Ethos RSS Module Coordinator Training

What changes?

Improve efficiency in managing RSS activities

All steps completed in cme.utsouthwestern.edu (Ethos) series pages

Everything for your activity in one place!

Flexibility on when you create session pages

Workflow system/email notifications

Upload documents to session page instead of SharePoint
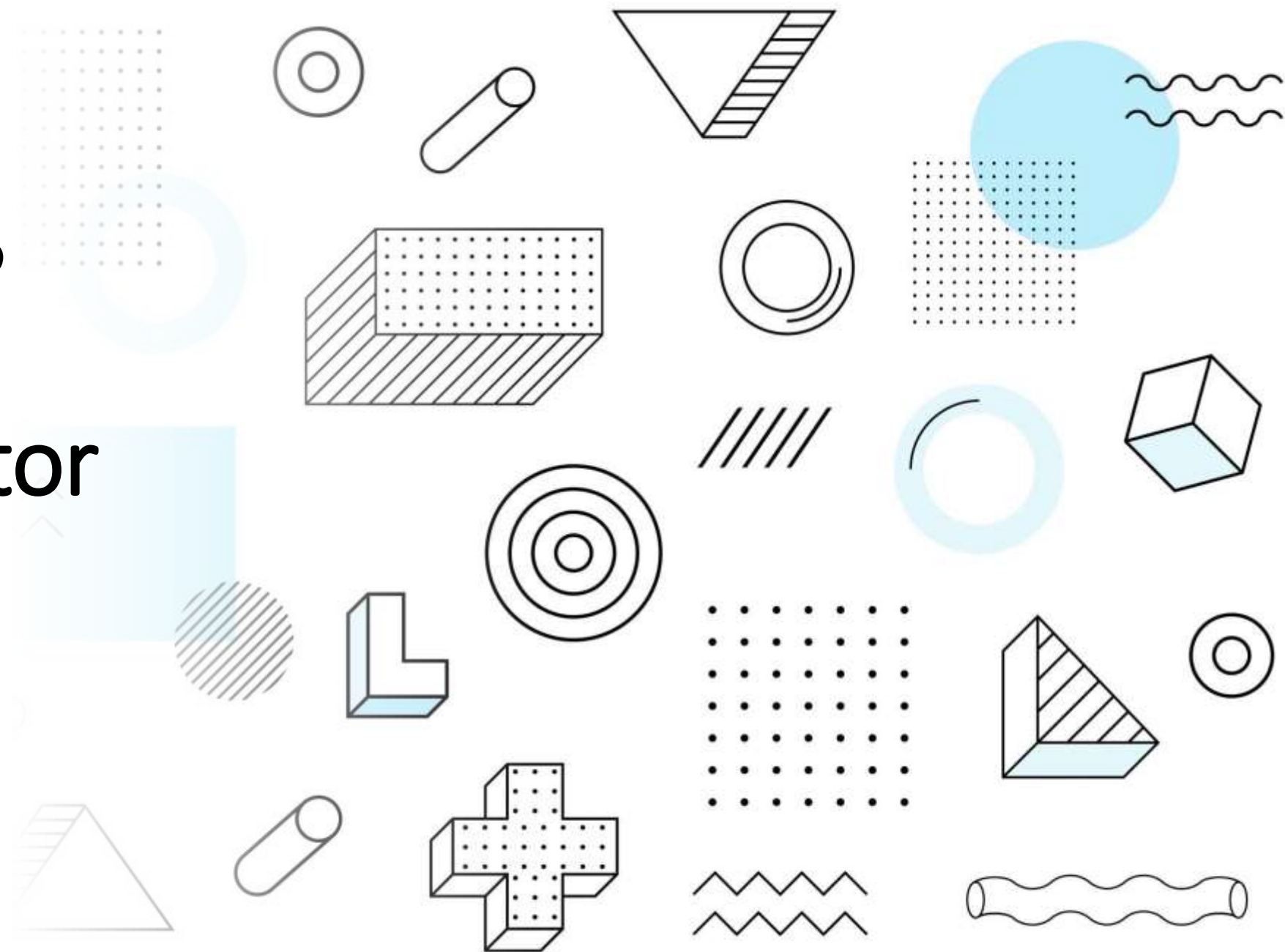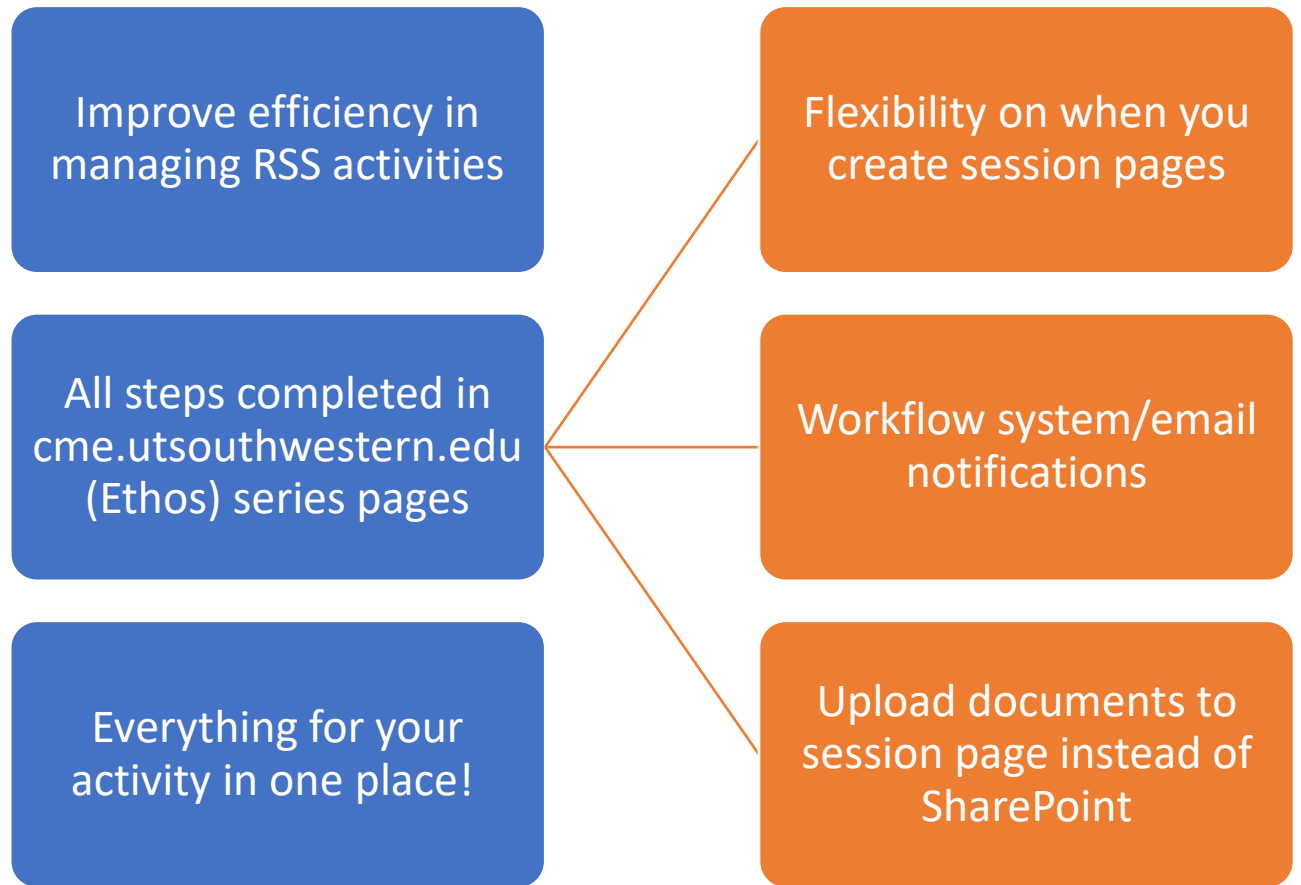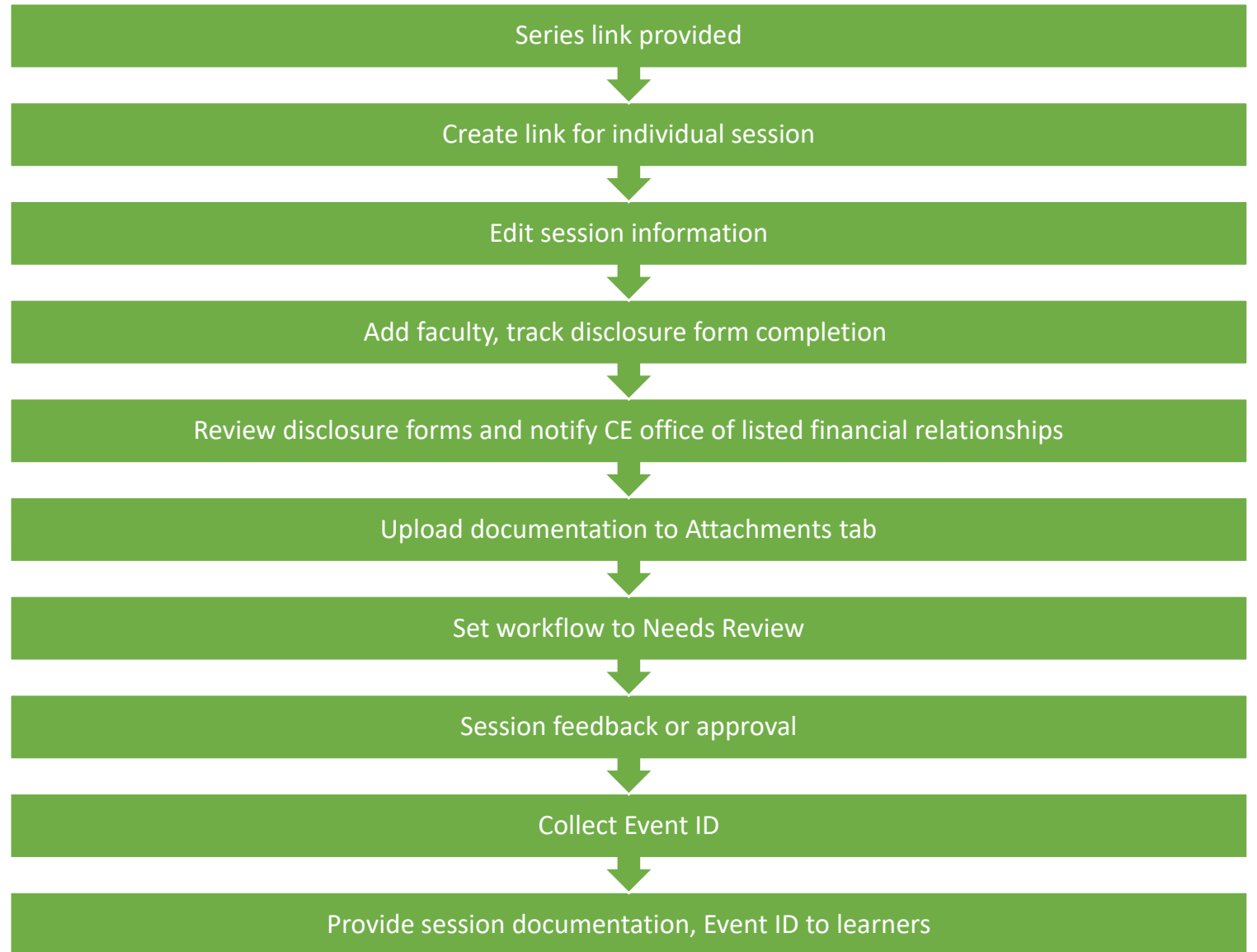
What stays the same?

Faculty management

- Faculty list
- Disclosure collection and review

Mitigation of financial relationships

Event ID upon session approval

Approval timeline!

Process overview

Series link provided

↓

Create link for individual session

↓

Edit session information

↓

Add faculty, track disclosure form completion

↓

Review disclosure forms and notify CE office of listed financial relationships

↓

Upload documentation to Attachments tab

↓

Set workflow to Needs Review

↓

Session feedback or approval

↓

Collect Event ID

↓

Provide session documentation, Event ID to learners

Step 1: Complete training, receive Series Homepage link

- After this training, you will be provided with the Series Homepage link for each of your RSS activities

- ***Bookmark this link!***

- Use this link to:
  - Create new sessions
  - Access sessions

- *(Replaces individual course links sent by CE office)*

Step 2: Create link for individual sessions

Home » 000 Sample RSS Series » 000 Sample RSS Series: "Session title" ...

000 SAMPLE RSS SERIES: "SESSION TITLE" (MMDDYY)

VIEW | EDIT | ENROLLMENTS | REMINDERS | FACULTY | COURSE OUTLINE | COURSE REPORTS | REVISIONS | REPEAT THIS SESSION

FEATURES
Group home
Home
Sessions

SESSION DATE:
01/02/2023 – 9:00am to 10:00am CST

Add to calendar:

ADD CONTENT
Session

1.00 Attendance

Enrollments are closed.

ADMIN
Members
Group dashboard
Workflow dashboard

- When to create links
  - As soon as sessions are confirmed
  - Minimum: 2 weeks prior-to session
- View template session (1st session of the year)
- Utilize "Repeat this session" function
- For activities that move around, use "Session" under "Add Content"

- *(Replaces notification via SharePoint folder, link sent from CE Office)*

Step 2: Create link for individual sessions (Repeat this session function)

- Set frequency
- Stop repeating on end date of activity
  - 12/31 for most activities
  - 8/31 for fiscal year activities only
  - Last day before summer hiatus for activities with a hiatus
- Hit Generate
  - Ethos will show skipped weeks
- Go back to Series page to view sessions

How to browse to a session page

- Start at Series Homepage
- View session listing
- Click on Session
  - Make edits
  - Add faculty
  - Upload session documentation

Step 3: Edit session information (Title & description)

Title	### RSS title: "Session title" (mmddyy) Note: use 1st session as template. This is how the session will appear on learner transcripts!
Body	Optional (but need to provide direction) Learning objectives? Activity info from announcement?
Skip (Title & description tab)	Course instructions, format, category **(DO NOT select format or specialty for RSS activities)**

Step 3: Edit session information (Time & place)

Live	Should be selected
Session date	Date/time
Location	In-person/hybrid: UT Southwestern Medical Center, Dallas, TX May specify room location under "Additional" Virtual: Online activity, Dallas, TX

Step 3: Edit session information (Course settings)

- **Skip**: do not edit default selections on this page

Step 3: Edit session information (Credit settings)

| Title & description * |
| Time & place * |
| Course settings |
| Credit settings |
| Workflow |
| Publishing |
| Attachments |

Course credit settings
Set the credit settings for this course.

▸ Self-Assessment (MOC) (Inactive)

▾ AMA (Active | Increments: 0.25 | Min: 0.00 | Max: 1.00)
- ☑ Active
- ☐ Variable credit

Increments 0.25   Min 0.00   Max 1.00
Code

Expiration type
None

▾ Attendance (Active | Increments: 0.25 | Min: 0.00 | Max: 1.00)
- ☑ Active
- ☐ Variable credit

Increments 0.25   Min 0.00   Max 1.00
Code

Expiration type
None

▸ Ethics (Inactive)

MOC	Inactive (MOC credit is reported directly to the boards)
AMA	**Active**: Set max to number of hours of session (1 hour = 1.0 credit) Should match Attendance
Attendance	**Active**: Set max to number of hours of session (1 hour = 1.0 credit) Should match AMA
Ethics	CE office use only per session. Only applies to approved sessions/activities

Educational time	Credit amount
15 minutes	0.25
1 hour	1.0
1 hour 30 minutes	1.5
2 hours	2.0

Step 3: Edit session information (Workflow)

Edit Session 000 Sample RSS Series: "Session title" (mmddyy)

View **Edit** Enrollments Reminders Faculty Course outline Course reports Revisions Repeat this session

Title & description *

Time & place *

Course settings

Credit settings

Workflow

Publishing

Attachments

Target state
○ Needs review
◉ New

Workflow comment
A comment to put in the workflow log.

- Leave "Target state" as New until session is ready for review
  - After all disclosures have been collected
  - You will come back to this page later to change the target state

Step 3: Edit session information (Publishing)

Edit Session **000 Sample RSS Series: "Session title" (mmddyy)**

View Edit Enrollments Reminders Faculty Course outline Course reports Revisions Repeat this session

Title & description *
Time & place *
Course settings
Credit settings
Workflow
Publishing
Attachments

Meta tags
Using defaults

Search API settings

Publishing options
Published

Configure the meta tags below. Tokens, e.g. "[node:summary]", automatically insert the corresponding information from that field or value, which helps to avoid redundant meta data and possible search engine penalization; see the "Browse available tokens" popup for more details.

▾ Basic tags

Browse available tokens.

Page title
The text to display in the title bar of a visitor's web browser when they view this page. This meta tag may also be used as the title of the page when a visitor bookmarks or favorites this page, or as the page title in a search engine result. It is common to append [site:name] to the end of this, so the site's name is automatically added. It is recommended that the title be no greater than 55 - 65 characters long, including spaces.

[node:title] | [current-page:pager][site:name]

Description
A brief and concise summary of the page's content, preferably 150 characters or less. Where as the description meta tag may be used by search engines to display a snippet about the page in search results, the abstract tag is used by search engines to archive a summary about the page. This will be truncated to a maximum of 380 characters.

[node:summary]

- **Skip**: Do not edit default selections on this page

Step 3: Edit session information (Attachments)

- You will come back to this page to upload session documentation for review

Step 3: Edit session information (Save)

- Select **Save** at the bottom to complete editing the session page

Step 3: Edit session information (Overview)

Where	Series homepage -> Session listing -> click on session to update
Title	### RSS title: "Session title" (date) Note: use 1st session as template. This is how the session will appear on learner transcripts!
Body	Optional
Skip (Title & description tab)	Skip: Course instructions, format, category (Do not make selections)
Session date	Date/time
Location	In-person/hybrid: UT Southwestern Medical Center, Dallas, TX May specify room location under "Additional" Virtual: Online activity, Dallas, TX
Course settings	Skip: Do not edit default selections on this page.
Credit settings	AMA, Attendance should match the amount of educational time for the session, to the quarter-hour. Do not select other options without approval.
Workflow	Leave Target state as New until ready for review
Publishing	Skip: Do not edit default selections on this page.
Attachments	Upload session documentation here
Save	Save session

Step 4: Add faculty to Faculty list, track disclosure form completion

Add faculty | Faculty list | All forms | Financial relationships

FEATURES
Group home
Home
Sessions

ADD CONTENT
Session

ADMIN
Edit Series
Features
Members
Group dashboard
Workflow dashboard

To assign a form to a faculty member, search for faculty by name in the "User" field below. If the faculty does not yet have an account, you can invite them to create an account and assign the form by entering an email address in the "Email" field below

USER
Enter the user's name and select it when it appears in a drop-down list.

EMAIL
Enter an email for users who do not yet exist.

FACULTY ROLE
☐ Committee member
☐ Course Director
☐ Medical director
☐ Moderator
☐ Peer reviewer
☐ Planner
☐ Speaker

FORM TYPE
☐ Disclosure Attestation
☐ **do not use
☐ CME Educational Materials Permission Form

☐ PUBLISHED

SEND FORM

- When to add faculty
  - As soon as session information is confirmed
  - Minimum 2 weeks before session
- Search for user by name
  - Add by email for new users
- Assign faculty role
- Assign form
  - Disclosure attestation
  - No form selected = no email sent

- *(Same process as before)*

ACCME Guidelines on the Mitigation of Financial Relationships

IDENTIFY

MITIGATE

DISCLOSE

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

Disclosures in Ethos

- ***Who? Anyone contributing to educational content for the activity***
  - Course director, planning committee, speakers, moderators, peer reviewer
- Disclosure expiration check and how often are updates needed?
  - Implemented new ACCME Standards in our system on 11/11/21: **any disclosures dated before 11/11/21 will need to be renewed**
  - Updates should be made to disclosure form every time there is a change to their financial relationships
- Disclose ANY financial relationships with ACCME-defined ineligible companies

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

FORM TYPE
☐ Disclosure Attestation
☐ **do not use
☐ CME Educational Materials Permission Form

☐ PUBLISHED

SEND FORM

SPEAKER AUTHORIZATION FOR USE OF
IMAGE, VOICE, PERFORMANCE OR LIKENESS FOR EDUCATIONAL PURPOSES
The University of Texas Southwestern Medical Center

Step 5: Review disclosure information and notify CE office of listed financial relationships

- When to review disclosures
  - Continuously until completed
- Browse back to session page
  - Go to series home page
  - Click on session
- Click on names in faculty list to review Disclosure tab in profile

- *(Same process as before)*

Reviewing the faculty list

Faculty list issue	What does this tell you?	What do you do next?
No faculty list appears	Session faculty haven't been added	Make sure to add session faculty as soon as you get the course link to populate the faculty list
No name	No profile	1) Create profile 2) If email doesn't match, they will get an error: Re-add them to faculty list 3) Complete disclosure form (cme.utsouthwestern.edu/my/edit/disclosure)
No date	No disclosure	Complete disclosure form (cme.utsouthwestern.edu/my/edit/disclosure)
Dated before 11/11/21	Disclosure needs updating	Update disclosure form (cme.utsouthwestern.edu/my/edit/disclosure)
Do they have any Financial relationships?	You won't know until you click on their name to view the disclosure tab in their profile!	1) Click on name in faculty list 2) Review disclosure tab 3) Notify CME program coordinator of financial relationship listings 1 week before conference

Step 5: Review disclosure information and notify CE office of listed financial relationships

With Financial Relationship listing

PROFILE   BIO   DISCLOSURE

FINANCIAL RELATIONSHIPS

Yes, I have had a financial relationship with an ineligible company within the past 24 months.

FINANCIAL RELATIONSHIPS:

ATTRIBUTION:
Self

TYPE OF FINANCIAL RELATIONSHIP:
Stock

INELIGIBLE COMPANY:
nfosys

TOPIC:
minimally invasive monitoring of spinal cord blood flow

Without Financial Relationship listing

PROFILE   BIO   DISCLOSURE

FINANCIAL RELATIONSHIPS

No, I have not had a financial relationship with an ineligible company within the past 24 months.

Notify CME
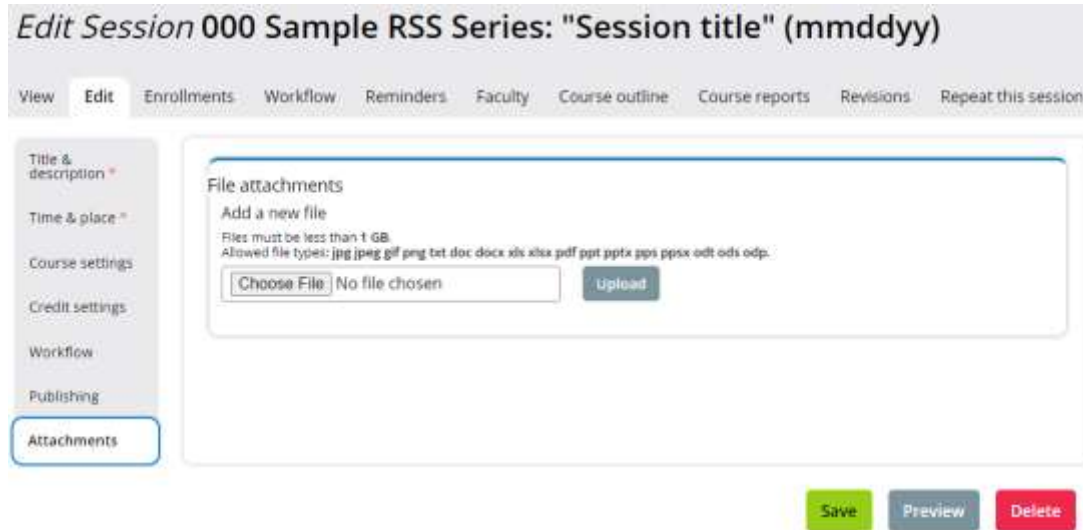
- Notify your CE program coordinator by email
- When to notify CE program coordinator of financial relationship listing
  - As soon as disclosure form is complete
  - Minimum 1 week prior-to session

- *(Same process as before)*

5) Notify OCME Admin of any listings on disclosure form

- What is a financial relationship with an ineligible company?
  - The ACCME defines an "ineligible company" as those whose primary business is producing, marketing, selling, reselling, or distributing healthcare products used by or on patients.
  - Occurring within the past 24 months
- Office of CME Program Coordinators manage mitigation
- **Notify OCME admin/ assigned CME Program Coordinator of any financial relationship listings at least 1 week prior-to session**
  - **Email your program coordinator!**
- Peer reviewer assigned to mitigate financial relationships
  - Process still handled via email in-advance of session review

Step 6: Upload session documentation to Attachments tab

- Browse back to session page
- Click on Edit
- Go to Attachments tab
- Upload Announcement, DTL, Speaker Release form, etc
  - Upload <u>completed</u> forms, not templates/placeholders!
  - Use clear file names: RSS#_Date_Announcement
- Save

- *(Replaces upload documentation to SharePoint)*

DISCLOSE

Mechanism: Disclosure To Learner (DTL) handout/signage

Who: Distributed to *Learners*

When: *Prior* to Content Delivery

Transcribe information from online disclosure form

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, 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
John Doe, MD	Course Director	None	N/A
Kimberly Jones, MD	Speaker	Speaker's Bureau Employment	Pushy Drug Rep Pharmaceuticals Medtronics
	Speaker		
	Planner		
	CME Staff		

DISCLOSE

Mechanism: Announcement

Who: Distributed to *Learners*

When: *Prior* to Content Delivery

- Create template for your activity
- **Update session details at top**
- First half of form
  - Overall activity information from annual CME application
- Second half of form
  - CME language (do not change/delete)
  - Credit hours

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 # *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, 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).

Speaker Authorization Release Form

- Guidance from UTSW Legal Department:
  - Required for ALL external speakers (Non-UTSW) - DO NOT USE FOR UTSW SPEAKERS
  - Required if live streaming and/or recording of lectures
  - If revisions to the form are requested, they will have to be reviewed and approved by UTSW Legal Department
  - If the Speaker is not agreeable to all of these terms, they cannot present.

- NOT A CME FORM

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 (1-2 weeks before)

MITIGATE

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

Who: Anyone with conflicts

When: Prior-to delivery of content (1 week before)

DISCLOSE

Mechanism: Disclosure to Learner (DTL) handout, Announcement

Who: Distributed to learners

When: Prior-to delivery of content (provided to learners before session)

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

Step 7: Update Workflow state to Needs Review

Edit Session 000 Sample RSS Series: "Session title" (mmddyy)

View | **Edit** | Enrollments | Reminders | Faculty | Course outline | Course reports | Revisions | Repeat this session

Title & description *

Time & place *

Course settings

Credit settings

Workflow

Publishing

Attachments

Target state
⦿ Needs review
◯ New

Workflow comment
A comment to put in the workflow log.

Save   Preview

- When to update workflow state
  - Everything is ready for review!
  - All disclosures completed, notification of financial relationship, documentation uploaded
  - Minimum 3 days before session
- Browse back to session page
- Click on Edit
- Go to Workflow tab
- Set Target State to Needs Review
- Add comment if needed: Address to CE program coord
- Email notification sent to prog coord
- Save
- **ATTN: Check Junk Email folder!**

- *(New step in process!)*

Check your Junk Email!
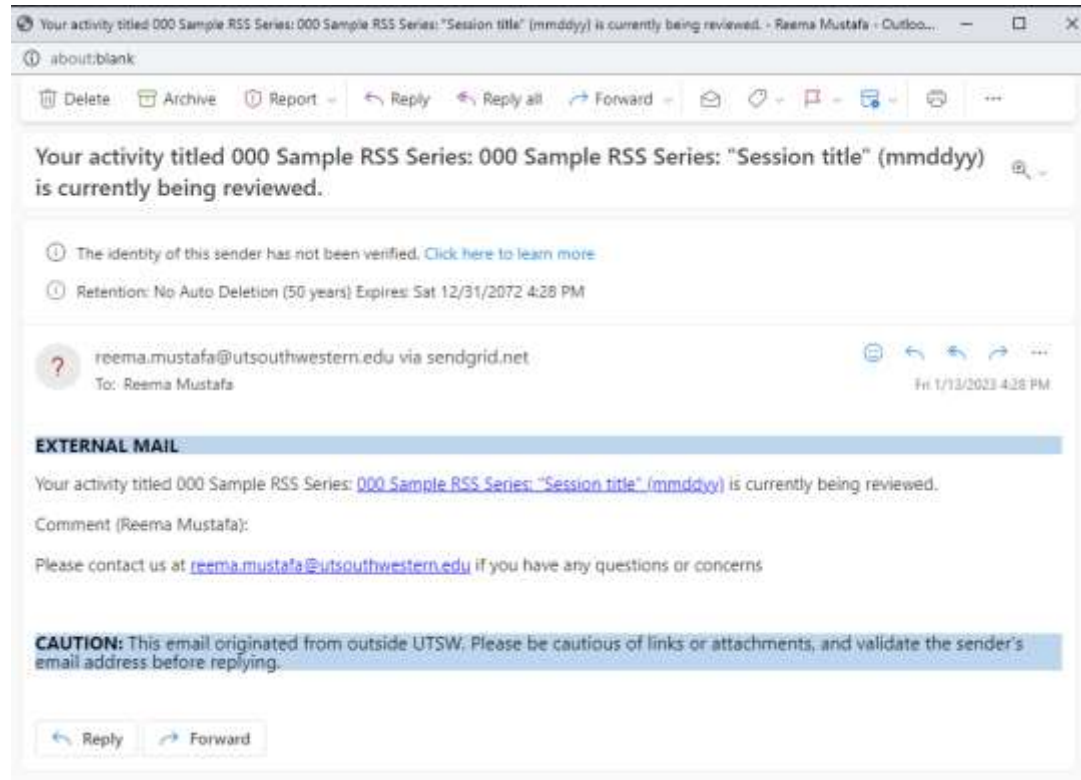
- System notifications going to Junk Email
- Notify coordinator
- "It's not junk"
- May be forwarded from CE coordinator

Step 8: Session review (Approval, Feedback)

- CE Program Coordinator will review all session components 2 days prior-to activity

- If anything is missing, workflow state will be changed to Feedback. Once missing information has been fixed, you must set workflow target state back to Needs Review

- If Approved, you will receive a system-generated email. Proceed to next step

Workflow summary

(No changes needed: skips feedback)

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

Needs Review
- Ready for CE Office Program Coord review
- All disclosures collected, notification of financial relationships sent to CE Prog Coord, session docs uploaded

In review
- Receive email system notification
- CE prog coord is reviewing the session

Feedback
- CE Office Prog Coord has identified something as missing
- Notification sent back to RSS coordinator

Approved
- Session approved
- Event ID available

If changes are needed, gets sent back to RSS Coord for correction

Step 9: Collect Event ID (Session Approved)

000 SAMPLE RSS SERIES: "SESSION TITLE" (MMDDYY)

VIEW	EDIT	ENROLLMENTS	WORKFLOW	REMINDERS	FACULTY	COURSE OUTLINE	COURSE REPORTS	REVISIONS

REPEAT THIS SESSION	CLONE

FEATURES
Group home
Home
Sessions

ADD CONTENT
Session

ADMIN
Edit Series
Features
Members
Group dashboard
Workflow dashboard

SMS CODE
KUWBUB

SESSION DATE:
01/02/2023 - 9:00am to 10:00am CST

Add to calendar:

1.00 Attendance
Enrollments are closed.

- System notification email

- Collect Event ID (SMS Code)

- Provide to learners along with session documentation

- *(Replaces email from CE office with Event ID)*

Step 9: Collect Event ID (Session Approved)

- Go to Enrollments: Settings
- SMS options
  - Open attendance: 1 hour before
  - Close attendance: 24 hours <mark>after</mark>
- Leave other fields blank/unchanged

Step 10: Provide session documentation, Event ID to learners

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

UTSouthwestern
Medical Center

- Provide Event ID to learners along with session documentation

Process overview

Step	Details
Series link provided (Bookmark!)	• Annually • Upon training completion
Create link for individual session	• As soon as sessions are confirmed • Minimum: 2 weeks prior-to session
Edit session information	• Refer to instructions
Add faculty, track disclosure form completion	• As soon as session information is confirmed • Minimum: 2 weeks prior-to session
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
Upload documentation to Attachments tab	• All session information is ready • Minimum 3 days prior-to session
Set workflow to Needs Review	• All session information is ready • Minimum 3 days prior-to session
Session feedback or approval	• CE office • System notifications
Collect Event ID	• CE office upon approval • 2 days prior-to session
Provide session documentation, Event ID to learners	• Day of activity

Timeline overview

RSS Coordinator

Create link for individual session — Minimum of 2 weeks before session

Edit session information — 2 weeks before session

Add faculty, track disclosure form completion — 2 weeks before session

Review disclosure forms and notify CE office of listed financial relationships — Continuously until disclosures are completed

Upload documentation to Attachments tab — 3 days before session

Set workflow to Needs Review — 3 days before session

Collect Event ID — 2 days before session

Provide session documentation, Event ID to learners — Day of session

CE Office

Mitigation of financial relationships — Week leading up to session

Session feedback or approval — 2 days before session

FAQ

Email your CE program coordinator!

- Financial relationship notification!

- MOC quiz questions

- Ethics, other specialty credit requests

Can I get a copy of the slides?

https://cme.utsouthwestern.edu/rss-coordinator/
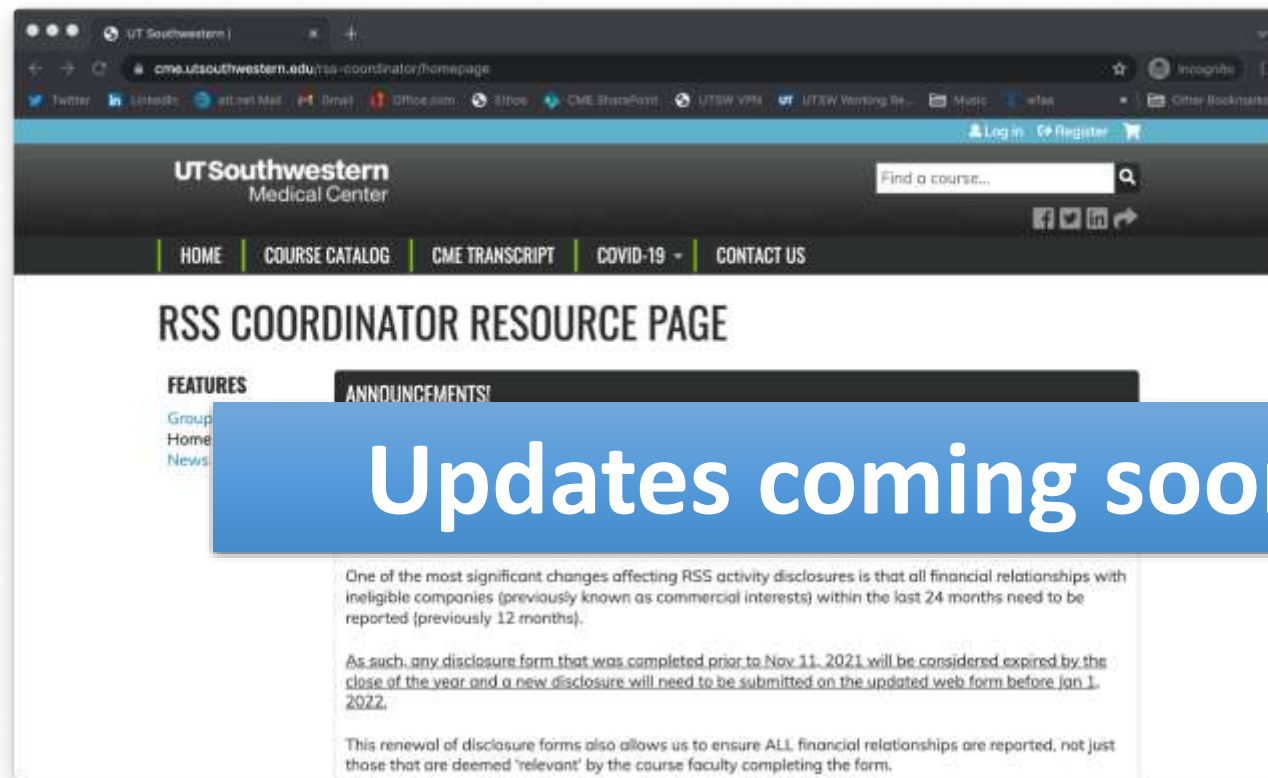
Process Reminders: When is it due? (Set workflow to Needs Review)

ALL Materials due!	CME Review	Session
Wednesday before	Thursday before	**Monday**
Thursday before	Friday before	**Tuesday**
Friday before	Monday	**Wednesday**
Monday	Tuesday	**Thursday**
Tuesday	Wednesday	**Friday, Sat/Sun**

3 bus. Day before	2 bus. Day before	1 bus. Day before	Day of Session
All steps complete!	CME review		Session
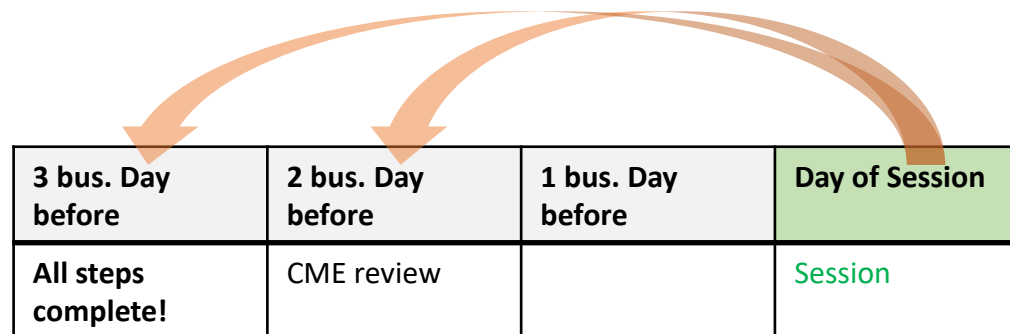
Why didn't I get an Event ID?

Cause	Review steps
Disclosures not completed	See Step 4: Please keep checking disclosures
Financial relationships not brought to CE office attn/ mitigation not completed	See Step 5: Review disclosure information
Didn't mark session as "Needs Review"	See Step 7: Note for next session
Didn't follow timeline	See Process Overview

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 1 person
I will be out-of-office	Work with CE Prog Coord ahead of leave
What about SharePoint	We will no longer be using SharePoint in this new process, but will not be removing any info

FAQ: I have a last-minute change to my session

- **Do not set workflow to "Needs Review" until all session info is confirmed**
- If a session has already been marked as "In Review"
    - Notify CE office by email
    - Session sent to Feedback
    - Make changes in session
    - Set workflow as "Needs Review" once changes are complete
- If a session has already been Approved
    - Notify CE office by email

We're here to help!

- Communicate!
  - Having trouble collecting disclosures
  - Notify of financial relationships!
  - Keep course director in the loop

- Power = responsibility
  - You have flexibility with this module, but please be mindful of the whole process and CE office deadlines!

Next steps

- View Series homepage, first session created
- Utilize "repeat this session" function to setup courses for rest of 2023
- **Work in this new system for first April session starting mid-March**

CE Office Hours: 1pm Thursday 3/16

- FAQ
- Screen-share time
- Quick refresher
- [Registration link](#)

Questions?

Step	Details
Series link provided (Bookmark!)	• Annually • Upon training completion
Create link for individual session	• As soon as sessions are confirmed • Minimum: 2 weeks prior-to session
Edit session information	• Refer to instructions
Add faculty, track disclosure form completion	• As soon as session information is confirmed • Minimum: 2 weeks prior-to session
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
Upload documentation to Attachments tab	• All session information is ready • Minimum 3 days prior-to session
Set workflow to Needs Review	• All session information is ready • Minimum 3 days prior-to session
Session feedback or approval	• CE office • System notifications
Collect Event ID	• CE office upon approval • 2 days prior-to session
Provide session documentation, Event ID to learners	• Day of activity

Series Homepage Link

https://cme.utsouthwestern.edu/series/2023/###