



CME Boot Camp: New CME portal & RSS Training

July 2017

Please log in to...

<https://northwestern.cloud-cme.com/aph.aspx>

NOTE: this Link is only for training and updating attendance until July 26, 2017. Then use the CME website at <http://www.cme.northwestern.edu/>

Log in using your email and password option...not NM account option. Unless you are a physician or nurse.

CME Boot Camp: New CME portal & RSS Training

- Introductions
- Overview
 - Review the new website
 - Adding activities to calendar
 - Adding speakers to activities
 - Attendance
 - Manually enter in attendance
 - Text attendance



New website & Portal

New website

N Northwestern Medicine
Feinberg School of Medicine

Northwestern Medicine | Northwestern University | Faculty Profiles

Continuing Medical Education

Sign Out Live Courses RSS Calendar Online Courses NM My
Learning Planners About Us Help

My CME Welcome Denise Marshall

Click on CME
to return to
home page.

Once logged
in, you'll see
"My CME".

Once logged
in, name will
appear.

Continuing Medical Education
Promoting excellence and quality through life long learning.



Courses >



CME Application >



My CME >

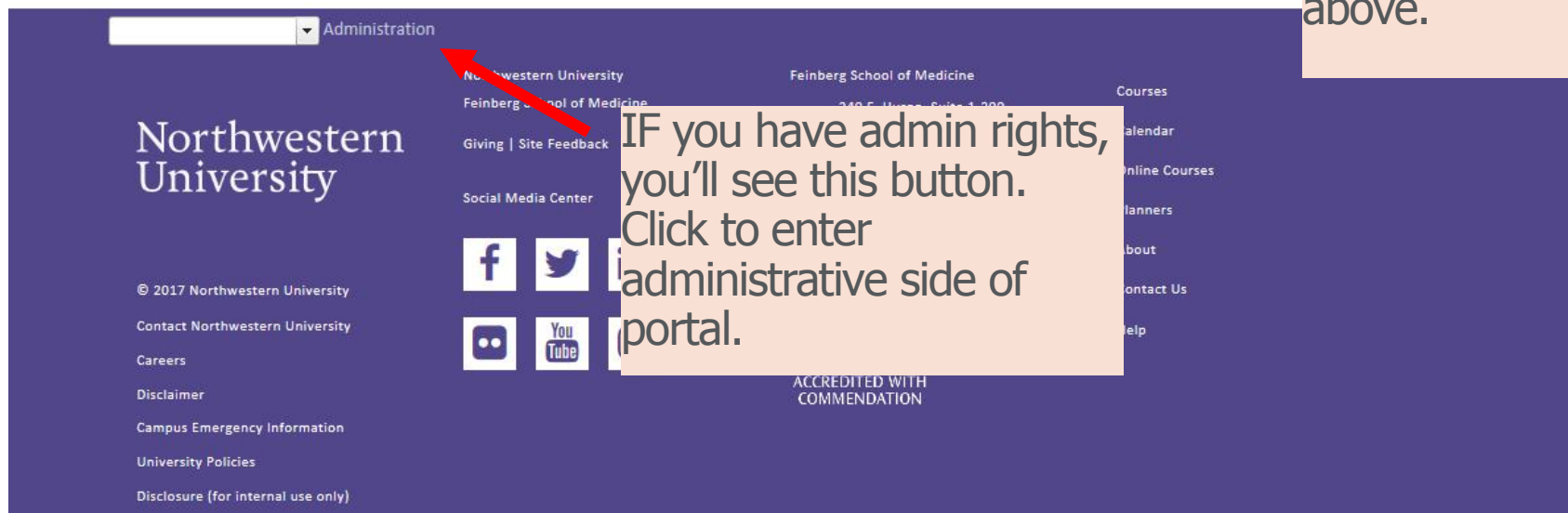
New website



Courses is the same as Live Courses above.

This links to the online CME application.

My CME is the same as the button above.



IF you have admin rights, you'll see this button. Click to enter administrative side of portal.

Administrative portal

The screenshot shows the CloudCME administrative portal. At the top, the CloudCME logo is on the left, and user information 'Denise Marshall', a 'Help' link, and a 'View AP' link are on the right. A red arrow points to the 'View AP' link with the text 'Name will appear when logged in.' Below the header is a 'Dashboard' section with tabs for 'Notifications', 'Course Status', 'Evaluation Status', 'Faculty Status', and 'Application Status'. On the left is a sidebar with 'Home' and 'Activities' links; a red arrow points to 'Activities' with the text 'List of admin. rights'. The main content area displays 'Tweets' from @Cloud_CME, including messages about server issues and a new team member. A red arrow points to the first tweet with the text 'Information from the portal company.' At the bottom left, a sidebar shows various statistics: Logins today (38), Credits awarded today (0), SMS text attendance today (0), QR scans via app today (0), and Registration revenue so far today (\$0.00).

CloudCME
northwestern

Denise Marshall ? Help View AP

Dashboard

Notifications Course Status Evaluation Status Faculty Status Application Status

Quick Stats

Last 24 Hours
Last 30 Days

38 Logins today.

0 Credits awarded today.

0 SMS text attendance today.

0 QR scans via app today.

\$0.00 Registration revenue so far tod...

Tweets by @Cloud_CME

CloudCME Support @Cloud_CME
The CloudCME service is back up and running after a brief restart period. We are diagnosing the cause and examining logs.

CloudCME Support @Cloud_CME
We are investigating an issue on one of our servers. info from our hosting p...

CloudCME Support @Cloud_CME
Jennifer Donnelly has joined our team! A seasoned CME pro, formerly with Healthstream. Read more about her here - [linkedin.com/in/jennifer-do...](https://www.linkedin.com/in/jennifer-donnelly/)

Jennifer Donnelly | LinkedIn
View Jennifer Donnelly's professional profile on LinkedIn. LinkedIn is the world's largest business network, helping professionals like Jennifer Donnelly [linkedin.com](https://www.linkedin.com)

CloudCME Support @Cloud_CME
We will be closed on July 3rd next week in...

Name will appear when logged in.

Information from the portal company.

HELPS is a list of FAQ & webinars about the portal.
Do NOT reach out to the company directly with questions or request for help.
View AP (Attendee Portal) will bring you back to the homepage in a separate window.

Administrative portal – Parent Activity

? Activities Manager (225)

Instructions: To edit and work with a single event that already exists, begin by selecting it from the drop down list. This will result in much faster operations for all edits on that activity. To add a new Activity click Add New Record in the Grid View below.

 ☐ All ☒ Parents Only ?

☒ Hide Inactive ☐ Activity Planning Form Submissions

Activity ID	Calendar	Edit	Deactivate	Copy	QR	Approved	Show In AP	Reg. Active	Registrations	View	Name	Starts	End	Owners	Coordinator
<input type="text"/>	<input type="button" value="v"/>								<input type="text"/>	<input type="button" value="v"/>	<input type="text"/>	<input type="button" value="v"/>	<input type="text"/>	<input type="button" value="v"/>	<input type="text"/>
▼ 20417							<input type="checkbox"/>	<input type="checkbox"/>	0		Department of Medicine Grand Rounds	1/3/2017 7:30:00 AM	1/3/2017 8:30:00 AM	Rana Khalifeh,	

ID	Starts	Ends	Name
<input type="text"/>	<input type="button" value="v"/>	<input type="button" value="v"/>	<input type="button" value="v"/>
55870		5/2/2017 8:30:00 AM	Depar TESTING
55842		4/25/2017 7:30:00 AM	Depar
55816		4/18/2017 7:30:00 AM	Department of Medicine Grand Rounds
55790		4/11/2017 7:30:00 AM	Department of Medicine Grand Rounds
55758	4/4/2017 7:30:00 AM	4/4/2017 7:30:00 AM	Department of Medicine Grand Rounds
55710	3/28/2017 7:30:00 AM	3/28/2017 7:30:00 AM	Department of Medicine Grand Rounds
55652	3/21/2017 7:30:00 AM	3/21/2017 7:30:00 AM	Department of Medicine Grand Rounds
55599	3/14/2017 7:30:00 AM	3/14/2017 7:30:00 AM	Department of Medicine Grand Rounds

Update calendar.

Your activity name.

Administrative portal – Calendar of Child Activities

Activities Manager (225)

Instructions: To edit and work with a single event that already exists, begin by selecting it from the drop down list. This will result in much faster operations for all edits on that activity. To add a new Activity, click Add New Record in the Grid View below.

☐ Hide Inactive ☐ Activity Planning Form Subm

[Add](#) [Export XLS](#) [Refresh](#) [Edit](#)

Activity ID	Calendar	Edit	Deac
20417			

ID	Start
55870	5/2/2017
55842	4/25/2017
55816	4/18/2017
55790	4/11/2017
55758	4/4/2017
55710	3/28/2017
55652	3/21/2017
55599	3/14/2017 7:30:00 AM
55545	3/7/2017 7:30:00 AM

Instructions: The calendar is used for RSS and specifically when you want to deliver an evaluation for a specific RSS date, and / or change the title/topic of a specific date. Click help for more details.

Jul, 2017							Day	Week	Month	Timeline
Sun	Mon	Tue	Wed	Thu	Fri	Sat				
25	26	27 Department of Medicine	28	29	30	1 Jul				
2	3	4 Department of Medicine	5	6	7	8				
9	10	11 Department of Medicine	12	13	14	15				
16	17	18 Department of Medicine	19	20	21	22				
23	24	25 Department of Medicine	26	27	28	29				

Calendar.aspx?EventID=20417

End	Owners	Coordinator
1/3/2017 8:30:00 AM	Rana Khalifeh,	

[Rounds - TESTING](#)

[Rounds](#)

[Rounds](#)

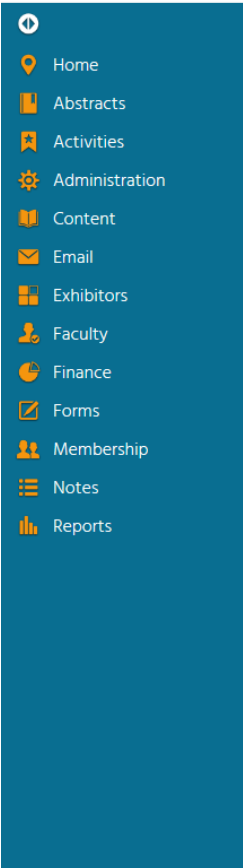
[Rounds](#)

[Rounds](#)

[Rounds](#)

[Rounds](#)

Administrative portal – Updating a Child Activities



Activities Manager (226)

Instructions: To edit and work with a single event that already exists, begin by selecting it from the drop down list. This will result in much faster operations for all edits on that activity. To add a new Activity, click Add New Record in the Grid View below.

☐ All ☒ Parents Only ?

☐ Hide Inactive ☐ Activity Planning Form Submissions

[Add](#) [Export XLS](#) [Refresh](#) [Save Layout](#) [Reset](#)

Activity ID	Calendar	Edit	Deactivate	Copy	QR	Approved	Show in AP	Reg. Active	Registrations	View	Name	Starts	End	Owners	Coordinator
20417						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0		Department of Medicine Grand Rounds	1/3/2017 7:30:00 AM	1/3/2017 8:30:00 AM	Rana Khalifeh,	
ID	Starts		Ends		Name										
55875	5/15/2017 7:30:00 AM		5/15/2017 8:30:00 AM		Department of Medicine Grand Rounds										
55874	5/17/2017 7:30:00 AM		5/17/2017 8:30:00 AM		Department of Medicine Grand Rounds										
55870	5/2/2017 7:30:00 AM		5/2/2017 8:30:00 AM		Department of Medicine Grand Rounds - TESTING										
55842	4/25/2017 7:30:00 AM		4/25/2017 7:30:00 AM		Department of Medicine Grand Rounds										
55816	4/18/2017 7:30:00 AM		4/18/2017 7:30:00 AM		Department of Medicine Grand Rounds										
55790	4/11/2017 7:30:00 AM		4/11/2017 7:30:00 AM		Department of Medicine Grand Rounds										
55758	4/4/2017 7:30:00 AM		4/4/2017 7:30:00 AM		Department of Medicine Grand Rounds										
55710	3/28/2017 7:30:00 AM		3/28/2017 7:30:00 AM		Department of Medicine Grand Rounds										

Click on Child Activity you would like to edit.

Editing the Child Activity

Editing Activity ID: 2531 - New York Society for Neurosurgery - Elsberg Lecture (Date my change from October 26) - Regl...

Basic

Instructions: Most fields on this tab are required. Roll over each field to view a pop up description.

Name: New York Society for Neurosurgery - Elsberg Lecture (Date my change from October 26)

Approval Status: ☐

Type: Jointly Provided - Regularly Scheduled Series

If Joint, Specify Name:

Format: Live Activity

Hours: 3.00 Attendee Max #: 0 FMV \$/Credit Hour: 0

Code: 2531-2527 Class: Account:

Department:

Location: Location TBD City: New York State: NY Country: UNITED STATES

Publishing Options

☐ Registration Form Active ☒ Event Active ☐ Publish Agenda/Syllabus ☐ Show in AP View in AP

Update Cancel

Child Activity Name can be changed here as well.

Download flyer/promotional material here.

EventWizard.aspx?EventID=2531

Editing the Child Activity – downloading flyer

The screenshot shows the 'Activities Manager' interface for editing activity ID 55870. The 'Documents' tab is highlighted with a red box. Below the tabs, there is a section for uploading and managing documents. A callout box points to the 'Documents' tab with the following text:

Download flyer/promotional material under Documents. For the activities you're entering from April – now, add disclosure forms and any content validation forms.

The interface includes a sidebar with navigation options like Home, Abstracts, Activities, Administration, Content, Email, Exhibitors, Faculty, Finance, Forms, Membership, Notes, and Reports. The top right shows the user 'Sheryl Corey' and a 'Help' link.

Helpful Tips about “Child Activity”

- Each child will have its own prefix number (i.e.1111-Parent Number)
- Child Activity is listed under the Parent Activity.
- In the calendar view, a Child Activity will appear with **Ø** in the heading area after it has been initially edited.

10 minutes:

Edit your own child activity

Adding a Speaker to a Child Activity

The screenshot displays the Northwestern Medicine system interface. On the left is a dark blue sidebar with a list of navigation items: Home, Abstracts, Activities, Administration, Content, Email, Exhibitors, Faculty, Finance, Forms, Membership, Notes, and Reports. The 'Faculty' item is highlighted with a red box. An arrow points from this box to a callout box labeled 'Step 1: Click on the Faculty Tab'. In the main content area, the 'Faculty' tab is selected, and the 'Faculty Management' link is highlighted with a red box. Another arrow points from this box to the same 'Step 1' callout. Below the 'Faculty Management' link, a list of options is visible: Faculty Status, Build Agenda, Agenda & Disclosures, Email Final Agendas, Import Faculty, Faculty Presentation Manager, Faculty Presentation COI Resolution, and Faculty History. To the right of this list is a light blue banner with the text 'Select activity from the drop down list below to begin.' Below the banner is a white search bar with a dropdown arrow, followed by checkboxes for 'All' and 'Parents Only' with a help icon. This entire section is enclosed in a red box. An arrow points from this box to a callout box labeled 'Step 2: Select the Child Activity from the drop down menu.'

Step 1: Click on the Faculty Tab

Step 2: Select the Child Activity from the drop down menu.

Adding a Speaker to a Child Activity

Faculty Management

Select Event **Default Forms** New/Assign Faculty to KEEP ACTIVE - MULTIWEB TEST - 39 Email Assign all faculty to a form

Instructions: The faculty forms listed below can be assigned to new faculty automatically, when they are added in the 'Assign Faculty' tab. Check/uncheck the forms as needed. When finished, click Save, then proceed to the 'Assign Faculty' tab.

<input type="checkbox"/> Form ID# 27 - Upload Faculty Bio	<input checked="" type="checkbox"/> 23 - Presentation Release
<input checked="" type="checkbox"/> 21 - Disclosure of Financial Relationships	<input checked="" type="checkbox"/> 38 - Upload Presentation Files
<input type="checkbox"/> Form ID# 165 - Additional Information Request	<input type="checkbox"/> Form ID# 239 - Commercial Employee Attestation

Faculty will have access to the portal for this activity until 11/11/2016 4:00 PM

Save

DISREGARD

Adding a Speaker to a Child Activity

Faculty Management

Select Event Default Forms **View/Assign Faculty to KEEP ACTIVE - MULTIWEB TEST - 39** Email Assign all faculty to a form

Instructions: You can add faculty by typing a few letters of their last name in the faculty lookup field below and then selecting them from the list. To edit the faculty member's assigned forms, profile or add a photo, double-click changes. To select a faculty member to receive an email that you can compose later on the 'Email' tab, select their row, then click the 'Email' tab.

☒ When faculty are added to this activity, create a complimentary registration for them.

Add Faculty Already in CloudCME **Add Faculty Not in CloudCME**

8 Faculty assigned to KEEP ACTIVE - MULTIWEB TEST - 39 - Starts:Wednesday, February 8, 2017, Ends:Sunday, March 12, 2017 , Type:Directly Provided - Courses

Optional: Information entered into this box will appear above the faculty list. You can list out course directors and other faculty who need to be listed with prominence, by adding them in you are not building an agenda, you should add your faculty here instead.

Testing faculty text

	SpeakerID	UserID	Planner	Photo	Full Name	Title	Organization	Disclosure	Assigned Forms	# Presentations	Comments	Honoraria
▶	<input type="checkbox"/>	262			PAUL CARPENTER , OTHER		Multiweb	NO DISCLOSURE	Travel Profile Form INCOMPLETE Availability INCOMPLETE Audio Visual Requirements COMPLETED Form ID# 23 - Presentation Release INCOMPLETE Form ID# 21 - Disclosure of Financial	0		\$0.00

Faculty search area.
Search by Last
Name, First Name.

Adding a Speaker to a Child Activity

Faculty Management

Select Event Default Forms **View/Assign Faculty to KEEP ACTIVE - MULTIWEB TEST - 39** Email Assign all faculty to a form

Instructions: You can add faculty by typing a few letters of their last name in the faculty lookup field below and then selecting them from the list. To edit the faculty member's assigned forms, profile or add a photo, double-click on the row. To select a faculty member to receive an email that you can compose later on the 'Email' tab, select their row, then click the 'Email' tab.

☒ When faculty are added to this activity, create a complimentary registration for them.

Add Faculty Already in CloudCME Add Faculty Not in CloudCME Add New Individual

8 Faculty assigned to KEEP ACTIVE - MULTIWEB TEST - 39 - Starts:Wednesday, February 8, 2017, Ends:Sunday, March 12, 2017, Type:Directly Provided - Courses Preview Faculty List

Optional: Information entered into this box will appear above the faculty list. You can list out course directors and other faculty who need to be listed with prominence, by adding them in the 'Email' tab. If you are not building an agenda, you should add your faculty here instead.

Testing faculty text

	SpeakerID	UserID	Planner	Photo	Full Name	Title	Organization	Disclosure	Assigned Forms	# Presentations	Comments	Honoraria
▶	<input type="checkbox"/>	262	1	<input type="checkbox"/>	PAUL CARPENTER OTHER		Multiweb	NO DISCLOSURE	Travel Profile Form INCOMPLETE Availability INCOMPLETE Audio Visual Requirements COMPLETED Form ID# 23 - Presentation Release INCOMPLETE Form ID# 21 - Disclosure of Financial	0		\$0.00

The activity faculty are being assigned to.

Verify Disclosures have been received.

5 minutes:
Add faculty to your child
activity

Attendance

- Manual entry (similar to old RSS database system)
- Text in attendance

Attendance

The screenshot shows the CloudCME Attendance interface. On the left is a dark blue sidebar with a list of navigation items: Home, Abstracts, Activities, Administration, Content, Email, Exhibitors, Faculty, Finance, Forms, Membership, Notes, and Reports. The 'Activities' item is highlighted with a red arrow pointing to it. In the main content area, the 'Activities' tab is selected, showing a sub-menu with 'Attendance' highlighted. A red arrow points from the 'Attendance' sub-menu item to a callout box. The callout box contains the text: 'Choose Record Attendance under Activities'. Below the callout box, the 'Record attendance' option is visible in the sub-menu. At the top of the main content area, there is a header bar with the text: 'Instructions: Click the help icon for detailed instructions on the use of this screen.' Below this, there is a section with a dropdown menu and two checkboxes: 'All' and 'Parents Only'.

Activities Attendance

Activity Manager
Record attendance
Import an activity
Credit Manager
Online Content / Tests
Activity Grouping
Manage Owners
Manage Credits
Attendee Certificates
Application Reviewers
RSS Dashboard

Instructions: Click the help icon for detailed instructions on the use of this screen.

☐ All ☐ Parents Only ?

Choose Record Attendance under Activities

Attendance

? Record Attendance

Instructions: Click the help icon for detailed instructions on the use of this screen.

TESTING



☐ All ☐ Parents Only ?

Department of Medicine Grand Rounds - **TESTING** - 55870-20417

Attendance Options



Type in the Child Activity

Attendance

Record Attendance (Total:1, Attended:0 No Attendance:1)

Instructions: Click the help icon for detailed instructions on the use of this screen.

Department of Medicine Grand Rounds -

☐ All ☐ Parents Only

Attendance Options

Attendance Options

Activity Options:

Credits this activity awards:

☒ AMA PRA Category 1™

Attendance Date:

5/2/2017



Credit: 1

No credits recorded for this activity yet.

Add Users:

☒ Auto-Award Credits for Added Users

Lookup & Add Existing User: y@northwestern.edu

Add New Attendee To Sys

Bulk Import:



Upload File

Export XLS

Save Attendance

Remove Credits

Remove Attendees

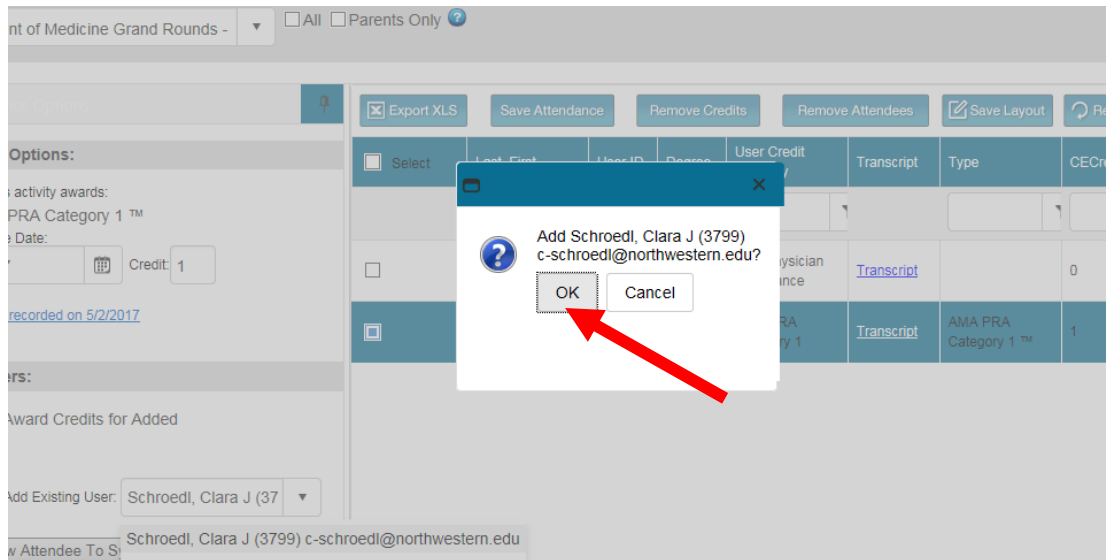
Save Layout

Reset

<input type="checkbox"/> Select	Last, First	User ID	Degree	User Credit Eligibility	Transcript	Type	CECreditCategory	Hours Claimed	Credit Date	
<input type="checkbox"/>	Corey, Sheryl	850		Non-Physician Attendance	Transcript		0	0.00		Remove Credit

Corey, Sheryl (850) sheryl.corey@northwestern.edu

Attendance – adding existing user



Attendance – NOT in system

- Home
- Abstracts
- Activities
- Administration
- Content
- Email
- Exhibitors
- Faculty
- Finance
- Forms
- Membership
- Notes
- Reports

Record Attendance (Total:2, Attended:1 No Attendance:1)

Instructions: Click the help icon for detailed instructions on the use of this screen.

Department of Medicine Grand Rounds - ☐ All ☐ Parents Only ?

Attendance Options

Attendance Options

Activity Options:

Credits this activity awards:

☒ AMA PRA Category 1™

Attendance Date:

5/2/2017 Credit: 1

[Last credit recorded on 5/2/2017](#)

Add Users:

☒ Auto-Award Credits for Added Users

Lookup & Add Existing User:

Add New Attendee To System

Bulk Import:

☐ Select

Export XLS

Save Attendance

Remove Credits

Remove Attendees

Save Layout

Reset

<input type="checkbox"/> Select	Last, First	User ID	Degree	User Credit Eligibility	Transcript	Type	CECreditCategory	Hours Claimed	Credit Date
<input type="checkbox"/>	Corey, Sheryl	850		Non-Physician Attendance	Transcript		0	0	
<input checked="" type="checkbox"/>	Didwania, Aashish	6170	MD	AMA PRA Category 1	Transcript	AMA PRA Category 1™	1	1.00	5/2/2017

If not in system, click add new attendee.

Attendance- Text attendance benefits

- Attendees will attest to attending by texting a code specific to that day's activity session OR a general code for that activity.
- Credits are awarded immediately allowing transcripts will be up to date.
- Course coordinator no longer manually adding attendance.

Recording Attendance

- Text attendance code to 312-957-8301
- If attendee does not have their cell phone number on file, a text message will be sent back instructing them on how to update their profile.
- Attendance code is only good for that specific activity date.
- Attendees have 15 minute prior to the activity and 1 hour after the activity to submit the code.

Remaining time:

Add attendance to your child
activity

Thank You