STEP 10. SET UP A REGISTRATION SYSTEM

Registration of participants is a key element of every training event, and a good registration system is well worth the effort required to set it up and maintain it. Such a system enables you to easily and accurately keep track of your anticipated and actual attendees, communicate with them when needed, monitor their payment for the course, and award continuing education credits. Registration activities occur throughout the time span of the training program. As shown below, they can be divided into pre-course, day-of-event, and post-course tasks.

PRE-COURSE TASKS

ACTIVITY 10-A

Develop an application/registration form that provides the information you will need to communicate with applicants, screen their applications, and determine their expectations with regard to the training. This form is your primary source of information on the participants, so it should be designed with care. At a minimum, provide space for:

- Name
- Degree
- Organizational affiliation
- Position title
- Contact information (including postal address, email address, and telephone and fax numbers)
- Whether the applicant would like continuing education credits (CEs or CMEs)
- Medical license number (if requesting CEs or CMEs)

When planning a course with a defined target audience (e.g., nurses who spend more than 10 percent of their time working with TB patients), create an application form that asks participants about certain criteria related to the training which will determine if the applicant is qualified, such as:

- Job responsibilities related to TB
- Experience in working with TB patients
- Knowledge or skills the applicant hopes to gain from the course
- Percentage of time spent working with TB patients

Associated Tool #10 Course Brochure / Application

(Source: Francis J. Curry National TB Center, San Francisco)

You may also have prospective participants fill out a supplemental application which can provide further information regarding their suitability for the training.

Associated Tool #11 Supplemental Application

(Source: Francis J. Curry National TB Center, San Francisco)

ACTIVITY 10-B

Determine if applicants will be required to provide a refundable deposit or full or partial payment of fees in order to secure a space in the course and set up a system for processing these payments. Determine a deadline by which the check should be received. If your organization is set up to handle credit card payments, that is a convenient alternative that you may wish to offer to your applicants.

ACTIVITY 10-C

Set up a list or database for keeping track of all applicants. Include space to record the information in Activity 10-A, plus:

- The date the registration or application form was received

- Status (accepted, rejected, waiting list)
- Payment status (if applicable)
- Attendance at the training event (post-course)
- Continuing education credits earned (post-course)

ACTIVITY 10-D

Screen the registrations or applications. In many cases, all individuals who express interest are allowed to attend the training. However, if there are requirements that must be met or you receive more applications from participants than you can accommodate, you will need to determine which applicants qualify and which do not. Maintain a list of all applicants and their status for future reference.

ACTIVITY 10-E

If there are more qualified applicants than can be accommodated, compile a waiting list. The usual policy is that qualified applicants are accepted in the order that their applications are received, so that the waiting list includes the last applicants to apply. You may also wish to limit the number of participants from any one health department or region in an effort to more effectively distribute the information. If you wish to screen all applications before deciding who to enroll make the due date for them well before the event.

Associated Tool #30 Participant Waiting List Letter

(Source: Francis J. Curry National TB Center, San Francisco)

You might wish to ask for a refundable deposit whether or not a fee is charged for the course:

- No-fee course: The deposit is a good-faith indicator that the applicant plans to attend. Retain the checks in a secure place, and return them to the applicants on the first day of the training

- Fee course: You can ask for either partial or full payment to be made in advance. If you request only a partial payment, the balance should be due not later than the first day of the training

ACTIVITY 10-F

Assemble a confirmation packet and send it to accepted applicants. The packet should include:

- A confirmation letter that includes a reminder of the date, time, place and cost (if any) of the training, and specifies any deposit or payment requirements. This letter should also contain a brief description of what participants can expect (will there be a clinic tour or some other activity which may require walking?) and a dress code for training (usually inviting participants to dress comfortably)
- A list of nearby overnight accommodations for participants who will be traveling a distance to attend (if applicable)
- Directions for how to get to the training site, parking information, and public transportation options
- The name of a contact person for further information

Associated Tool #28 First Participant Confirmation Letter
(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #31 Hotel List, San Francisco, California
(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #32 Directions to Training Site (CNTC)
(Source: Francis J. Curry National TB Center, San Francisco)

ACTIVITY 10-G

Write rejection and waiting list letters and send them to the applicants who are in these categories.

Associated Tool #29 Participant Rejection Letter

(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #30 Participant Waiting List Letter

(Source: Francis J. Curry National TB Center, San Francisco)

ACTIVITY 10-H

Process deposits and payments as they are received. If an expected deposit or payment check is not received by the deadline, follow-up with the applicant to confirm his or her intention to participate. Decide internally how to proceed if check is not received by a given date.

ACTIVITY 10-I

If an accepted participant cancels, notify the person at the top of the waiting list that there is a space available. If that person accepts the space, send them a confirmation packet.

ACTIVITY 10-J

One week prior to the first day of training, e-mail, fax, or mail a reminder to all accepted participants. This notification recaps the information in the confirmation packet, including directions to the site, parking information and public transportation options.

Associated Tool #32 Directions to Training Site (Curry Center, SF)

(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #33 Final Participant Confirmation Letter/Fax

(Source: Francis J. Curry National TB Center, San Francisco)

ACTIVITY 10-K

Create sign-in sheets to use for registering attendees as they arrive. The sign-in sheet should include the participant's name, degree, and license number, and be arranged alphabetically by last name.

Associated Tool #46 Sign-in Sheet

(Source: Francis J. Curry National TB Center, San Francisco)

ACTIVITY 10-L

Create nametags for participants. Preprinted nametags showing the participant's name and affiliation are easier to read and look more professional than handwritten ones and they can be easily prepared using a word processing program. You can obtain nametag blanks and plastic holders from an office supply store. Keep some blanks on hand for walk-ins or in case there are changes.

Associated Tool #47 Participant Name Tags

(Source: Francis J. Curry National TB Center, San Francisco)

ACTIVITY 10-M

For courses that are held in a U-shaped classroom style (fewer than 30 participants, see Step 11: Arrange for the Configuration and Set-up of the Meeting Space), create name signs (table tents) for participants. Like nametags, these can easily be prepared using a word processing program. The names are printed lengthwise on 8.5" x 11" cardstock, which is folded so that participants can place them on the table in front of them when they find a seat in the training room. Proofread them carefully to be sure the names are spelled correctly.

Associated Tool #48 Participant Name Sign

(Source: Francis J. Curry National TB Center, San Francisco)

DAY-OF-EVENT TASKS

ACTIVITY 10-N

Set up the registration area. For a small, on-site course, your reception area might serve this purpose. For a large, off-site training program, the registration area ideally should be located in a lobby or foyer just outside the training room.

For the large courses, you will need a table with room for registration staff (usually 2-3 people) to sit and work comfortably. If you expect a high number of participants, you may want two or more tables. Put the materials to be distributed within easy reach. Nametags and name signs can be arranged alphabetically on a nearby table for participants to pick up themselves if that is more convenient.

For large courses, assign each registration staff person to be responsible for a particular segment of the alphabet (A-D, E-J, etc). Place signs to direct arriving participants to the correct alphabetical station.

Associated Tool #49 Directional Sign

(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #50 Directional Sign: Registration Table

(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #51 Directional Sign: Registration Instructions

(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #52 Directional Sign: Help Table

(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #53 Directional Sign: Pre-/Post-Test Instructions

(Source: Francis J. Curry National TB Center, San Francisco)

ACTIVITY 10-O

As participants arrive, have the registration staff:

- Greet and welcome them

- Instruct them to sign the sign-in sheet and verify that their name is spelled correctly and their medical license number and degree(s) are accurate
- Give them their course materials, nametags, and name cards, or direct them to the place where these items can be picked up
- Let them know where the pre-test (if applicable) is (portfolio) and advise them that it will be picked-up prior to start of the training
- Answer questions or, if appropriate, direct the questioner to another staff member for assistance

ACTIVITY 10-P

Have participants sign in at the start of each day of a multiple-day course. If necessary for purposes of awarding credit, have them sign in a second time later in the day (when returning from lunch or at the end of the day).

Associated Tool #46 Sign-in Sheet

(Source: Francis J. Curry National TB Center, San Francisco)

POST-COURSE TASKS

ACTIVITY 10-Q

Ensure that the post-course tasks regarding the awarding and documenting of continuing education credits are carried out. (See Step 8: Continuing Education, Activities 8-G through 8-J.)