

# Registering for EfM for the 2023–2024 Year

## General Guidelines for Registering in an EfM Canada Program or Event—Mentor Training

*The following steps are modeled on an earlier registration guide originally outlined by Ed McDonough in Toronto. The present document is focused on the steps involved in registering as a participant in a mentor training event and has been edited and updated for the current year. Many thanks to Ed for his significant contributions as we first moved to an online registration process.*

### Introductory Notes and Reminders

All registrants in EfM programs and events must have an account with the online Amilia SmartRec eCommerce platform. If you have not done so already you will need to create an Amilia account— a separate set of guidelines is available for download from the EfM Canada website.

The guidelines have been designed as a hands-on resource and may be downloaded from the EfM website. The document is in PDF format and should be readily opened in a variety of PDF reader applications: Adobe Acrobat Reader, Foxit PDF Reader, Nitro PDF Reader, etc. The downloaded file will then be available for reference as you go through the steps of registering online and the links that are embedded in the file should be active.

As noted above, the current guidelines have undergone significant editing since first introduced. As a result, a number of the screenshots that follow will be out of date (literally) and will not accurately represent all that actually appears on your computer screen. We've done our best to ensure that such anomalies are insignificant and that they will not effect the clarity of the directions offered or the registration process itself. That said, if there are steps that are unclear or lead to unexpected results please let us know—our goal is to facilitate as straightforward and seamless a registration process as possible. Many thanks.



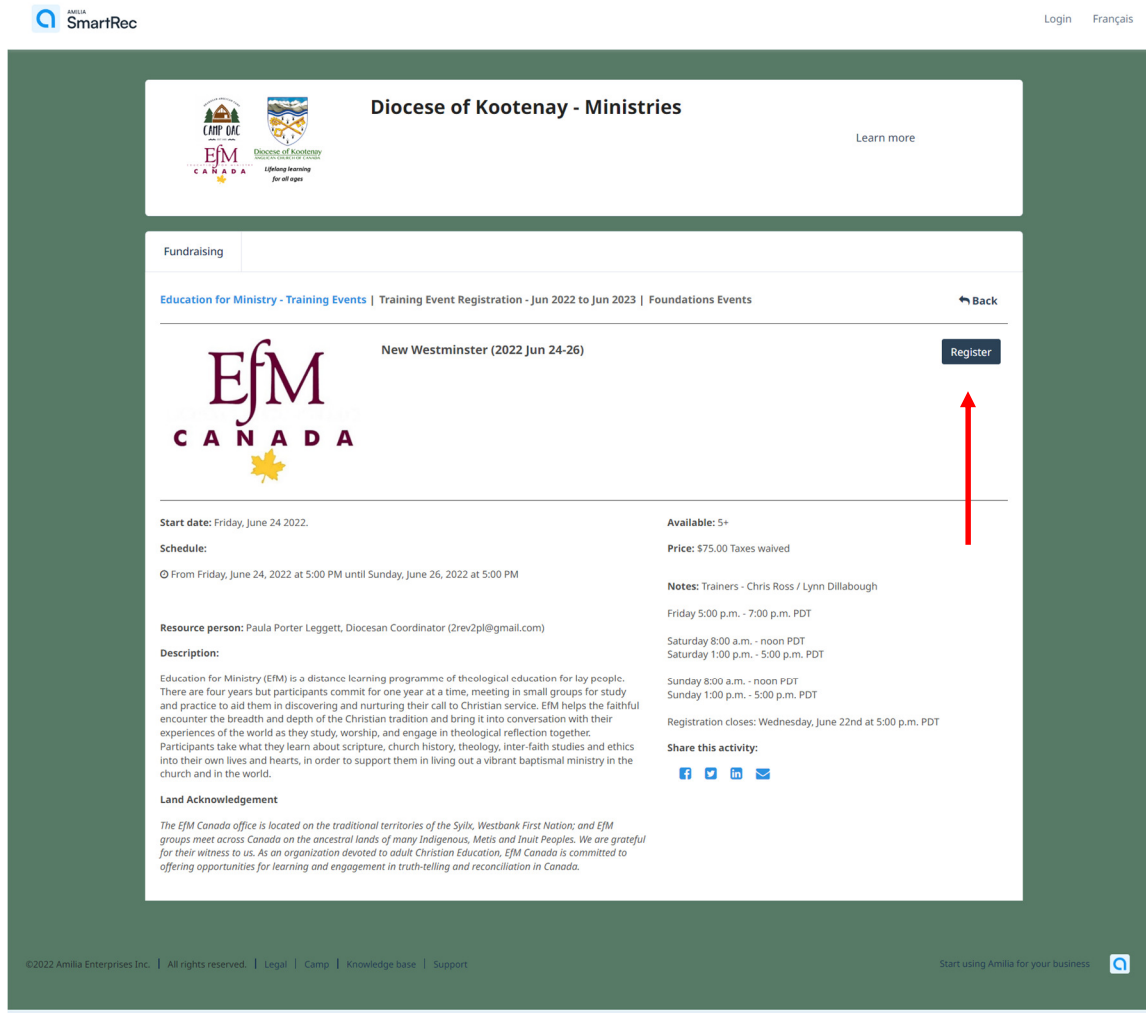
#### **2023 08 09 - Added Note Payment Information**

The fee payment description in your monthly credit card or bank statement will likely appear as follows:

- **NBX\*CAMP OWAISSI**

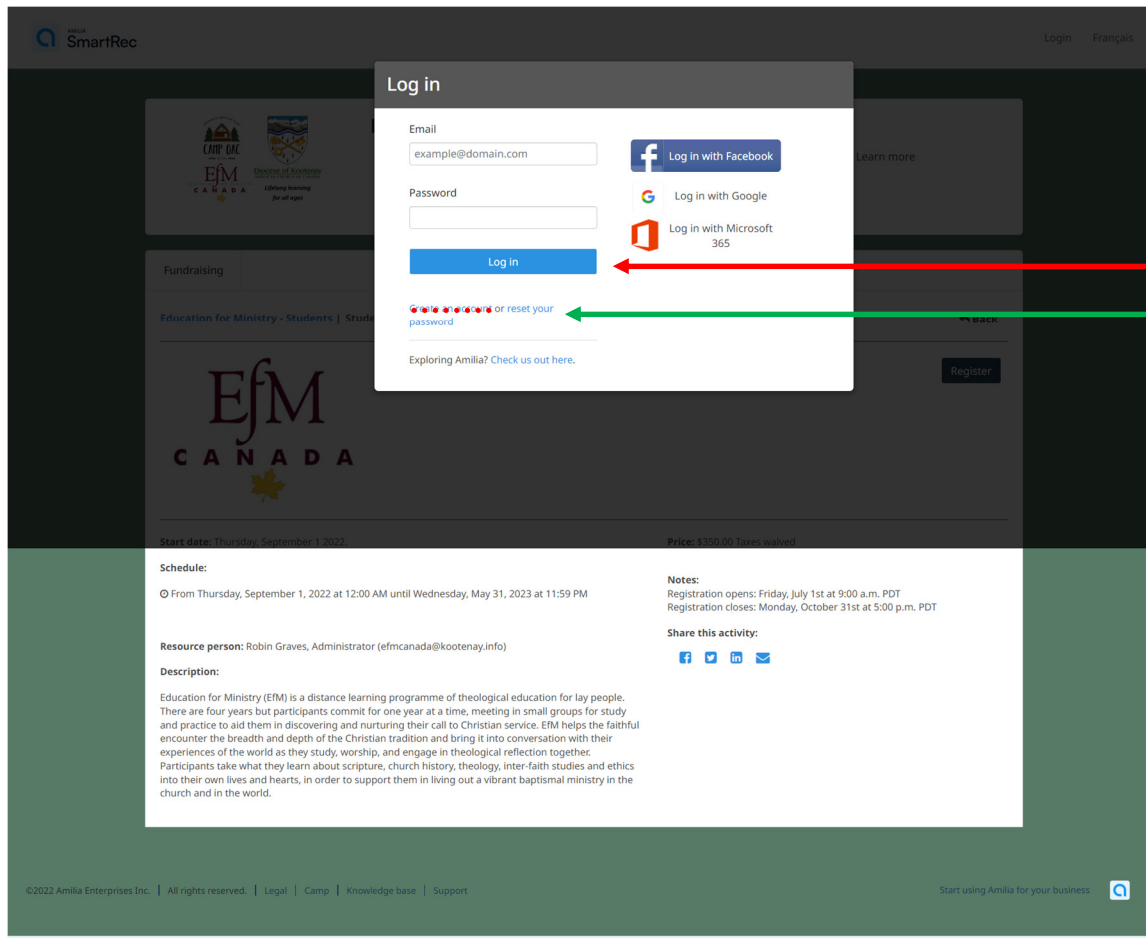
This is **not** an error, EfM Canada shares the Amilia platform with the diocesan camp. Please contact the EfM Canada office as soon as possible by email if you have any questions or concerns regarding your online payment: [efmcanada@kootenay.info](mailto:efmcanada@kootenay.info)

# Beginning the Registration Process

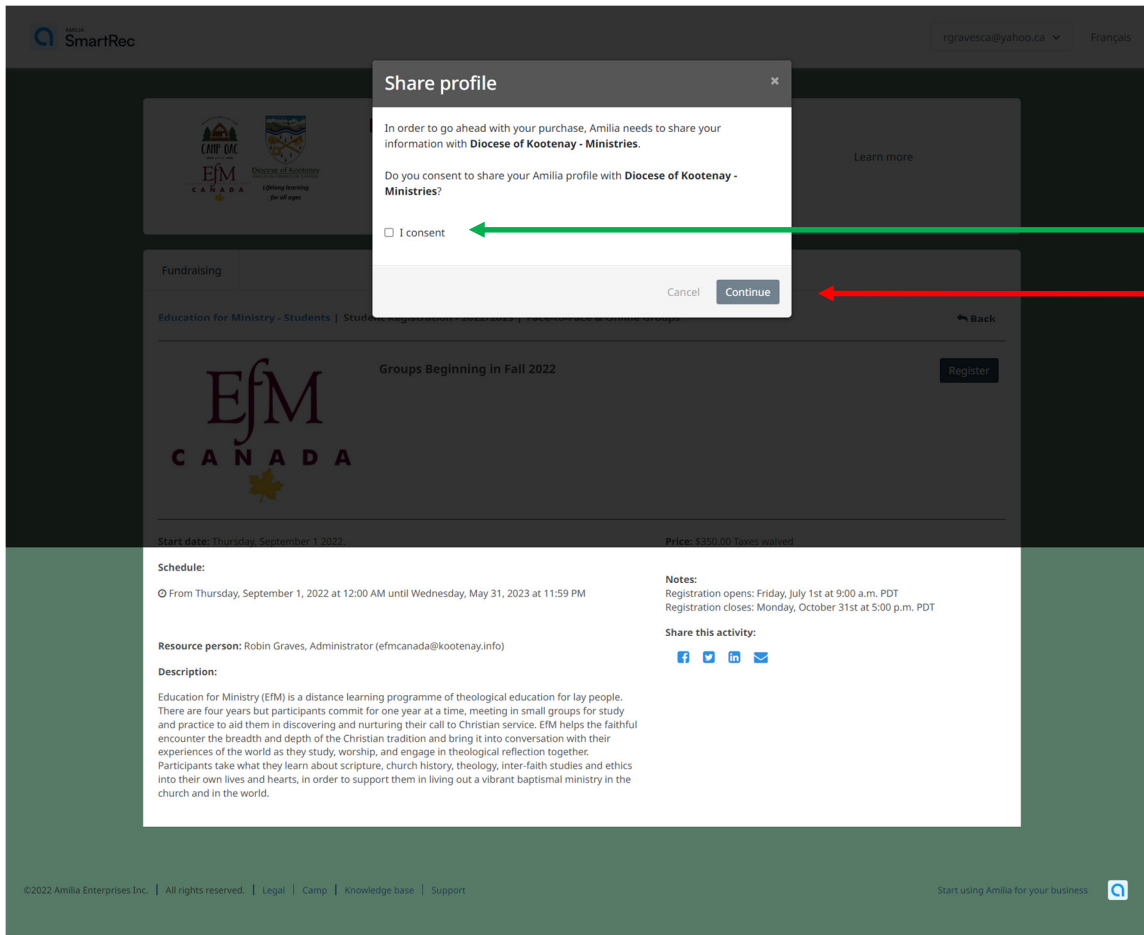


- A window similar to this should open after clicking on the link sent by the Diocesan EfM Coordinator
- If you have not had an opportunity to do so before, please take a moment to read through the Overview description of the EfM program and the accompanying Land Acknowledgement
- Read through the information displayed to confirm that this is the program in which you plan to register
- Mentor Training registration is limited to 8 participants per event; information regarding the number of available registrations that remains is indicated in the lower section of the screen

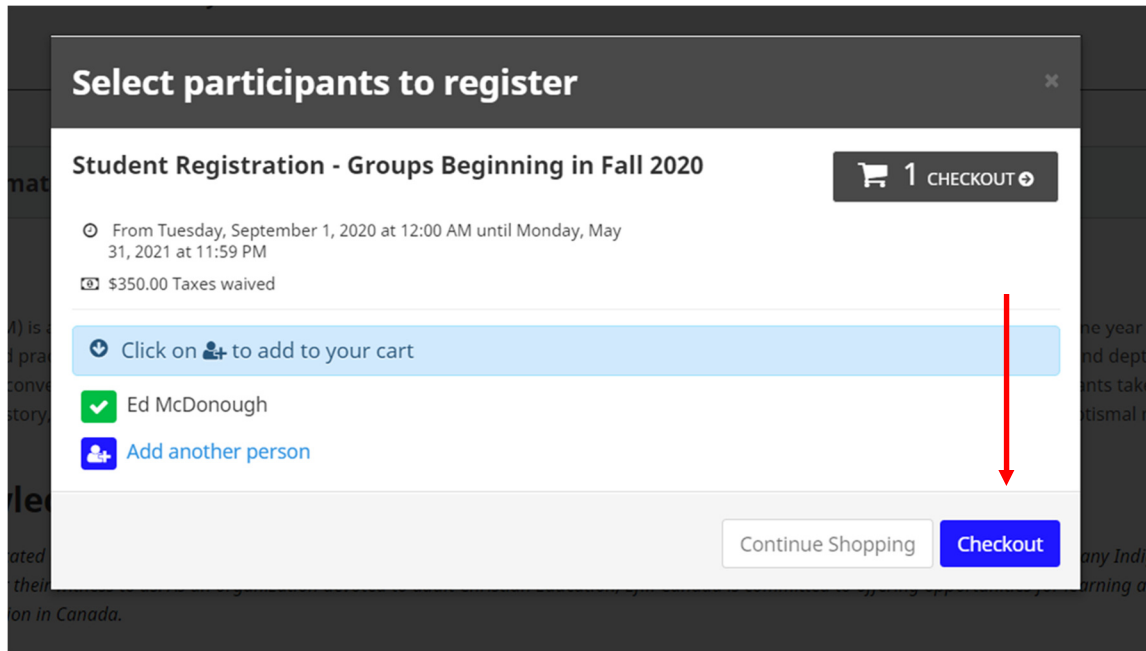
- Click on the **'Register'** button - a Log in screen for Amilia's SmartRec platform will load as illustrated on the next page
- If the **'Register'** button is greyed out or inactive that means that the maximum number of participants has already registered and you will not be able to continue






- Enter the email used when creating your Amilia account - *if you cannot remember the email used or if it has changed:*
  - ⇒ ***please - do not create a second Amilia account*** - contact the EfM office for assistance - [efmcanada@kootenay.info](mailto:efmcanada@kootenay.info)
- Enter the password used when creating your Amilia account - *if you cannot remember the password used:*
  - \* Underneath the ‘**Log in**’ button, click the ‘**Reset your password**’ link highlighted with the green arrow above
  - \* Enter your email address and click ‘**Send email**’
  - \* Go to your mailbox and open the email to click on the link provided
  - \* This brings you to a page where you can enter your new password
  - \* Test it by logging in with your new password
- Click on the ‘**Log in**’ button highlighted by the red arrow

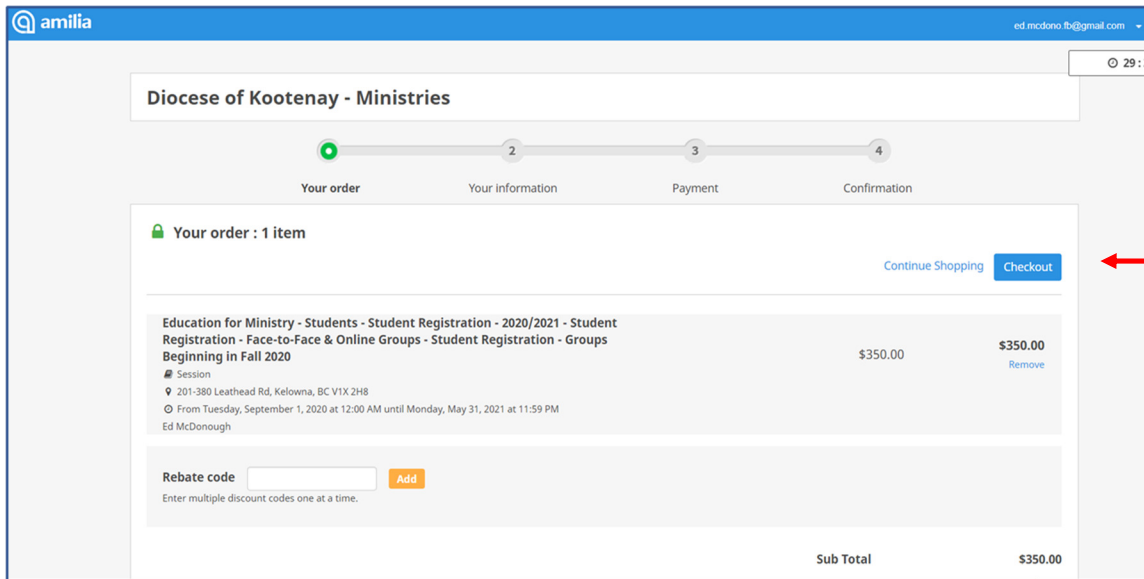


- If this is the first time that you have used your Amilia account to register in an EfM program or activity you may need to authorize Amilia to share you information with the Diocese of Kootenay as the sponsor of the national program
  - \* this should be a one time request—it is not expected that similar consent will be required with future registrations
- Check the **‘I consent’** checkbox, highlighted with the green arrow above
- Click on the **‘Continue’** button, highlighted with the red arrow above
- This should take you to the **‘Select participants to register screen’**



- The **'Select participants to register'** screen will identify the program information associated with your current registration - a reminder - the illustration above is out of date, the screen that you see will differ somewhat in appearance
- Your name should appear first on the list next to a selection icon 
  - click on the icon or on your name – a green tick box should appear 
  - the cart at the top right hand side of the screen should now reflect the added registration 
- Click on the **'Checkout'** button
- You should see a summary of your **'Order'**, similar to what is shown on the following page

# Your order



- **'Your order'** - again, your screen will appear somewhat differently from the one illustrated above
  - please review all the information on your screen to confirm that it is correct
- Note: Amilia allows 30 minutes to complete a transaction; you will see a timer in the top right hand corner of the screen identified by the green arrow, which indicates how much time is left in the current transaction
  - most find that this is a generous amount of time and are able to complete their transactions within 20 minutes; very few have run out of time and have had to repeat the process
- When your registration information has been confirmed click on the **'Checkout'** button, highlighted by the red arrow
- This takes you to a section that will detail **'Your information'** - this is in two parts and includes general information that appears in your record as the **'Account owner'** and **'Personal information'** that is particular to the EfM program in which you are registering
  - the **'Account owner'** window will be similar to the one illustrated on the following page

## Your information - Account owner

Your order    **Your information**    Payment    Confirmation

**Your information** Validate all sections to continue your purchase. [Add more items](#)

**Account owner**  
Ed McDonough

**Account owner : Ed McDonough**

First name  Last name

Address 1

Address 2 (optional)

Country  State/Province

City  Zip/Postal Code

Email

Home Phone  Work Phone

Cellular  Extension (optional)

Please make sure to fill at least one phone number

[Continue my purchase](#)

- Complete the **'Account owner'** screen with your details; please ensure that all information that has been recorded is complete and accurate
- Then click on the **'Continue my purchase'** button – this will take you to the **'Personal information'** window – a partial illustration is seen on the next page
- The information requested will differ for each activity / event—Student Registration, Mentor Registration, Mentor Training Event Registration, Continuing Education for Graduates Registration – all information should be current and entered in the format requested

## Your information - Personal information re EfM program or event

Account owner  
Ed McDonough ✓

**Ed McDonough**

**Personal information : Ed McDonough**

Date of birth:  This information can be modified in your account settings.

**Email**

Date of Birth using YYYY MM DD format. While not required, the information assists with planning and program development. (optional)

EfM Sewanee provides a graduation certificate for each student upon completion of the four year program. Please indicate how you would like your names to appear on the printed certificate, including preceding or middle names or initials as preferred. Examples: Elizabeth Smith, Elizabeth Mary Smith, Elizabeth M. Smith, E. Mary Smith, E. M. Smith

Level of Education (optional)

Diploma (optional)       Bachelor's (optional)       Master's (optional)  
 Doctorate (optional)       Other (optional)

Indicate your work or occupation - please enter "Retired" if applicable. (optional)

- Complete your **'Personal information'**; many of the questions are required to complete your registration, some are optional; please make sure you answer all of the questions as best you can

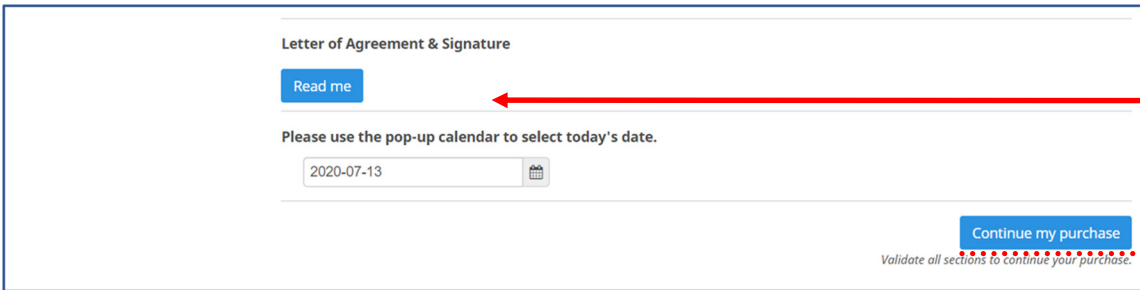
***NOTE:*** information entered for any previous registration will be carried forward and should appear on your screen

***It is important that you review each question carefully and update all information as needed***

- At the end of the **'Personal information'** screen you will see a request to sign a **'Letter of Agreement'** and to select today's date from the calendar, as shown on the following page



## Letter of Agreement & Signature



Letter of Agreement & Signature

[Read me](#)

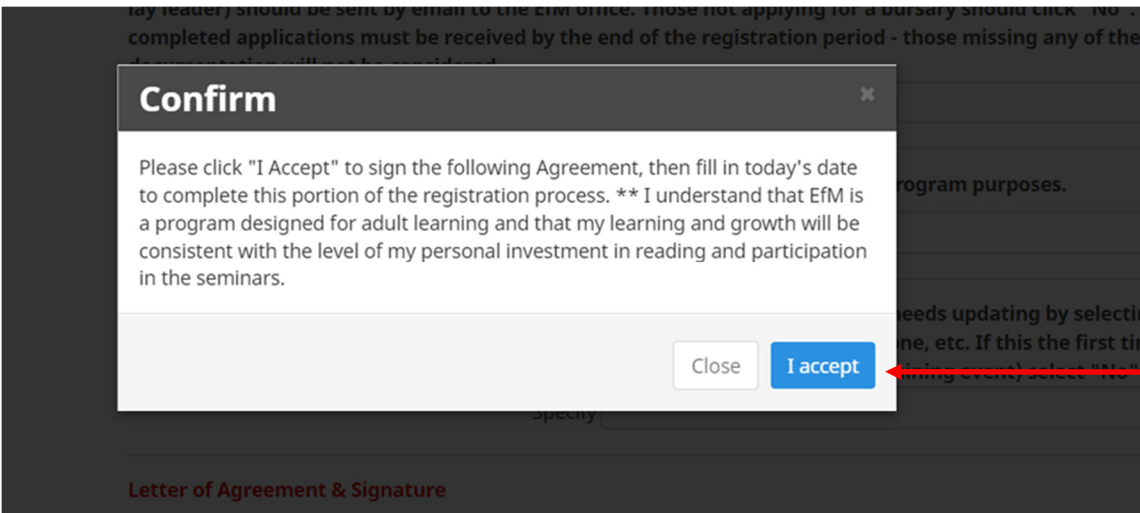
Please use the pop-up calendar to select today's date.

2020-07-13

[Continue my purchase](#)

Validate all sections to continue your purchase.

- Before you proceed, YOU MUST click on the **'Read me'** button – this a way of 'signing' off on your information - it will bring up the following confirmation window



**Confirm**

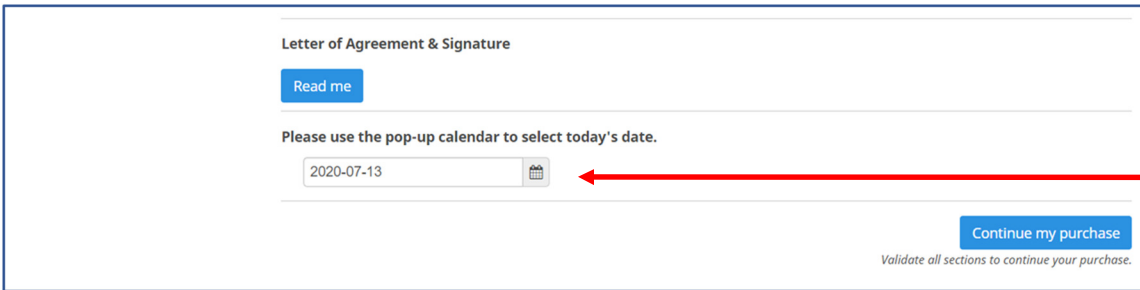
Please click "I Accept" to sign the following Agreement, then fill in today's date to complete this portion of the registration process. \*\* I understand that EfM is a program designed for adult learning and that my learning and growth will be consistent with the level of my personal investment in reading and participation in the seminars.

[Close](#) [I accept](#)

Letter of Agreement & Signature

- Click on the **'I accept'** button
  - this will return you to the **'Personal information'** window and the request to enter today's date as illustrated on the following page


## Select today's date & Continue my purchase



Letter of Agreement & Signature

[Read me](#)

Please use the pop-up calendar to select today's date.

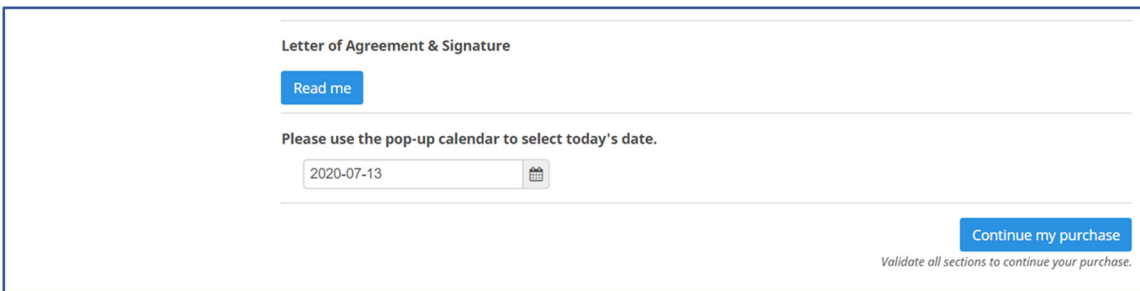
2020-07-13 

[Continue my purchase](#)

Validate all sections to continue your purchase.

A red arrow points from the right towards the date input field.


- Select today's date using the pop-up calendar – *be sure to update any information from a previous registration*



Letter of Agreement & Signature

[Read me](#)

Please use the pop-up calendar to select today's date.

2020-07-13 

[Continue my purchase](#)

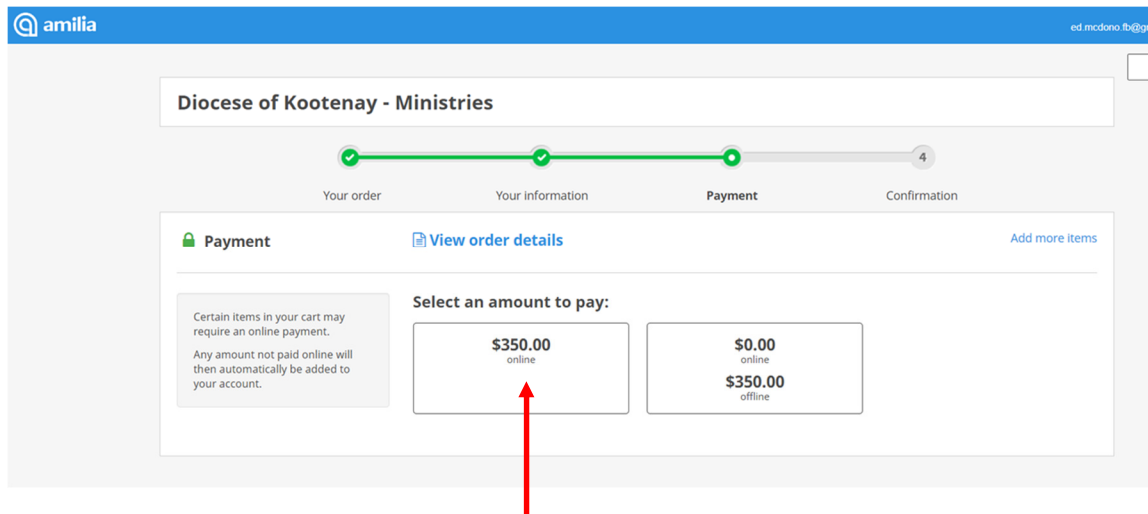
Validate all sections to continue your purchase.

A red arrow points from the right towards the 'Continue my purchase' button.

- Click on the **'Continue my purchase'** button
  - ⇒ This will validate the information that you have provided
  - ⇒ If you have left something out or the information you provided does not check out, you will see an error message in red at the bottom of the screen; you will need to scroll back up through the **'Personal information'** section—the areas that need attention will be highlighted in red
  - ⇒ Once you have corrected any errors or omissions, you will need to click on the **'Read me'** and **'I accept'** buttons a second time, then once again on the **'Continue my purchase'** button
  - ⇒ Once you have no errors in your **'Personal information'** section, you will be taken to the **'Payment'** section

# Payment

- There are standard fees associated with Student registrations, Mentor Training Event registrations and Continuing Education for Graduates registrations
  - ⇒ the **'Payment'** screen below reflects the \$350.00 fee for Student registrations
  - ⇒ the screen for those participating in Mentor Training Events and the Continuing Education for Graduates program is similar but with amounts of \$75.00 for each
  - ⇒ There is no fee associated with Mentor registration; Mentors only pay a fee when they are registering for a Mentor Training Event



- Students, Mentors and participants in the Continuing Education for Graduates program have two choices for payment – online payment and offline payment—these are found on the first **'Payment'** screen as above

## IMPORTANT – CHOOSE CAREFULLY

It is expected that **the majority** of those registering will pay the full registration fee for their program or event at the time of registration and will need to **CLICK ON** the box on the left labelled **'online'** (red arrow)

## Payment - continued

Diocese of Kootenay - Ministries

ed.mcdono.fb@gmail

Your order   Your information   **Payment**   Confirmation

**Payment**   [View order details](#)   [Add more items](#)

Certain items in your cart may require an online payment. Any amount not paid online will then automatically be added to your account.

Select an amount to pay:

\$350.00 online	\$0.00 online \$350.00 offline
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- When you choose online payment (see red arrow on the **'Payment'** screen illustration above) a new screen will appear offering payment options by credit card or bank
- Credit card payments can be made by MasterCard or VISA; bank payments can be made by E-check
- Choose your preferred option (credit card or bank) and fill in the requested information on the following screens (there is a help screen associated with E-check payments if needed)
- You will also have an option to save your credit card information on the Amilia website for future registrations
- All credit card and banking information is secured on the Amilia website and no one associated with Amilia or the Diocese of Kootenay has access to your confidential information

**If you previously selected payment option 2 or 3 and are NOT paying the full registration fee at the time of registration – then you **MUST** click on the box on the right labelled **'offline'****

- The offline option (see green arrow on the **'Payment'** screen illustration above) will allow you to complete your registration while recording an outstanding balance on your account
- You must then contact the EfM Canada office by email - [efmcanada@kootenay.info](mailto:efmcanada@kootenay.info); arrangements will be made to discuss payment options in person via a telephone conversation or Zoom meeting

## Confirmation of Registration

- When you have filled in the **'Payment'** section your registration will be complete and you will be notified that a confirmation email/invoice has been sent by Amilia to the email address used to create your account
- The invoice will be issued by 'Diocese of Kootenay – Ministries' – please make sure to check your Junk Mail and Spam folders if it does not arrive in your Inbox
- For those who selected online payment the Invoice will show that the registration fee has been paid in full; this will serve as both a confirmation of registration and a receipt
- For those who selected offline payment the Invoice will show an outstanding balance; this will serve as a confirmation of registration and notification of a balance due
- **Please Note:** your bank and credit card statements will not indicate that payment was made to 'EfM Canada'; this has caused some confusion and we are working to clarify the billing references for the current registration cycle
- *If you have any question regarding a charge to your account that you are not able to identify please contact the EfM office as soon as possible – we should be able to determine quickly whether or not it is related to your registration*
- Once you have confirmed receipt of the email and Invoice you may logout from your Amilia account
- To logout of your Amilia account you will need to click on your name / email address at the top right of your screen



- A blue **'Logout'** button will appear beneath your name / email address
- Click on the **'Logout'** button and then close your browser window to completely exit the Amilia website