

New Innovations (RMS) Conference FAQs



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Table of Contents

FAQ: QR codes don't work with Single Sign On	2
FAQ: How can I remove surveys attached to conferences?	2
FAQ: How can I allow residents and fellows to take their own attendance?	2
How Residents Take Their Own Attendance	2
Update a Resident or Fellow's Privileges	2
Update Multiple Residents or Fellows' Privileges.....	2
FAQ: On the Attendance Report, how can the Attendance Percentage be more than 100%?.....	3
FAQ: How do I clean up my Speaker list?	3
FAQ: Can I excuse someone from a Conference when they are on a specific rotation?.....	4
FAQ: Since I am an administrator, can I complete a conference Survey on behalf of someone else?	5
FAQ: I want my Chief Resident to take conference attendance. How do I set that up?	5
FAQ: Can I add one survey for residents and a different one for Faculty?.....	6
FAQ: Does the speaker get a conference survey?	6
FAQ: How do I mark someone as 'Absent' for a conference?	6
Attendance by Conference Tab	6
Attendance by Person Tab.....	7
FAQ: Why isn't there a Category in the 'Attendance Report by Person?'	8
FAQ: How can my residents see the conference schedule on their phones?	9
FAQ: How can I make a conference calendar with only certain conference details on it?	9
FAQ: Why can't I get a report of my Faculty showing Attendance Requirements?	9
FAQ: Can I put the conference calendar on my home page?	10
FAQ: What data is included in the Survey Compliance Report?.....	10
Create the Assignment Definition.....	11
Configure the Conference to Add a Work Hour Log	11
FAQ: I have more than one speaker. How do I send a survey for each one?	12
FAQ: 'Survey Response' Conference Surveys doesn't show results for a speaker	12
FAQ - How do I cancel a previously scheduled conference?	12
FAQ - How can I preview a conference survey form?.....	12
FAQ - What does the question mark next to a name on a conference roster mean?.....	13

FAQ: QR codes don't work with Single Sign On

Most databases using SSO (single sign on) cannot use the QR codes because of the sign-on validation. However, databases using SAML type of SSO **can use the QR code**.

If you have questions about the type of SSO your database uses, please contact your IT Department.

Technical questions about receiving error messages or inability to connect should be submitted via a support ticket.

FAQ: How can I remove surveys attached to conferences?

1. Go to *Conferences > Manage Conferences*
2. Select the conference that you would like to remove surveys from
3. Click **Survey Settings** in the lower right
4. Click **Delete Survey Settings** in the lower right of the survey settings window that pops up
5. If you would like to apply this to all conferences in the series, check the box labeled Apply changes to other conferences in this series. When you click Save, you will be presented with a list of all future conferences in the series. Review the SRVY column to be sure the ones you want to change are checked. Conferences in the past are not affected.
6. Click **Save**
7. If surveys have already been completed for this conference, they will still be shown in the lower right corner. Click **Delete All** to remove these as well.

FAQ: How can I allow residents and fellows to take their own attendance?

Residents and Fellows need level 3 privileges in Conferences in order to take their own attendance.

Note:

The attendance page must still be saved by an Administrator for attendance to be counted. Any resident or fellow who has not yet taken their attendance will be marked absent when this page is saved. If a person is considered absent (no check box marked) and eventually records their attendance, the page needs to be re-saved.

How Residents Take Their Own Attendance

1. Go to *Conferences > My Attendance*
2. Adjust the date range if needed and click **Update List**
3. Mark the correct attendance option: Present, Tardy, Excused
4. Leave the row empty if absent from the conference
5. Click **Save**. Do this every time you exit the page

Update a Resident or Fellow's Privileges

1. Go to *Personnel > Personnel Records*
2. Select a resident's record
3. Click **Security & Privileges**
4. Click **Edit** next to the resident's existing privileges
5. Check the box for Level 3 in the Conferences row
6. Click **Save and Return**

Update Multiple Residents or Fellows' Privileges

1. Go to *Personnel > Manage Multiple Records > Privileges*
2. Select **Add Privileges**
3. Select the appropriate department

4. Select the Resident work role and statuses
5. Click **Display Available People**
6. Check the level 3 block for the Conferences row
7. Click **Update Privileges**

FAQ: On the Attendance Report, how can the Attendance Percentage be more than 100%?

If a resident attends a conference that she was already marked as 'Excused' from on the roster, it can skew the attendance results. It's like they're given extra credit for attending a conference that they didn't need to. The Conference attendance percentage is calculated by using the following formula:

Number Present

Number Required - Number Excused

Example:

Dr. Patel was required to attend 84 conferences. She attended 80 of these conferences and was excused from 1 of them. The formula would appear as $80 / (84 - 1) = 96.4\%$.

However, if she attended all 84 of the conferences, even the one she was excused from, her calculation would be $84 / (84 - 1) = 101.2\%$

Solution:

If you don't want to see percentages that are more than 100%, edit the attendance for that resident and uncheck the box for 'Excused.'

FAQ: How do I clean up my Speaker list?

There may be times when you have someone displaying on your Speaker Report with different versions of their name. In the example below, Dr. Wolf is shown as both Dr. Becky Wolf and Dr. Rebecca Wolf.

Baker, Thomas Eugene	FM-Family Medicine::Journal Club	Journal Club
Beres, Amanda	FM-Family Medicine::Journal Club	Journal Club
Martin, Cassidy	FM-Family Medicine::Journal Club	Journal Club
Wolf, Becky	FM-Family Medicine::Journal Club	Journal Club
Wolf, Becky	FM-Family Medicine::Journal Club	Journal Club
Wolf, Rebecca	FM-Family Medicine::Journal Club	Journal Club

In order to clean up the list and combine the statistics for this person, follow the steps below:

1. Go to *Conferences > Setup > Conference Details > Speakers*
2. Adjust the date range, if necessary, and click **Update List**
3. Click **Edit** in front of the name you want to change
4. Make your changes
5. Click **Save**

Now all of the statistics for the person will be combined on the Conference Reports.

Note:

To prevent this from happening again, always check the existing lists of Speakers when adding their name to a Conference, rather than typing in their name again

FAQ: Can I excuse someone from a Conference when they are on a specific rotation?

You can automatically excuse someone from a conference when they are scheduled on a specific Assignment but not when they are scheduled on a specific Rotation. You can manually excuse someone from a conference on the Attendance list.

To mark a person as 'Excused' from a conference:

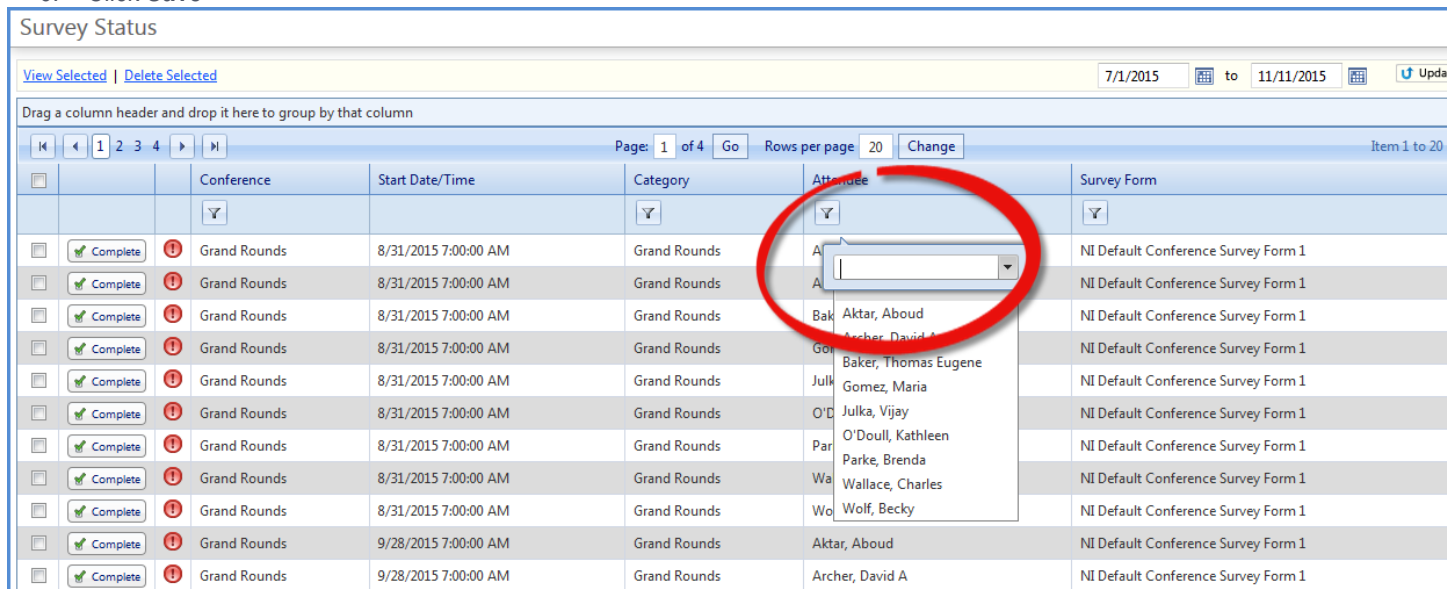
1. Go to *Conferences > Record Attendance*
2. Adjust the date range, if necessary, and click **Update list**
3. Click on a conference
4. Check the 'Excused' box beside the person's name
5. Click **Save**

Conference Attendance Roster						
Grand Rounds						
7/20/2015 7:00 AM - 7/20/2015 9:00 AM						
Edit Add People Remove People Edit Roster Configuration Rebuild Roster Now						< (07/20/
All Present All Tardy All Excused Clear All Save						
Present	Tardy	Excused	Name	Status	Dept./Div.	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Archer, David A	PRG 1	FM-Family Medicine	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Wolf, Becky	PRG 1	FM-Family Medicine	
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Aktar, Aboud	PRG 2	FM-Family Medicine	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Julka, Vijay	PRG 2	FM-Family Medicine	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	O'Doull, Kathleen	PRG 2	FM-Family Medicine	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Parke, Brenda	PRG 2	FM-Family Medicine	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Baker, Thomas Eugene	PRG 3	FM-Family Medicine	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Gomez, Maria	PRG 3	FM-Family Medicine	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Wallace, Charles	PRG 3	FM-Family Medicine	

FAQ: Since I am an administrator, can I complete a conference Survey on behalf of someone else?

Yes, you can complete a survey for someone by using the Survey Status List.

1. Go to *Conferences > Survey Status*
2. Adjust the date range, if necessary, and click **Update**
3. Optional: Use the Filter icons above the columns to narrow your search
4. Click **Complete** in front of the survey you want to complete
5. Answer the questions
6. Click **Save**



		Conference	Start Date/Time	Category	Attendee	Survey Form
<input type="checkbox"/>	<input type="checkbox"/>	Grand Rounds	8/31/2015 7:00:00 AM	Grand Rounds	A	NI Default Conference Survey Form 1
<input type="checkbox"/>	<input type="checkbox"/>	Grand Rounds	8/31/2015 7:00:00 AM	Grand Rounds	A	NI Default Conference Survey Form 1
<input type="checkbox"/>	<input type="checkbox"/>	Grand Rounds	8/31/2015 7:00:00 AM	Grand Rounds	Bak	NI Default Conference Survey Form 1
<input type="checkbox"/>	<input type="checkbox"/>	Grand Rounds	8/31/2015 7:00:00 AM	Grand Rounds	Go	NI Default Conference Survey Form 1
<input type="checkbox"/>	<input type="checkbox"/>	Grand Rounds	8/31/2015 7:00:00 AM	Grand Rounds	Julka	NI Default Conference Survey Form 1
<input type="checkbox"/>	<input type="checkbox"/>	Grand Rounds	8/31/2015 7:00:00 AM	Grand Rounds	O'D	NI Default Conference Survey Form 1
<input type="checkbox"/>	<input type="checkbox"/>	Grand Rounds	8/31/2015 7:00:00 AM	Grand Rounds	Par	NI Default Conference Survey Form 1
<input type="checkbox"/>	<input type="checkbox"/>	Grand Rounds	8/31/2015 7:00:00 AM	Grand Rounds	Wa	NI Default Conference Survey Form 1
<input type="checkbox"/>	<input type="checkbox"/>	Grand Rounds	8/31/2015 7:00:00 AM	Grand Rounds	Wo	NI Default Conference Survey Form 1
<input type="checkbox"/>	<input type="checkbox"/>	Grand Rounds	9/28/2015 7:00:00 AM	Grand Rounds	Aktar, Aboud	NI Default Conference Survey Form 1
<input type="checkbox"/>	<input type="checkbox"/>	Grand Rounds	9/28/2015 7:00:00 AM	Grand Rounds	Archer, David A	NI Default Conference Survey Form 1

FAQ: I want my Chief Resident to take conference attendance. How do I set that up?

You can set up the conferences individually to allow a person other than an administrator to take attendance:

A. Configure the conference:

1. Go to **Conferences > Setup > Conference Details**
2. Check the box to 'Allow level 4 users in Conferences for this department/division to Add and/or Remove people from attendance rosters.'
3. Click **Save Configuration**

B. Give the Chief Resident Level 4 Privileges in Conferences

1. Go to **Personnel > Personnel Records**
2. Find the Chief in the personnel dropdown list
3. Click **Security and Privileges**
4. Click **Edit**
5. Check the box for L4 in the Conferences Row.
6. **Save and Return**

A "4" should appear in the CF (short for conferences) column as an indication that the trainee has Privileges in that module.

FAQ: Can I add one survey for residents and a different one for Faculty?

Yes, more than one survey can be added to a conference and assigned by status.

1. Go to *Conferences > Manage Conferences*
2. Highlight the conference and click the Edit icon on the task bar
3. Go to the Survey Settings tab
4. Select the first survey from the form dropdown list
5. Select the statuses that should get this survey
6. Click Add **Another Survey Form**
7. Select the next form
8. Select the statuses that should get this form
9. Continue setting up the due date and email options
10. **Save**

FAQ: Does the speaker get a conference survey?

The speaker will receive a survey if you put that person on your roster. The speaker will then get the survey in the same manner that the rest of the roster receives it.

FAQ: How do I mark someone as 'Absent' for a conference?

When taking conference attendance, there is no column labeled as 'Absent.' However, if a resident is not marked as Present, Tardy or Excused, they are then assumed to be 'Absent.' Below you'll find two ways to record that the resident did not attend a conference:

Attendance by Conference Tab

1. Go to *Conferences > Record Attendance*
2. Click the **Attendance by Conference** tab
3. Adjust the date range, if necessary, and click **Update List**
4. Select a conference from the list
5. Check the appropriate box for Present, Tardy and Excused. Any conference with no check marks will record as 'Absent'
6. Click **Save**

Note: Even if no person was in attendance, you must click **Save** to mark them all as 'Absent.'

Conference Attendance Roster

Journal Club

11/11/2015 12:00 PM - 11/11/2015 1:00 PM

[Edit](#) | [Add People](#) | [Remove People](#) | [Edit Roster Configuration](#) | [Rebuild Roster Now](#)

< (11/11/2015) Journal Club | [Attend](#)

[All Present](#) | [All Tardy](#) | [All Excused](#) | [Clear All](#) | [Save](#)

Total Attendees: 10 - Attendees

Present	Tardy	Excused	Name	Status	Dept./Div.	Primary Rotation
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Archer, David A	PRG 1	FM-Family Medicine	FM:Geri-PCMH
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Wise, Craig	PRG 1	FM-Family Medicine	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Wolf, Becky	PRG 1	FM-Family Medicine	FM:ComMed-SC
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Aktar, Aboud	PRG 2	FM-Family Medicine	FM:Derm-SC
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Julka, Vijay	PRG 2	FM-Family Medicine	FM:MedA-SC
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	O'Doull, Kathleen	PRG 2	FM-Family Medicine	FM:Card-SC
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Parke, Brenda	PRG 2	FM-Family Medicine	FM:Derm-SC
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Baker, Thomas Eugene	PRG 3	FM-Family Medicine	FM:AmbGyn-SC
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Gomez, Maria	PRG 3	FM-Family Medicine	FM:MedC-SC
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Wallace, Charles	PRG 3	FM-Family Medicine	FM:MedB-SC

Attendance by Person Tab

1. Go to *Conferences > Record Attendance*
2. Click the **Attendance by Person** tab
3. Select a person
4. Adjust the date range, if necessary, and click Update List
5. Check the appropriate boxes for Present, Tardy and Excused. Any name with no check marks will record as 'Absent'
6. Click **Save**

Log My Attendance

Attendance By Conference | Attendance By Person

Record Attendance for: Julka, Vijay [Filter People](#)

Conferences From: 9/11/2015 To: 11/11/2015 [Update List](#)

Show Only Required Conferences (Those counting toward attendance statistics)

Conferences Attendance being taken for: Julka, Vijay

[All Present](#) | [All Tardy](#) | [All Excused](#) | [Clear All](#) | [Save](#)

Present	Tardy	Excused	Name	Date	Content Category	Sub Content
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Journal Club	11/11/2015 12:00 PM	Journal Club	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Grand Rounds	11/9/2015 7:00 AM	Grand Rounds	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Journal Cluc	11/4/2015 12:00 PM	Journal Club	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Grand Rounds	11/2/2015 7:00 AM	Grand Rounds	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Journal Cluc	10/28/2015 12:00 PM	Journal Club	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Grand Rounds	10/26/2015 7:00 AM	Grand Rounds	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Journal Cluc	10/21/2015 12:00 PM	Journal Club	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Grand Rounds	10/19/2015 7:00 AM	Grand Rounds	

FAQ: Why isn't there a Category in the 'Attendance Report by Person?'

When you see a blank space in the Category column of this report, it means there was no Content Category designated for that conference.

Attendance Report by Person									
Date Range: 7/1/2015 - 11/11/2015									
Totals:									
Person	Dept/Div	Status	Category	# Conferences	# Required	Present	Tardy	Excused	% Attendance
Aktar, Aboud	Department of Family Medicine/FM-Family Medicine	PRG 2		1	1	1	0	0	
			Department of Emergency Medicine/Emergency Medicine :: Simulation Lab	1	1	0	0	0	
			Department of Family Medicine/FM-Family Medicine :: Grand Rounds	1	1	1	0	0	
Totals:				3	3	2	0	0	

Take the steps below to correct this situation:

1. Go to *Conferences > Manage Conferences*
2. Select the conference
3. Click **Edit Details**
4. In the Content Category field:
 - a. Select an item or
 - b. Click the **Plus Sign** to create a new Content Category
5. Click **Save**

The screenshot shows the 'Conference Editor' interface for a conference titled 'Grand Rounds'. The 'Content Category' dropdown menu is highlighted with a red circle and contains a plus sign, indicating it is empty. Other fields include 'Sub Content', 'Room' (Rositer Dining Room), 'Training Location' (St. Christopher Medical Center), 'Credit Hours' (0), 'Other Credit Hours' (0), 'Curriculum Code', 'Date' (7/6/2015), 'Time' (7:00 AM), 'Duration' (2 hours 0 minutes), and 'Recurring Series' (Date Range: 7/1/2015 to 6/30/2016, Academic Year: 2015-2016).

FAQ: How can my residents see the conference schedule on their phones?

Make sure the conference configuration includes the option to include on People's 'My Schedule' view

1. Go to **Conferences > Manage Conferences**
2. Highlight the conference and click the **Edit** icon in the task bar
3. On the Main tab, check the box "Include on People's 'My Schedule'"
4. **Save**

Now have residents download the iCal option in Assignment Schedules

1. Go to **Schedules > My Schedule**
2. Click the link to **Subscribe to My Schedule**
3. Accept the terms and click **Create iCalendar Link**
4. Click the link to the calendar of choice
5. Click **Return to Schedule**

FAQ: How can I make a conference calendar with only certain conference details on it?

Create a Custom View to limit what appears on the calendar.

1. Go to *Conferences > Calendar*
2. Click the green **+ icon** to the right of the Custom View dropdown list
3. Enter a name for the view
4. Select the items to display
5. You may set this view as the default view for people in your department by checking the box
6. Click **Save**

Edit a custom view by clicking the pencil/paper icon. Delete a custom view by clicking the red X icon.

FAQ: Why can't I get a report of my Faculty showing Attendance Requirements?

There are two possibilities as to why you can't generate this report. Check both situations to configure your Conferences module correctly.

A. Faculty were not added to the roster, so therefore, no attendance was taken on them. Use these steps to add Faculty to your roster:

1. Go to *Conferences > Manage Conferences*
2. Select the first conference in a series
3. Click **Attendance**
4. Click **Edit Roster Configuration**
5. In the last picker box, hold down the Control key and select your Faculty and Program Director status types. Be sure that your residents/fellow status types are still selected
6. Check the box for **Save the Roster Configuration and Rebuild the Rosters for All Conferences in this Recurring Series**

7. Click **OK**
8. Click **Save Configuration and Rebuild Roster**
9. This process may take a while as all of the rosters in that series are created.
10. Click **OK**

Once attendance is taken on the faculty members for each conference, they will appear on your reports.

B. No Attendance Requirements were established for faculty members. Follow these steps to set Attendance Requirements for faculty members:

1. Go to *Conferences > Setup > Requirements*
2. Under Option 2, click **Add New Requirement**
3. Enter a Percentage Requirement
4. Check the appropriate boxes. For example, Faculty and Program Director
5. Click **Set Requirement**

FAQ: Can I put the conference calendar on my home page?

No, at this time the conference calendar cannot be displayed on the Home Page. You can still use the My Favorites links to take you to your calendars.

FAQ: What data is included in the Survey Compliance Report?

The compliance report shows:

- People who have been assigned a survey grouped by status
- The number of surveys available
- The number delinquent
- The completion compliance percentage

This report only shows surveys that are currently available to be completed. If a survey is no longer available (according to Survey Settings), then it will not be included. To display more information, adjust the available date for the surveys you want to be included in the report.

FAQ: How do I set up a conference so it populates my residents' Work Hour logs?

Note about using this feature: If your residents are supposed to enter only one log for the entire day, such as *'shift - 8 hours'* or *'work hours - 9 hours'*, **don't use the option to populate Work Hours**. Doing so will create duplicate logs for the conference time period. **A single log is used when the residents don't have to log conferences.**

In this example, the resident does not have to specify time in clinic, conferences or other work duties. It is just one continuous log for the day. Pre-populating the **work** hour log would not be appropriate because it would add a duplicate record:

<input type="checkbox"/>	Tu	10/20/2015 5:00 AM	10/20/2015 4:00 PM	11	Shift
<input type="checkbox"/>	W	10/21/2015 6:00 AM	10/21/2015 6:00 PM	12	Shift
<input type="checkbox"/>	Th	10/22/2015 6:00 AM	10/22/2015 6:00 PM	12	Shift

However, if your residents log each hour separately, such as *'AM clinic - 2 hours'*, *'Rounds - 1 hour'*, etc., **it is appropriate to have the conference populate the work hour log**. Just remind the residents **NOT** to enter a log for conferences. The system will do that for them when they are marked present at the conference.

In this example, the resident is required to log each **work** separately. Conferences are logged by the resident, so the option to pre-populate the **work** hours log using the conference module is appropriate:

<input type="checkbox"/>	Tu	3/8/2016 7:00 AM	3/8/2016 10:00 AM	3	Clir
<input type="checkbox"/>	Tu	3/8/2016 10:00 AM	3/8/2016 12:00 PM	2	Shi
<input type="checkbox"/>	Tu	3/8/2016 12:00 PM	3/8/2016 1:00 PM	1	Cor
<input type="checkbox"/>	Tu	3/8/2016 1:00 PM	3/8/2016 6:00 PM	5	Shi
<input type="checkbox"/>	Tu	3/8/2016 6:00 PM	3/8/2016 9:00 PM	3	Nig
				14	

First create a 'Conference' Assignment Definition to be used for the Work Hour logs. You'll use that Assignment Definition when you set up the conference. When a resident is marked 'Present' for a conference, an entry will be inserted in the Work Hour logs for the time and duration of the conference.

Create the Assignment Definition

1. Go to *Schedules > Assignment Definitions*
2. Click the **New** link located in the corner of the table header
3. Enter the Assignment Definition Details:
 - a. Name of the assignment - Conference
 - b. Short name used on calendars and custom views
 - c. Work type the definition is linked to for Work Hour rule checking - Conference
 - d. Location where the assignment takes place - N/A
 - e. Time the assignment begins - Choose any time. The conference module will insert the actual time of the conference
 - f. How long the assignment lasts - Choose any duration. The conference module will insert the actual duration of the conference
 - g. You don't need to add anything else to this assignment definition.
 - h. **Save.**

Configure the Conference to Add a Work Hour Log

This option only works for conferences in the future. It will not add logs for conferences in the past.

When you create a conference, go to the Additional Options section and check the box to "Add this time to the Work Hour logs of attendees marked Present using this assignment definition." Select the Conference definition you just created. **Save.**

Add this conference to the Duty Hour logs of attendees marked Present using this assignment definition:

Conference ▼

FAQ: I have more than one speaker. How do I send a survey for each one?

At this time, you cannot separate surveys by speaker. We recommend creating multiple conference instances with one speaker per conference. Attach surveys to each one so you can get separate results.

If you add multiple speakers to one conference and attach a survey, each speaker sees the survey results.

FAQ: 'Survey Response' Conference Surveys doesn't show results for a speaker

It is likely that the speaker was added to the conference manually using the text box instead of selecting from the list of available people in your database. The 'Survey Responses' link only displays data for people with demographic records in your database.

To easily determine which version of the speaker is linked to the conference, edit the speaker for that conference. If the speaker name is grayed out in the drop down menu, then the name is from the personnel record. If the speaker name text box can be edited, then the speaker name was manually added. If you delete the manually added name from the conference and replace it with the personnel record, the report data will appear for that person...

FAQ - How do I cancel a previously scheduled conference?

If attendance has not been taken, you can use the Delete icon on the Manage Conference tool bar.

1. Go to *Conferences > Manage Conferences*
2. Select a conference. Adjust the date range, if necessary.
3. Click **Delete** on the task bar above the list
4. If it is a recurring conference, select either **delete only this conference** or **delete the entire recurring group/series**
5. Click **Delete** on the task bar above the list.

Conferences cannot be deleted if attendance has been taken. Clear the attendance roster and then delete the conference.

FAQ - How can I preview a conference survey form?

As an Administrator, you can preview a conference survey prior to distribution.

1. Go to *Conferences > Surveys > Survey Forms*
2. If the form was used previously, click **View**
3. If the form has not been used, click **Edit**

FAQ - What does the question mark next to a name on a conference roster mean?

The question mark means that attendance has not been recorded for that individual.

Sometimes you will see that only one person's name on an entire roster has a question mark. This could mean that their name was added to the roster for a conference where attendance was already taken. To resolve it, take attendance for that person and re-save the roster.