

VSHRM RSVP Chair *(This is a two-year term)*

Job Description

RSVP responsibilities include pulling information from the website for members/guests who RSVP for monthly meetings. Updates website with meeting attendance; runs reports from website; responds to meeting inquiries. Work closely with treasurer to monitor payments for monthly meetings. Attend monthly membership and board of directors meetings.

RSVP Process

1. Member/Guest RSVP's via chapter's website
 - a. Members must log in to receive the member discount for meeting fee.
 - b. Deadline to register is 5:00 p.m. on Thursday before meeting. The site is programmed to add \$5 late fee to all who register late.
2. For each RSVP an email notification is sent to Treasurer and RSVP Chair
 - a. Notification gives member information and payment information
3. Payment options are listed on the RSVP form
 - a. Notification email sent to Treasurer and RSVP Chair when a payment is made via Pay Pal or credit card
 - b. The system automatically sends a confirmation email to the registrant
 - c. FAST PAY option available during September for members only. Member receives a discount by paying for all 10 meetings (seminar included) up front in September. No refunds received if member is unable to attend a meeting; member may send a guest in their place for the meeting they are unable to attend, not a future meeting.
 - d. Refunds are not granted for members who prepay for a meeting when registering and then are unable to attend the meeting. A replacement may attend in place of the member for that meeting only.
 - e. Registered members planning to pay at the door who are unable to attend the meeting will be invoiced to cover the cost of the meeting
4. RSVP Chair monitors registrations and maintains communication with Program Chair regarding guest list to ensure appropriate count is provided to venue in a timely manner. Deadline for most venues is Friday before meeting.
5. RSVP Chair runs attendance report from website using CSV Export and creates Excel spreadsheet for check in table.

Step-by-Step Instructions for RSVP Chair:

Prior to Meeting:

Log in to Joomla VSHRM site – www.vshrm.org/administrator/

Choose “DT Register” from the “Components” menu bar

Select “Records”

The screenshot displays the Joomla VSHRM administrator interface for the 'Registration Records Manager'. The top navigation bar includes 'System', 'Users', 'Menus', 'Content', 'Components', 'Extensions', 'Help', 'Community Builder', 'Paid Subscriptions', and 'GroupJive'. The main toolbar contains buttons for 'Group Registration', 'Individual Registration', 'Edit', 'Delete', 'Re-send Thanks Email', 'Attended', and 'Control Panel'. The 'Registration Records Manager' section features a 'Select Event' dropdown menu, a 'Show Failed Attempts' dropdown, and a 'Select Status' dropdown. Below these are instructions for using the filters and adding records. The main table lists registration records with the following columns: #, Registrant's Name, Email, Event, Amount, Register Date, Confirmation Number, Discount Code, Payment Type, PAID, Attended, Members, Amount Due, and Status. The table contains 10 rows of data, including registrants like Roger Walster, Yvette Mooren, Elizabeth Peters, Britney Maurer, Jillan Westall, Ann Schmidt, Kathleen Davenport, Deborah Bishop, Kara Schymanski, and Ben Spreeman.

#	Registrant's Name	Email	Event	Amount	Register Date	Confirmation Number	Discount Code	Payment Type	PAID	Attended	Members	Amount Due	Status
1	Roger Walster	Roger@strategicsservicegroup.org	Meeting (06-09-2015)	35.00	05-12-2015	DT-1240		Pay at the Door	<input type="checkbox"/>	<input type="checkbox"/>		35.00	Pending
2	Yvette Mooren Senato	yvmo@mkllumstaffing.com	Meeting (06-09-2015)	30.00	04-19-2015	DT-1239		Pay at the Door	<input type="checkbox"/>	<input type="checkbox"/>		30.00	Pending
3	Elizabeth Peters	lpeters@masudlaboraw.com	Meeting (06-09-2015)	22.00	04-19-2015	DT-1238		Pay at the Door	<input type="checkbox"/>	<input type="checkbox"/>		22.00	Pending
4	Britney Maurer	brmaurer@mobilemedical.org	Meeting (06-09-2015)	22.00	04-19-2015	DT-1237		PayPal	<input checked="" type="checkbox"/>	<input type="checkbox"/>		0.00	Active
5	Jillan Westall	jwestall@mobilemedical.org	Meeting (06-09-2015)	52.00	04-19-2015	DT-1236		PayPal	<input checked="" type="checkbox"/>	<input type="checkbox"/>		0.00	Active
6	Ann Schmidt	ann.schmidt@midmichigan.org	Meeting (06-09-2015)	22.00	04-16-2015	DT-1235		PayPal	<input checked="" type="checkbox"/>	<input type="checkbox"/>		0.00	Active
7	Kathleen Davenport	kdaavenport@healthdelivery.org	Meeting (06-09-2015)	22.00	04-16-2015	DT-1234		PayPal	<input checked="" type="checkbox"/>	<input type="checkbox"/>		0.00	Active
8	Deborah Bishop	dbishop@msu.edu	Meeting (06-09-2015)	22.00	04-15-2015	DT-1233		Pay at the Door	<input type="checkbox"/>	<input type="checkbox"/>		22.00	Pending
9	Kara Schymanski	kara.schymanski@midmichigan.org	Meeting (06-09-2015)	30.00	04-14-2015	DT-1232		Pay at the Door	<input type="checkbox"/>	<input type="checkbox"/>		30.00	Pending
10	Ben Spreeman	benjamin.spreeman@odaccon.com	Meeting (06-09-2015)	30.00	04-14-2015	DT-1231		PayPal	<input checked="" type="checkbox"/>	<input type="checkbox"/>		0.00	Active

From the “Select Event” drop down menu, choose the appropriate meeting date

Manually add registration record for all board members and Fast Pay members by clicking on the green “Individual Registration” button.

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www.vshrm.org/administrator/index.php

System - Users - Menus - Content - Components - Extensions - Help - Control Panel

Save Close Control Panel

Categories: Event: June Meeting (06-09-2015 11:30)

Configuration: UserID: Select User

CSV Export: Discount Code: []

Fields: Status: Select Status

Discount Codes: PAID: No Yes

Email Registrants: Amount Paid: []

Events: Payment Method: Select payment method

Locations: First Name: []

Pay Options: Last Name: []

Permissions: Organization: []

Records: Email: []

Reminders: Phone: []

Community Builder: How Many Guests: 0

• Credits

• User Management

• Tab Management

• Field Management

• List Management

• Plugin Management

• Tools

• Configuration

Paid Subscriptions: Notes: []

• Payments Center

• Settings

• Gateways

• Plans

• Subscriptions

• Baskets

• Payments

• Notifications

• Currencies

• Statistics

• Merchandise

Send Email:

The following fields should pre-populate after selecting the member's name:

- Select User (this is the member's name)
- Status (this is the membership status)
- Paid (yes/no)
- Amount Paid
- Select Payment Method (PayFast, Pay at the Door, PayPal, Mail in Payment)
- First Name
- Last Name
- Organization
- Email
- Phone (format must be numbers only – no hyphens or spaces)
- How many guests
- Notes
- Send Email (if box is checked the member will receive an email)

Creating Attendance Report

Select "CSV Export" from the left menu bar

Select the appropriate meeting date to run the report and click on the green "Next" button at top

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System - Users - Menus - Content - Components - Extensions - Help - Community Builder - Paid Subscriptions - GroupLive - Control Panel

Next Control Panel

Categories: Here you can export your registration records data. First, please select the event(s) that you want to export data from. Click the CHECK ALL box to select all events. After selecting events, click the NEXT button in the top right corner of the screen.

Configuration: Check All

CSV Export: October Meeting (10-23-2013 07:30 am - 09:15 am)

Fields: December Meeting (12-10-2013 11:30 am - 01:15 pm)

Discount Codes: February Meeting (02-11-2014 11:30 am - 01:15 pm)

Email Registrants: April Meeting (04-08-2014 11:30 am - 01:15 pm)

Events: June Meeting (06-10-2014 11:30 am - 01:15 pm)

Locations: Fast Pass (2014-2015): (09-09-2014 11:15 am - 01:15 pm)

Pay Options: November Meeting (11-11-2014 11:30 am - 01:15 pm)

Permissions: January Meeting (01-13-2015 11:30 am - 01:15 pm)

Records: March Meeting (03-10-2015 11:30 am - 01:15 pm)

Reminders: May Seminar (05-12-2015 11:00 am - 03:30 pm)

Community Builder: November Meeting (11-12-2013 11:30 am - 01:15 pm)

• Credits

• User Management

• Tab Management

• Field Management

• List Management

• Plugin Management

• Tools

• Configuration

Paid Subscriptions: January Meeting (01-14-2014 11:30 am - 01:15 pm)

• Payments Center

• Settings

• Gateways

• Plans

• Subscriptions

• Baskets

• Payments

• Notifications

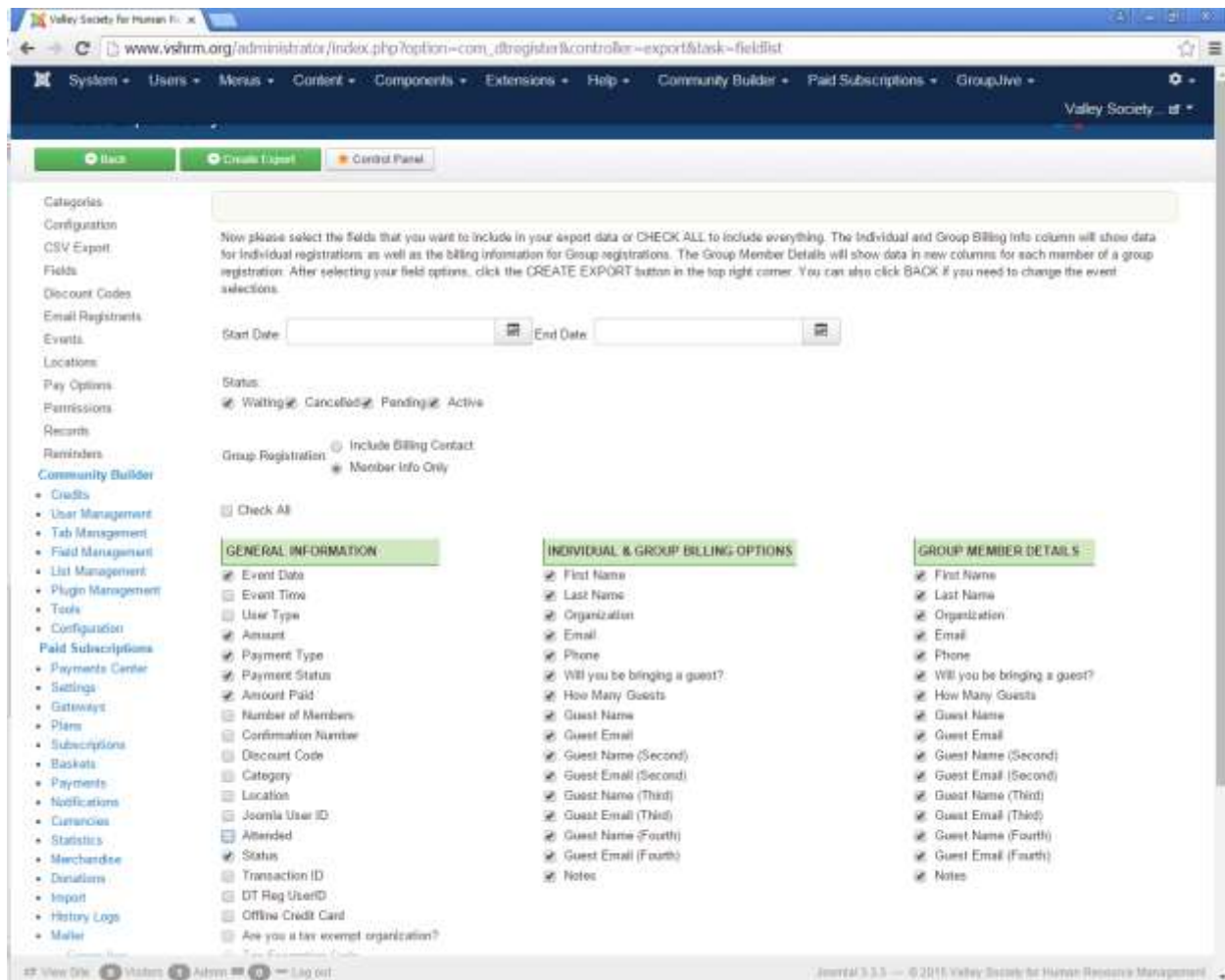
• Currencies

• Statistics

• Merchandise

Select the Start and End Date for the time frame you wish to run the report for.

Check the boxes next to the information you wish to display on the report, as identified below:



Click on the green “Create Export” button at the top to run the Excel report.

Once the Excel report is created manipulate the data to the format you wish to have the report printed for check in purposes at the registration table. (See separate report)

Create receipts in Word using a merge template from the registration report. Manipulate data accordingly. Print copies for registrants.

During Meeting

RSVP Chair and Treasurer check manage the check in table, accurately recording attendance to include walk-ins and no-shows.

After Meeting

Update attendance report in Excel with data from the meeting. Also update the website with attendance information for the meeting. This is a manual task for each registrant. There is an option to mark “Paid” for each individual as well.