MERIT–Application Guide

A Quick-Steps Guide for the Conference/Special Event/Practitioner Application
The Managed Education and Registry Information Tool (MERIT) is operated by the Washington State Department of Early Learning

Washington State Department of Early Learning

Professional **D**evelopment **P**athways

merit.del.wa.gov

Application Basics

The conference / special event / practitioner training application is intended for trainers and organizations who do not provide training on a frequent basis, but offer quality educational opportunities across the state and would like to offer STARS hours.

An organization or individual must sponsor the event and identify an individual with a STARS ID who can submit the application in MERIT. For example, an organization administrator who has access to the organization's account in MERIT will not be able to access the application if they have not applied for a STARS ID. Instructions for applying for a STARS ID can be found in the "User Manual for Early Care & Education and School-Age Professionals" available on the MERIT homepage. Once the STARS ID is assigned, the conference / special event / practitioner application will become available on the "Applications" tab in MERIT.

Additional requirements are that the individual must complete an application at least three weeks prior to the event. MERIT will not allow applications to be submitted if the event occurs in less than three weeks' time.

This application is a very quick form that asks for information on the overall event, session and presenter. If there is more than one session, the sponsoring entity must complete brief information on each session in order to accurately grant STARS hours.
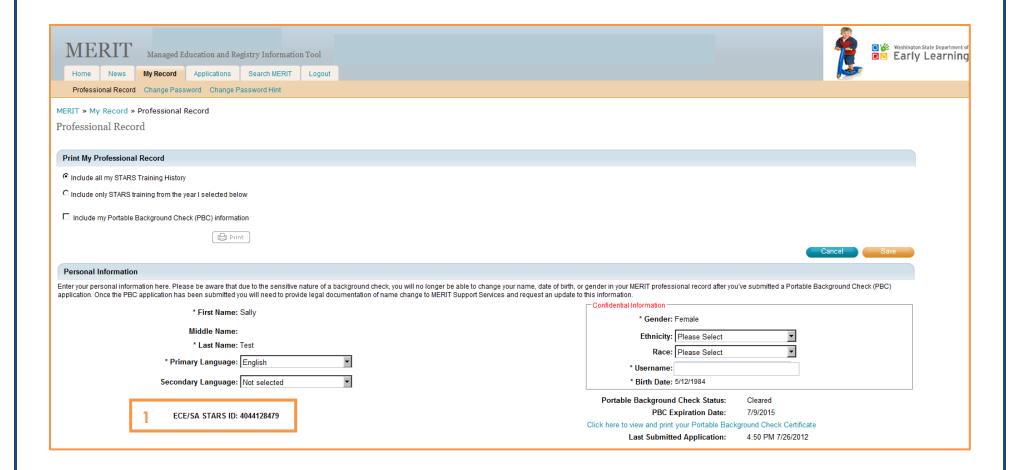
Once the application is approved and the event takes place, the sponsoring organization must also agree to complete the training roster(s) after the event to connect this training to participants' training histories.

This application guide includes steps on:

1. Accessing the application in MERIT
2. Submitting the application in MERIT
    a. Step 1: Event Information
    b. Step 2: Session Information
    c. Step 3: Review & Submit
3. Accessing the attendance rosters after the event
4. Managing the attendance rosters after the event
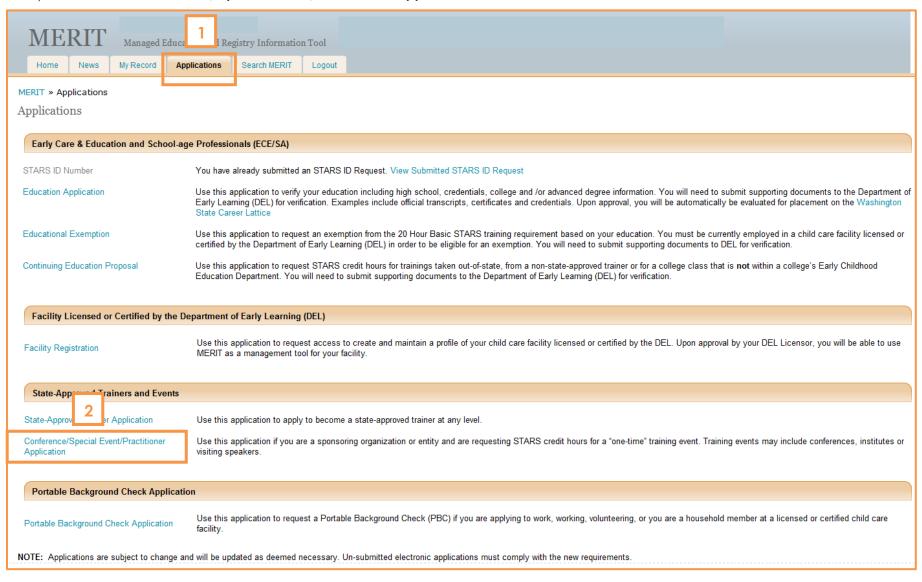5. Exporting the attendance roster

Accessing the Application

1) To acces the conference/special event/practitioner application, you first need a professional record in MERIT with a STARS ID. If you have not already applied for a STARS ID, you can find instructions for this in the "User Manual for Early Care & Education and School-Age Professionals" available on the MERIT homepage.
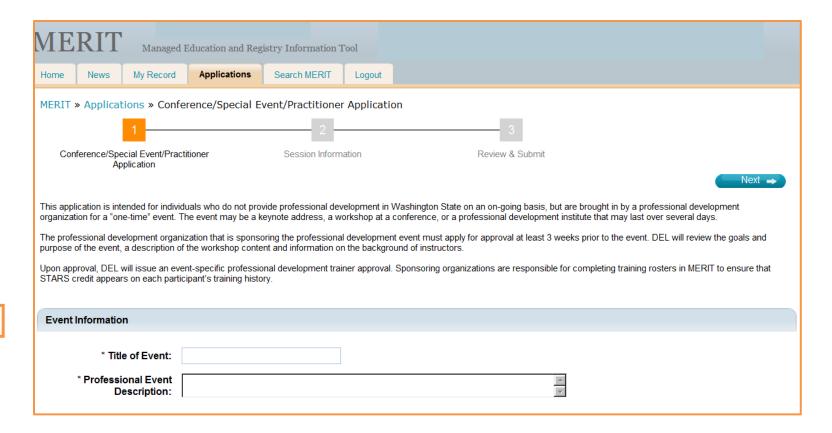
Accessing the Application (continued)

2) Once you are signed in to your professional record with STARS ID, select the "**Applications**" tab.

3) Select the "**Conference / Special Event / Practitioner Application**."

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MERIT » Applications

Applications

Early Care & Education and School-age Professionals (ECE/SA)

STARS ID Number — You have already submitted an STARS ID Request. View Submitted STARS ID Request

Education Application — Use this application to verify your education including high school, credentials, college and /or advanced degree information. You will need to submit supporting documents to the Department of Early Learning (DEL) for verification. Examples include official transcripts, certificates and credentials. Upon approval, you will be automatically be evaluated for placement on the Washington State Career Lattice

Educational Exemption — Use this application to request an exemption from the 20 Hour Basic STARS training requirement based on your education. You must be currently employed in a child care facility licensed or certified by the Department of Early Learning (DEL) in order to be eligible for an exemption. You will need to submit supporting documents to DEL for verification.

Continuing Education Proposal — Use this application to request STARS credit hours for trainings taken out-of-state, from a non-state-approved trainer or for a college class that is **not** within a college's Early Childhood Education Department. You will need to submit supporting documents to the Department of Early Learning (DEL) for verification.

Facility Licensed or Certified by the Department of Early Learning (DEL)

Facility Registration — Use this application to request access to create and maintain a profile of your child care facility licensed or certified by the DEL. Upon approval by your DEL Licensor, you will be able to use MERIT as a management tool for your facility.

State-Approved Trainers and Events

State-Approv...r Application — Use this application to apply to become a state-approved trainer at any level.

Conference/Special Event/Practitioner Application — Use this application if you are a sponsoring organization or entity and are requesting STARS credit hours for a "one-time" training event. Training events may include conferences, institutes or visiting speakers.

Portable Background Check Application

Portable Background Check Application — Use this application to request a Portable Background Check (PBC) if you are applying to work, working, volunteering, or you are a household member at a licensed or certified child care facility.

NOTE: Applications are subject to change and will be updated as deemed necessary. Un-submitted electronic applications must comply with the new requirements.

Step 1: Event Information

1) Step 1 asks for general information about the event. In the case of a conference, this would include the main conference details. For one time events, this would include information specific to that event.

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MERIT » Applications » Conference/Special Event/Practitioner Application

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Conference/Special Event/Practitioner   Session Information   Review & Submit
Application

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This application is intended for individuals who do not provide professional development in Washington State on an on-going basis, but are brought in by a professional development organization for a "one-time" event. The event may be a keynote address, a workshop at a conference, or a professional development institute that may last over several days.

The professional development organization that is sponsoring the professional development event must apply for approval at least 3 weeks prior to the event. DEL will review the goals and purpose of the event, a description of the workshop content and information on the background of instructors.

Upon approval, DEL will issue an event-specific professional development trainer approval. Sponsoring organizations are responsible for completing training rosters in MERIT to ensure that STARS credit appears on each participant's training history.

1

Event Information

* **Title of Event:** [   ]

* **Professional Event Description:** [   ]

Step 1: Event Information (continued)

2) **Publicly Available.** You can check this box if you would like the event to display in the online calendar in MERIT, accessed through the "Search MERIT" feature.

3) **Is the event affiliated with an Organization?** If the event is affiliated with an organization currently listed in MERIT, select "Yes" and begin typing the name of the organization. A list of possible matches will appear. Select the correct organization. If you don't see the organization, click here to learn more **about adding organizations to MERIT**.

   Affliating an organization will:

   • Allow professionals to search for the training either by your name or by the organization name in the online calendar using the **Search MERIT** feature.

   • Give the affiliated organization the ability to view reports on trainings with which they are associated.

4) **Allow the Organization to adminster the training roster?** Check this box if you need administrative assistance in completing the attendance rosters.

2

Publicly Available: ☐ Please check this box if you would like the event to be advertised across the state and open to all participants.
Do not check this box if you have a set participant list and are not opening the training to additional participants.

3

* Is the event affiliated with an Organization? ⦿ Yes ◯ No

To search for an organization, click in the field labeled "Organization" and begin typing the organization name. The system will display a list of active organizations based on the entry in the Organization field.

* Organization: [_____ ▼]
*

4

Allow the Organization to administer the session rosters? ☐

Step 1: Event Information (continued)

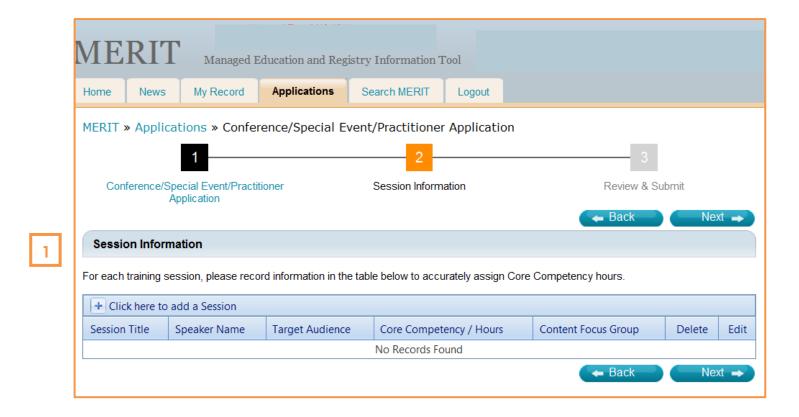5) Complete the fields with the appropriate information for the **time, location** and **contact details**.

5

* **Event Start Date:** [ ] 🗓 mm/dd/yyyy	* **Event End Date:** [ ] 🗓 mm/dd/yyyy
* **Registration Phone:** [ ] (555)555-5555 ext. 1234	* **Cost:** [Fixed ▾]
* **Contact Phone:** [ ] (555)555-5555 ext. 1234	**Amount:** [ ]
Registration Website: [ ]	

Address 1: [   ]

Address 2: [   ] (optional) Apt, floor, suite, etc.

City: [   ]   **State:** [Washington ▾]

Zip Code: [   ] 12345-6789   **County:** [Please Select ▾]

Country: [United States ▾]

6) **Event Target Audience** is intended to gather information on the type of audience for whom this event is designed. For example, if you are providing training specifically for care givers who work in licensed family child care, select "Family Home."

6

Event Target Audience

* Check all audiences for the event is targeting

☐ Check/Uncheck All

☐ Administrators   ☐ Child Care Center   ☐ Early Childhood Education and Assistance Program (ECEAP)   ☐ Family Home
☐ Family, Friend & Neighbor   ☐ Head Start   ☐ K-12 Educators   ☐ Military
☐ P-3 Educators   ☐ Parents/Relatives   ☐ School-Age   ☐ Trainers
☐ Tribal Nations

Next ➡

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7) Click "**Next**" to save and continue.

Step 2: Session Information

1) Step 2 asks for information about the session(s) included as part of the main event. In the case of a conference, this would include adding a session for each training, workshop, etc. provided during the conference. Each session will be viewed as a separate 'training' with its own attendance roster.

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Conference/Special Event/Practitioner Application   Session Information   Review & Submit

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Session Information

For each training session, please record information in the table below to accurately assign Core Competency hours.

+ Click here to add a Session

Session Title	Speaker Name	Target Audience	Core Competency / Hours	Content Focus Group	Delete	Edit
No Records Found						

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Step 2: Session Information (continued)

2) Complete the field with the appropriate information regarding **the title, speaker, session time** and **date**.

3) **Target Audience** is intended to gather information on the type of audience for whom this session is designed. For example, a conference with multiple training sessions may be intended for a wide range of audiences, but a specific session may be focused on a particular group.

4) **Core Competency / Hours** will allow you to select the CC areas which apply to the specific session, and the hours for each area. The hours assigned must match the session length.

2

Session Information

| * Title of Session: | | * Start Date: | mm/dd/yyyy | * Session Length | |
| * Speaker Name: | | * Start Time: | | * End Time: | |

3

Target Audience

* Check all audiences the training session targets:

☐ Check/Uncheck All

☐ Administrators   ☐ Child Care Center   ☐ Early Childhood Education and Assistance Program (ECEAP)   ☐ Family Home
☐ Family, Friend & Neighbor   ☐ Head Start   ☐ K-12 Educators   ☐ Military
☐ P-3 Educators   ☐ Parents/Relatives   ☐ School-Age   ☐ Trainers
☐ Tribal Nations

4

Core Competency / Hours

* Identify the core competency areas that apply to the training. A minimum of 1 hour must be spent on any competency area to be counted.

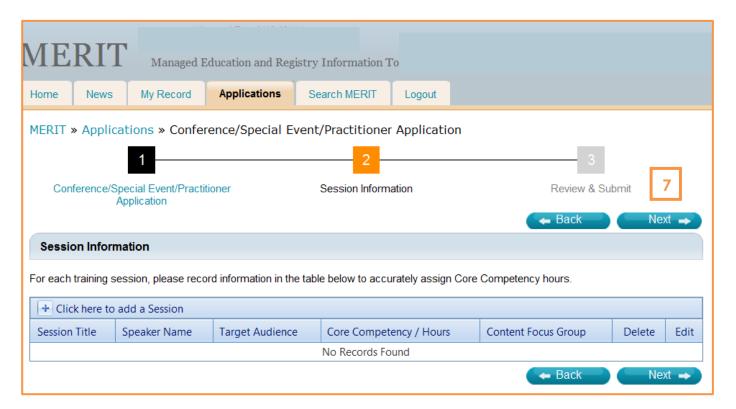|	Early Care & Education Professionals	Hours		School-Age Professionals	Hours
☐	Child Growth & Development		☐	Child/Adolescent Growth and Development	
☐	Curriculum & Learning Environment		☐	Learning Environment & Curriculum	
☐	Ongoing Measurement of Child Progress		☐	Child/Adolescent Observation & Assessment	
☐	Families & Community Partnerships		☐	Families, Communities & Schools	
☐	Health, Safety & Nutrition		☐	Safety & Wellness	
☐	Interactions		☐	Interactions with Children/Youth	
☐	Program Planning & Development		☐	Program Planning & Development	
☐	Professional Development & Leadership		☐	Professional Development & Leadership	
			☐	Cultural Competency & Responsiveness	
			☐	Youth Empowerment	

Step 2: Session Information (continued)

5) **Content Focus Group** is intended to gather information on which age group the content of the training session is focused.

6) Click "**Add Another**" if you have multiple sessions to include. Click "**Save**" when you are finished and/or have only one session to include.
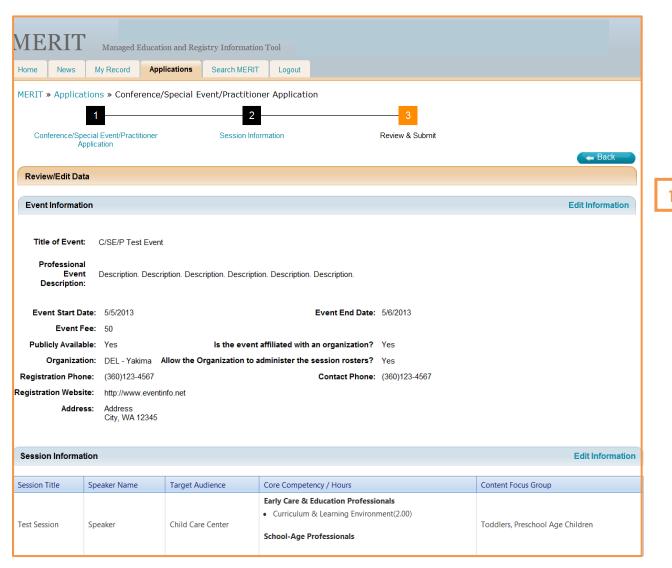
5

Content Focus Group

*

☐ Check/Uncheck All

☐ Prenatal ☐ Infants ☐ Toddlers ☐ Preschool Age Children
☐ Pre-Kindergarten Children ☐ School-Age Children ☐ Youth ☐ Special Needs
☐ Parents ☐ Staff ☐ Administrators ☐ Other

If Other: _____

6

[Cancel] [Save]
[Add Another]

7) Click "**Next**" to save and continue.

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Conference/Special Event/Practitioner Application   Session Information   Review & Submit

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Session Information

For each training session, please record information in the table below to accurately assign Core Competency hours.

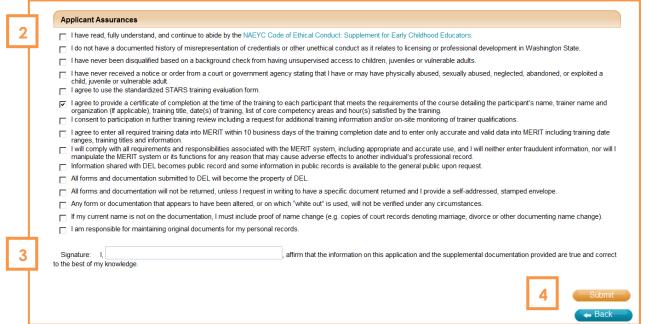| ➕ Click here to add a Session					
Session Title	Speaker Name	Target Audience	Core Competency / Hours	Content Focus Group	Delete	Edit
No Records Found						

[← Back] [Next →]

Step 3: Review & Submit

1) Step 3 asks you to review the information you have submitted to ensure accuracy and completeness. Each section has an "**Edit Information**" link for your convenience.

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Review/Edit Data

Event Information   Edit Information

Title of Event: C/SE/P Test Event

Professional Event Description: Description. Description. Description. Description. Description. Description.

Event Start Date: 5/5/2013   **Event End Date:** 5/6/2013

Event Fee: 50

Publicly Available: Yes   **Is the event affiliated with an organization?** Yes

Organization: DEL - Yakima   **Allow the Organization to administer the session rosters?** Yes

Registration Phone: (360)123-4567   **Contact Phone:** (360)123-4567

Registration Website: http://www.eventinfo.net

Address: Address
City, WA 12345

Session Information   Edit Information

Session Title	Speaker Name	Target Audience	Core Competency / Hours	Content Focus Group
Test Session	Speaker	Child Care Center	**Early Care & Education Professionals** • Curriculum & Learning Environment(2.00) **School-Age Professionals**	Toddlers, Preschool Age Children

1

Step 3: Review & Submit (continued)

2) Review the "**Applicant Assurances**" and check each box.

3) **Electronically sign** the application by typing your full name as it's listed on your professional record.

4) Click "**Submit**."

5) **You'll receive an auto-email** confirming the recipt of your application. This email will include followup instructions for submitting supporting documents for your application, which include **an official description of the event** (examples include: brochure, conference schedule, flyer, etc…) that includes a description of the content of each training. DEL reserves the right to ask for additional information on presenters before approval.

Send these documents to:

Department of Early Learning
Attn: MERIT
PO Box 40970
Olympia, WA 98504-0970

All Conference/Special Event applications will be reviewed within 10 business days of receiving the application and all supporting documents. You will receive an email communication with the approval or denial status of each training session.

Accessing Attendance Rosters

As part of the application agreement, **you are required to complete the attendance roster for the session(s) within 30 days of the completion date**. Each time you add an attendee to the roster using their STARS ID and a "Pass" status, the training will display in their professional record in MERIT. The attendance roster will become unavailable for edit after 30 days and you will need to contact a MERIT administrator for assistance. MERIT staff will monitor this administrative use and intervention, and will review the history if future applications are submitted.

Attendance rosters may be accessed in two ways.

1) If are the **individual** who submitted the application, you will have a new "**Conference / Special Event / Practitioner**" tab in MERIT once you sign in to your professional record. Click here to continue with instructions on managing rosters from this access point.

2) If you are an **administrator for the organization affiliated** with the conference/event, you will see the event/session details in your "Affiliated Trainings" list and have access to edit the attendance rosters from this page. Click here to continue with instructions on managing rosters from this access point.

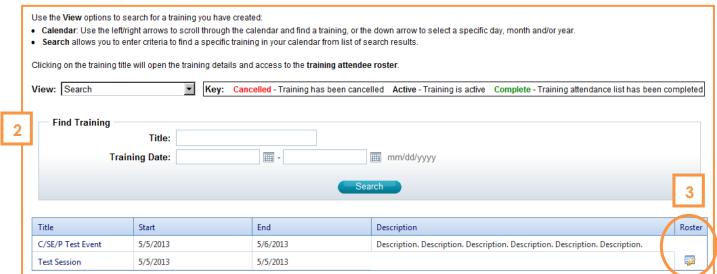# Accessing Attendance Rosters (continued)

For individuals with the "**Conference / Special Event / Practitioner**" tab, you will see all trainings that fall within 30 days of the current date on the right-hand side of your dashboard page (the page that displays by default when you select this tab). **Recent Completed Events** are ready to have the attendance roster updated. **Upcoming/In-Progress Events** have not occurred yet.

1) You may access the attendance roster for your event in either of two ways:
   a. Select the link for the "**Training Calendar**" in either the orange sub-menu or from your general dashboard screen.
      Or
   b. Select the "**Roster**" link in the "Recent Completed Events" section.

2) Enter **at least one search criteria**, such as the date of the event, and click "**Search**."
3) From the list of search results, select the **Edit Icon** in the Roster column.

Accessing Attendance Rosters (continued)

For an **administrator for the organization affiliated** with the conference/event, you will see the event/session details in your "Affiliated Trainings" list and have access to edit the attendance rosters from this page.

1) Click "**Search**" to see all affiliated trainings, or enter at least one search criteria to narrow your search results.

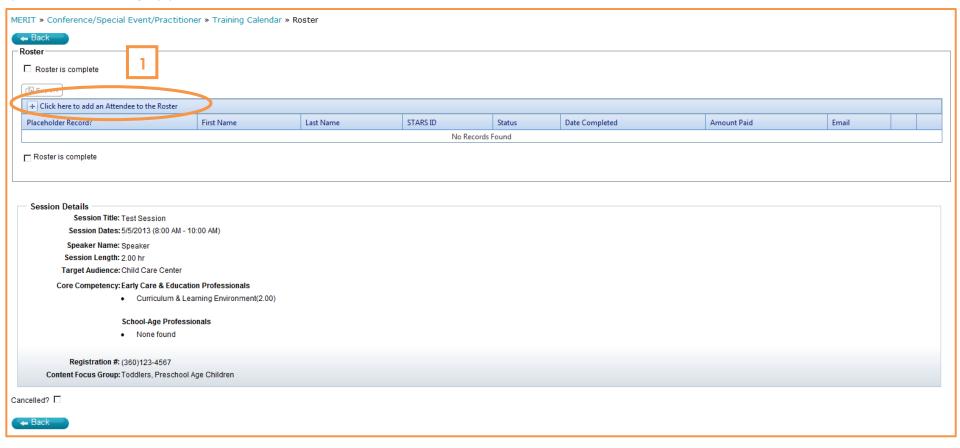2) From the list of search results, select the **Edit Icon** in the Roster column.

Managing Attendance Rosters

As part of the application agreement, **you are required to complete the attendance roster for the session(s) within 30 days of the completion date**. Each time you add an attendee to the roster using their STARS ID and a "**Pass**" status, the training will display in their professional record in MERIT.

The attendance roster will become unavailable for edit after 30 days and you will need to contact a MERIT administrator for assistance. MERIT staff will monitor this administrative use and intervention, and will review the history if future applications are submitted.
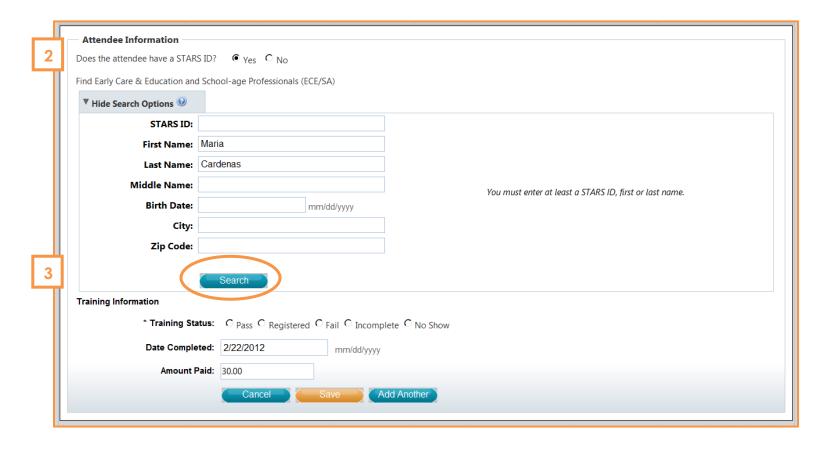
To do this:

1) Select the **plus sign** (+) next to **Click here to add Attendee to Roster**.

Managing Attendance Rosters (continued)
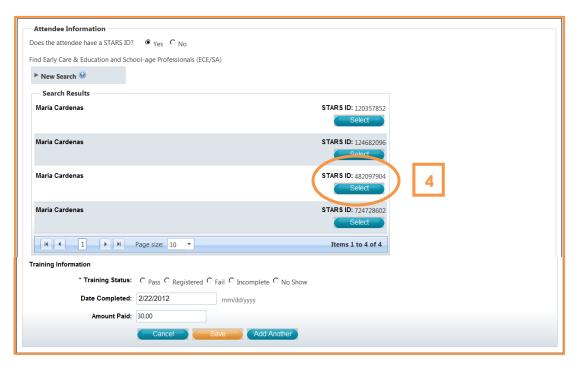
2) **Does the attendee have a STARS ID?**

    A) If the attendee provided a STARS ID, select **Yes** and **continue to Step 3**.

    B) If the attendee did not have or provide a STARS ID at the time of the training, select **No** and **skip to Step 10**.

3) Use the search fields to enter at least one or more search criteria and select **Search**.

    Fewer search fields yield larger search results. Filter these results by adding more search criteria as needed.

Attendee Information

2

Does the attendee have a STARS ID? ⦿ Yes ○ No

Find Early Care & Education and School-age Professionals (ECE/SA)

▼ **Hide Search Options** ⓘ

STARS ID:	
First Name:	Maria
Last Name:	Cardenas
Middle Name:	
Birth Date:	mm/dd/yyyy
City:	
Zip Code:	

You must enter at least a STARS ID, first or last name.

3

Search

Training Information

* Training Status: ○ Pass ○ Registered ○ Fail ○ Incomplete ○ No Show

Date Completed: 2/22/2012 mm/dd/yyyy

Amount Paid: 30.00

Cancel   Save   Add Another

Managing Attendance Rosters (continued)

4) **Select** the correct professional/STARS ID record from the list of search results.

5) **Training Status.** Select the appropriate status: **Pass** for successful training completion; **Registered** for future trainings; **Fail**, **Incomplete**, or **No Show** as appropriate for non-successful training completion. Only a **Pass** status will update an attendee's professional record in MERIT.

Managing Attendance Rosters (continued)

6) **Date Completed**. The training completion date will automatically populate this field, but may be edited if the attendee completed the training on a different date. This occurs most frequently for unscheduled trainings such as self-paced/correspondence or online trainings.

7) **Amount Paid**. The amount paid will automatically populate this field based on the training details, but may be edited if the attendee has paid a different amount.

8) Select "**Save**" if finished, or "**Add Another**" to add more attendees.

9) A successful addition to the training roster will display. Use the **Edit Icon** located on the far right of the record as needed.
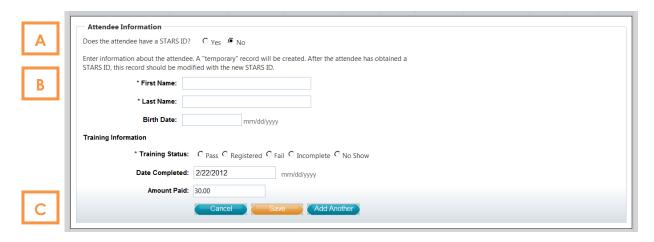
Managing Attendance Rosters (continued)

10) **Placeholder Records**. Continuing from Step 2-B, if the attendee did not have or provide a STARS ID at the time of the training, you can either use the search fields to find the STARS ID or you can create a Placeholder Record. **Creating an electronic attendance record is your verification of training attendance**. Placeholder records will eliminate the paper trail for trainings and allow you to keep an accurate electronic record of attendance, regardless of whether the attendee had a STARS ID.
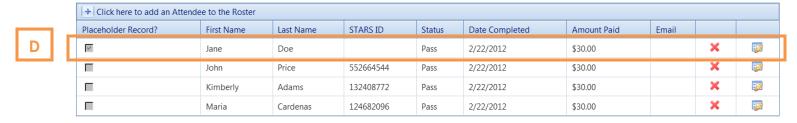
We ask that you **create placeholder records for all attendees without STARS IDs** as this will allow DEL MERIT staff to verify attendance if we are contacted by a professional at a later date who requests to be added to a training roster.

To do this:
A) Select **No** for the question **Does the attendee have a STARS ID?**
B) Enter the attendee's details to create a placeholder record. A minimum of first name, last name and training status is required.
C) Select **Save**.

D) A placeholder record will display with a designation in the training roster column, and a STARS ID will not be present.

E) You may **edit the placeholder record** by selecting the **Edit Icon** and selecting **Yes** for the question **Does the attendee have a STARS ID?** and following steps 5 – 10 to add the attendee using their STARS ID.

Exporting Attendance Rosters

Export. The attendance roster can be exported to a Microsoft Excel file, allowing you to print a sign in sheet for your training. Adding registered attendees to the roster will also allow them to confirm their information at the time of the training.

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Attendance List									
☐ Roster is complete									
📑 Export									
+ Click here to add an Attendee to the Roster									
Placeholder Record?	First Name	Last Name	STARS ID	Status	Date Completed	Amount Paid	Email		
☐	Hafifa	Abdi	4002977371	Pass	3/1/2012	$20.00	ibraabdi@msn.com	✖	📝
☐	Kara	Barnett	450458933	Pass	3/1/2012	$20.00		✖	📝
☐	Lucy	Escalante	913471260	Pass	3/1/2012	$20.00		✖	📝
☐ Roster is complete									