



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

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.



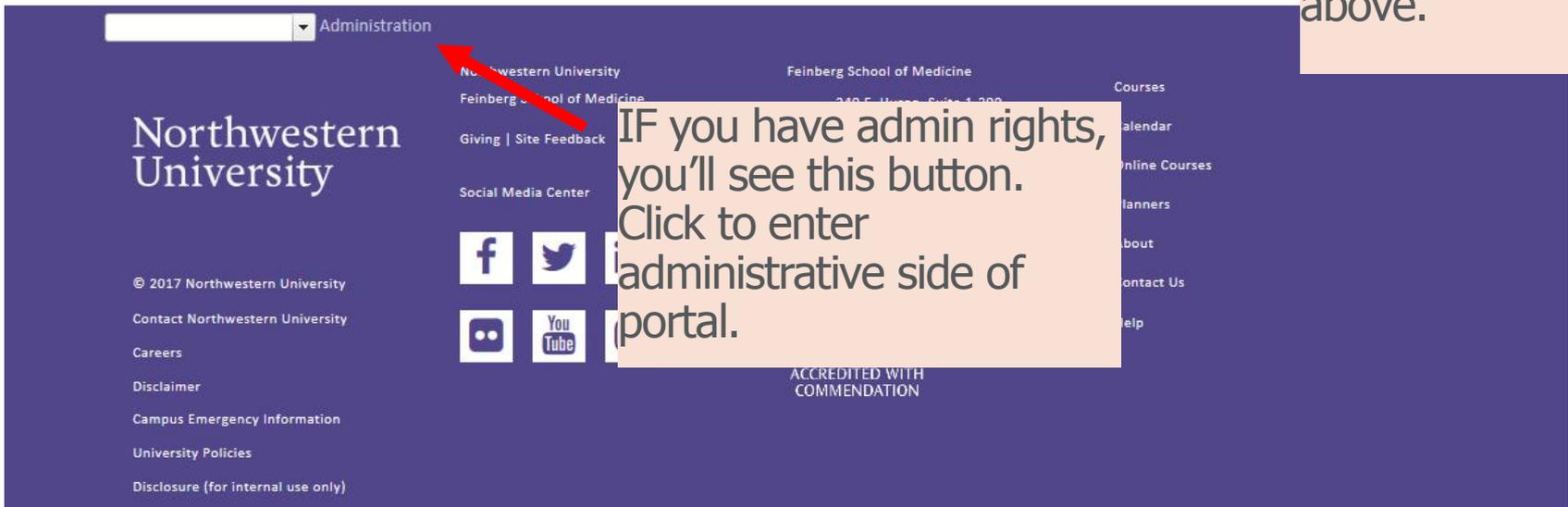
New website



Courses is the same as Live Courses above.

This links to the online CME application.

My CME is the same as the button above.



Administrative portal

The screenshot shows the CloudCME administrative portal. At the top right, there is a user profile for Denise Marshall, a Help icon, and a View AP icon. A red arrow points to the View AP icon with the text: "Name will appear when logged in." Below the header is a navigation bar with "Dashboard" and tabs for "Notifications", "Course Status", "Evaluation Status", "Faculty Status", and "Application Status". On the left is a sidebar with "Home" and "Activities" (indicated by a red arrow and the text "List of admin. rights"). The main content area features a "Tweets" section with several tweets from @Cloud_CME. A red arrow points to the first tweet with the text: "Information from the portal company." Below the tweets is a "Quick Stats" section with various metrics: 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). At the bottom left is the Northwestern Medicine logo.

Name will appear when logged in.

Information from the portal company.

HELP 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
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
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.

↩ ↻ - □ ×

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.

today
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

Activity ID	Calendar	Edit	Delete	
20417				
ID	Start	End	Owners	Coordinator
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	3/14/2017 7:30:00 AM	Department of Medicine Grand Rounds	
55545	3/7/2017 7:30:00 AM	3/7/2017 7:30:00 AM	Department of Medicine Grand Rounds	

Administrative portal – Updating a Child Activities

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

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"/>	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) - Regi...

Basic Description Dates Banners/Brochures Credits & Sessions Objectives Specialties Registration Support
Accreditation Sponsors Hotel Misc. Outcomes Gap Analysis ABMS/ACGME Institute of Medicine
Inter-professional Education Collaborative Other Competencies Documents Budget Owners, Administrators, Coordinators Comments & Notes MOC

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 S/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 'Editing Activity' interface for ID 55870. The 'Documents' tab is highlighted with a red box. Below the tabs, there is an 'Upload' section with a file list table. The table has columns for 'Filename' and 'Size'. The current view shows 'No records to display.' 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.

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 \emptyset 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 shows a web application interface with a sidebar menu on the left and a main content area. The sidebar menu includes items like Home, Abstracts, Activities, Administration, Content, Email, Exhibitors, Faculty, Finance, Forms, Membership, Notes, and Reports. The 'Faculty' item is highlighted with a red box. The main content area has a 'Faculty' tab selected, and a dropdown menu is open, showing a list of activities. The dropdown menu is also highlighted with a red box. Two text boxes with arrows provide instructions: 'Step 1: Click on the Faculty Tab' points to the 'Faculty' tab, and 'Step 2: Select the Child Activity from the drop down menu.' points to the dropdown 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.

- Form ID# 27 - Upload Faculty Bio
- 23 - Presentation Release
- 21 - Disclosure of Financial Relationships
- 38 - Upload Presentation Files
- Form ID# 165 - Additional Information Request
- Form ID# 239 - Commercial Employee Attestation

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

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 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			PAUL CARPENTER, OTHER		Multiweb	NO DISCLOSURE	Travel Profile Form INCOMPLETE Availability INCOMPLETE Audio Visual Requirments 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.

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 navigation icons and labels: Home, Abstracts, Activities, Administration, Content, Email, Exhibitors, Faculty, Finance, Forms, Membership, Notes, and Reports. The 'Activities' menu item is highlighted with a red arrow pointing to the 'Record attendance' option in the main content area. Another red arrow points from the 'Record attendance' option to a callout box. The callout box is a white rectangle with a black border containing the text 'Choose Record Attendance under Activities'. The main content area has a light gray header with the title 'Attendance' and a sub-header 'Record attendance'. Below this is a section with a dropdown menu and radio buttons for 'All' and 'Parents Only'. A faint instruction reads: 'Instructions: Click the help icon for detailed instructions on the use of this screen.'

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

The screenshot shows a software interface for managing attendance. A dialog box is open in the center, asking to add an existing user. The dialog text is: "Add Schroedl, Clara J (3799) c-schroedl@northwestern.edu?". Below the text are two buttons: "OK" and "Cancel". A red arrow points to the "OK" button. In the background, a table is visible with columns: "Select", "Last First", "User ID", "Degree", "User Credit", "Transcript", "Type", and "CE Credit". The "Add Existing User" dropdown menu is set to "Schroedl, Clara J (37)". Below the table, the "Add Attendee To" field is also set to "Schroedl, Clara J (3799) c-schroedl@northwestern.edu".

Select	Last First	User ID	Degree	User Credit	Transcript	Type	CE Credit
<input type="checkbox"/>					Transcript		0
<input type="checkbox"/>					Transcript	AMA PRA Category 1™	1

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:

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

Add Users:

Auto-Award Credits for Added Users

Lookup & Add Existing User:

Bulk Import:

<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