

Regularly Scheduled Series (RSS) Dashboard Guide and Process Requirements

Questions:

rsc@umn.edu

or

Optional RSS Zoom Session offered Wednesdays at 1:00 pm



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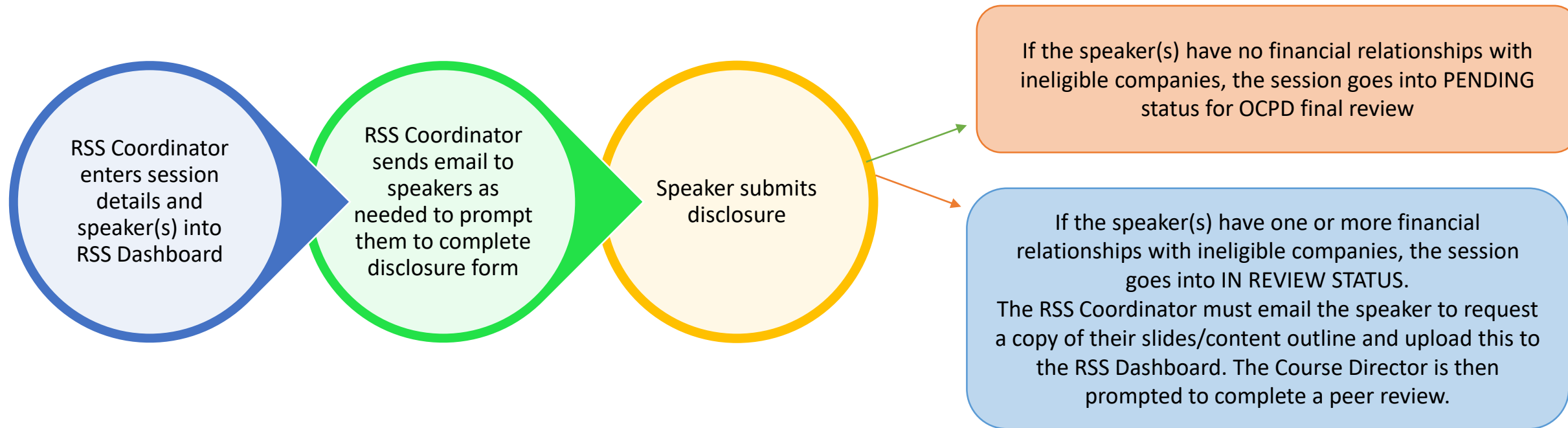
RSS Cycle

- OCPD accredits RSS on a Fiscal Year schedule. We will post the application for the next fiscal year by April 15. The submission due date is June 1 for RSS that start in July.
- OCPD does accept mid-cycle applications.
- Submit an application for your RSS. The application reflects your plans for your overall series, not the individual sessions. You will be asked to provide your anticipated schedule for your RSS on the application.
- OCPD will process and review the application. During this time, the Course Director and Planning Committee members will receive an email prompt to submit their financial disclosure form. An application cannot be marked as approved until all financial disclosures are submitted and reviewed.
- Once the application for your series has been approved, the Course Director and RSS Coordinator will be notified by email. The RSS Coordinator will be granted access rights to the series in the RSS Dashboard where the administration of the individual RSS sessions is handled.



The process at a glance:

- RSS Coordinators must take necessary steps to have their session in a pending status a minimum of 24 hours prior to the start of their session.
- Best practice is to add your speakers at least two weeks prior to the session date.
- Sessions that miss the deadline will be marked ineligible for CE credit.






RSS Dashboard Access

The individual listed as the RSS Coordinator on the RSS Application will be granted administrative access rights to CE Portal. To access:

- Go to z.umn.edu/CEPortal and sign in with your email address and CE Portal password.
- Scroll to the footer of the page and select **Administration** link. In the blue menu on the left > **Activities** > **RSS Dashboard** to view your RSS Sessions. Pay attention to the filters and adjust as needed to access the session dates you need.



Add your session details

Child Status	Details	Topic	QR	Faculty
INCOMPLETE	<p>Series Name: BMT & CT Conference</p> <p>Monday, February 27, 2023 2:00 PM - 3:00 PM</p> <p>Location: MCRB 450 with Zoom option</p> <p>Department: 19</p> <p>Parent ID: 3042</p>	<p>BMT & CT Conference - 2/27/2023</p> <p>   </p>	<p> Single Scan QR</p>	<p> Manage Faculty (0)</p>

1. Edit the topic details. Click on the hyperlinked topic or the pencil icon to access the RSS Activity Editor Screen.
2. RSS Activity Editor details:
 - **Adjust the Name field to reflect your session name.** Note - whatever you put in this field will be reflected on the learners' transcripts. *We have received feedback from learners that they value specificity so we strongly encourage you to reflect the specific title rather than only "Department X Grand Rounds".* Also, if you want to include your speaker's name on the transcript, you should add it here as well, i.e. "Session Title, Presented by Dr. X" You do still have to add faculty to your Manage Faculty column in RSS Dashboard.
 - Type the location of your session. Whatever you type here will pull into your flyer.
 - Double-check your date/time and make any edits. **IMPORTANT:** *If you change the duration of your session, e.g. 12:00 pm – 1:00 pm (1 hour) changed to 12:00 pm – 2:00 pm (2 hours), send an email to rsc@umn.edu so we can reset the number of credits available for the session.*
 - You can also update the objectives to reflect your session-specific objectives if you would like. They default to your overall series objectives.



Add your session details - continued

RSS Activity Editor

Instructions: This screen displays RSS child details and allows for modification. Change the title to reflect the topic of the session. If necessary, adjust hours and location. Specify objectives by clicking the + in the objectives grid. Select specialties, subspecialties, areas of interest, and professions as they apply. Upload any necessary supporting documentation. When finished, click Save & Close.

Name: Enter session-specific title, no need to include the date: E.g. BMT & CT Conference: Treating Patients with Chronic Pain

Location: Type location **Date/Time:** 2/27/2023 2:00 PM to 2/27/2023 3:00 PM

Allow Texting Minutes Prior: 60 **Allow Texting Minutes After:** 15

Objectives

If this activity has multiple accrediting bodies, select a set of objectives to edit them.

☒ Joint Accredited

Summarize updates in diagnosis, treatment and research for various medical conditions. ☐

Compare diagnostic and treatment options. ☐

Discuss appropriate strategies to address. ☐

Insert an objective

Supporting Documentation

Instructions: If you need to upload supporting documents (.doc, .pdf, .ppt) add them here. Note: This is not for uploading faculty or powerpoint presentations.

Not for RSS Activities

Uploaded Files

No files currently uploaded to this activity.

Do not change these fields.

Optional edit objectives to be session specific



Manage Faculty

- **Manage Faculty** – add your session faculty by selecting the Manage Faculty button on the RSS Dashboard for the session. Remember ALL individuals who will present or moderate need to be added to the Manage Faculty for the session.
- Use the dropdown box to do a faculty look-up by their last name. Leave the Request Disclosure button checkmark on; do not request their presentation.

Manage Faculty for BMT & CT Conference - 2/27/2023 (3067)

Rosenberg, Mark (87) rosen001@umn.edu

Rosenberg, Mark (87) rosen001@umn.edu

Rosenberg, Michael (1425) rosen011@umn.edu

Add Faculty

☒ Request Disclosure? ☐ Request Presentation?

	Disclosure Date	Disclosure

If the individual is not available in the drop-down list, that means s/he does not have an account in CE Portal. You will need to create one; see next slide.














How to Create a CE Portal Account

- If the individual is not available in the drop-down list, that means s/he does not have an account in CE Portal.
- Close out of the faculty manager window and select Membership > Add Member from the blue menu on the left.
- Add the individual by entering the required details indicated on screen by a **red asterisk ***:
 - First Name
 - Last Name
 - Degree
 - Profession
 - Email Address
 - Password. *You will need to make up a password, but don't worry about remembering it or sending it to the individual. S/he will receive a welcome email with instructions on how to access their CE Portal account.*
 - Save and you will receive a confirmation message that the individual has been added.
 - Navigate back to the RSS Dashboard and you can immediately add the faculty member.



Manage Faculty – continued

- Once you have added all of your faculty to the session, they will receive one system-generated email prompting them to complete their disclosure form.
- You can check the status of their disclosure in the RSS Dashboard. Be sure to click VIEW ALL if you have multiple faculty.

Faculty	Presentations & COI Status
<div><div> Manage Faculty (4)</div><div>MSK CME Test, MD  </div><div>Disclosure submitted: 2/4/2022 Disclosure: Employment-Abbott Labs Paid consultant-3M Health Care (Relationship has ended) - 02/04/2022</div><div>Jamie Silverstein  </div><div>Disclosure submitted: 2/3/2022 Disclosure: Advisor-2018 Surplus - 02/03/2022</div><div>Bev Test, BSN  </div><div>Disclosure submitted: N/A Disclosure: NO DISCLOSURE ON FILE</div><div>View All</div></div>	<div><div> MSK CME Test, MD Upload Presentation</div><div></div><div><div> Jamie Silverstein Upload Presentation</div><div></div><div><div> Bev Test, BSN Upload Presentation</div><div></div><div>View All</div></div></div></div>



This symbol indicates that your attention is required.

As demonstrated here:

1. “Dr. Test” and “Jamie Silverstein” have reported financial relationships so the symbol is indicating that you need to collect and upload a presentations from these speakers
2. Bev Test, BSN does not have a disclosure submitted so the symbol is indicating you need to follow up with the speaker.

Template Language for Collecting Disclosure Form

Faculty will receive a system-based email prompt to submit their disclosure when you add them to an RSS Session.

It is the RSS Coordinator's responsibility to monitor the status of the disclosure and take additional steps to follow up with the faculty member regarding the submission of their form. Here is sample language for your to use in your communication:

In order for us to have your session be reviewed and approved to offer CE credits, we need you to submit your Disclosure of Financial relationships. Please go to z.umn.edu/CEPortal. Use the email address at which you are receiving this message to sign in to your account. Do not create a new account; you already have one. If you don't know your password, use the *Forgot your password* button and follow the prompts to do a reset. Once signed in, go to the Course Faculty option in the top menu and then you will find Disclosure of Financial Relationships in your Global Tasks. If you need help accessing your CE Portal account or have questions about which financial relationships to report, contact rsc@umn.edu.



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When is Peer Review Required?

- If a speaker indicates that s/he has one or more relationships with an ACCME-defined ineligible company, a peer review will need to be conducted.
- The RSS Coordinator should email the speaker to obtain their presentation (they cannot upload it in CE Portal themselves). *See template language on the next page.*
- Once the RSS Coordinator uploads the presentation, OCPD will begin review and route to the Course Director or another member of the Planning Committee for peer review. The peer review must be completed at least 24 hours prior to the start of the session so OCPD can conduct the final compliance review.

The screenshot displays the 'Ophthalmology & Visual Neurosciences Grand Rounds - 3/7/2023' page. It features a 'Single Scan QR' button and a 'Manage Faculty (2)' section. Under 'Manage Faculty', two speakers are listed: Olufemi Adams, MD and Helena Lam, MD. Each speaker has a 'Disclosure submitted' date and a 'Disclosure' statement. To the right of the faculty list, there are two 'Upload Presentation' buttons. The button for Olufemi Adams, MD is green and has a green checkmark icon. The button for Helena Lam, MD is yellow and has a yellow warning triangle icon. A green arrow points from the green 'Upload Presentation' button to the 'Disclosure' field for Olufemi Adams, MD. A yellow arrow points from the yellow 'Upload Presentation' button to the 'Disclosure' field for Helena Lam, MD. A green callout box on the right says 'No peer review required. Do NOT upload presentation.' and points to the green 'Upload Presentation' button. A yellow callout box on the right says 'Peer Review REQUIRED. Use green icon to upload presentation file. .' and points to the yellow 'Upload Presentation' button.

Speaker	Disclosure submitted	Disclosure	Upload Presentation Button Color	Icon
Olufemi Adams, MD	7/25/2022	Nothing to disclose - 07/25/2022	Green	Green checkmark
Helena Lam, MD	7/27/2022	Stocks or stock options, excluding diversified mutual funds-Sight Sciences - 07/27/2022	Yellow	Yellow warning triangle



Notice this upload presentation icon is always there; only use it if a financial relationship is indicated.

Template Language for Peer Review

When a faculty member discloses one or more financial relationships with an ACCME-defined ineligible company, we have to take steps to mitigate the potential conflict of interest. For RSS, we use Peer Review.

It is the RSS Coordinator's responsibility to monitor the RSS Dashboard and do outreach to faculty who have reported financial relationships so a peer review can be conducted. Here is sample language for your use in that type of communication:

Thank you for submitting your financial disclosure form. Because you have indicated one or more financial relationships with ACCME-defined ineligible companies, we need to engage in a peer review per our accreditation processes. Please email me a copy of your presentation slides by (date). Note, I can accept a draft version of your slides, or if you won't be using slides, a copy of your content outline will work too. We need to allow time for the Course Director and accreditation office to review, so please submit this as soon as possible.

In the event that your faculty has a financial disclosure that includes an employee or owner relationship with an ACCME-defined ineligible company, OCPD staff will need to conduct additional review. Per the [Standards for Integrity and Independence in Accredited Continuing Education](#), employees and owners must be EXCLUDED from participating as planners and/or faculty of accredited education. OCPD staff will work with the RSS Coordinator and Course Director to conduct a review to determine if an exception can be made. Contact rsc@umn.edu for more information.

Create Your Flyer







Accreditation rules require that learners can view the following information PRIOR to the start of each session:

- 1. Accreditation Statement, logo and credit designation statement(s)
- 2. Disclosure summary of Planners and Speakers (even if there are no relationships to disclose)

The CE Portal will generate a flyer that you can use to meet these requirements. Be sure to generate a flyer for every session. You should wait to do so until your speaker(s) have submitted their disclosure.

To create the flyer, click the gray paper icon in the Topic column on the RSS Dashboard.

Child Status	Details	Topic
PENDING	Series Name: Medicine Grand Rounds Thursday, March 2, 2023 12:15 PM - 1:15 PM Location: Live Webinar (Zoom) Department: 10 Parent ID: 2485 Child ID: 2521	Medicine Grand Rounds - 3/2/2023    

Create Your Flyer – continued

Then select Download Microsoft Word Version to generate your flyer.

You can choose to use the flyer as it is for your marketing/announcement for your upcoming session. You can also cut and paste the required elements out of it to include in your own marketing/announcement template.

OCPD provides you with a Welcome Slide template that must be used for each one of your sessions. These slides include a space for you to paste in these required elements from your flyer.













Create Your Welcome Slides

Use the Welcome Slide Template posted on the [RSS Resources Page](#) and update it to reflect the required information:

- 1. Accreditation Statement, logo and credit designation statement(s) – you can cut and paste this from your flyer
- 2. Disclosure summary of Planners and Speakers (even if there are no relationships to disclose) – you can cut and paste this from your flyer
- 3. Child ID # from the RSS Dashboard, as this is what they will use for texting / claiming their credit in CE Portal.

Do NOT generate a QR code from the RSS Dashboard. You should use the one provided to you by email for ALL of your sessions within the fiscal year.

APPROVED	<p>Series Name: Clinical Pathology Conference</p> <p>Tuesday, February 21, 2023 12:00 PM - 1:00 PM</p> <p>Location: Live Webinar</p> <p>Department: N/A</p> <p>Parent ID: 2483</p> <p>Child ID: 2853</p>	<p>61 year-old woman with AML and shortness of breath with hematopoietic progenitor cell (HPC) infusion; 12-year-old female with melena.</p> <div></div>	 Simple Scan QR	<p> Manage Faculty (2)</p> <p>David H McKenna, MD  </p> <p>Disclosure submitted: 2/25/2022</p> <p>Disclosure: Nothing to disclose - C</p> <p>Rayan Sibira, MD  </p> <p>Disclosure submitted: 1/30/2023</p> <p>Disclosure: Nothing to disclose - C</p>
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At the approved RSS Session

- Be sure to share the Welcome Slides with learners prior to the start of the session so they can see the accreditation details, disclosure details and the activity information they need to claim credit/attendance.
- Consider also, including a reminder in the opening and/or closing remarks that ALL learners in attendance must claim credit/attendance within 24 hours of the session and announce again the session's Activity ID number.
- If you're hosting your RSS Session by webinar, use the chat feature to provide a reminder in the opening and/or closing remarks that ALL learners in attendance must claim credit/attendance within 24 hours of the session and announce again the session's Activity ID number.

After the RSS Session

- If an attendee has missed the claim credit/attendance deadline and contacts you for assistance, email us at rsc@umn.edu and include the attendee's first name, last name, email address and the date and child id # of the session so we can update their transcript.
- If an attendee needs assistance with CE Portal account, share our contact information, rsc@umn.edu and we can assist them with CE Portal.

Also - best practice is to ensure that all learners have access to [this resource](#) that provides guidance about CE Portal Account Creation and instructions for claiming RSS Attendance/Credit along with accessing transcript records in CE Portal.



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RSS Attendance/Credit Tracking

Why is it important that ALL attendees at EVERY RSS session take the step to record their attendance/CE Credit?

1. An accredited course is required to maintain attendance records for a period of six years. If an individual is selected for audit by their licensure/certification board, OCPD may be asked to provide attendance records. Your attendees need to make sure we have record of their attendance/credits in the event they are audited by their board.
2. OCPD provides reporting data to our accreditor that includes the attendance information; it is important that we have an accurate count of attendees at each RSS session.
3. Departmental / UMN records. OCPD has been asked by some Departments for the attendance data. It is important for the data to be accurate so we can provide Departments / UMN with confirmed attendance data.



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Learner FAQs

Q: What if I do not want/need CE credit?

A: You are still required to submit your attendance using one of the three available methods so we can maintain accurate attendance records. Also, if it turns out you do in fact need the credits at a later date, this ensures we have record of your attendance/credit and you can access it on your CE Portal Transcript

Q: I am a nurse, but the RSS does not award ANCC credit to nurses. Why should I submit my attendance?

A: Many professional licensing boards are willing to consider course completion documentation and will accept courses for credit based on reciprocal recognition of the types of credit being offered. By submitting your attendance using one of the three available methods, you are ensuring that your attendance is tracked on your CE Portal transcript. You can then submit that documentation to your licensing board for their review and consideration of credit.

Q: I am a resident/student/fellow. Why should I submit my attendance?

A: To ensure that your attendance is captured on the session roster. Departments can pull the roster for all RSS sessions to review who participated. If your Department requires residents/students to participate in RSS, you should ensure your name is recorded on the roster report and your CE Portal transcript.

Q: I do not work for the University of Minnesota (UMN) and do not have a CE Portal account. How do I submit my attendance?

A: CE Portal is not limited to UMN employees; anyone can create an account using an email address. Please create a CE Portal account and follow the steps for either texting/scanning QR code/claiming attendance/credit in CE Portal to ensure that your attendance/credit is recorded on your transcript.

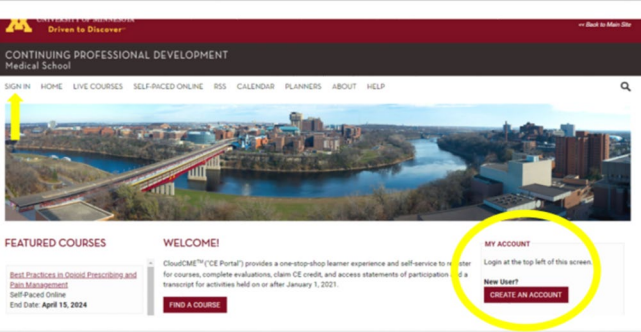
OCPD requests all RSS Course Directors and Coordinators to prioritize the messaging of this requirement to ALL RSS attendees. OCPD has provided the following resources to assist in this communication:

Information for RSS Learners on CE Portal Account Creation and How to Claim RSS Attendance/Credit

Create your account in CE Portal


Effective July 1, 2021, your attendance at Regularly Scheduled Series (RSS) such as Grand Rounds, M & M, Journal Club, etc. that offer accreditation through the University of Minnesota Office of Continuing Professional Development will be recorded in the CE Portal. This is a convenient way to document your participation and maintain your continuing education and attendance records. *Take a few minutes and set up your account today!*

- Get started by going to the website z.umn.edu/CEPortal
- Select the create an account option
 - Use your primary email address and a password of your choice to set up your account; the CE Portal account is not tied to your UMN x500 single sign on.



Be sure to include your cell phone number as you set up your account profile, as this will allow you to simply send a text to have your attendance recorded at RSS sessions. Note that your cell phone number is secure; it will not be used for any purpose other than allowing you to text your attendance.

Welcome Slides Template for RSS Coordinator's Use


Every individual participating in today's session must record their attendance within 24 hours of the conclusion of the session.

Use ONE of the following options:

1. Text the Activity ID from your smartphone
2. Claim credit online in the CE Portal
3. Use UMN's CloudCME App on your phone and scan the QR code

You must have a CE Portal Account. Sign in at the top left of the CE Portal at z.umn.edu/CEPortal or create an account.

NOTE: The CE Portal is NOT connected to other University of Minnesota or M Health Fairview systems. Be sure to include your cell phone number in your CE Portal Account Profile.

Other Strategies to Consider

1. Include it in the opening and/or closing announcements. Verbally remind people to pull out their phones and text their attendance or open the Cloud CME mobile app and scan the QR code.
2. Use the chat feature in Zoom during the RSS session to remind people of the code and prompt them to claim attendance/credit.
3. Email reminders – send a follow up reminder to those who attended the session and remind them that if to claim attendance/credit within 24 hours.

We encourage learners to review their transcripts regularly

RSS attendance/credit data is captured in CE Portal on the learner's transcript. This info is not reflected on a certificate.



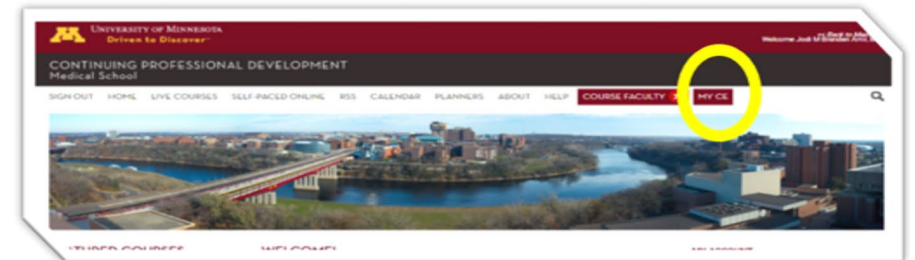
How to access your records:

Visit z.umn.edu/CEPortal to access the CE Portal

- Login into your existing account
- Click on "My CE" in top menu bar
- Select "Transcript" where you can filter by date range to view your transcript record; you can opt to download or email a copy of your transcript from this screen.
- Be sure to check your transcript regularly to ensure your credits are being properly recorded; contact rsc@umn.edu if you notice any discrepancies.

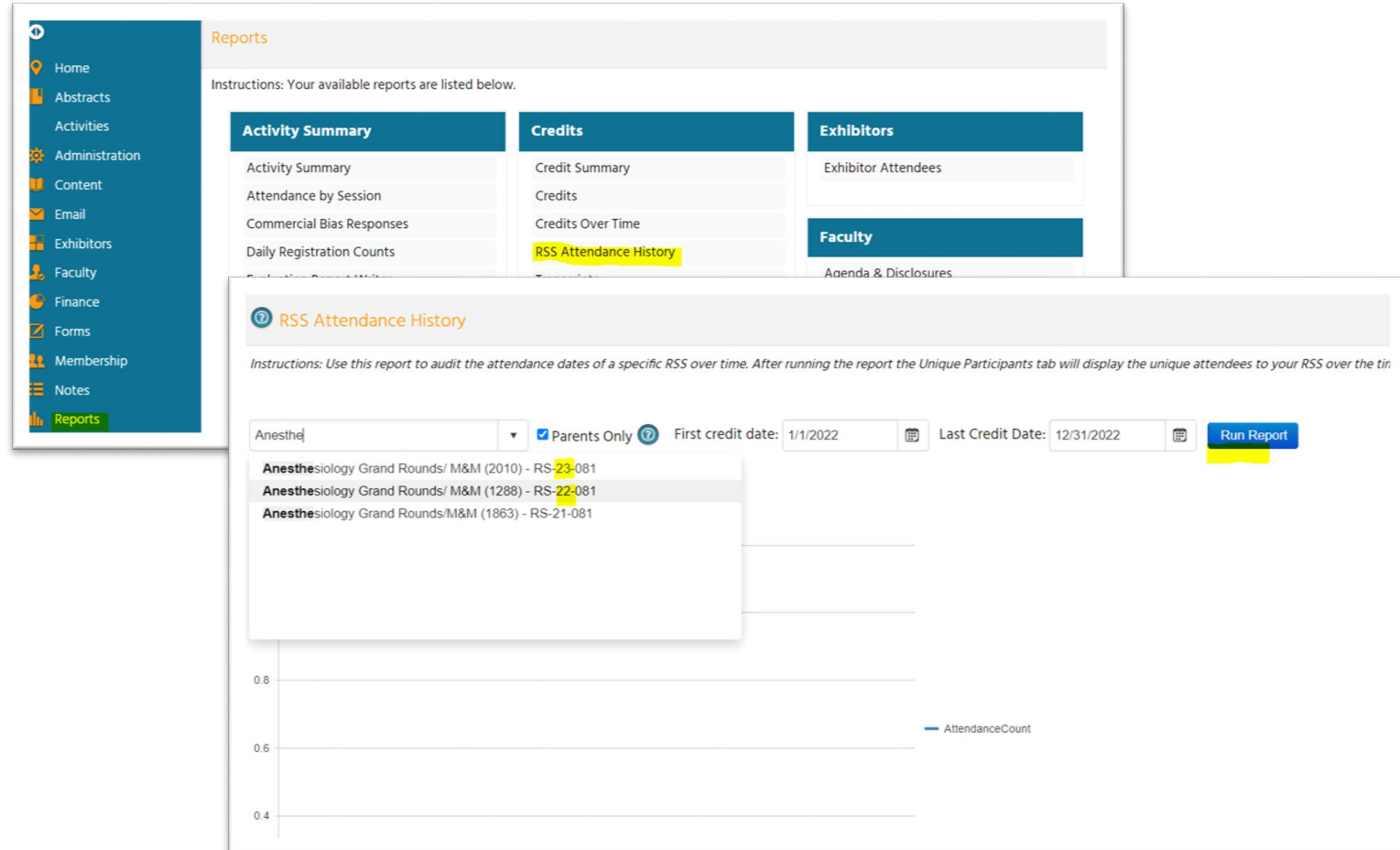
OR – if you have the CloudCME app

- Ensure you are signed in to your existing CE Portal account
- Select "My Transcript" and select view/email.



RSS Coordinator Access to Attendance Data

1. CE Portal (z.umn.edu/CEPortal)
2. Sign in
3. Access Administration link in the footer of the page
4. Select Reports
5. RSS Attendance History
6. Use the search field to find your RSS, pay attention to the RS-22/23 and select the appropriate fiscal year you wish to view. Adjust the dates to reflect the fiscal year as well (FY23 = 7/1/22-6/30/23)
7. Run report



The screenshot displays the 'Reports' section of the CE Portal. A sidebar on the left lists navigation options: Home, Abstracts, Activities, Administration, Content, Email, Exhibitors, Faculty, Finance, Forms, Membership, Notes, and Reports. The main content area is titled 'Reports' and includes instructions: 'Your available reports are listed below.' It features three columns of report categories: 'Activity Summary' (with links to Activity Summary, Attendance by Session, Commercial Bias Responses, and Daily Registration Counts), 'Credits' (with links to Credit Summary, Credits, Credits Over Time, and RSS Attendance History), and 'Exhibitors' (with a link to Exhibitor Attendees). A 'Faculty' section with a link to Agenda & Disclosures is also present. The 'RSS Attendance History' report is highlighted. Below this, the 'RSS Attendance History' report interface is shown, including a search dropdown with 'Anesthesiology Grand Rounds/ M&M (2010) - RS-23-081', 'Anesthesiology Grand Rounds/ M&M (1288) - RS-22-081', and 'Anesthesiology Grand Rounds/M&M (1863) - RS-21-081'. It also includes a 'Parents Only' checkbox, date fields for 'First credit date' (1/1/2022) and 'Last Credit Date' (12/31/2022), and a 'Run Report' button. A line graph area is visible at the bottom, labeled 'AttendanceCount'.

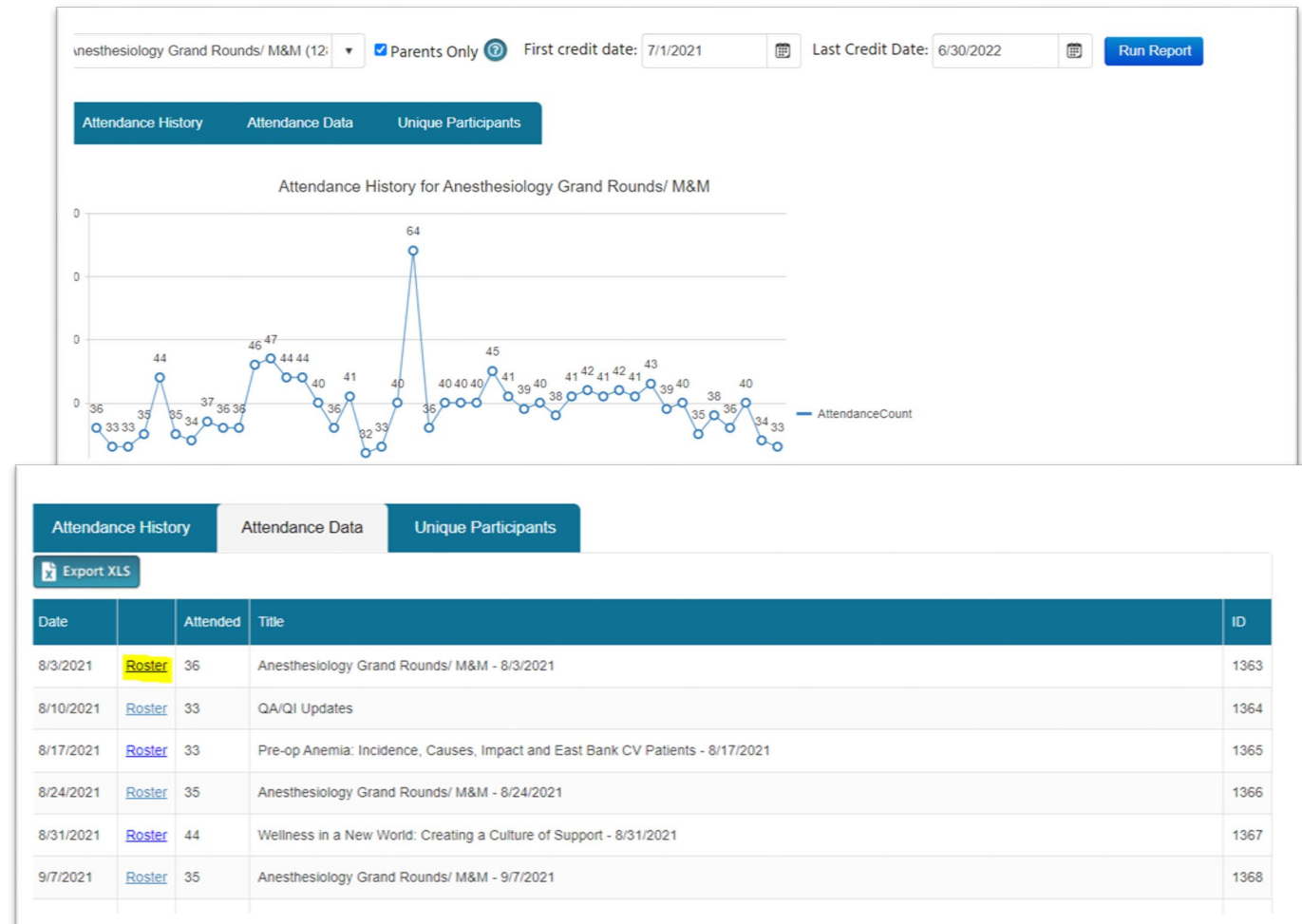
RSS Coordinator Access to Attendance Data

8. The initial view, **Attendance History**, shows an at-a-glance graph.

9. **Attendance Data** shows the data per session. *Note you can export the report to Excel.*

10. **Unique Participants** shows the cumulative number of **sessions*** each learner has participated in. *Note you can export the report to Excel.*

**If your sessions provide more than 1.0 credit per session (they are longer than one hour), be sure to multiply the # of sessions attended by the # of credits/session to calculate a learner's credits earned. Additionally, the learner can see their actual credit count on their CE Portal Transcript.*



Questions?

- Email rsc@umn.edu
- Stop by a scheduled RSS Drop In Session from 1:00-1:30 pm on Wednesdays. Check your calendar for a meeting invitation or email rsc@umn.edu if you need an invitation.