

## Record Attendance

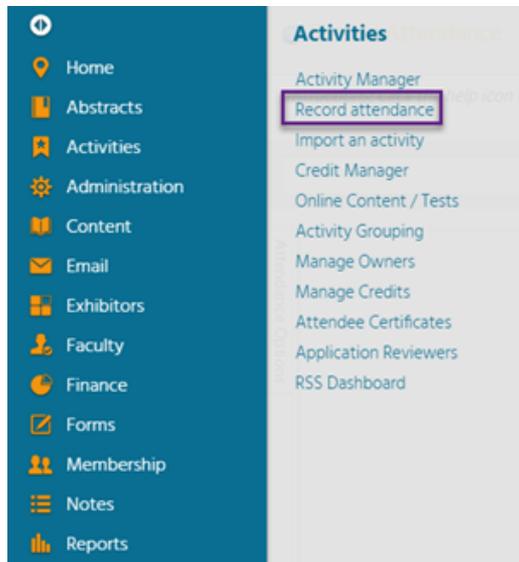
### Jennifer Ott

Created on: April 09, 2013 12:05  
Last Updated on: Tuesday at 09:23

### Overview

Attendance can be recorded using the **Activities > Record Attendance** screen for users with access to this screen. Before recording attendance, it is best to understand each part of the screen and its functions.

From the main menu, go to **Activities > Record Attendance**.



Click on any section of this article for further instructions:

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## Attendance Options

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## Attendance Options

To begin, enter the activity name in the search box and select it from the drop-down list.

The screenshot shows the 'Record Attendance' interface. At the top, there is a header 'Record Attendance' with a help icon. Below the header, there is an instruction: 'Instructions: Click the help icon for detailed instructions on the use of this screen.' The main area contains a search box with the text 'Update on D' and a dropdown arrow. To the right of the search box are two checkboxes: 'All' and 'Parents Only', with a help icon next to 'Parents Only'. Below the search box, a dropdown list is open, showing several activity options: 'Update on Diabetes - 654321', 'Update on Diabetes - -1-2', 'Update on Diabetes - 1/25/2019 - 406-405', 'Update on Diabetes - 2/8/2019 - 408-405', 'Update on Diabetes - 2/22/2019 - 410-405', 'Update on Diabetes - 3/8/2019 - 412-405', 'Update on Diabetes - 3/22/2019 - 414-405', and 'Update on Diabetes - 4/5/2019 - 416-405'. The search box and the dropdown list are highlighted with a yellow border.

The screen will display the activity roster as well as other details in **Attendance Options**.

Update on Diabetes (242) - 654321  All  Parents Only

Attendance Options

Activity Options:

Credits this activity awards:

- AMA PRA Category 1 Credits™ 2
- Non-Physician Attendance 1
- ANCC Contact Hour(s) 1
- IPCE Credit 1
- American Association of Respiratory Therapists 1
- Florida Board of Nursing 1
- ADA 1
- ACPE - Accreditation Council for Pharmacy Education 1

Select	Last, First	User ID	Degree	User Credit Eligibility	Transcript	Type	CE/Credit/Category ID	Hours Claimed	Credit Date	
<input type="checkbox"/>	Dunnah, Brooke	100	MD	AMA PRA Category 1 Credits™	Transcript		0	0.00		Remove Credit
<input type="checkbox"/>	Dunnah, Jennifer	101	MD	AMA PRA Category 1 Credits™	Transcript		0	0.00		Remove Credit
<input type="checkbox"/>	Dunnah, Jennifer	386	RN	Non-Physician Attendance	Transcript		0	0.00		Remove Credit
<input type="checkbox"/>	Green, J	487	DO	AMA PRA Category 1 Credits™	Transcript		0	0.00		Remove Credit
<input type="checkbox"/>	Green, John	694	DO	AMA PRA Category 1 Credits™	Transcript		0	0.00		Remove Credit
<input type="checkbox"/>	Witch, Thomas	385	MD	AMA PRA Category 1 Credits™	Transcript		0	0.00		Remove Credit
<input type="checkbox"/>	Wilkins, Karl	2	DO	AMA PRA Category 1 Credits™	Transcript		0	0.00		Remove Credit

The panel **Attendance Options** is on the left.

Update on Diabetes - 654321  All  Parents Only

Attendance Options

Activity Options:

Credits this activity awards:

- AMA PRA Category 1 Credits™ 2
- Non-Physician Attendance 1
- ANCC Contact Hour(s) 1
- IPCE Credit 1
- American Association of Respiratory Therapists 1
- Florida Board of Nursing 1
- AOA 1
- ACPE - Accreditation Council for Pharmacy Education 1

Attendance Date: 2/3/2019

Credit (Import Only): 2

[Last credit recorded on 2/3/2019](#)

**Add Users:**

Auto-Award Credits for Added Users

Lookup & Add Existing User:  ▼

Bulk Import:

▼

## Activity Options

Under **Activity Options**, the **Credits this activity awards** section displays a list of credit types available for the activity. These credit types are associated with the activity (found in Activity Manager > Credits and Sessions tab) and can be changed by editing the activity in Activity Manager.

Next to each credit type is a box indicating the number of credits that will be awarded when attendance is recorded. By default, this number will be the same as the number of credits entered in the Hours field in the Credits & Sessions tab for the activity in Activity Manager. The credit amount shown by each credit type will conform to the partial credit rounding rules set in Administration > Defaults > Credit Types tab.

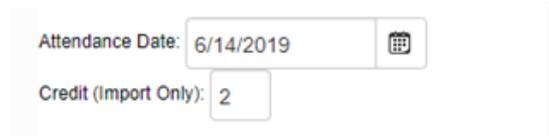
Attendance Options	Attendance Options	
	<b>Activity Options:</b>	
	<b>Credits this activity awards:</b>	
	<input checked="" type="checkbox"/> AMA PRA Category 1 Credits™	6
	<input checked="" type="checkbox"/> Non-Physician Attendance	1
	<input checked="" type="checkbox"/> AAFP - American Academy of Family Physicians	0
	<input checked="" type="checkbox"/> AAP - American Academy of Pediatrics	0
<input checked="" type="checkbox"/> ANCC - American Nurses Credentialing Center	1	
<input checked="" type="checkbox"/> AOA 1-A - American Osteopathic Association	3	

**NOTE:** Only users with one or more credit types will be able to receive credit for this activity. If a user does not have one of the credit types, edit their credit eligibility by going to Membership > Membership Manager.

**NOTE:** To award additional credit types, edit the activity under Activities > Activity Manager > Credits and Sessions tab.

## Attendance Date

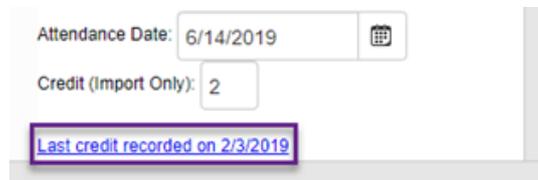
The **Attendance Date** will either default to the current date (for RSS activities) or the last date of the activity (for courses). For RSS activities, change the date to the appropriate date and record attendance. For courses, you cannot change the date.



Attendance Date: 6/14/2019 

Credit (Import Only): 2

If credits have been previously awarded, a link will display indicating when attendance was last recorded. Click the **Last credit recorded on...** link, and a list of dates will display when credits were previously awarded.



Attendance Date: 6/14/2019 

Credit (Import Only): 2

[Last credit recorded on 2/3/2019](#)



From: 1/1/2018  To: 7/2/2019 

 Export XLS

Activity ID	Activity	Recorded On	Count
240	Update on Diabetes	4/23/2018	4
240	Update on Diabetes	10/11/2018	2
240	Update on Diabetes	2/3/2019	4

## Adding Users to Attendance

The **Add Users** section allows you to add attendance to the activity.

**Add Users:**

Auto-Award Credits for Added Users

Lookup & Add Existing User:  ▼

Bulk Import:

**NOTE:** The **Auto-Award Credits for Added Users** checkbox is checked by default. When checked, any users added, using the Lookup or Bulk Import methods, will automatically have attendance recorded. Credits awarded will be the credit amount entered in the **Credit Import Only** box. If you **do not** want to award credits when adding new attendees, uncheck **Auto-Award Credits for Added Users** *before* adding new attendees.

There are several options for adding new attendees:

- **Add an existing user** - for users that already have a profile created in CloudCME®.
- **Add a new user** - for users that DO NOT already have a profile in CloudCME®.
- **Bulk import** - import a list of attendees using an Excel spreadsheet.

### Add an existing user - for users that already have a profile created in CloudCME®.

To add existing users, type their last name in the **Lookup & Add Existing User** box and select from the drop-down list.

**Add Users:**

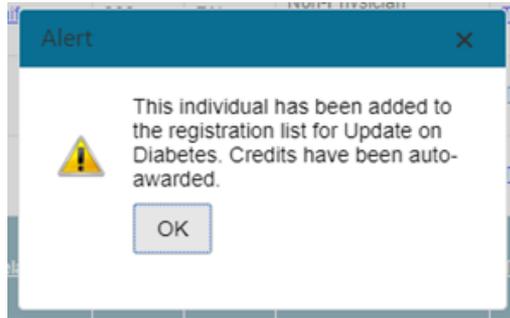
Auto-Award Credits for Added Users

Lookup & Add Existing User:  ▼

Bulk Import:

Vassalle, Angela (103) avassalle@multiweb.com  
 Vassalle, Angela (689) [redacted]  
 Vassalle, Angela (690) [redacted]  
 Vassalle, Angela (691) [redacted]  
 Vassalle, AngelaTest M [redacted]

A window will display stating the user has been added and credits have been awarded. Credits awarded to the user will equal the credit amounts listed in the box beside the credit type for which the user has credit eligibility.

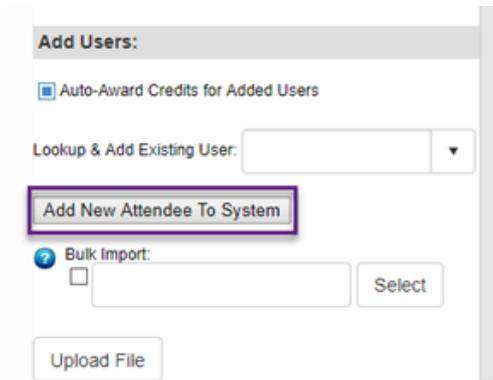


### Add a new user - for users that DO NOT already have a profile in CloudCME®

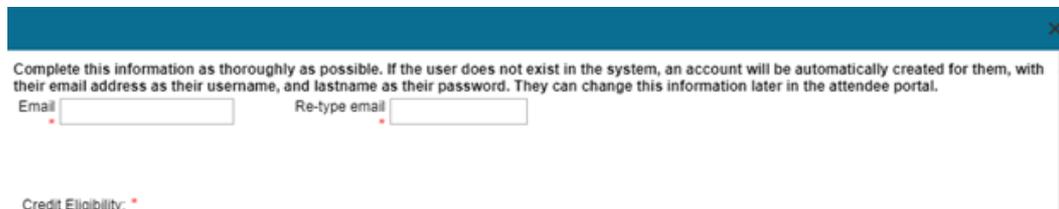
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**NOTE:** Using this method **does not** automatically award credits or record attendance. The new user is simply added to the roster.

Click the **Add New Attendee To System** button.



Fields with a red asterisk are required: Email, Re-type email, Credit Eligibility, First Name, Last Name and Degree.



<input type="checkbox"/> AMA PRA Category 1 Credits™	<input type="checkbox"/> Non-Physician Attendance	<input type="checkbox"/> Pain Management Credit	<input type="checkbox"/> ANCC Contact Hour(s)
<input type="checkbox"/> OCC Credit	<input type="checkbox"/> ABIM MOC Part 2	<input type="checkbox"/> IPCE Credit	<input type="checkbox"/> ABP MOC Part 2
<input type="checkbox"/> American Association of Respiratory Therapists	<input type="checkbox"/> Florida Board of Nursing	<input type="checkbox"/> AOA	<input type="checkbox"/> ACPE - Accreditation Council for Pharmacy Education
<input type="checkbox"/> ASWB	<input type="checkbox"/> AAPA	<input type="checkbox"/> APA	<input type="checkbox"/> COPE

First Name *	Middle Initial	Last Name *	Suffix
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Degree (select or type in) *	Organization	Department	Profession:
-- Select --	<input type="text"/>	<input type="text"/>	-- Select --

Mailing Address 1	Mailing Address 2	Mailing Address 3
<input type="text"/>	<input type="text"/>	<input type="text"/>

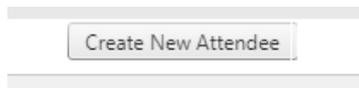
  

City	State	Zip/Postal Code	Country
<input type="text"/>	TN	<input type="text"/>	UNITED STATES

Phone +xxx (xxx) xxx-xxxx	Fax	Mobile
<input type="text"/>	<input type="text"/>	<input type="text"/>

Once the required fields are complete and any other optional fields, click **Create New Attendee** at the bottom of the page.



**NOTE:** The user will be added to the roster, but attendance **will not** be recorded nor credits awarded.

## Bulk Import - import a list of attendees using an Excel spreadsheet

To import attendees and add them to the activity, you must create a properly formatted Microsoft Excel (.xls or .xlsx) file that contains specific columns. The columns must be named **exactly** as shown. No spaces, underscores, etc. are allowed.

The fields below are **required**, and these fields **cannot** be blank for any user. The Excel file *should not* contain multiple sheets or formulas in the cells.

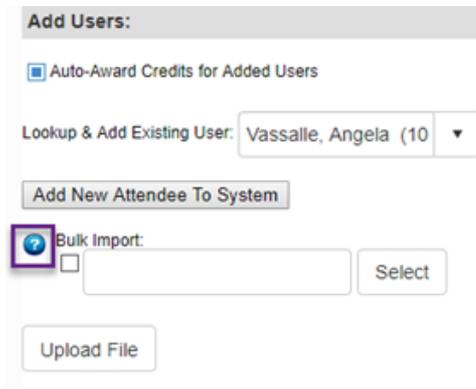
- Email
- Firstname
- Lastname
- Degree
- CECreditCategoryID

The **CECreditCategoryID** column is the credit eligibility flag in the system. These are numeric values that can be found under Administration > Defaults > Credit Types tab. While AMA PRA Category 1 credit will always be the number 1, other credit types are possible.

This value will be used in conjunction with record attendance to determine what type of credit the user is eligible for (MD's, DO,

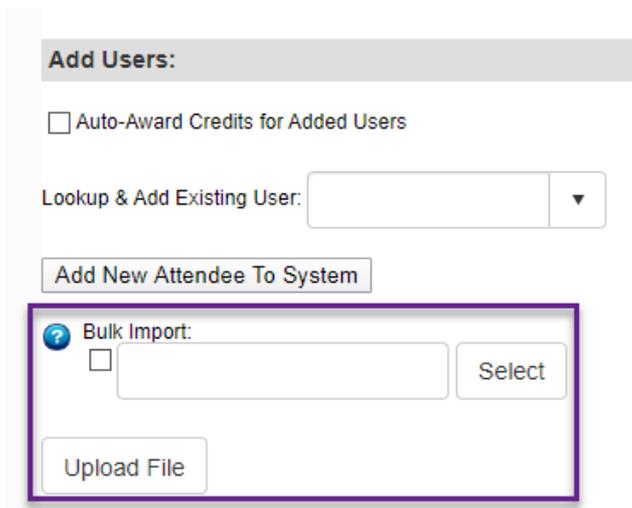
MBBS, are typically given a value of 1 for AMA PRA Category 1 Credits). Non-physicians must be set to the value for the Non-Physician attendance value as displayed in Administration > Defaults > Credit Types tab.

**NOTE:** The columns allowed during the import process may change, so please review the on-screen help by clicking the question mark in the blue circle.



The screenshot shows the 'Add Users' form. At the top, there is a checkbox for 'Auto-Award Credits for Added Users' which is checked. Below it is a 'Lookup & Add Existing User' dropdown menu showing 'Vassalle, Angela (10)'. A button labeled 'Add New Attendee To System' is positioned below the dropdown. The 'Bulk Import' section is highlighted with a blue circle; it contains a question mark icon, a checkbox, an empty text input field, and a 'Select' button. At the bottom of the form is an 'Upload File' button.

Once the spreadsheet is complete and formatted correctly, in the **Bulk Import** field, click **Select** to locate the import file. Then, click the **Upload File** button. The system will validate the file.



This screenshot shows the same 'Add Users' form, but the 'Bulk Import' section is highlighted with a purple rectangular box. The 'Auto-Award Credits for Added Users' checkbox is now unchecked. The 'Lookup & Add Existing User' dropdown is empty. The 'Bulk Import' section, including the question mark icon, checkbox, text input field, and 'Select' button, is enclosed in the purple box. The 'Upload File' button remains at the bottom.

The list of attendees will be uploaded to the activity.

## Awarding Credits

If you want to auto-award credits, make sure that:

- Credit types are checked under **Credits this activity awards**.
- **Attendance Date** is the correct date.
- **Credit (Import Only)** field has the correct number of credits.
- **Auto-Award Credits for Added Users** is checked.

Attendance Options

**Activity Options:**

Credits this activity awards:

<input checked="" type="checkbox"/>	AMA PRA Category 1 Credits™	1
<input checked="" type="checkbox"/>	Non-Physician Attendance	1

Attendance Date: 6/18/2022

Credit (Import Only): 1

No credits recorded for this activity yet.

**Add Users:**

Auto-Award Credits for Added Users

Lookup & Add Existing User:  ▼

Add New Attendee To System

Bulk Import:   Select

Upload File

**NOTE:** If you want to add an activity roster, and **do not** want to award credits, *uncheck* the **Auto-Award Credits for Added Users** checkbox.

Make your selections and click the **Save Attendance** button.

Attendance Options

Export XLS Save Attendance Remove Attendees Remove Credits

**Activity Options:**

Credits this activity awards:

- AMA PRA Category 1 Credits™ 1
- Non-Physician Attendance 1

Select	Last, First	User ID	Degree	User Credit Eligibility	Transcript	Type	CECreditCategory
<input type="checkbox"/>	Millard, Timothy	5	MD	AMA PRA Category 1 Credits™, ABIM MOC Part 2	<a href="#">Transcript</a>		0

Users will receive the credit amount listed by each credit type displayed under **Credits this activity awards:** for those credits types that match the users' credit eligibility.

## Awarding Different Credit Amounts

You can award different credit amounts for specific users through the [bulk import process](#) or by selecting users from the table, editing the credit amounts, and then saving attendance.

Enter the activity name in the search box and select it from the drop-down list. Then, go to the **Credits this activity awards** section to view the credit types for the activity and the maximum credit hours for each.

Pediatric Grand Rounds: Stroke in Childr  Parent

Attendance Options

**Activity Options:**

Credits this activity awards:

- AMA PRA Category 1 Credits™ 1
- Non-Physician Participation Credit 1
- QCHP Credits - Category 1 1

Attendance Date: 9/8/2020



AMA PRA Category 1 Credits™ 0.5

Non-Physician Participation Credit 0.5

QCHP Credits - Category 1 0.5

Attendance Date: 9/8/2020

Credit (Import Only): 1

[Last credit recorded on 9/8/2020](#)

Select	Last, First	User ID	Degree	User Credit Eligibility	Transcript	Type	CECreditCategor	Hours Claimed	Credit Date
<input checked="" type="checkbox"/>	Abano, Aira marie	6591	BSN	Non-Physician Participation Credit,CNE Nursing Credits,QCHP Credits - Category 1,IPCE Credits,QCHP Credits - Category 3,QCHP Credits - Mixed Category 1 & 3	Transcript		0	0	

Uncheck the **Select** checkbox to deselect all users in the roster (none of the rows will be highlighted blue).

Pediatric Grand Rounds: Stroke in Childr ▾  Parents Only

Attendance Options

Export XLS Save Attendance Remove Attendees Remove Credits

**Activity Options:**

Credits this activity awards:

AMA PRA Category 1 Credits™ 0.5

Non-Physician Participation Credit 0.5

QCHP Credits - Category 1 0.5

Attendance Date: 9/8/2020

Credit (Import Only): 1

[Last credit recorded on 9/8/2020](#)

Select	Last, First	User ID	Degree	User Credit Eligibility	Transcript	Type	CECreditCategor	Hours Claimed	Credit Date
<input type="checkbox"/>	Abano, Aira marie	6591	BSN	Non-Physician Participation Credit,CNE Nursing Credits,QCHP Credits - Category 1,IPCE Credits,QCHP Credits - Category 3,QCHP Credits - Mixed Category 1 & 3	Transcript		0	0	

Scroll through the roster, and check the checkbox next to each user's name that you want to award credit hours.

Pediatric Grand Rounds: Stroke in Children - September 8, 2020 (9/8/2020 - 9/8/2020) (Total:1223, Attended:38 No Attendance:1185)

Attendance Options

Export XLS Save Attendance Remove Attendees Remove Credits

**Activity Options:**

Credits this activity awards:

AMA PRA Category 1 Credits™ 0.5

Non-Physician Participation Credit 0.5

Select	Last, First	User ID	Degree	User Credit Eligibility	Transcript	Type	CECreditCategor	Hours Claimed	Credit Date
<input checked="" type="checkbox"/>	Abano, Aira marie	6591	BSN	CNE Nursing Credits,QCHP Credits - Category 1,IPCE	Transcript		0	0	

QCHP Credits - Category 1 0.5

Attendance Date:

Credit (Import Only):

[Last credit recorded on 9/8/2020](#)

**Add Users:**

Auto-Award Credits for Added Users

Lookup & Add Existing User:

Bulk Import:

<input type="checkbox"/>	User	User ID	Degree	Credit Category	Transcript	Hours Claimed	Hours Available
<input type="checkbox"/>	Abbas, Rasha	5806		Non-Physician Participation Credit	<a href="#">Transcript</a>	0	0
<input checked="" type="checkbox"/>	Abbasi, Saleha	3124	MD	AMA PRA Category 1 Credits™, QCHP Credits - Category 1, IPCE Credits, QCHP Credits - Category 3, QCHP Credits - Mixed Category 1 & 3	<a href="#">Transcript</a>	0	0

Once all users have been selected, click **Save Attendance** to update the credit hours.

Pediatric Grand Rounds: Stroke in Children - September 8, 2020 (9/8/2020 - 9/8/2020) (Total:1223, Attended:38 No Attendance:1185)

**Attendance Options**

**Activity Options:**

Credits this activity awards:

AMA PRA Category 1 Credits™ 0.5

Non-Physician Participation Credit 0.5

QCHP Credits - Category 1 0.5

Attendance Date:

Credit (Import Only):

[Last credit recorded on 9/8/2020](#)

**Add Users:**

Auto-Award Credits for Added Users

Lookup & Add Existing User:

Bulk Import:

<input type="checkbox"/>	Last, First	User ID	Degree	User Credit Eligibility	Transcript	Type	CECreditCategor	Hours Claimed	Credit Date
<input checked="" type="checkbox"/>	Abano, Aira marie	6591	BSN	Credit, CNE Nursing Credits, QCHP Credits - Category 1, IPCE Credits, QCHP Credits - Category 3, QCHP Credits - Mixed Category 1 & 3	<a href="#">Transcript</a>		0	0	
<input type="checkbox"/>	Abbas, Rasha	5806		Non-Physician Participation Credit	<a href="#">Transcript</a>		0	0	
<input checked="" type="checkbox"/>	Abbasi, Saleha	3124	MD	AMA PRA Category 1 Credits™, QCHP Credits - Category 1, IPCE Credits, QCHP Credits - Category 3, QCHP Credits - Mixed Category 1 & 3	<a href="#">Transcript</a>		0	0	

Using the Bulk Import process, you can specify credit amounts to award for each attendee and the date to award credit (for an RSS or Enduring Material activity) in the spreadsheet. Check the **Auto-Award Credits for Added Users** checkbox and add the CREDITDATE and HOURSCLAIMED columns to the spreadsheet.

- CREDITDATE - must be formatted as mm/dd/yyyy (i.e. 1/1/2018 or 12/31/2017)
- HOURSCLAIMED - must be a numerical value only. It can be a decimal point (like .5) or a whole number (like 1) or a combination (like 1.5).

## Supported Column Names

Below is a list of supported column names. The required fields are bold and the other fields are optional. Only include optional fields when data for that column is needed. Optional fields will need to be completed for all users in the file.

**NOTE:** Imported columns with no data (empty cells) can cause import errors.

<ul style="list-style-type: none"> <li>• <b>EMAIL</b></li> <li>• <b>CECreditCategoryID</b></li> <li>• SALUTATION</li> <li>• <b>FIRSTNAME</b></li> <li>• MIDDLEINITIAL</li> <li>• <b>LASTNAME</b></li> <li>• SUFFIX</li> <li>• FELLOWSHIPS</li> <li>• <b>DEGREE</b></li> <li>• NAMEONBADGE</li> <li>• SPOUSENAME</li> <li>• BIRTHDAY</li> <li>• BIRTHMONTH</li> </ul>	<ul style="list-style-type: none"> <li>• HOURSCLAIMED</li> <li>• CREDITDATE</li> <li>• ORGANIZATION</li> <li>• ADDRESS</li> <li>• ADDRESS2</li> <li>• SUITE</li> <li>• CITY</li> <li>• STATE</li> <li>• ZIP</li> <li>• COUNTRY</li> <li>• PHONE</li> <li>• FAX</li> <li>• CELL</li> </ul>	<ul style="list-style-type: none"> <li>• PROFESSIONALTITLE</li> <li>• SECONDARYADDRESS</li> <li>• SECONDARYADDRESS2</li> <li>• SECONDARYSUITE</li> <li>• SECONDARYCITY</li> <li>• SECONDARYSTATE</li> <li>• SECONDARYZIP</li> <li>• SECONDARYCOUNTRY</li> <li>• ADMIN</li> <li>• ADMINPHONE</li> <li>• ADMINEMAIL</li> <li>• EMAILOPTIN</li> <li>• OPTOUTDIRECTORY</li> <li>• NOMAIL</li> </ul>
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**CREDITDATE** column – the date credit is to be awarded. The data entered must be formatted as mm/dd/yyyy (i.e. 1/1/2018 or 12/31/2017)

**HOURSCLAIMED** column – the number of credit hours awarded to the user. The data entered must be a numerical value only. It can be a decimal point (.5), a whole number (1) or a combination (1.5).

**EMAILOPTIN** column – this column is optional. Two values can be specified as illustrated below:

- 0 - Indicates that the member would like to receive emails from the organization
- -1 - Indicates that the member would NOT like to receive emails from the organization.

**OPTOUTDIRECTORY** column - this column is optional. Two values can be specified as illustrated below:

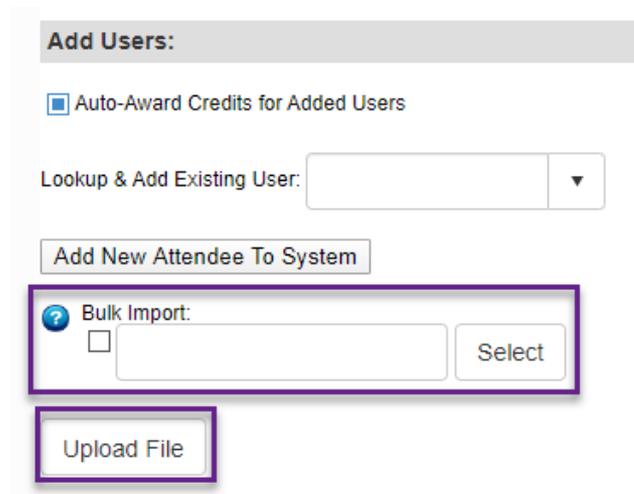
- 0 - Indicates that the member would like to display in the membership directory.
- -1 - Indicates that the member would NOT like to display in the membership directory.

**NOMAIL** column - this column is optional. Two values can be specified as illustrated below:

- 0 - Indicates that the member would like to mailings from the organization.
- -1 - Indicates that the member would NOT like to receive mailings from the organization.

A sample bulk import Excel file can be found [here](#).

Once the spreadsheet is complete, in the **Bulk Import** field, click **Select** to locate the bulk import file on your desktop. Then, click the **Upload File** button. The system will validate the import file.



The screenshot shows a web interface titled "Add Users:". It contains several elements: a checked checkbox for "Auto-Award Credits for Added Users", a "Lookup & Add Existing User:" field with a dropdown arrow, a button labeled "Add New Attendee To System", a "Bulk Import:" section with an unchecked checkbox, a text input field, and a "Select" button. Below this is an "Upload File" button. The "Bulk Import" section and the "Upload File" button are highlighted with purple rectangular boxes.

The users will have the updated credit hours and credit date specified in the spreadsheet.

## Recording Attendance

On the **Record Attendance** screen, the activity roster is on the right. If any users on the list need attention, they will be highlighted in red. Users highlighted in red are *not* eligible for the credit types the activity is awarding. Before recording attendance, any issues

...that users highlighted in red are not eligible for this credit type and activity is awarding. Before recording attendance, any users with users highlighted in red must be corrected.

Update on Diabetes (240) - 654321  All  Parents Only

Attendance Options:  Export XLS  Save Attendance

Activity Options:  
Credits this activity awards:  
 AMA PRA Category 1 Credits™ 2  
 Non-Physician Attendance 1  
 ANCC Contact Hour(s) 1  
 IPCE Credit 1  
 American Association of Respiratory Therapists 1  
 Florida Board of Nursing 1  
 ADA 1  
 ACPE - Accreditation Council for Pharmacy Education 1

Select	Last, First	User ID	Degree	User Credit Eligibility	Transcript	Type	CE/Credit Category ID	Hours Claimed	Credit Date	
<input type="checkbox"/>	Donnell, Brooke	100	MD	AMA PRA Category 1 Credits™	Transcript		0	0		Remove Credit
<input type="checkbox"/>	Donnell, Jennifer	101	MD	AMA PRA Category 1 Credits™	Transcript		0	0		Remove Credit
<input type="checkbox"/>	Donnell, Jennifer	385	RN	Non-Physician Attendance	Transcript		0	0		Remove Credit
<input type="checkbox"/>	Green, J	487	DO	AMA PRA Category 1 Credits™	Transcript		0	0		Remove Credit
<input type="checkbox"/>	Green, John	694	DO	AMA PRA Category 1 Credits™	Transcript		0	0		Remove Credit
<input checked="" type="checkbox"/>	Vissath, Arosha	102	MS, PhD	AMA PRA Category 1 Credits™ - ABIM/MOC Part 2	Transcript	AMA PRA Category 1 Credits™	1	2.00	8/14/2019	Remove Credit
<input type="checkbox"/>	Wach, Thomas	385	MD	AMA PRA Category 1 Credits™	Transcript		0	0		Remove Credit
<input type="checkbox"/>	Williams, Karl	2	DO	AMA PRA Category 1 Credits™	Transcript		0	0		Remove Credit

Attendance Date: 6/14/2019

**NOTE:** If a user is added that does not have the appropriate credit eligibility in their profile, as long as that user is not an MD, and the activity is awarding Non-Physician Attendance, the user will be added without error and their profile updated to include the Non-Physician credit eligibility. This only happens for activities that award Non-Physician Attendance.

## Recording Attendance - General Attendance

*If recording attendance for the first time, and all attendees will receive the same number of credits:*

1. In the left column, check the users who attended
2. Click **Save Attendance**.

*The screen will refresh, and users whose attendance has been recorded will be checked and highlighted in blue. Additionally, the screen will indicate how many hours they received and for which credit type(s) based on their eligibility.*

Update on Diabetes - 654321  All  Parents Only

Attendance Options:  Export XLS

Activity Options:  
Credits this activity awards:  
 AMA PRA Category 1 Credits™ 2

Select	Last, First	User ID	Degree	User Credit Eligibility	Transcript	Type	CE/Credit Category ID	Hours Claimed	Credit Date	
<input checked="" type="checkbox"/>	Donnell, Brooke	100	MD	AMA PRA Category 1	Transcript		0	0.00		

<input checked="" type="checkbox"/>	Non-Physician Attendance	1	<input checked="" type="checkbox"/>	<a href="#">Donnelly, Jennifer</a>	101	MD	AMA PRA Category 1 Credits™	<a href="#">Transcript</a>	0	0.00
<input checked="" type="checkbox"/>	ANCC Contact Hour(s)	1	<input type="checkbox"/>	<a href="#">Donnelly, Jennifer</a>	386	RN	Non-Physician Attendance	<a href="#">Transcript</a>	0	0.00
<input checked="" type="checkbox"/>	IPCE Credit	1	<input checked="" type="checkbox"/>	<a href="#">Welch, Thomas</a>	385	MD	AMA PRA Category 1 Credits™	<a href="#">Transcript</a>	0	0.00
<input checked="" type="checkbox"/>	American Association of Respiratory Therapists	1	<input type="checkbox"/>	<a href="#">Wilkins, Karl</a>	2	DO	AMA PRA Category 1 Credits™	<a href="#">Transcript</a>	0	0.00
<input checked="" type="checkbox"/>	Florida Board of Nursing	1	<input type="checkbox"/>							

**NOTE:** If recording attendance for an RSS activity, always make sure, before recording attendance, that the Attendance Date is correct. You *cannot* change the Attendance Date for Courses as this date defaults to the last day of the course.

## Record Attendance for An Attendee After Attendance Has Been Recorded

If you have already recorded attendance for most attendees (attendees will be checked off and highlighted in blue in the Record Attendance screen for the activity) and learn that an attendee was missed or reported later, please follow these steps to record attendance:

1. Check the **Select All** checkbox to select everyone on the roster (everyone will be highlighted blue).

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Select All

<input checked="" type="checkbox"/>	Last, First	User ID	Degree	User Credit Eligibly	Transcript	Type	CE Credit Category ID	Hours Claimed	Credit Date
<input checked="" type="checkbox"/>	Donnelly, Brooke	100	MD	AMA PRA Category 1 Credits™	Transcript	AMA PRA Category 1 Credits™	1	2.00	2/3/2019
<input checked="" type="checkbox"/>	Donnelly, Jennifer	101	MD	AMA PRA Category 1 Credits™	Transcript	AMA PRA Category 1 Credits™	1	2.00	2/3/2019
<input checked="" type="checkbox"/>	Donnelly, Jennifer	386	RN	Non-Physician Attendance	Transcript		0	0	
<input checked="" type="checkbox"/>	Welch, Thomas	385	MD	AMA PRA Category 1 Credits™	Transcript	AMA PRA Category 1 Credits™	1	2.00	2/3/2019
<input checked="" type="checkbox"/>	Wilkins, Karl	2	DO	AMA PRA Category 1 Credits™	Transcript		0	0	

2. Then, uncheck the **Select All** checkbox to deselect everyone on the roster (nobody will be highlighted in blue).

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Select All

<input type="checkbox"/>	Last, First	User ID	Degree	User Credit Eligibly	Transcript	Type	CE Credit Category ID	Hours Claimed	Credit Date
<input type="checkbox"/>	Donnelly, Brooke	100	MD	AMA PRA Category 1 Credits™	Transcript	AMA PRA Category 1 Credits™	1	2.00	2/3/2019
<input type="checkbox"/>	Donnelly, Jennifer	101	MD	AMA PRA Category 1 Credits™	Transcript	AMA PRA Category 1 Credits™	1	2.00	2/3/2019
<input type="checkbox"/>	Donnelly, Jennifer	386	RN	Non-Physician Attendance	Transcript		0	0	
<input type="checkbox"/>	Welch, Thomas	385	MD	AMA PRA Category 1 Credits™	Transcript	AMA PRA Category 1 Credits™	1	2.00	2/3/2019
<input type="checkbox"/>	Wilkins, Karl	2	DO	AMA PRA Category 1 Credits™	Transcript		0	0	

3. Check the checkbox for that user only and then click **Save Attendance**. The screen will refresh and the user's attendance will be recorded.

Update on Diabetes - 654321  All  Parents Only

Activity Options:

- AMA PRA Category 1 Credits™ 2
- Non-Physician Attendance 1
- ANCC Contact Hour(s) 1
- IPCE Credit 1
- American Association of Respiratory Therapists 1
- Florida Board of Nursing 1
- ADA 1
- ACPE - Accreditation Council for Pharmacy Education 1

Select	Last, First	User ID	Degree	Use Credit Eligibility	Transcript	Type	CE/Credit/CategoryID	Hours Claimed	Credit Date
<input type="checkbox"/>	Conroy, Brooke	100	MD	AMA PRA Category 1 Credits™	Transcript	AMA PRA Category 1 Credits™	1	2.00	2/3/2019
<input checked="" type="checkbox"/>	Conroy, Jennifer	101	MD	AMA PRA Category 1 Credits™	Transcript	AMA PRA Category 1 Credits™	1	2.00	2/3/2019
<input type="checkbox"/>	Conroy, Jennifer	386	RN	Non-Physician Attendance	Transcript	Non-Physician Attendance	3	1.00	2/3/2019
<input type="checkbox"/>	Wick, Thomas	305	MD	AMA PRA Category 1 Credits™	Transcript	AMA PRA Category 1 Credits™	1	2.00	2/3/2019
<input type="checkbox"/>	Wilkins, Karl	2	DO	AMA PRA Category 1 Credits™	Transcript		0	0	

**NOTE:** If recording attendance for an RSS activity, always make sure, before recording attendance, that the Attendance Date is correct. You cannot change the Attendance Date for Courses as this date defaults to the last day of the course.

## Filter RSS Attendees

For RSS activities, filters have been provided as an additional means to narrow the attendee list that displays in the roster. **NOTE:** The filters are mutually exclusive and are **not** meant to be used together.

**Filter RSS Attendees:**

View users with attendance in the previous number of months:

Only show users who have attended in the past:

The first filter, **Attendance in the Previous Number of Months**, is used to filter users who have not received credit within x number of months. Enter the number of months you would like to filter the attendance and click **Filter**.

**Filter RSS Attendees:**

View users with attendance in the previous number of months:

SEARCH FILTERS

The screen will refresh and the filtered results will display on the right-hand side of the screen.

Select	Last, First	User ID	Degree	User Credit Eligibility	Transcript	Type	CECreditCategoryID	Hours Claimed	Credit Date	
<input type="checkbox"/>	Donnelly, Jennifer	293417	MD	AMA PRA Category 1 Credits™, ABIM MOC Part 2, AGA Category 1-A - American Osteopathic Association	Transcript		0	0.00		<a href="#">Remove Credit</a>

The second filter, **Only show users who have attended in the past**, will remove anyone in the roster but has not received credit. Check this checkbox, and the screen will refresh and display the filtered results on the roster list on the right side of the screen.

**Only show users who have attended in the past:**

You can click the **Reset Filters** button to undo the filters you previously used.

## Editing Attendance

To make changes to the attendance or the credits awarded to attendees, go to the Record Attendance screen.

To remove attendance for an individual whose attendance was recorded in error:

Both credits and attendance can be removed by using the **Remove Credit** link at the end of each attendee's row.

If you have recorded attendance for an individual, and they were awarded credits (they are highlighted in blue and have credits in the Hours Claimed column):

1. Locate the attendee in the list
2. Click the **Remove Credit** link for that attendee.

Select	Last, First	User ID	Degree	User Credit Eligibility	Transcript	Type	CECreditCategoryID	Hours Claimed	Credit Date	
<input type="checkbox"/>	Donnelly, Brooke	100	MD	AMA PRA Category 1 Credits™	Transcript	AMA PRA Category 1 Credits™	1	2.00	2/3/2019	<a href="#">Remove Credit</a>
<input type="checkbox"/>	Donnelly, Jennifer	101	MD	AMA PRA Category 1 Credits™	Transcript	AMA PRA Category 1 Credits™	1	2.00	2/3/2019	<a href="#">Remove Credit</a>

<input type="checkbox"/>	Donnath, Jennifer	388	RN	Non-Physician Attendance	Transcript		0	0		Remove Credit
<input type="checkbox"/>	Weekh, Thomas	385	MD	AMA PRA Category 1 Credits™	Transcript	AMA PRA Category 1 Credits™	1	2.00	2/3/2019	Remove Credit
<input type="checkbox"/>	Wilkins, Karl	2	DO	AMA PRA Category 1 Credits™	Transcript		0	0		Remove Credit

This will remove credits, and attendance will be unrecorded.

Alternatively, if credits were not awarded but attendance was recorded by accident (they are highlighted in blue with 0.00 credits in the Hours Claimed column), you can use the **Remove Credit** link for the attendee and attendance will be unrecorded (they will no longer be highlighted in blue).

### Remove attendance on one date and record it on another.

#### To change the attendance date for the entire roster:

On the date where credit was recorded incorrectly:

1. Check the **Select All** checkbox to select everyone on the roster (everyone will be checked and highlighted in blue).
2. Click **Remove Credits** at the TOP of the screen to remove credits and attendance for that date.
3. Change the **Attendance Date** to the correct date (the date attendance should be recorded).
4. Either check the **Select All** checkbox again (if everyone should have attendance recorded) or check the individuals whose attendance should be recorded then click **Save Attendance**.

#### To change the attendance date for an individual:

1. Go to the **Credit Manager** screen in **Activities > Credit Manager**.
2. Look up the activity and the user, locate the credit you wish to change and click **Edit**.
3. Change the date, and then click **Update**.

[Manage Credits](#)

*Instructions: Select a date range, activity, and optionally a user, then click Submit. You can add credits by clicking Add New Record when the grid appears. You can also delete credits if they have been assigned incorrectly.*

From:  To:  Activity:   All  Parents Only

Credit ID	ID	Name	Degree	Type	Activity	Type	Dates	Activity Code	C
-----------	----	------	--------	------	----------	------	-------	---------------	---

86374	30836	Beverly Millard, MD	MD	American Academy of Family Phy Prescribed Credits	CloudCME Test	Directly Provided - Courses	June 7, 2016 - December 21, 2017	2905	4

Lookup User: Millard, Beverly

Credit Type: American Academy c

Attendance Date: 12/21/2017

Credit Hours: 4

Update Cancel

### Sample Import File

Here is a [sample Excel import file](#) for reference.

[SampleImportFile.xlsx \(9 KB\)](#)

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