Ethos RSS Module Coordinator Training

Presentation Overview

- Overview of Continuing Medical Education (CME)
- Roles and Responsibilities in CME Activity Management
- Ethos Process Overview & Demo
- FAQ/Resources

Continuing Medical Education (CME) Overview

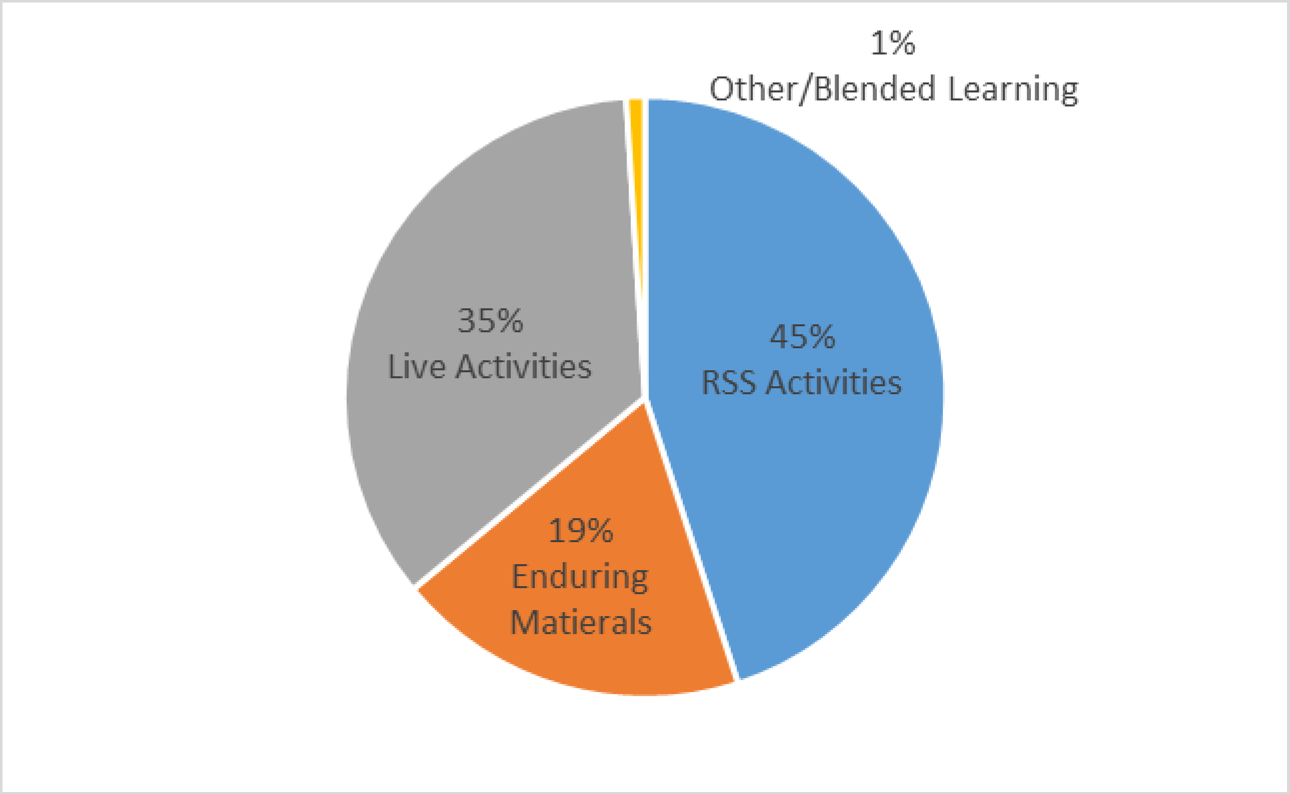
What is CME?

- CME is an essential component of lifelong learning for healthcare professionals
- It supports the maintenance and improvement of clinical knowledge, skills, and professional performance

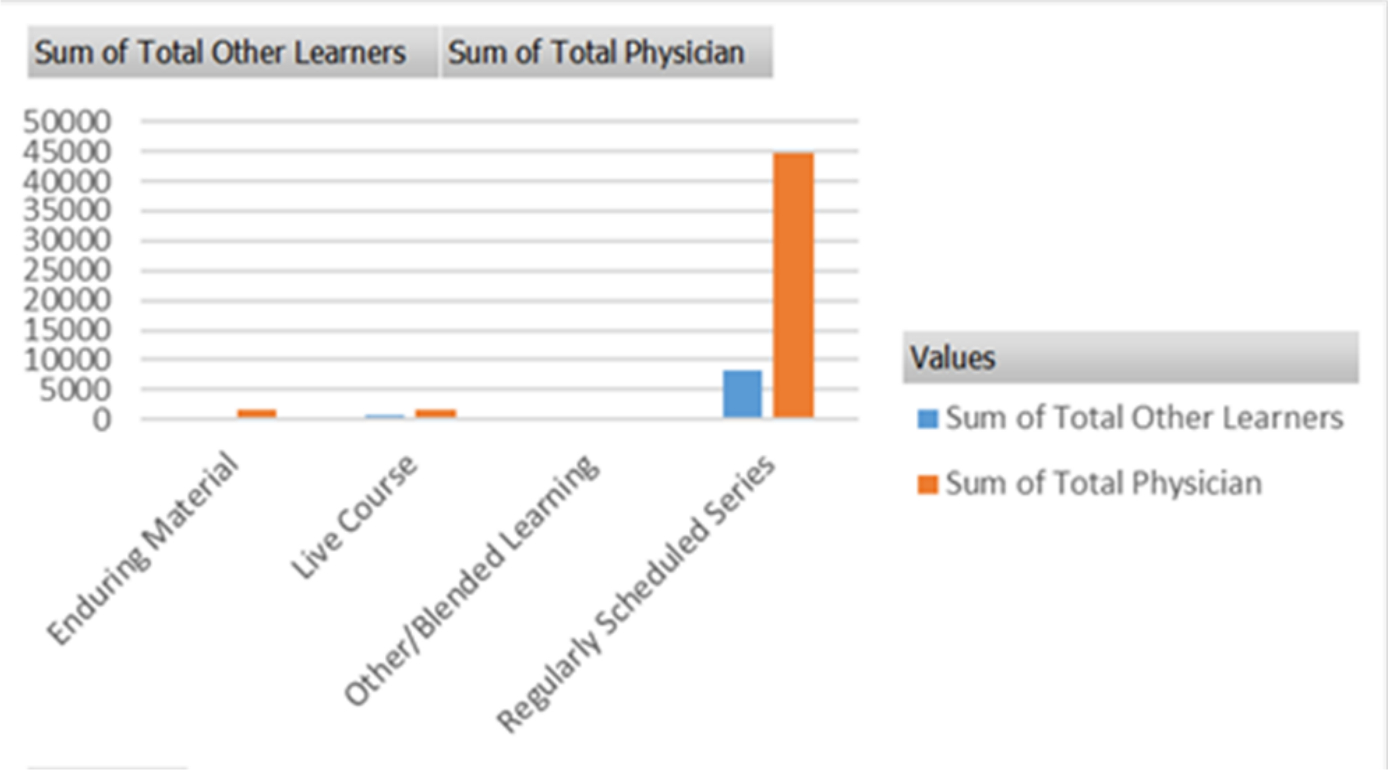
Why is CME Important?

- Ensures high-quality patient care through updated practices.
- Meets licensing and credentialing requirements for healthcare providers.
- Enhances professional development and career growth.

CME at UT Southwestern



Total Learners By CME Activity Type
UT Southwestern Medical Center (2022)



**Physician, Other Learners: # Learning Encounters

The largest number of CME learners are those who attend RSS activities!

CME Accreditation Requirements

- **Faculty Disclosure Requirements**
  - All speakers/authors must disclose relevant financial relationships with ineligible companies.
  - Disclosures must be submitted and reviewed prior to the activity.
  - Transparency ensures compliance with ACCME Standards for Integrity and Independence.
- **Mitigation of Relevant Financial Relationships**
  - Identifying and addressing conflicts of interest through mitigation strategies.
  - Includes steps like peer review, altered presentation content, or exclusion of biased individuals.

ACCME Guidelines on the Mitigation of Financial Relationships

IDENTIFY

Mechanism: Disclosure forms in Ethos

Who: Speakers, Course director, Planning committee

When: Prior-to delivery of content

MITIGATE

Mechanism: Notice to CME Prog. Coord at least 1-week prior-to event

Who: Anyone with conflicts

When: Prior-to delivery of content

DISCLOSE

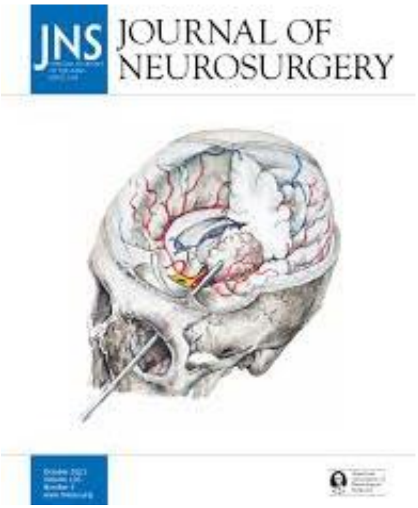
Mechanism: Disclosure to Learner (DTL) handout, Announcement

Who: Distributed to learners

When: Prior-to delivery of content

All occurs ***PRIOR*** to the delivery of accredited content!

Journal Club Requirements



Goals of Journal Club

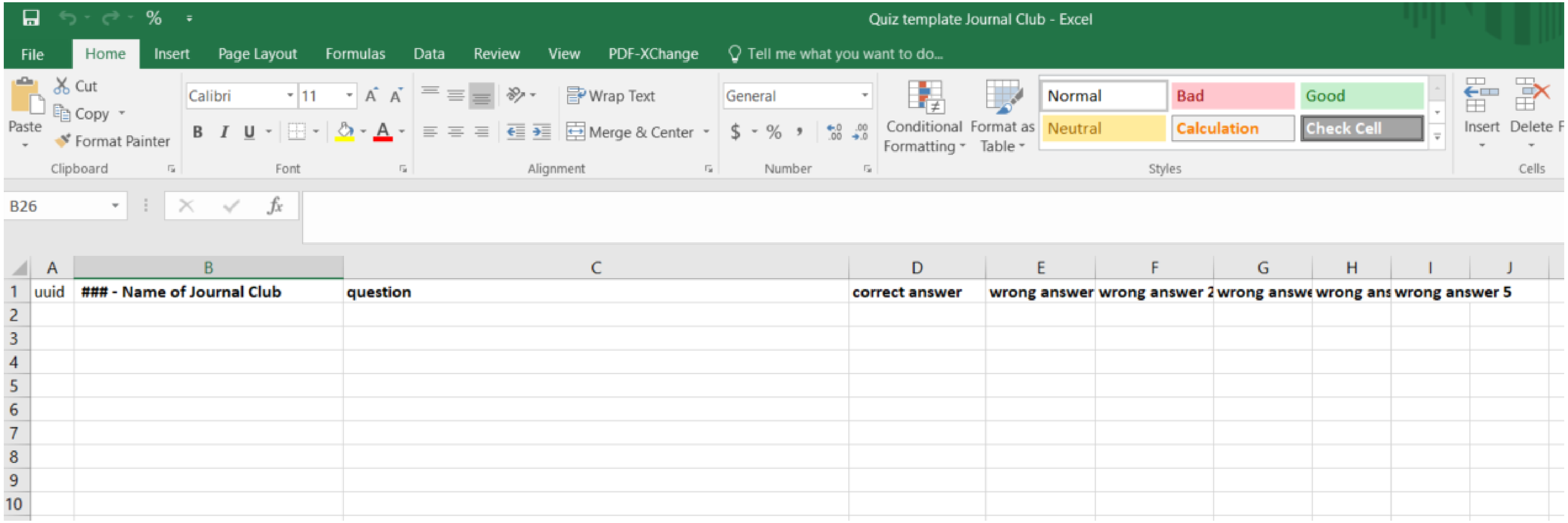
1. Learn about best evidence to inform clinical decisions

2. Learn about important new evidence that should change practice

Process for Journal Club RSS Activities

DEADLINE	TASK	PERSON
2 weeks prior to session	Create session page in Ethos	RSS Coordinator
	* Follow prescribed RSS process for CME certification	
1 week prior to session	Upload the following to Ethos session page:	RSS Coordinator
	* Copy of journal article(s) being discussed	
	Email to your assigned CME Program Coordinator:	
	* Quiz questions with correct answer provided (Use Quiz Template)	
1 week to 3 business days prior to session	Builds quiz in Ethos session page	CME Coordinator
	Creates reminder email in Ethos session page	
Day of Session	Sign in at Journal Club session using Event ID	Learner/Attendee
	Receives auto-generated email with instructions for completing quiz	
Day of session to 1 week after session	Completes quiz and then CME/Attendance credits awarded	Learner/Attendee

Journal Club - Quiz Template



Journal Club – Quiz Sample

210 Liver Transplant Journal Club (052324)

Quiz

← RETURN TO COURSE HOME

View | Edit | My results | Quiz | Take

Course progress

- Attendance
- Quiz
  - REQUIRED
  - Review
- Credit
- Complete

You have already passed this Quiz.

Quiz

Page 1 of 4

Question 1

In the phase-2 randomized double-blind controlled clinical trial by Simon et al which looked at the benefit of aspirin vs placebo, aspirin was found to be superior to placebo in reduction of all the following items except for which of the following:

Choose one

- a) Absolute change in hepatic fat % by magnetic resonance spectroscopy
- b) Liver Stiffness by VCTE
- c) AST/ALT
- d) Weight loss ≥ 3%

Leave blank | Next

Journal Club – Email Notification to Learners

Dear Colleague,

Thank you for your recent attendance at 210 Liver Transplant Journal Club (052324).

To complete the Journal Club requirements, please sign in and proceed to the following link to complete the Journal Club Quiz:
https://cme.utsouthwestern.edu/rss-210-2024/node/131396

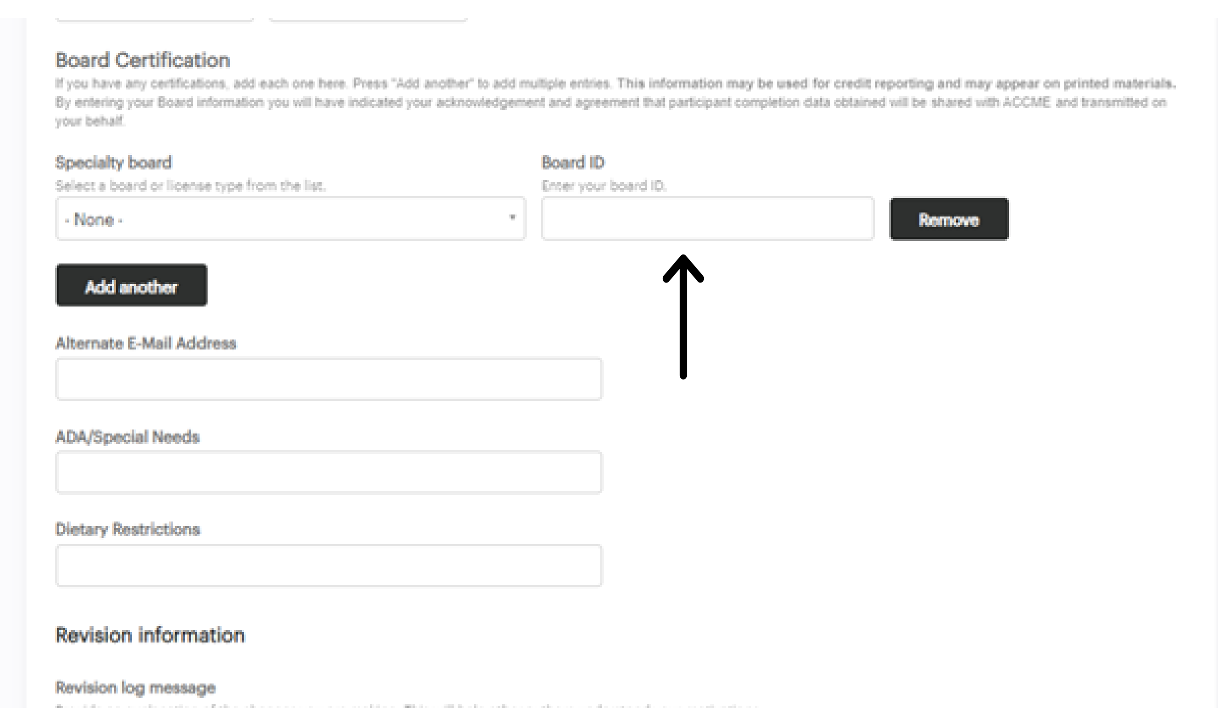
The quiz will be available for 7 days following the session.

For reference, here are links to the Liver Transplant Journal Club articles discussed at this session:
A Phase 3 Trial of Seladelpar in Primary Biliary Cholangitis
A Phase 3, Randomized, Controlled Trial of Resmetirom in NASH with Liver Fibrosis
Aspirin for Metabolic Dysfunction–Associated Steatotic Liver Disease Without Cirrhosis - A Randomized Clinical Trial

Thank you for your participation,
University of Texas Southwestern Medical Center
Office of Continuing Education

MOC/CC Reporting Process Update

Board ID in Ethos Profile (MOC/CC)


Board Certification

If you have any certifications, add each one here. Press "Add another" to add multiple entries. This information may be used for credit reporting and may appear on printed materials. By entering your Board information you will have indicated your acknowledgement and agreement that participant completion data obtained will be shared with ACCME and transmitted on your behalf.

Specialty board

Select a board or license type from the list.

- None -

Board ID

Enter your board ID.

Remove

Add another

Alternate E-Mail Address

ADA/Special Needs

Dietary Restrictions

Revision information

Revision log message

- CE Office Reporting to Boards on behalf of the learner
- Learners can expect 60-75-day delay between the activity date & reflection in learner's board profile.
- Post-Test/Evaluation sent to learner (when applicable)
- NEW! Board ID and DOB to be added to ethos profile for reporting (prev. MOC form)

Email your CE Coordinator

- Ethics, other specialty credit requests
- MOC Quiz/Credit
- Financial relationship notification!

Roles and Responsibilities in CME Activity Management

Task/ Responsibility	CME Coordinator	RSS Coordinator
Compliance Management	Ensure information provided in ethos RSS module adheres to accreditation standards.	Inputs/provides activity information into ethos RSS module
Mitigation of Financial Relationships	Initiates peer review when financial relationships are disclosed.	Adds faculty to each session, tracks faculty disclosures, notifies CME coordinator of any financial relationships
Document Sharing	Provides templates (RSS Coordinator Resource Page)	Shares approved documents with learners prior to the session.
SMS Code Distribution	Generates SMS code after approving session in ethos	Collects code and shares with learners during activity.
Credit Reporting	Verifies attendances and reports credit on behalf of learner	Ensures that learners sign in during session timeframe to receive credit

Process Overview

2 Weeks Prior to Session	Add Faculty, Track Disclosure Form Completion
1 Week Prior to Session	Review Disclosures, Notify CE Coordinator of any listed financial relationships
3 Business Days Prior	Upload documents to edit/attachments tab in ethos. Complete all other steps for ethos *Set Session to "Needs Review"*
2 Business Days Prior	CE Coordinator Reviews/Approves Session

Ethos Workflow Summary

If changes are needed, workflow reset to needs review

New
- RSS Coordinator collecting disclosures, editing session, uploading documents

Needs Review
- Ready for CE Coordinator to review
- All documentation uploaded; Faculty Disclosures complete
- Notification of financial relationships to CE Coordinator (if applicable)

In Review
- CE Coordinator reviewing session
- Received automated email with indication

Feedback
- CE Coordinator has identified something is missing
- Automated email sent with feedback message included

Approved
- Session approved, Event ID avaliable

No changes needed; skips feedback

***Set session to "Needs Review" no more than 30 day prior to the session dat**

Demo Overview

1	Series link provided (Bookmark!)	•Annually •Upon training completion
2	Create link for individual session	•As soon as sessions are confirmed •Minimum: 2 weeks prior-to session
3	Edit session information	•Refer to instructions
4	Add faculty, track disclosure form completion	•As soon as session information is confirmed •Minimum: 2 weeks prior-to session
5	Review disclosure forms and notify CE office of listed financial relationships	•Continuously until completed •Notify CE office of financial relationships minimum 1 week prior-to session
6	Upload documentation to Attachments tab	•All session information is ready •Minimum 3 days prior-to session
7	Set workflow to Needs Review	•All session information is ready •Minimum 3 days prior-to session
8	Session feedback or approval	•CE office •System notifications
9	Collect Event ID	•CE office upon approval •2 days prior-to session
10	Provide session documentation, Event ID to learners	•Day of activity

1 Series link provided (Bookmark!)

- Annually
- Upon training completion

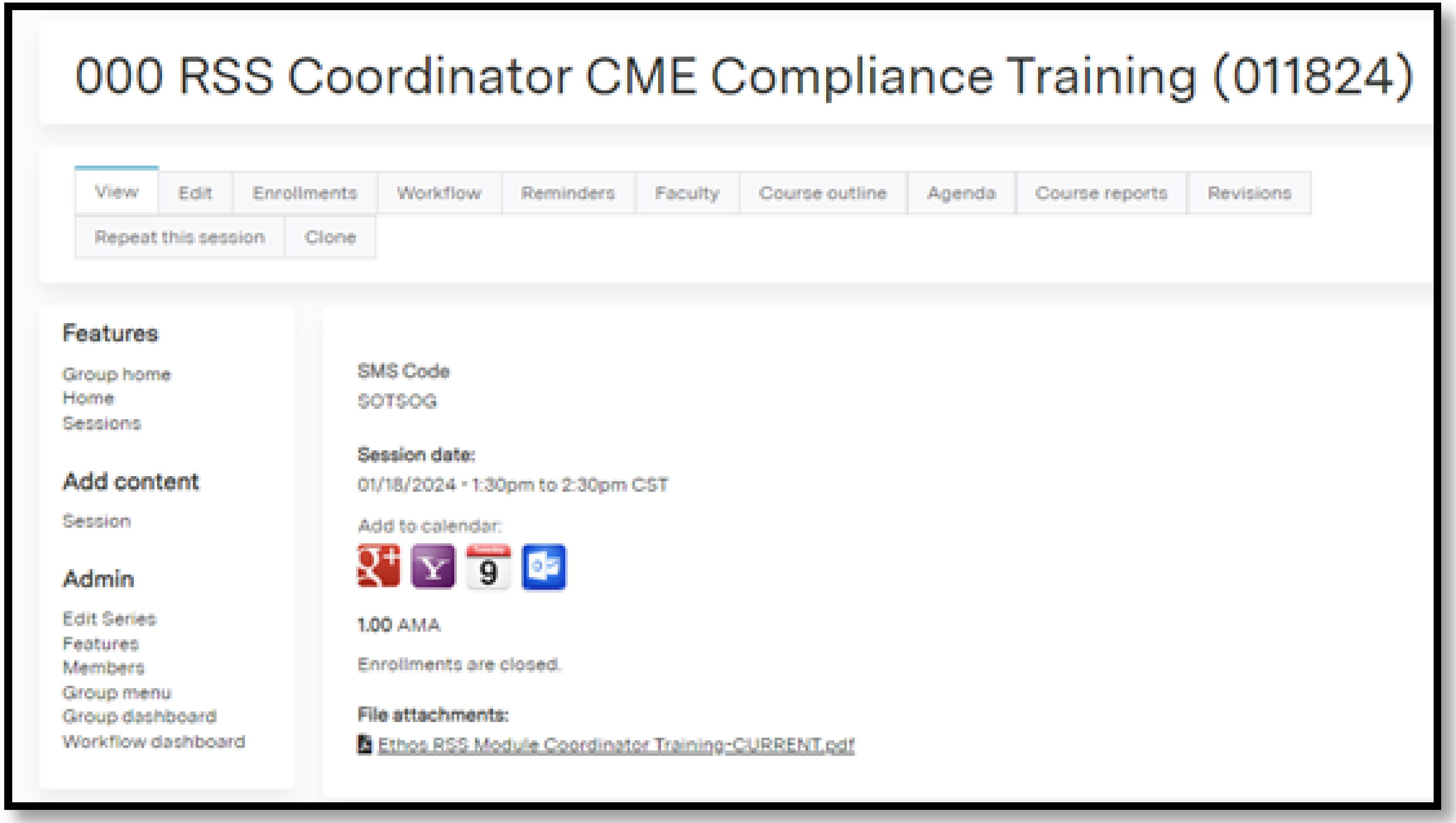
Series Homepage

- Homepage for all sessions within RSS Series
- This is where you will add your individual sessions

1 Series link provided (Bookmark!)

- Annually
- Upon training completion

Session Homepage Overview

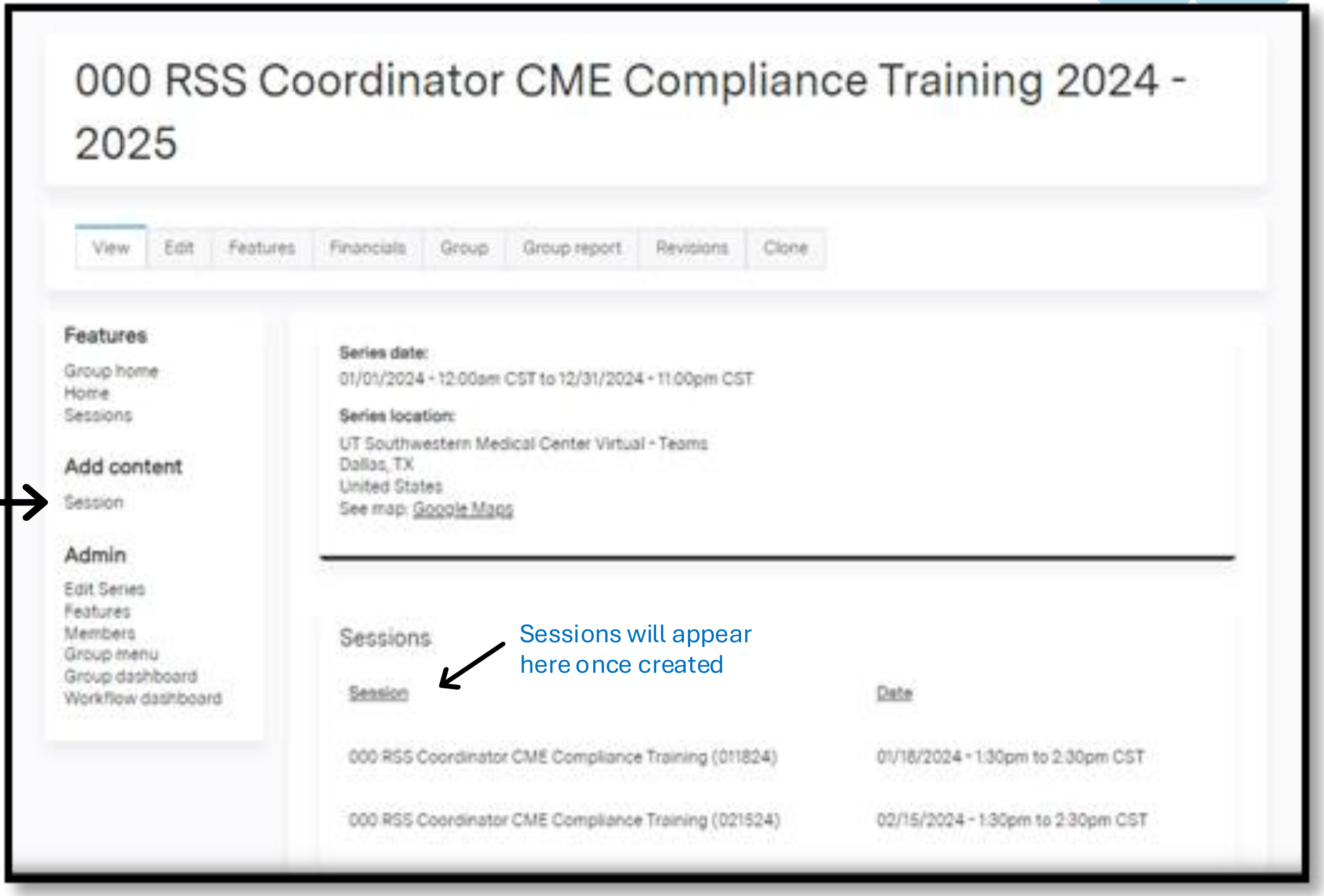


2

Create link for individual session

- As soon as sessions are confirmed
- Minimum: 2 weeks prior-to session

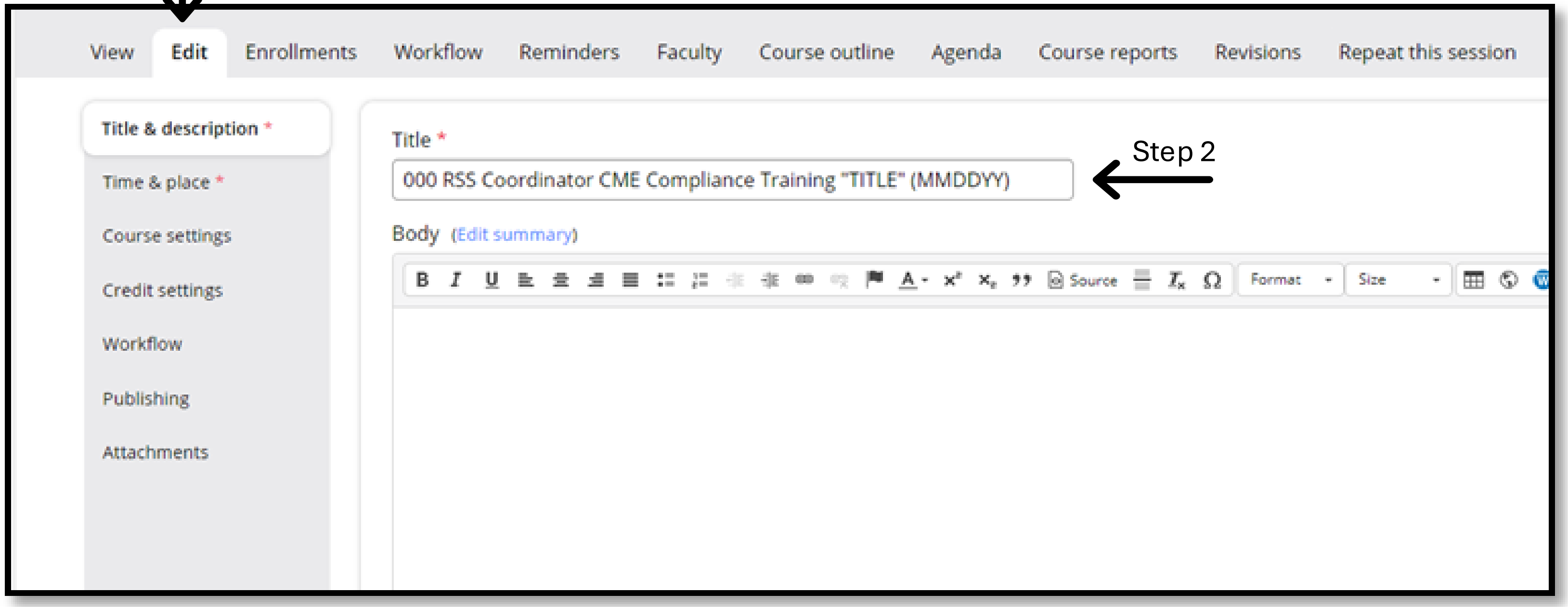
Click "Session" to add new session on Series home page



3a Edit session information

- Refer to instructions

Step 1



Step 1: Select "Edit" Tab

Step 2: Insert Session Title

RSS Series Title "SESSION TITLE" (MMDDYY)

Example: 123 Internal Medicine Grand Rounds "Equity Teaching Rounds" (041423)

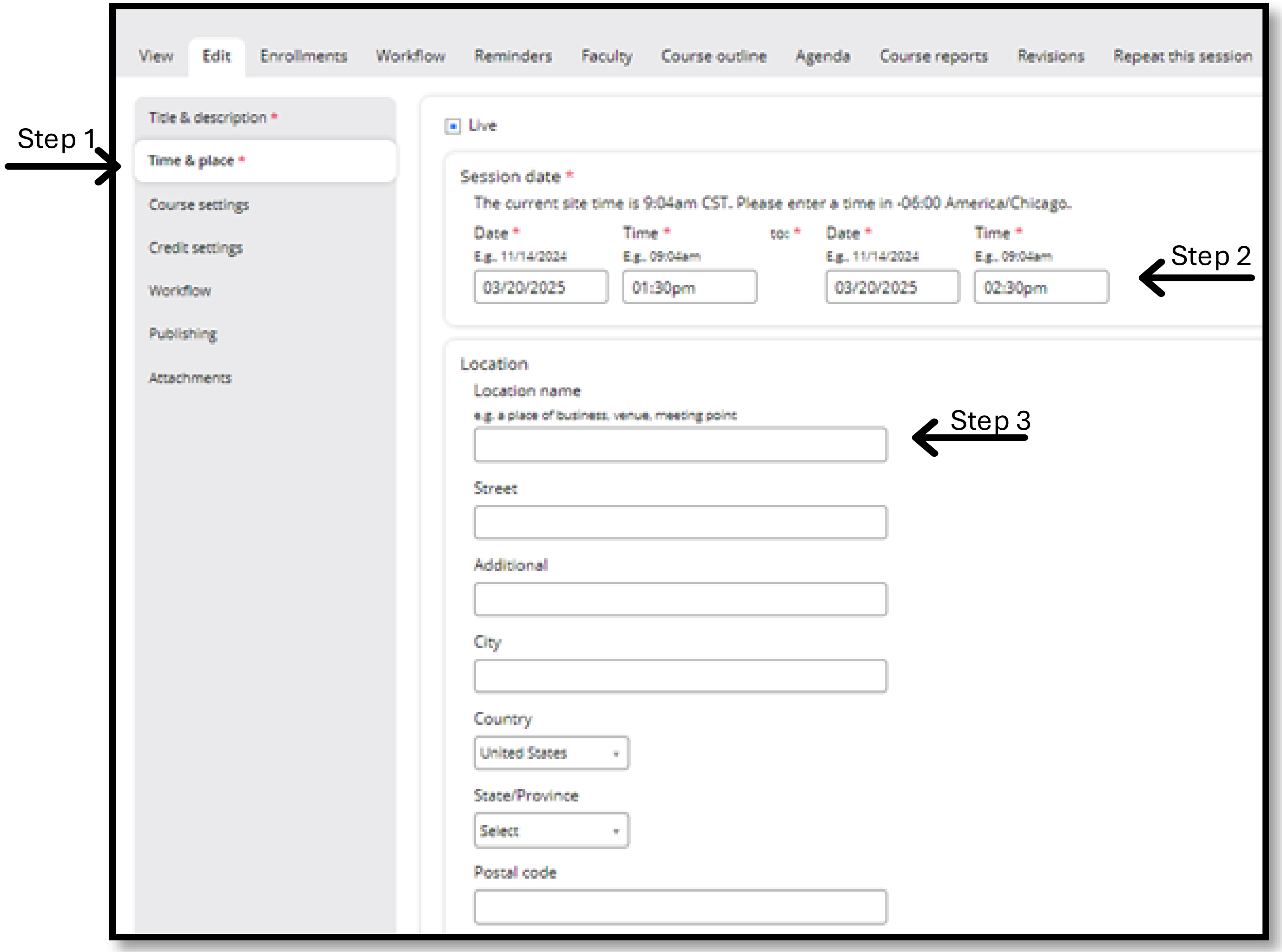
3b Edit session information

- Refer to instructions

Step 1: "Time & Place"

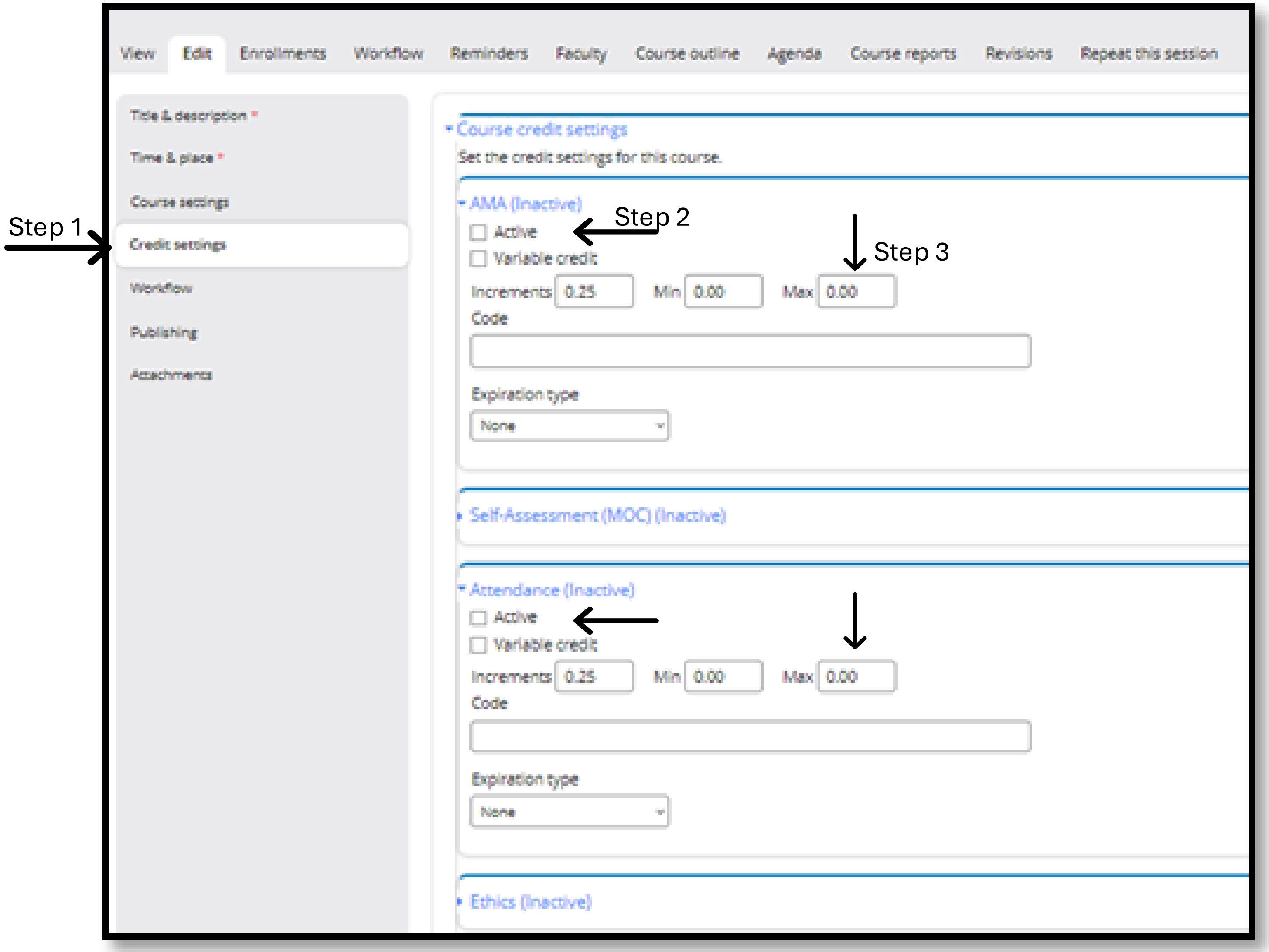
Step 2: Check Date & Time

Step 3: Insert info about location



3c Edit session information

- Refer to instructions



Step 1: Click Credit Settings

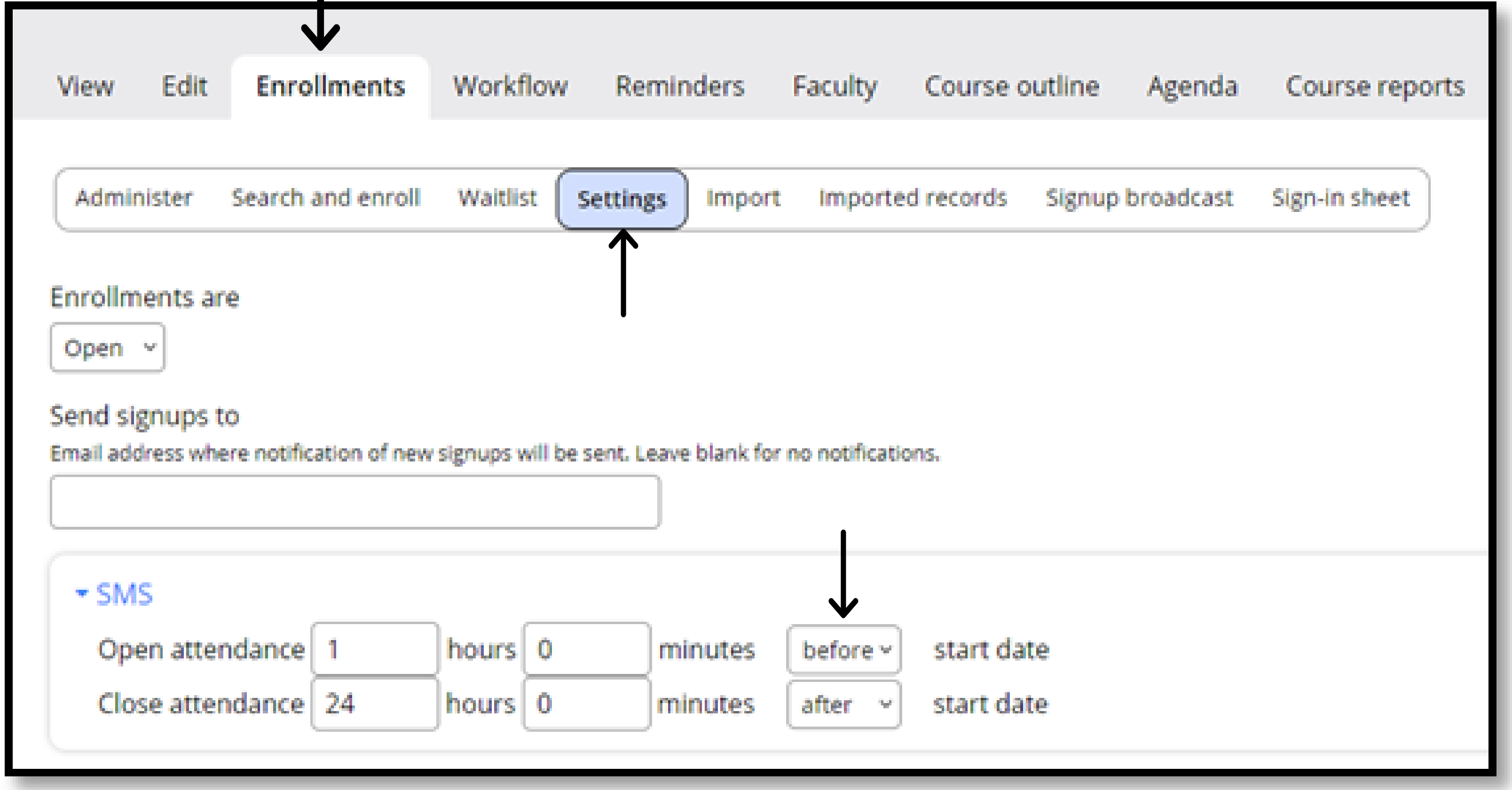
Step 2: Expand AMA & Attendance Sections, ensure BOTH are marked "ACTIVE"

Step 3: Input the # of Credits for the Session in the Max Section

Step 4: Select "SAVE"

3d Edit session information

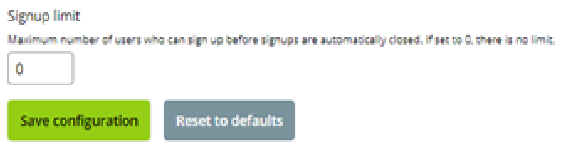
- Refer to instructions



Step 1: Select "Enrollments" Tab and then select 'Settings"

Step 2: Ensure settings reflect 1 hour <u>before</u> and 24 hours <u>after</u>

STEP 3: Scroll down and click SAVE.



4 Add faculty, track disclosure form completion

- As soon as session information is confirmed
- Minimum: 2 weeks prior-to session

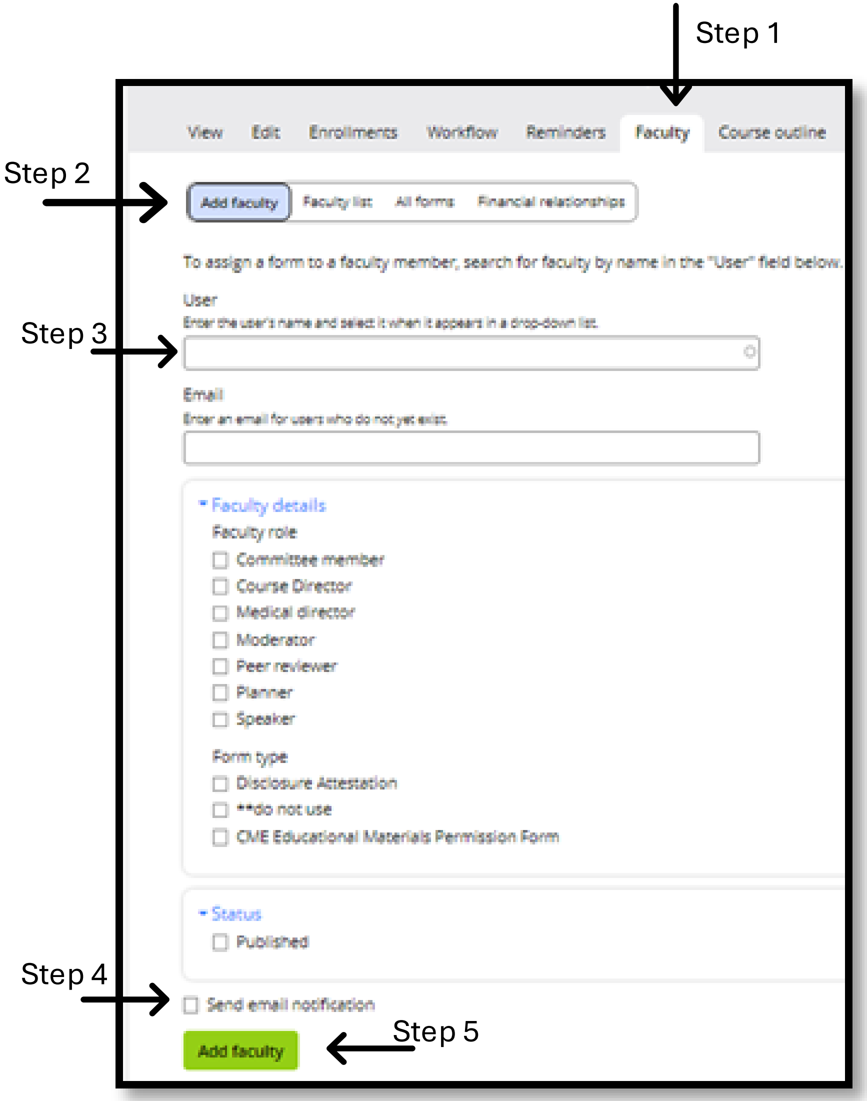
Step 1: Select "Faculty" Tab

Step 2: Select Add Faculty

Step 3: Type Faculty Name/Email address in the user/email box, Select Faculty Role & Form Type (see next slide for form type)

Step 4: Select Send Email Notification (to have automated email sent to faculty to inform them to complete their disclosure)

Step 5: Select Add Faculty
(Repeat for All Faculty)



Which form should I use?

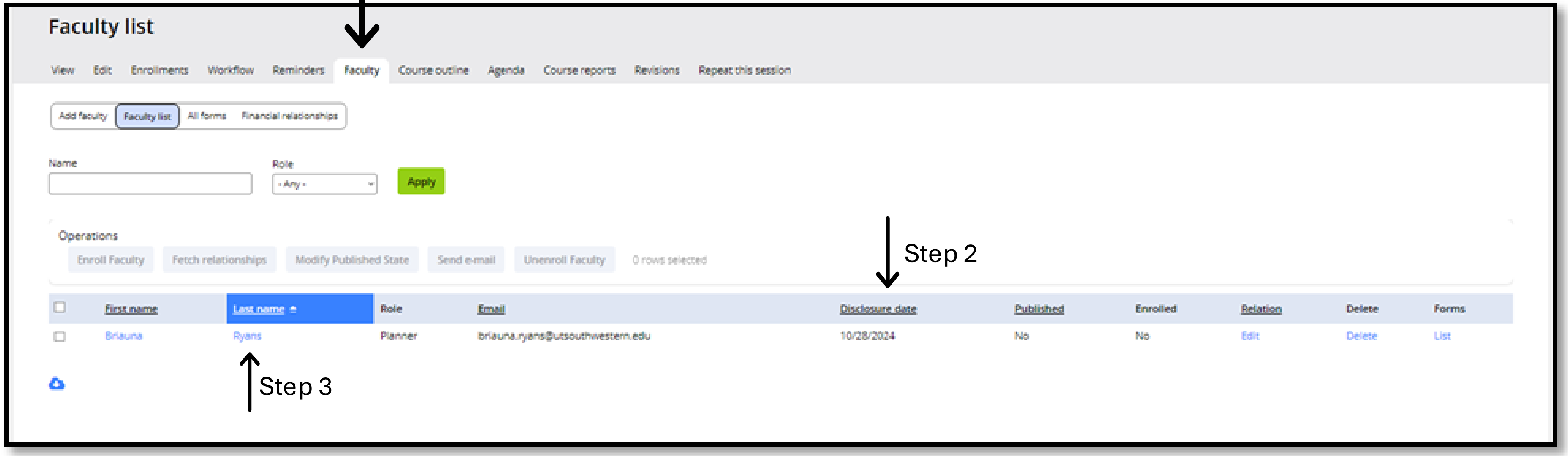
Form	Course director, Planning committee member	Speaker (UTSW)	Speaker (External)
Disclosure Attestation	Yes, if you want Ethos to send a system-generated email to complete their disclosure form (No form = no email)	Yes, if you want Ethos to send a system-generated email to complete their disclosure form (No form = no email)	Yes, if you want Ethos to send a system-generated email to complete their disclosure form (No form = no email)
CME Educational Materials Permission Form	No	Yes, if the session is being recorded, livestreamed to public, or posted online	No
UTSW Speaker Authorization Form	No	No	Yes, if the session is being recorded, livestreamed to public, or posted online

5

Review disclosure forms and notify CE office of listed financial relationships

- Continuously until completed
- Notify CE office of financial relationships minimum 1 week prior-to session

Step 1



If Disclosure date is blank = no disclosure on file

If First/Last Name is Blank = no ethos account

Step 1: Select "Faculty" Tab

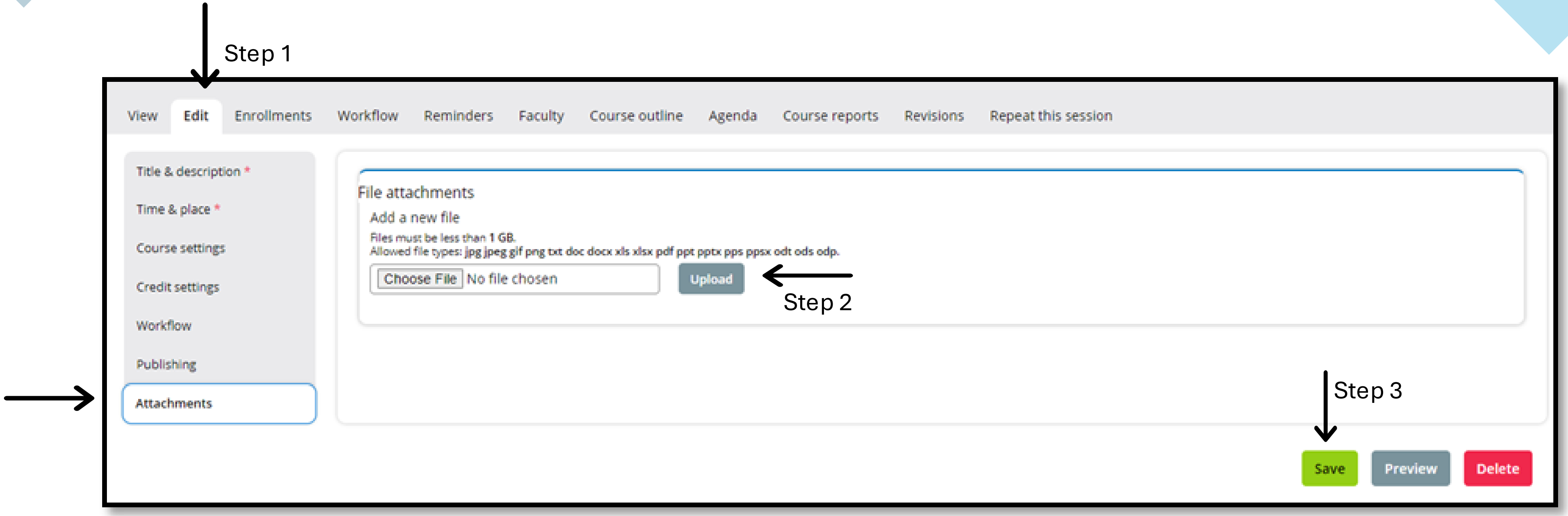
Step 2: Ensure all faculty listed have disclosure date that is within 1 year of the session date.

Step 3: Click the Last name of faculty and select "Disclosure" to view their disclosure. (repeat for all faculty)

*If financial relationship is reported, notify your CE Coordinator **Immediately!**

6 Upload documentation to Attachments tab

- All session information is ready
- Minimum 3 days prior-to session



Step 1: Select "edit" tab and then select "attachments sub tab

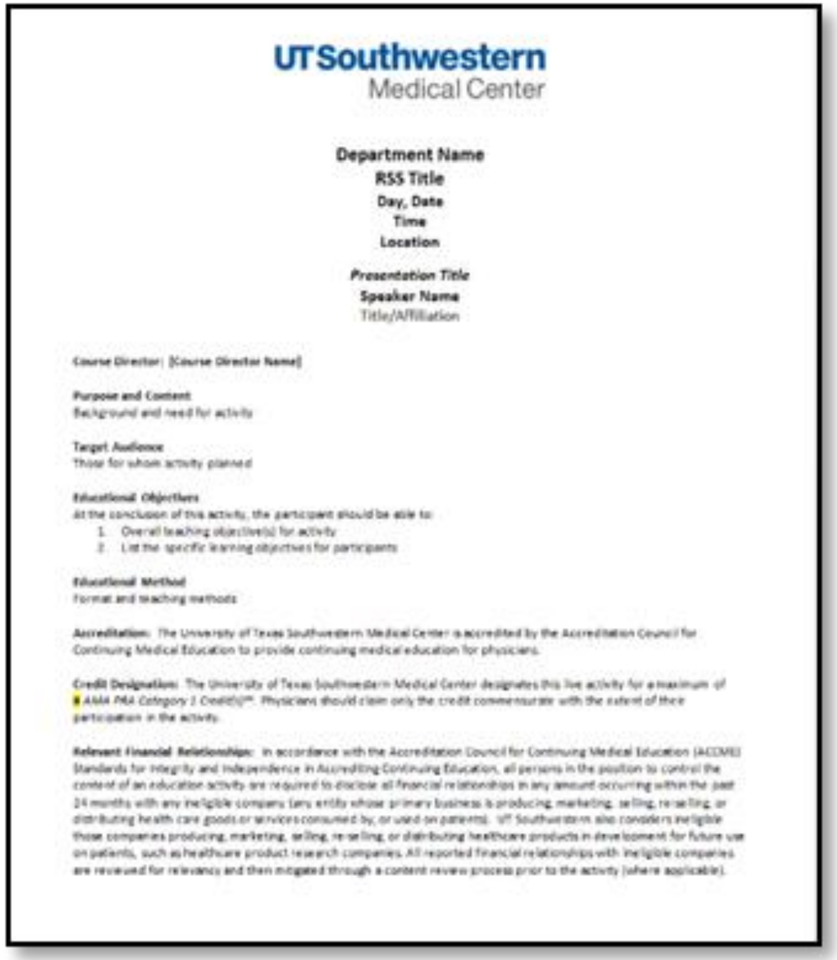
Step 2: Select Choose file and upload both Announcement and Disclosure to Learner (DTL) documents

- naming convention for documents ###_MMDDYY_DTL / ###_MMDDYY_Announcement

Example: 123_041223_Announcement

Step 3: Select SAVE

Templated Documents



UTSouthwestern
Medical Center

Department Name
RSS Title
Day, Date
Time
Location

Presentation Title
Speaker Name
Title/Affiliation

Course Director: [Course Director Name]

Purpose and Content
Background and need for activity

Target Audience
Those for whom activity planned

Educational Objectives
At the conclusion of this activity, the participant should be able to:
1. Overall teaching objective(s) for activity
2. List the specific learning objectives for participants

Educational Method
Format and teaching methods

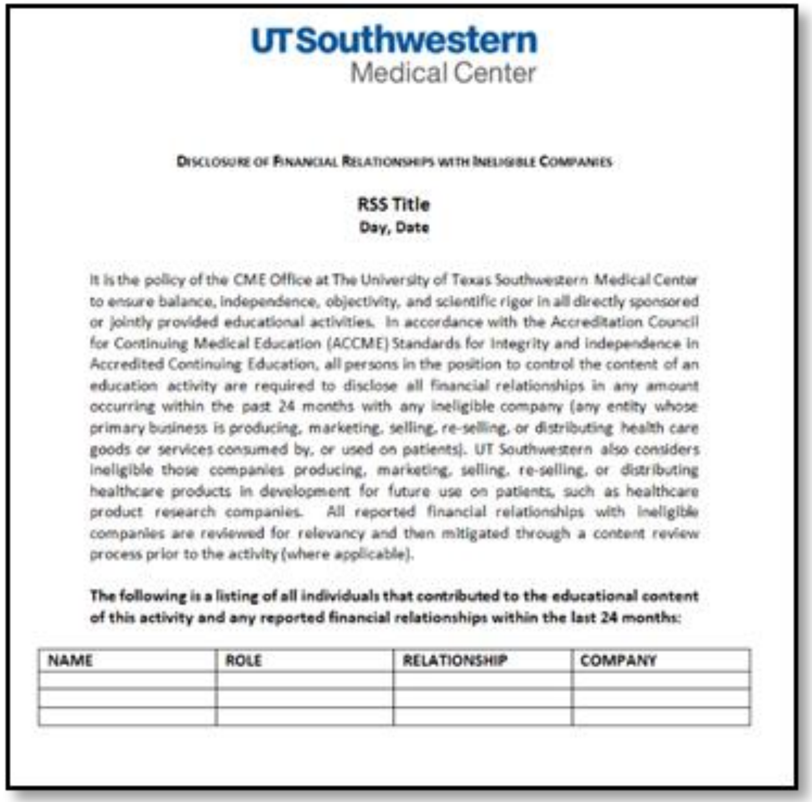
Accreditation: The University of Texas Southwestern Medical Center is accredited by the Accreditation Council for Continuing Medical Education to provide continuing medical education for physicians.

Credit Designation: The University of Texas Southwestern Medical Center designates this live activity for a maximum of X *AMA PRA Category 1 Credit(s)*™. Physicians should claim only the credit commensurate with the extent of their participation in the activity.

Relevant Financial Relationships: In accordance with the Accreditation Council for Continuing Medical Education (ACCME) Standards for Integrity and Independence in Accrediting Continuing Education, all persons in the position to control the content of an education activity are required to disclose all financial relationships in any amount occurring within the past 24 months with any ineligible company (any entity whose primary business is producing, marketing, selling, re-selling, or distributing health care goods or services consumed by, or used on patients). UT Southwestern also considers ineligible those companies producing, marketing, selling, re-selling, or distributing healthcare products in development for future use on patients, such as healthcare product research companies. All reported financial relationships with ineligible companies are reviewed for relevancy and then mitigated through a content review process prior to the activity (where applicable).

Templates available on Ethos RSS Coordinator Resource Page

- Share Announcement & DTL with learners **prior** to the session



UTSouthwestern
Medical Center

DISCLOSURE OF FINANCIAL RELATIONSHIPS WITH INELIGIBLE COMPANIES

RSS Title
Day, Date

It is the policy of the CME Office at The University of Texas Southwestern Medical Center to ensure balance, independence, objectivity, and scientific rigor in all directly sponsored or jointly provided educational activities. In accordance with the Accreditation Council for Continuing Medical Education (ACCME) Standards for Integrity and Independence in Accredited Continuing Education, all persons in the position to control the content of an education activity are required to disclose all financial relationships in any amount occurring within the past 24 months with any ineligible company (any entity whose primary business is producing, marketing, selling, re-selling, or distributing health care goods or services consumed by, or used on patients). UT Southwestern also considers ineligible those companies producing, marketing, selling, re-selling, or distributing healthcare products in development for future use on patients, such as healthcare product research companies. All reported financial relationships with ineligible companies are reviewed for relevancy and then mitigated through a content review process prior to the activity (where applicable).

The following is a listing of all individuals that contributed to the educational content of this activity and any reported financial relationships within the last 24 months:

NAME	ROLE	RELATIONSHIP	COMPANY

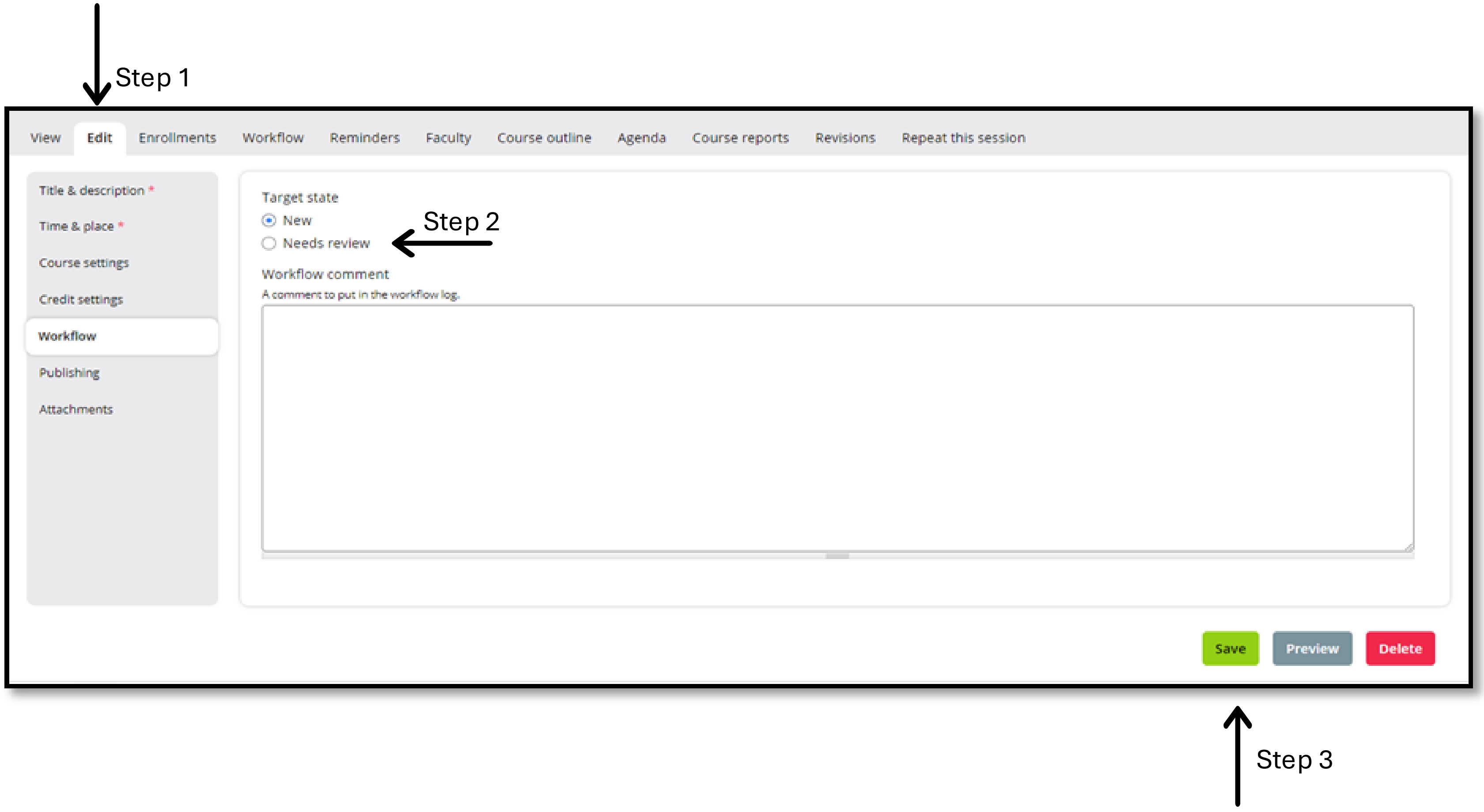
7 Set workflow to Needs Review

- All session information is ready
- Minimum 3 days prior-to session

Step 1: Select "Edit" Tab and then "Workflow" subtab

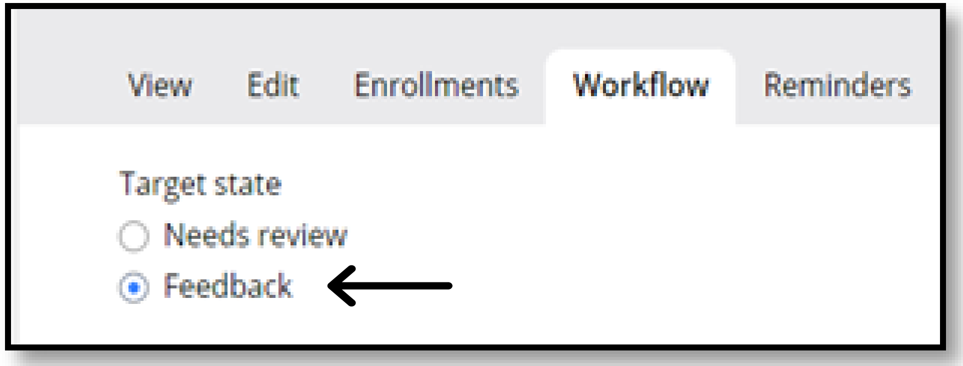
Step 2: Change Target State to "Needs Review"
*Change Target State at least <u>3 business days prior</u> to session date.

Step 3: Select "SAVE"



8 Session feedback or approval

- CE office
- System notifications



If additional information is needed, CE Coordinator will change the target state to "Feedback"

This will initiate a system automated email to the RSS Coordinator with the session link for review.

Comments from your CE Coordinator can be found in the "Workflow" tab

Old State	New State	By	Comment
In review	Feedback	Briauna Ryans	Feedback will appear here
Needs review	In review	Briauna Ryans	
New	Needs review	Briauna Ryans	
(creation)	New	Briauna Ryans	

9

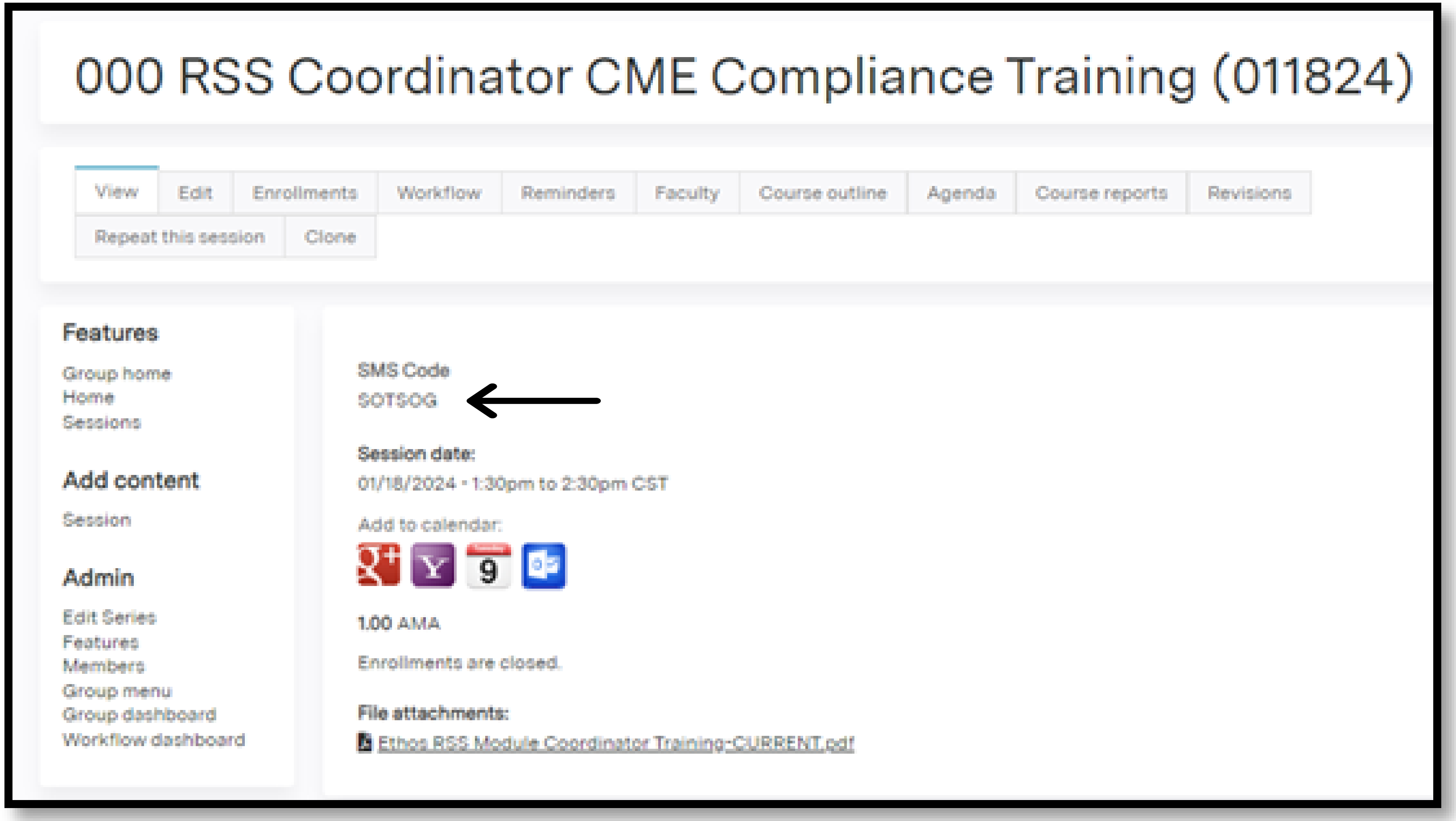
Collect Event ID

- CE office upon approval
- 2 days prior-to session

Step 1: Click link in system email after "approval received"

Step 2: Collect Event ID/SMS Code

Step 3: Share Code with learners on day of session



10 Provide session documentation, Event ID to learners

- Day of activity

- Retrieve Event ID (after session is approved) from session homepage
- Template slide (shown below) available on RSS Coordinator Resource Page

Sign-in to receive CME credit

TEXT <Event ID> to 972-573-8343

or log in and enter at cme.utsouthwestern.edu/code
to receive CME or attendance credit for this session.

The Event ID is available ***today only***.
You will receive a message confirming your attendance

UT Southwestern Medical Center

RSS Process Reminder

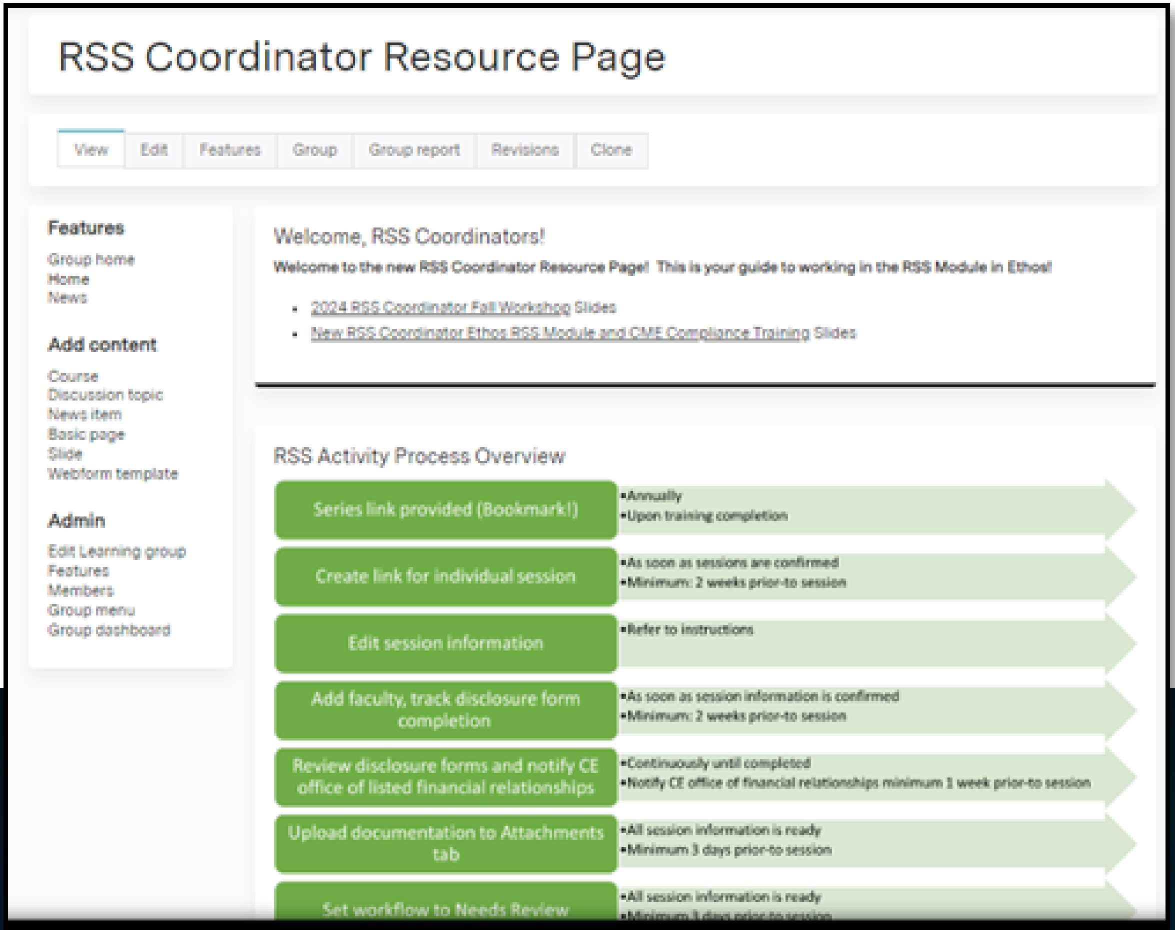
ALL Materials DUE	Day of Session
Wednesday Before	Monday
Thursday Before	Tuesday
Friday Before	Wednesday
Monday	Thursday
Tuesday	Friday

- Be sure to mark activity as 'Needs Review' at least 3 business days in advance
- CME Review 2 Business days prior to session date
- Please send your coordinator an email if you do not have session approval 1 day prior to session.

FAQ

Issue	Solution
What happens if a session gets canceled?	• Update title to include "canceled" at the end • If session is "In Review" or "Approved" • Notify CE Prog Coord
I didn't do any of the steps and the session is tomorrow. Can I still get an Event ID?	• Please follow timeline outlined! • All steps need to be completed before an Event ID can be issued
Can a secondary coordinator be trained?	• Only if working in faculty list consistently • Backup/alternate coordinators must complete the training before we can grant them Administrative rights in Ethos to work in the 'workflow' • System notifications get sent to the originator of the session
I will be out-of-office	• Work with CE Prog Coord ahead of leave
Attendees are receiving "error" message when using SMS Code	• Sign in with the event ID on your phone • Check "enrollments" tab on session page in ethos, select settings and ensure it reflects 1 hour before and 24 hours after.

Can I get a copy of the slides?



https://cme.utsouthwestern.edu/rss-coordinator

Thank you!

Thank you for all your hard work! Please feel free to reach out to your CE Coordinator for any questions or concerns