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**.

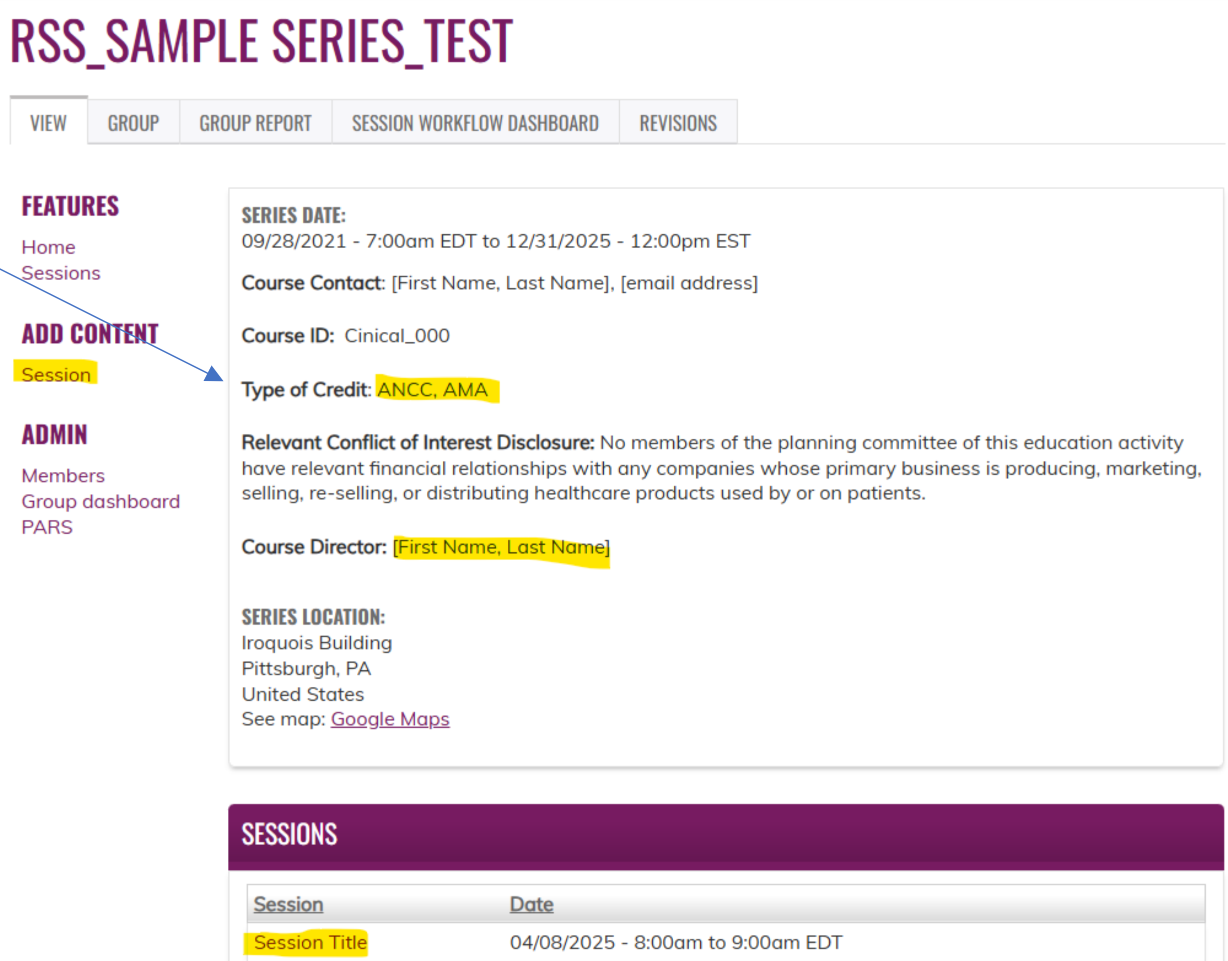
Step 5- Scroll to the bottom of the page and choose the series you are coordinating.

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 series home page choose **Home** under **FEATURES.**

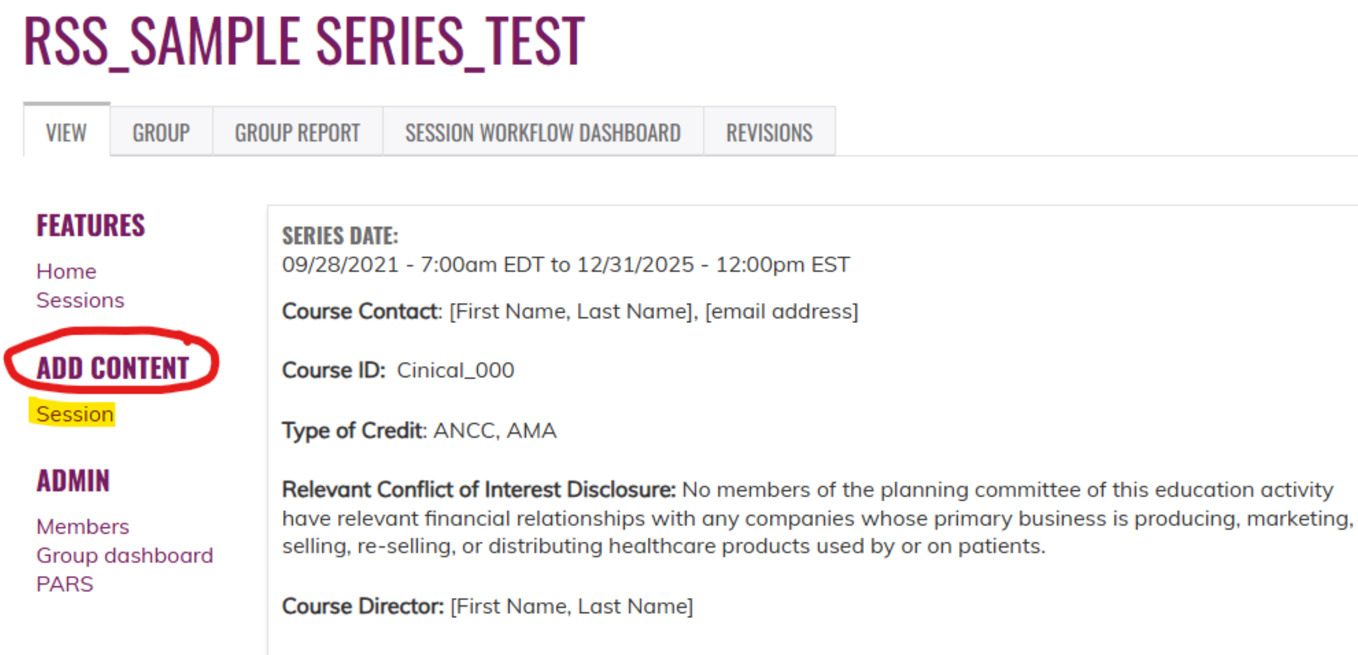
Note: to view/edit existing sessions, select the session title under **Sessions** at the bottom.



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 homepage).

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**.



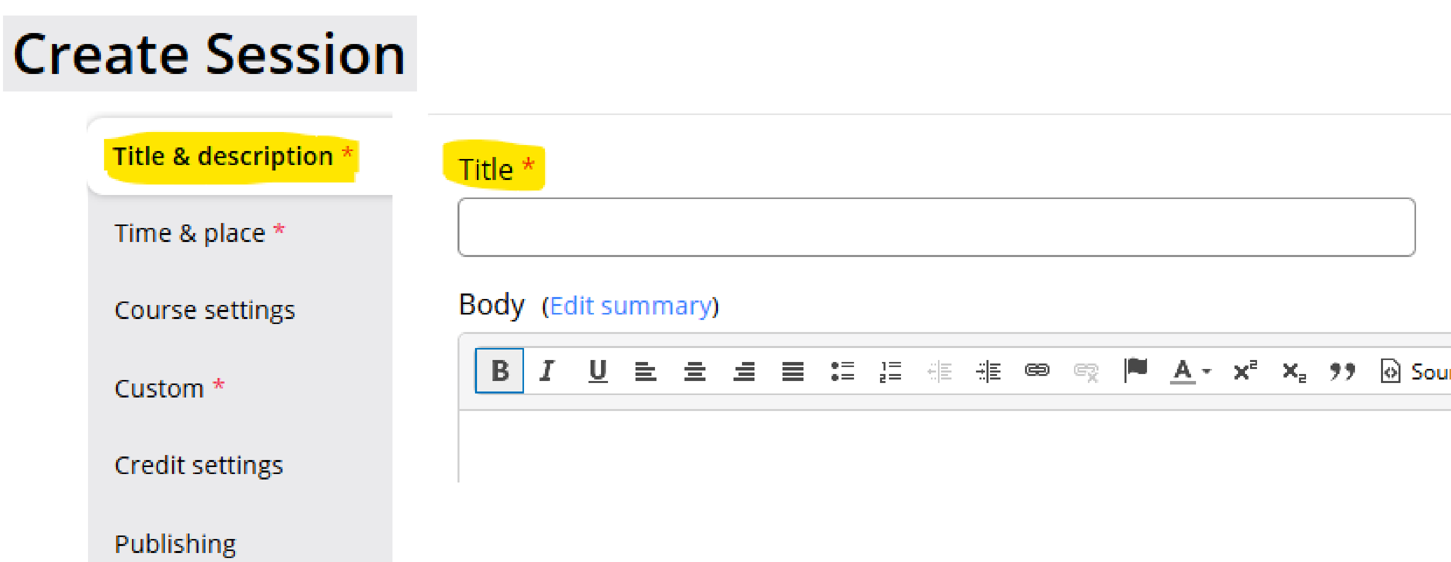
Step 2- Select **Title & description.**

- **Title (required):** Enter the title of the session

  *All clinical series are required to incorporate topic in session title. **Example:**

  Medicine Grand Rounds: Update on Hypertension

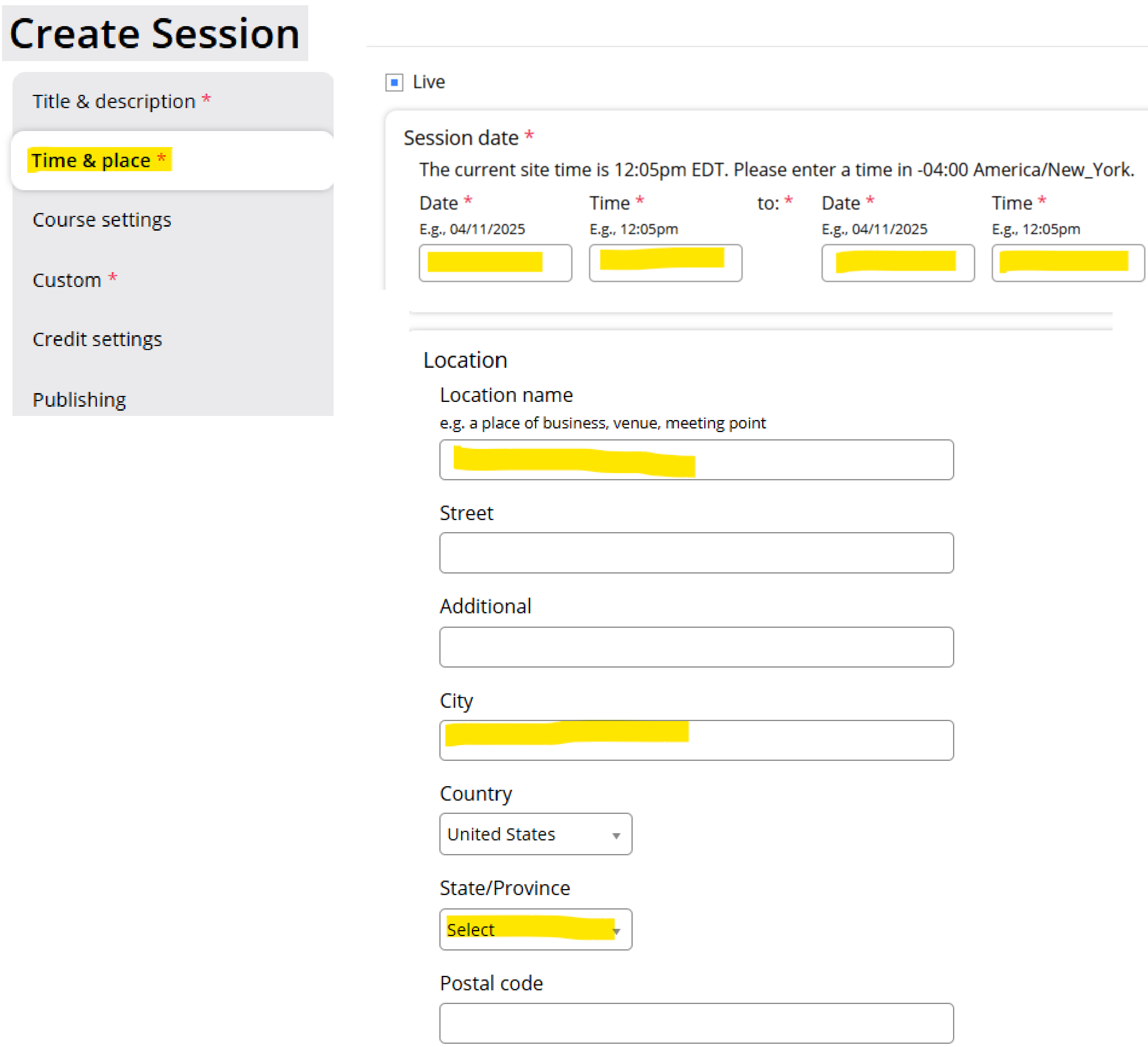
  This does not apply to committees, case conferences, and tumor boards
- Leave the remaining sections blank and proceed to **Step 3**



<u>Step 3</u> - Click **Time & place.**

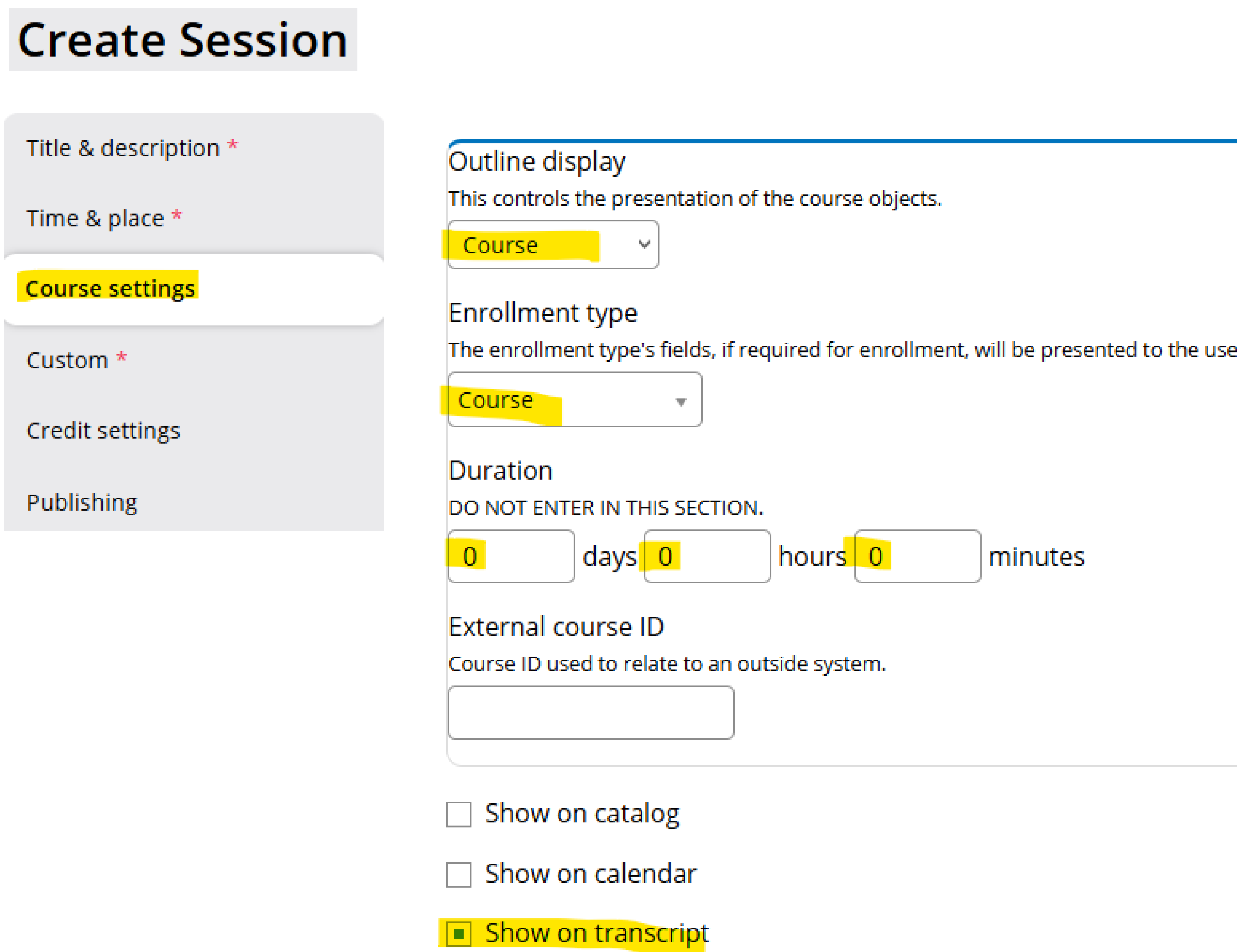
- Leave **Live** checked
- **Session date (required) :** enter when the session will start and finish (i.e. this is the actual date/ time of the activity)
- **Location:** enter the location information **If virtual:** enter "Virtual" as location name
  - **Location name (required)**
  - **Street (not 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:** Leave **Course** as selected
- **Enrollment type:** Make sure that **Course** is selected
- **Duration:** Leave as "0"
- **External ID:** Leave blank
- Leave **Show on catalog** unchecked
- Uncheck **Show on calendar**
- Leave **Show on transcript** checked



Step 5- click **Credit Settings** and set awarded credit types and amounts

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 awarded credit type.

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

Association of Social Work Boards (social worker credit)

American Academy of Physician Assistants (PA Credit)

Do Not Use

Accreditation Counsel of Pharmacy Education (pharmacist credit)

Accreditation Counsel of Pharmacy Education (pharmacist tech credit)

American Medical Association (CME, physician credit)

American Nursing Credentialing Center (nursing credit)

America Psychological Association (psychologists)

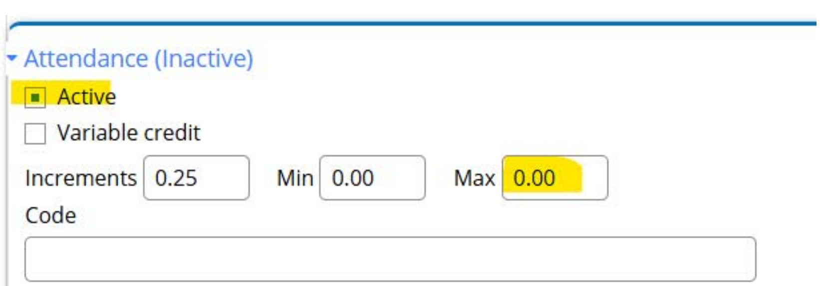
Do Not Use

Other health care professionals will receive a certificate of attendance

- **Designate the amount of credit.** Check **Active**. The minimum credit is always "0". The number of awarded credits should be entered in Max. Credit is based on time. Every 15 minutes of education is equal to 0.25 credits. The default credit type is designated on the series home page. **Code** is left blank. **Variable credit** should remain ***un-checked***.

Checked

Un-checked



***For series approved for AMA PRA Category 1 Credit™**

Copy and paste: **This activity is approved for AMA PRA Category 1 Credit™** in the code box of **Attendance.** Adding this statement allows learners receiving attendance credit to use their certificate for state re-licensure.

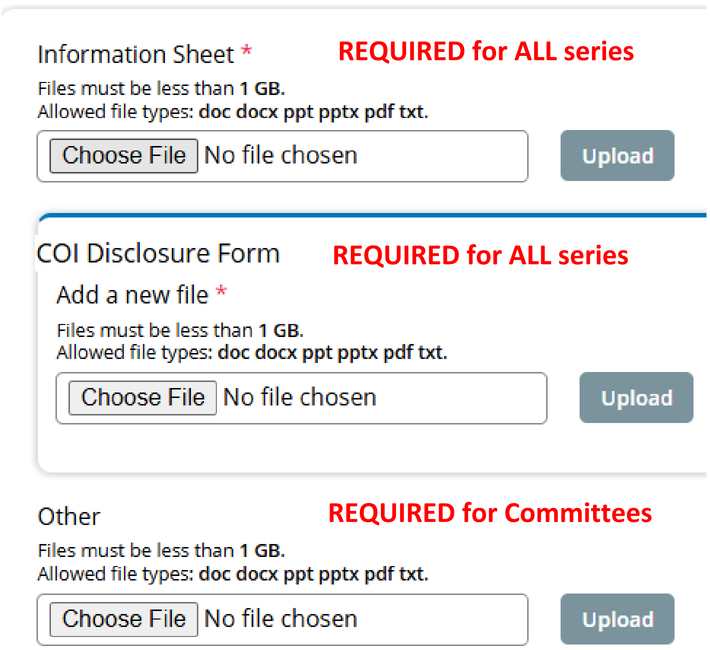
Remember, do not click "save" unless you are ready to exit.

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, sessions need to be submitted and approved BEFORE 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

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.



CE Information Sheet: Available under the RSS coordinator resources tab at http:// cce.upmc.com/rss. If needed, here is an ***overview of the information sheet***

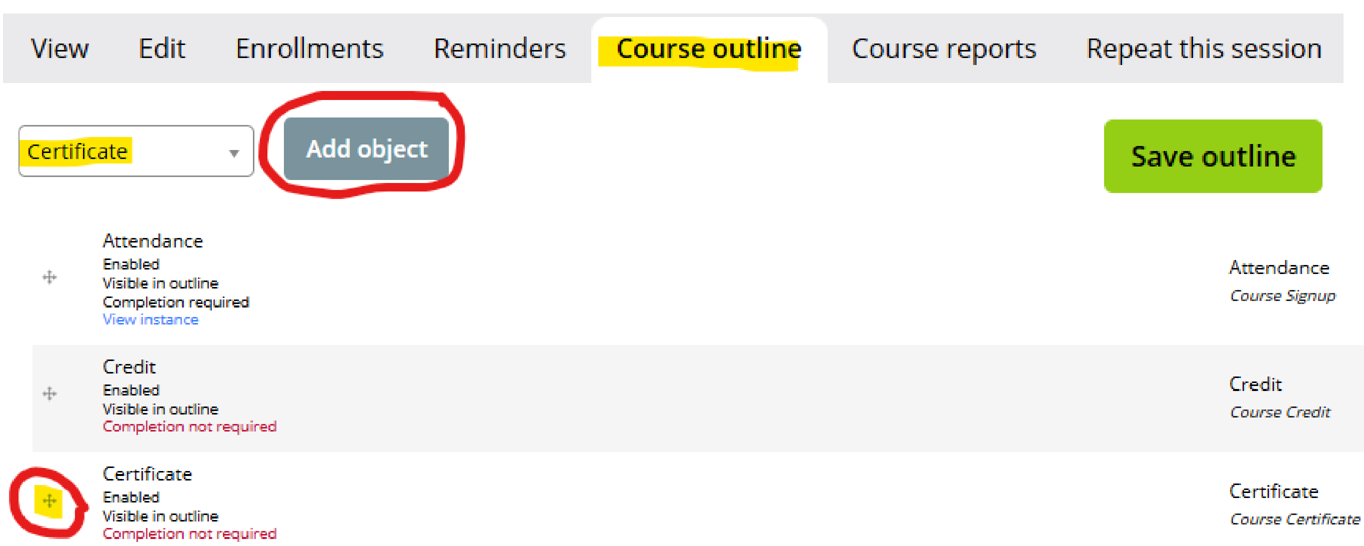
COI Disclosure Form: A COI Disclosure Form is required for each speaker and/or newly assigned moderators. This form is to be completed by the speaker/presenter. If needed, here is an ***overview of the COI***

Other: For each series identified as a committee, please upload an agenda for the session. A sample template is accessible here: ***Committee Agenda Template***

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

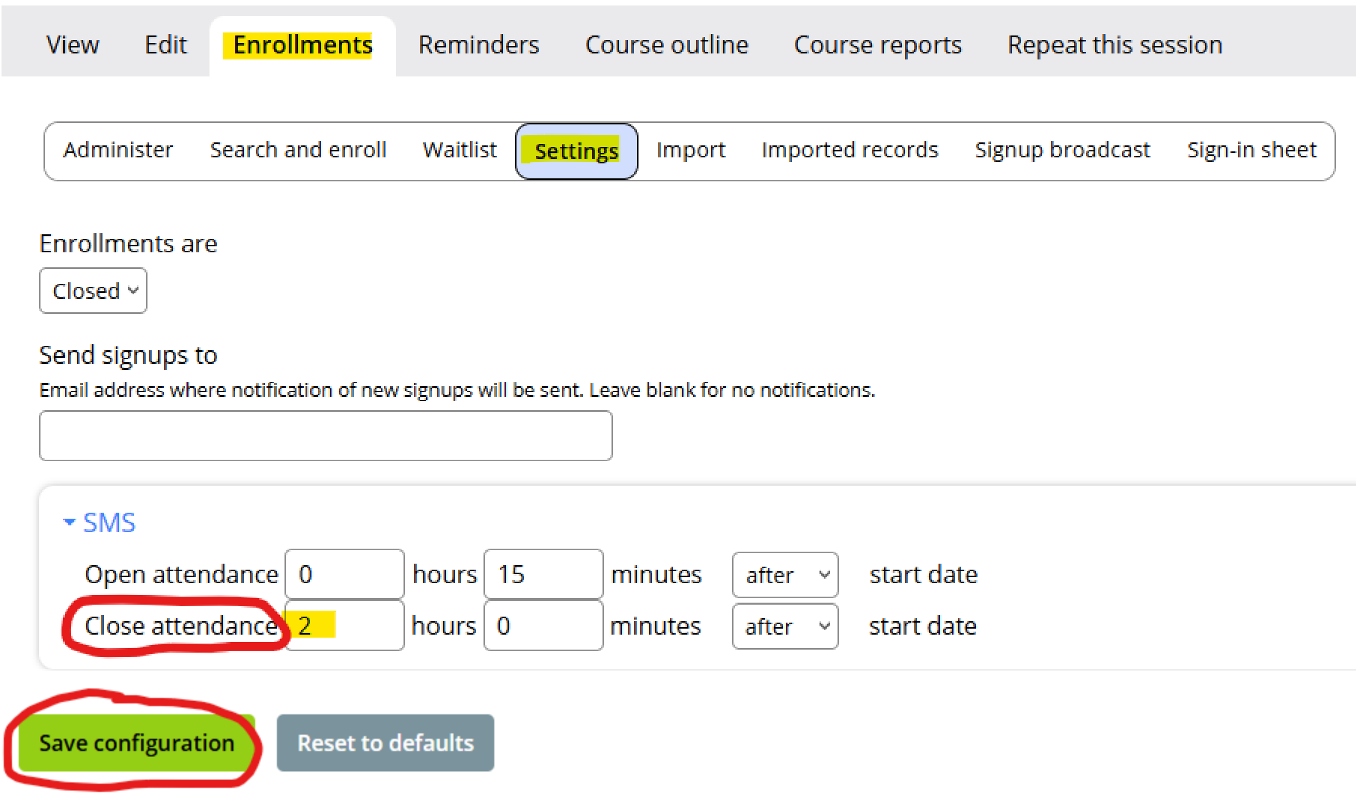
Step 7- From the session home page (not the series home page), choose **Course Outline.**

•Click on the drop-down arrow and select **Certificate.** Click, **Add Object.** A new page will appear. 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.** The arrows will allow you to drag and rearrange the objects. Credit and Certificate will default as *not required*, leave as is, do not make *required*. Be sure to click **Save Outline** or changes will be lost.

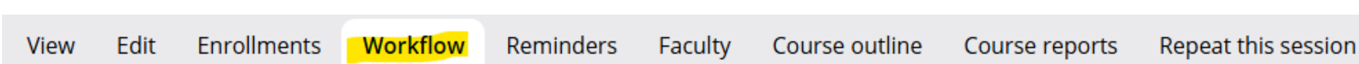


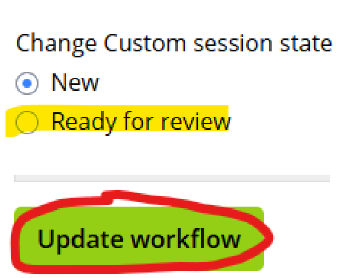
Step 8- Click **Enrollments.** Extend SMS code duration.

*When a session is created, the system defaults the attendance code duration to close attendance 2 hours after the session starts. To allow more time for the learners to submit the session's attendance code, navigate to **enrollments**, then **settings**, and enter the number of desired hours in **SMS- Close Attendance.** You can make this 24 hours, 48 hours, 72 hours, etc., up to 336 hours (14 days). Be sure to select **Save Configuration** at the bottom or changes will be lost.



Step 9- 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 that you are trying to submit, choose **Workflow.**



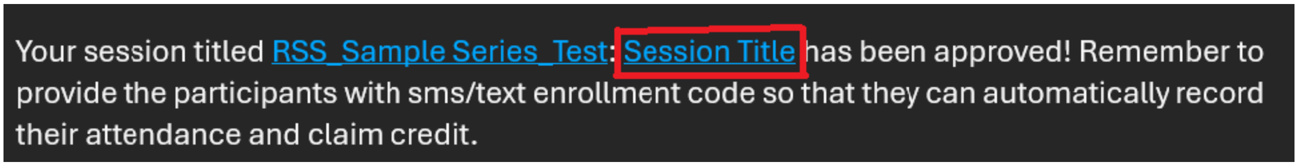


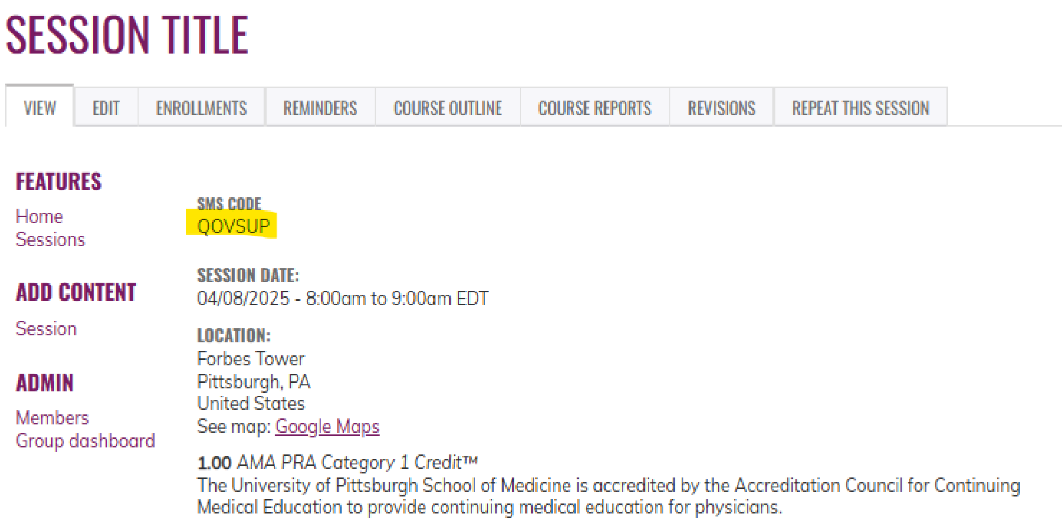
Select the **Workflow** tab.
Change the session state from **New** to **Ready for review"**.
Click **update workflow**. This will start the approval process.

Proceed below for more information...

Step 10- Once the submitted session is reviewed, you will receive an approval email, or a notification that changes are needed. Clicking on the session title from the email (visual below) will take you directly to the session homepage. Selecting the series title will take you directly to the series homepage.

When approved, you will see the SMS code for the learners to enter on the session homepage. If changes are required, be sure to set the workflow as ready for review after the changes have been made. This code can be texted to 412-312-4424 and entered at https://cce.upmc.com/code by the learners to record their attendance.





Part Three: Managing Enrollments

Provide the SMS code to the learners **and** the deadline that you set (***Part Two- Step 8***). There is not a required method for communicating the unique code to the learners along with the phone number to text to, 412-312-4424. This can be distributed via the template slide below, or by other means that best suits your series.

- Sample SMS Text Code Onsite Slide.pptx

Extra Information

What to do for rescheduled or canceled sessions?

How to add someone to a session that missed the cutoff?

Part Four: General Information.

More information is available at http://cce.upmc.com/rss.

To add and remove administrative access for the series please submit a **Series Contact Change Request** and we'll provide access to the requested series

If a new Course Director is taking over for the series, please submit a **Series Director Change Request** so we can update our records

Regularly Scheduled Series Timeline

***Specific information will go out to the course contact and director in advance of each period, the learner evaluation and renewal period will be required for the continuation of the series**

• Learner Evaluation– September through October

•Application Period for NEW Series– October 1 through December 15

•Renewal Period for Existing Series– November through December

Attendance Requirements

Activities that are offered for credit are expected to capture attendance records for all learners regardless of the type of credit approved for the series.

•**ALL** attendees should text the SMS code for each session to record their attendance, whether or not they need the credit being awarded.
•Your series will be flagged if at least 75% of the attendees are not recording attendance. Series with low attendance may not be renewed.

Example:
The series is approved for AMA and ANCC credit. Average attendance is 10 nurses (ANCC credit),10 physicians (AMA credit) and 10 other learners (e.g., medical students, social workers). The total audience is 30 attendees, there should be an aver
least 23 audience members texting the code and recording their attendance through out the year.

How can you help?

•Please encourage all attendees to text the SMS code for each session whether or not they need the credit being awarded.

•**Reminder:** contacts have the ability to manually add a learner's attendance.
In addition to the attendance requirements, series need to meet at least quarterly to remain active

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 and update the uploaded documents.