RegOnline
Online Registration System for CFAES Units

CFAES Business Office, Columbus
http://cfaesfinance.osu.edu

Contents

• Introduction to System
• Setting up an event
• Transferring Money
• Resources
Introduction

What is RegOnline?

• For CFAES events only
• Online system to collect registrant data
• Replaces paper forms, reduces data entry
• Content management system to create constituent address book
• PCI Compliant Credit Card Processor
Cost

$3.50 per registrant

+ 2% of all credit card transactions

Depositing to an earnings fund (1xxxxx)? Add earnings fund rate: http://www.rpia.ohio-state.edu/upa/ Currently 5.7%

Note – you may have variable fees for your events for a variety of reason (different registrant types, early bird registration) but you cannot have a variable fee by payment type. In other words – you can’t charge more for credit card payments just because it costs you more.

Link:  http://www.rpia.ohio-state.edu/upa/
Getting Access

Only OSU Employees may have access to RegOnline. Student employees are permitted to have access.

1. The first time you get access to the system and annually you will need to take PCI Training online.
   - A short, free, online course that you must re-watch annually
   - A form **PCI Training Form** that must be completed confirming you have watched annually. Check the renewal checkbox.

2. Mail form to **buxton.26@osu.edu** or fax to 614-688-0529
   - Note: If you are requesting new access to RegOnline:
     1. put the merchant name as RegOnline and
     2. mark the NEW checkbox instead of the renewal checkbox

---

Setting up a new event

**https://regonline.com/manager/login.aspx**

- Click your name to change your password
- Click **Sign Out** to exit
- Click **Help Center** to search for assistance
- Use the Search box for past event searches

---

Find your Unit in the Folders to the left
Setting up a new event
https://regonline.com/manager/login.aspx

The ID is the event ID and is unique for each event

The title lists all of your previous events and prebuilt templates

Use the Edit Button to edit an existing event

Use the Copy Button to copy a template

Note:
OSU Event Template – includes a place for people inside the University to pay with chartfield
Public Event – excludes the chartfield payment option

Registration Form: Use to edit the details of your event.

Theme Designer: Use this to change the branding for your event.

Event Website: You can use this as the front page for your event.

Work from Start to Confirmation to design your event.

Use Preview and Save Buttons to navigate.

Important:
- Change the Registration URL to something easy.
- Check the Contact information so your registrants can contact you.

FY2014 CFAES Business Office Training (1329728)
(copied from form 827538) (copied from form 864116) (copied from form 864248) (copied from form 870742) Copi
Activate your event

Under Registration Functions – try some test registrations before activating.

Use the URL next to your event title to distribute your event both before and after activation.

Use reports to monitor your event and make changes to event registrant data.

Important:
- Email your Event ID to schrock.73@osu.edu along with the org and fund to which you would like your revenue deposited
- Change the status of your event to Active before officially distributing your event URL.
- The system will prompt you to charge the RegOnline fees back to the participant – CFAES guidelines would suggest you not do choose this option.

Close your event

Change the status when your event is over and everything has been paid.
Revenue

Credit Cards
• Monthly you will receive a journal entry that transfers the revenue you received via RegOnline less the fees associated with all transactions. You will receive a copy of the journal and backup from schrock.73@osu.edu.

Checks and Cash
• Process check and cash deposits within 3 days of receipt.
• Record in RegOnline when the money is received.
• Deposit money using normal operating procedures in your unit.

Internal Transfers
• At the end of your event download an internal transfer report – this should be a custom report in your reports section. This report should show all payments to be made by University chartfield. Check the payments and make sure they are correct. Add the (credit) org and fund for the revenue and email the file in spreadsheet form to schrock.73@osu.edu or enter the journal entry into PeopleSoft yourself (if you have access).

Note: If you are using the OSU Event Template the Registration Confirmation will have this statement in the footer. Please leave this as it serves a purpose for audits.

Removing Access

If you have someone leave the University that has access to RegOnline – email buxton.26@osu.edu to have them removed.

Refunds

Credit Cards
You can process credit card refunds directly online. If you have problems email schrock.73@osu.edu for assistance. Be sure to print documentation for your eReports reconciler each time you do a refund.
Help document here: http://cfaesfinance.osu.edu/training

Checks and Cash
Process cash and check refunds as you would if you weren’t using RegOnline. You can make notes on the transactions in the individuals registration record.

Internal Transfers
Submit an Expense Transfer Form to your Business Office Representative attaching the original journal entry that charged the unit. http://cfaesfinance.osu.edu/forms
Reconciliation

Credit Cards
Use the journal entry and backup received from Rachel to reconcile to your eReports. You can verify Rachel’s calculations by looking at reports in RegOnline.

Checks and Cash
Review deposits as you normally would by comparing ledgers or RegOnline reports to the eReports.

Internal Transfers
Verify journal entries submitted to Rachel were processed by maintaining and electronic version of your journal entry request or expense transfer form and compare it to the eReports.

Common issues

Test your form!
Be sure to do a couple of test registrations before activating an event.

Do not take a credit card number from a customer
A customer must enter their own credit card number on their own computer – you cannot do it for them.

Activate your event!
Activate your event before sending out the URL. Credit cards only process when an event is active.

Ask buxton.65@osu.edu before accepting donations via RegOnline.

Internal Transfers
People will end an event but not submit to get their payments from internal registrants.

Send schrock.73@osu.edu your chartfield. This is the only way she knows where to send your income!
Assistance

• Questions about fees, refunds and reconciliation
  • Rachel Schrock, schrock.73@osu.edu

• Questions about getting access to RegOnline
  • Jesse Buxton, buxton.26@osu.edu

• Questions about setting up an event, customer complaints about the system or difficulties with credit cards?
  • RegOnline: 888-351-9948, Option 2
  • Cindy Buxton, buxton.65@osu.edu