How to "Virtualize" your CME series and other department meetings

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NYU Winthrop Hospital | NYU Long Island School of Medicine

FOR DIRECTORS, COORDINATORS AND CME FIELD AGENTS OF GRAND ROUNDS, CASE CONFERENCES, JOURNAL CLUBS, M&M, TUMOR BOARDS, AND REGULAR DEPARTMENT MEETINGS

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Learning Objectives for this session:

1. Analyze ways to **transition your in-person meetings** to Web-Based

2. Demonstrate the mechanisms for **paperless CME attendance credit** for your web-based session (E-Sign-In)

Why Virtual? An Expectation that we will offer web-based Meeting attendance has arrived.
(COVID-19 mitigation)

▶ **Forced Evolution:** Dinosaurs with feathers **had a survival advantage when the environment changed!** ------→

▶ A huge demand for virtual meetings means planners & coordinators must **become self-sufficient in mastering virtual meeting skills**

▶ Resist an attitude of "Just call I.T." and "Get a webex expert": **This will mean long queues for service**; you may miss the chance to adapt for the future!

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Objective 2:
Analyze ways to **transition your in-person meetings** to Web-Based meetings

# Top-Line Considerations
for adapting your in-person meeting to the web:

1. How many speakers?

2. How many locations?

3. How many participants?

▶ *Scale does matter …*

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What is the meeting content?

1. **Visual?** (Slides, video, speaker facing camera)
2. **Audio?** (lecture, audio, video, music)
3. **Discussion?** (oral Q&A, moderated discussion)
4. **Q&A submission?** (Oral questions, chat-box questions, submit pre-meeting)
5. **Assessments/Polls/Quizzes?**

▶ *Complexity does <u>matter</u>: Simplify where possible!*

▶ *Innovate AFTER you get comfortable with the platform; <u>keep it simple</u> your first time out!*

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How interactive is your content?

1. Lecture-based?

2. Discussion Based?

3. Breakout-Teams?

4. Individualized Feedback to Learners?

▶ **Personalization matters**: Encourage speakers to use a webcam or display their photo during the webex

▶ Sessions that feature Hands-On Training of Clinical Skills **may not adapt well to a web-based format**, if physical manipulation of patients or procedures will be assessed.

▶ However, **wearable and handheld devices <u>can</u> be used**, if your learners have these available at their locations.

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Four formats to think about:

|	Format		Pros	Cons
Live/"Synchronous"= all participate at a pre- scheduled time	A.	Speakers present to web audience **from a single location,** a.k.a "Studio"	• Social distancing for learners • Few computers hosting content	• No social distancing for speakers • Non-employee speakers may be barred from joining the speaker group in-person
	B.	Speakers present to web audience **from various locations**	• High social distancing	• Multiple computers presenting: Requires moderator to "throw" session control to speakers' computers
	C.	**Speakers pre-record all their content** and submit it for mock-live scheduled lineup	• High social distancing	• Requires Speaker content coordination in advance • Speakers may require assistance in self-recording • Little opportunity for learner Q&A
On-Demand/ Asynchronous"= content consumption can be time-shifted by participants/learners	D.	**All Speaker content pre-recorded** and arranged as a view-on-demand presentation	• Highest Convenience to Learner Schedules • High social distancing • Allows control/curation of presentation	• Same as C • Requires "instructional design skills" • Least interactive • No opportunity for live feedback to learners • Learning may be less "Sticky"

Option 1: Quick-Start Guide to Scheduling Webex Meetings (courtesy of MCIT)

Quick-Start Guide to Scheduling and Joining Webex Meetings

Schedule Webex Meetings using Outlook/Webex integration
(not applicable for Outlook Web Access/OWA)

Note that this toolbar is not available while using webmail

1. On the Home ribbon and Webex toolbar, click on the top of the Schedule Meeting icon.

2. A new appointment message appears.
   a. Enter your meeting subject, location, date, and time. Invite attendees.
   b. Click **Cancel Webex Meeting** to proceed with a regular calendar invite.
   c. Click **Change Settings** to modify settings for audio & tracking, registration, and resources for alternate hosts(s)
   d. Click **Recurring Meeting** to establish a recurring pattern for your meeting.
   e. Enter any additional context necessary but be sure **not** to modify any of the pre-filled text.
   f. Click Send and attendees will receive an email invitation with a link to the meeting formation, as well as the ability to add the meeting to their own calendar. The meeting will also show in your Outlook calendar and Webex Meetings list.
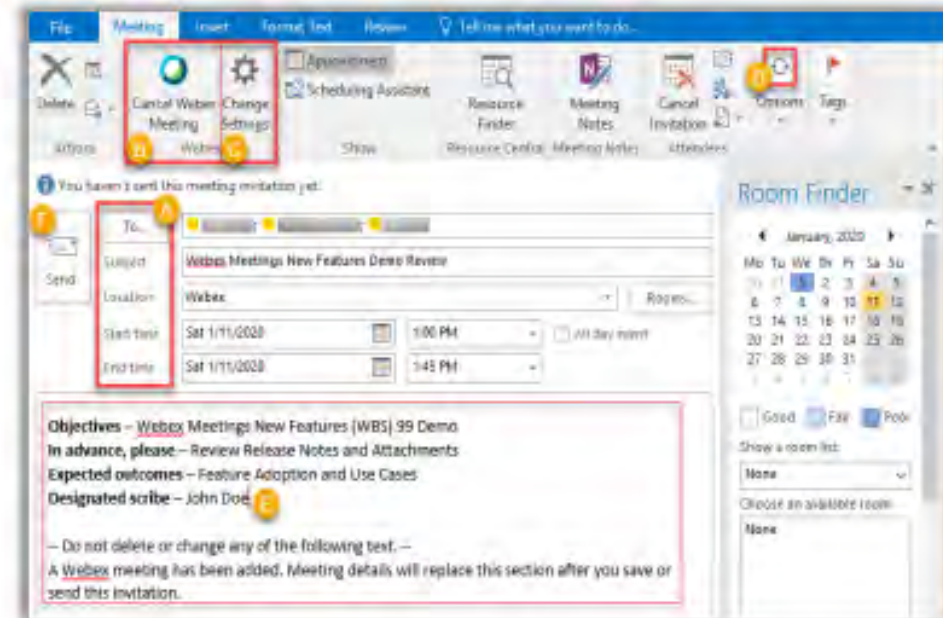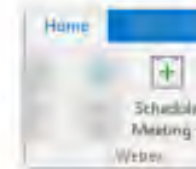
Option 2: Schedule a Webex session using the Webex site (for computers without Outlook installed)

▶ Log-in to Inside Health:

 ▶ https://central.nyumc.org/

▶ Use your **Kerberos ID and password**

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Option 2: (cont'd): Use the search field to search for "Webex". **Favorite** to save it in your dashboard shortcuts.
Click **Launch**.

Option 2: (cont'd): **On the upper right, click the "Log-in" link to log-in to Webex as a host.**

► (If instead you see your Kerberos ID and "Log Out" displayed in the upper right, you are *already* logged into Webex)

Option 2: (cont'd): On the left-hand side, click to expand the Triangle next to " Host a Meeting"

▶ Click on Schedule a Meeting
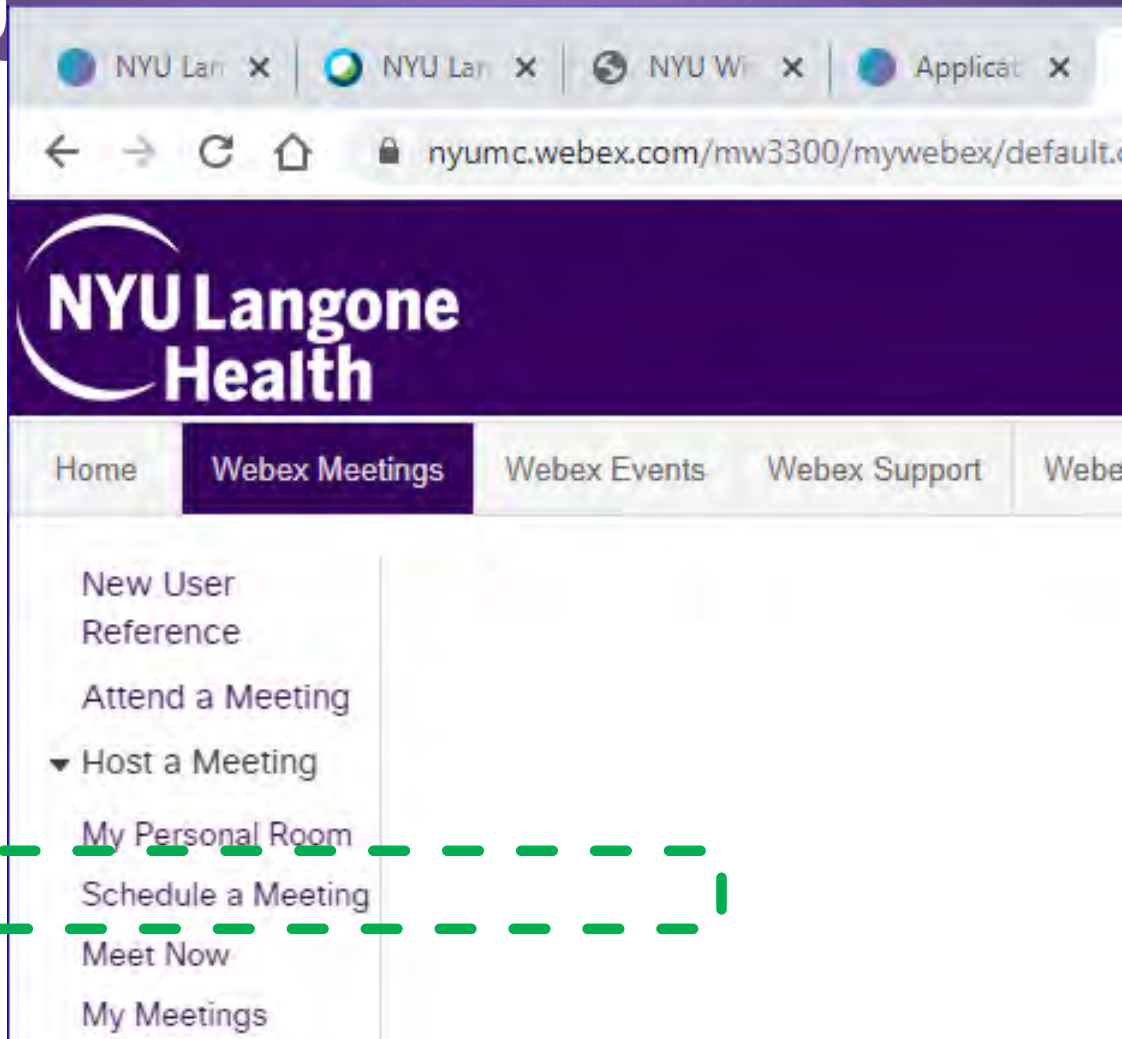
Option 2: (cont'd): **For Meetings that will** <u>not need a recurrence</u>**, use the Quick Scheduler**

New User Reference

Attend a Meeting

▾ Host a Meeting

My Personal Room

Schedule a Meeting

Meet Now

My Meetings

My Recorded Meetings

▸ Set Up

▾ Support

Help

MyResources

Downloads

Training

Schedule a Meeting

Set options using template

To set advanced meeting options or to schedule a Personal Conference meeting, go to Advanced Scheduler

* Meeting topic: [   ]

Password: [   ] ⊕ ⓘ

Date: [03/12/2020]

Time: [1] ▾ [45] ▾ ○ am ● pm

New York Time

Duration: [1 hr] ▾ [0 min] ▾

Attendees: [<Separate email addresses with a comma or semicolon>]

Use address book

☐ Let anyone with a host account on this site or anyone joining from an authenticated Cisco video device in this organization host my meeting

☐ Send a copy of the invitation email to me

Audio conference: Webex Audio

Change audio conference

Save as template

[Start] [Cancel]

Option 2: (cont'd): Schedule a Meeting screen (Quick scheduler)

► **Meeting Topic** – Type in the name of your Grand Rounds session and the date of the session, or the presenter topic.

► **Password** – Enter a Password if you require attendee registration

► **Date** – Click on the field and set to the session date

► **Time** – indicate the start time of the session

► **Duration** –leave the information as 1 hour and 0 minutes, or longer if you wish the session to be longer

► **Attendees** – we suggest you include the E-mail addresses ONLY for your speakers, using a comma or a semicolon to separate E-mail addresses.

► Check the box for "**Send a Copy of the invitation E-mail to me**". Forward this invitation email to your invitees/attendees list as needed.

► **Do not forward to your attendees the second email that Webex will send you containing the Host Key**, as this will give away your control of the session to whomever inputs the Host Key first, and the Host Role will be difficult to regain.

Option 2: (cont'd): Or, use the Advanced Scheduler to setup a RECURRING meeting (weekly, monthly)

Inviting your participants to your Webex

▶ When sending your group the Meeting Calendar invite:

1. **Do Attach** the "Webex Etiquette Do's and Don'ts When Dialing In" Guide

   ▶ Get it here:

   https://bit.ly/2wkG7he

2. **Do Attach** the "Getting Started with E-Sign-In" guide

   ▶ Get it here:

   https://bit.ly/2QwKOeP

This step will **email you a meeting invitation** that you can forward to your list of participants.

- **You can forward this email to your existing list of participants and instruct them to:**

  1. **Open the .ics attachment, and**

  2. **ACCEPT it into their Outlook calendar, to get a popup reminder at meeting time.**

- **You can also email meeting invites quickly using the Webex tool in your Outlook toolbar (see Option 1, Quickstart Guide)**

Robert Martin invites you to join this Webex meeting.

Meeting number (access code): 739 067 766

Tuesday, February 25, 2020
3:30 pm | Eastern Standard Time (New York, GMT-05:00) | 1 hr

Join meeting

Join by phone
Tap to call in from a mobile device (attendees only)
+1 855 698 2663 NYUMC WebEX Tollfree
+1 646 754 2524 NYUMC WebEX Toll
Global call-in numbers | Toll-free calling restrictions

Join from a video system or application
Dial 739067766@nyumc.webex.com
You can also dial 173.243.2.68 and enter your meeting number.

Join using Microsoft Lync or Microsoft Skype for Business
Dial 739067766.nyumc@lync.webex.com

Pre-Meeting Checklist:
5 Tips for Excellent Webex Meetings

1. **Always email** a Webex Outlook Calendar invite to your participants

2. **Always include** the "Webex Etiquette" and "Getting Started with E-Sign In" guides when sending your Webex Calendar invites

3. **Always look up** the Event ID from CloudCME, and paste an updated **E-Sign-In Event Seal** at the end of your meeting slides.

4. **Always remind** the audience about E-Sign-in for CME/CE credit at the start and end of your meetings

5. **Always mute** the non-speakers in your Webex session.
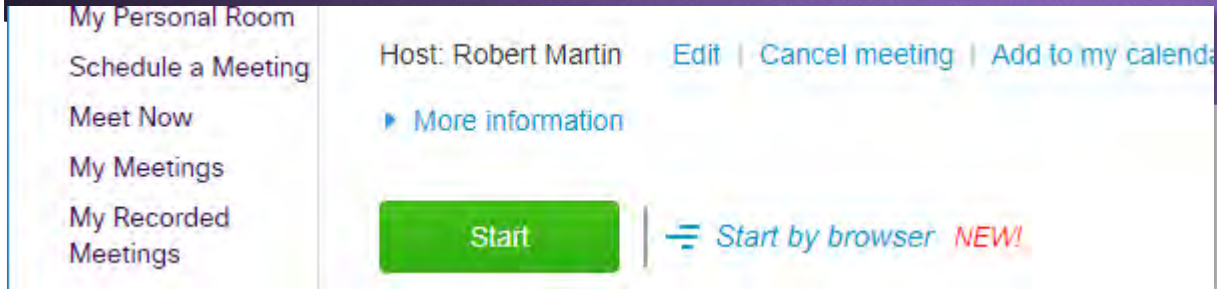
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Set the Stage

▶ It's wise to ask your presenters to join your Webex 15 minutes early, so that you can:

1. Test their audio, camera and microphones

2. Manage Presenter privileges, especially if speakers will present from various locations

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Pre-recording a speaker

▶ In some cases is may be necessary to **pre-record your speaker's talk before the live web meeting.**

▶ To do so, **schedule a separate session with the speaker at least 2 days before the audience meeting.** Record this session with the speaker.

▶ **Download the recording** from Webex "My Recorded Meetings." **Always preview the recording** to make sure it is intact, prior to playing it for the audience.

▶ Webex Recordings may lack the high-definition needed for a satisfactory video experience, in which case you can **re-record the slides in Camtasia or a similar program, and insert the Audio** from your Webex Recording for a better match. **Consult an experienced video editor** for help in doing this.

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When your scheduled Webex time arrives, Click the Green Start Button.
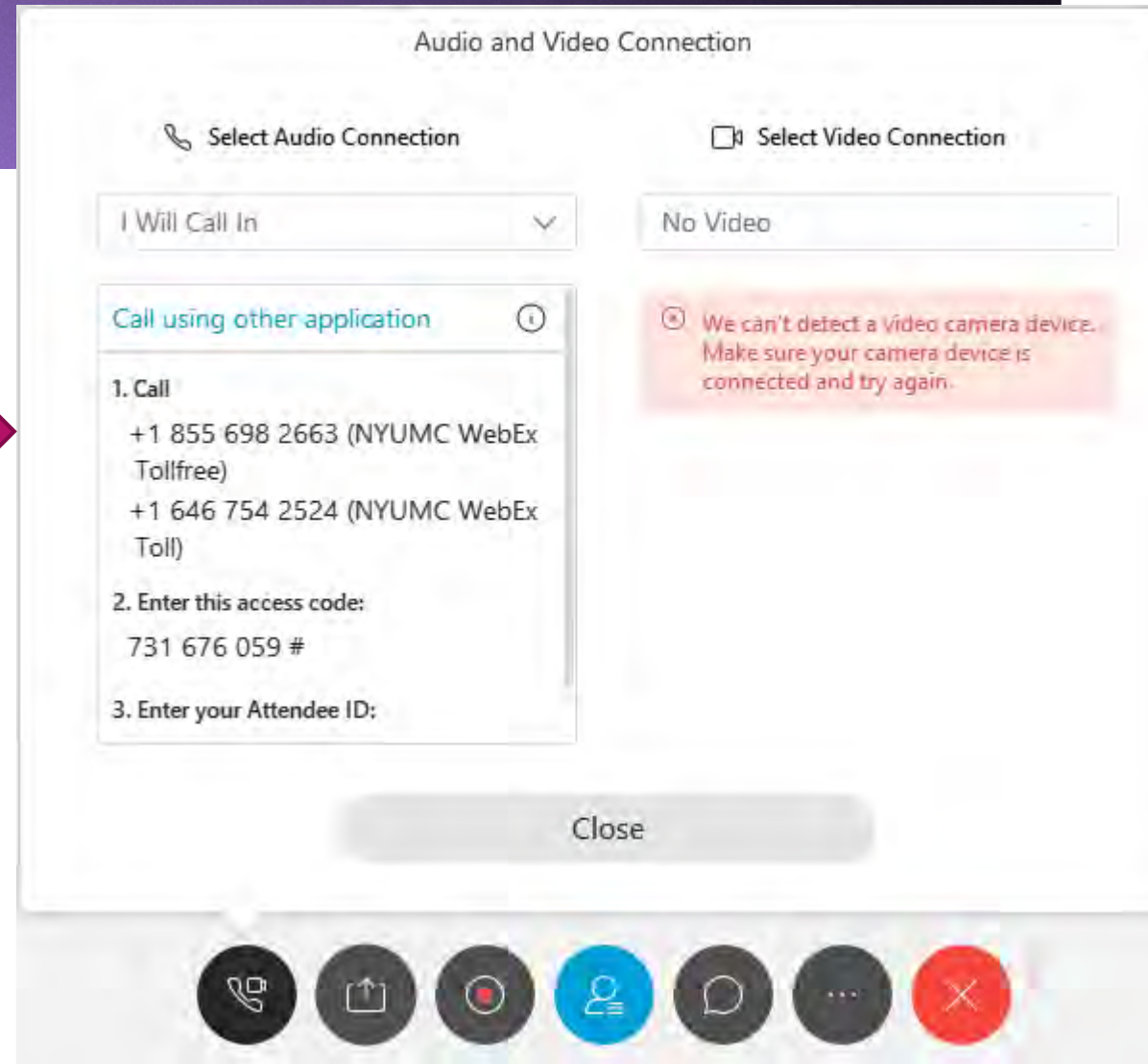
My Personal Room

Schedule a Meeting

Meet Now

My Meetings

My Recorded Meetings

Host: Robert Martin   Edit | Cancel meeting | Add to my calendar

▶ More information

Start   ⟶ Start by browser *NEW!*

Audio and Video Connection

📞 Select Audio Connection   📷 Select Video Connection

I Will Call In   ⌄   No Video

Call using other application   ⓘ   ⊗ We can't detect a video camera device.
                                            Make sure your camera device is
1. Call   connected and try again.
   +1 855 698 2663 (NYUMC WebEx
   Tollfree)
   +1 646 754 2524 (NYUMC WebEx
   Toll)

2. Enter this access code:
   731 676 059 #

3. Enter your Attendee ID:

Close

- ▶ This will open a separate Cisco Webex Meetings Window. Select "Call Me" as your audio connection.

- ▶ Using Telephone audio will improve the performance of your computer, because computer audio requires high-bandwidth internet connection

- ▶ If your Computer has a camera and microphone, you may select them in the popups instead

- ▶ If your Computer lacks a camera, or if you do not want to have audio via the internet, Choose the "Call Me" or "I will Call In" Options

Best Practices for Meetings (courtesy of MCIT)

Follow Best Practices for your Webex Meeting

1. Use a headset when the *Call Using Computer* option is selected in Webex.
   - *Plug in headset and turn on microphone before launching your meeting.*
   - *Then, click* ● *> Audio Connection > Change Settings.*
   - *In the Speaker and Microphone dropdown lists respectively, select your headset.*
   - *To test the speaker audio, click Test (see adjoining image).*
   - *When ready, click OK.*

2. Use the Webex Personal Room for ad-hoc or small meetings.

3. To turn off entry and exit beeps and name announcements of attendees, click Participant and uncheck *Entry and Exit Tone*.
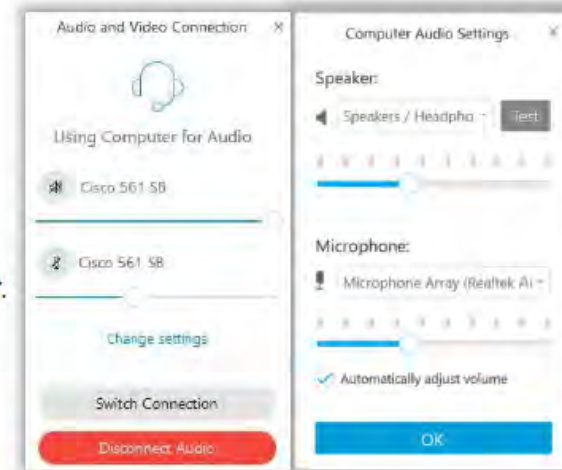
4. **Mute your line** when not speaking, to minimize background noise. To do so, click the microphone button next to your name in the Participants list. To unmute, click the button again.
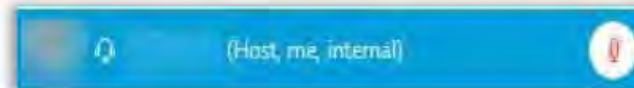
5. **Use the chat window** in the bottom right area of the window to chat with the meeting host, presenter, and other attendees during the meeting.
   - *The Chat section is found in the bottom right part of the screen.*
   - *In case this section is not visible, it can be turned on by clicking* ● *in the Centralized Control Bar.*
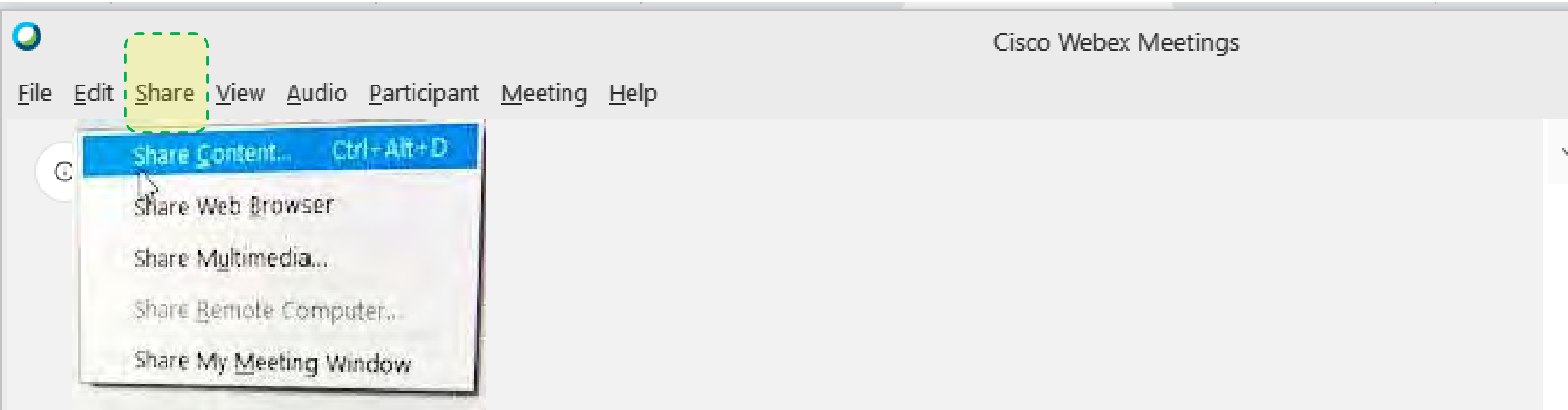
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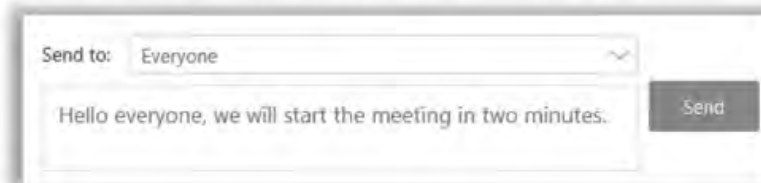
If you intend to record the session for later use (i.e. on-demand), go to Meeting menu> Start Recording
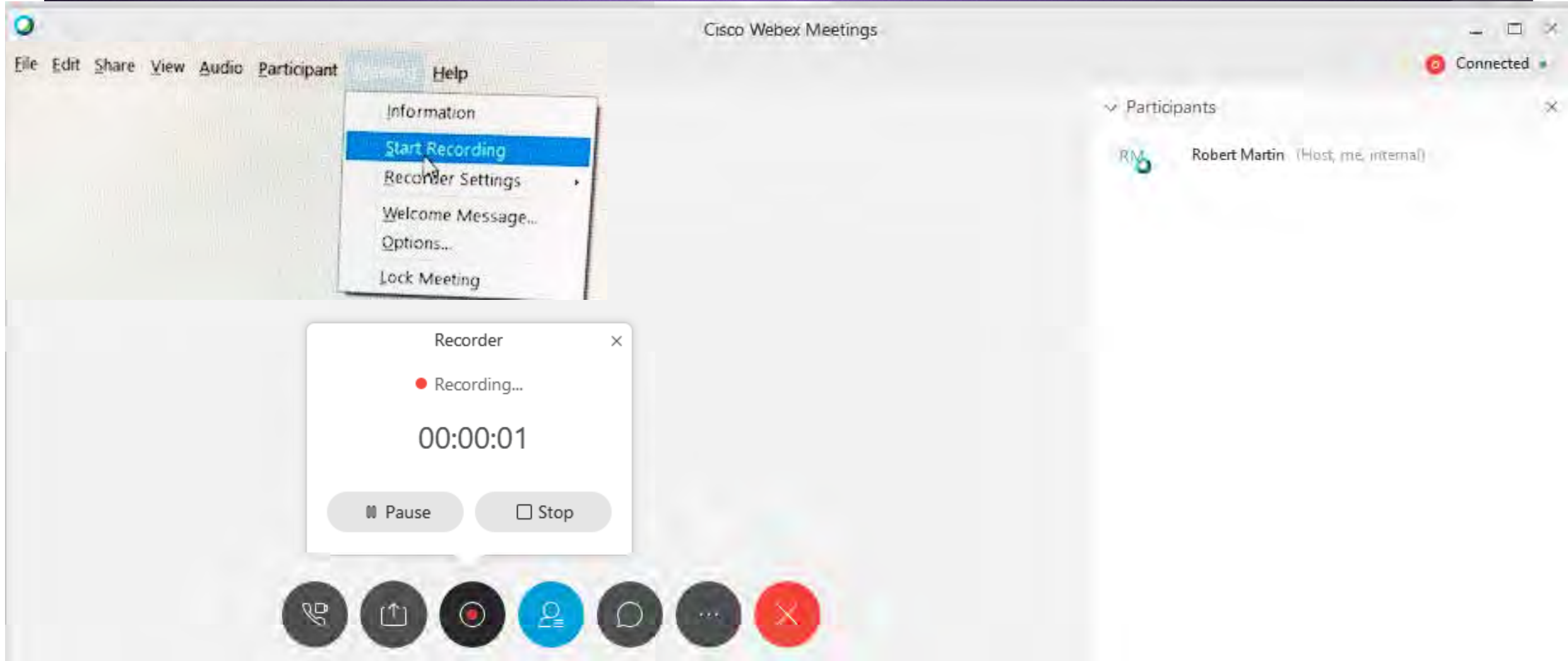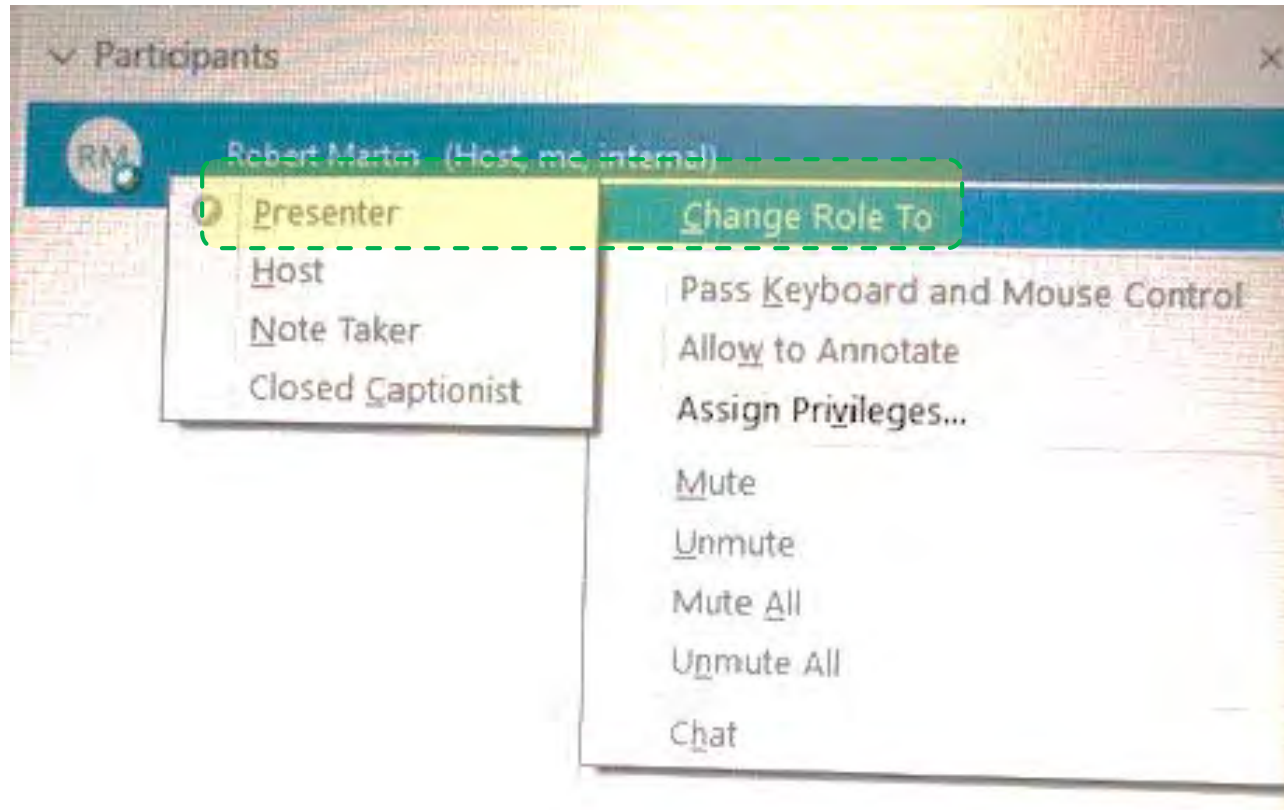
If you wish to share your screen, use the Share menu

▶ Choose to share your whole screen, or only one content window.

To pass screen control to a speaker, Right-Click on his/her name in Participants list then Change Role To -> Presenter

Understanding Webex Roles:

	Host Role	Presenter Role
What is it?	Gives "Backstage" Technical control of the session, including muting for any/all participants	Gives "Onstage" presence of the content, including slides, speaking audio and other windows
Who has it?	**Only one person** can hold the Host role at a time	**More than one person** can have the Presenter role
How assigned?	Scheduler defaults as the Host. Can share the Host Key with others**. Can "Reclaim Host Role" if allowed by current Host.	Scheduler can designate Presenters, or Host can change a Participant to Presenter privileges.

We recommend you **don't share or email the Host Key for most sessions:
the FIRST person to dial in with your Host Key will gain technical control of the session! (If this happens, it may be time-consuming for you to **Reclaim the Host Role**).
- Usually you should Uncheck the box for "Let anyone with a host account… host my meeting" when scheduling your Webex Session

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Taking Audience Questions

Your participants can ask questions several ways:

▶ **Ask Questions via and open audio line (such as phone or computer microphone)**

1. When using this method, **Mute All participants beforehand**, then ask participants to **use the Raise Hand feature** for Questions
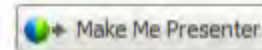
▶ **Ask Questions Via the Chat feature**
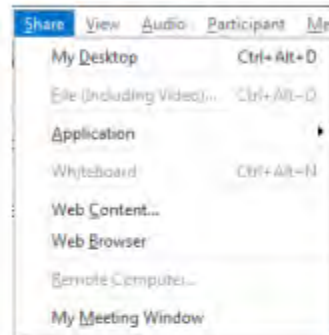
2. Participants can message each other or the host

3. Host can message individuals or the whole group

Sharing your screen

1. Click the **Make Me Presenter** button in order to gain privileges to share content.

2. Click on the **Share** menu item at the top of the window and choose either:
   - **My Desktop > Select Monitor**
   - **Application > Select Application**
   - **Web Browser**

Tip: If you choose to share your entire desktop, it's recommended that you set your screen resolution to 1024x768. Reducing the number of applications running will also provide a better experience for the attendees.

Raising your virtual hand

To gain the attention from the moderator or WebEx presenter use the "raise your hand" feature.

1. Click on the **Raise Hand** button which will place a small hand icon next to your name in the participant list.

2. Click on the **Lower Hand** button to withdraw the request.

If there are many raised hands, the moderator will call on participants in the order in which the requests were received.

Participant Panel Overview

1. Current speaker
2. Full screen video view
3. List of participants
4. Raise hand indicator
5. Turn on/off webcam
6. Mute/un-mute microphone

Learn More and Support

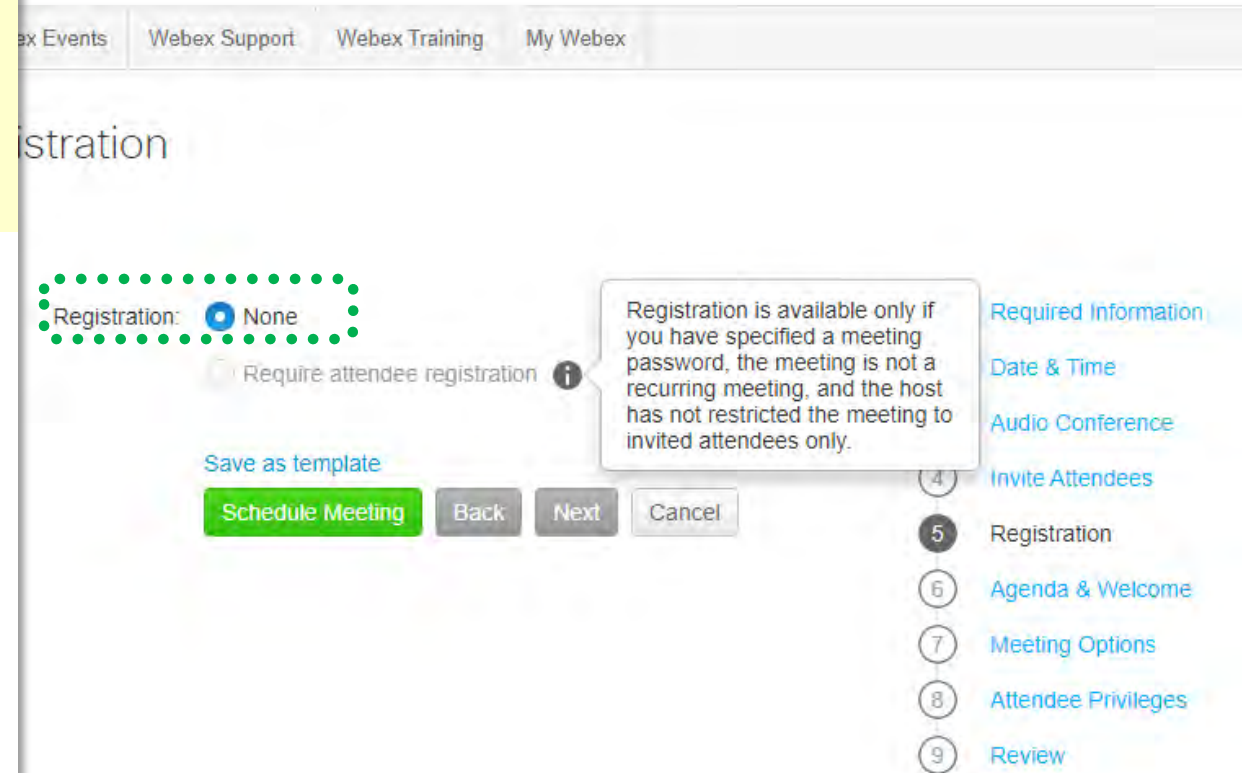You can find additional resources by visiting the Cisco WebEx User Guides section on the WebEx site.

Muting participants (force-muting)

As a Host, you can mute anyone at any time during the meeting or before they join, using the Participants list (your right sidebar). Hosts can mute individual participants or the entire group.

1. To mute or unmute specific people, go to the **Participants** panel, find their name, and select **Mute** or **Unmute** .

2. You can mute everyone at once or as they join the meeting.
   - Muting everyone at once, from the **Participant** menu, select **Mute All** or **Unmute All**.
   - Muting everyone as they join the meeting, from the **Participant** menu, select **Mute on Entry**.

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Attendance-Keeping Considerations for Webex sessions that award CME or CE credit:

▶ **All sessions offering CME/CE/CEU credit** <u>require</u> **attendance-taking**

  ▶ **Protect Hand Hygiene**! <u>Discontinue</u> Pen-and-Paper-based sign-in.

  ▶ We recommend you transition to **paperless e-sign-in** <u>immediately</u> using <u>the Cloud-CME instructions</u> that follow

▶ Usually you **will set "Registration" to "None"**.

  ▶ Using the **"registration" feature disables the "recurring" feature** of your session.

  ▶ If "registration required" sessions are needed, **schedule them as a separate Webex session.**

ex Events   Webex Support   Webex Training   My Webex

istration

Registration: ◉ None

Require attendee registration ⓘ   Registration is available only if you have specified a meeting password, the meeting is not a recurring meeting, and the host has not restricted the meeting to invited attendees only.

Save as template

Schedule Meeting   Back   Next   Cancel

1 Required Information
2 Date & Time
3 Audio Conference
4 Invite Attendees
5 Registration
6 Agenda & Welcome
7 Meeting Options
8 Attendee Privileges
9 Review

Paperless E-Attendance/ E-Sign-In Setup for CME series Coordinators

Pre-requisites For Remote Attendance-taking using **Cloud-CME**

Objective 2:
Demonstrate the mechanisms for "paperless CME attendance" *(a.k.a. E-Sign-In)* for your web-based session

4 ways that promoting learners to E-sign-in can save coordinator's time:

1. E-Sign-in **records the learner's attendance directly and immediately** into CloudCME credit database.

2. **The learner's CME transcript is updated in real time,** and available for their retrieval via self-service 24/7.

3. Coordinators can **discontinue collecting attendance** via paper + Excel sheets for any individuals who use E-Sign-In at a session. *Eliminate scanning/filing/typing.*

4. E-Sign-In **eliminates the 6+ week lag** between hand attendance collection and database updates.

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Paperless CME Attendance is a multi-step process: *Plan ahead!*

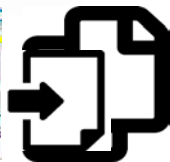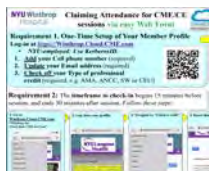**One Time Set-up:** Your **learners MUST prep** their profile 1x** at **https://winthrop.cloud-cme.com**

Before EACH session, the Session Leader or CME Field Agent must:

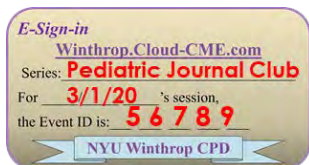1. ****Email the Prep guide** to your learners: **https://bit.ly/33wDtRH**

2. **Look up the Event ID** in Cloud-CME (unique to each session)

3. **Insert the "E-Sign-In How-To" slides** into the meeting slides and display them for your participants

4. **Announce** *during the session* **that e-attendance** is required for credit

5. **Display the E-sign-In Event Seal with Event ID** to attendees **at the end of the session**

1. **Email the One-Time Prep Guide** to your learners:

▶ Download the One-Time Prep Guide here:
https://bit.ly/33wDtRH

▶ Attach it to an email to your learner group

Suggested Announcement for your learners

RE: E-Sign-In for CME has arrived!
The Department of _____ **has transitioned to Paperless CME** attendance for your safety. **We will no longer be signing in for CME credits using paper.**

Before our next meeting of [Series Name Here] on [mm/dd/yy] , please prepare your mobile device for E- Sign-In by following the one-time set-up instructions attached.

E-sign-in is **mandatory for all who desire to claim CME or CE credits**. You can choose to E-Sign-in via Internet or via Texting. Each method will takes about 30 seconds of your time during our sessions.

Regards, Etc.

2. **Look up the Event ID** in Cloud-CME (unique to each session)

▶ In **Winthrop.Cloud-CME.com**, navigate to the Activities Manager (in the Admin area), and search for your event

▶ The Activity ID number in the left column is used as the **E-sign-In Event ID**.

▶ Note: your series has many child-sessions. **Each session's Activity ID is unique,** and will only be accepted from 15 minutes prior to the session start time through 30 minutes after the session end time.

▶ **List the Activity ID in your session slides,** and **include the E-Sign-In Event Badge**

3. Insert the "E-Sign-In How-To" slides into the meeting slides and display them for your participants

▶ **Download these slides here:**
https://bit.ly/3b9MuTn

  ▶ *If needed, also download the E-Sign-In Event Seal*

    https://bit.ly/3di5FMW *and insert it*

▶ **Insert the Event ID** you retrieved in step 2

▶ *Suggestion:* Show the How-To slides at the **end of the session** to save presentation time
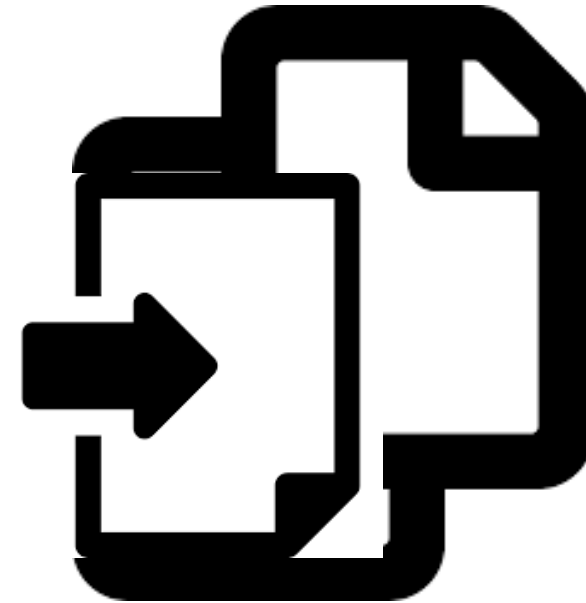
4. Announce *during the session* that E-Sign-In is required for credit

Suggested Announcement for your learners during the session

E-Sign-In for CME has arrived!

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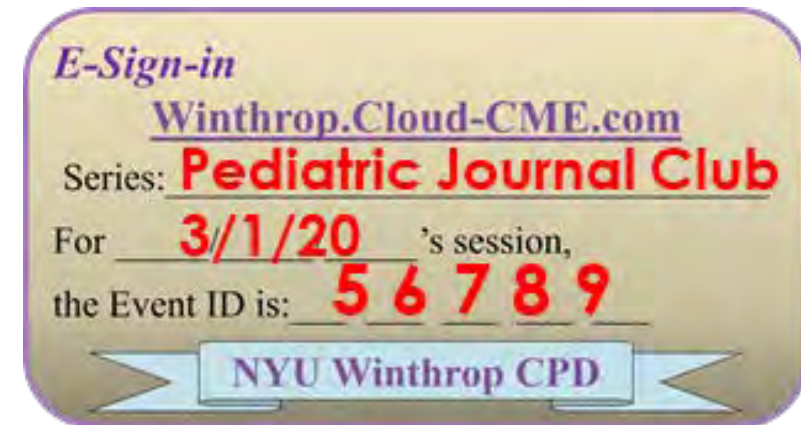
Before the end of today's session, please prepare your mobile device for E- Sign-In by following the one-time set-up instructions shown here. We emailed these to you on __/___/___.

E-sign-in is **mandatory for all who desire to claim CME or CE credits**. You can choose to E-Sign-in via Internet or via Texting. Each method will takes about 30 seconds of your time. At the end of this session, we will display the Event ID you will use to claim your credit.

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5. Display the E-sign-In Seal with Event ID to attendees at the end of your session

▶ **Include and Update the E-Sign-In Event Seal** consistently so that learners can easily find the Event ID

▶ **Verify that you have each session's CORRECT Event ID** displayed, as incorrect ID's will not register credit.

▶ **The Event ID changes daily**, *so beware of copying and pasting* an outdated Event ID.

▶ **Mistakes in displaying the Event ID** will require you to painstakingly reconstruct who attended from memory, in order to log their credit by hand

E-Sign-in
Winthrop.Cloud-CME.com
Series: **Pediatric Journal Club**
For ____**3/1/20**____'s session,
the Event ID is: ____**5 6 7 8 9**____
NYU Winthrop CPD

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Thank you!

- Email the Winthrop CME & CPD Office with questions and feedback.
- WinthropCME@nyulangone.org

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