

RSS Coordinator Training

Managing Faculty Forms in Ethos

September 13, 2018

Training Outline (Playbook)

- (Why?) Intro to Faculty Forms in Ethos
- (What?) Changes coming
- (How?) What does process look like?
- (Zoinks! Help!) References Available

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
<ul style="list-style-type: none"> • Create folder for upcoming session • CME office does full review 2-days prior-to session • No centralized disclosure database 	<ul style="list-style-type: none"> • Course page to be created in-advance to add faculty <ul style="list-style-type: none"> • RSS Session creation form • Improved forecasting of upcoming sessions • Centralized disclosure database: linked to Ethos profiles

1) Request RSS Session in Ethos

- RSS Session Creation Form in Ethos
- <https://cme.utsouthwestern.edu/rss-create>
- This is our cue to create a session
- Complete 2 weeks prior-to session
- Minimum info needed to create the course page
 - RSS Activity
 - Date, Time
- 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
 - **Faculty Agreement Form**
 - Applies to all faculty, for every session
 - **Presentation Submission Form**
 - All activities with streaming
 - All activities that get posted/uploaded
 - Mediasite, library repository, Enduring materials
 - All external speakers
 - Peer Review

Disclosures are linked to Ethos user profiles

3) Notify OCME Admin of any conflicts

	Old Process	New Process
Didactic	Department RSS coordinator uploads completed resolution paperwork (CCR, slides) to SharePoint	<ul style="list-style-type: none"> • Office of CME Program Coordinators manage resolutions • Notify OCME admin/assigned CME Program Coordinator of conflicts <u>at least 1 week prior-to session</u>
Case Conferences	Department RSS coordinator uploads attestation to SharePoint	<ul style="list-style-type: none"> • Peer reviewer assigned to resolve conflicts

Identify non-conflicted peer reviewer for each RSS activity

4) Upload RSS documentation to Ethos

- RSS Documentation Upload Form in Ethos
- <https://cme.utsouthwestern.edu/rss-docs>
- Verify course information
 - RSS activity
 - Date
 - Title
- Upload Announcement, DTL
 - Follow naming convention: RSS#_Date_Announcement
- 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 26, 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' self-esteem. 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: 06/29/2019

Event starts: 12/25/2018 - 12:00pm

Event ends: 12/25/2018 - 12:00pm

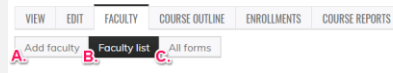
Cost: \$0.00

Add to calendar:    

[Bookmark course](#)

What Each Tab Does

FACULTY LIST



- 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 email

1. **USER**
Enter the user's name and select it when it appears in a drop-down list.
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**
☐ 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
<input type="checkbox"/>	Hector	Espino3	Moderator	hector+5@he.otherinbox.com		No	No	Edit	Delete	List
<input type="checkbox"/>	Test	Hector	Speaker	hector+10@he.otherinbox.com	05/24/2018	Yes	Yes	Edit	Delete	List
<input type="checkbox"/>	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

First name	Last name	Role	Email	Disclosure date
Hector	Espino3	Moderator	hector+5@he.otherinbox.com	
Test	Hector	Speaker	hector+10@he.otherinbox.com	05/24/2018
Reema	Mustafa	Speaker	reema.mustafa@utsouthwestern.edu	08/10/2018

PROFILE BIO **DISCLOSURE**

DISCLOSURE

Yes, I have had a relevant financial relationship within the past 12 months.

FINANCIAL RELATIONSHIPS:

ATtribution:
Self

COMMERCIAL INTEREST:
ABC XYZ

TYPE OF FINANCIAL RELATIONSHIP:
Employment

Status checks: All forms

- “Are all assigned forms completed?”

FACULTY FORMS

VIEW EDIT FACULTY COURSE OUTLINE ENROLLMENTS COURSE REPORTS REVISIONS

Add faculty Faculty list All forms

NAME ROLE FACULTY TYPE APPLY

OPERATIONS

UPDATE SEND E-MAIL 0 rows selected

	First name	Last name	Role	Form	Submitted date	Email	
<input type="checkbox"/>	Test	Hector	Speaker	Faculty Agreement Form	05/24/2018 - 12:54pm	hector+10@he.otherinbox.com	View form
<input type="checkbox"/>	Reema	Mustafa	Speaker	Presentation Submission Form		reema.mustafa@utsouthwestern.edu	View form
<input type="checkbox"/>	Reema	Mustafa	Speaker	Faculty Agreement Form		reema.mustafa@utsouthwestern.edu	View form

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 *

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
 No file chosen

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
 No file chosen

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.

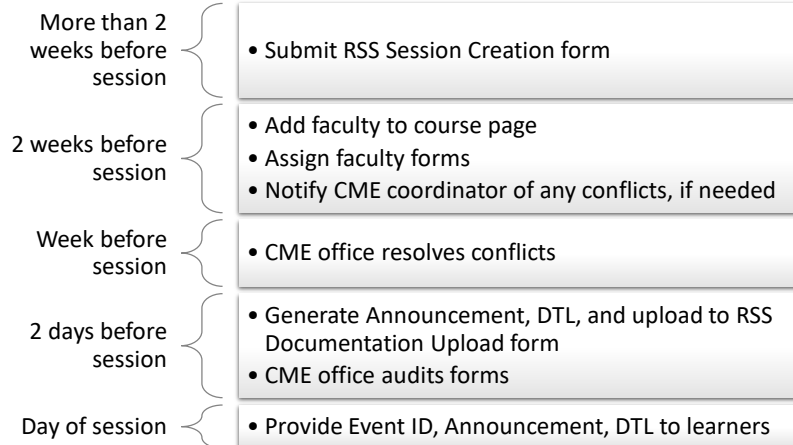
Summary (Let's Make Some Noise!)

1. Request RSS session in Ethos
2. Add faculty to session page, assign forms and confirm completion
3. Notify OCME Admin/CME Program Coordinator of any conflicts
4. Upload RSS documentation to Ethos
5. Provide Event ID, RSS documentation to learners

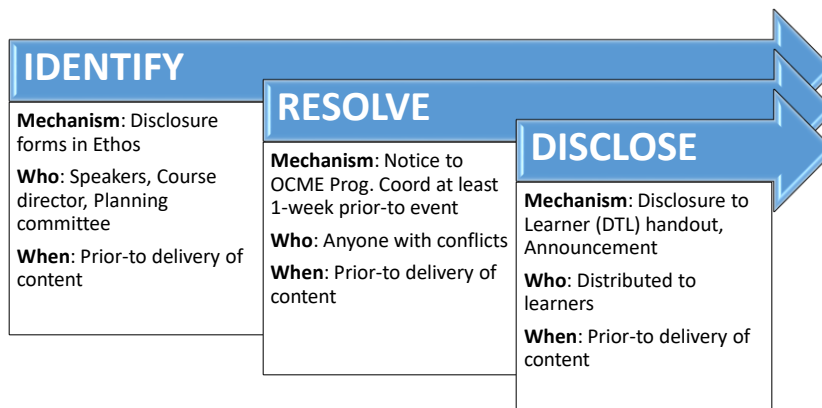
Bonus (Extra Point!)

- Managing users in Ethos
 - View profile information
 - Disclosure
 - Verify mobile number
- Transcript download in user profiles only

Process Summary



ACCME Guidelines on the Resolution of Personal Conflicts of Interest



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

Reema Mustafa

- Infectious Diseases
- Emergency Medicine
- Radiology
- Global Health
- Surgery
- Family Medicine
- Quality

Kimberly Jones

- Cardiology
- OB/GYN
- Pediatrics
- Psychiatry
- Otolaryngology
- Dermatology
- Ethics Grand Rounds

Mark Vinciguerra

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

Chalan King

- Cancer Center
- Internal Medicine (General)
- Physical Medicine & Rehabilitation
- Anesthesiology & Pain Management
- Hematology/Oncology
- Nephrology

Deborah Land, OCME Assoc. Director

- Office of Medical Education
- Advanced Practice Providers Advisory Board

Resources

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

Managing Duplicate Persons

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

ID	First name	Last name	Email
10	Test	Person	hactor.espin@utsouthwestern.edu
11	Test	Person	hactor.espin@utsouthwestern.edu
25	Test	Person	cmeregulation@utsouthwestern.edu
35	Jane	Taylor	ataylor@utsouthwestern.edu
38	Jane	Taylor	ataylor@utsouthwestern.edu
41	Jane	Taylor	ataylor@utsouthwestern.edu
12	Test	User	testuser@utsouthwestern.edu
346	Test	Person	hactor.espin@utsouthwestern.edu
602	Test	Hector	hactor.espin@utsouthwestern.edu

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

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

Test person

- Test Person [user:1956]
- Test Person [user:1082]
- Test Person [user:1957]
- Test Person [user:1070]
- Test Person [user:35]
- Test Person [user:11]
- Test Person [user:10]
- Test Person [user:346]

-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.

SEND E-MAIL

3.

SUBJECT

The subject of the message.

enter subject here

MESSAGE

The message that should be sent. Some placeholders you may include are:

User e-mail: [ethosce_fm:user:mail]

User role: [ethosce_fm:field_faculty_role]

Course title: [ethosce_fm:node:title]

Course open date: [ethosce_fm:node:field-course-date:value]

Course close date: [ethosce_fm:node:field-course-date:value2]

Course event start date: [ethosce_fm:node:field-course-event-date:value]

Course event end date: [ethosce_fm:node:field-course-event-date:value2]

enter message here

5.

✔ Performed Send e-mail on 1 item.

Go to FACULTY tab in course page link provided

- Example:

<https://cme.utsouthwestern.edu/node/108110>

