RSS TRAINING
GUIDE FOR
ASSOCIATES

Session Workflow

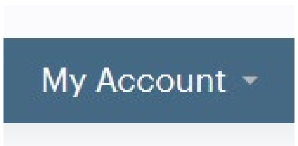
Contents

Section One: Accessing a Series

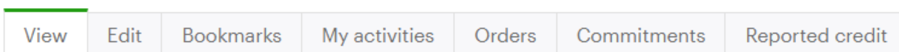
Step 1 – Go to: https://cce.geisinger.edu/

Step 2 – In the upper right, click login and enter your information. You may have to register if this is the first time on the new system.

Step 3 – Once logged in, click on **MY ACCOUNT**.

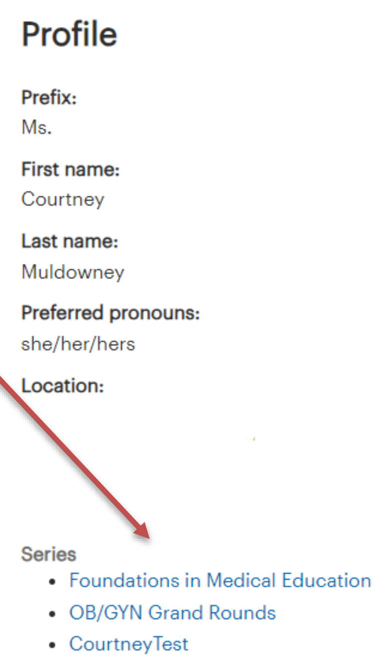


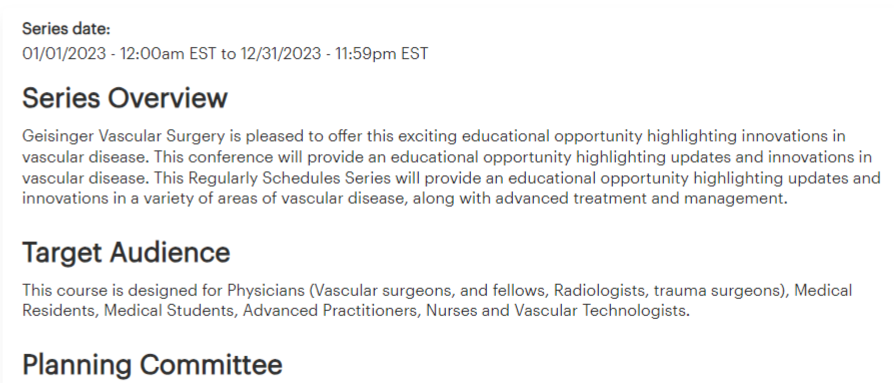
Step 4 – In your account, click on **VIEW**.



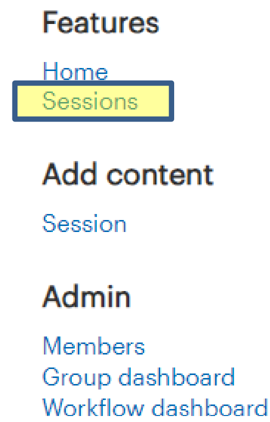
Step 5 – Scroll to the bottom of the page and choose the Series you are coordinating.

Step 6 – Once selected, below is the home page of your Series, review the information in the body. You will need this information when creating your session(s).





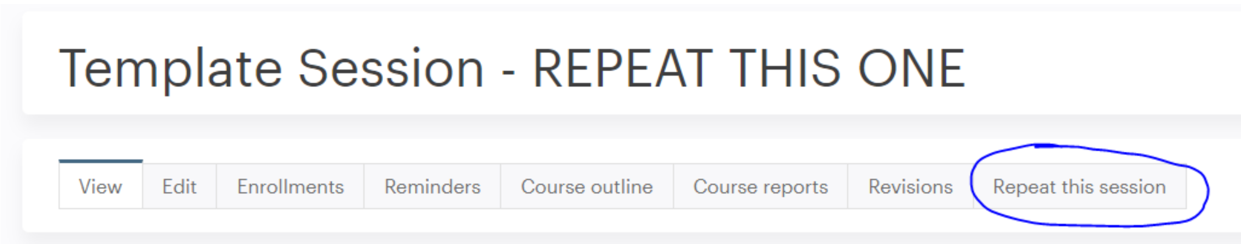
Section Two: Creating/Repeating Sessions



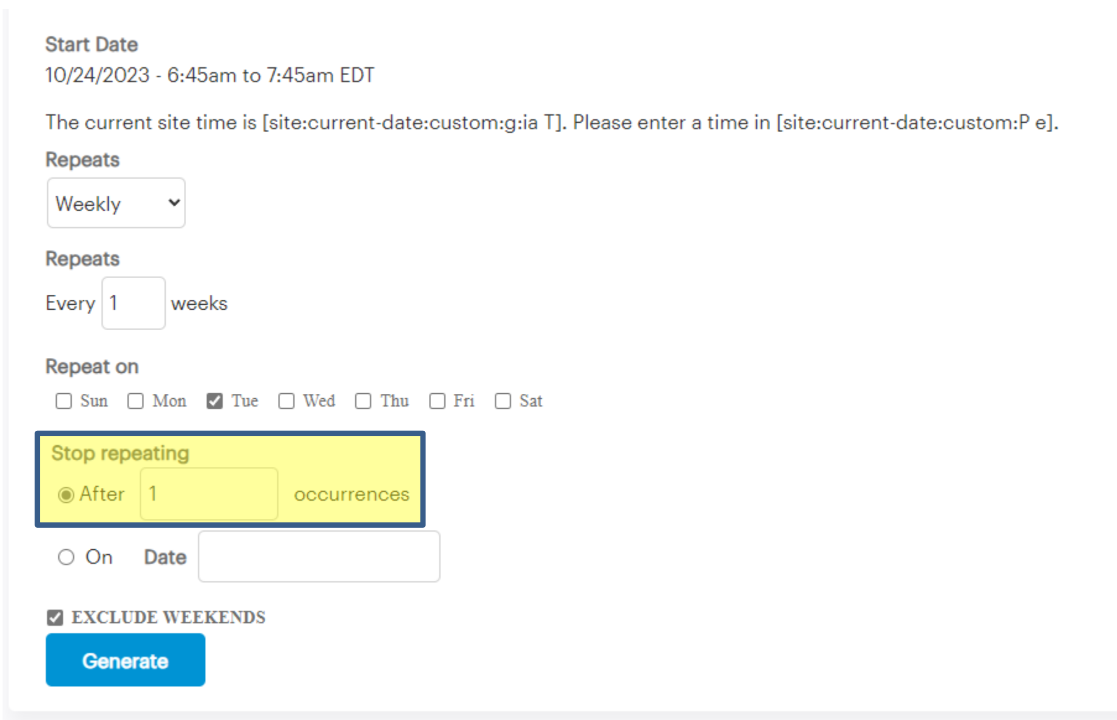
Step 1 – From the Series home page, on the left-hand side under **Features**, select **Sessions**. (Or scroll to the bottom of the Series home page). ***Please note if this is the first session for the year, please use the template session as a guide and enter your information.** For all future sessions, follow these instructions to repeat this first session:

Select a Session to Repeat. (previously held session)

Click to open the session and select the tab "**Repeat this session**":

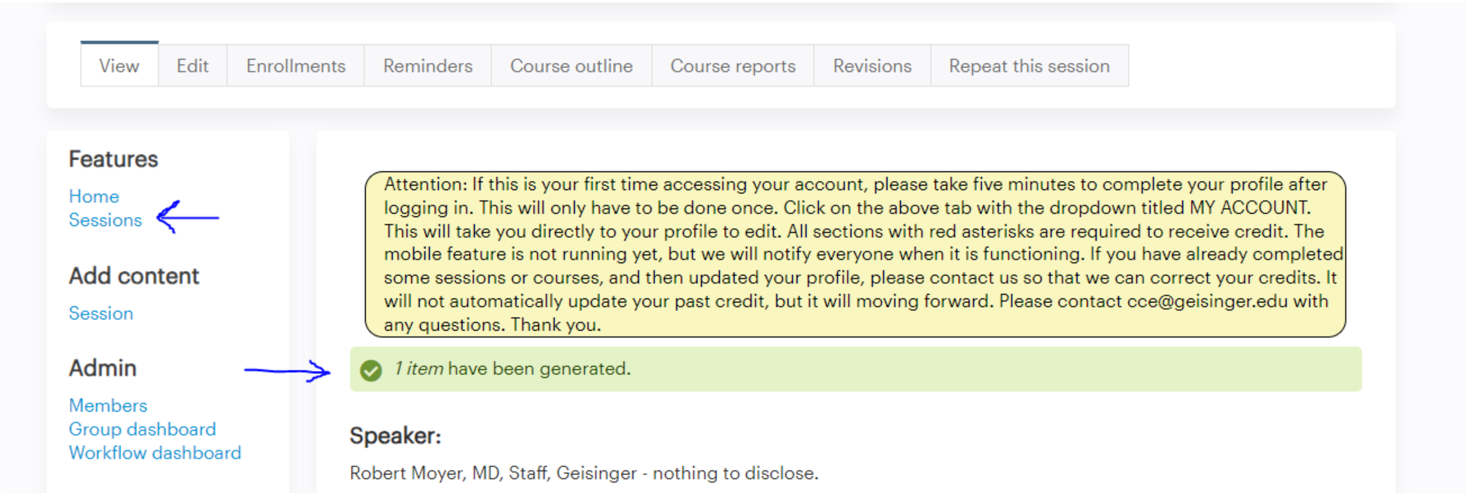


Set your repeating parameters. **It is recommended to Stop repeating after 1 occurrence** for your first Session.

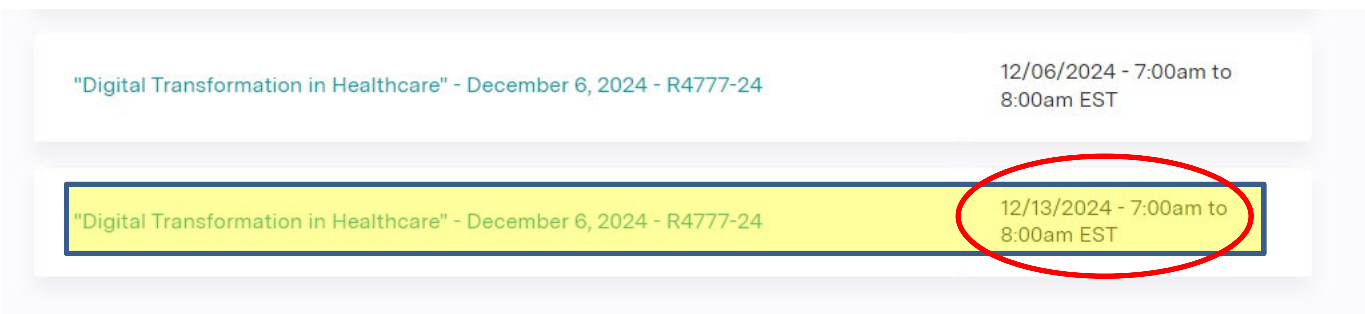


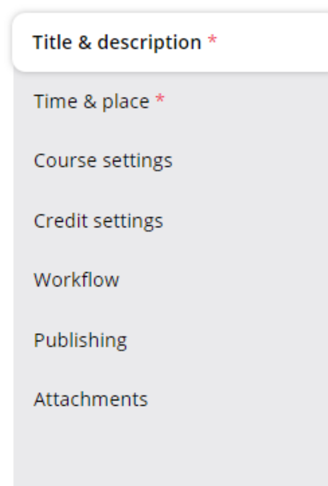
Click **Generate** and **Submit.**

*Your new Session is complete, but **do not** Edit from here. You must go back out to the Session tab (under Features) and find the newly created Session.



Select the new Session, the **title will be the same, but the date will be new**.





Step 2 –Edit your new Session. Following all tabs on the left side of your screen. Follow the directions below for each section listed.

Please note: Anything with a red * is required.

1. Click **Title & description*.**

- **Title* -** Include the title/topic of session. You can add the date to your session title if you would like. (After adding the new Title* it is highly recommended you **SAVE** the Session and continue editing.)
- **Body* -** Include the following items:

  1. Speaker/Moderator information. You will need to include the title, if individual is a staff member, resident, fellow, student, etc., location and disclosure information of these individuals.

  Example: John Smith, MD, Resident, Geisinger – has nothing to disclose.

  2. Learning objectives

  3. Disclosure of Relevant Financial Relationships with/without Commercial Interests

  4. Content Disclosure Statement

  5. Commercial Support Statement

- **Couse Instruction:** Leave blank.
- **Format:** Leave blank.
- **Category:** Leave blank

2. Click **Time & place*.**
   - **Live** must be checked.
   - **Session date*-** Enter when the Session will start and finish (i.e. this is the actual date/time of the activity)
   - **Location:** enter the location information
     - **Location name (required)** – If virtual, use "Virtual" as location.
     - **Street (not required)**
     - **City – list city where activity takes place (i.e.: Lewistown, Wilkes-Barre, etc.)**
     - **State/Providence**
     - **Postal Code (not required)**

   Please note: The information entered in Location name, City, and State will be reflected on the learner's certificate (if applicable).

3. Click **Course settings***
   - **Outline display:** Make sure that **"Course"** is selected.
   - **Enrollment type:** Make sure that **"Course"** is selected.
   - **Duration:** Leave as "0."
   - **External ID:** Leave blank.
   - **Show on transcript is the only box that should be checked.**

   ☐ Show on catalog

   ☐ Show on calendar

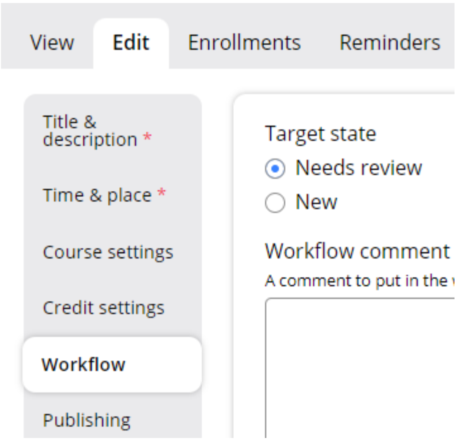
   ☑ Show on transcript

4. Click **Credit settings*** and choose **Course credit settings.**
   - **Your credit should be showing in this section. A CE staff member has already added this information for you. You can review to be sure the correct credit type is selected, <u>if any changes are needed, please notify the CE Office first before attempting to correct.</u>**
   - **Participation Credit** should ALWAYS be active.

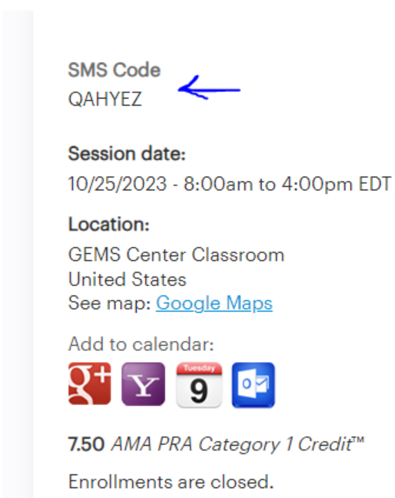
5. **Attachments** This section is **<u>no longer required</u>**. It can be used to upload any educational content you wish to be made available on the site. Example: PowerPoint slides, Journal Articles, etc. **<u>Please do not attach the old RSS Documentation Forms.</u>**

> ***Note:*** If you do not have all the information required to complete these tabs, you can "**SAVE**" your session and resume at a later time. It is recommended that you do not submit for review until all required documentation is complete.

6. Click **Workflow*** *This step initiates the review process. At this point, you should have completed all course information. Speakers/Moderators should have completed the disclosure/attestation form and any necessary slide reviews have been approved.*
7. Change the Target state from **"New"** to **"Needs review."**



8. In the Workflow comment box, include the date of the session. (You can include any additional information you would like your review team to see).
9. Click "**SAVE**". Your Session is now created and saved. This will initiate the approval process, sending an email to CCE, letting us know the submission needs to be reviewed.
   - Once the Session is approved, you will receive an email notification linking you to your Session. When on the home page of the Session, you will now see an **SMS Code** that can be shared with the learners. This code will be used for attendance purposes.



SMS codes are available to learners to register attendance for 72 hours. If your learners need more time to claim attendance, please let Continuing Education know.

Note: Your Session must be Approved PRIOR to EACH Session. You will not be able to award credit to learners without Approval. All Sessions and documentation related to the session must be submitted via Workflow at least **five business days prior** to the Session date.

Section Three: Evaluation Summaries

All M&M and Tumor Board activities must send evaluations to cce@geisinger.edu within 7-14 days of activity occurrence. If evaluations are not submitted, credit will be removed.

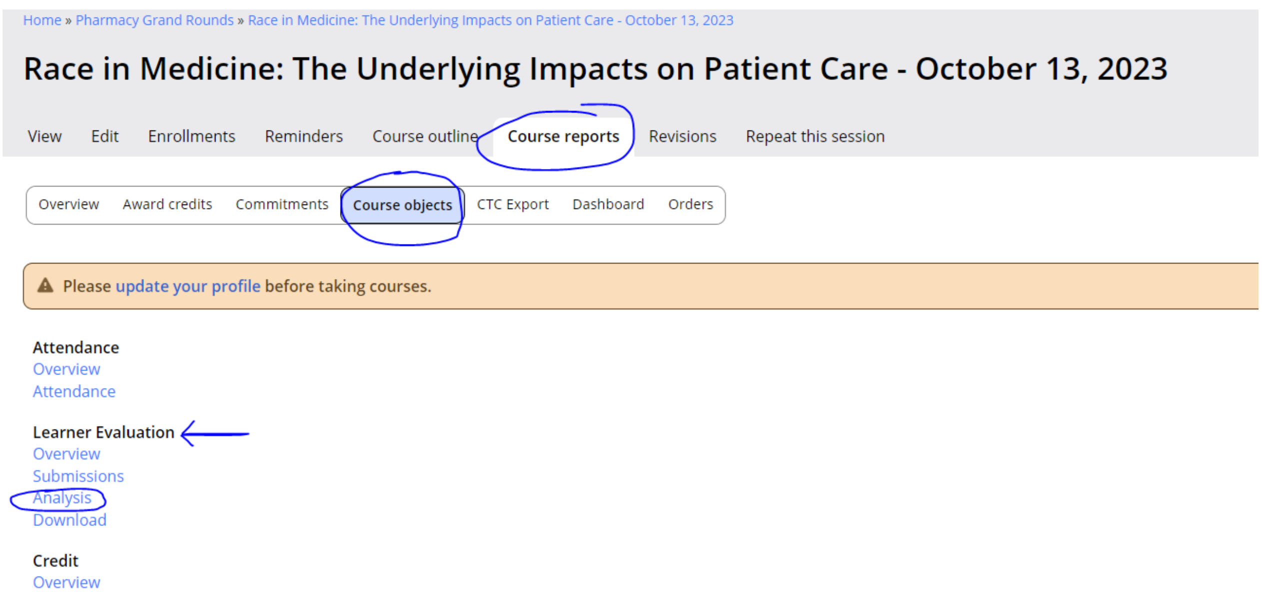
For all other activities: if you are searching for learner feedback from your Session, follow the instructions below to access this data.

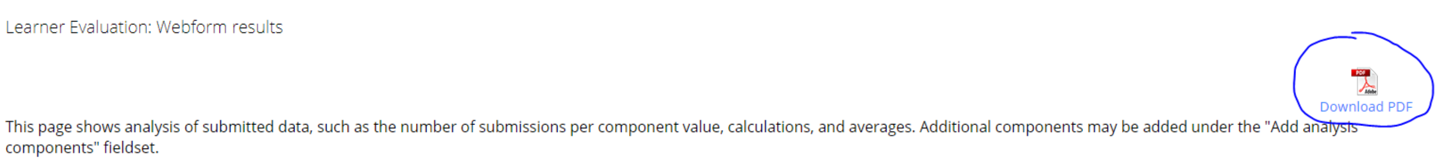
Step 1 – Enter the Session you wish to **pull Evaluation results from.**

Step 2 – Click on the **Course reports** tab

Step 3 – Click **Course objects** tab

Step 4 – Under **Learner Evaluation** click on **Analysis**, from here you can review results and/or download a PDF version of the results.





Section Four: Common Issues

- **To delete a session or if you accidently overwrote a session (you can tell you overwrote if the previous one is now gone, and your current one has enrollments):**
    - **PLEASE CONTACT CCE at cce@geisinger.edu immediately**
- **If your session is canceled, please notify us as well.**

Appendix: Descriptions of Tabs and Statements

View – This is like a home screen; it will allow you to see everything within the Session.

Edit – This takes you back inside the Session and allows you to edit it.

Enrollments – This will provide you with a list of learners who have pre-enrolled in the course (if applicable). You are able to add or remove learners in this tab.

Course outline – This shows you the course objects/requirements of the Session. Every Session will need attendance, learner evaluation and credit. (Please do not edit this tab)

**M&M and Tumor Board Sessions will not have learner evaluations.*

Course reports – This allows you to see how learners have progressed through the Session. You will see status on their completion of required course objects, as well as the credit hours and type of credit they have been issued.

Please reach out to CCE with questions about learners in this tab.

Revisions – This shows who and when each Session was edited.

Repeat this session – This allows you to copy your Session to create a new occurrence. You will need to re-name it (see Section Two).

Session Statements:

Content Disclosure Statement – This presentation and/or content is HIPAA compliant.

Disclosure of Relevant Financial Relationships with/without Commercial Interests – The Planning Committee consisting of <John Smith, MD and Jane Doe, MD> have no identified disclosures.

- OR -

If any members of the Planning Committee or educational team have listed disclosures, please include a description of these disclosures in a separate statement.

Disclosure of Relevant Financial Relationships with Commercial Interests – Planning Committee member John Smith, MD has disclosed the following relationship: Consultant, Pfizer.
Disclosure of Relevant Financial Relationships without Commercial Interests – Planning Committee member Jane Doe, MD has nothing to disclose.

**If a member of the Planning Committee has a listed disclosure, the course content must be reviewed by the CE Committee / Leadership team in advance of the educational session. There is additional verbiage that must be included in your documentation in this scenario.*

Commercial Support – If you have received a grant or in-kind contribution for your Series or any Session, please reach out to CE to inform us. This must be documented on the Series or Session homepage. If your department has not received commercial support for your Series, you just put “None”, this should be auto-populated as a CE staff member will include this for you.