**AE Portal Tricks & Tips**

- Designate **one person** to do <u>ALL</u> data entry for your entity in order to keep your data consistent.

- Notify INCCRRA **<u>immediately</u>** if/when the main contact or data entry contact changes.

- When accessing the AE portal, use the latest version of **<u>Google Chrome</u>** or **<u>FireFox</u>** and **<u>disable your pop-up blocker</u>**.

- Before you create your training event, you will need to create your Training Course.

- A Training Course can be broken down into multiple Gateways Content area, and CDA Content Areas. Each Content Area must be at least **<u>1 hour</u>** in order to be counted. The total of these hours should equal the number of contact hours of actual content delivery reported. Be intentional when selecting the content areas that best fit the training.

- Review current Training Courses and Training Events before creating new ones. **<u>Avoid creating duplicates</u>**. Enter information **<u>carefully and diligently</u>**.

- Use the "Status" option when adjusting training, trainer, and course status. Training course and trainer status options include 'Active, Inactive or Pending.' Training Event status options include 'Available', 'Closed', 'Cancelled', 'Completed', and 'Pending'.

- A **<u>workshop</u>** training is a training that takes place in one day.

- A **<u>series</u>** is a training with multiple sessions over multiple days. For a participant to receive full credit, they must attend ALL the sessions of the series. We understand that things come up but, as a rule, participants should only be receiving credit if they attend all sessions of a series.

- When entering a Training Event, please be sure to select the appropriate start date and end date. The end date should be the last day of the Training Event. Participants will not receive credit until the rosters have been reconciled. Two things must happen for participants to receive credit; the Training Event end date has occurred, and the rosters have been reconciled.

- If you want your Training Event to show up on the Statewide Online Training Calendar, you must mark yes under *Post to Calendar*. If you do not want the training to display on the calendar, you will mark no.

- The Training Event ID will generate once you have saved the Training Event for the first time and will need to be placed on the Certification of Completion. The Training Event ID will start with AE followed by number; for example, AE-327192197.

- It is important that you collect participants Registry Member IDs at the beginning or end of the training. You will need this information to reconcile your Training Event and provide Registry credit to your participants. A good idea is to suggest members make note of their ID numbers for future trainings, so they always have it.

- It is best practice to **reconcile your training within 10 days after completion**.

- When adding your rosters, double check that the name and contact information match the information you have for that participant. This will ensure you are providing Registry credit to the correct participant.

- If a participant cancels or is a no show, be sure to adjust their status accordingly on the roster.

- Once a training has taken place and the roster has been reconciled, you will need to change the status of the Training Event to "Completed."

- If a non-Registry member attends your event, they will not have a Gateways Registry Membership and cannot be entered on the roster.

- Self-Paced training rosters are completed differently than rosters for Workshop Trainings and Series Trainings. You will need to change the "Registration Status" field to 'Complete' for each participant **individually** and enter a **"Completed Date"**. The Completed Date will vary from person to person. Participants will not receive credit until these two items have been completed.

- The training will show on participant's Professional Development Record (PDR) within 24 hours of reconciliation.

## Additional Resources

**Authorized Entity Portal Training**

Log in to the i-learning website using your Gateways Registry username and password. The enrollment key is **dataentry**. Please enter the enrollment key exactly as it is written. It is case sensitive.
https://courses.inccrra.org/course/search.php?search=Authorized+Entity

**Guide to Using the Gateways Registry Authorized Entity Portal available at**

https://inccrra.zendesk.com/hc/en-us/articles/205024789-Guide-to-Using-the-Gateways-Registry-Authorized-Entity-Portal

**Contact the Registry Help Desk for technical assistance in using the AE Portal**

- Phone: (866) 697-8278 (option 2)
- Email: registryhelp@ilgateways.com
- Help Center: https://inccrra.zendesk.com/hc/en-us

Contact your AE Contact Stacy Snow at ssnow@inccrra.org regarding any questions about being an Authorized Entity or the AE Portal.