



**Date:** August 2021  
**Subject:** Regularly Schedule Series Update  
**From:** Office of Continuing Professional Development

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It has been just over one month since we launched the management of Regularly Scheduled Series (RSS) in OCPD's tool, [CE Portal](#). We are thankful for your willingness to engage with this new tool and are hoping that you are finding opportunities to streamline your RSS administrative processes within your departments. You can view the listing of RSS activities OCPD accredits [here](#).

As a reminder, we continue to host drop-in sessions each Wednesday from 1:00 – 2:00 pm. RSS Coordinators should have a standing meeting on their calendars. Contact [rsc@umn.edu](mailto:rsc@umn.edu) if you need an invitation. If you have questions and cannot make the session, be sure to send us an email and we can set up a meeting and/or address your question by email.

#### CE Portal Helpful Tips

- Be sure to delete a session date within the RSS Dashboard if the session is canceled.
- User accounts are specific to the user's email address. If you add a faculty member, be sure you do so with their preferred/primary email address. We want to avoid users having duplicate accounts with multiple email addresses.
  - For example, if someone works for the UMN and the VA and has two email addresses, you could opt to list their secondary email address within the administrative assistant section of their profile, so they get copied on system emails, but please do not create two accounts for the same user.
  - If you realize you have made an error when adding a member, contact [rsc@umn.edu](mailto:rsc@umn.edu) and we can help edit the user record.
- It is extremely important that you stress the importance to all of your RSS participants that they must check-in at each session. Instead of signing in as they have in the past, they must now text their attendance OR use the claim credit option in CE Portal. They can do this during the session and up to 24 hours after the session concludes. This is the *only* way we will have record of their attendance and/or CE credits.
  - This is applicable to ALL RSS participants regardless of their profession (physicians, nurses, residents, fellows, and other healthcare professionals) should all check in at each session they attend
  - An account is required in CE Portal in order for the attendee to be able to check-in/claim credit. Be sure to make this [resource about account creation](#) available and utilize the [Welcome Slides](#) to communicate your unique Activity ID they will need to claim credit.
- Did you know that you can review who has checked in at your sessions?

*Access reports on left side of menu of CloudCME page*

*Select RSS Attendance History Report*

*Type/select your activity from the Activity Name Dropdown menu (leave the parents only button checked)*

*Click Run Report button*

*Select the Attendance Data tab that appears*

Use the roster link for the session date you are interested in reviewing (export to XLS is available)

- Here is some template language that many RSS Coordinators have asked for. Once you have assigned a speaker to a session, they will be assigned the task to complete the disclosure form if they do not have a current one in the system. The system will send them an automatic email, but many RSS Coordinators opt to send a direct communication from their inbox to help direct speakers to complete the task in a timely fashion. Use this language if you choose and modify it to best fit your needs:

*Accredited continuing education requires that anyone who presents and/or controls the content of an accredited activity to disclose to the accredited provider and learners any financial relationships commercial interests/ineligible companies. In the event that you have a relationship, we will work with the Course Director to take steps to mitigate any potential conflicts of interest. The submission of your disclosure form is online and I've outlined the steps you need to take below. **Please submit your disclosure information as soon as possible, your response must be received before we can offer CE credit***

1. Go to [OCPD's CE Portal Page](#) and select Sign In in the upper left corner.
2. Select the "Forgot Your Password" button, enter your email address at which you are receiving this message, and follow the instructions in the automated email that you will receive.
3. Once logged in, you will see "Course Faculty" in the top menu bar and this is where you will be able to submit your financial disclosure information.

**FY21 Close-outs:**

**If you have not already done so, be sure to complete the required tasks for FY21:**

1. Ensure your attendance spreadsheet is complete and in your shared Google Folder. Note you must use the template provided that reflects cumulative attendance for the entire FY21 series.
2. Save a copy of your final budget to your Google Folder. [Use this template.](#)
3. Send an email to [rsc@umn.edu](mailto:rsc@umn.edu) with the subject line "RSS Closeout Request 21-xxx: [title of your RSS]. You must provide a final budget

OCPD will review your documentation to ensure that you submitted a Session Details Form for each session that is listed on the attendance spreadsheet. If you are missing any, OCPD will email you and provide you with two weeks to submit any missing information. Only sessions that have a compliant Session Details Form and Attendance data will be eligible for credit.

Remember, you do not have to submit the Financial Disclosures/Conflict of Interest Review because you provided those details on the Session Details Form for each session. Also you do not need to conduct an evaluation or send an evaluation summary for closeout because CPD will be sending out an online evaluation to all RSS learners.