

IITAP Webinar Instruction Manual

Instructions on how to proceed with IITAP webinar once the faculty has been chosen, contract has been signed and learning objectives, descriptions and APA information has been received.

First Steps:

- Post webinar to the events page on the website
- Make a survey for the webinar. You will need the learning objectives to do so.
 - Copy survey from **Webinar 21 | Twisting of the Sacred** - by going to Features, under Surveys and Quizzes, click Surveys. Then: click the three lines next to the pencil to copy the survey



- The first 4 questions will be on educational goals (Ed_Goals_I_Can_Do_Goal_) and you will have to design those from the learning objectives found on the event page of the website.
 - For example: the objective is “Describe two categories of clergy sexual misconduct and the associated risk factors and warning signs”
 - Your question should be: “Upon completion of this webinar, clinicians are able to describe two categories of clergy sexual misconduct and the associated risk factors and warning signs.”
- If you are unfamiliar w/ zoom please connect w/ Marina or Amanda for a tutorial or to schedule a time to observe a future webinar. This link will help also:
<https://iitap.com/page/Tech>

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30 days before Webinar

- Connect with faculty and schedule a time to meet with them via zoom for about 30 minutes to go over questions, requirements, and to make sure they feel comfortable with zoom and the technology side of things.
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Example email:

Hi Barbara,

I hope that this email finds you well. We are very much looking forward to working with you on the webinar coming up in a couple of weeks. I am wondering if you have some time the week of the June 25th to meet via zoom for about 20-30 minutes to go over specifics of the zoom platform and to answer any questions that you have.

If possible, please have a powerpoint up in the background during this meeting so I can show you how to share your screen to the participants.

I am in the office and have a flexible schedule that entire week except for Monday. Is there a better time for you to meet?

Thank you!

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- Once a time is agreed on set up a meeting in zoom and send the faculty member the link as well the following link on instructions on how to download zoom :
<https://iitap.com/page/Tech>
- During meeting go through the following criteria
 - ***Make sure to make them a co-host so they are able to share screen and so forth.***
 - Show them how to share screen w/ powerpoint
 - Emphasize that there needs to be at least two 10 minute breaks within the 4 hours
 - Ask them if they would like to send their slides to the group prior to the webinar so they can print them off (we will make them into a PDF and copywrite it). If they would like to make sure that they send them to you 2 weeks ahead of time. It is ok if they do not want to and they should not be pressured into doing so as this is their intellectual property. Should they change their mind after the webinar we can send it to the group post webinar.
 - Go over how they would like to handle questions. Typically we mute everyone upon entry. If there are questions they are able to type them in the chat function or email them to the IITAP staff. Once it is an appropriate time for questions the facilitator will ask the IITAP staff and he/she will verbally speak them. Should there be more explanation with the question we will invite the person who asked to unmute and have a conversation
 - Let them know that you will be there and available during the ENTIRE webinar, even when they cannot see that the camera is on you or someone is there. *Should you have to use the facilities or step away for a minute please ask someone in the office to step in for you while away. Do not take any important phone calls during this time as well. Once the webinar is underway you can turn off your camera but make sure to turn it back on when speaking questions or addressing the class.*
 - Tell them that you will start off the webinar and go over some housekeeping notes (breaks, introductions, and so forth) and will give a very brief introduction to them. Once done you will turn it over to them.
 - Before ending phone call let them know that you will be sending the link for their zoom webinar soon. Let them know you will be on there a half hour ahead of time so that they can log on early and make sure things are working properly. Let them know everyone else will be in a virtual waiting room until you let them in.
 - Confirm the date is PST/PDT and that they know this (they signed a contract with this info.)
 - Tell the faculty that closer to the date of the webinar you will send them a list of who is participating along with where they are coming from (you will not be sending them email addresses or contact info).
 - Ask them how they would like to be addressed during the webinar
 - Ask for a good phone number to be able to reach them immediately after the webinar or even during should anything be urgent or technical difficulties.

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- After Faculty Phone call
 - Follow up via email recapping what was discussed (would be easier to copy/paste the bullet points above from “**During meeting go through the following criteria**”). If the slides will be shared with participants, provide the presenter with a submission deadline.

Sample email:

Hi Erica,

It was good chatting with you this morning! Below is a summary of our discussion and notes for your upcoming webinar. I'm available if you have any questions, so please don't hesitate to reach out!

Refresher Webinar 5: Yes, No, Some, or All: The Crossover of Sex Addiction, Paraphilias, and Offending Behavior

Date: Thursday, October 31, 2019

Time: 8:00 am – 12:00 pm PDT

- ***Breaks:*** *The event page for your webinar shows the following break times: 9:30 am - 9:45 am and 10:45 am - 11:00 am. I like your idea of announcing 10 minute breaks, but allowing for 15!*
- ***Sharing your slides:*** *If you would like to share your slides with the participants prior to the webinar, please send those to me by **Tuesday, October 15th** and I will include a copyrighted PDF version in the reminder email to be sent on Thursday, October 17th to all participants. If you aren't able to get the slides to me by then, not to worry! We can always send them to the group after the webinar. If you decide you don't want to share the slides, that's ok, too!*
- ***Participants:*** *I will plan on sending the participant list to you the week before the webinar on Thursday, October 24th. If you would like the list a little sooner, just let me know.*
- ***Preparing for the webinar:*** *I will be in the office early on the 31st and will start the zoom meeting at **7:30 am**. Once you sign on, we can get your screen shared and make sure we're both up and running before we open things up for the participants at 8:00 am.*
- ***Starting the webinar:*** *I'll kick things off by welcoming everyone; going over the format of the webinar including breaks, questions & answers, etc; and will briefly introduce you. I will then turn it over to you.*
- ***Questions:*** *We'll plan on taking questions around the break times. I will keep an eye on the chat, and if I see we have a flurry of activity, I will text you.*

If you have any questions or need assistance with anything, please don't hesitate to contact me!

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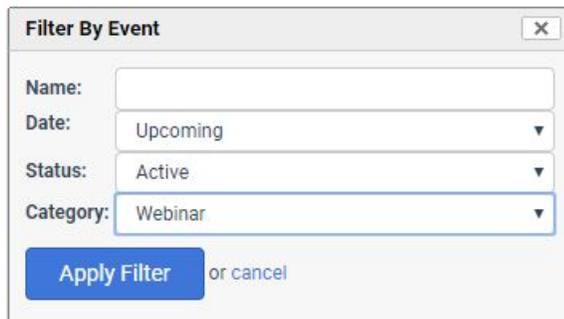
- ..continued steps to do after phone call with faculty
 - Create the zoom link for the webinar
 - Make sure it is in PST
 - Make sure to click the box to enable the virtual waiting room
 - You do not need to require a meeting password.

Meeting Options

- Require meeting password
- Enable join before host
- Mute participants upon entry 
- Use Personal Meeting ID 621-176-1196
- Enable waiting room
- Record the meeting automatically on the local computer

Two Weeks prior to webinar

- Send out instructions to the group on how to proceed with the webinar
 - Email template is in YM - Go to **Directory & CRM**, on the left-hand panel click **@ Email & Newsletters**, then click **Custom Email Templates**. The custom email is on the last page titled **Webinar Instructions Emailed to Participants**
 - If you want, you can email this to them through YM (recommended)
 - Go to **Directory & CRM**
 - Click **Profile Activity** towards the bottom of the page
 - Scroll down until you get to the area sub-titled **Member Event Registration**
 - Select the last radio button in that section (the default drop-down section is on *"Has not registered for a specific event"* **click the down arrow** to change it to *"Has registered for a specific event"*)
 - To the right of that field you will see **Select an Event**, click that.
 - Change the Date, Status, and Category fields to look like the below:



Filter By Event

Name:

Date:

Status:

Category:

or cancel

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- Click **Apply Filter** then find your webinar, click on it's title
- Click **Select Event**
- Click **Search**
- On the following page, you will see a list of the attendees, click Bulk Email All # Records:



- Make sure to add the powerpoint slides if necessary
 - If given to you in a PPT form, make sure to format to a PDF and put a copyright on it (© 2019 IITAP, LLC Reformatted with the permission of Marnie Ferree LMFT, CSAT, 2019)
 - I find it easiest to provide them a link to download the PDFs instead of attaching it to the bulk email. To avoid a really long link I shorten it by going to bitly.com
- Schedule the same email to go out the Tuesday before the webinar is scheduled.

One Week Prior

- Send an email to the faculty with the zoom link and confirm the time (in all timezones) with them and ask them if they have any questions. Remind them that you will be on there about 30 mins ahead of time and will be ready for them whenever they log on.
- Tuesday before the webinar resend the instructions

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Day of Webinar

- Log on into zoom 30 mins before the webinar
- If for some reason participants are logged on already and NOT in the waiting room put them there.
 - To do this, click on their name and there will be a dropdown. Select “put in waiting room”
- Once Faculty logs on make sure to make them a co-host so they can share slides
 - Ask them if they feel comfortable with this or if they have questions.
 - Remind them that you are going to go over a few housekeeping notes and then you will turn it over to them.
- On the minute (8:00am PST) allow everyone into the virtual meeting room and make the following announcements;
 - First make sure they can hear you by asking them to give you a thumbs up as most of them will be muted
 - INTRODUCE YOURSELF!!!
 - Welcome them to the webinar
 - Make sure to say the topic of the webinar
 - Go over housekeeping notes:
 - Explain how questions will be handled and make sure to spell out your email address.
 - Recording of the webinar is NOT allowed and is disabled on the zoom platform. Screenshotting is also not permitted and we ask that you respect those boundaries.
 - Go over how they will be getting CEs
 - Go over computer/ MAC issues
 - Go over breaks
 - Introduce the faculty

Example of Introduction:

Hello! My name is Amanda Bird and I am the Program and Development Manager with IITAP! I know that on says that I'm Stefanie Carnes on zoom as we our account is under her name.

We are so excited to have you all here for this IITAP's 15th webinar facilitated by Eric Webber on Treating Substance Abuse in the sex Addiction Polpulations ! Before we get started I have a couple of housekeeping notes to run by you all.

- 1) This is a LIVE webinar and it will not be recorded nor are screenshots available. We ask that you respect these boundaries.*
- 2) We understand that there will be questions during this webinar and welcome them but ask that we handle them by having you either write them down in the chat function or email them to me personally (give email address). Once we are at an appropriate time I will read them to Eric Webber and should there need more dialogue we will ask you to unmute yourself to discuss further.*

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- 3) *The zoom platform is a great way for us to conduct webinars, however, it does seem that for those of you who have a iPhones that are connected to your computer (mostly Macs) that if a call comes in it tends to bump you off the webinar video and you can only then see audio until you restart your computer. Please be mindful of this and possibly put phones that are connected on airplane mode.*
- 4) *We understand that technology can be tricky- should you get kicked off or if something happens, please log on again- we will be continually monitoring the webinar to make sure you can get back on.*
- 5) *In regards to your CEs, your attendance in this webinar will be recorded and 4 CEs will automatically be added to your account. A certificate of completion will also be added to your account, however, it may take up to two weeks for this to be added since it is a manual process.*
- 6) *You will be sent a survey immediately after the webinar. Your feedback is so important and valuable, so we ask that you complete the survey as soon as possible.*
- 7) *There will be at least two breaks during this webinar, please be mindful about returning back from the breaks at the appropriate time.*
- 8) *Again- we would like to thank you for being here we are excited to get started! Today's facilitator is Eric Weber. Eric Webbs the Clinical Director for the Men's Relapse Unit, Men's Phase 2, and the Legal Professional Program at Caron. He holds many certifications and is coming to us from Pennsylvania. I'll let Eric go into a bit more about his background as he gets started. Eric- thank you for being here and let's get started!*

During Webinar

- **Be there or have someone there at all times the faculty is speaking!!!**
 - You are able to turn off our camera, but make sure you are always listening and checking to let people into the webinar if need be
- Check in each participants on YM
 - This can be tricky as people's names don't always match up from their zoom account. It make take some stalking/slooth work. I will also "chat" them individually to ask them their proper names as well. Another option would be to announce at the beginning for each of them to "chat" you their full name so you can mark them off.
- Make sure to help facilitate questions
- Answer any IITAP questions that may come up
- When there are breaks make sure to remind people to come back at the appropriate time
 - Example: *Let's all make sure to come back at 10mins after the hour in whatever time zone you are in.*
- At the end of the webinar make sure to thank the faculty and remind everyone that they will be getting a survey very shortly and to fill it out. You will also include directions on how to access the certificate once it is finished.
- To end the webinar click on "stop meeting for all" to end.

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Immediately After Webinar

- Send out survey
- Connect w/ the faculty by giving them a call to, again, personally thank them and let them know the following:
 - Once the surveys all come in (it takes about a week) you will send them a copy of it so they can see any comments.
 - We will be putting in the check request immediately and they should receive it within 14 days. Should they not get it in that time please make sure to contact us.
- Send Amanda an email letting her know the webinar has finished; if it went well or not and any other notes; how many people were scheduled to attend; and how many actually attended.
 - Amanda will notify send an email to Jan to cut a check for the faculty. Include:
 - Name of Faculty
 - Date of Webinar
 - Title of Webinar
 - Compensation Amount
 - Address of Faculty (can be found on contract)
 - Attach contract if you have it.
 - Jo, Jan and Amanda have contracts, please check with one of them prior to the webinar to either receive.

Survey Email Letter Example:

Good Afternoon,

*Thank you very much for your attendance of **Webinar 15 | Treating Substance Abuse in the Sex Addicton Population**, facilitated by Eric J Webber.*

We ask that you fill out the online survey below (you will have to be logged in to your account to take the survey). We appreciate all comments and thoughts and take the survey entries very seriously.

*Your attendance for this webinar has been recorded, and your account has been updated reflecting 4 CEs earned. You can find confirmation of your CEs by logging into iitap.com and clicking on the Professional Development tab (under Account & Settings). Directions are also attached on how to download and print your certificate. **(THIS IS ON THE LAST PAGE ← DO NOT COPY THIS FOR EMAIL TO PARTICIPANTS)** Please note that it may take up to two weeks for your certificate to be uploaded to your account.*

Thank you for attending and we look forward to connecting virtually and in person in the future.

Survey Link: <https://iitap.com/surveys/?id=1308878>

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One Week After Webinar

- Collect all survey responses and format them so they are in one PDF (this will require you to add the comments into the main PDF).
 - Send the responses to Stefanie & Jo
- Make another copy of the survey results and black out the names
 - Send this to the faculty member

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Directions to Print Out Webinar Certificates:

- Sign in to your IITAP account at www.iitap.com
- Click on the Professional Development Tab

The screenshot shows the 'Professional Development' tab selected in the left sidebar. The main area contains filter options: Status (All Statuses), Certification/Program (All Certifications/Programs), Credit Type (All Types), and Credits Earned (From and To date pickers). An 'Apply Filter' button is visible. Below the filters are action buttons: Export Entries (Unicode), Print Transcript, Print Filtered Entries, and Email Transcript. A table displays webinar entries with columns for Options, Status, Entry Date, Details, Credits, Expires, and Score (%).

Options	Status	Entry Date	Details	Credits	Expires	Score (%)
 	Approved	2/1/2019	Supervisor Completed Survey: Webinar 05: Beyond the Binary: Expanding Gender Identity	4	2/1/2021	0
 	Approved	2/1/2019	IITAP Continuing Education Attended Event: SOLD OUT Webinar 5 Beyond the Binary: Expanding Gender Identity	0	2/1/2021	N/A

- Find your webinar and click on the pencil icon next to it

This close-up view of the table highlights the 'IITAP Continuing Education' entry. A red arrow points to the pencil icon in the 'Options' column, indicating the action to click on to edit the entry.

- A box will come up with your info. Please click on the Attachment link and download or print your certificate

The 'Edit Entry' form displays the following information:

- Note: Self-awarded Certifications/Programs do not display in Certification/Program listings.
- Certification/Program: IITAP Continuing Education
- Credit Type: Webinar
- Entry Date: 2/1/2019
- Description: Completed Survey: Webinar 05: Beyond the Binary: Ex
- Credits: 4
- Credits Expire: 2/1/2021
- Score (%): 0 (if applicable)
- Activity Code: (empty)
- Attachments: **Filename:** [_Webinar 5_Certificate of Attendance.pdf](#)

A red arrow points to the 'Filename' link in the Attachments section.

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Cancellations

Cancellations happen and hopefully they happen ahead of time. Each cancellation can be different, however, here are steps on what to do.

While it is the IITAP representative's responsibility to manage the process of accommodating the registrants' requests in regards to transferring registrations, etc., the front office staff can assist with this process.

1. Let Jo know and ask how we should proceed w/ options.
2. Put a hold on the registration for the webinar so nobody else signs up for it while managing the rest of the cancellation plan.
3. Send an email or message on hangouts to communicate with IITAP staff what is happening.
4. Here are the usual options for cancellations:
 - a. **OPTION #1** Switch to another webinar that we currently have available.
 - b. **OPTION# 2** Offer for them to transfer to a future webinar within the next 12 months.
 - c. **OPTION #3** Keep the paid amount in your IITAP account for it to be used for additional trainings, tokens, or for admission to future IITAP trainings.
 - d. **OPTION #4** Should none of the above work we will refund them the webinar fee.
5. Once that is set out and people email you with changes please make sure the following steps are completed:
 - a. For Option #1:
 - i. Delete them from the original webinar
 - ii. Register them for the webinar requested
 - iii. Put a note in their activity log with this info.
 1. If easiest just copy and paste their email and put in there
 - iv. Email participant back thanking them for their flexibility and confirm with them that they are registered for requested webinar
 - b. For Option #2
 - i. Delete them from the original webinar
 - ii. Put a note in their activity log with this info.
 1. If easiest just copy and paste their email and put in there
 - iii. Email participant back thanking them for their flexibility and let them know that once they are ready to choose a different webinar they can email the front office and they will give them a coupon code to use.
 - c. For Option #3
 - i. Delete them from the original webinar
 - ii. Put a note in their activity log with this info.
 1. If easiest just copy and paste their email and put in there

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- iii. Email participant back thanking them for their flexibility and let them know that once they are ready to use their credit they can email the front office and they will give them a coupon code to use.
- d. For Option #4
 - i. Delete them from the original webinar
 - ii. Put a note in their activity log with this info.
 - 1. If easiest just copy and paste their email and put in there
 - iii. Let the front office know so they can administer the refund
 - iv. Email participant back thanking them for their flexibility and letting them know that they will be receiving a refund. An email will be coming from info@iitap.com with updates on this.

Sample Cancellation Letter (can also be found in email templates on YM):

Webinar Cancellation

Hello @@first_name@@,

Thank you very much for registering for IITAP Webinar 17: Working with Erotic Transference and Countertransference with the Sexually Addicted Client Facilitated by Robert Hudson. Due to some unfortunate circumstances and illness we have to cancel this webinar. We understand how disappointing this can be and are hopefully letting you know in enough time to be able to reschedule your day. Unfortunately we will not be rescheduling this webinar or topic in the near future, therefore we would like to give you the following 4 options for replacements of this webinar:

Proceed to give them the options **(see example in YM where email templates are located)**