



Hands-On Workshop in RSS
Dashboard Skills,
CME Attendance-Keeping,
and E-Sign-In
(interactive/self-paced)

2020 TRAINING MODULE FOR
CME FIELD AGENTS OF NYU LISOM

This module includes a **scored skill assessment**, to satisfy your training requirement for series recognition

- ▶ Completing the self-paced module will **alert the CME staff** to scored your work. A score of 100% is required. You may attempt the self-paced module up to 3 times to achieve 100% competency.
- ▶ If you are unable to achieve 100%, you can request a **hands-on competency coaching session** with a web-conferenced instructor. Your performance in the instructor-led competency **coaching will be scored** and will require you to achieve 100% competency.
- ▶ You must show two scored attempts on the **self-paced module** BEFORE scheduling instructor-led coaching, and due to a shortage in coaching availability, you will be permitted to book only 1 coaching in order to pass. After you attempt the self paced module 2x, a registration code for instructor-led coaching will be available.
- ▶ If you do not pass **either** competency module at 100% at least once, your RSS series cannot be recognized for 2021 CME credits.

Prepare your workstation:

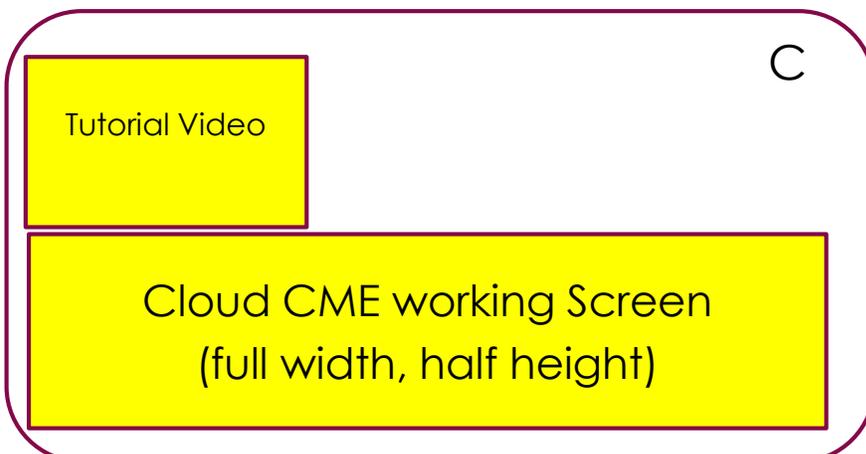
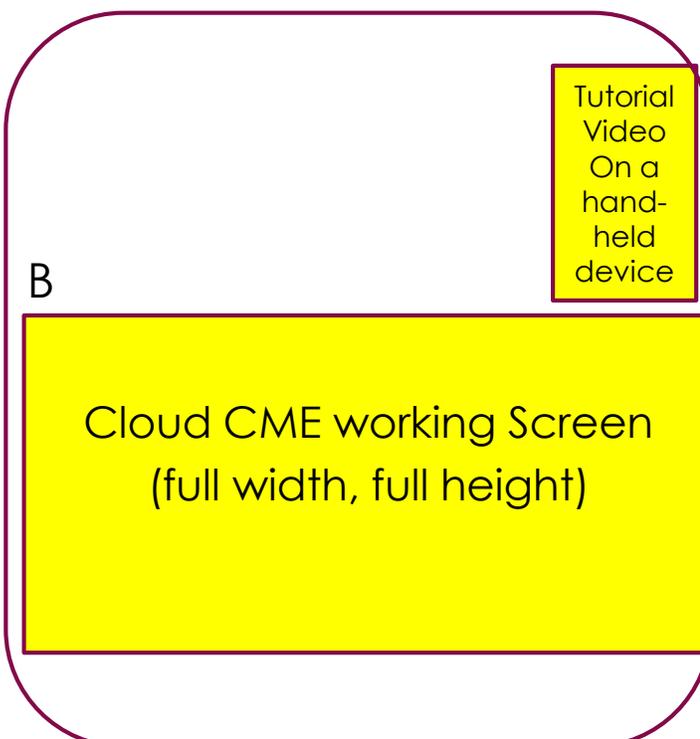
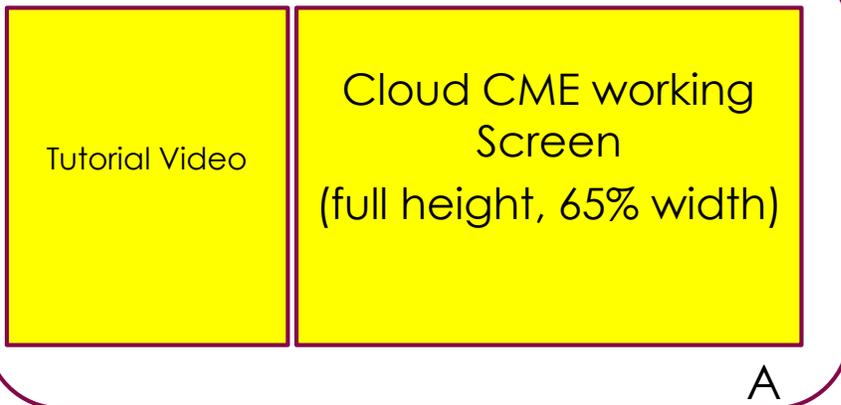
Tools will need for this interactive self-paced lesson

- ▶ This tutorial contains several demonstrations paired with hands-on practice tasks. To complete this tutorial **and receive a passing score**, you will need these technologies:
 1. An internet connected computer
 2. A web browser connected to CloudCME
 - ▶ <https://Winthrop.Cloud-CME.com>
 3. Your NYU KerberosID for logging into CloudCME
 4. **Sufficient screen space:** We recommend a two-screen set up (one screen for the tutorial video and one screen to do your hands-on tasks in.
 5. Alternately, Two web browser windows can be positioned side-by-side on your screen, as in the diagram on the next page.
 6. However, arrange the screens in the way most comfortable to allow you to complete the tutorial.

Optional: Configure your browser windows (if needed)

1. When the lesson video pauses, **open a second browser window** and navigate to <https://Winthrop.Cloud-CME.com>
2. **Position/Resize the current video window** to occupy the half of your screen.
3. **Position/Resize the new CloudCME window** to occupy the other half of your screen.
4. You can change the zoom level of the Cloud-CME window if needed:
 - ▶ **On Windows, use the keys: Ctrl – or Ctrl +**
 - ▶ **On Mac use the keys: ⌘ - or ⌘ +**
5. Once your browser windows are positioned comfortably, **click the Continue button**

Three possible screen combinations



By the end of this course, you will be able to:

- 1. Analyze roles and responsibilities** for handling CME credit and attendance data.
- 2. Differentiate among options for Attendance Tracking** in CME, including a) **Self-claiming**, b) **Texting**, and c) **Excel Roster Keeping**.
- 3. Navigate the RSS Dashboard** to execute date changes, session cancellations, speaker assignments, and retrieve disclosures for your flyers, and file your learning objectives.
- 4. Recommend an efficient Attendance Tracking option** for your department.
- 5. Set-up CloudCME sessions** to allow Self-Claiming, E-Sign-in and Texting.
- 6. Advise your Audience** on Credit-Claiming methods
- 7. Set-up Roster Keeping** templates using your department members.
 - i. “Clean” a session roster in Excel** to match the importable Template columns
 - ii. Import a clean Excel session roster** using the CloudCME Bulk Import tool for Attendance Keeping
 - iii. Download an Excel list** to access the list of your members’ current email addresses
 - iv. Direct learners** how to access their CME transcript

1. Analyze roles and responsibilities for issuing CME credits and Attendance data

1) Nurse planner and/or Physician Faculty submit curriculum via an Activity Planning document

2) CME Office makes available the credit types for which the Activity qualifies, based on the submission of curriculum

3) Audience members self-claim their CME/CE credit during the Activity session

4) Activity coordinator (CME Field Agent) records attendance for any non-self-claimers, after the Activity

5) Audience member accesses their academic transcript via: CloudCME self-service or from their dept's CME Field agent, or Winthrop Medical Staff Services Office(MSSO)

Pop-Quiz A: Roles and Responsibilities

(5 points)

Indicate your responses in the quiz pop-up

- 1) Who is responsible for **determining the CME audience and their learning needs?**
- 2) Who is responsible for **making available the credit types for which the activity or session qualifies?**
- 3) Who is responsible for **marking attendance DURING the CME session?**
- 4) Who is responsible for **marking missing or incomplete attendance, AFTER the CME session?**
- 5) Who is responsible for **accessing academic CME/CE transcripts?**

2. Differentiate among four options for Attendance Tracking in CME

- a) In **Self-claiming**, audience logs into CloudCME (using KerberosID) and completes a short attestation form using the ID number of the session
- b) In **Texting**, audience sets up their CloudCME profile to receive texts from their own cell-phone number, then texts the ID number of the session

Self-claiming and Texting are both methods of **direct** “E-Sign-In” the audience completes, and need no “middle-man”

In **Roster-Keeping**, the Department Coordinator (or CME Field Agent) is **responsible for gathering attendance** via a paper-sign-in sheet, webinar log-in list, or from emails received from the audience members; **and must record this information electronically** into CloudCME either:

- c) via **hand-marking**, or
- d) via **bulk importing**.

Roster-keeping methods are **indirect** attendance records; CME compliance for roster-keeping is **incomplete** until the data arrives in CloudCME. (Examples of incomplete data: Scans, PDF's, paper folders)

Pop-Quiz B: Differentiate the methods and what they require (5 points)

Indicate your responses in the quiz pop-up

- 1) **Which two ways are considered Direct methods** (needing no middleman) of E-sign-In that learners can use?
- 2) **What must the learner's member profile contain** before Texting attendance will work for them during the session?
- 3) **What devices** can a learner use for E-Sign-In during a session?
- 4) **What two methods** are used for marking missing or incomplete attendance, AFTER the CME session?
- 5) **What item do all E-sign-In methods require** that the coordinator provide during the session?

3. Attendance-Keeping: A Closer Look

Method	Who can use it	Ease of use for audience	What your Dept needs to set it up	Set up by your Dept.	User gets support...
E-Sign-In (3 ways)	<ul style="list-style-type: none"> Any mobile device user 		<ul style="list-style-type: none"> Session ID number* 	Easy	By emailing their dept's CME Field agent
1) Self-Claiming by web browser	<ul style="list-style-type: none"> Smart phone with web browser (optional camera) and internet connection KerberosID or email sign-in 	< 1 minute	<ul style="list-style-type: none"> Slides must display QR code* + Session ID number* 	Very Easy <5 minutes	
2) Cloud-CME mobile app	<ul style="list-style-type: none"> Users who download the Cloud-CME mobile app to their smartphone 	5 minutes setup + 1 min per session	<ul style="list-style-type: none"> Slides must display QR code* + Session ID number 	Very Easy <5 minutes	
3) Texting	<ul style="list-style-type: none"> SMS-texting phone and cell signal Must prep their profile to list cell phone nbr. 	< 5 minutes	<ul style="list-style-type: none"> Session ID number* Dept must also distribute "how-to" materials 	Moderate <5 minutes	
Roster-Keeping via Excel	<ul style="list-style-type: none"> Anyone Roster Keeping is needed only for those learners who do NOT Use an above method of E-sign 	<30 sec	<ul style="list-style-type: none"> A list of who attended (signed list or webinar list) 	Difficult >15 minutes	

- The Session ID and QR code **change for for each session daily!** Find them on the RSS Dashboard

4. Set-up CloudCME sessions to allow Self-Claiming, E-Sign-in and Texting

- ▶ **Benefit:** When E-Sign-In is set up in advance of your session,
- ▶ the work of attendance keeping for you, the CME Field Agent or CME coordinator....
- ▶ ...Is greatly **reduced!**

Pop-Quiz C: Setting up E-Sign-in For your CME Series (6 points)

Indicate your responses in the quiz pop-up

- 1) Where can a CME Field Agent **find a session's QR code and Session ID number**?
- 2) Which E-Sign-In method **does NOT use a scannable QR code**?
- 3) Which attendance method is the **most time-consuming** for departmental staff AFTER the session?
- 4) What do **all** E-sign-In methods **require the coordinator provide to the learners**?
- 5) Which method of sign-in **delays the learner's academic credit** after the session for an unknown time period?
- 6) Which method of E-Sign-in **requires NO internet connection**?

Pre-Task: Introducing the RSS Dashboard (1 point)

1. **Sign Into [Winthrop.Cloud-CME.com](https://winthrop.cloud-cme.com)**
 - ▶ Use your **Kerberos ID** to log in
2. **Enter** Administration Mode
3. **Navigate** to the Activities Menu
4. **Select** RSS Dashboard.
 - ▶ The RSS Dashboard is a one-stop for most of your session compliance tasks.
4. **Download** the [RSS Dashboard Job Aid](https://bit.ly/2TD2QNM)
<https://bit.ly/2TD2QNM>
 - ▶ Refer to it to understand the tools available here, before you attempt pop quiz #D

RSS Dashboard Quick Intro

- ▶ **Watch a brief video to see how each tool works**

Pop-Quiz D: Recognizing the tools on the RSS Dashboard (7 points)

Refer to the ["RSS Dashboard Job Aid"](#) you downloaded.

Indicate your responses in the quiz pop-up

- 1) Which **setting of the status filter in the RSS dashboard** allows you to simultaneously view sessions that have a status of "Incomplete" and "Pending" and "In Review" and "Rejected"?
- 2) When the red stop-sign icon appears for a session in the RSS dashboard, **what missing element** does this indicate? 
- 3) What **status** indicates that faculty and disclosures have not been assigned yet?
- 4) What **status** appears for a session when faculty have completed a disclosure, AND declared a financial relationship, AND the faculty member's presentation has been uploaded?
- 5) What **form is automatically emailed** to a Peer Reviewer when the faculty member's slides and their disclosure with financial relationship trigger the status in question 4 above?
- 6) What **status** represents faculty who have completed a disclosure and there was no financial relationship declared?
- 7) Which **icon** in the RSS dashboard can be used to email a faculty regarding actions they need to take?



Great Job!

Now let's put your knowledge to work, and do some hands-on tasks together....

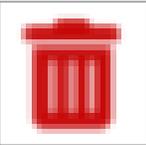
Task 1: Locate a session's child ID or activity ID (1 point)

- ▶ **You are asked to find the session ID for A Founding Father's Grand Rounds session.**
- 1. Navigate to the **Administration area** of CloudCME. Then under the **Activities menu**, locate the RSS Dashboard.
- 2. Using RSS Dashboard, **Search** for the Founding Fathers Grand Rounds (Hint: use search code **FFGR0704**).
- 3. Above the grid, **change the Status** control to "All" (Defaulted to "Pending", it may show no events).
- 4. Set the date controls to **7-1-2020** and **7-31-2021**.
- 5. In the results grid, you will **see many sessions** of the FFGR series. Refer to the session #1 that **contains your name**.
- 6. **Locate the child session ID** for Founding Fathers Grand Rounds that includes [your name]#1.
- 7. **Type that number into your quiz response pop-up** and submit.
- ▶ Note: multiple sessions have been supplied with your name, in case you reattempt this scored module.

Task 2: In the RSS Dashboard, update session dates to reflect rescheduling (3 points)

- ▶ **The Awesomeness in Primary Care Grand Rounds in which you are speaking will be moved to tomorrow.**
- 1. Using the RSS Dashboard, **find** the Awesomeness Grand Rounds session that features you as a speaker (there are several sessions assigned to you to allow multiple attempts at passing this task. Start with the one labelled with your name and #1)
- 2. **Choose one of these sessions(#1), and type** its session ID into your quiz response pop-up, then submit
- 3. **Use the calendar control**  to modify the session. You will see a popup calendar window. Double click the event, then “Edit only this occurrence.” and “OK”.
- 4. Use the **options button** to change both the **start date** and **end date** of this session to **tomorrow’s date**. Then close both popup windows.

Task 3: In RSS Dashboard, deactivate two sessions to reflect cancellation(8 points)

- ▶ In this task **you will cancel two sessions** of a dummy series “Sessions to be Cancelled as a CMEFA Skills Exercise”.
- 1. In the **RSS dashboard**, search for the code **CXLG** to **locate the sessions on which you will practice cancelling**. Set the **date range** to 7/1/2020 to 3/1/2021. Set the **Status** filter to “All”. In the column heading filter for **Topic** type **your last name** and set its **funnel** tool to “Contains”.
- 2. You should see approximately six “**SESSIONS TO BE CANCELLED...**” sessions that include **your name** in the topic. We provided you with many sessions, to allow you multiple attempts at this task. **Locate the sessions with your name** that are numbered #1 and #2.
- 3. **Enter those two Session ID’s into your quiz response pop-up, then submit them**
- 4. For the first session number you submitted above, **tap the red trash can icon, to deactivate it.** 
- ▶ **DO NOT deactivate the PARENT activity ID #18996.** *Deactivating the parent will delete all its child sessions and prevent you from finishing this task!*
- 5. **Log a written explanation for the deactivation reason** as requested, such as “Session will not be held”.
- 6. Repeat the **deactivation and reason step** for the 2nd Session ID you identified above.

Task 4: Assign a Faculty in RSS (3 points)

1. Using RSS Dashboard, **search for** the CMEFA-HOW Self-Paced Training Sessions with **your name listed in the topic title**. (You will find several of these sessions, to permit you several attempts at this task if needed.)
 2. Use the Calendar icon  to **change the date of #1 of these sessions to today's date**.
 3. **Assign** Peter Sandre as an Instructor to #1 of your "Self-Paced Training" sessions that reflect your name in the topic.
 4. Make a note of **the child session ID** and enter it into your quiz response pop-up, then submit.
- **Keep this child session ID in mind:** You will continue working with this session for the next five tasks.

Task 5: Using the RSS dashboard, **Add a 2nd speaker to session** (6 points)

1. Using RSS Dashboard, locate **the same Session ID*** that you worked on in the previous task
2. Click on the “**Add a New Faculty Member**” link, to open the pop-up for adding speakers to the session.
3. **In the top left search box** of the pop-up, type “Task-[YourLastName]”, to select the dummy speaker name assigned to you for this task.
4. Use the **Add Faculty button** to attach this speaker to the session grid.
5. **Close the pop-up** and **verify that the speaker appears** as Faculty on your session ID in the grid of the RSS Dashboard.
6. Note that the speaker has a **relationship listed in the disclosure column**. You will need to copy this information for use in the in task #7.

*Session features your name in the topic.

Task 6: Using the RSS dashboard, generate a session flyer (3 points)

1. Download the learning objectives slide here. <https://bit.ly/36N1pF8>
2. Using RSS Dashboard, open the Topic link and **paste in three Learning Objectives** from the download.
3. Open the flyer icon  to **generate a session flyer** for the same session ID you worked on in the previous task.*
4. Preview the flyer to **verify that it includes both instructor names** you added in the previous steps and their disclosures.
5. **Download** the flyer. **Email** the flyer to yourself, and also CC: to WinthropCME@nyulangone.org

*Session features your name in the topic.

Task 7: Using the RSS dashboard, edit and upload speaker slides (8 points)

1. In RSS dashboard, **locate the same Session ID*** that you worked on in the previous task.
2. **Copy** the speaker name and disclosures.
3. **Download** the speaker slides from this link:
▶ <https://bit.ly/2HV1sU1>
4. **Download the Disclosure Slide** template
▶ <https://bit.ly/3oFVozK>
5. **Update** the Disclosure slide to include the **speaker name** and **disclosures** you copied.
6. **Save the revised slides** by using Save As and add the word “Disclosures” to the filename.
7. Using the RSS dashboard, **upload** the modified slides to the current “Self-Paced Training” session (that features your name in the session topic), by **associating it the instructor listed there**.

*Session features your name in the topic.

Task 8: Using the RSS dashboard, edit and upload session slides (11 points)

1. Using the RSS dashboard, **find the same Session ID that you worked on in the previous task.**
2. Return to the current self-Paced Training session in the RSS Dashboard, and **download the single scan QR code** from the link for that session.
- ▶ **Download the E-Sign-In slides:** <https://bit.ly/2J4WWTA>
3. **Insert** the QR code and Session child ID into the E-sign-in slides. Also, **change the email address** on the slide to your own email address, and **list the cutoff time** for E-sign-in as 30 minutes after the session ends
4. **Next, Insert the e-sign-in slides** into the front of the speaker's presentation slides. Your slides should now contain: **a) E-sign in slides, b) disclosure slide, and c) speaker slides**, in that order.
5. **Save the revised slides** by using Save As and add the word "Revised" to the the filename.
6. Using the RSS dashboard, go to the same session ID* you worked on in the previous tasks
7. **Upload** your revised slides by associating it the instructor listed in the Dashboard.

*Session features your name in the topic.

Task 9: E-Sign-in yourself via texting (6 points)

1. Using Membership Manager, **search for your email address**.
2. Then **enter** your cell phone number into your Membership profile and **save**.
3. **Return to the RSS Dashboard and locate the child session ID*** you worked with during the last 5 tasks.
4. **Use the Calendar Icon to change the session date to today's date.** Change the start and end **times** to the current hour. (E.g. If it is now 11:15AM, enter 11:00 as the start time and 12:00 as the end time.)
5. Now claim credit for the session using E-sign-in texting. **Using your cell phone, Text the session ID number** to the credit claiming phone number **(516) 500-8086**, to claim credit for today's same Session ID that you worked on in the previous tasks.
6. **Watch for texts** you receive back from CloudCME.
7. If you do not have a texting-enabled cell phone, or if texting your attendance fails, please **use your smart-phone or computer browser to complete the Credit Claim form instead**, at: <https://bit.ly/2TE67wm>
8. In the Credit Claim Form, input **the same session ID*** you have been working with on the last few tasks. The session which features your name in the topic.

*Session features your name in the topic.

Task 10: Retrieve a comprehensive credit transcript for a member(3 points)

1. Using Membership Manager, **locate** your own profile by searching for your name
2. **Go to the Credits & Transcripts tab to View** your transcript
3. **Email the transcript** to your email address
4. **Email the transcript again** to RAMartin@winthrop.org

Task 11: Add new attendees to an activity roster via the “bulk import” method, and award them credit automatically (2 points)

- ▶ A group of new Fellows arrived on campus and will attend the Founding Father's Grand Rounds sessions.
- 1. **Download roster F containing their names**
- ▶ <https://bit.ly/34ScrGM>
- 2. Navigate to the **Record Attendance** screen (in the Activities tab)
- 3. Use the **Search box** to locate the same session of Founding Father's Grand Rounds with your name on it, **whose Session ID you retrieved in Task 1.**
- 4. **Upload** the roster F you downloaded in Step 1 into the **Founding Father's Grand Rounds [your name]**, awarding them CME Credit.

Task 12: Use “Record Attendance” screen to manually mark attendance credit (2 point)

- ▶ On July 4, 2020, you attended Founding Fathers Grand Rounds, but did not correctly self-claim your own CMEFA type credit.
- 1. Use the Record Attendance screen to find the FFGR session that occurred on July 4, 2020.
- 2. Use the Record Attendance screen to **manually** award yourself the **CME Field Agent Training** credit.
- 3. *(do not use “bulk-import” for this task)*

Task 13: Correct a missing email address before importing attendance (4 points)

1. **Download template D file** to your computer's Downloads folder, then open it.
▶ <https://bit.ly/3oWCncf>
2. **Notice** that Martha Washington's email address is missing in this roster. This will cause an error when you bulk import the sheet.
3. In Membership Manager, **lookup** Martha's email address in and **add** it to your roster
4. **Award CMEFATA credit** to Martha by adding CECreditCategoryID **54**, to her line on the Excel roster. Save the excel roster to a location on your desktop.
5. Go to the Record Attendance screen and **search for same session ID*** you worked on in the previous **Tasks 4 through 8**.
6. In the Record Attendance screen, use the **bulk import tool to import the roster** sheet you edited in this Task.

(*Session features your name in the topic)

Task 14: Award a specific credit type when hand-marking attendance (1 point)

- ▶ Martha Washington attended your current "Self-Paced Training" session but did not receive Nursing Credit.
- 1. Using the Record Attendance screen and the same session ID* from Task 13, **award a manual credit** for ANCC Contact hours to Martha for today's session.

(*Session features your name in the topic)

Task 15: Use Record Attendance to perform a "bulk import" (4 points)

a. **Download the list of nurses, template C file**

▶ <https://bit.ly/3oPISxL>

▶ **Notice** that on the current roster, several nurses have misspelled or invalid emails.

b. **Correct the spelling** of these emails.

c. **Code these lines** for ANCC type credit (CE Credit CategoryID should be 6).

d. Use the Record Attendance screen and the same session ID* from Task 14, to **bulk import** this roster.

e. If any fields are flagged red during import, **re-edit the excel sheet to address the error details flagged**, and re-attempt your import.

(*Session features your name in the topic)

Task 16: Correct the excel template headers before import, Part A (3 points)

1. Download the template A file

▶ <https://bit.ly/325xLH9>

▶ **Notice that the incorrect column names are used.** This will cause an error when you bulk import the roster.

2. **Rename the columns** using the exact column names listed here: **FirstName, LastName, CECreditCategoryID, Degree, Email**

3. Use the Record Attendance screen and the same session ID* from Task 15, **bulk import** these attendee credits into the current “Self-Paced Training” session (which features your name in the session topic).

(*Session features your name in the topic)

Task 17: Correct the excel template headers before import, Part B (3 points)

1. Download the template B file

▶ <https://bit.ly/2l1j54J>

▶ **Notice that the roster contains unnecessary EXTRA columns.** This will cause an error when you bulk import the roster.

2. **Delete the unneeded** columns, keeping only these: **FirstName, LastName, CECreditCategoryID, Degree, Email**

3. **In the Record Attendance** screen for the same session ID* in task 16, **Bulk import** this roster

(*Session features your name in the topic)

Task 18: Download a list of the members of a series (5 points)

- 1. In the Record Attendance** screen for the same session ID* in task 17, **locate the Export XLS button** in the top of the grid.
- 2. Click Export XLS button** to Download this list of names who are members of the series.
- 3. Compare** the columns inside this download list. with the columns you would use for a bulk import roster (FirstName, LastName, Degree, CECreditCategoryID and Email).
- 4. Which column letters would you need to keep** in the Excel sheet you downloaded, to convert it into a properly Formatted Bulk Import Roster? **Type your answers into your quiz response pop-up, (use commas between column letters).**

Task 19: Retrieve a member transcript for a specific date range (6 points)

1. **Using Membership Manager, locate** Martha Washington's profile by searching on her name.
2. **Go to the Credits & Transcript tab**
3. **Filter the transcript** to include the dates of July 1, 2017 through today.
4. Use the **Email Transcript** button to Email the transcript to Martha Washington.
5. **Email the Transcript again**, but this time send it to your own email.

Task 20: You're Almost Done!

Bookmark your templates, submit for scoring, and complete the Evaluation (5 points)

- ▶ **For 2021, you will discontinue using most templates** stored on the F:/ drive, as these are no longer compliant with our current physician and nursing accreditations.
- ▶ Many CME templates are now built into CloudCME, but **some templates are downloadable from the Tools page on CloudCME** (such as the Disclosure slide and E-Sign-In Slides you used in Tasks 7 & 8).
 1. Please open Winthrop.Cloud-CME.com and **navigate to the Tools page**. Bookmark the Tools page.
 2. Then copy the page link & paste it into your quiz response pop-up, then submit:
- ▶ Your work on this Scored CloudCME Skills Module **requires 100% for passing**, and is **graded by CME office**, within 48-72 hours after you submit it.
 1. **If you do not wish to submit this attempt**, return to the beginning and re-attempt it **up to 2 more times**. We'll only score attempts you request. If you have attempted twice unsuccessfully, [request coaching here](#).
 2. **To submit the 20 Tasks you completed today for scoring**, please complete the Attestation/Scoring request [HERE](#).
<https://bit.ly/2HPRvaL>

[End of the module]

Thank you!

Please complete the course evaluation after you conclude your use of this module.

- ▶ **Sign In for Course Evaluation:** <https://bit.ly/3n37ZLG>
- ▶ **To report technical difficulties:** <https://bit.ly/2HPRvaL>

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