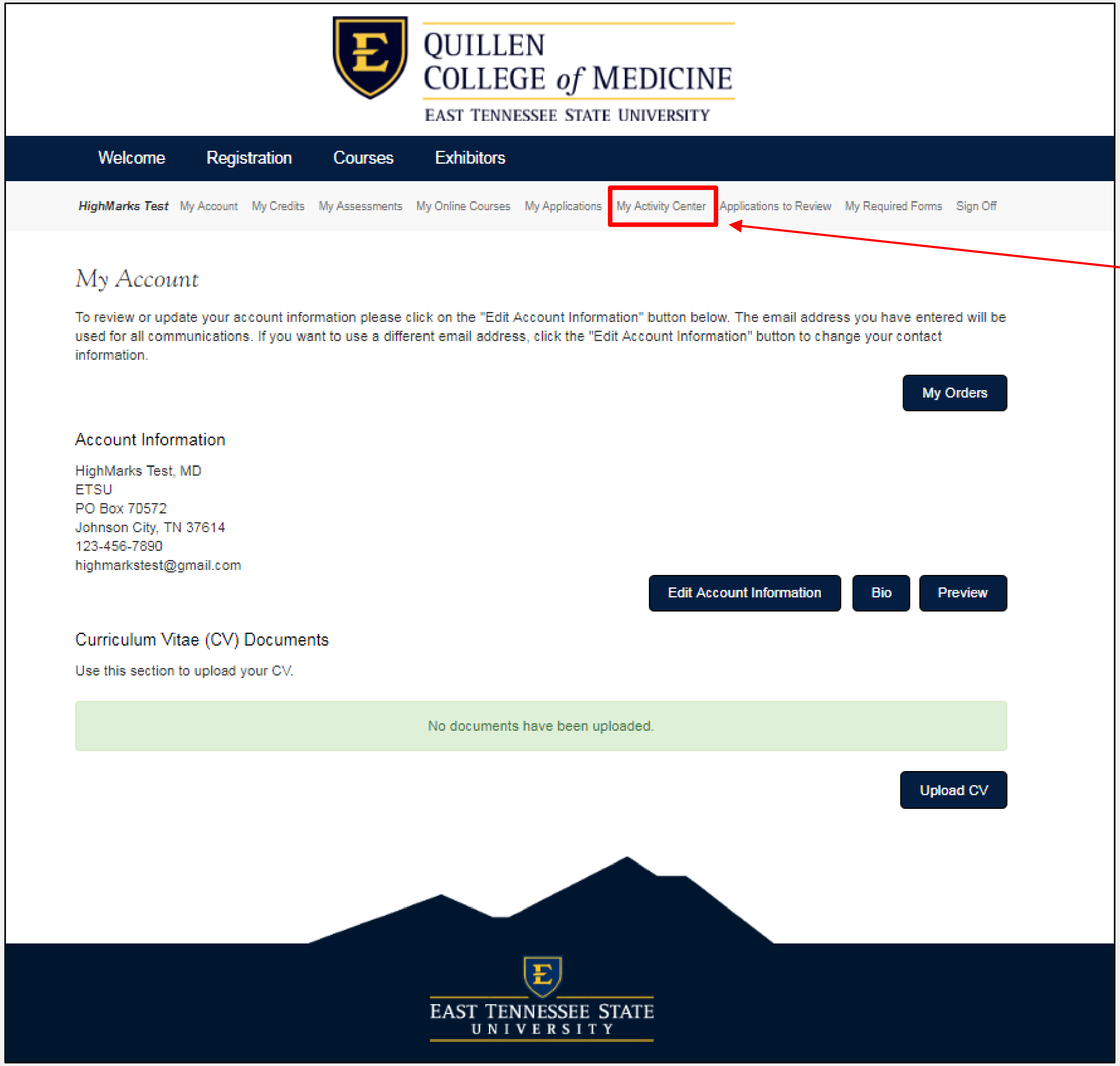
SESSION COORDINATOR ROLE

OFFICE *of* CONTINUING MEDICAL EDUCATION
Quillen College of Medicine
EAST TENNESSEE STATE UNIVERSITY

WE ARE EXCITED TO INTRODUCE YOU TO OUR NEW COORDINATOR PORTAL!

This new system and process will allow us to work more collaboratively together, have everything in one convenient place that you will be able to access and manage at all times, and streamline the management of your sessions when the occur.

- This presentation is designed to instruct you on the use of the coordinator portal and to detail the steps that need to occur prior to the session, on the day of the session, and following the session.
- The first few slides will introduce you to the coordinator portal; they show in detail how to access the portal and where everything is located.
- The remainder of the presentation is broken down by the timing of each responsibility and how to complete those specific tasks.



If you have been assigned the Coordinator role for an activity, click **'My Activity Center'** to be taken to the page to manage your sessions.

In the Activity Center you will see two options under each session:
Manage Sessions
and Reporting.

Click **'Manage Sessions'** to enter your activity. (Reporting is also an option under Manage Sessions)

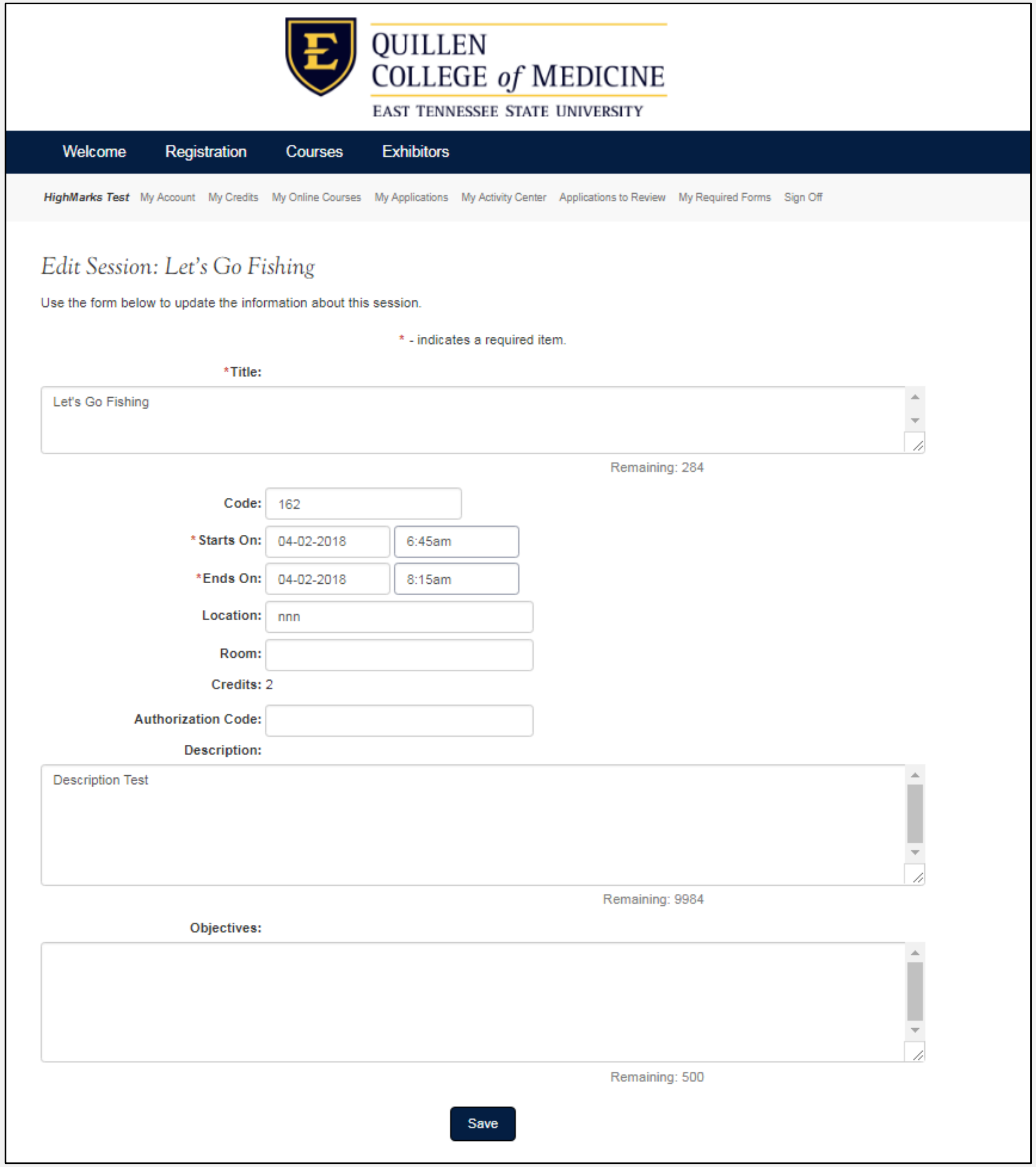
On the 'Manage Sessions' page you will see all of the sessions created for each scheduled date of your activity.

Here, you have the option to:

- Preview your session details
- Edit certain details of each session
- Manage roles
- Manage documents
- Manage attendance
- And view session reports

Under 'Edit Session', you can:

- Verify that all of the details of your session are correct.
- Add a specific room that this session will be held in.
- **Do <u>not</u> change the date or time of a session without contacting us first. Credit can be withheld if changed without prior approval.**


QUILLEN COLLEGE *of* MEDICINE
EAST TENNESSEE STATE UNIVERSITY

Welcome | Registration | Courses | Exhibitors

HighMarks Test My Account My Credits My Online Courses My Applications My Activity Center Applications to Review My Required Forms Sign Off

Edit Session: Let's Go Fishing

Use the form below to update the information about this session.

* - indicates a required item.

*Title: Let's Go Fishing
Remaining: 284

Code: 162
*Starts On: 04-02-2018 6:45am
*Ends On: 04-02-2018 8:15am
Location: nnn
Room:
Credits: 2
Authorization Code:
Description: Description Test
Remaining: 9984

Objectives:
Remaining: 500

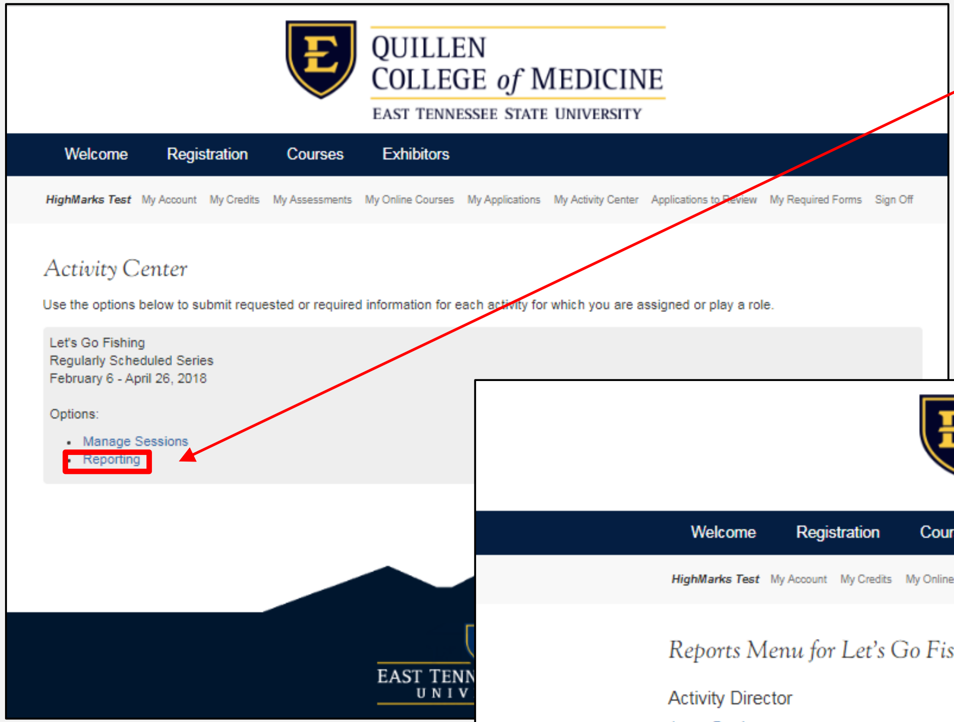
Save

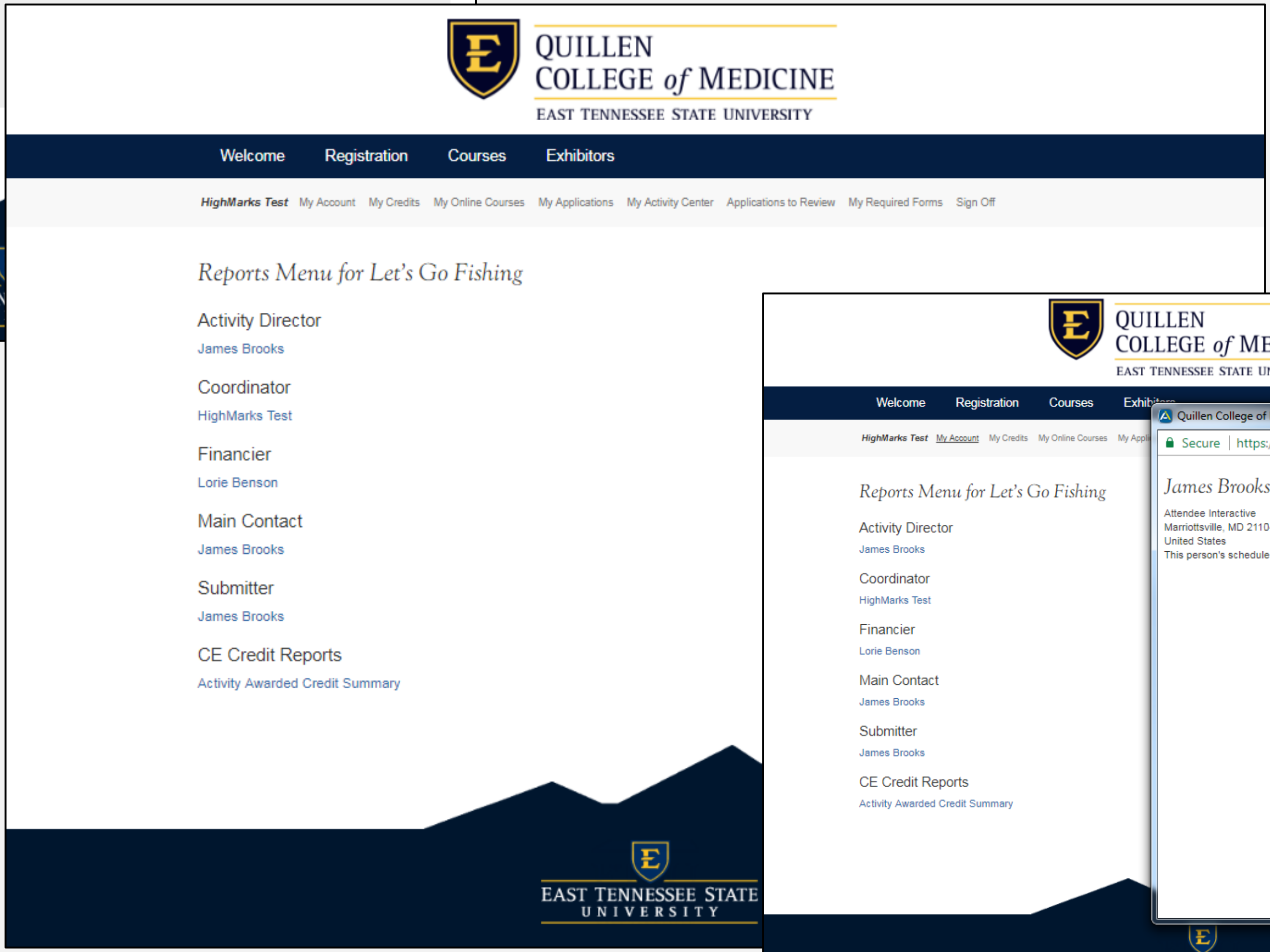
Clicking a name in the reports menu will show you each individual's disclosure of conflicts of interest information.

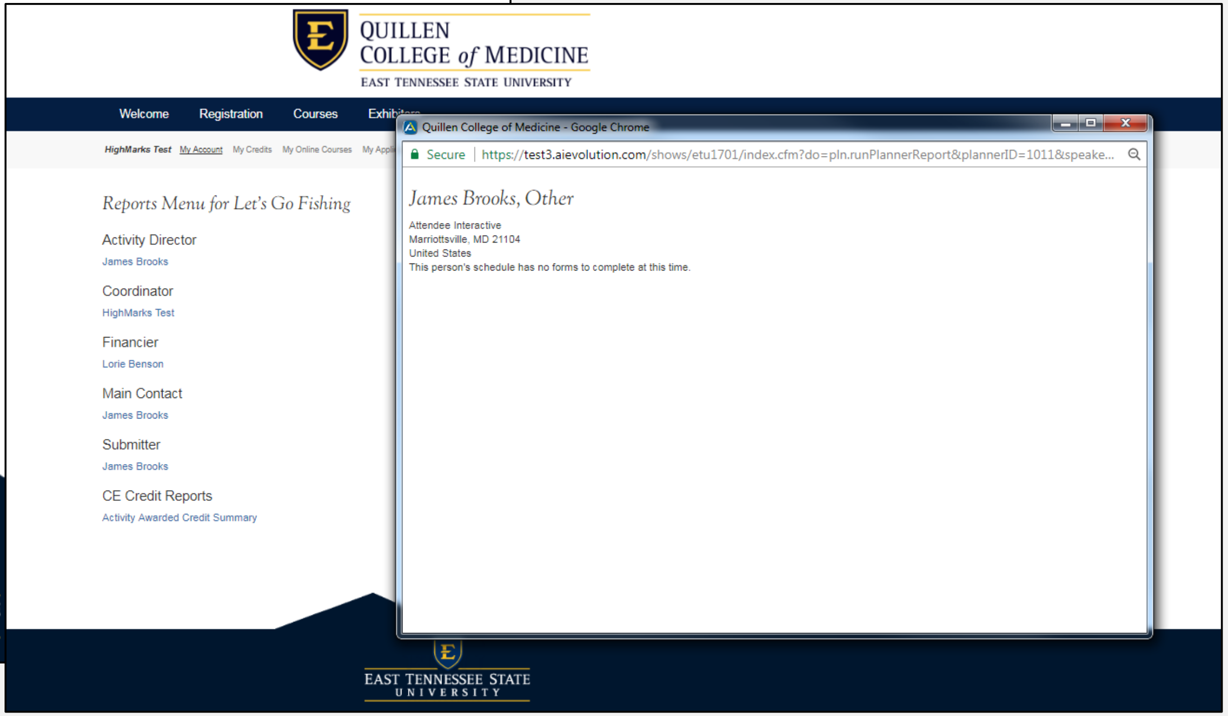
Under 'Reporting', available reports include:

- **Status report** shows you which required items your speakers have or have not completed.
- **View Claiming Instructions** includes the QR code attendees will use to sign in to the session and for credit claiming, along with additional instructions
- **Credit Report** will show who has claimed credit.
- **Session Evaluation** report will show a summary of completed evaluations.

The 'Reporting' page listed on the main 'Activity Center' page is <u>not</u> the same as the 'Reporting' option under 'Manage Sessions'





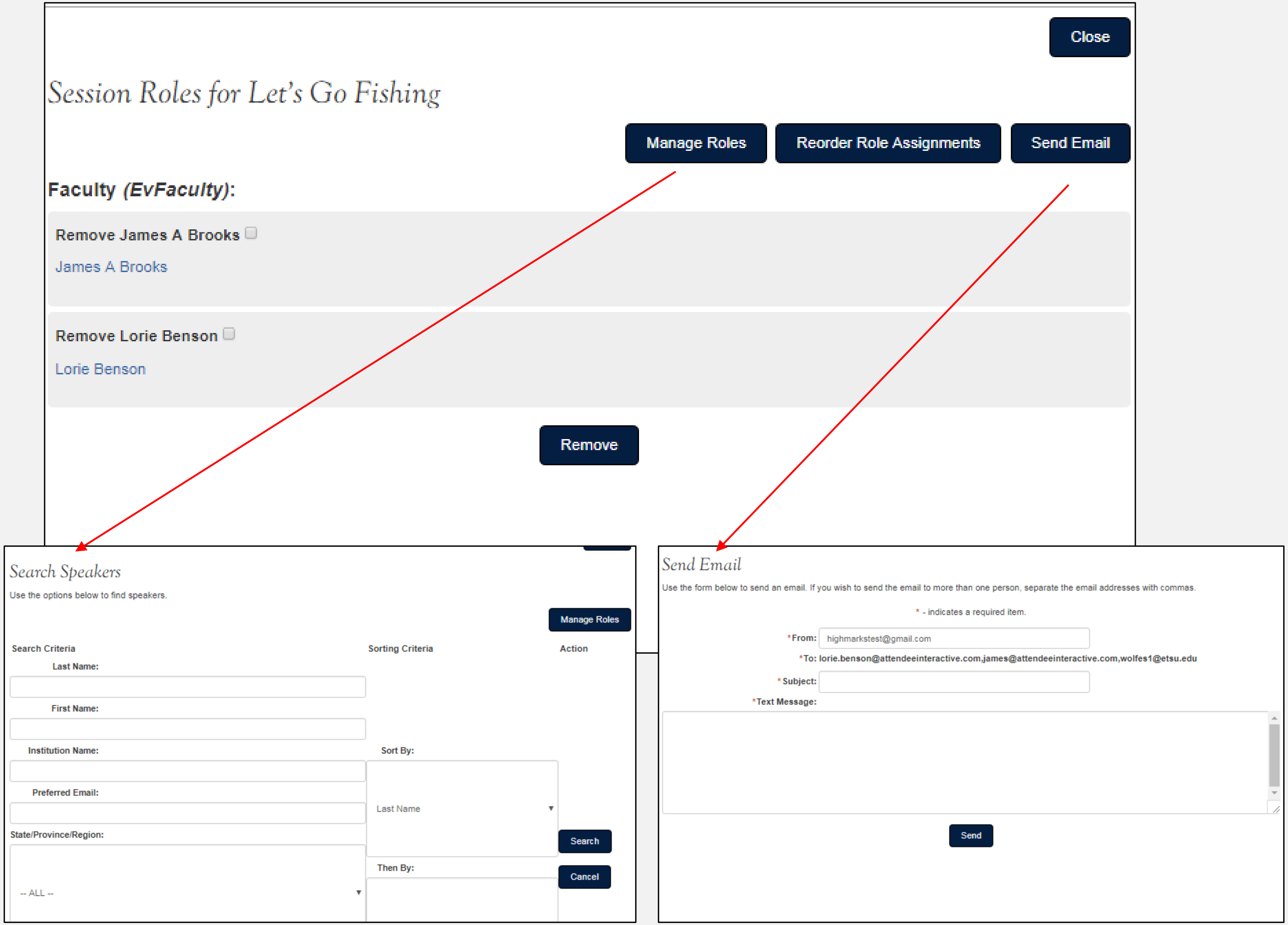


Here you will see a list of the people that were entered on the 'Leadership' tab in the application. Clicking on their name will show whether they have any outstanding forms to complete and give you their contact information.

TO BE DONE IN ADVANCE OF THE SESSION:

The following tasks need to be completed before the session occurs.

- Add the speaker to each session as soon as they have been identified, at least two weeks prior to the session.
  - They will not be automatically notified that they have been added to this role.
- Check the 'Manage Session' report to make sure all required documents have been completed and the speaker's presentation has been uploaded.
  - **Please ensure the presentation is available at least 3 business days prior to the session. This is necessary in case we need to send the presentation off for peer review.**
- Check presentations to make sure speakers have included a disclosure slide, even if they have nothing to disclose.
- Check speaker form to make sure speakers have included learning objectives and at least one question.
- Speakers will need to be instructed to upload their CV to their main profile page.



Under 'Manage Roles' you can :

- Add Speakers
  - Search by name on the 'Search Speakers' page. If they do not have a profile in the HighMarks system they will need to create one.
- Email all assigned speakers
  - Use template email provided to ensure all necessary information is communicated.

*Faculty is the same as speaker within the system.

My Sessions To Build for Let's Go Fishing

Use the options below to create and manage sessions for this activity.

162 - Let's Go Fishing

April 2, 2018
6:45 AM - 8:15 AM

Preview · Edit Session · Manage Roles · Manage Documents · Attendance · Reporting

Manage Documents for Let's Go Fishing

Upload Document

4 document(s) uploaded

Action	Document Title	Public	Approval Status
Edit · Preview DOC · Email Document	Document	No	Pending
Edit · Preview DOC · Email Document	Document	No	Pending
Edit · Preview PPTX · Email Document	Document	No	Pending
Edit · Preview PPTX · Email Document	Document	No	Pending

Disclosure information for each session will be found in 'Manage Documents', titled 'Disclosure'.

***The display of disclosure information is required by ACCME.**

Under 'Manage Documents' you can:

- Upload and document pertinent to the session.
- Preview any uploaded documents, such as speaker presentations.
  - **The latest, final approved version of the presentation will be located here.**

*Speakers will upload their presentation into the 'Speaker Room' when they are assigned to a session.

The **Event Status Report** lists all of the requirements for the assigned speaker(s) and the completion status of each requirement.

Event Status Report

Monday, Apr 2

162 - Let's Go Fishing

6:45 AM - 8:15 AM

Faculty

1. **James A Brooks Other**
   Attendee Interactive
   5601 Warwick Way
   Room 110
   Marriottsville United States 21104
   Phone Number: 4104800974
   Fax Number: 4104800974
   Preferred Email: james@attendeeinteractive.com
   Bio: ✕ Not Completed

   Forms

   Accountabilities *(Required)* : ✓ Completed
   Financial Disclosure *(Required)* : ✓ Completed

Forms		Document	
CME Activity Speaker Form *(Required)*	✕ Not Completed		✕ Missing Document

2. **Lorie Benson MD**
   AI
   123 Road
   Marriottsville United States 21104
   Phone Number: x
   Preferred Email: lorie.benson@attendeeinteractive.com
   Bio: ✕ Not Completed

   Forms

   Accountabilities *(Required)* : ✓ Completed
   Financial Disclosure *(Required)* : ✓ Completed

Forms		Document	
CME Activity Speaker Form *(Required)*	✕ Not Completed		✕ Missing Document

PLEASE REVIEW EACH PRESENTATION TO MAKE SURE DISCLOSURE INFORMATION IS INCLUDED. ONE OF THE FOLLOWING STATEMENTS SHOULD BE INCLUDED AT THE BEGINNING OF EVERY PRESENTATION:

- If there are no disclosures to report:
  - I and/or my spouse/partner have NO personal or professional financial relationships with commercial interests that could be perceived as a conflict of interest related to the content of this activity.
- If there is a disclosure to report:
  - I and/or my spouse/partner have the following personal or professional relationships with commercial interests that could be perceived as a conflict of interest related to the content of this activity:

Name of Organization	Nature of Financial Interest	Who has the Relationship (self/partner)
	Grant/research support	
	Consultant fees	
	Speaker's Bureau	
	Advisory Board	
	Major stock or shareholder	

TO BE DONE ON THE DAY OF THE SESSION

The following tasks will be required the day of the session to allow your attendees to check in upon arrival.

- Pull the ‘Credit Claiming’ report that contains the QR code and claiming instructions. Pull disclosure information to display during the session.
  - This can be printed and placed where the old sign in sheets were located and also displayed on the screen; attendees can scan the QR code in both formats.
- Have a laptop available for yourself or another coordinator to complete the backup check-in process for attendees who do not have a smart phone or who may have forgotten their phone.
- Pull up presentation in HighMarks to use during the session. This will ensure the most recent and final approved version is what is displayed on the screen.
- Print and hand out provided transcript instructions for attendees the first few sessions after March 5th.
- **The QR code and administrative check in process will be active <u>15 minutes</u> in advance of the session and will be automatically inactivated <u>30 minutes</u> after the session ends. If a check in somehow occurs outside of this timeframe it will be deleted. This allows us to make sure only those who actually attended the session can claim credit.**

The **View Claiming Instructions** report will pull up a document that can be printed out and displayed on the screen within the presentation.

Attendees will check in by scanning the QR code within this document. Each session has a specific code. Once scanned, if they have created their profile in HighMarks, they will be taken to a page to log in and mark themselves in attendance.

Attendees should be instructed to download a QR code reader prior to or as they arrive to the session.

*The backup process for those who do not have a smart phone or do not have their phone with them is for yourself or another coordinator check them in manually under the 'Attendance' option in 'Manage Sessions'.

temp_ClaimingInstructions_highmarkstest@gmail._20... 1 / 1

Claiming Instructions

Thanks you for attending Let's Go Fishing on 04/02/2018. Please follow the instructions below to claim credit for this session.

Claim Using QR Code

1. Scan the QR Code below:
2. Enter your contact information.
3. Confirm attendance and submit form.
4. Log into the ETSU claiming site to complete evaluations, if required.
5. Congratulations! You're done. Use the "View Transcript" or "View Certificate" link to print a record.

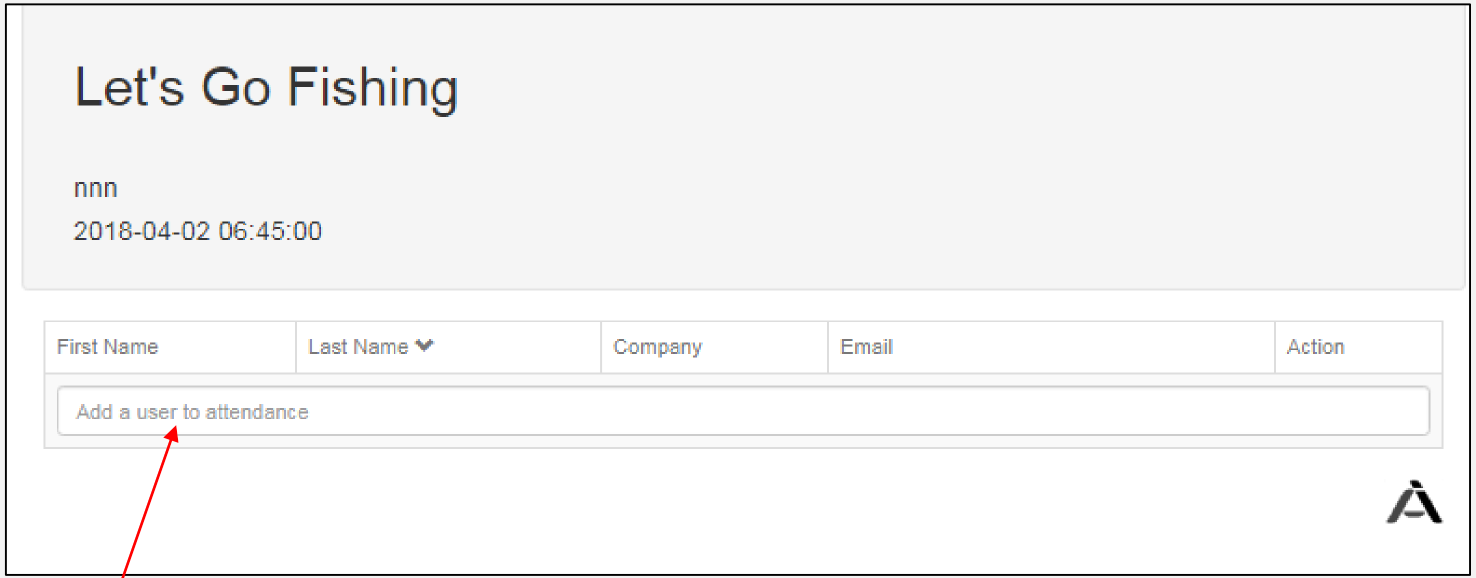
Claim Using Website

1. Using the browser of your choice, go to the ETSU claiming site.
2. Created a profile if you do not already have one, or use the forgot password wizard to retrieve you password if you have forgotten it.
3. Log into the cme claiming site.
4. Click the "My Credits" link.
5. Select the attended activity from the drop down list, and click the "List by Activity" button.
6. Click the "Claim" link next to the attended session.
7. Confirm and attest to attendeeing session.
8. Complete the session evaluation, if required.
9. Congratulations! You're done. Use the "View Transcript" or "View Certificate" link to print a record.

Under 'Attendance' you can:

- Check attendees in to a session as they arrive.

*A QR code will also be provided so that attendees can check themselves in upon arrival. If the attendee does not have a smart phone or does not have their phone with them this is the back up process in place to document their attendance.

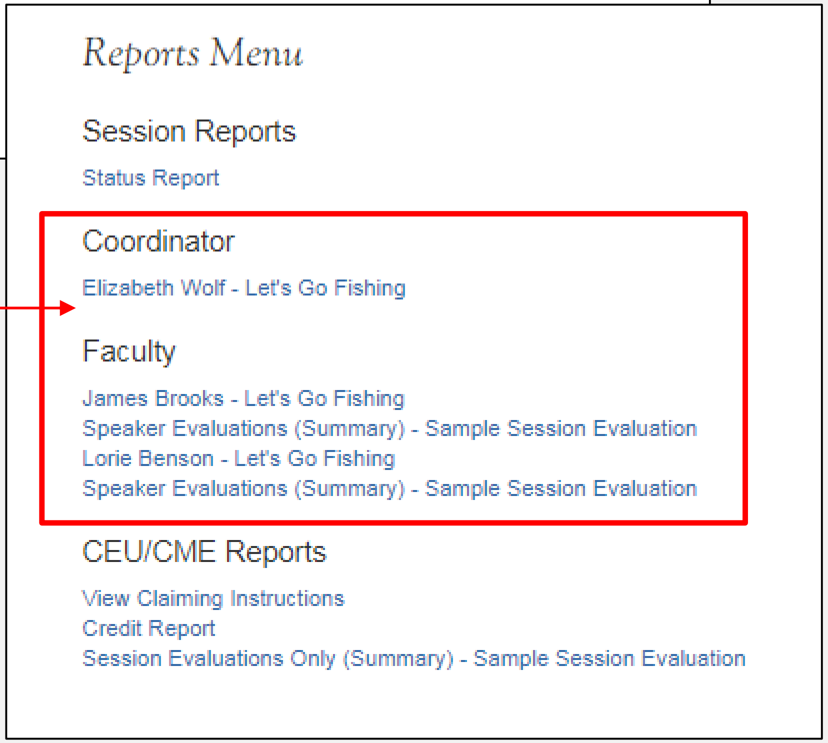


Search by typing in the first or last name. If the attendee has already created a profile in HighMarks they will show up in the search. If they do not show up in the search they will first need to create an account. Instructions will provided for you to walk them through that process.

***Please verify the email address to make sure it is not someone else with the same name.**

TO BE DONE AFTER THE SESSION OCCURS

- Access the ‘Evaluation Summary’ report.
  - This information will no longer be sent to you via email, it is available in the ‘Reporting’ section of your coordinator portal.
- Attendees will have 48 hours after the session ends to complete the evaluation and claim credit.
  - This is actual hours following the session, not business days.
  - **Requests for credit will be denied if not claimed within this time period.**



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