

RSS TRAINING

Session Workflow

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Part One: Access Series

Step 1-Go to : <https://cce.upmc.com/>

Step 2- In the upper right, click login and enter your information.

Step 3- Once logged in, click on **MY ACCOUNT**.

Step 4- In your account, click on **VIEW**.

MY ACCOUNT

VIEW	EDIT	BOOKMARKS	M
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Step 5- Scroll to the bottom of the page and choose the series you are coordinating.

SERIES

- UPMC Training

Step 6- This is the home page of your series, review the information in the body. You will need this information when creating your session(s).

Tip: It may be helpful to Copy/Paste this information into a Word document for reference

Tip: To return to the home page choose **Home** under **FEATURES**.

UPMC TRAINING

VIEW	GROUP	SESSION WORKFLOW DASHBOARD	REVISIONS
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FEATURES

- Home
- Sessions

ADD CONTENT

- Session

ADMIN

- Members
- Group dashboard
- Group report

SERIES DATE:

Monday, September 30, 2019 - 2:43pm to Tuesday, October 8, 2019 - 8:43pm

Course Contact: Matt Barnett, barnettm3@upmc.edu

Type of Credit: CME, ANCC

Number of credits: 1

RSS Type: Committee

Course Direct/Planning Committee Conflict of Interest Disclosure: Not Applicable

SERIES LOCATION:

heinz hall
18000 plaza place
pittsburgh, PA 15213
United States
See map: [Google Maps](#)

Note: to view/edit existing sessions, choose Sessions.

Part Two: Create Session

Step 1- From the series home page, on the left-hand side under **ADD CONTENT**, click **Session**. Now you are at the individual session homepage (not the Series).

Tip: Do not "Save" after each step unless you are ready to exit because it will take you back to the session home page. If this occurs, choose the session and choose **Edit**.

FEATURES

Home
Sessions

ADD CONTENT

Session

Create Session

Home / Session

Step 2: Title & description *

Step 3: Time & place *

Step 4: Course settings

Step 5: Credit settings

Step 6: Custom

~~Publishing~~

Do not access.

Step 2- Click **Title & description**.

- **Title (required):** include the title/topic of session
- **Body:** include any information that may be useful for future reference such as learning objectives/speaker information
- **Couse Instruction:** leave blank
- **Format:** leave blank
- **Category:** leave blank

Step3 - Click **Time & place**.

- **Live** must be checked
- **Session date:** enter when the session will start and finish (i.e. this is the actual date/ time of the activity)
- **Location: enter the location information**
 - **Location name (required)** If virtual, use "Virtual" as location
 - **Street (not required)**
 - **City (required)**
 - **State/Providence (required):**
 - **Postal code (not required)**

Note: The information entered in Location name, City and State will be reflected on the learner's certificate.

Step 4- Click **Course settings**.

- **Outline display:** Make sure that **Course** is selected
- **Enrollment type:** Make sure that **Course** is selected
- **Duration:** Leave as "0"
- **External ID:** Leave blank
- **Uncheck Show on catalog** and **Show on calendar (IMPORTANT)**
- **Check Show on transcript**

- Show on catalog
- Show on calendar
- Show on transcript

Step 5- Click **Credit Settings** and choose **Course credit settings**

*This step is important because it designates the type and amount of credit that you are awarding. You are only allowed to award credit that has been pre-approved for your series. Please reference your series home page to review the type and amount of credit for your series.

- **Choose the type of credit.** The options are listed below. Remember, choose the credit approved for your series. And, ALWAYS choose attendance credit.

▶ AAPA Category I CME (Inactive)	American Academy of Physician Assistants (PA credit)
▶ ABIM MOC II (Inactive)	Do Not Use
▶ ACPE Pharmacy (Inactive)	Accreditation Counsel of Pharmacy Education (pharmacist credit)
▶ ACPE Technician (Inactive)	Accreditation Counsel of Pharmacy Education (pharmacist tech credit)
▶ AMA PRA Category 1 Credit™ (Inactive)	American Medical Association (CME, physician credit)
▶ ANCC (Inactive)	American Nursing Credentialing Center (nursing credit)

- **Designate the amount of credit.** Check **Active**. The minimum credit is always “0”. Max is the amount of credit being awarded. Credit is based on time. Every 15 minutes of education is equal to .25 credits. The default credit is designated on the series home page. If the time varies, please adjust accordingly. **Code** is left blank. **Variable credit** is *un-checked*.

<input checked="" type="checkbox"/> Active					
Increments	<input type="text" value="0.25"/>	Min	<input type="text" value="0.00"/>	Max	<input type="text" value="0.00"/>
Code	<input type="text"/>				
<input type="checkbox"/> Variable credit	→ Un-checked				

Remember, do not click “save” unless you are ready to exit.

Step 6- Click **Custom**. This section is used to upload required session documentation.

*This step is important because it is the approval step. Please note, In the previous system, documentation was approved at the end of every quarter. In this system, the approval is PRIOR TO EACH session. Most importantly, you will not be able to award credit to the learners until this step is complete and the documentation is approved. This step triggers a documentation workflow for each session. **ALL documents must be submitted at least 3 business days prior to the session).**

- Upload the following documents. All templates and supporting resources are accessible at <http://cce.upmc.com/rss>.

Information Sheet **REQUIRED**

Files must be less than 1 GB.
Allowed file types: doc docx ppt pptx pdf txt

No file chosen

Information Sheet: Available under the RSS coordinator resources tab at <http://cce.upmc.com/rss>.

COI Disclosure Form **REQUIRED**

Add a new file
Files must be less than 1 GB.
Allowed file types: doc docx ppt pptx pdf txt

No file chosen

COI Disclosure Form: A COI Disclosure Form is required for each speaker and/or newly assigned moderators.

Marketing Materials **NOT REQUIRED**

Files must be less than 1 GB.
Allowed file types: doc docx ppt pptx pdf txt

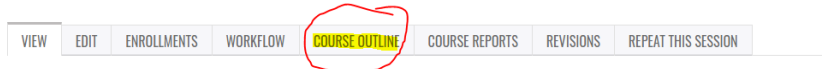
No file chosen

Marketing Materials: Advertisements such as flyers and announcements must be approved prior to the session.

Note: If you do not have all the documents ready to upload yet, you can hit “save” and resume at a later time, once you acquire all the necessary documents.

- Click **Save** now. But, you aren’t done yet.

Step 7- From the session home page (not the series home page), choose **Course Outline**.



Click on the drop-down arrow and add **Certificate**. Click, **Add Object**.

Credit

- Enabled
- Visible in outline
- Completion not required

A new page will appear. In the "Title Field", type "Certificate". Click **Update**. This will add the certificate to the course outline. Make sure the order of the objects is **Attendance** first, then **Credit**, then **Certificate**. Click **Save Outline**. This will not exit you from this screen. Choose View to go back to the **Session** landing page.

Step 8- This step initiates the review process. At this point, you should have uploaded the information sheet and disclosure form for the session. From the session home page (not the series home page), choose **Edit**.

- Choose **Workflow**.
- Change the state from "**New**" to "**Ready for review**". Click update workflow. This will start the approval process.

The screenshot shows a web interface for editing a session workflow. At the top, there is a header with the word "test" and a breadcrumb trail: "Home / RSS Test / test / Workflow". Below the header is a green navigation bar with buttons for "View", "Edit", "Enrollments", "Faculty", "Workflow", "Course outline", and "Course rep". The main content area is titled "Change Custom session state" and features two radio buttons: "New" (which is selected) and "Ready for review". Below this is a section for "Workflow comment" with a text input field and a green "Update workflow" button. At the bottom, there is a "Date" field showing "Thu, 11/21/2019 - 5:06pm".

Part Three: Repeating a Session

Step 1- Access your series.

Step 2- Choose **Sessions** (located under FEATURES). Click the session you would like to repeat. (for example, click training 1).

Step 3- From the session home page, select **REPEAT THIS SESSION**.

TRAINING 1

VIEW	EDIT	ENROLLMENTS	COURSE OUTLINE
COURSE REPORTS	REVISIONS	REPEAT THIS SESSION	

FEATURES **SESSION DATE:**
 Tuesday, September 17, 2019 - 9:01am
 Home **LOCATION:**
 Sessions heienz hall

Step 4- Pick how often you would like this course to repeat (e.g. daily, weekly, monthly, yearly).

Step 5- Under **STOP REPEATING**, set the date that you would like the course to stop repeating itself or set a specific date.

STOP REPEATING

After # occurrences

DATE

On E.g., 10/28/2019

Step 6- Check **EXCLUDE WEEKENDS**.

Step 7- click **GENERATE**.

Step 8- Click on the new session (**make sure you click the correct one as it will have the same title as the previous session**)

SESSIONS

SESSIONS	UNPUBLISHED
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FEATURES **Session**
 Home + training 1
 Sessions + training 1

Step 9- Click **Edit**. Review the session and make necessary adjustments (Steps 2-6 from Creating a Series).

Step 10- Click **SAVE**.

Appendix A: Descriptions of Tabs

View- This is like a home screen, it will allow you to see everything within the session

Edit- This take you back inside the session and allows you to edit it.

Enrollments- This is all the participants who enrolled in your session. You are also able to change the settings of how many or who is able to enroll.

Course outline- This shows you all the different parts of the session, every session will need attendance, credit, and certificate.

Course reports- This allows you to see how people answered questions or any activities in the session.

Revisions- This shows who and when each session was edited.

Repeat this session- This allows you to copy your session to make another one. You will just need to re-name it.