RSS TRAINING

Session Workflow

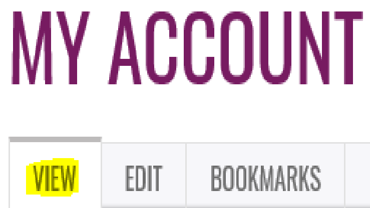
Part One: Access Series

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**.

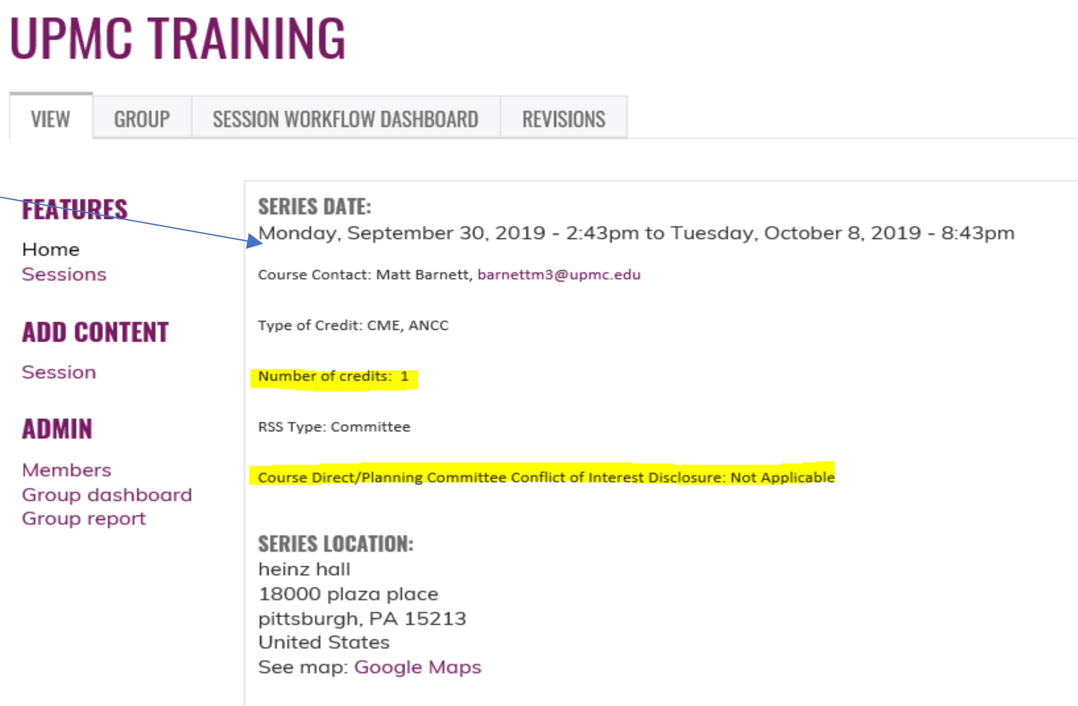


Step 5- Scroll to the bottom of the page and choose the series you are coordinating.

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).

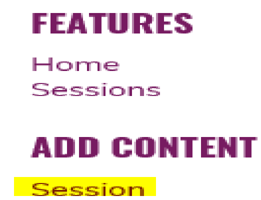
Tip: It may be helpful to Copy/Paste this information into a Word document for reference

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



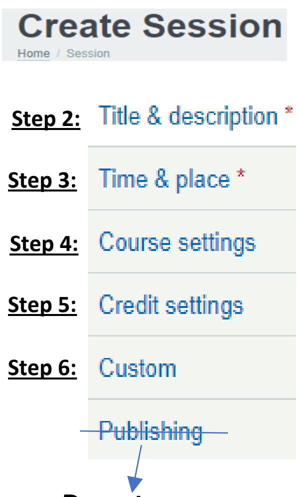
Note: to view/edit existing sessions, choose Sessions.

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**.



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

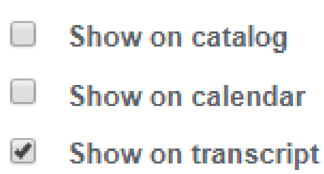
__Step3__ - Click **Time & place.**

- **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)**
  - **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.**

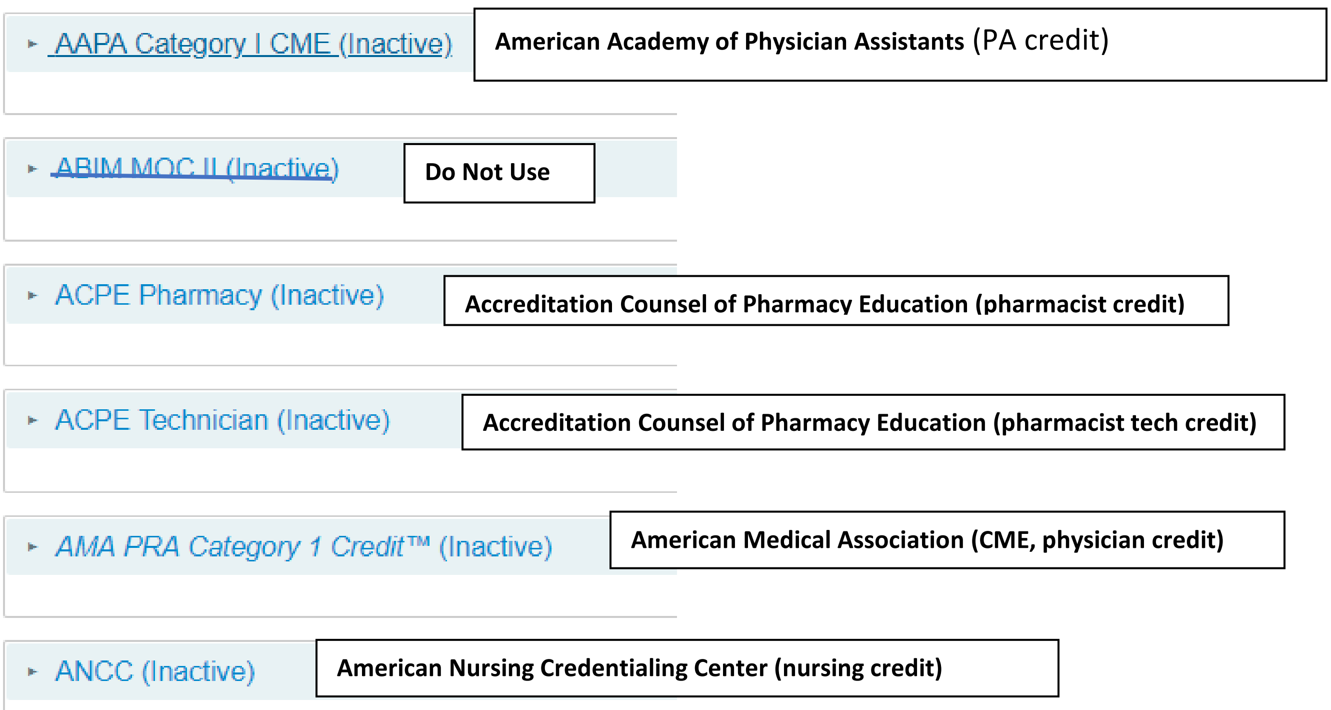
- **Outline display:** Make sure that **Course** is selected
- **Enrollment type:** Make sure that **Course** is selected
- **Duration:** Leave as "0"
- **External ID:** Leave blank
- **Uncheck Show on catalog** and **Show on calendar** __**(IMPORTANT)**__
- **Check Show on transcript**



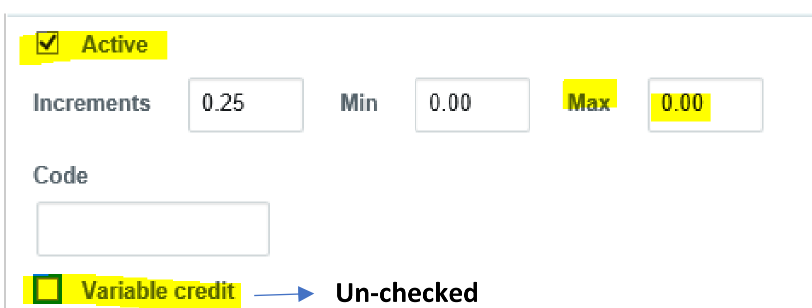
Step 5- Click **Credit Settings** and choose **Course credit settings**

*This step is important because it designates the type and amount of credit that you are awarding. Your 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.



- **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. It the time varies, please adjust acccordningly. **Code** is lefft blank. **Variable credit** is ***un-checked***.

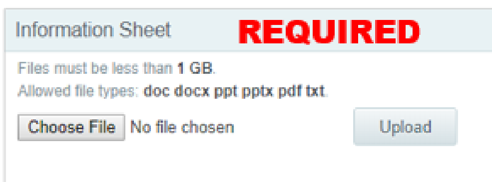


Rembember, do not click "save" unless you are ready to exit.

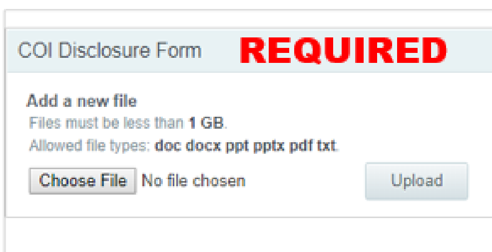
Step 6- Click **Custom.** This section is used to upload required session documentation.

*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 documetation is approved. This step triggers a documentation worflow for each session. **ALL documents must be submitted at least 3 business days prior to the session**).

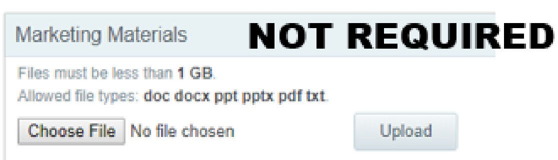
- Upload the following documents. All templates and supporting resources are accessible at http://cce.upmc.com/rss.



Information Sheet: There are several Information Sheet templates. The template assigned to your series is designated on your series home page.



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



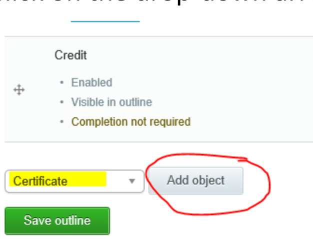
Marketing Materials: Advertisements such as flyers and announcements must be approved prior to the session.

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.**

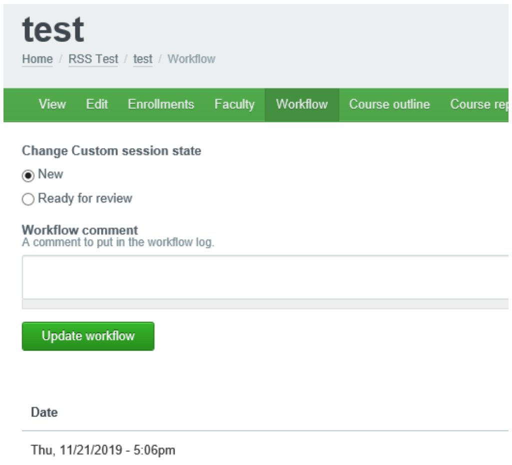
Click on the drop-down arrow and add **Certificate**. Next, **Save Outline**.



Note: Clicking **Save Outline** 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.



Part Three: Repeating a Session

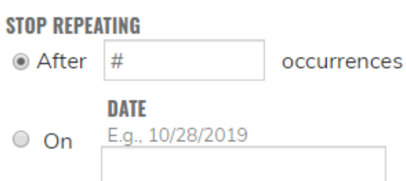
Step 1- Access your series.

Step 2- Choose **Session**s (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**.

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

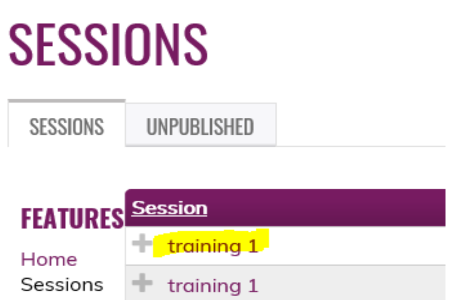
Step 5- Under **STOP REPEATING**, set the date that you would like the course to stop repeating itself or set a specific date.



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**)



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

Step 10-Click **SAVE**.

Appendix A: <u>Descriptions of Tabs</u>

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.