CloudCME™ RSS Dashboard for Activity Planners

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1. Go to activities in the Administration section.
2. Click on RSS Dashboard. The DETAILS column gives you all the information for the specific activity date.

3. Use the PENCIL icon to edit the activity. The activity editor comes where the name, location, date, time, etc. can be changed. NOTE: if the date of the activity is changed, remember to change it in the title as well. The blue arrows indicate areas that can be changed within the RSS Activity Editor for individual activity dates.

4. The DOCUMENT icon is the brochure/notice that should be displayed at each activity. This notice should include the QR code so participants can document their own attendance. NOTE: There are other ways for participants to document attendance and all options should be included on the notice so planners do not have to enter participant information for each activity.

5. When the document window opens, click on the <u>Download Microsoft Word Version</u> link to open the brochure/notice and add the QR Code for the specific activity date.

6. When the document opens in Microsoft Word, click on the Enable Editing button to add QR Code.

7. Return to the RSS Dashboard. Click on the Single Scan QR button to pull up the Activity QR code.

8. Be sure to check the name, date, and the activity codes on the QR pop-up to ensure that they match the brochure/notice that it is being added to so that participants do not document their participation on the incorrect date.

9. Once confirmed, right click on the image, return to the Microsoft Word document and paste the image in the location indicated on the document (as shown above). NOTE: You may have to adjust the size of the image to fit the location size. The document can either be distributed at the activity or displayed for participants to see/use during the activity.

***DO NOT PASS OUT** THE NOTICE/BROCHURE <u>PRIOR</u> TO THE ACTIVITY.
QR CODE ACCESS IS ONLY FOR PARTICIPANT USAGE.***

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# for Activity Planners

Child Status	Details	Topic	QR	Planners & COI Status	Faculty
APPROVED	**Series Name:** 2022 EDW Multidisciplinary Rectal Tumor Board (RSS) **Monday, November 28, 2022** *8:00 AM - 9:00 AM* **Location:** Edw Cancer Ctr - Conf Rm 2 **Department:** N/A **Parent ID:** 11330 **Child ID:** 11485 Case Conference	2022 EDW Multidisciplinary Rectal Tumor Board (RSS) - 11/28/2022	Single Scan QR	Manage Planners (1) ✓ Sandy Larva (Activity Meeting Coordinator) **Disclosure submitted:** *10/21/2022* **Disclosure:** Nothing to disclose - 10/21/2022	Manage Faculty (1) Lindsey Garnett, APN/LPN/NP **Disclosure submitted:** *11/14/2022* **Disclosure:** Nothing to disclose - 11/14/2022

/Admin/Events/Calendar.aspx?EventID=11330

10. The calendar icon opens the recurrence calendar for the activity. Similar to Microsoft Outlook, a change can be made for a single occurrence or changes can be made for the entire series.

11. Click on OPTIONS. Once open, the following changes can be made:
   - Activity Title
   - Start Date/Time; End Date/Time
   - Recurrence cycle
   - Recurrence day

12. Once changes are complete, click SAVE.

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13. The GARBAGE CAN icon is used to delete a single occurrence of an activity.

Add by entering name; click on role type; click check box for Request Disclosure. Then click on Add Planner/Faculty.

Delete

14. The MANAGE PLANNER(s)/FACULTY icon is used to add or delete planners/presenters to a single occurrence of an activity.

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15. Any disclosures listed on the RSS dashboard must be disclosed to learners PRIOR to the activity. Confirm that they are located on the notice before printing. Any missing information should be added to the notice.

through case review.
3. 3 Critically analyze the management of the selected Duly T improve outcomes.

Activity Code: 11598-11341

Disclosure: Speakers Bureau-Edwards Lifesciences - 11/10/2022
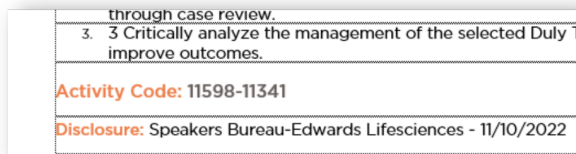
16. If an ACTIVITY PLANNER or PRESENTER/FACULTY does not have a disclosure, please request one using the envelope icon. The envelope icon initiates an email to the planner/faculty which you can use to request the individual complete an online disclosure. All disclosures must be up-to-date PRIOR to the activity taking place.

17. The orange icon next to a planner or presenter/faculty name indicates that a new or updated disclosure was submitted and needs to be reviewed. The CME Department automatically reviews all disclosures. HOWEVER, it is the planner(s) responsibility to ensure that any disclosures are revealed to the participants PRIOR to the activity.

18. The green icon in presentation column allows planner(s) to upload presentations for presenters/faculty prior to activities so participants can view, print, or take notes online or on their tablets or smartphones.

19. The Comments button allows planners to make notes about a particular activity.

20. Activity Planner(s) should ONLY use the RSS Dashboard to change activities, monitor disclosures, upload presentations, add/remove faculty and/or planner(s). The Activity Manager should not be used for any of these processes.

21. Activity Planner(s) should ENCOURAGE participants to utilize one of the 3 methods for documenting attendance.
   - Using the CloudCME™ app, scan the QR Code provided on the brochure/notice.
   - SMS Text (do not use iMessage) the Activity Code (located on the notice) to (630) 835-0554.
   - Use the Claim Credit button on the app DURING the activity or the Claim Credit button AFTER the activity ONLY on the computer. (The app claim credit will not work after an activity has already taken place.)

IF PLANNER(S) NEED TO RECORD ATTENDANCE FOR PARTICIPANTS, REFER TO THE NEW RECORD ATTENDANCE PLANNER(S) INSTRUCTIONS