AFTER YOU HAVE POSTED YOUR EVENT IN REGI…

…you will want to manage your participants, keep notes, invite leaders, etc. Please keep in mind, REGI is not a substitute for screening your participants, it is a tool to help you keep track of who will be participating in your activity. AMC trips are open to all and as an AMC Boston Chapter leader, you are required to conduct proper screening for any activity that requires registration. This includes getting in touch with all potential participants. (FYI - the following document was pasted directly from the 'Support' Link in REGI)

MANAGE YOUR EVENT AND PARTICIPANTS

At any time, you can manage your upcoming event. Click "My Events" in the Events section on the navigation bar at the top of any REGI page, then choose the event you wish to manage.

This page will display the Event Info as it appears to approved participants as well as tools just for leaders/co-leaders/registrars. Using the menu on the left side of the page, you can manage your roster, update your listing, return to the Share event page, or invite leaders and co-leaders.

Read on for more information about this section of REGI.

Event Info:
This page is visible to leaders and participants. You will see the overview of the event, the full list of confirmed participants, your answers to event registration questions, and a place to update carpool information. Participants and leaders like you, may update their registration here.

Roster:
This is the list of all individuals who registered for your trip. Go to: Roster info

Admin:
Use this section to update your event details or change the status of your trip (for example from OPEN to WAITLIST or FULL. Remember to click the "Update Event" button to save any changes.

Share:
This section will open the Share Event page. Go to: Share info

Invite:
This where you can invite other leaders, co-leaders, or registrars to your event. Go to: Invite info

MANAGE YOUR PARTICIPANTS

Each time someone registers for your event, all leaders and co-leaders for that event will receive an automated email notification (sent to your profile email address). This email will include a link to the Roster page.

You can see the full list of registrants in your event's Roster. To access the Roster, go to My Events, choose the event, and select Roster from the left side of the screen.

Here on the Roster page you can see contact and profile info for each registrant. You can also view and update each registrant's status.

Screen the people with registration status **SUBMITTED.** This means that the registrant signed up for an event but you haven't reviewed them yet.

Registration Status:
As you screen people, you may change their status to one of the following (don't forget to click "Update Roster" if you make changes on this page):

- **APPROVED:** The person has been invited to participate. Changing the status to APPROVED will send an automated email to the registrant letting them know they are officially on the participants list and they can now view the Event Info.

- **PEND ACTION:** Short for pending participant action. Use this status if you are awaiting further action from a registrant: e.g. you left a voicemail for screening and are expecting call back; you are waiting for a payment.
- **WAIT LIST:** When a participant signs up for a trip with the status of WAIT LIST, they will display as SUBMITTED on your roster. Switch their status to WAIT LIST to send an automated message confirming that they are on the wait list. If a spot becomes available, you can change their status to APPROVED.
- **TRIP NOT A FIT:** If you screened a participant and found they do not have the necessary experience, gear, and/or fitness level for your trip, use this status. Make sure you tell the participant why they will not be approved and whenever possible, you should refer this person to another event which may be a better fit for getting outdoors.
- **CANCELED:** If a participant indicated that he/she will not be attending, use this status to free up a spot for someone else.
- **NO SHOW:** After your event, return to your event Roster to indicate if anyone failed show up for the activity without notifying you in advance.

IMPORTANT: You must click on “Update Roster” at the bottom of the page each time you update a participant’s enrollment status.

Notes:
Use the notes section to record information on screening, contact with participants, or payment for participation in an activity or program. To save changes to Notes or Registration Status, click the Update Roster button at the bottom of the page.

Export Roster:
You can print important participant information to take with you on the activity using the “Export Roster” area at the bottom of the Roster page. You may choose a Microsoft Excel spreadsheet or a tab-delimited text file.

This will allow you to sort the list by registration status, last name, payment status, etc.

UPDATE YOUR EVENT STATUS

When you want to update your event status, go to My Events, choose the event, and select Admin from the left side of the screen (this tab is only visible to Leaders, Co-leaders, and Registrars for this trip).

Changing the status here will change what potential participants see when they look through REGI’s trip listings.

Note: If you update the status of your trip on REGI, you will still need to go into your AMC Activities Database (ActDB) listing to update the status there too.

Event Status:
After your event is created, you can change the status as necessary to one of the following (don’t forget to click “Update Event” if you make changes to the Admin page).

- **FULL:** When your trip is full and you want to stop accepting applications, choose this status. This will prevent future sign-ups.
- **WAIT LIST:** If your trip is full, but you want to create a wait list, his status will still allow participants to register so that you can approve them if there are cancellations. This will be the most common selection once a event fills since cancellations are not uncommon.
- **CANCELED:** If you need to cancel your trip, change the status to CANCELED.

The **PENDING** status should only be used before your event has been made live. If you use this status once your trip has been approved on the ActDB, people will no longer be able to sign up for your event.

You won’t use the event status of **CLOSED** until after your event has occurred and your post-trip responsibilities are complete.

FREQUENTLY ASKED QUESTIONS

Once I create a REGI event, how do I post it on AMC ActDB?
Open your event, then select Share in the left column and follow the instructions.

What happens when I switch my event status to WAIT LIST?
WAIT LIST will allow registrants to register, just like OPEN, but lets them know that the trip is already full. All other statuses (PENDING, FULL, CLOSED, CANCELED) do not allow new registrations.

What is the easiest way to email all participants on a trip?
Open your event, then select Roster in the left column. Scroll to the bottom and select Email Approved Participants.

If your email client does not automatically open when you click this link, right-click the link and select Copy Email Addresses. Then compose an email and paste the copied email addresses into the “TO” field.

Can I take payment through REGI?
Payment is not currently handled through REGI. The process for paid events differs by club unit and should be coordinated with your respective club unit.