

CME Bootcamp: Cloud CME for Conference Course Coordinators

December 2017

Presented by: Sheryl Corey, Jennifer Banys & Allison McCollum

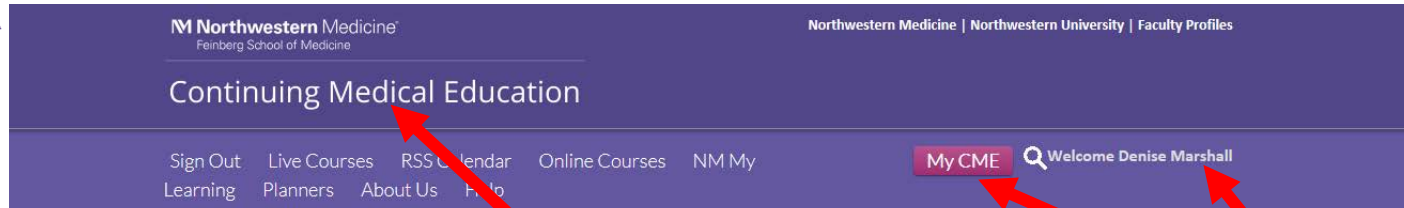
Introductions

- 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



Planners tab has resources and templates.

Click on CME to return to home page.

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





CME application

Start a new CME application

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.

New Application

Admin User Lookup ☒ Hide Approved ☐ Hide Submitted

Export XLS

ACTIVITYID	ACTIVITY NAME	AUTHOR	LAST REVISED	DISCLOSURE STATUS
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
	WR Delnor Perinatal M&M Review	Jennifer Perkins	11/27/2017 11:59:28 AM	Caroline Mills, MD does not have a disclosure on file. Caroline Mills, MD does not have a disclosure on file. Disclosures Required Copy Delete
58706	2018 IRB Panel Meeting Series	Olga Jonas, MS, CIP	11/27/2017 11:25:35 AM	All disclosures on file. Submit For Review Copy Delete
58488	WR-KH Breast Cancer Conference(Tumor Board)	Debbie Mitchell	11/22/2017 3:18:01 PM	All disclosures on file. Activity Submitted Copy Delete

Existing application



CME application

Caroline Mills, MD does not have a disclosure on file. Caroline Mills, MD does not have a disclosure on file.

Disclosures Required

Copy

Delete

All disclosures on file.

Submit For Review

Copy

Delete

All disclosures on file.

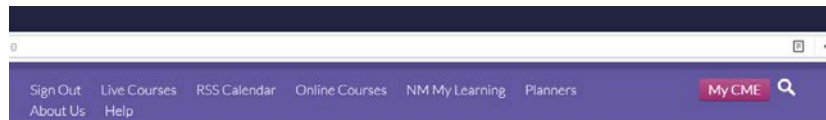
Activity Submitted

Copy

Delete

CME application

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



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.


A screenshot of the CME Application form. On the left is a sidebar menu with options: 'Basic Information', 'Planners and Faculty', 'Gap and Needs', 'Objectives and Outcomes', 'Educational Design', 'Support and Attestation', 'Files - upload/download', 'Comments', and 'Return To Applications List'. The main content area is titled 'Basic Information' and contains several fields: 'Activity Name/Title *', 'Activity Type *', a link for 'Activity Type descriptions', a radio button question 'Is your activity a series? (Not a Regularly Scheduled Series) *' with 'Yes' and 'No' options, 'Activity Format *', a text area for secondary activity format, 'Activity Description *', 'Activity Synopsis (optional short description shown on calendar and lists) *', another radio button question 'Is this a one-time quality improvement or patient safety activity? *' with 'Yes' and 'No' options, 'Type of Credit Requested *' with 'AMA PRA Category 1' and 'Non-Physician Attendance' options, and a final text area for 'Please list additional credits being offered (not accredited by FSM OCME)'. A 'print' button is located at the top right of the form area.




CME application

Multiple tabs

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



Division



Is an institution other than FSM or a Northwestern affiliate (listed above) involved in the educational planning of the activity?

☐ Yes

☒ No

➔ Save and Continue

Cancel ✕

Choose "Save and Continue" to advance to the next tab.

Northwestern University	Feinberg School of Medicine	Live Courses
Feinberg School of Medicine	240 E. Huron, Suite 1-200	RSS Calendar
Giving Site Feedback	Chicago, IL 60611-3008	Online Courses
Social Media Center	312-503-8533	NM My Learning
	312-503-4531	











CME application

Multiple tabs

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

member, click the red minus (-) icon to the left of the table row for that committee member.

	Email Address	Committee Member Full Name	Degree and Credentials	Institution	Role on Committee	Disclosure
 	c-schroedl@northwest	Clara Schroedl, MD	MD	FSM	Course I ▾	Disclosure
 	jbarsuk@nm.org	Jeffrey Barsuk	MD, MS	FSM	Planning ▾	
 	lwilliam@nm.org	Lisa Williams	MS, APN-CNS, NM		Planning ▾	
 	dwayne@northwestern	Diane B Wayne, MD	MD		Planning ▾	Disclosure

- 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.

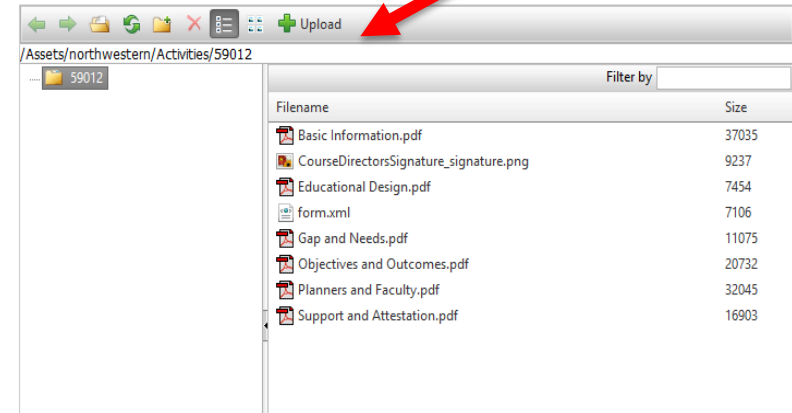
CME application

Multiple tabs

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

Basic Information
Planners and Faculty
Gap and Needs
Objectives and Outcomes
Educational Design
Support and Attestation
Files - upload/download
Comments
Return To Applications List

To add files to your application.



The screenshot shows a web application interface for uploading files. At the top, there is a navigation bar with several icons and a green 'Upload' button. A red arrow points to this button. Below the navigation bar, the breadcrumb path is '/Assets/northwestern/Activities/59012'. The main area displays a list of files with columns for 'Filename' and 'Size'. The files listed are:

Filename	Size
Basic Information.pdf	37035
CourseDirectorsSignature_signature.png	9237
Educational Design.pdf	7454
form.xml	7106
Gap and Needs.pdf	11075
Objectives and Outcomes.pdf	20732
Planners and Faculty.pdf	32045
Support and Attestation.pdf	16903

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
 - Faculty spreadsheet
 - Agenda
- Signature

Northwestern Medicine
Feinberg School of Medicine

Northwestern Medicine | Northwestern University | Faculty Profiles
Welcome Sheryl Corey, MBA

Continuing Medical Education

Sign Out Live Courses RSS Calendar Online Courses NM My Learning Planners My CME Faculty

Planners

First step before applying for CME
Procedures and Protocols
Guidelines for Planning a CME Activity
CME Review Committee Schedule

Resources for filling out the CME application

Budget template (required for application)
Speaker/Faculty spreadsheet (required for application)
Activity Type Definitions
Writing Learning Objectives – Quick Tips & Examples
Learning Objectives – Measurable Verbs
Helpful Tips for Completing the Gap and Needs Section

Submitting a Grant

Grant request protocol
Grant application intake form
(only needed if the Office of CME is requesting your grant)
Grant Letter of Request
Northwestern's LOA

Exhibitors

Hold Harmless Agreement
Exhibitor Letter sample

Resources for Coordinating a conference

Program Template Form - Direct (required)
Program Template Form - Joint (required)
Brochure template

Regularly Scheduled Series

Requirements for Promotional Materials
Example of Promotional Materials
Entering in attendance instructions

CME application

Multiple tabs

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

1154&ActivityID=59012

The Office of CME offers optional additional support for activity planning. Fees apply. Check all the services you would like the OCME to perform on your behalf:




<input type="checkbox"/> Educational Grant submission	<input type="checkbox"/> Exhibitor submission
<input type="checkbox"/> Manage online registration	<input type="checkbox"/> Name badges
<input type="checkbox"/> Onsite staffing	

Attestation

As the course director, I attest that this CME activity will comply with the following ACCME requirements:

1. All the recommendations involving *clinical* medicine in a CME activity must 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*
2. All scientific research referred to, reported, or used in CME in support or justification of a patient care recommendation must conform to the generally accepted standards of experimental design, data collection, and analysis
3. CME activities must not promote recommendations, treatment, or manners of practicing medicine that are not within the definition of CME, or are known to have risks or dangers that outweigh the benefits or are known to be ineffective in the treatment of patients
4. The activity planning process and educational content are free of commercial influence and/or bias
5. If the ACCME receives a complaint about an educational activity not coordinated by the Office of CME, the course director will be responsible to respond to the complaint according to the ACCME's Procedure for Handling Complaints located at: <http://www.accme.org/news-publications/publications/processes-complaints-regarding-acc-credited-providers-and-recognized-1>, and any fees associated with the complaint.

I have reviewed and approved the budget estimate and I understand the policies regarding the program's financial responsibilities.

Course Director's Signature 	Date 12/06/2017
Division Chief's Signature 	Date MM/DD/YYYY
Department Chair's Signature 	Date MM/DD/YYYY

[Save and Continue](#) [Cancel](#)

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

[Sign In](#)

[Live Courses](#)

[RSS Calendar](#)

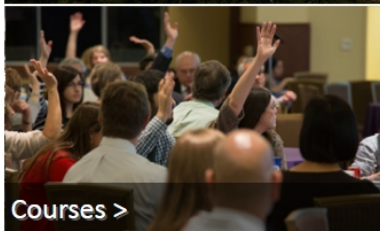
[Online Courses](#)

[NM My Learning](#)

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[About Us](#)

[Help](#)



[Courses >](#)



[CME Application >](#)



[My CME >](#)

Scroll to the bottom of the home page:

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312-503-8533



312-503-4531



Email Us



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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

☐ 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. *

☐ Agree☐ Disagree☐ N/A

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. *

☐ Agree☐ Disagree☐ N/A

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. *

☐ Agree☐ Disagree☐ N/A


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


 Signature Image

Date *



 Please review your responses above to make sure all required fields (* indicates required) are completed before continuing.




 Submit

Reset 

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: ⓘ

Type of Financial Relationship ⓘ

Indicate Applicable Manufacturer ⓘ

Relationship, If other:

Manufacturer, If other:

Relationship Status: Current or date ended

Types of Financial Relationships

Type of Financial Relationship ⓘ

Salary
Royalty
Receipt of Intellectual Property Rights/Patent Holder
Consulting Fee
Speakers Bureau
Fees for Non-CE Services Received Directly from a Commercial Interest or its Agent


Type of Financial Relationship ⓘ

Receipt of Intellectual Property Rights/Patent Holder
Consulting Fee
Speakers Bureau
Fees for Non-CE Services Received Directly from a Commercial Interest or its Agent
Contracted Research
Ownership Interest
Other



Applicable Manufacturer

Indicate Applicable Manufacturer ⓘ



Other

3F Therapeutics

3M

Aastrom Biosciences, Inc.

Abbott Laboratories

Abbott Vascular

Abiomed, Inc.

Abt. Associates

Relationship Status

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

More than one relationship? ADD MORE ROWS!

Please specify your relationship: 

Type of Financial Relationship 

Indicate Applicable Manufacturer 

Relationship, If other:

Manufacturer, If other:

Relationship Status: Current or date ended

To add additional rows, click the green + icon to the right.

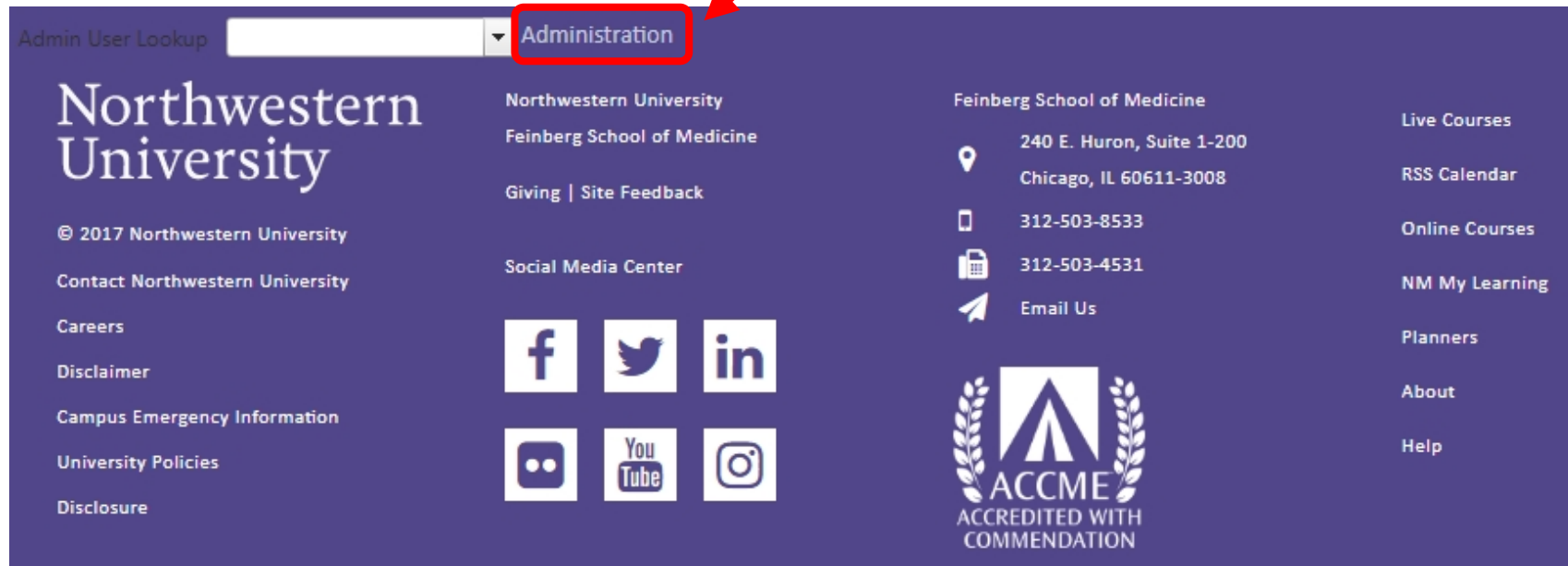


Once they have added all financial relationships...

- 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:



The screenshot shows the footer of the Northwestern University website. At the top left, there is an 'Admin User Lookup' field and a dropdown menu with 'Administration' selected and highlighted by a red box. A red arrow points from the text above to this box. The footer is divided into several columns. The first column contains the Northwestern University logo, copyright information, and links to contact, careers, disclaimer, campus emergency information, university policies, and disclosure. The second column contains links to Northwestern University and the Feinberg School of Medicine, giving and site feedback, and a social media center with icons for Facebook, Twitter, LinkedIn, YouTube, and Instagram. The third column contains the Feinberg School of Medicine address, phone numbers, and email link. The fourth column contains a list of links: Live Courses, RSS Calendar, Online Courses, NM My Learning, Planners, About, and Help. At the bottom right, there is an ACCME logo with the text 'ACCREDITED WITH COMMENDATION'.

Admin User Lookup Administration

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ACCME
ACCREDITED WITH
COMMENDATION

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RSS Calendar

Online Courses

NM My Learning

Planners

About

Help

CLOUD CME Administration Home page

The screenshot shows the CloudCME Administration Home page. The page has a dark blue sidebar on the left with a list of navigation items: Home, Abstracts, Activities, Administration, Content, Email, Exhibitors, Faculty, Finance, Forms, Membership, and Reports. The 'Reports' item is highlighted with a red box. A red arrow points from the 'Reports' item in the sidebar to the 'Faculty Disclosures' item in the 'Reports' section of the main content area. The 'Reports' section is also highlighted with a red box. The main content area has a light gray background and contains a list of reports: Membership, Registrations, Orders, Credits, Evaluations, Faculty Disclosures, Faculty Reports, Credits Over Time, Income by Event, File Uploads, Edit History, Login History, Email Statistics, Credit Summary, Test Results, and Stark EMV. The 'Faculty Disclosures' item is highlighted with a red box. On the right side of the page, there is a 'Tweets' section with two tweets from CloudCME. The first tweet says 'For those users gro Chicago. form here' and the second tweet says 'New Activ you can n uploaded, the Zip All'.

CloudCME
northwestern

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

Reports

Membership
Registrations
Orders
Credits
Evaluations
Faculty Disclosures
Faculty Reports
Credits Over Time
Income by Event
File Uploads
Edit History
Login History
Email Statistics
Credit Summary
Test Results
Stark EMV

Evaluation Status

Tweets by @

CloudCME :
For those
users gro
Chicago. |
form here


CloudCME :
New Activ
you can n
uploaded,
the Zip All

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:

☐ All ☐ Parents Only 


Create Report

Individual:

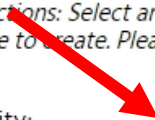

Searching By Activity

- 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)

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 1 minute to create. Please be patient. When finished you can export the report to several formats including PDF.

Activity: ▼ ☐ All ☐ Parents Only 

Individual: ▼

  [Create Report](#)

Searching By Activity

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

minute to create a report for patients. When finished you can export the report to several formats including

Activity: ☐ All ☐ Parents Only

Individual:



[Download PDF](#)

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!)

Individual:

Corey, Sheryl (850) sheryl.corey@northv



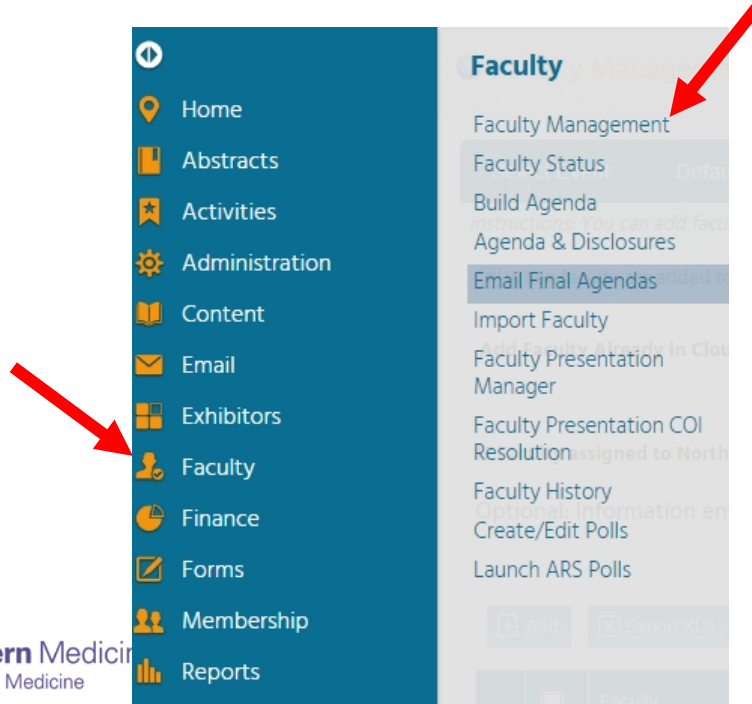
Disclosure of Relevant Financial Relationships for Continuing Professional Education

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.

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?**

M Northwestern Medicine®
Feinberg School of Medicine

Recording Attendance



Online Registration Through Cloud CME

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:

 Record Attendance

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

 ☐ All ☐ Parents Only 

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:

Record Attendance

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

Cloud



☐ All ☐ Parents Only 

CloudCME Test - 2905

ARS in **CloudCME Test #1 - 4243-582**

Attendance of

Recording Attendance – An Overview

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

Record Attendance (Total:5, Attended:1 No Attendance:4)

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

Training Demo - CLOUDCME ☐ All ☐ Parents Only

Attendance Options

Activity Options:

Credits this activity awards:

☒ AMA PRA Category 1™

☐ Non-Physician Attendance

☐ AAFP - American Academy of Family Physicians

Attendance Date:

5/31/2017

Credit: 5

Last credit recorded on 5/31/2017

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

Select	Last, First	User ID	Degree	User Credit Eligibility	Transcript	Type	CECreditCategoryID	Hours Claimed	Credit Date	
<input type="checkbox"/>	Millard, Beverly	3	MD	AMA PRA Category 1™	Transcript		0	0		Remove Credit
<input type="checkbox"/>	Millard, Tim	12670	DO	AMA PRA Category 1™	Transcript		0	0		Remove Credit
<input type="checkbox"/>	Pope, Zachary	11	MD	AMA PRA Category 1™	Transcript		0	0		Remove Credit
<input type="checkbox"/>	Welch, Thomas	5	MD	AMA PRA Category 1™ AAFP - American Academy of Family Physicians	Transcript		0	0		Remove Credit
<input type="checkbox"/>	Wilkins, Karl	1	NA	Non-Physician Attendance, AAFP - American Academy of Family Physician	Transcript	Non-Physician Attendance	3	5.00	5/31/2017	Remove Credit

Recording Attendance - Overview

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

Record Attendance (Total:5, Attended:1 No Attendance:4)

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

Training Demo - CLOUDCME ☐ All ☐ Parents Only

Attendance Options:

Credits this activity awards:

- ☒ AMA PRA Category 1™
- ☒ Non-Physician Attendance
- ☐ AAFP - American Academy of Family Physicians

Attendance Date: 5/31/2017 Credit: 5

Last credit recorded on 5/31/2017

Add Users:

☒ Auto-Award Credits for Added Users

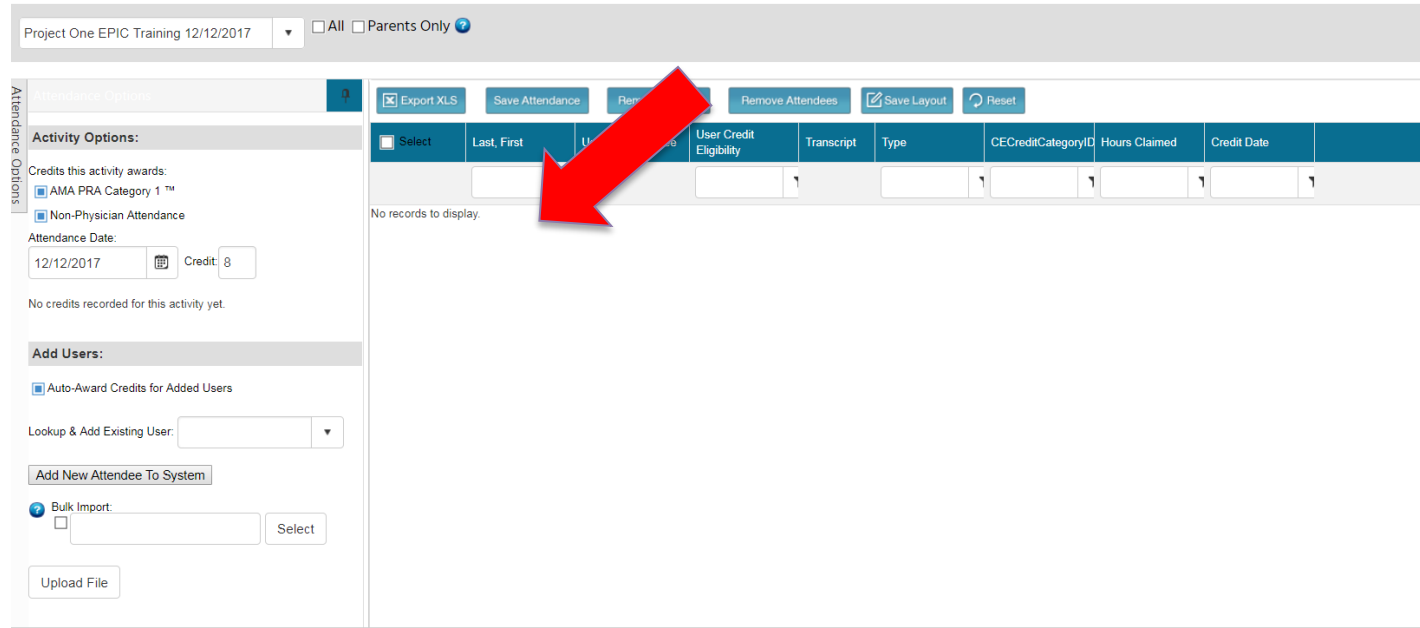
Lookup & Add Existing User:

Select	Last, First	User ID	Degree	User Credit Eligibility	Transcript	Type	CECreditCategoryID	Hours Claimed	Credit Date	
<input type="checkbox"/>	Millard, Beverly	3	MD	AMA PRA Category 1™	Transcript		0	0		Remove Credit
<input type="checkbox"/>	Millard, Tim	12670	DO	AMA PRA Category 1™	Transcript		0	0		Remove Credit
<input type="checkbox"/>	Pope, Zachary	11	MD	AMA PRA Category 1™	Transcript		0	0		Remove Credit
<input type="checkbox"/>	Welch, Thomas	5	MD	AMA PRA Category 1™ AAFP - American Academy of Family Physicians	Transcript		0	0		Remove Credit
<input type="checkbox"/>	Wilens, Karl	1	NA	Non-Physician Attendance, AAFP - American Academy of Family Physician	Transcript	Non-Physician Attendance	3	5.00	5/31/2017	Remove Credit

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.



The screenshot shows a web application for recording attendance. At the top, there is a dropdown menu set to "Project One EPIC Training 12/12/2017" and checkboxes for "All" and "Parents Only". Below this is a sidebar on the left with "Attendance Options" and "Activity Options". The "Activity Options" section includes checkboxes for "AMA PRA Category 1™" and "Non-Physician Attendance", an "Attendance Date" field set to "12/12/2017", and a "Credit" field set to "8". The "Add Users" section includes an "Auto-Award Credits for Added Users" checkbox, a "Lookup & Add Existing User" dropdown, an "Add New Attendee To System" button, and a "Bulk Import" section with a checkbox and a "Select" button. The main area on the right contains a table with columns: "Select", "Last, First", "User", "User Credit Eligibility", "Transcript", "Type", "CECreditCategoryID", "Hours Claimed", and "Credit Date". Above the table are buttons for "Export XLS", "Save Attendance", "Remove Attendees", "Save Layout", and "Reset". A red arrow points to the "User" column header. Below the table, it says "No records to display."

Project One EPIC Training 12/12/2017 ☐ All ☐ Parents Only

Attendance Options

Activity Options:

Credits this activity awards:

- ☒ AMA PRA Category 1™
- ☐ Non-Physician Attendance

Attendance Date: 12/12/2017 Credit: 8

No credits recorded for this activity yet.

Add Users:

- ☒ Auto-Award Credits for Added Users

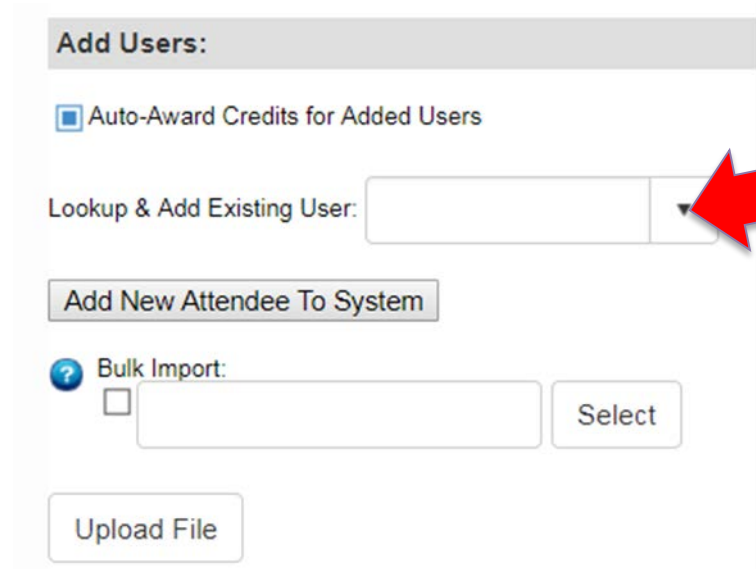
Lookup & Add Existing User:

☒ Bulk Import:

Select	Last, First	User	User Credit Eligibility	Transcript	Type	CECreditCategoryID	Hours Claimed	Credit Date
No records to display.								

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”.



The screenshot shows a web form titled "Add Users:". It contains the following elements:

- A checkbox labeled "Auto-Award Credits for Added Users" which is checked.
- A text input field labeled "Lookup & Add Existing User:" with a dropdown arrow on the right. A large red arrow points to this field.
- A button labeled "Add New Attendee To System".
- A section labeled "Bulk Import:" with a question mark icon, a checkbox, a text input field, and a "Select" button.
- A button labeled "Upload File".

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”.

The screenshot displays the 'Add Users' interface. On the left, there are options for 'Auto-Award Credits for Added Users' (checked), 'Add New Attendee To System' (button), and 'Bulk Import' (checkbox). The 'Look up & Add Existing User:' section features a dropdown menu currently showing 'Corey, Sheryl (850)'. A list of suggestions is visible below the dropdown:

- Corey, Christopher (30119) christopher.corey@steward.org
- Corey, Seth J (3909) s-corey@northwestern.edu
- Corey, Sheryl (850) sheryl.corey@northwestern.edu
- Corey, Sheryl Ann (27456) sheryl_corey@yahoo.com

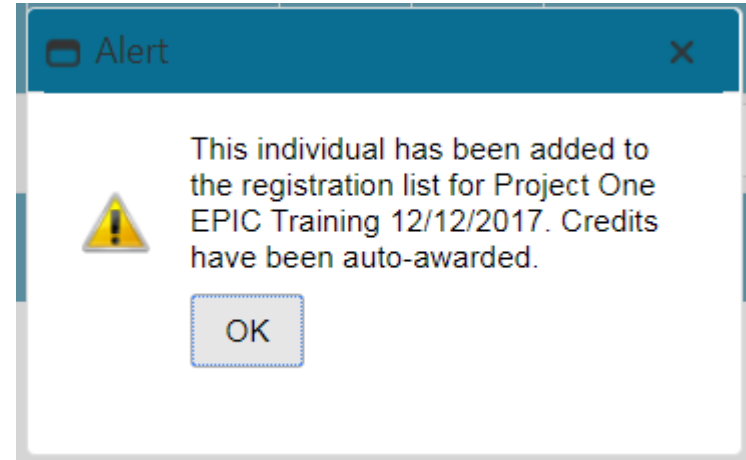
On the right, a table lists user details. The visible row is for 'Welch, Thomas', ID '5', MD, with 'AMA PRA Category 1' and 'Transcript' links.

Overlaid on the interface is a confirmation dialog box with a question mark icon, asking: 'Add Corey, Sheryl (850) sheryl.corey@northwestern.edu?'. It includes 'OK' and 'Cancel' buttons.

Recording Attendance – Adding Non-Cloud CME Users

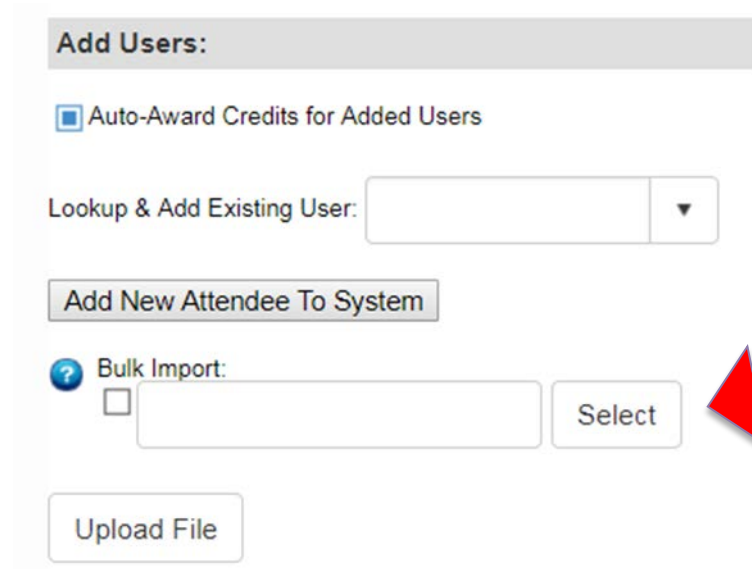
Step 3:

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**.



The screenshot shows a web form titled "Add Users:". It contains the following elements:

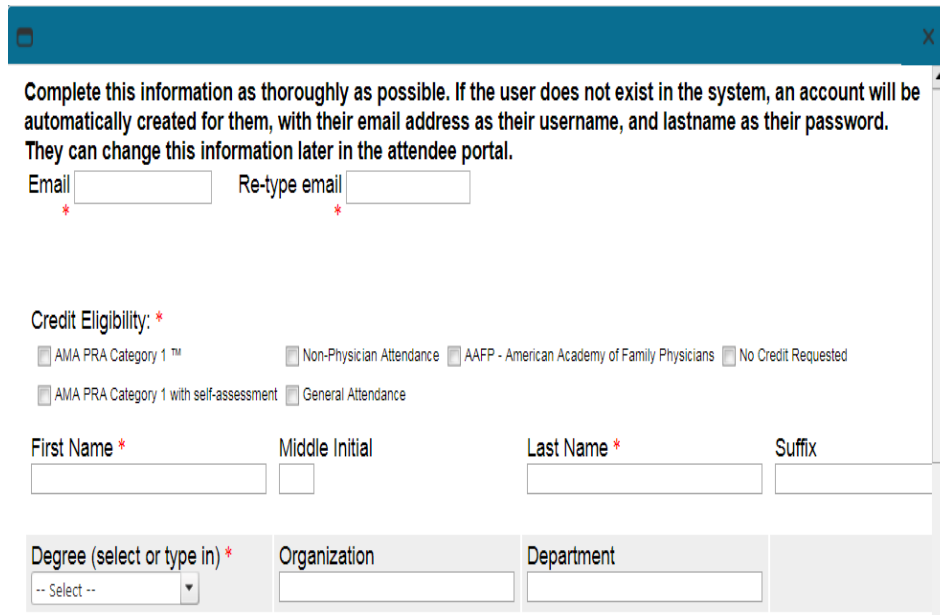
- A checkbox labeled "Auto-Award Credits for Added Users" which is checked.
- A text input field labeled "Lookup & Add Existing User:" followed by a dropdown arrow.
- A button labeled "Add New Attendee To System".
- A section labeled "Bulk Import:" with a question mark icon, a checkbox, a text input field, and a "Select" button. A large red arrow points to this "Select" button.
- A button labeled "Upload File" at the bottom.

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).



Complete this information as thoroughly as possible. If the user does not exist in the system, an account will be automatically created for them, with their email address as their username, and lastname as their password. They can change this information later in the attendee portal.

Email Re-type email

Credit Eligibility: *

☐ AMA PRA Category 1™ ☐ Non-Physician Attendance ☐ AAFP - American Academy of Family Physicians ☐ No Credit Requested

☐ AMA PRA Category 1 with self-assessment ☐ General Attendance

First Name * Middle Initial Last Name * Suffix

Degree (select or type in) * Organization Department

Recording Attendance – Adding Non-Cloud CME Users

Your user will now appear on the attendance roster, highlighted in **blue**.

☒
Export XLS

Save Attendance

Remove Credits

Remove Attendees

☒
Save Layout

<input type="checkbox"/> Select	Last, First	User ID	Degree	User Credit Eligibility	Transcript	Type
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	Corey, Sheryl	850	MBA	Non-Physician Attendance	Transcript	Non-Physician Attendance

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.

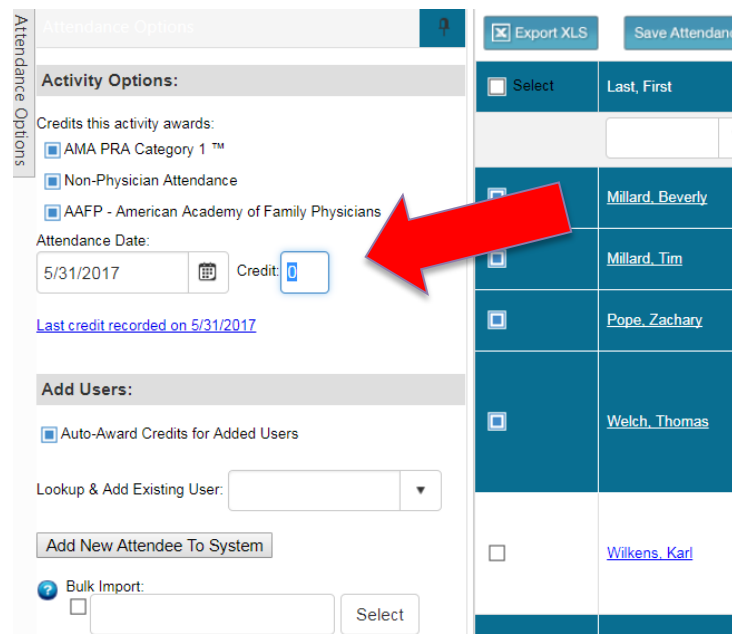
You will need to check/highlight the row of the attendee (make sure no one else is highlighted as to not change the other learners' credits).

Select	Last, First	User ID	Degree	User Credit Eligibility	Transcript	Type	CECreditCategoryID	Hours Claimed	Credit Date	
<input type="checkbox"/>	Milard, Beverly	3	MD	AMA PRA Category 1™	Transcript		0	0		Remove Credit
<input type="checkbox"/>	Milard, Tim	12670	DO	AMA PRA Category 1™	Transcript		0	0		Remove Credit
<input type="checkbox"/>	Pope, Zachary	11	MD	AMA PRA Category 1™	Transcript		0	0		Remove Credit
<input type="checkbox"/>	Welch, Thomas	5	MD	AMA PRA Category 1™ AAFP - American Academy of Family Physicians	Transcript		0	0		Remove Credit

Recording Attendance – Cloud CME Users

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”.




The screenshot shows the 'Attendance Options' form. A red arrow points to the 'Credits' field, which contains the number '0'. The form includes sections for 'Activity Options', 'Attendance Date', 'Add Users', and a list of users on the right.

Attendance Options

Activity Options:

Credits this activity awards:


- ☒ AMA PRA Category 1™
- ☒ Non-Physician Attendance
- ☒ AAFP - American Academy of Family Physicians


Attendance Date: 5/31/2017  Credits:

[Last credit recorded on 5/31/2017](#)

Add Users:

- ☒ Auto-Award Credits for Added Users

Lookup & Add Existing User: 

 Bulk Import: ☐

<input type="checkbox"/>	Last, First
<input type="checkbox"/>	Millard, Beverly
<input type="checkbox"/>	Millard, Tim
<input type="checkbox"/>	Pope, Zachary
<input type="checkbox"/>	Welch, Thomas
<input type="checkbox"/>	Wilkins, Karl

Recording Attendance – Cloud CME Users


Step 3: click “**Save Attendance**”.

<input checked="" type="checkbox"/> Export XLS	Save Attendance	Remove Credits	Remove Attendees	Save Layout		
<input type="checkbox"/> Select	Last, First		Degree	User Credit Eligibility	Transcript	Type
	<input type="text"/>	<input type="text"/>		<input type="text"/>		
<input type="checkbox"/>	Millard, Beverly	3	M	AMA PRA Category 1™	Transcript	
<input type="checkbox"/>	Millard, Tim	12670	DO	AMA PRA Category 1™	Transcript	
<input type="checkbox"/>	Pope, Zachary	11	MD	AMA PRA Category 1™	Transcript	
<input type="checkbox"/>	Welch, Thomas	5	MD	AMA PRA Category 1™ AAFP - American Academy of Family Physicians	Transcript	
<input type="checkbox"/>	Wilkins, Karl	1	NA	Non-Physician Attendance, AAFP - American Academy of Family Physician	Transcript	Non-Physician Attendance

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.

	Wilkens, Karl	1	NA	Non-Physician Attendance AAFP - American Academy of Family Physicians	Transcript		0	0.00	

QUESTIONS?



Evaluations

Can now be done online via Cloud CME!



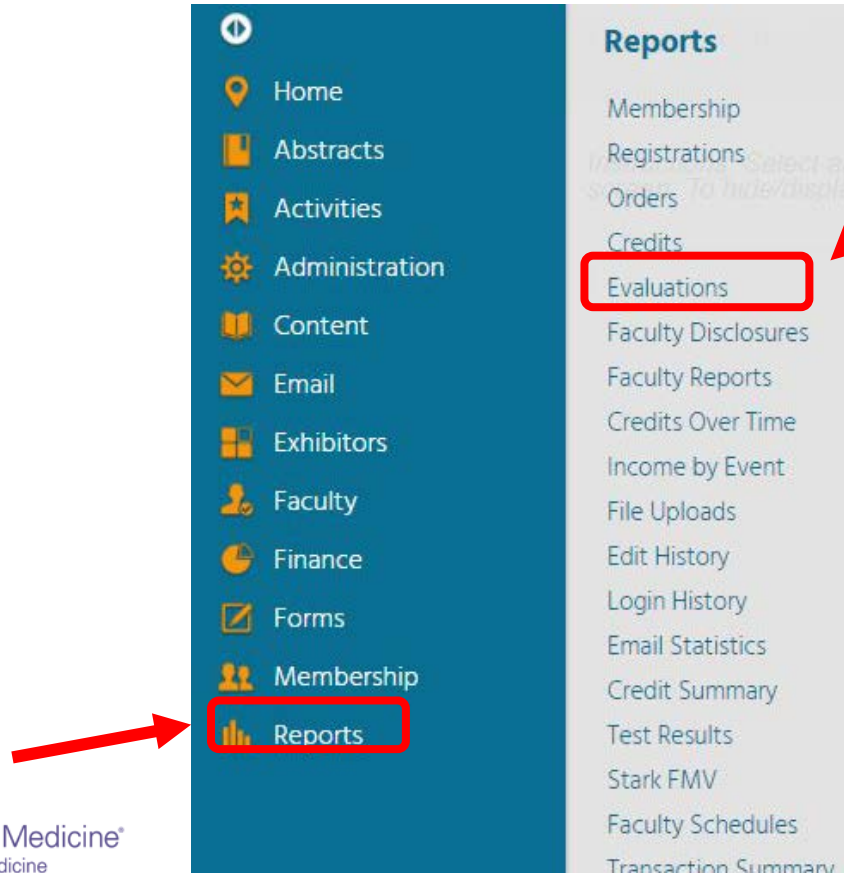
There are 2 evaluation templates currently available:

- 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.

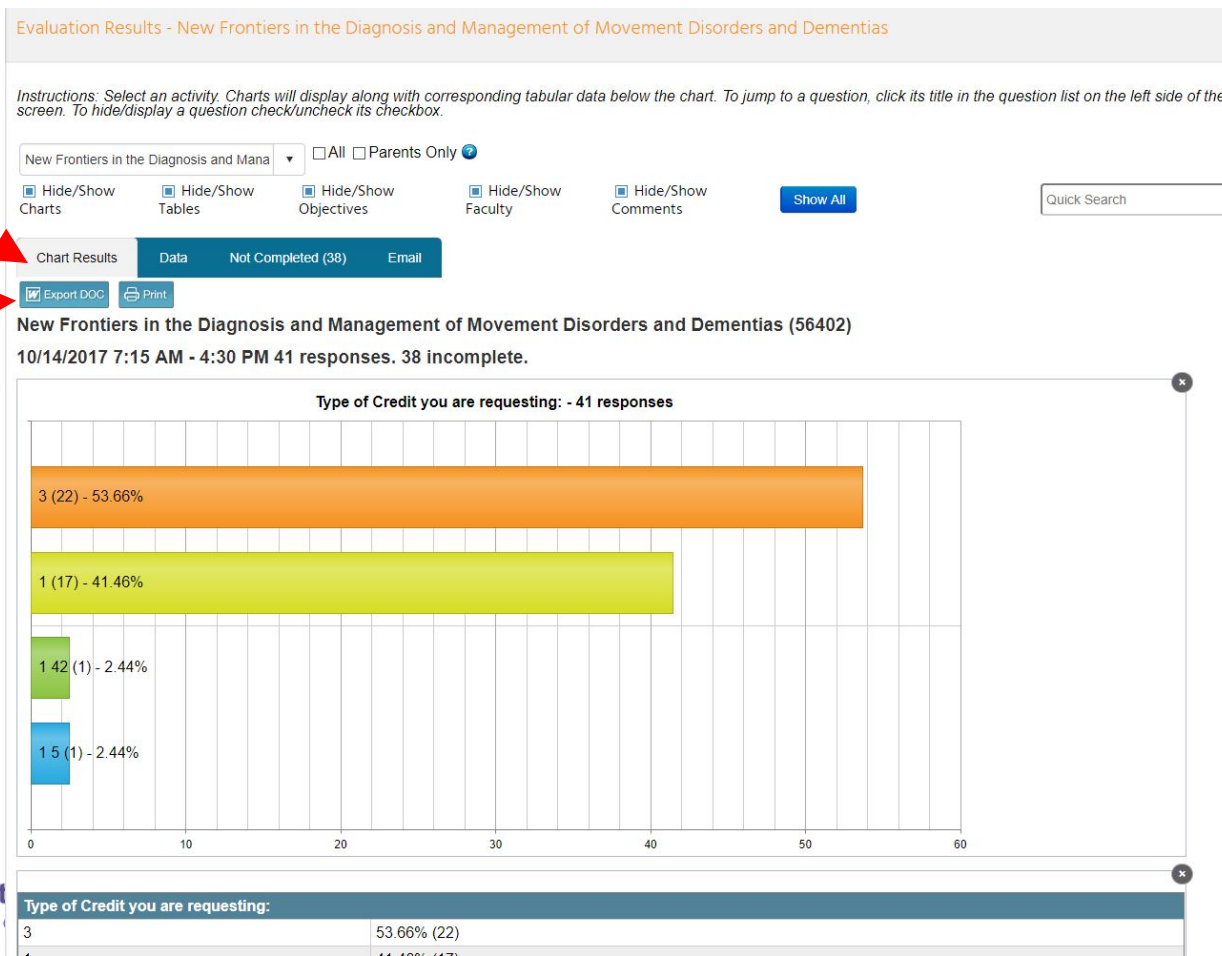
move ☐ All ☐ Parents Only ?

1.19.17 - Neurology Clinical Case Conference - **Movement Disorders** - FSM 5200

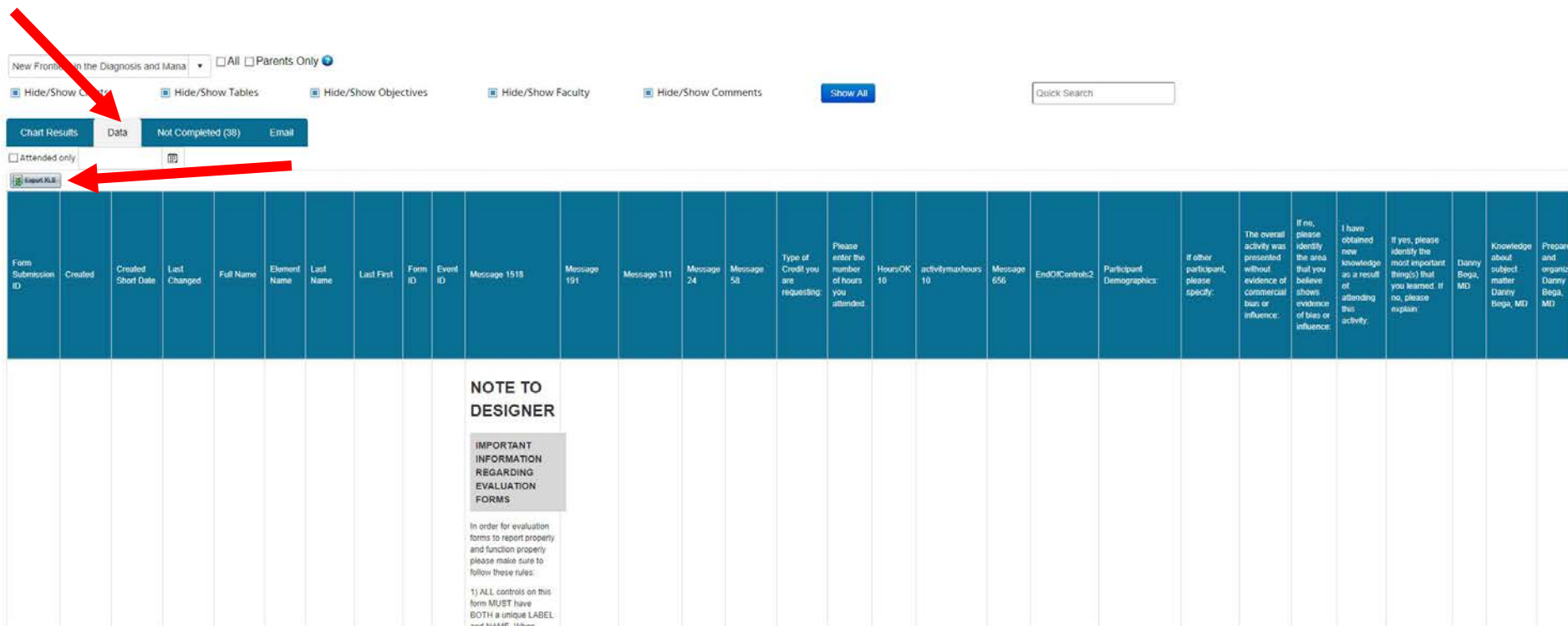
New Frontiers in the Diagnosis and Management of **Movement Disorders** and Dementias - -1

8.31.17 Clinical Case Conference - **Movement Disorders** - FSM 5200

The Chart Results report is the first report you will see:



Next is the Data Report:



New Frontiers in the Diagnosis and Management of Autism Spectrum Disorders

☐ All ☐ Parents Only

☒ Hide/Show Controls ☒ Hide/Show Tables ☒ Hide/Show Objectives ☒ Hide/Show Faculty ☒ Hide/Show Comments [Show All](#)

[Chart Results](#) [Data](#) [Not Completed \(38\)](#) [Email](#)

☐ Attended only ☐

[Export XLS](#)

Form Submission ID	Created	Created Short Date	Last Changed	Full Name	Element Name	Last Name	Last First	Form ID	Event ID	Message 1518	Message 191	Message 311	Message 24	Message 58	Type of Credit you are requesting	Please enter the number of hours you attended	Hours OK 10	activitymaxhours 10	Message 656	EndOfControls2	Participant Demographics	If other participant, please specify:	The overall activity was presented without evidence of commercial bias or influence.	If no, please identify the area that you believe shows evidence of bias or influence.	I have obtained new knowledge as a result of attending this activity.	If yes, please identify the most important thing(s) that you learned. If no, please explain.	Danny Boga, MD	Knowledge about subject matter Danny Boga, MD	Prepared and organized Danny Boga, MD
										<div>NOTE TO DESIGNER</div> <div>IMPORTANT INFORMATION REGARDING EVALUATION FORMS</div> <p>In order for evaluation forms to report properly and function properly please make sure to follow these rules:</p> <p>1) ALL controls on this form MUST have BOTH a unique LABEL and NAME When</p>																			

Downloaded Data report shows in an Excel Spreadsheet:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	
1	FormSubn	Created	CreatedSh	LastChang	FullName	ElementN	LastName	LastFirst	FormID	EventID	NoteToDes	evaluation	eventdetail	EndOfConf	CreditConf	Physician	HoursClair	HoursOK	activityma	MaxCredit	EndOfConf	Participant	IfOtherPart	WasThisA	IfNotFree	O	WereYo
2	1041	#####	43024	#####	Jo		Ar	Jo	104	56402	<h1>NOTE New Fronti	Northwest	End of sec You canno			1	8		8		End of sec Physician	(MD/DO)	Yes			Yes	
3	1039	#####	43024	#####	Sa		Bar	Sa	104	56402	<h1>NOTE New Fronti	Northwest	End of sec You canno			3	8		8		End of sec Other	CME Adm	Yes			Yes	
4	1446	#####	43040	#####	ch		TR ba	chri	104	56402	<h1>NOTE New Fronti	Northwest	End of sec You canno			3	8		8		End of sec Other	Occupatio	Yes			Yes	
5	1020	#####	43023	#####	Ar		s, MB	es	104	56402	<h1>NOTE New Fronti	Northwest	End of sec You canno			1	6		8		End of sec Physician	(MD/DO)	Yes			Yes	
6	1124	#####	43025	#####	Re		MD Bi	Re	104	56402	<h1>NOTE New Fronti	Northwest	End of sec You canno			1	8		8		End of sec Physician	(MD/DO)	Yes			Yes	
7	1264	#####	43032	#####	Ke		TR Bi	elc	104	56402	<h1>NOTE New Fronti	Northwest	End of sec You canno			3	8		8		End of sec Other	Occupatio	Yes			No	
8	1389	#####	43037	#####	Kr		DP' Bu	Kr	104	56402	<h1>NOTE New Fronti	Northwest	End of sec You canno			3	8		8		End of sec Other	Physical T	Yes			Yes	
9	1025	#####	43023	#####	Ca		y, I Ca	C	104	56402	<h1>NOTE New Fronti	Northwest	End of sec You canno			3	8		8		End of sec Other	Physical T	Yes			Yes	
10	1295	#####	43033	#####	Pe		MD Ch	F	104	56402	<h1>NOTE New Fronti	Northwest	End of sec You canno			1	8		8		End of sec Physician	(MD/DO)	Yes			Yes	
11	1273	#####	43032	#####	M		T Di	eg	104	56402	<h1>NOTE New Fronti	Northwest	End of sec You canno			3	8		8		End of sec Other	Physical T	Yes			Yes	
12	1149	#####	43026	#####	Ne		Fr	Nc	104	56402	<h1>NOTE New Fronti	Northwest	End of sec You canno			3	8		8		End of sec Other	Physical T	Yes			Yes	
13	1128	#####	43025	#####	R		G	A	104	56402	<h1>NOTE New Fronti	Northwest	End of sec You canno			3	8		8		End of sec Other	Occupatio	Yes			Yes	
14	1259	#####	43031	#####	Ra		D G	ke	104	56402	<h1>NOTE New Fronti	Northwest	End of sec You canno			1	8		8		End of sec Physician	(MD/DO)	Yes			Yes	
15	1051	#####	43024	#####	La		DP' G	aw	104	56402	<h1>NOTE New Fronti	Northwest	End of sec You canno			3	8		8		End of sec Other	Physical T	Yes			Yes	
16	1260	#####	43031	#####	R		pp, G	pf	104	56402	<h1>NOTE New Fronti	Northwest	End of sec You canno			1	8		8		End of sec Midlevel	Practitioner	(Yes			Yes	
17	1180	#####	43027	#####	M		Ha	ha	104	56402	<h1>NOTE New Fronti	Northwest	End of sec You canno			3	8		8		End of sec RN/LPN		Yes			Yes	
18	1093	#####	43025	#####	Sh		O K	she	104	56402	<h1>NOTE New Fronti	Northwest	End of sec You canno	142			8		8		End of sec Physician	(MD/DO)	Yes			Yes	
19	1031	#####	43024	#####	De		MD Ch	h C	104	56402	<h1>NOTE New Fronti	Northwest	End of sec You canno			1	8		8		End of sec Physician	(MD/DO)	Yes			Yes	
20	1032	#####	43024	#####	T		MD Li	od	104	56402	<h1>NOTE New Fronti	Northwest	End of sec You canno			1	8		8		End of sec Physician	(MD/DO)	Yes			No	
21	1394	#####	43038	#####	Fa		d, I M	gd	104	56402	<h1>NOTE New Fronti	Northwest	End of sec You canno			1	8		8		End of sec Physician	(MD/DO)	Yes			Yes	
22	1202	#####	43028	#####	Z		M	Dai	104	56402	<h1>NOTE New Fronti	Northwest	End of sec You canno			3	8		8		End of sec Other	Social Wo	Yes			Yes	
23	1090	#####	43025	#####	Z		R M	z Z	104	56402	<h1>NOTE New Fronti	Northwest	End of sec You canno			3	8		8		End of sec Other	Occupatio	Yes			Yes	
24	1017	#####	43022	#####	Pi		OPT M	P	104	56402	<h1>NOTE New Fronti	Northwest	End of sec You canno			3	8		8		End of sec Other	Allied Heal	Yes			Yes	
25	1223	#####	43022	#####	Ar		MD M	Ar	104	56402	<h1>NOTE New Fronti	Northwest	End of sec You canno			1	8		8		End of sec Physician	(MD/DO)	Yes			Yes	

See who hasn't completed the evaluation...

The screenshot shows a web application interface with a table of evaluation results. The table has columns for Name, Email, and Credit Eligibility. The 'Not Completed (38)' tab is selected, and the 'Export XLS' button is visible. The pagination controls at the bottom show page 1 of 10.

Chart Results	Data	Not Completed (38)	Email
Export XLS			
Name	Email	Credit Eligibility	
ANNE			
Ghaza			
Danny			
Borna			
Lori B			
Brend			
Danie			
Tony C			
Shelle			
Maria			

Page size: 10

[illegible]

Change the Full Name field to your name!

The email address cannot be changed

This should autofill to your email

Chart Results Data Not Completed (37) Email

Previously sent messages: Type a few letters to ▼

Subject Line

From - Full Name

Northwestern University Office

From - Email Address *

cme@northwestern.edu ▼

CC

BCC

☐ Send Test Message

j-banys@northwestern.edu

Attachment (1 mb max file size):

Select

No attachment uploaded

abc Hind, san... 3 A x² x₂ B I U

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!