Training for RSS Series Planners & Support Staff

Topics covered in this training:

- Review CME requirements for activities & participants
- How to access the attendance code for an RSS session
- How to provide this code to attendees
- How to manually register participants & mark them as attended
- How to pull attendance reports
- How to edit a session’s details if your activity requires it

Glossary Terms

- **CME -** Accredited Continuing Medical Education. A CME Activity has been approved to meet accreditation requirements. CME Credit is awarded to physicians that participate in a CME activity.
- **Accredited Activity** – An activity that meets CME accreditation requirements and serves to maintain, develop, or increase the knowledge, skills, and professional performance and relationships that a physician uses to provide services for patients, the public, or the profession.
- **RSS Series -** Regularly scheduled series (RSS) is a live accredited activity planned as a series with multiple, ongoing sessions, e.g., offered weekly, monthly, or quarterly.
- **Session** – An individual instance of an RSS activity
- **Series/Activity Faculty** – A blanket term referring to anyone in the position to control the content presented at an accredited activity. This term includes Speakers/Presenters, Moderators, Committee Members, Course Chairs, Planners & Coordinators. Support staff that only send emails/meeting reminders are excluded.
- **Disclosures & CME Forms -** Forms required to help us protect learners from commercial bias and marketing.
- **EthosCE -** The developers of the platform used by our Medical Education Department to manage our CME content.

CME requirements for activities & participants

CME requirements for activities & participants

Activities

- All activity faculties must complete the required Disclosure and CME Forms at the start of each accreditation cycle in July
- Coordinators/Planners must maintain and update the session details as needed & that the required session files are made available
- Invitations to the session must include the required CME Accreditation Statements
- Provide the Attendance Code to participants to enable them to complete the CME requirements

Participants

CME requirements for activities & participants

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Participants

- Attend the activity and mark their attendance
- Complete the CME forms
- Report credits to CE Broker

Questions?

iLearn

Follow Along Training

How to access/view the attendance code for an RSS session

Follow Along…

1. Hover over the Live Activities button on the main menu
2. Select your activity from the drop-down menu
   (*I'll be using the Pediatric Grand Rounds Series as an example*)
3. Click the Full Sessions List Button to scroll to the bottom and select the session you wish to view the code for
4. Then scroll to the bottom of the session details for the code

How to provide the attendance code to attendees

Attendance codes are:

- Used by attendees to mark their attendance
- Unique for each session
- Can be changed ahead of the session (*contact CME dept. to request the change*)

- **DO NOT give codes ahead of the session.** Codes should be given to the audience during the session, not before
- **DO provide assistance for someone who is unable to use the code.** Coordinators can manually mark attendance for anyone who was unable to use the code to register

How to manually mark someone's attendance (& registration)

Follow Along…

Starting from the session page…

1. Click the enrollments tab
2. **If the person is already enrolled**, mark the checkbox next to their name, and click the "Mark user Attended" button
3. **If the person is not enrolled**, click the "Search & Enroll" tab above, then...
   1. Find the person using the search fields
   2. Mark the checkbox next to their name, and click the "Enroll User" button
   3. Go back to step 2 to complete marking them as "Attended"

How to pull attendance reports

Follow Along…

From the session’s Enrollments tab

1. You can first sort to view ONLY those who are marked as attended
2. then click the blue cloud icon at the bottom of the list

This will download a .csv file with all enrollments

You can also go to the Course Reports Tab > Dashboard Tab to view an in-depth report for the session.

Questions?

How to edit a session's details*
(Coordinators/Planners only)

Follow Along…

From the session page, click the Edit tab

- Fill in the information within the templated fields as instructed during your activity onboarding, then save your edits.
  Be careful with your edits as there is a lot of code on the text field!
  The information you edit will vary for each series and will depend on your activity's needs.

- **If you need to revert your changes:**
  1. Click the "Revisions" tab
  2. Then select "Revert" next to the most recent revision available.

Questions?