present</a>   <a href="#">All Tardy</a>   <a href="#">All Excused</a>   <a href="#">Clear All</a>   <a href="#">Save</a>						
Present	Tardy	Excused	Name	Status	Dept./Div.	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DuPuy, Ray	PRG 3	Emergency Medicine	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Grayson, Bernie	Faculty	Emergency Medicine	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Iogistiani, Roberto	Faculty	Emergency Medicine	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Krispo, Lew	Faculty	DM-Endocrinology	

To take attendance, add or remove people from the roster, click Take Attendance or Add/Remove People from Roster

To change the roster by editing the default configuration that created it, click Edit Roster Configuration & Rebuild Roster Automatically

1. **Go to Conferences > Manage Conferences**
2. Optional: Enter dates and click Update to restrict the Conferences listed to just those that occur within a specific date range
3. Optional: Use the Search Feature to locate the specific Conference you would like to edit.
4. Click the conference you want to see the roster for
5. Click Roster
6. Click View Roster

## Create and Distribute Conference Surveys

For more information about this topic go to [Help>Tutorial Videos-Conferences- \[11.6\] Conferences-Surveys](#)

### Overview

Surveys are used to collect feedback about the content and speakers of your conferences. Administrators create survey forms and add them to a conference. Any number of forms can be created and distributed to conference attendees by status type when applicable. Emails can be sent to conference attendees notifying them that the surveys are available online.

Notes:

- Surveys without questions on them, or questions with no rating responses, cannot be used.
- Surveys that have been attached to a conference can be edited until someone completes the survey. Then the form can be viewed but not edited.
- Multiple surveys can be linked to a conference by clicking Add “Another Survey Form and selecting another form from the list. Then select the status or statuses of the people who should receive the new form. Multiple statuses can be assigned to more than one form.

### Default Conference Survey Forms

Go to Conferences > Surveys > Survey Forms to view the two survey forms already created for you to use. These can be edited or you can create your own survey form.

### Create a New Survey Form

1. **Go to Conferences > Surveys > Surveys Forms tab**
2. Click New
3. Enter a name
4. Click Save
5. Enter instructions in the designated area
6. Click Add Question
7. Enter the text of the question
8. To have the conference objectives appear on the form check the box 'Link this question to Conference Objectives'
  - a. 'Display all Objectives under this Question' lists all objectives for the conference in the question
  - b. 'Repeat this question for each Conference Objective' creates this question for each objective. If there are 3 objectives in the conference, this question will be repeated 3 times

## Responses

1. Select the appropriate response: None, New Response or Existing Response
2. Elect to display the responses horizontally or vertically on the page
3. Enter a label for each response choice
4. Enter a name for the response
5. If using an existing response, select the response from the drop-down list
6. Check the box to Include a comment box
7. Click Save

## Add a Survey to a Conference

1. **Go to Conferences > Manage Conferences**
2. Click on a conference
3. Click Edit
4. Click the Survey Settings tab to add a survey to a conference
5. Select the appropriate survey from the drop-down list
6. Choose who should receive the form by status

## Date Options

1. Enter the number of days after the conference that the survey will be available
2. Enter the number of days after the conference that the completed survey is due

## Survey Distribution

Choose whether the survey should be distributed to the entire roster or only those that have been marked present on the attendance roster. If you choose to distribute to 'only those marked as present', those people will *not* have the option to 'skip' the survey. This applies to manual attendance taking or attendance taken using QR Codes.

- Distribute to all people on the roster, whether they attended the conference or not
- Distribute to only those people marked present on the roster

## Attendee Emails

Notifications and reminders can be sent to people with Surveys to complete.

1. Check to have emails sent to attendees when the survey is available Immediately after the conference
2. In consolidated daily email
3. Check to have reminders sent to people who have not completed the survey by the due date
4. You may also send a recurring email reminder. Enter how often the reminder should be sent

## Administrative Emails

You can send conference attendees an email to let them know when the survey is available for completion. You can choose to send this email immediately after the conference ends or include it in the consolidated email the day after the conference.

You can also send reminders to people who have not filled out the survey by the due date. This email is sent in the pattern selected, such as every 3 days, and is included in the daily-consolidated email.

Administrators can receive an email confirming the attendees have been notified of the survey availability. They can also receive an email with a list of people who have not yet completed a survey by its due date.

1. Check to receive an email when initial emails are sent
2. Check to receive an email with a list of people who have not completed surveys by the due date
3. Enter the email address of the person to receive these emails
4. Click Save Survey Settings

## **Add Survey to More Conferences in the Series**

1. Before saving the conference, check the box to Apply changes to additional conferences in the series
2. Check those that should have the survey linked to it
3. Click Apply

## **Completing Surveys**

Once the survey settings are saved, the survey will be available at the conference end time. If enabled, attendees can receive an email notifying them that the survey is available. A link to the survey is also provided in the Notifications panel of each attendee's Home Page that takes them to the list of pending surveys they have been asked to complete.

If an attendee is unable to complete the survey before it expires, the expiration date in the survey setup can be adjusted to make the survey available again. Just change the accessible date in the conference survey settings for that particular date and save.

Administrators can also complete a survey for an attendee by going to Conferences > Surveys > Survey Status and clicking Complete next to the appropriate survey.

## **Speakers**

Speakers can view surveys about them but they are anonymous. Administrators can see who completed the survey. The only exception is when the administrator is also the speaker. In that event, the administrator cannot view the name of the people who filled out surveys.