CME Bootcamp: Cloud CME for Conference Course Coordinators
December 2017

Presented by: Sheryl Corey, Jennifer Banys & Allison McCollum
Introductions

- Rhea Alexis Banks (RSS Coordinator)
- Jennifer Banys (Senior Associate Administrator)
- Sheryl Corey (CME Director)
- Allison McCollum (Senior Associate Coordinator)
- Clara Schroedl (CME Medical Director)
Agenda

- Overview of new website
- New application
- Disclosures
- Adding in attendance
- Evaluation
- Offerings & the future of the CME Portal
**New website**

Once logged in, you’ll see “My CME” and your name.

Click on CME to return to home page.

Planners tab has resources and templates.
CME application

Instructions: Complete the various sections of the application and scroll to the bottom of each form and click Save. Note that you will need the email addresses of any planners/faculty you identify in the application. The forms can be edited as needed until all required information is entered. When finished, click the 'Submit For Review' button to send it for peer review and possible approval. Review times vary and you will be contacted via email.

Admin User Lookup: [Dropdown]
- Hide Approved
- Hide Submitted

<table>
<thead>
<tr>
<th>ACTIVITYID</th>
<th>ACTIVITY NAME</th>
<th>AUTHOR</th>
<th>LAST REVISED</th>
<th>DISCLOSURE STATUS</th>
</tr>
</thead>
</table>

[New Application Button]

Start a new CME application
<table>
<thead>
<tr>
<th>Disclosures Required</th>
<th>Copy</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>Caroline Mills, MD does not have a disclosure on file.</td>
<td>Disclosures Required</td>
<td>Copy</td>
</tr>
<tr>
<td>All disclosures on file.</td>
<td>Submit For Review</td>
<td>Copy</td>
</tr>
<tr>
<td>All disclosures on file.</td>
<td>Activity Submitted</td>
<td>Copy</td>
</tr>
</tbody>
</table>

Northwestern Medicine®
Feinberg School of Medicine
CME application

Multiple tabs

- **Basics**
- Planning & Faculty
- Documents
  - Faculty spreadsheet
  - Budget
  - Agenda
- Signature

Instructions: Complete the various sections of the application and scroll to the bottom of each form and click Save. Note that you will need the email addresses of any planners/faculty you identify in the application. The forms can be edited as needed until all required information is entered. When finished, click the "Submit for Review" button to send it for peer review and possible approval. Review times vary and you will be contacted via email.
CME application

Multiple tabs

- **Basics**
- Planning & Faculty
- Documents
  - Faculty spreadsheet
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- Signature

Choose “Save and Continue” to advance to the next tab.
CME application

**Multiple tabs**
- Basics
- **Planning & Faculty**
- Documents
  - Faculty spreadsheet
  - Budget
  - Agenda
- Signature

Add email address then hit “tab”.
Will auto populate name and degree and whether they have a disclosure form on file.
If you add an email address and tab and nothing comes up for *internal faculty*, then it’s the wrong email on file. If this happens, hit the red circle to delete.
If you add an email address and tab and nothing comes up for *external faculty*, then doing this will make them a profile on our system.

<table>
<thead>
<tr>
<th>Email Address</th>
<th>Committee Member Full Name</th>
<th>Degree and Credentials</th>
<th>Institution</th>
<th>Role on Committee</th>
<th>Disclosure</th>
</tr>
</thead>
<tbody>
<tr>
<td>c-schroedl@northwest</td>
<td>Clara Schroedl, MD</td>
<td>MD</td>
<td>FSM</td>
<td>Course I</td>
<td></td>
</tr>
<tr>
<td><a href="mailto:jbarsuk@nm.org">jbarsuk@nm.org</a></td>
<td>Jeffrey Barsuk</td>
<td>MD, MS</td>
<td>FSM</td>
<td>Planning</td>
<td></td>
</tr>
<tr>
<td><a href="mailto:lwilliam@nm.org">lwilliam@nm.org</a></td>
<td>Lisa Williams</td>
<td>MS, APN-CNS, NM</td>
<td>Planning</td>
<td></td>
<td></td>
</tr>
<tr>
<td>dwayne@northwestern</td>
<td>Diane B Wayne, MD</td>
<td>MD</td>
<td>Planning</td>
<td>Disclosure</td>
<td></td>
</tr>
</tbody>
</table>
CME application

Multiple tabs
  • Basics
  • Planning & Faculty
  • Documents
    - Faculty spreadsheet
    - Budget
    - Agenda
  • Signature

Documents needed:
  • Faculty speaker list with disclosure information – template under “Planner” tab
  • Budget – template under “Planner” tab
  • Agenda
  • Additional supporting documentation for application
CME application

Multiple tabs
• Basics
• Planning & Faculty
• Documents
  - Budget
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• Signature
CME application

Multiple tabs
- Basics
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Disclosure Forms
Who should complete the disclosure form?

- Course Director(s)
- Planning Committee Member(s)
- Faculty / Presenters
In other words…

anyone who has influence over the educational content of the activity.
Where can I find the disclosure form?

The most direct way to access the disclosure form is from the CME website:

www.cme.northwestern.edu
Continuing Medical Education
Promoting excellence and quality through lifelong learning.
Scroll to the bottom of the home page:
Alternatively, you can share the direct link:

https://northwestern.cloud-cme.com/Form.aspx?FormID=58
There’s A Cheat Sheet!

Use the cheat sheet to help your Course Directors, Planners and Faculty login and find the disclosure form.

Yes, you can share it with them.
Disclosure of Relevant Financial Relationships for Continuing Professional Education

As a provider approved by the Accreditation Council for Continuing Medical Education (ACCME), Northwestern University Feinberg School of Medicine (NUFSM) requires written, signed disclosure of the existence of relevant financial relationships with industry from any individual in a position to control the content of a CME activity sponsored by NUFSM. Individuals who refuse to disclose relevant financial relationships or refuse to attest to the statements at the end of this form will be disqualified from all aspects of associated CME activities.

Please complete the information below, and then scroll to the bottom of the screen and click Submit. Note that any red highlighted items are required fields and the form cannot be submitted without an answer.

A commercial interest, as defined by the ACCME, is any entity producing, marketing, re-selling, or distributing healthcare goods or services consumed by, or used on, patients. The ACCME does not consider providers of clinical service directly to patients to be commercial interests.

Relevant financial relationships are those in which an individual (including spouse/domestic partner) has both:

1. A personal financial relationship (any amount) with a commercial interest in the past 12 months (whether relationship has ended or is currently active) AND

2. Control in planning or presenting educational content addressing specific products/agents/devices of the commercial interest (not simply a whole class of products or content about the whole disease class)

*Within the past 12 months, have you and/or your spouse or life partner received support from, or had a relationship with, a commercial interest?*

- Yes, I or my spouse/life partner have at present and/or have had within the past 12 months a relevant financial relationship with a commercial interest as listed below.
- No
ATTESTATION OF CE VALUE STATEMENTS

Please indicate your understanding of and willingness to comply with each statement below. If any statements do not apply to your participation in this activity, please select N/A. If you require clarification of these statements or have questions regarding your ability to comply, please contact us immediately.

I have disclosed all relevant financial relationships and I will disclose this information to learners. *
- Agree
- Disagree
- N/A

The content and/or presentation of the information with which I am involved will promote quality or improvements in health care and will not promote a specific proprietary business interest of a commercial interest. Content for this activity, including any presentation of therapeutic options, will be balanced, evidence-based and commercially unbiased. *
- Agree
- Disagree
- N/A

I have not and will not accept any honoraria, additional payments or reimbursements directly from a commercial interest for my participation in this activity. *
- Agree
- Disagree
- N/A

I understand that my presentation/content may need to be reviewed prior to this activity, and I will provide educational content and resources in advance as requested. *
- Agree
- Disagree
- N/A

If I am providing recommendations involving clinical medicine, they will be based on evidence that is accepted within the profession of medicine as adequate justification for their indications and contraindications in the care of patients. All scientific research referred to will conform to the generally accepted standard of experimental design, data collection and analysis. *
- Agree
- Disagree
- N/A

If I am discussing specific healthcare products or services, I will use generic names to the extent possible. If I need to use trade names, I will use trade names from several companies when available, and not just trade names from any single company. *
- Agree
- Disagree
- N/A
If I am discussing any product use that is off label, I will disclose that the use or indication in question is not currently approved by the FDA. *

If I have been trained or utilized by a commercial interest or its agent as a speaker (e.g. speaker's bureau) for any commercial interest, the promotional aspects of that presentation will not be included in any way with this activity. *

If I am presenting research funded by a commercial interest, the information presented will be based on generally accepted scientific principals and methods, and will not promote the commercial interest of the funding company. *

My signature below indicates that I have read and completed this form myself and to the best of my ability provided current and accurate information. I am aware that financial disclosure information provided in this form will be shared with learners prior to their engagement in this CME/CE activity.

Signature Image

Date *

Please review your responses above to make sure all required fields (indicates required) are completed before continuing.
If the person has no relationships to disclose...

• Click No

• Click Agree, Disagree or N/A for the remaining questions

• Sign and date at the bottom

• Click Submit

• ALL DONE!
But what if they have relationships to disclose?!?!
Within the past 12 months, have you and/or your spouse or life partner received support from, or had a relationship with, a commercial interest?

- Yes. I or my spouse/life partner have at present and/or have had within the past 12 months a relevant financial relationship with a commercial interest as listed below.
- No

Please specify your relationship:

<table>
<thead>
<tr>
<th>Type of Financial Relationship</th>
<th>Indicate Applicable Manufacturer</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Relationship, If other:

Manufacturer, If other:

Relationship Status: Current or date ended
### Types of Financial Relationships

<table>
<thead>
<tr>
<th>Type of Financial Relationship</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salary</td>
</tr>
<tr>
<td>Royalty</td>
</tr>
<tr>
<td>Receipt of Intellectual Property Rights/Patent Holder</td>
</tr>
<tr>
<td>Consulting Fee</td>
</tr>
<tr>
<td>Speakers Bureau</td>
</tr>
<tr>
<td>Fees for Non-CE Services Received Directly from a Commercial Interest or its Agent</td>
</tr>
</tbody>
</table>

<table>
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<tr>
<th>Type of Financial Relationship</th>
</tr>
</thead>
<tbody>
<tr>
<td>Receipt of Intellectual Property Rights/Patent Holder</td>
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<td>Speakers Bureau</td>
</tr>
<tr>
<td>Fees for Non-CE Services Received Directly from a Commercial Interest or its Agent</td>
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<tr>
<td>Contracted Research</td>
</tr>
<tr>
<td>Ownership Interest</td>
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<tr>
<td>Other</td>
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</table>
## Applicable Manufacturer

<table>
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<th>Manufacturer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other</td>
</tr>
<tr>
<td>3F Therapeutics</td>
</tr>
<tr>
<td>3M</td>
</tr>
<tr>
<td>Aastrom Biosciences, Inc.</td>
</tr>
<tr>
<td>Abbott Laboratories</td>
</tr>
<tr>
<td>Abbott Vascular</td>
</tr>
<tr>
<td>Abiomed, Inc.</td>
</tr>
<tr>
<td>Abt. Associates</td>
</tr>
</tbody>
</table>

[Image of a dropdown menu with the above list]
Within the past 12 months, have you and/or your spouse or life partner received support from, or had a relationship with, a commercial interest?

- Yes. I or my spouse/life partner have at present and/or have had within the past 12 months a relevant financial relationship with a commercial interest as listed below.
- No

Please specify your relationship:  

Type of Financial Relationship:  

Indicate Applicable Manufacturer:  

Relationship, If other:  

Manufacturer, If other:  

Relationship Status: Current or date ended:  

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More than one relationship? ADD MORE ROWS!

**Please specify your relationship:**

<table>
<thead>
<tr>
<th>Type of Financial Relationship</th>
<th>Indicate Applicable Manufacturer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relationship, If other:</td>
<td>Manufacturer, If other:</td>
</tr>
<tr>
<td>Relationship Status: Current or date ended</td>
<td></td>
</tr>
</tbody>
</table>
Once they have added all financial relationships...

- Click Agree, Disagree or N/A for the remaining questions
- Sign and date at the bottom
- Click Submit
- ALL DONE!
Accessing disclosure forms for your activity

From the Home Screen, click on Administration at the bottom of the page:
CLOUD CME Administration Home page
You can now look for any disclosure form either by Activity or by the person’s last name.

**Faculty Disclosures**

Instructions: Select an activity from the drop down list. Alternately, you can look up an individual by last name and if a disclosure has been submitted, it will display in the report. The report may take a minute to create. Please be patient. When finished you can export the report to several formats including PDF.

Activity: [Select]

Individual: [Select]  □ All  □ Parents Only

[Create Report]
Searching By Activity

• Begin typing the name of the activity in the box.
• Choose the correct activity from the drop down options
• Click Create Report (you’ll see a small pop up window indicating the progress of loading your report)
Searching By Activity

Once complete, you will be able to download/ print the PDFs of all the submitted disclosures associated with this activity.
Searching By Individual

• Begin typing the person’s last name in the box.
• Choose the correct person from the drop down
• Their disclosure will appear (but only if they completed one!)

Disclosure of Relevant Financial Relationships for Continuing Professional Education

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Please complete the information below, and then scroll to the bottom of the screen and click Submit. Note that any red highlighted items are required fields and the form cannot be submitted without an answer.
Another way to view Faculty and their disclosure is by going to Faculty → Faculty Management and searching by Activity. This will be covered more in depth during our next training.
Any Questions?
Recording Attendance
Online registration for your activity through the Cloud CME portal is a service that the Office of Continuing Medical Education can now provide (for an additional fee). Please ask your CME coordinator for details!
Recording Attendance – An Overview

Attendance can be recorded via the Activities ➔ Record Attendance Screen
Recording Attendance – An Overview

You will now be at the main record attendance page:

Instructions: Click the help icon for detailed instructions on the use of this screen.
Recording Attendance – An Overview

Begin by typing the name of your activity (using the unique identifier) to select it from the dropdown menu. Click on the activity to select it:
Recording Attendance – An Overview

The screen will then reload with details specific to your activity and the existing roster for the activity:
Recording Attendance - Overview

NOTE: Both PRA Category 1™ and Non-Physician Attendance credits should be selected; AAFP will not be an available option.
Recording Attendance – Non-Cloud CME Registration

If registration was NOT done via Cloud CME, there will be no records to display, and attendees will need to be added manually.
Recording Attendance – Adding Non-Cloud CME Users

Step 1: Determine if your attendee is already in the system by typing in the last name under “Lookup & Add Existing User”.

![Add Users Interface](image-url)
Recording Attendance – Adding Non-Cloud CME Users

Step 2: If they are in the system, select their name from the drop down menu and click “OK”.

[Image of a user interface with a dropdown menu and options for adding users, including email addresses.]
Recording Attendance – Adding Non-Cloud CME Users

Step 3:
A second pop-up box will appear confirming; click “OK”. The individual has now been added to your activity attendance roster.
Recording Attendance – Adding Non-Cloud CME Users

If they are NOT in the system, add new attendee by checking “Add New Attendee To System”. You will need their first name, last name, degree and email address.
Recording Attendance – Adding Non-Cloud CME Users

Step 2:
A pop-up box will appear. Enter the required information and click “Create New Attendee”.

*For Credit eligibility, you will either select AMA PRA Category 1 (MD/DO) or Non-Physician Attendance (all others).
Recording Attendance – Adding Non-Cloud CME Users

Your user will now appear on the attendance roster, highlighted in **blue**.
Recording Attendance – Cloud CME Users

For those individuals already in the system from online registration through Cloud CME, they will NOT be highlighted (see below). Only those highlighted in blue can view the syllabus and evaluation.

Step 1: All attendees must be highlighted in blue to complete their evaluation.

You will need to check/highlight the row of the attendee (make sure no one else is highlighted as to not change the other learners’ credits).
Step 2: Change the number of credits to “0”.

*Please note: If you will not be requiring your attendees to complete an evaluation in order to get CME credit (i.e., you will be entering the credits directly), you can leave the number of credits as is – you do not need to change to “0”.*
Recording Attendance – Cloud CME Users

Step 3: click “Save Attendance”.

![Screenshot of Cloud CME interface showing save attendance feature]
Recording Attendance – Adding Users

Step 4:
In this example, Mr. Wilkens row will turn **blue**, and his credits will read “0”. Once he goes into his evaluation, he’ll be able to update the number of hours for which he participated.
QUESTIONS?
Evaluations

*Can now be done online via Cloud CME!*
There are 2 evaluation templates currently available:

• Basic evaluation  (*strongly recommended*)
  - Participants can claim credits and answer all the CME required questions

• Extended evaluation
  - Same as above plus...
  - Includes each presentation & speaker for evaluation
Things to know:

• Using the evaluation via Cloud CME is not currently required...although we strongly recommend it.

• If you wish to use the online evaluation, simply communicate to your coordinator which template you want to use and they will set it up for you.
  - Using the extended evaluation will require that you first add your complete agenda with speakers into Cloud CME.

• Once the eval is connected to your program, you are responsible for management, downloading reports, etc.
To access Evaluation Reports start from the CLOUD CME administration home page.
Search by Activity name

Evaluation Results

Instructions: Select an activity. Charts will display along with corresponding tabular data below the chart. To jump to a question, click its title in the question list on the left side of the screen. To hide/display a question check/uncheck its checkbox.

move

- 1.19.17 - Neurology Clinical Case Conference - Movement Disorders - FSM 5200
- New Frontiers in the Diagnosis and Management of Movement Disorders and Dementias - 1
- 8.31.17 Clinical Case Conference - Movement Disorders - FSM 5200

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The Chart Results report is the first report you will see:
Next is the Data Report:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>Event Date</td>
<td></td>
</tr>
<tr>
<td>Name</td>
<td>Event Name</td>
<td></td>
</tr>
</tbody>
</table>

**NOTE TO DESIGNER**

**IMPORTANT INFORMATION REGARDING EVALUATION FORMS**

In order for evaluation forms to report properly and function properly please ensure to follow these rules:

1. All controls on the form **MUST** have BOTH a unique LABEL and LABEL value.
Downloaded Data report shows in an Excel Spreadsheet:

<table>
<thead>
<tr>
<th>FormSubCreated</th>
<th>CreatedLSThChange</th>
<th>Full Name</th>
<th>ElementN</th>
<th>LastName</th>
<th>LastFirst</th>
<th>FormID</th>
<th>EventID</th>
<th>NoteToDet</th>
<th>eventdetail</th>
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<th>Event</th>
</tr>
</thead>
<tbody>
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<td>J. Smith</td>
<td></td>
<td></td>
<td></td>
<td>104</td>
<td>56402</td>
<td>&lt;b&gt;NOTE&lt;/b&gt;</td>
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<td>End of sec</td>
<td>You can</td>
<td>1</td>
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<td>56402</td>
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* Northwest Medicine
  Feinberg School of Medicine
See who hasn’t completed the evaluation...

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...and send them an email!

To: (FullName),

Your evaluation for {ActivityName}, 56402 is incomplete. To complete the evaluation and receive credit click this link, and sign in. Once signed in, click the pink "My CME" button to the right, select "Evaluations & Certificates", and click the complete evaluation button for this activity.

Your login details: {LoginDetails}
Change the Full Name field to **your** name!

The email address cannot be changed.

This should autofill to your email.

To: {FullName},

Your evaluation for {ActivityName}. 56402 is incomplete. To complete the evaluation and receive credit [click this link](#), and sign in. Once signed in, click the pink "My CME" button to the right, select "Evaluations & Certificates", and click the complete evaluation button for this activity.

Your login details: [LoginDetails]
Any questions?
CME Offerings & the future of the CME portal

The Office of CME fees:

• No increase in Application or Administrative fees to FY 2018
• “Per certificate” now “Per participant”
CME Offerings & the future of the CME portal

The Office of CME Offerings:

- Online registrations through the CME Portal
- Grant submission
- Exhibitor management
- Printing of name badges
- Onsite staffing
CME Offerings & the future of the CME portal

The future:

• Trainings on online syllabus; mobile app; faculty management
• Vendor, Cloud CME, is continually making improvements.
  • Next roll out of updated portal – January 2018
Thank You!