



MEDICAL SCHOOL

UNIVERSITY OF MINNESOTA

Driven to DiscoverSM

Office of Continuing Professional Development (OCPD)

**FY22 Regularly Scheduled Series (RSS)
Coordinator Training Manual**



OCPD Contact Information:

Email: rsc@umn.edu

Phone: 612-626-7600

OCPD staff is working remotely. Email is the preferred method of contact.
Voicemails will be returned within two business days.

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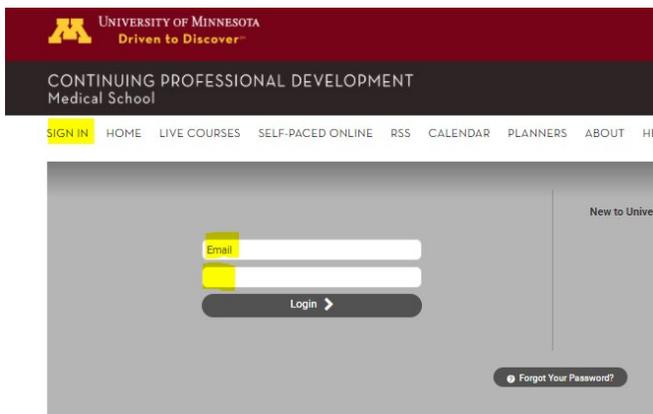
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RSS Dashboard Introduction

CloudCME® offers the RSS Dashboard to manage individual RSS sessions or children, as they are often referred to. Using the RSS Dashboard, you can enter the child activity title, location, objectives, specialties, assign faculty, manage faculty disclosures, and upload faculty presentations. Additionally, you can generate an activity flyer; this flyer should be posted/displayed to learners prior to the start of the activity, as it includes your onsite disclosure information and accreditation details.

NOTE: An OCPD Administrator will assign permission to your account via Administration > User Screen Access to view this screen. You will receive permission once your [FY22 RSS Application](#) has been reviewed and processed. You will receive an email notification once this is complete. If you do not have access to the RSS Dashboard, please contact OCPD at rsc@umn.edu.

First, log into [CloudCME](#) by clicking **Sign in**, enter your email, password and click the Login button.



At the bottom of the screen, you will see the **Administration** field. Click on the word **Administration**.



Then, from the main menu, go to **Activities > RSS Dashboard**.

NOTE: This screen may vary depending on the access you have been given.



RSS Icons

The columns in the RSS Dashboard contain several icons: Status, ID, Topic, and Faculty. Below is the definition of each icon.

Status column - This column contains a status icon. As the planning process continues through the approval state, the icon displayed in this column will continue to update.

PENDING

ID column – This column contains the RSS Parent ID and the RSS Children IDs.

Topic column

RSS Flyer - Click this icon, and the system will generate an activity flyer for distribution. Faculty must be assigned to the activity before a flyer can be generated. You can customize the flyer template for a unique RSS child activity or customize for an RSS parent activity, which will be applied to all child activities of the parent. See the [RSS Flyer](#) instructions below.



Calendar - Click this icon, and the calendar will display for you to view and access the scheduled RSS child activities.



Trash - Click this icon to deactivate/delete an RSS child activity. A message will display asking you to explain the reason why you are deleting the RSS child activity. Enter text and click **Add**. **Note.** This note will be emailed to the Office of Continuing Professional Development.



QR Column

There is a QR code feature that requires the users to be logged in to the CloudCME® app. OCPD will not be utilizing this function in FY22 but will consider it in the future; disregard this column at this time.

Single Scan QR

Faculty column

This column contains the following icons for your use. Once you have selected the faculty member from the drop-down list, click the green plus icon to add the user as a faculty member for the RSS child activity.



Once a user has been added as a faculty member, two additional icons display.

Envelope - Click this icon and a window will display for you to create an email message for faculty members. You can email both coordinators and faculty. When an email is sent, the system will record this action and place a note in the Notes section.



Red Minus - Click this icon to remove a faculty member from the RSS child activity.



Upload Presentation - An icon displays in this column when one or more faculty have disclosed a financial relationship in the disclosure form. This icon signals to upload the faculty member's presentation so that the peer review process can begin. Only RSS Coordinators have the role to upload presentation files. In instances of case presentations or other presentations where slides will not be used, a content outline can be submitted in lieu of presentation slides.



RSS Status Definitions

Incomplete: This status means that faculty and disclosures have not been assigned yet. RSS Coordinators/Owners will see Incomplete by default until faculty have been assigned, and disclosures have been completed. This is the initial default status of every RSS child activity.

Pending: This status represents faculty who have completed a disclosure and there was no financial relationship declared (i.e. no financial relationships were disclosed, or COI was resolved).

In Review: This status represents faculty who have a completed disclosure and at least one financial relationship has been declared. The faculty member's presentation or content outline has been uploaded by the RSS Coordinator, triggering an email to be sent to the RSS Peer Reviewer (usually the Course Director), kicking off the Conflict of Interest Review process.

Approved: This represents faculty who have completed a disclosure, either no financial relationships were declared or, if identified, resolution of conflict of interest has been satisfactorily completed.

Rejected: This represents faculty who have completed a disclosure, a financial relationship has been declared and the conflict of interest is not able to be satisfactorily resolved. The activity is rejected. The coordinator would remove this faculty member and would need to select a new faculty member and begin the process again.

Using the RSS Dashboard

The RSS Dashboard provides a minimized view to easily manage RSS activities. You will see all activities that you have been assigned as coordinator/owner **except** those that are approved (unless Approved is selected in the Status search).

There are a variety of ways to search the RSS Dashboard. You can search by day, week, month, date range, or status.

[RSS Dashboard](#)

Instructions: This screen shows upcoming RSS. If objectives, faculty, or disclosures are missing the activity is considered incomplete, cannot be approved and credit cannot be awarded. You can edit the activity by clicking its name. To assign faculty, enter a lastname and select, then click Add. If no disclosure is on file, the faculty member will be contacted by email to complete it. Use the date selectors if you need to view a different time frame.

Day Week **Month** 3/31/2018 3/31/2019 Status: Pending

In the below screenshot, a date range has been entered, and the Status is set to "Pending". You can also search by changing the status to All, In Review, Incomplete, Approved or Rejected.

NOTE: Please see the section titled [RSS Status Definitions](#) provided above for a definition of each status.

Instructions: This screen shows upcoming RSS. If objectives, faculty, or disclosures are missing the activity is cannot be awarded. You can edit the activity by clicking its name. To assign faculty, enter a lastname and se member will be contacted by email to complete it. Use the date selectors if you need to view a different tir

Day Week **Month** 3/31/2018 3/31/2019 Status: Pending

Export XLS

Status & ID	Series	Topic	Date	Faculty
				Jennifer

The data table contains several columns to assist you in managing the activity planning process. Columns include: Status, ID, Series, Topic, Date, Location, Department, Faculty, Faculty Disclosure, Planners, Upload Presentation, Objectives, Audience, and Owners/Coordinators.

Day Week **Month** 12/3/2018 5/16/2019 Status: Pending Owner: Administrator: -- Select --

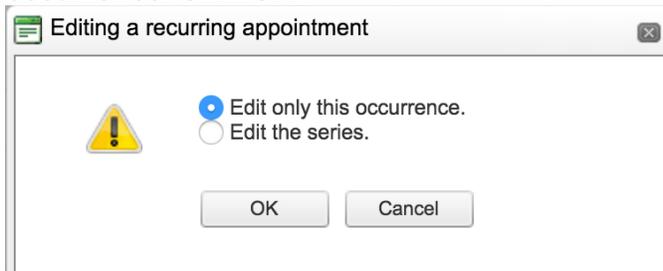
Export XLS Save Layout Reset

Status	ID	Series	Topic	Date	Location	Department	Faculty	Disclosure
PENDING	Parent: 371 Child ID: 374	Tom RSS Test		Friday, December 21, 2018 10:00:00 AM - 11:00:00 AM			Kory Munk, MD Allison Bergstedt, MD	Kory Munk, MD: Nothing to disclose - Disclosure Submitted: 9/17/2018 Allison Bergstedt, MD: Nothing to disclose - Disclosure Submitted: 4/12/2019
PENDING	Parent: 670 Child ID: 671	M & M Conference 2019		Monday, March 18, 2019 11:49:45 AM - 12:49:45 PM			Thomas Welch, MD	Thomas Welch, MD: Nothing to disclose - Disclosure Submitted: 9/12/2018

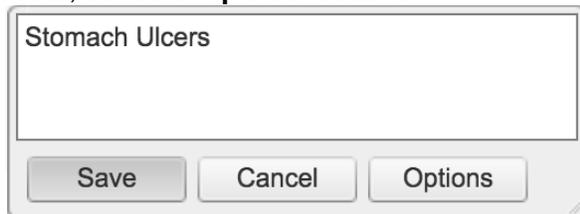
Click the calendar icon in the **Topic** column and go to the date of the first RSS child activity.



Enter each RSS child activity as you plan topics throughout the year. To edit a child activity, double-click on the child activity in the calendar. The radio button will default to **Edit only this occurrence**. Click **OK**.



You can edit the title of the child activity. If you need to revise the day or time the activity will occur, click the **Options** button.



A new window will display. You can edit the date and time of the child occurrence and click **Save**.

Click the child activity from the RSS Dashboard, with the updated title, and a new screen will display. Enter the RSS child activity information on this screen.

Enter the RSS child activity Name, Location, Date/Time, Allowing Texting Minutes Prior, Allow Texting Minutes After, and Objectives. Upload a file for the activity and select the specialties that are the target audience for the activity.

NOTE: The child activity title will display on users' transcripts.

When all information has been entered, click the **Save** button.

To customize the RSS flyer, click the RSS Flyer icon and then click **Download Microsoft Word Version**. The flyer will open as a Word document. Make the desired changes and save the document to your desktop.

Parent: 448 Child ID:449	M & M Case Conference	M & M Case Conference - 2/3/2019   	Sunday, February 3, 2019 12:24:16 PM - 1:24:16 PM
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To associate the revised flyer with a unique RSS child activity, click the **Upload Flyer** button, select the revised flyer from your desktop, and click the **Submit** button.

If you want to associate the revised flyer to the RSS parent for use per each child activity of the parent, click the **Upload Flyer** button, select the revised flyer from your desktop, and check the checkbox **Use flyer/templates for Parent?**. Then, click the **Submit** button.

Instructions: If you would like to upload a custom flyer for this event, please click the upload flyer button below. When finished, please click submit and the flyer will update.

Use flyer/template for Parent?

[Download Microsoft Word Version](#)

Heart Series - 1/27/2020
Provided by Medical Institution

1/29/2020 11:01:47 AM
Tyler X Browne, MD

The RSS Flyer Includes the Disclosure information for your RSS Course Directors, Planning Committee Members and Speaker(s) once your speaker has submitted their disclosure form. You can use this as your Onsite Disclosure Summary and do not need to create one separately. Speakers can still announce disclosure information prior to initiating their presentation.

Add faculty to the child activity in the **Faculty** column. Type in the letters of the faculty member's last name and select from the drop-down list. Then, click the green + button.

NOTE: If the faculty member does not have an account in CloudCME®, contact your administrator to either gain access to Membership Manager or have the faculty member added into the system.

Status	ID	Series	Topic	Date	Location	Department	Faculty	Disclosure	Upload Presentation
PENDING	Parent: 448 Child ID:454	M & M Case Conference	M & M Case Conference - 3/10/2019   	Sunday: March 10, 2019 12:24:16 PM ~ 1:24:16 PM			Donnelly, Jennifer (101) jdonnelly@multiweb.com Donnelly, Jennifer (386) jdonnelly@noemail.com	NO DISCLOSURE	

The faculty member will be added to the RSS child activity.

NOTE: The Status column may change from PENDING to IN REVIEW. The status can change to IN REVIEW because the faculty member declared a financial relationship on their disclosure.

Date	Location	Department	Faculty	Disclosure	Upload Presentation
Sunday, March 10, 2019 12:24:16 PM - 1:24:16 PM			Jennifer Donnelly, MD <input type="text"/> + Email Faculty: <input checked="" type="checkbox"/>	Jennifer Donnelly, MD - NO DISCLOSURE	Jennifer Donnelly, MD [NO FILE UPLOADED]

If the faculty member declares no financial relationships on their disclosure form, the status will update to PENDING, and the RSS child activity is ready to be marked as APPROVED by the OCPD Activity Administrator. The status will update to COMPLETE. In this case, the faculty member does not submit their presentation file/content outline and there is no need for the Course Director will not need to complete a Peer Review.

NOTE: The browser refresh button does not refresh the RSS Dashboard. Instead, you should refresh your RSS Dashboard by reselecting Activities >> RSS Dashboard from the left navigation menu. You may need to do so after adding or changing a faculty member to confirm that your child session moved from an “Incomplete” to “Pending” or “In Review” status.

If the faculty member declared a financial relationship(s), this will be noted in the Disclosure column, and the status will update to IN REVIEW.

Status	ID	Series	Topic	Date	Location	Department	Faculty	Disclosure	Upload Presentation
INCOMPLETE	Parent: 275 Child ID:310	Application for an RSS	Application for an RSS - 4/25/2019	Thursday, April 25, 2019 7:00:00 AM - 8:00:00 AM	Room 1	Pediatrics	<input type="text"/> + Email Faculty: <input type="checkbox"/>	NO DISCLOSURE	
IN REVIEW	Parent: 720 Child ID:722	Tumor Boards 2019 - Jen Ott Test	Tumor Boards 2019 - Jen Ott Test - 4/25/2019	Thursday, April 25, 2019 3:04:00 PM - 4:04:00 PM			Jennifer Donnelly, MD <input type="text"/> + Email Faculty: <input type="checkbox"/>	Jennifer Donnelly, MD, Speakers Bureau - Disclosure Submitted: 4/16/2019	Jennifer Donnelly, MD [NO FILE UPLOADED]

If faculty have one or more disclosed financial relationships, you will be instructed to upload the presentation (PPTX, PPT or PDF), which will trigger a peer review form in the Attendee Portal. You should reach out to the faculty member(s) to request them to submit their presentation slides or a content outline directly to you by email. You then need to upload it to the RSS dashboard. Once you do so, the status will update to IN REVIEW on the dashboard. (***The faculty member cannot upload the presentation file themselves within the CE Portal.*)

Remember to allow time for Peer Review, an activity will not be approved until the Course Director completes her/his review in the CE Portal and OCPD staff has marked it as approved. **NOTE:** Click the upload icon in the Upload Presentation column to upload the faculty member’s presentation for peer review.

IN REVIEW	Parent: 14118 Medicine Grand Rounds, Child ID:14121	Medicine Grand Rounds	Medicine Grand Rounds - 4/10/2018	Tuesday, April 10, 2018 7:00:00 AM - 8:00:00 AM			Karl Wilkens, NA Speakers Bureau-Abbott Laboratories - Disclosure Submitted: 3/28/2018 Jennifer Donnelly, DO: Speakers Bureau-Abbott Laboratories - Disclosure Submitted: 3/27/2018 <input type="text"/> + Email Faculty: <input type="checkbox"/>		Internal Medicine
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One or more relationships exist for Karl Wilkens. Please obtain the presentation for this faculty member and upload it to begin the peer review process.

OK

Once the faculty member's presentation has been uploaded, users who have a role of Peer Reviewer will receive an email with a link to the COI Resolution form. The presentation title, faculty name, a link to the uploaded presentation, stated disclosures and resolution questions are included in the form. Based on the question responses, this will change the status to REJECTED or PENDING.

NOTE: Only one peer reviewer needs to complete the review and COI Resolution form. If additional peer reviewers try to complete the COI Resolution form, they will receive a notification that the review has been completed and no further action is needed.



Thank you Karl Wilkens for participating as a Peer Reviewer.

Test Cancer Center Grand Rounds 2018 - 4/4/2018** will occur on Wednesday, April 4, 2018 and we need you to review a potential issue.

Please click the link to review the faculty, their presentation and their disclosure and make a determination. [Click here to go to the Peer review form](#)

Thank you!

[RSS Guidelines page](#) has resources for RSS Coordinators, Course Directors & Learners

- **FY22 RSS Welcome Slides Template**
 - Update this template with the Child ID for your session to communicate to your participants how they should claim attendance/credits for each session. **NOTE:** the Child ID changes with each session date so you will need to do this each time. An activity must be in APPROVED status for the Activity ID to be functional for attendance/credit claiming.
 - OCPD staff will review the RSS Dashboard on a regular basis. In the event you have an urgent request for OCPD staff to assist you with a Child Session, email rsc@umn.edu with the subject line “URGENT Child ID XXX” to direct our attention to a request that requires our priority attention.
- **CE Portal Account and RSS Attendance Resource for Learners** – share this with your learners especially at the beginning of your FY22 RSS Season and to those that are new.