



# REGISTRY ONLINE REGISTRATION TOOLKIT

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## WELCOME TRAINING SPONSOR ORGANIZATIONS!

Online registration is a feature available to Registry approved Training Sponsor Organizations (TSO). If you are not already a Registry approved TSO, you can become one for a nominal annual fee and by electronically signing an agreement form outlining ethical obligations and professional responsibilities. For more information about becoming a Registry approved Training Sponsor Organization check out [this information](#).

If you have already gone through the TSO approval process, you are posed to explore if online registration is a good fit for your organization. Some features of online registration include:

- *Registration Administration*
- *Online Payment Collection*
- *Event Management*
- *Attendance Tracking*
- *Communication with Registrants*

TSO's already using online registration in the Registry system find it has streamlined their registration and event entry process as well as minimized 'double work' in using two databases for the same purpose. Check out the rest of this toolkit to see if online registration is for you, what the process is for *turning on* online registration, and all of the handy Registry guides created to support your learning.

# GETTING READY FOR ONLINE REGISTRATION

Before your online registration journey can begin, there are a couple things to consider.

1. Determine who within your organization will be the **Registry liason** for online registration set up and technical assistance.

Although Registry staff can support multiple people within your organization, it is best if there is one person designated as the main contact. This individual must have administrative access to the organization's Program Profile and have the ability to consult on fiscal matters related to the collection of online registration fees.

2. Consider convening a small workgroup within the organization to think through **business rules and internal procedures** as it relates to online registration.

Setting up online registration is not something that can be done in a matter of minutes rather it takes time, planning, and patience. Transitioning from current practices to using online registration will take thought and preparation. Check out the linked guides included in this toolkit to begin thinking about this transition process.

## ONLINE REGISTRATION ANNUAL FEE

Like most online registration platforms, there is a cost to using the Registry system's online registration system. The yearly cost to TSOs for using online registration covers the cost of:

- Administering the online registration system
- Registry staff onboarding and support
- Enhancements to quality of life improvements based on user feedback
- System enhancements for increased online registration functionality

The annual fee for online registration is determined by the role of the TSO. If the TSO provides direct care, the annual fee is \$125, averaging a little over \$10 per month. If the TSO does not provide direct care, the annual fee is \$250, averaging a little over \$20 per month. The annual fee must be paid in full at the time of online registration activation. Payment can be made by check, money order, or credit card.

## ACTIVATING ONLINE REGISTRATION

Complete the [Online Registration Request Form](#) to begin the process of activating online registration. Submit the complete form with payment to The Registry for processing. Online registration requests are processed within 2-4 weeks.

Registry staff will contact the Registry liason designated as the main contact on the Online Registration Request Form to schedule online registration onboarding. Onboarding involves Registry staff meeting in person with the TSO to support the set up of online registration. Plan for a three-hour timeframe to complete the onboarding experience. The TSO's Registry liason and any staff that will be working directly with online registration should participate in onboarding.

# ONLINE REGISTRATION SET-UP

During the onboarding experience, Registry staff walk the TSO through setting-up online registration and share helpful resources and support guides.

## STEP #1: PROGRAM PROFILE SETTINGS

Setting up online registration starts with updating the organization's Program Profile settings. This will include:

- Activating online registration
- Setting up a Stripe account
- Agreeing to the Terms & Conditions of online registration
- Determining if the organization will accept alternative payments
- Setting up program defaults, aka business rules, for online registration

Review the support guides [Online Registration Part 1: Program Profile Settings](#) and [Tips & Tricks Online Registration Program Profile Settings](#) to prepare for this first step.

## STEP #2: EVENT SETTINGS

With the Program Profile settings in place, the next step in setting up online registration is taking a deeper look at event settings. If you are familiar with Registry PDASystem event entry, the support guide [Online Registration Part 2: Event Settings](#) will walk you through the steps specific to online registration. Review [Tips & Tricks Online Registration Event Settings](#) to learning more about the additional information collected during event creation including:

- Attendee information collected
- Registration fees
- Additional item options
- Event communications

## STEP #3: MANAGING ONLINE REGISTRATION

Once an event is scheduled using online registration, it's time to think about managing registration. This can include:

- Payments
- Group registration
- Attendance changes
- Editing events

Check out [Online Registration Part 3: Managing Payments](#), [Online Registration Part 4: Attendee Changes](#), and [Online Registration Attendee Registration Guide](#) for more details.

## STEP #4: ATTENDANCE

One of the perks of online registration is the ease of attendance verification. The event roster is created as attendees register online for the event making attendance verification a breeze using the Registry app. Refer to the [Training Attendance Verification](#) support guide to learn more about the process.

## MOST COMMON QUESTIONS

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**Q:** *I am an individual trainer. Can I use online registration?*

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**A:** You are welcome to create a Program Profile and request to be a Training Sponsor Organization. As a Registry approved TSO, you can choose to active online registration. A TSO that does not provide direct care is charged the annual fee of \$250, averaging a little over \$20 per month, to use online registration. Here is a guide on [Creating a Program Profile](#).

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**Q:** *Do attendees have to be Registry members?*

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**A:** Attendees must have a Registry account but do not need a Registry membership. Creating a Registry account is free. Here is a guide to share with participants [Creating a Registry Account](#). Please note that the WI Registry system requires a unique email to create an account. To complete the registration process, individuals will need to log in to their email account.

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**Q:** *Are there accounting reports for online registration?*

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**A:** No. The TSO is responsible for their own accounting and financial record keeping.

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**Q:** *Can I use online registration if the event is free?*

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**A:** Yes! When scheduling an event, you can choose the option to make the event free in event settings.

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## WHAT HAPPENS NEXT?

Now that you have online registration set up, go ahead and schedule your training events. Throughout the year, be sure to:

- Check in with The Registry with any questions, comments, or concerns
- Update business rules and internal procedures as needed
- Keep clear, concise financial records for accounting purposes
- Plan in your budget for renewing online registration next year
- Plan ahead for your training scheduling needs when online registration renewal approaches to avoid delays in scheduling and registration
- Stay connected for Registry updates related to online registration