RSS Dashboard

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CloudCME® offers the RSS Dashboard to easily managing individual RSS sessions or children, as they are often referred to. In the RSS Dashboard, you can enter the child activity title, description, location, objectives, specialties, assign faculty, manage faculty disclosures, and upload activity related documents. Additionally, you can generate an activity handout.

Click on the article sections below for more information:

NOTE: An Administrator **must** assign permission to your account via **Administration > User Screen Access** in order for you to view this screen. If you do not have access to the RSS Dashboard, please contact your Administrator.

RSS Benefits

- All activity information is on one screen
- Verify that upcoming RSS activities have all documentation in place
- Add faculty to the RSS and auto-assign a disclosure without navigating to faculty management
- Begin Conflict of Interest Resolution process, if needed

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October Release Notes

Faculty Presentation COI Resolution

- Begin Conflict of Interest Resolution process, if needed
- Generate a flyer of the activity and export to PDF/Word.
- Email coordinators or faculty
- Approve the activity

From the main menu, go to **Activities > RSS Dashboard**.

RSS Icons

The following icons display in the columns of the RSS Dashboard: Status, ID, Topic, QR, Faculty, Upload Presentation, Disclosure and Notes (Activity Administrators only). Below is the purpose of each icon.

Status column - As the planning process continues through the approval state, this icon will continue to update.

NOTE: Please refer to the RSS Status Definitions below for a description of each status meaning.

Topic column

RSS Flyer - Click this icon, and the system will generate an RSS activity flyer for distribution. Faculty must be assigned to the activity before a flyer can be generated. You can customize the flyer template for a unique RSS child activity or customize for an RSS parent activity, which can be applied to all child activities of the parent. See below for instructions.

Calendar - Click this icon, and the calendar will display for you to view and access the scheduled RSS child activities.

Trash - Click this icon to deactivate/delete an RSS child activity. A message will display asking you to explain the reason why you are deleting the RSS child activity. Enter text and click **Add Note**. This note will be emailed to the Continuing Professional Development (CPD) office on file in your organization.

QR Column

This QR code can be scanned by users logged in to the CloudCME® mobile app. This QR code *cannot* be scanned by users with the following roles in Membership Manager: Administrators, Activity Manager, CME Coordinator. Users with these specific roles will need to use the QR code generated in the Registration report.

Single Scan QR

Faculty column

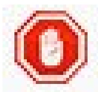
Once you have selected the faculty member from the drop-down list, click the green plus icon to add the user as a faculty member for the RSS child activity.

Once a user has been added as a faculty member, two additional icons display.

Envelope - Click this icon and a window will display for you to create an email message for faculty members. You can email both coordinators and faculty. When an email is sent, the system will record this action and place a note in the Notes section.

Red Minus - Click this icon to remove a faculty member from the RSS child activity.

Disclosure - This icon will display if the faculty member has not completed their disclosure form**.**



Upload Presentation - An icon displays in this column when one or more faculty have disclosed a financial relationship in the disclosure form. This icon signals to upload the faculty member's presentation so that the peer review process can begin.

Notes - There is a green plus sign icon located in this column. Click this icon to add notes to the RSS child activity.

RSS Status Definitions

Incomplete: This status means that faculty and disclosures have not been assigned yet. RSS Coordinators/Owners will see Incomplete by default until faculty have been assigned, and disclosures have been completed. This is the initial default status of every RSS child activity.

Pending: This status represents faculty who have completed a disclosure and there was no financial relationship declared (i.e. no financial relationships were disclosed or COI was resolved).

In Review: This status represents faculty who have a completed disclosure and at least one financial relationship has been declared. The faculty member’s presentation has been uploaded, triggering a formal review for potential conflict of interest to determine if resolution is needed.

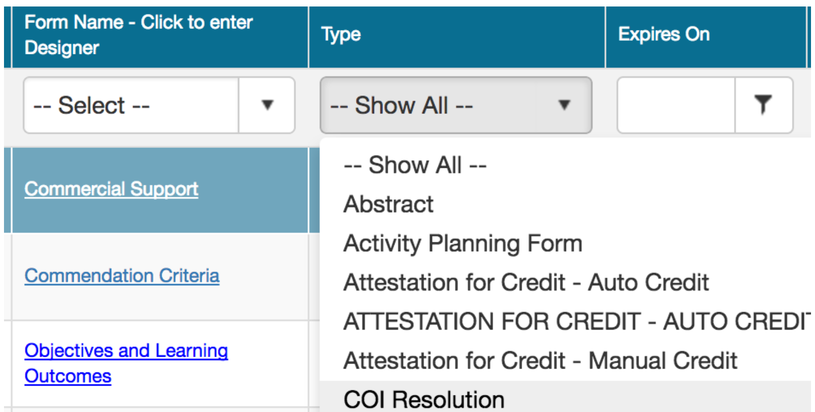
Approved: This represents faculty who have completed a disclosure, either no financial relationships were declared or, if identified, resolution of conflict of interest has been satisfactorily completed.

Rejected: This represents faculty who have completed a disclosure, a financial relationship has been declared and the conflict of interest is not able to be satisfactorily resolved. The activity is rejected. The coordinator would remove this faculty member and would need to select a new faculty member and begin the process again.

NOTE: The system will send an email to the administration email on record when the RSS status changes to Pending **if** in **Administration > Preferences** the checkbox "Send email every time an RSS status is pending in the dashboard" is selected.

COI Resolution Form

In Forms, the "COI Resolution" form is triggered when a faculty member has declared at least one financial relationship, and the faculty member's presentation has been uploaded for review. An email will be sent to the user that has been assigned the Peer Reviewer role for the activity. This form is automatically assigned to all activities.



Peer Reviewer (PR)

The role of Peer Reviewer can be assigned through the Activity Roles tab in Activity Manager or through Membership Manager.

If a user has been assigned the role of Peer Reviewer in Activity Manager, the user will be the Peer Reviewer for that *specific activity*.

If the Peer Reviewer role is ***not*** assigned through the Activity Roles tab in Activity Manager, then *all* users who are assigned the role of Peer Reviewer in Membership Manager will receive an email to complete the Peer Review process. **Therefore, it is a best practice to assign Peer Reviewers *in the specific activity***.

NOTE: When a presentation is uploaded to an RSS activity, the peer review process will begin. This is the case for *approved* and *unapproved* RSS activities. RSS Case Conferences will bypass the peer review process.

Specific criteria need to be met for the Peer Review email to be sent, depending on the type of activity.

For RSS activities:

- The faculty member must have *at least one* financial relationship declared on their Disclosure of Financial Relationships form.
- A peer reviewer must be specified for the activity on the Activity Roles tab in Activity Manager.
- Either the coordinator or the faculty member should upload the faculty member’s presentation, then the Peer Review email is sent to the activity-assigned peer reviewer.

Activity - Peer Reviewer (Best Practice)

You can assign Peer Reviewer(s) to an activity so they can review the activity content. Peer reviewers will have access to the activities which they have been assigned. When presentations are uploaded for an activity, an email will now be sent to users set as peer reviewers in the Activity Roles tab in Activity Manager. If no users are set on the Activity Roles tab, then the email will go out to users with the peer reviewer role in their profile.

NOTE: If a Peer Reviewer has been assigned to a parent Regularly Scheduled Series (RSS) activity prior to creating the children, the Peer Reviewer will be copied down to the RSS children.

1. Go to **Activities > Activity Manager**. Find the specific activity and select the pencil icon to edit.

2. Go to the **Activity Roles** tab and select the **Peer Reviewers** tab. Enter the user's last name in the search box and select from the drop-down list. Then, click **Add**.

mceclip17.png

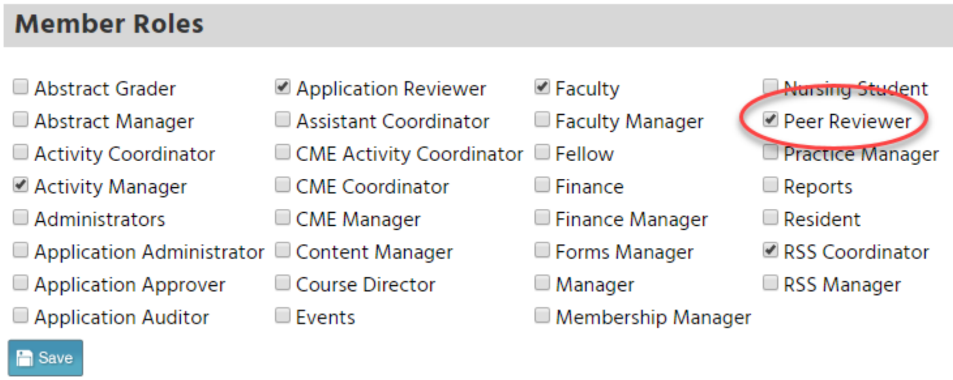
3. The user will display in the table with the Peer Reviewer (PR) role.

mceclip18.png

Membership Role - Peer Reviewer

In order for the system to trigger the peer review process for COI Resolution, you can choose to assign users via Membership Manager the role of Peer Reviewer. The peer review process is triggered when a faculty member has declared at least one financial relationship, and the faculty member’s presentation has been uploaded for review.

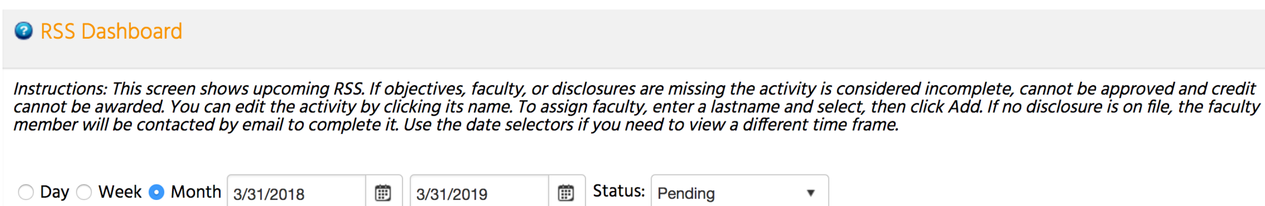
If the Peer Reviewer role is ***not*** assigned through the Activity Roles tab in Activity Manager, then *all* users who are assigned the role of Peer Reviewer in Membership Manager will receive an email to complete the Peer Review process. **Therefore, it is a best practice to assign Peer Reviewers *in the specific activity*.**



RSS Coordinators/Owners

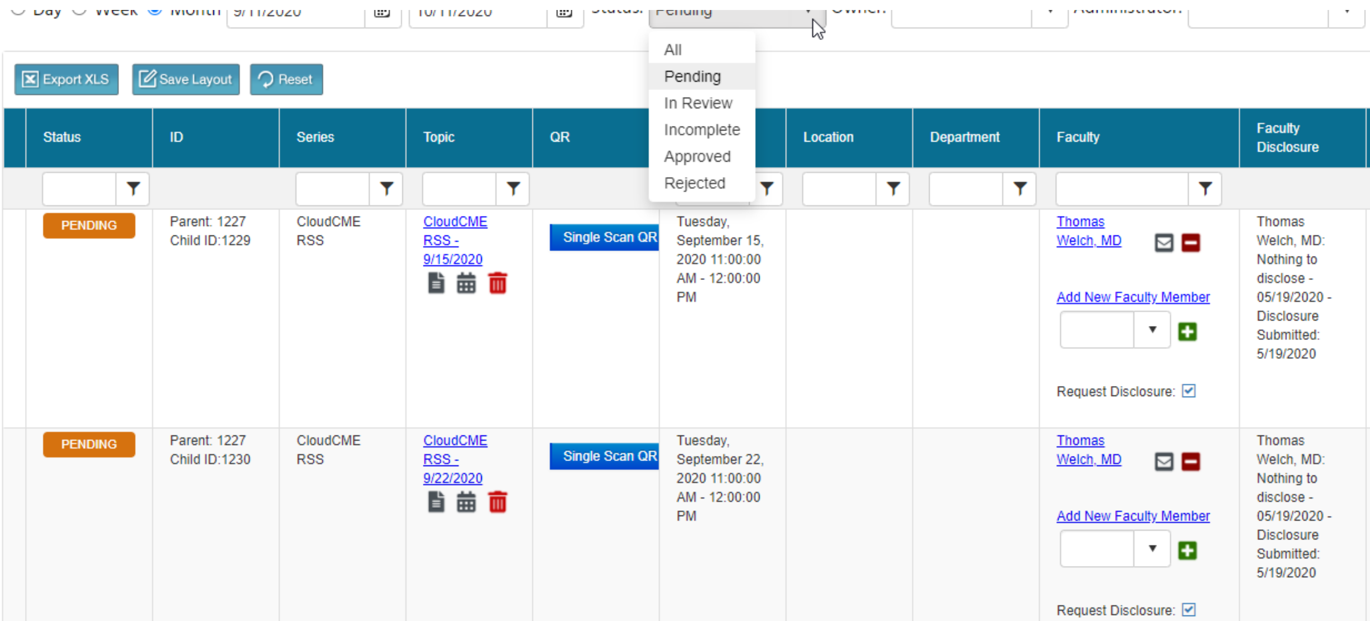
The RSS Dashboard provides a minimized view to easily manage RSS activities. Coordinators/Owners will see all of activities they have been assigned to as coordinator/owner **except** those that are approved, unless Approved is selected in the Status search.

There are a variety of ways to search the RSS Dashboard. You can search by frequency (i.e. day, week or month), date range or status.



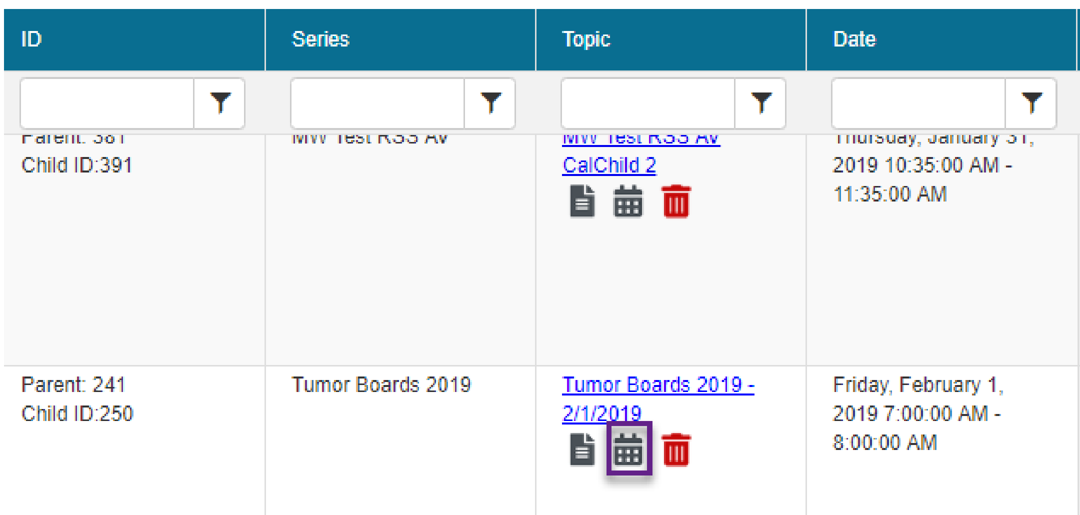
In the below screenshot, the Status is set to PENDING. You can also search by changing the status to All, In Review, Incomplete, Approved or Rejected.

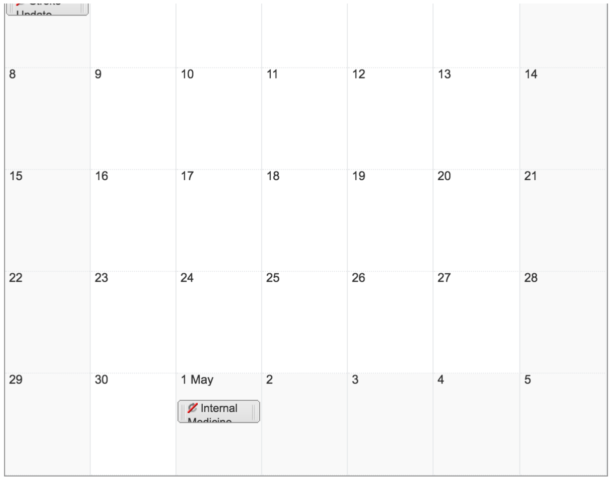
NOTE: Please see the RSS Status Definitions above for a definition of each available status.



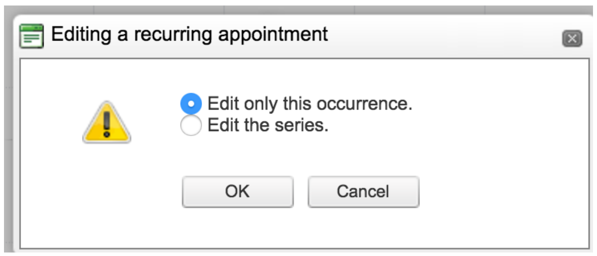
The data table contains several columns to assist the coordinator in managing the activity planning process. Columns include: Status, ID, Series, Topic, QR, Date, Location, Department, Faculty, Faculty Disclosures, Planners, Upload Presentation, Objectives, Audience, Owners/Coordinators, Notes, and Approval.

To begin, click the calendar icon in the **Topic** column and go to the date of the first RSS child activity.



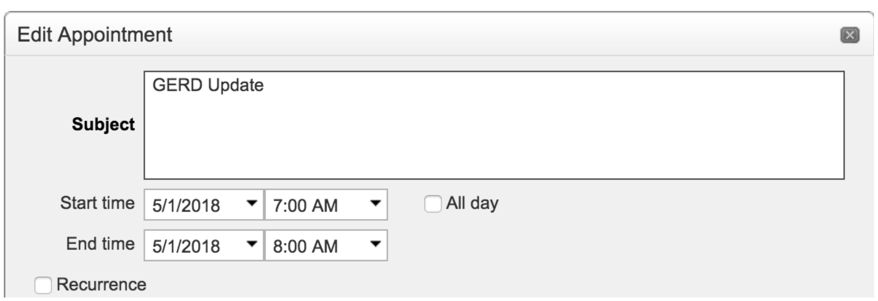


Enter each child session as you plan the topics throughout the year. To edit a child activity, double-click on the child activity in the calendar. The radio button will default to "Edit only this occurrence." Click **OK**.

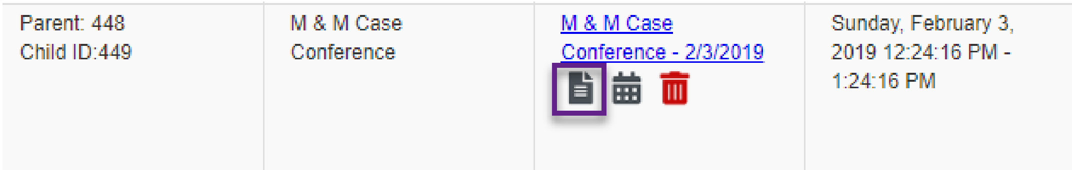


You can edit the title of the child activity. If you need to revise the day or time the activity will occur, click the **Options** button.

A new window will display. You can edit the date and time of the child occurrence and click **Save**.



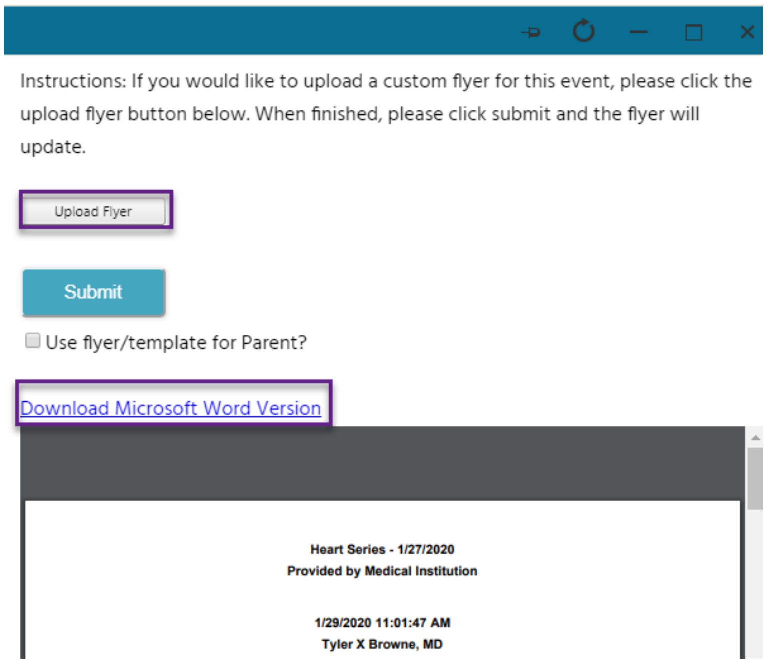
To customize the flyer for an RSS activity, click the **RSS Flyer** icon and the **Download Microsoft Word Version** link. The flyer will open as a Word document on your desktop. Make the desired changes and save the document.



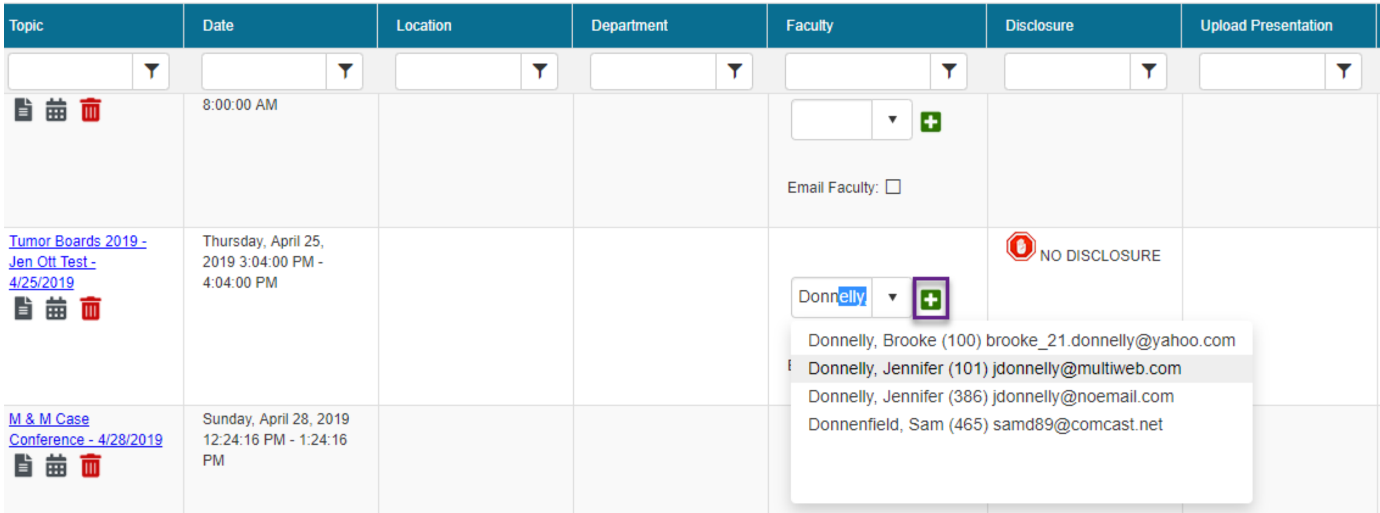
To associate the revised RSS flyer with a unique RSS child activity, click the **Upload Flyer** button, select the revised flyer from your desktop, and click the **Submit** button.

To associate the revised flyer to the RSS parent for use per each child activity of the parent, click the **Upload Flyer** button, select the revised flyer from your desktop, and check the **Use flyer/template for Parent?** checkbox. Then, click the **Submit** button.

NOTE: The RSS flyer will be saved in the **Documents** tab in Activity Manager for the RSS activity.

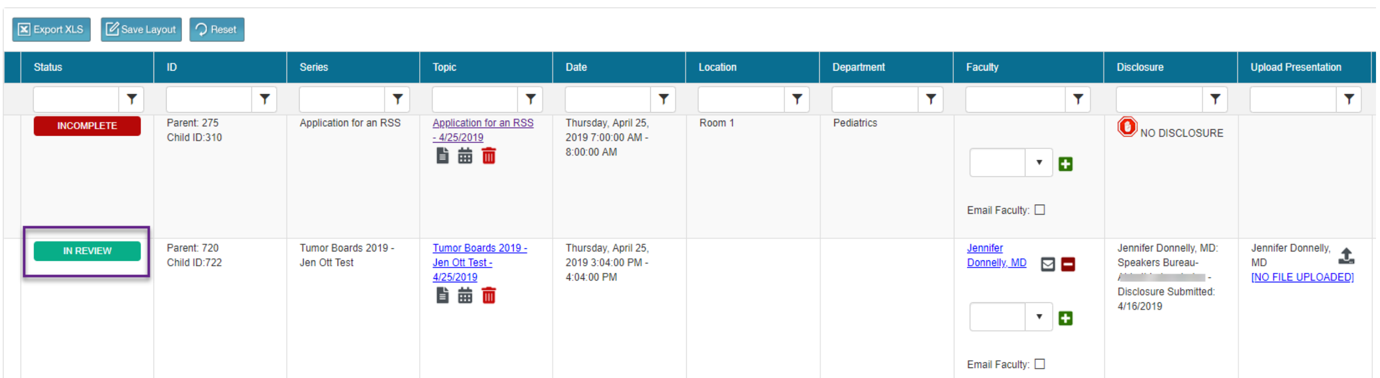


To add faculty to the child activity, go to in the **Faculty** column. Type in faculty member's last name, select from the drop-down list, and click the green + button.

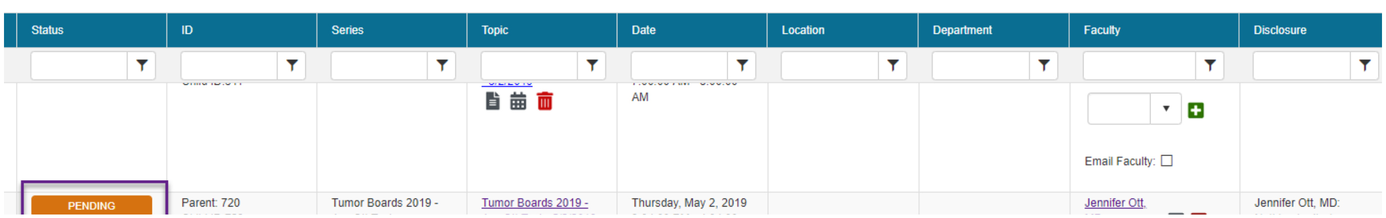


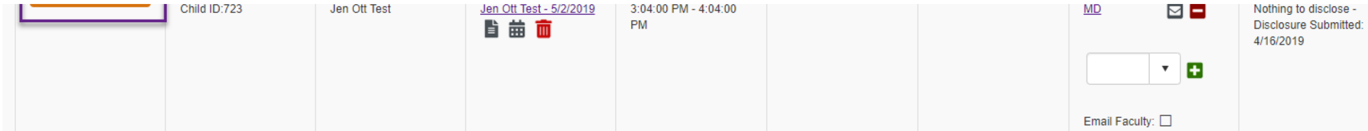
The faculty member will be added to the child activity.

NOTE: You will see that the Status column changed from PENDING to IN REVIEW. The status changed to IN REVIEW because the faculty member declared a financial relationship in their disclosure.

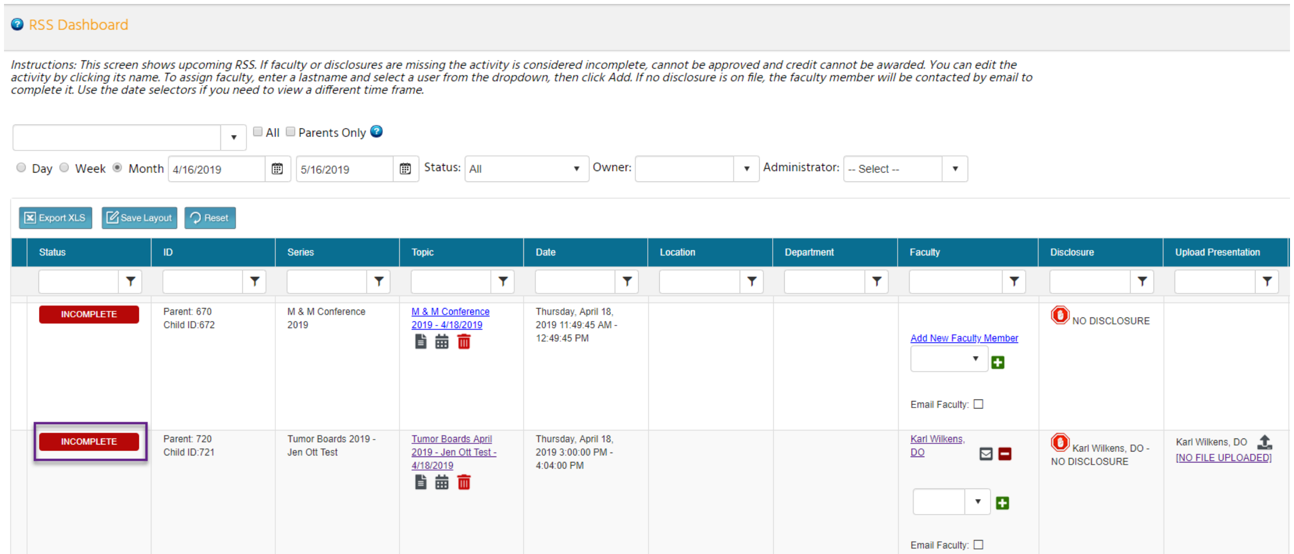


If the faculty member declares that they have no financial relationships disclosed on their disclosure form, the status will update to PENDING. The RSS child activity is ready to be marked as **Approved** by the Activity Administrator and the status changes to COMPLETE.



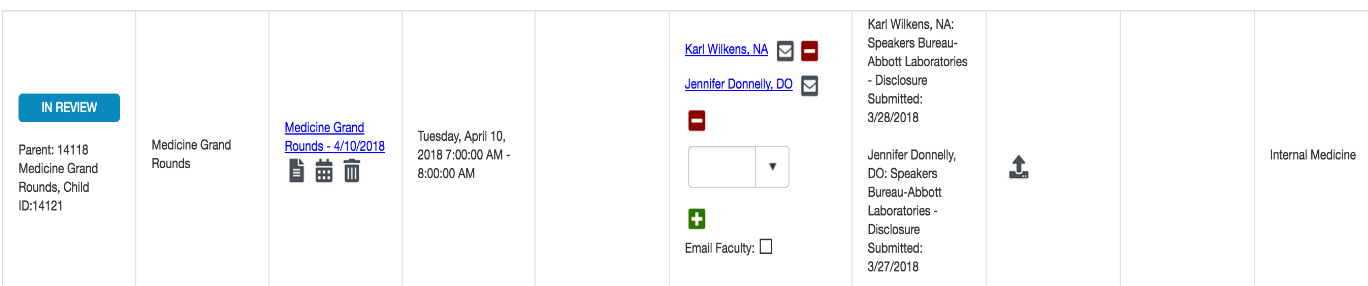


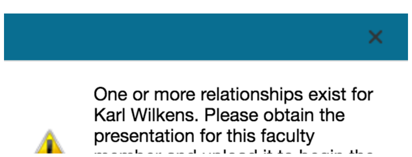
If the faculty member declared a financial relationship(s), this will be noted in the **Disclosure** column and the status will update to INCOMPLETE.

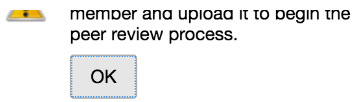


If faculty have one or more disclosed financial relationships, the coordinator is instructed to obtain and upload the presentation (PPTX, PPT or PDF), which then triggers the Conflict of Interest Resolution (COI) process. Additionally, the status changes to IN REVIEW on the RSS Dashboard.

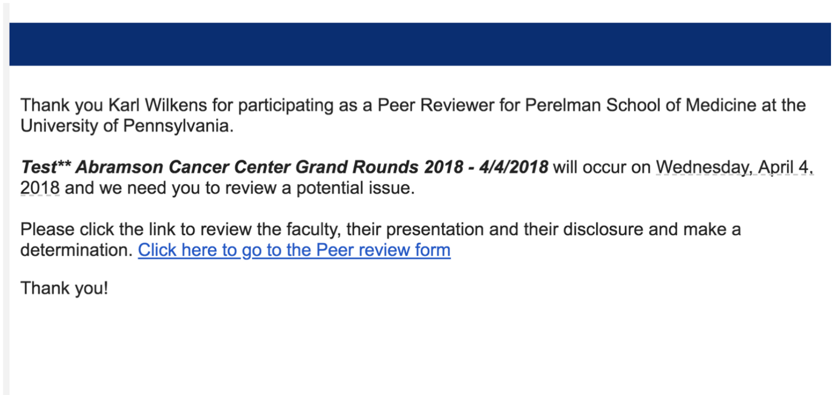
NOTE: Click the upload icon in the **Upload Presentation** column to upload the faculty member's presentation for peer review.







Once the faculty member's presentation has been uploaded, users who have a role of Peer Reviewer, receive an email with a link to the COI Resolution form. The presentation title, faculty name, a link to the uploaded presentation, stated disclosures and resolution questions are included in the form. Based on the question responses, the status will change to REJECTED or PENDING.



Activity Administrators

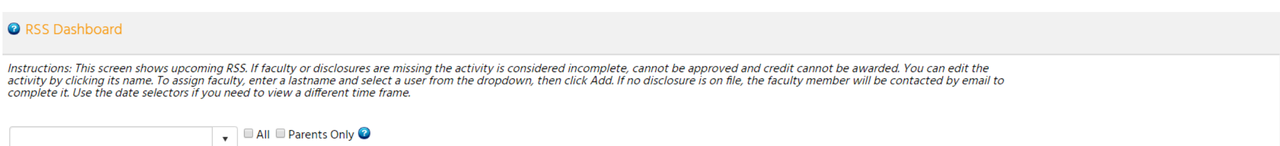
The RSS Dashboard functionality for Activity Administrators has additional functionality, above what is available to Coordinators/Owners. The following is a description of the additional Activity Administrator functionality.

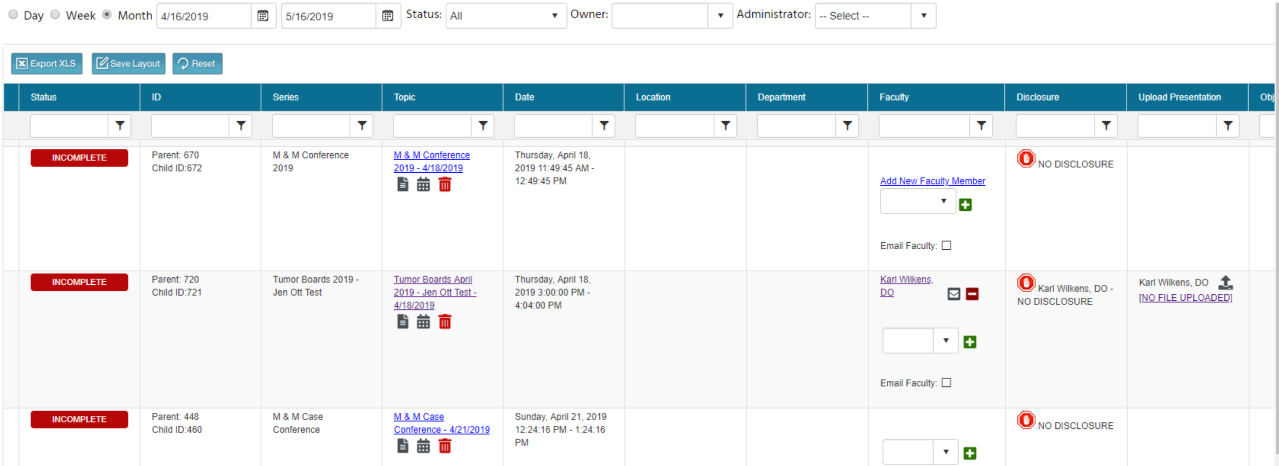
1. Only activities whose status is Pending are available. Pending is the default status. Pending means that faculty have been assigned to the activity, and faculty disclosures have no declared financial relationships or the Conflict of Resolution process has been completed and conflicts have been successfully resolved.

2. A Notes column is available to Activity Administrators. Peer reviewer notes and ad hoc notes can be viewed. For searching purposes, notes are type ‘Application.’

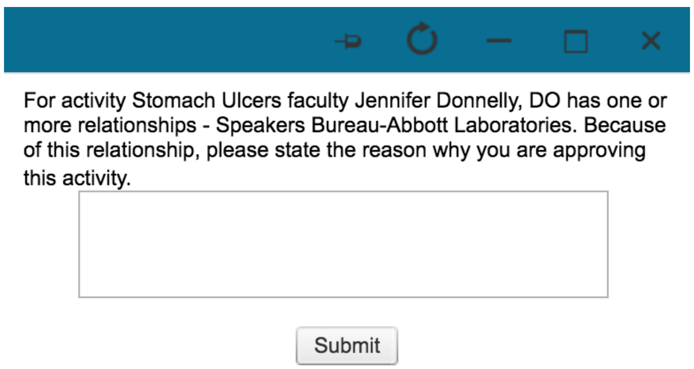
3. Clicking the Approval checkbox changes the activity status to Complete.

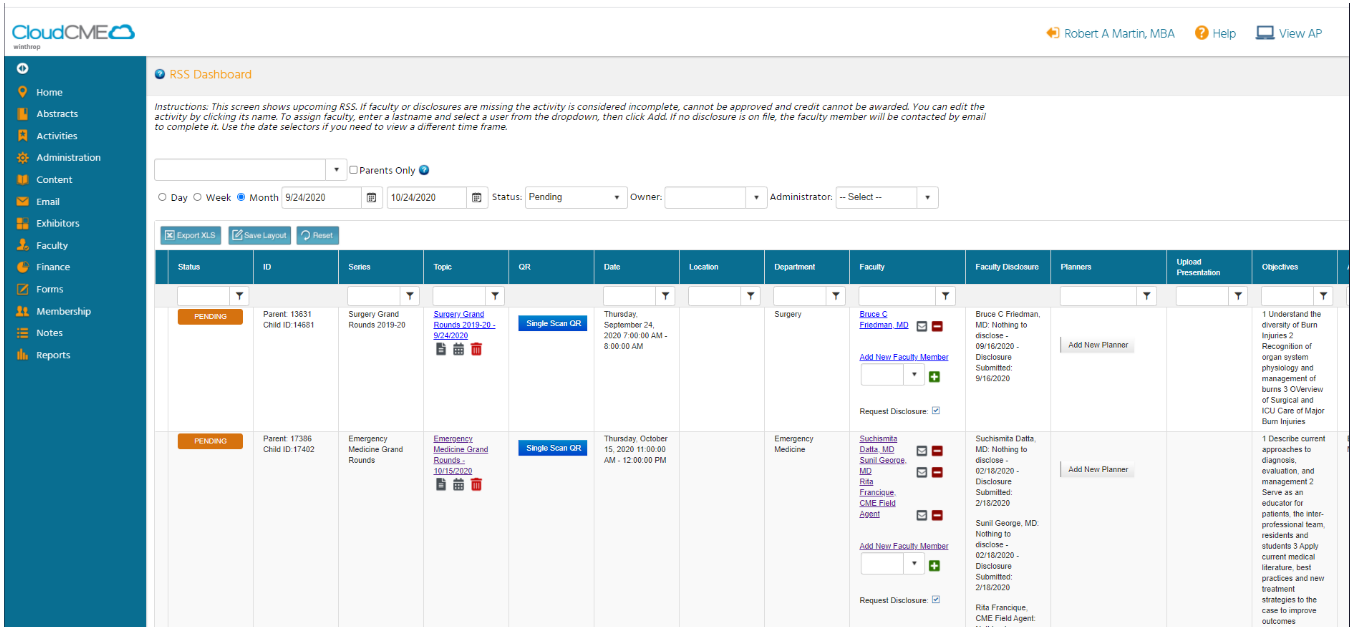
4. All filtering and search tools are available on the data table. You can filter by event, activity status, coordinator/owner and administrator.





5. If a faculty member has a declared financial relationship and COI peer review has successfully been resolved, the system will display a window for you to enter a note stating this process and outcome. This is required in order to approve the activity. If no financial relationship has been reported, you can simply approve the activity and bypass the note requirement.





The RSS Dashboard in CloudCME (depicted here) enforces CME compliance by requiring certain documentation to be present before CME credit can be claimed (including E-sign-in). Sessions that have a status of "In Review", "Pending" or "Incomplete" need your series coordinator (CME Field Agent's) further attention. Only "Approved" sessions are unlocked to permit E-Sign in. **NOTE: All compliance items below must be completed in advance of the session to "unlock" it for E-sign-in.**

_____1. At least one faculty must be designated on the series or session.

_____2. Disclosures must be completed by all speakers listed and the faculty Activity Director (using their MyCME dashboard).

_____3. Once a disclosure is completed, it will be valid for the series for 1 year. If disclosure is more than a year old, your series will fall out of compliance, and E-sign-in will lock out sessions.

_____4. If available, presentation slides should be uploaded into the RSS Dashboard a few days in advance of the session to permit faculty review below.

_____5. ***When commercial relationship exists for either a speaker or course planner/director, this is a conflict***, and then the Conflict of Interest Resolution (COIR) Form must be completed.

- Note: The COIR form must be completed by an **un-conflicted** individual (physician with no commercial relationships). If your Faculty Activity Director has commercial relationships on their Disclosure form, you will need to identify an alternate faculty member within your department who has **no** commercial relationships, who will review speaker slides and complete the Conflict of Interest Resolution form. This form requires the reviewing faculty member to review the speaker's slides for when reviewing. **You must have slides uploaded for COIR to be completed.**

_____6. Once the COIR form is complete, please upload it into your series' Activity Manager Documents tab, and alert the CME office of the session ID to can mark your session as Approved on compliance status. **This will unlock E-sign-in for that the session date**.

More information

- **View the RSS Dashboard for your series here:**
    - https://winthrop.cloud-cme.com/admin/Events/RSSStatus.aspx#
    - (search for series by code or by owner name).
    - You can use tools on the RSS Dashboard to email the speakers about missing compliance documents such as disclosures and slides for your Faculty Director to review.
- For further information on using the RSS Dashboard of CloudCME, please see the official vendor documentation

https://cloudcme.zendesk.com/hc/en-us/articles/360000887212-RSS-Dashboard