**POST-TRAINING**

**HOW TO PROCESS TRAINING PAPERWORK**

**Survey Monkey:**

1. Print individual registrations off of survey monkey. These are each 2 pages long.
2. Staple 2 pages together.
3. Save individual registrations into correct training folder by date and location.

Dropbox\PBO work folder\19-20 SOS Grant Competitive Cycle\19-20 Registration and Post tests\9.16.19 Youngstown

**Training paperwork:**

1. Separate proficiency checklist from each testing packet. Ensure participant’s name is on the following sheet so that it can be matched up with Survey Monkey Registration. If name is not on Module 1 test, write it on the Module 1 test.
2. Cut corner of each proficiency checklist to ensure ease of scanning. Place checklists into a separate pile.
3. Separate Satisfaction Survey/Evaluation from each testing packet. Cut corner of evaluation to ensure ease of scanning. Place evaluation into a separate pile.
4. Match tests to Survey Monkey registration and staple with Survey Monkey on top.

**Grading:**

1. Each test should be graded, and an average for all 5 tests written on the first page of the Survey Monkey.
2. If average score is less than 80%, flag in and let David review.

**CIVIC Data Entry:**

1. Enter each individual into CIVIC volunteer.
2. Enter a program report for each training in CIVIC.
3. Accuracy is important!

**Evaluation data entry:**

1. The scores from each individual evaluation need to be entered into the spreadsheet. Dropbox/19-20 Competitive Cycle/19-20 registration and post tests/Satisfaction survey responses

**Scanning:**

1. Scan satisfaction surveys into correct training folder by date and location.
2. Scan proficiency checklists into correct training folder by date and location.
3. Scan and save sign in sheet (we will need this for OCCRRA).

Dropbox\PBO work folder\19-20 SOS Grant Competitive Cycle\19-20 Registration and Post tests

**OCCRRA Credit processing:**

1. Easiest to refer to the OCCRRA instructions that have been printed out in the file folder. David has this.

**Equipment ordering:**

1. Pull volunteer report from CIVIC
	1. Choose “Reports” from menu on left side of the screen.
	2. Scroll down and select “Volunteer Activity Related Reports and Extractions”
	3. Enter the date of the training. There is a beginning date and end date. If the training you are pulling happened on 10/21/19, I generally enter 10/21/19 as the start date and 10/22/19 as the end date. Select “Volunteer Activity within Date Range Data Extraction to Excel”.
	4. A separate white page will pop up. Enlarge the window. In the bottom left corner of the white window, you will see an excel spreadsheet downloading. Once it downloads, open the spreadsheet and begin to manipulate the data.
	5. Keep first name, last name, both primary and secondary addresses, and # kits ordered. Delete all other columns. Also, delete the record of anyone who did not want equipment.
	6. Cross check the spreadsheet with the individual sets of paperwork to make sure that equipment is being sent to the appropriate address. If the trainee wants equipment shipped to his or her home address, you can copy and paste the secondary address into the columns populated with the work, or primary, address.
	7. If the trainee does not want equipment, delete their name from this spreadsheet.
	8. Once all paperwork has been cross checked with the spreadsheet, delete all columns except what is below.
2. Send this spreadsheet to Genevieve at School Health. ghendle@schoolhealth.com 866.323.5465

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| First Name | Last Name | Address1 | Address2 | City | State | Zip | # Kits Ordered |

Save spreadsheet here: Mdrive/SOS Coordinator/orders to school health/SFY 2019-20

**Checking invoices against orders:**

1. Invoices will be mailed to pbo and put in your box
2. Check each invoice against the hard copy of the excel spreadsheet
3. Check mark on the excel spreadsheet next to name that matches the invoice. Check mark on the invoice.
4. Give all invoices to Tari once all are checked

**Send certification information to PBA each month:**

1. Send both ADVT, SOST, SOST recert and SOST-recert 5 and 10OL records to PBA. These get sent to Tasha Swain (she has remarried and her last name has now changed, but her email address is: tswain@preventblindness.org.
2. It is best to wait until all the data entry has been completed for the month. This is usually complete by the 15th of every month.
3. You will need to pull two separate reports from civic: the Volunteer Activity Related Report and the New Volunteers by contact date. You have to pull both in case someone was trained in a previous month (i.e. trained in August, their data wasn’t entered until the month you are completing the report for).
	1. Choose ‘reports’ from the menu on left side of screen
	2. Enter beginning and ending data. i.e. 9.1.2019 and 9.30.2019
	3. Choose ‘volunteer activity within date range data extraction to excel’ for both reports
	4. A separate white page will pop up. At the bottom left of the page is an excel spreadsheet that will download. Then open that spreadsheet and begin to manipulate data.
	5. Sort by: event code and last name
	6. Delete all but these codes: ADVT, ADVT RECRT, SOST, SOST-RECERT, SOST-recert5OL and SOST-recert10OL
	7. Also delete all columns to the right of event code (i.e. trainer name, training city, …….). You will be deleting about 27 columns.
	8. You will make a separate sheet for all the codes that you have that month. So one spreadsheet could have multiple sheets.
	9. Copy and paste the heading row from the main worksheet onto each sheet that you will need
	10. Cut and paste each code onto their own sheet. i.e. everyone who is an ADVT is on one sheet, same with SOST, SOST recert, etc.
	11. If you have any SOST-recert10OL, you need to create a separate spreadsheet for these folks. Their certification is only valid until June 30, 2020 (as opposed to the standard 3 year certification for everyone else).
	12. Save your spreadsheet on the M drive/SOScoord/Certification records to PBA/2019/**month of report**, i.e. 9.19
	13. Email report to Tasha. PBA produces the certification cards and emails them to everyone.
	14. If you are not sure what the spreadsheets should look like, you can look at old ones on the M drive.

**Amazon Gift cards for individuals that have recertified online:** Each month, once all civic entry has been completed, PBO sends (via email) a $10 Amazon gift card to everyone who has completed their online recertification.

1. Run a volunteer activity related report civic report for the month
2. Sort by CODE
3. A gift card is purchased for anyone who has a code of:

 SOST-recert5OL or SOST-recert10OL

1. Get the visa card from David
2. Do a purchase order
3. Go to the Amazon website and log into our account using: username: wendyk@pbohio.org and password: Merlin2020
4. Purchase $10 gift cards that you email to individuals. Copy/paste email addresses from the civic report.
5. The gift card is from Prevent Blindness Ohio Affiliate
6. Message: Please enjoy this Amazon gift card as a thank you from Prevent Blindness Ohio affiliate for completing your online children’s vision screener recertification test.
7. File a copy of the excel spreadsheet here: dropbox: 19-20 SOS grant/Amazon gift cards
8. Print a copy of the order and attach to the PO. Give to David to sign.