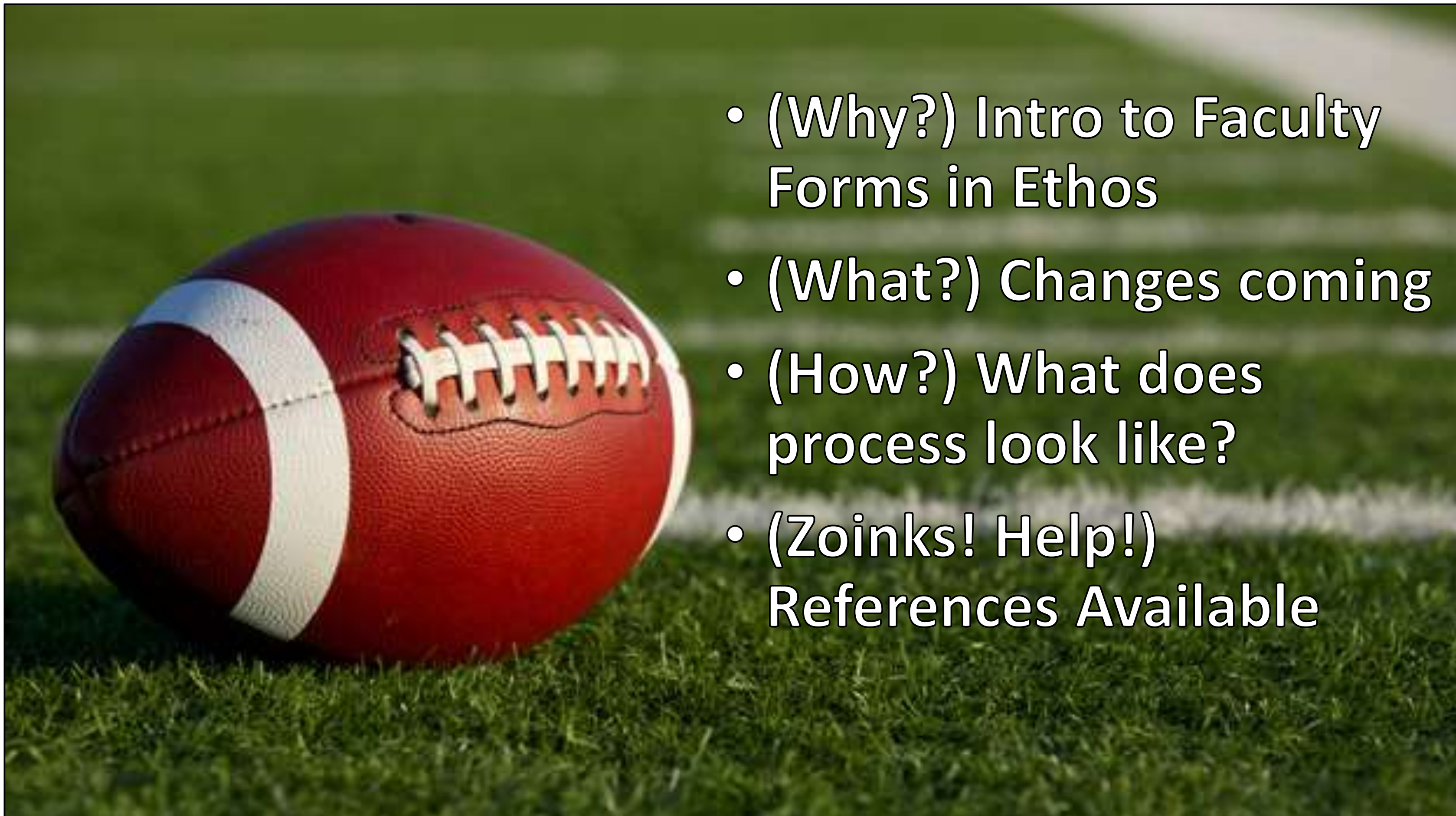
RSS Coordinator Training

Managing Faculty Forms in Ethos

September 13, 2018

Training Outline (Playbook)



Faculty Forms Feature in Ethos

Look at how far we've come! Thank you!

- Reaccredited through March 2022!!
- 90+ RSS activities in compliance!!

What is on the horizon?

- Ethos can be a 'One Stop Shop' for CME activity processes
- More efficiency - Less duplication efforts
- Resolution mechanisms consistent across all CME activities (ACCME Compliance!)

Flag on the Play!

Say Adios to…

- Duplicate disclosure forms
- SharePoint
- Paper-handling
- Printer/scanner issues
- Inbox full

So you want to have an RSS session…

Old Process: SharePoint	New Process: Ethos
• Create folder for upcoming session • CME office does full review 2-days prior-to session • No centralized disclosure database	• Course page to be created in-advance to add faculty • RSS Session creation form • Improved forecasting of upcoming sessions • Centralized disclosure database: linked to Ethos profiles

1) Request RSS Session

- Create session folder in SharePoint
- This is our cue to create a session
- **Complete 2 weeks prior-to session**
- Helpful to have announcement at this point (variable hour activities)
- CME Office Admin will send course page link via email

2) Add faculty to course page, assign forms and confirm completion

- Add faculty to course page link **for that session**
- Assign Faculty Forms
  - **Disclosure Attestation Form**
    - Queue for faculty to go in and complete their disclosures
    - Monitor disclosure form completion

Disclosures are linked to Ethos user profiles

3) Notify OCME Admin of any conflicts

<table>
<tr><th></th><th>Old Process</th><th>New Process</th></tr>
<tr><td>Didactic</td><td>Department RSS coordinator uploads completed resolution paperwork (CCR, slides) to SharePoint</td><td rowspan="2">• Office of CME Program Coordinators manage resolutions
• Notify OCME admin/ assigned CME Program Coordinator of conflicts at least 1 week prior-to session
• Peer reviewer assigned to resolve conflicts</td></tr>
<tr><td>Case Conferences</td><td>Department RSS coordinator uploads attestation to SharePoint</td></tr>
</table>

Identify non-conflicted peer reviewer for each RSS activity

4) Upload RSS documentation to SharePoint

- Upload Announcement, DTL
  - Follow naming convention: RSS#_Date_Announcement
- Speaker Release form
  - Speakers in activities with streaming
  - Speakers in activities that get posted/uploaded
    - Mediasite, library repository, Enduring materials
  - All external speakers
- CME Office Admin reviews 2-days prior-to event

5) Provide Event ID, RSS documentation to learners

- Confirmed faculty forms, disclosures completed
- Announcement, DTL uploaded
- Receipt of Event ID number from OCME Admin (Vanessa-QB)
- Provide Event ID, Announcement, DTL to learners


Live Demo

Demo outline

1. RSS Session creation form
2. Session homepage
3. Faculty tabs; what they do
4. Add faculty
5. Status checks
   1. Did my faculty complete their disclosure forms?
   2. Does my faculty have a conflict of interest?
   3. Are all assigned forms completed?
6. RSS Documentation upload form

RSS SESSION CREATION FORM

VIEW | EDIT | WEBFORM | RESULTS | CLONE

You have already submitted this form. View your previous submissions.

This form provides the information required to create sessions in Ethos. Please provide this information at least **2 weeks** ahead of each of your planned sessions.

RSS ACTIVITY *

- Select -

SESSION DATE *

Month ▾ Day ▾ Year ▾

SESSION TYPE

- Lecture/Didactic
- Tumor Board, Case Presentation, M&M
- Journal Club

SESSION TITLE

For didactic lectures, please provide presentation title(s) for this session, if known.

SESSION START TIME

Hour : 00 am pm

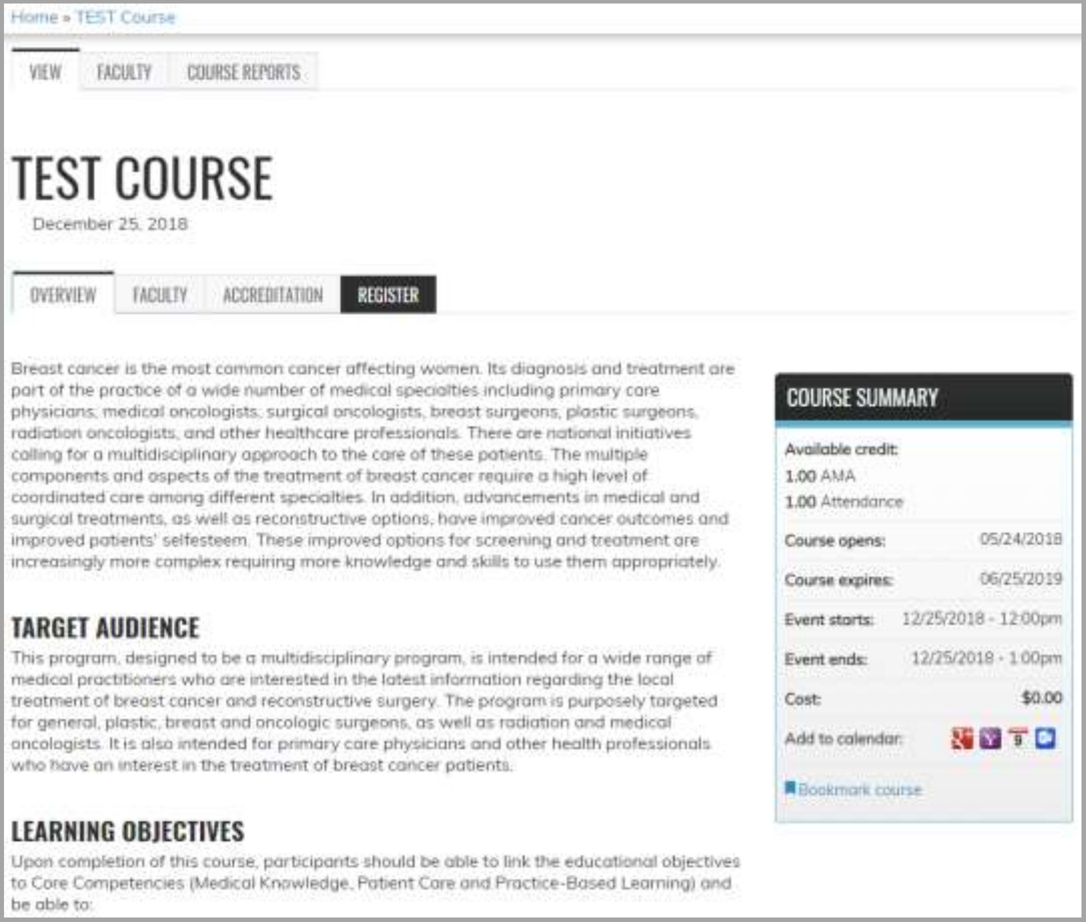
SESSION END TIME

Hour : 00 am pm

LOCATION

SAVE DRAFT SUBMIT

Course Page (example): Add faculty to course page



Home » TEST Course

VIEW | FACULTY | COURSE REPORTS

TEST COURSE

December 25, 2018

OVERVIEW | FACULTY | ACCREDITATION | REGISTER

Breast cancer is the most common cancer affecting women. Its diagnosis and treatment are part of the practice of a wide number of medical specialties including primary care physicians, medical oncologists, surgical oncologists, breast surgeons, plastic surgeons, radiation oncologists, and other healthcare professionals. There are national initiatives calling for a multidisciplinary approach to the care of these patients. The multiple components and aspects of the treatment of breast cancer require a high level of coordinated care among different specialties. In addition, advancements in medical and surgical treatments, as well as reconstructive options, have improved cancer outcomes and improved patients' selfesteem. These improved options for screening and treatment are increasingly more complex requiring more knowledge and skills to use them appropriately.

TARGET AUDIENCE

This program, designed to be a multidisciplinary program, is intended for a wide range of medical practitioners who are interested in the latest information regarding the local treatment of breast cancer and reconstructive surgery. The program is purposely targeted for general, plastic, breast and oncologic surgeons, as well as radiation and medical oncologists. It is also intended for primary care physicians and other health professionals who have an interest in the treatment of breast cancer patients.

LEARNING OBJECTIVES

Upon completion of this course, participants should be able to link the educational objectives to Core Competencies (Medical Knowledge, Patient Care and Practice-Based Learning) and be able to:

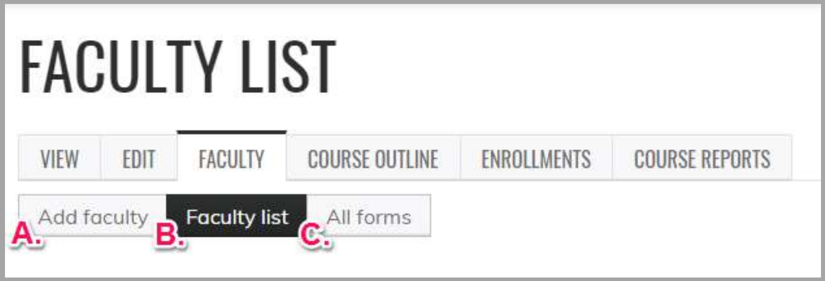
COURSE SUMMARY

Available credit:
1.00 AMA
1.00 Attendance

Course opens:	05/24/2018
Course expires:	06/25/2019
Event starts:	12/25/2018 - 12:00pm
Event ends:	12/25/2018 - 1:00pm
Cost:	$0.00
Add to calendar:	

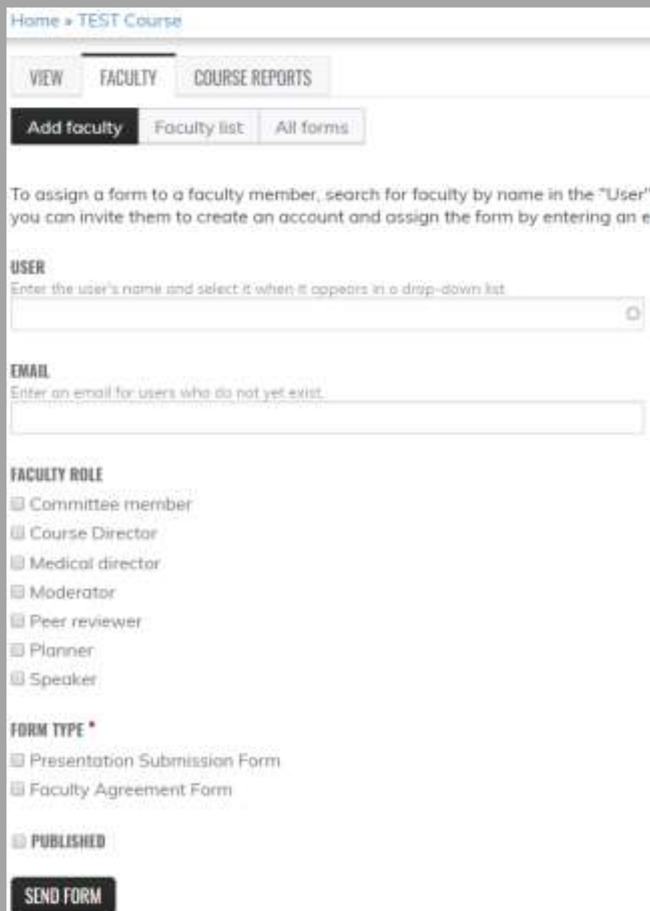
Bookmark course

What Each Tab Does



A. Adds faculty
B. Edit/Modify completed or pending forms
C. View Form(s)

Go to “Add faculty” tab


Home » TEST Course

VIEW | FACULTY | COURSE REPORTS

Add faculty | Faculty list | All forms

To assign a form to a faculty member, search for faculty by name in the "User"
you can invite them to create an account and assign the form by entering an e

1. 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.

2. FACULTY ROLE

- Committee member
- Course Director
- Medical director
- Moderator
- Peer reviewer
- Planner
- Speaker

3. FORM TYPE *

- Presentation Submission Form
- Faculty Agreement Form

4. PUBLISHED

5. SEND FORM

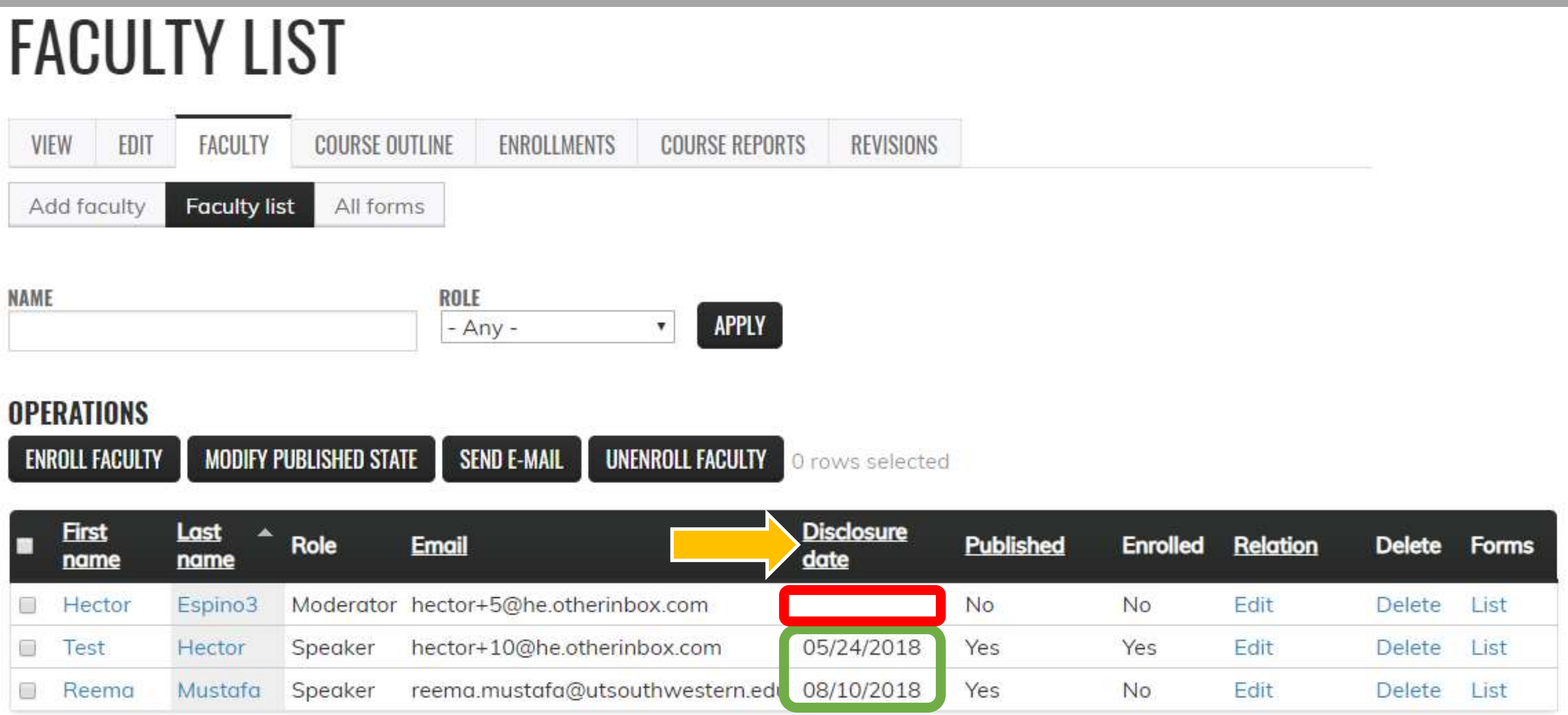
1. Enter username

   - If they do NOT yet have a profile, enter email instead

2. Select their role in the RSS activity
3. Assign at least 1 form
4. Select Published
5. Send form

Status checks: Faculty list

- "Did my faculty complete their disclosure form?"



FACULTY LIST

VIEW | EDIT | FACULTY | COURSE OUTLINE | ENROLLMENTS | COURSE REPORTS | REVISIONS

Add faculty | Faculty list | All forms

NAME

ROLE - Any -

APPLY

OPERATIONS

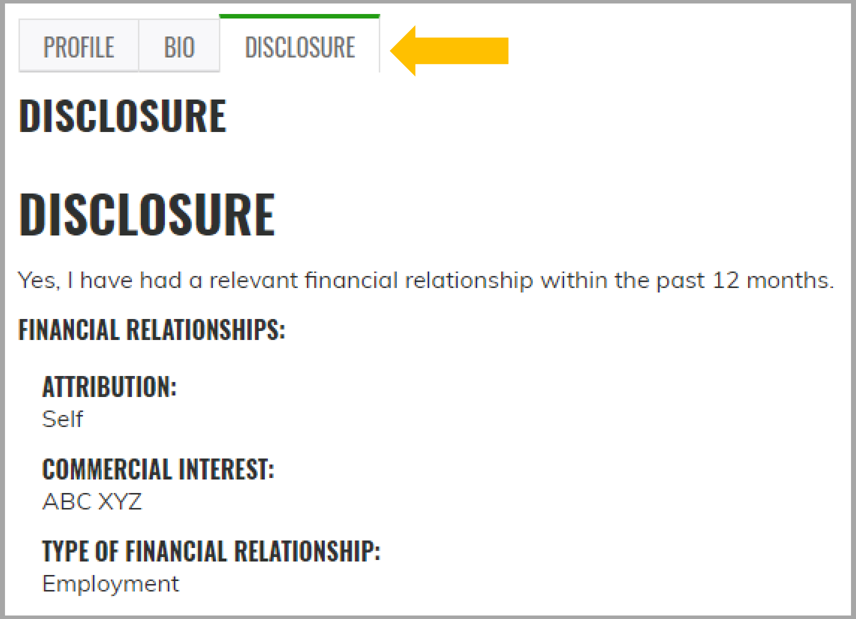
ENROLL FACULTY | MODIFY PUBLISHED STATE | SEND E-MAIL | UNENROLL FACULTY | 0 rows selected

	First name	Last name	Role	Email	Disclosure date	Published	Enrolled	Relation	Delete	Forms
	Hector	Espino3	Moderator	hector+5@he.otherinbox.com		No	No	Edit	Delete	List
	Test	Hector	Speaker	hector+10@he.otherinbox.com	05/24/2018	Yes	Yes	Edit	Delete	List
	Reema	Mustafa	Speaker	reema.mustafa@utsouthwestern.edu	08/10/2018	Yes	No	Edit	Delete	List

Status checks: Disclosures

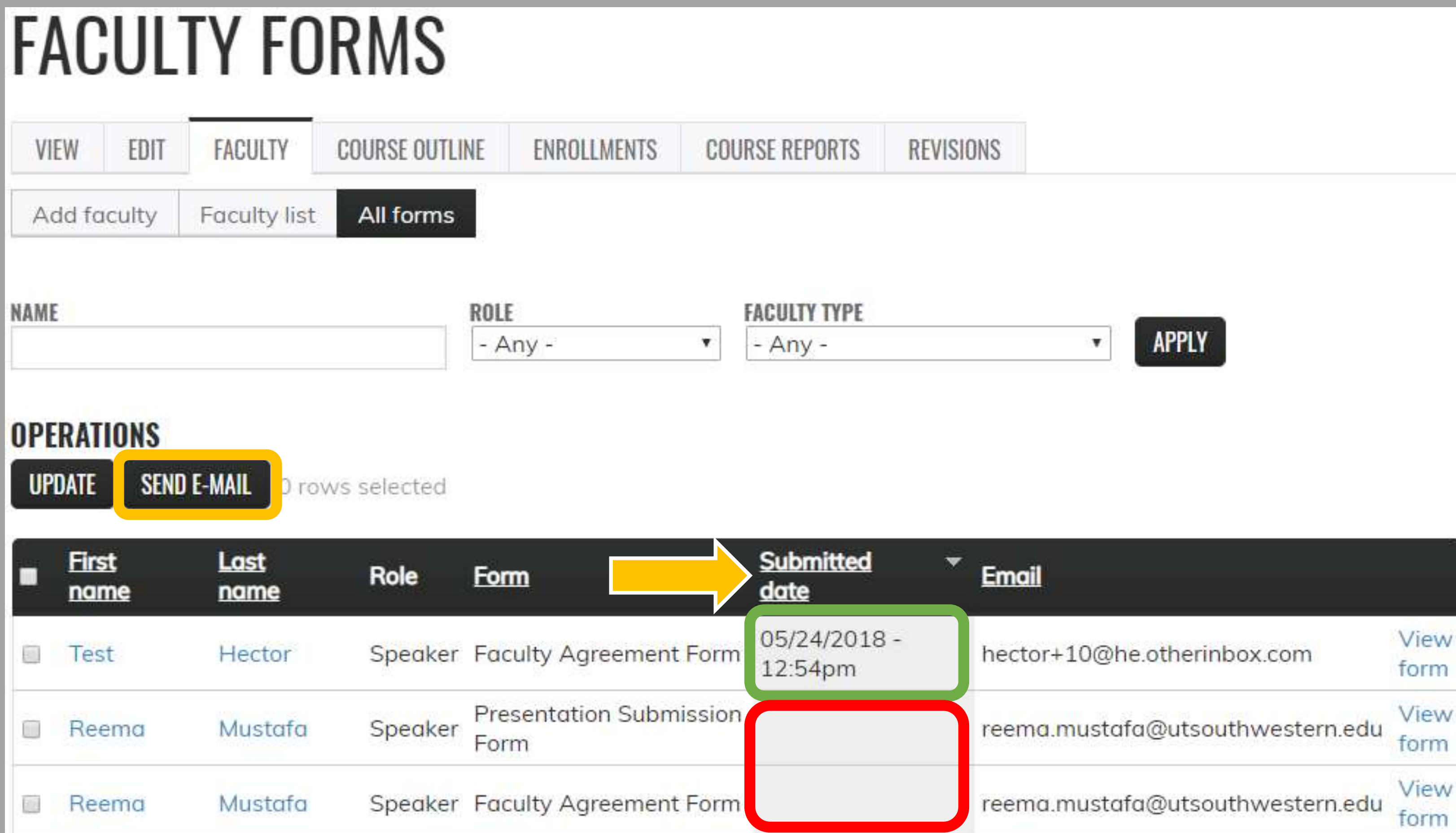
"Does my faculty have a conflict of interest?"

1. Click on name in faculty list
2. Go to "Disclosure" tab in Profile



Status checks: All forms

- “Are all assigned forms completed?”



RSS DOCUMENTATION UPLOAD FORM

VIEW | EDIT | WEBFORM | RESULTS | CLONE

You have already submitted this form. View your previous submissions.

This form provides the information required to certify sessions for credit. Please provide this information at least **2 days** ahead of each of your planned sessions.

RSS ACTIVITY *

- Select -

SESSION DATE *

Month ▾ Day ▾ Year ▾

ANNOUNCEMENT *

Files must be less than 2 MB.
Allowed file types: txt rtf html pdf doc docx odt ppt pptx odp xls xlsx ods xml.

Choose File No file chosen UPLOAD

DISCLOSURE TO LEARNER *

Files must be less than 2 MB.
Allowed file types: txt rtf html pdf doc docx odt ppt pptx odp xls xlsx ods xml.

Choose File No file chosen UPLOAD

SESSION TYPE *

- Lecture/Didactic
- Tumor Board, Case Presentation, M&M
- Journal Club
- Other

SESSION TITLE *

Please confirm the title(s) for this didactic lecture activity.

SAVE DRAFT SUBMIT

Summary (Let’s Make Some Noise!)

1. Request RSS session in SharePoint: Session folder
2. Add faculty to session page, confirm completion of disclosure forms and review
3. Notify OCME Admin/CME Program Coordinator of any conflicts – **1 week prior-to session!**
4. Upload RSS documentation to SharePoint
5. Provide Event ID, RSS documentation to learners

Bonus (Extra Point!)

- Managing users in Ethos
  - View profile information
    - Disclosure
  - Verify mobile number

- Transcript download in user profiles only

Process Summary

More than 2 weeks before session	• Notify OCME of upcoming session: SharePoint folder
2 weeks before session	• Add faculty to course page • Assign faculty forms • Notify CME coordinator of any conflicts, if needed
Week before session	• CME office resolves conflicts
2 days before session	• Generate Announcement, DTL, and upload to SharePoint • CME office audits forms
Day of session	• Provide Event ID, Announcement, DTL to learners

ACCME Guidelines on the Resolution of Personal Conflicts of Interest

IDENTIFY

Mechanism: Disclosure forms in Ethos

Who: Speakers, Course director, Planning committee

When: Prior-to delivery of content

RESOLVE

Mechanism: Notice to OCME 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!

Kickoff!

- **All RSS activities will follow this process starting with October 1 activities**
- Start putting in your requests (RSS Session Creation form)

CME Program Coordinators (Starting Lineup)

Resolves Conflicts of Interest

Point-of-contact for your department's educational needs

Vanessa White, OCME Admin

- Initial point-of-contact for RSS questions
- Creates course pages, emails to Dept Coord
- Audits faculty in course page, RSS documentation
- Issues Event ID numbers
- Processes C&L forms
- Provides support for all RSS activities

Reemma Mustafa

- Infectious Diseases
- Radiology
- Global Health
- Surgery
- Family Medicine
- Digestive
- Physical Medicine & Rehabilition
- Nephrology
- Quality

Kimberly Jones

- Cardiology
- OB/GYN
- Pediatrics
- Psychiatry
- Otolaryngology
- Dermatology
- Hematology/Oncology
- Cancer Center
- Ethics Grand Rounds

Mark Vinciguerra

- Neurology & Neurotherapeutics
- Ophthalmology
- Digestive & Liver Disease
- Pathology
- Geriatric Medicine
- Urology
- Internal Medicine
- Emergency Medicine
- Liver Transplant
- Rheumatic Diseases

Deborah Land, OCME Assoc. Director

- Office of Medical Education
- Advanced Practice Providers Advisory Board

Resources

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

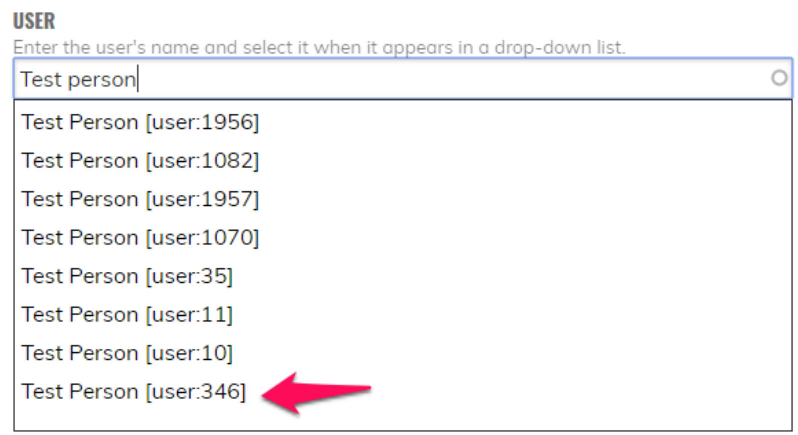
Questions?

Managing Duplicate Persons

From “Manage Users” page you may identify the “User ID” from the ID column

ID	First name	Last name	E-mail
10	Test	Person	hector.espino+1
11	Test	Person	hector.espino+2
35	Test	Person	cmeregistration
38	Jane	Tester	ataylor+2@dlc-
39	Jane	Testing	ataylor+10@dlc
41	taylor	Test	ataylor+11@dlc
77	Test	User	testuser@dlc-s
346	Test	Person	hector+01@he
423	Test	Hector	hector+10@he

The “User ID” will be in brackets, next to their name, to help identify the faculty member needed



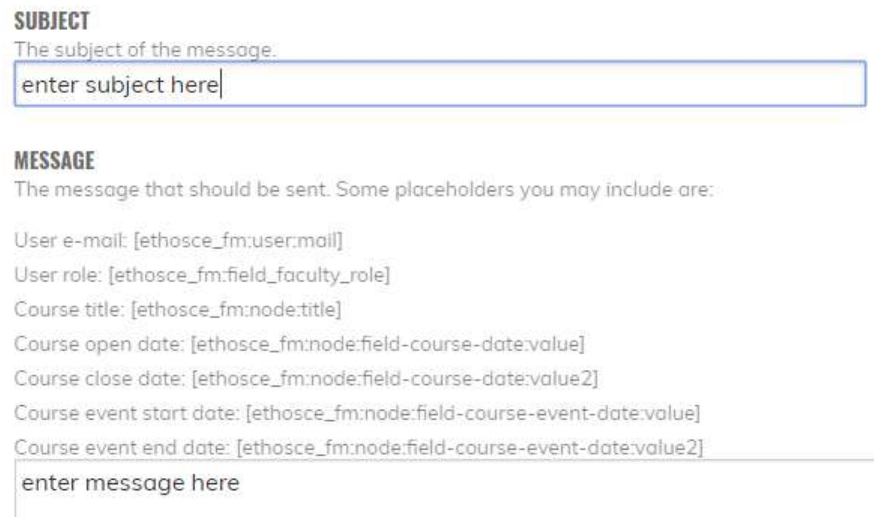
-optional-
Send Email

Under the “Faculty List” tab:

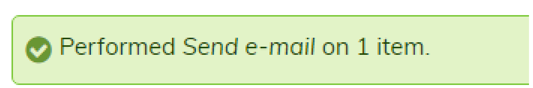
1. Check the faculty member(s) that you would like to email
2. Select the “Send Email” button
3. You may personalize the email and select the “Next” button:
   a. Send instructions on how to complete forms or find them in their profile
   b. Reminder to complete form
   c. Information regarding course
4. Select “Confirm” button
5. Confirmation will appear

2.

3.



5.



Go to FACULTY tab in course page link provided

- Example: https://cme.utsouthwestern.edu/node/108110