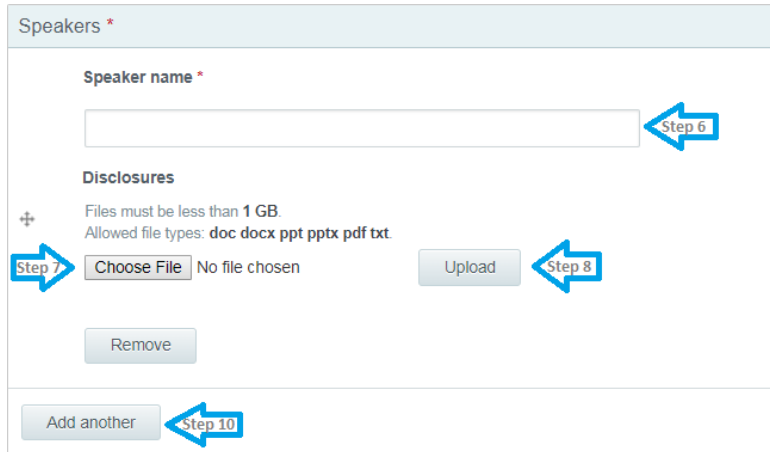
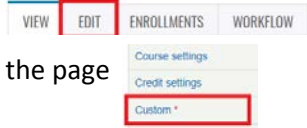


EthosCE – Workflows for In-Hospital Series Coordinators

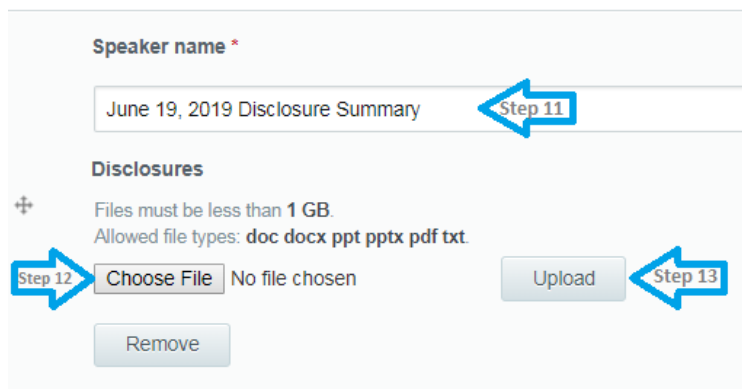
Updating Sessions & Requesting Review/Approval

1. Follow series link
2. Log-in
3. Go to session you are updating
4. Click 'Edit' on bar on top of page
5. Click 'Custom' on the left side of the page
6. Add Speaker Name
7. Click 'Choose File' to upload speaker disclosure form
8. Click 'Upload'
9. Repeat steps 6 – 8 for all speakers for this session
10. Click 'Add Another'



The image shows a form titled 'Speakers *'. It has a 'Speaker name *' field with an arrow pointing to it labeled 'Step 6'. Below that is a 'Disclosures' section with a plus icon, text 'Files must be less than 1 GB. Allowed file types: doc docx ppt pptx pdf txt.', and a 'Choose File' button with an arrow pointing to it labeled 'Step 7'. To the right of 'Choose File' is an 'Upload' button with an arrow pointing to it labeled 'Step 8'. Below the 'Choose File' button is a 'Remove' button. At the bottom of the form is an 'Add another' button with an arrow pointing to it labeled 'Step 10'.

11. Speaker Name for the additional attachment will be: *[DATE] Disclosure Summary*
12. Click 'Choose File' to upload the disclosure summary created for this session
13. Click 'Upload'



The image shows the same 'Speakers *' form. The 'Speaker name *' field now contains the text 'June 19, 2019 Disclosure Summary' with an arrow pointing to it labeled 'Step 11'. The 'Choose File' button has an arrow pointing to it labeled 'Step 12', and the 'Upload' button has an arrow pointing to it labeled 'Step 13'.

14. Click 'Save' at bottom of page
15. You will be brought back to the session's page

- 16. Click “Workflow” on bar at top of page
- 17. Check-off ‘Ready for review’
- 18. Click ‘Update workflow’

VIEW EDIT ENROLLMENTS **WORKFLOW** COURSE OUTLINE

Change Custom session state

- Ready for review Step 17
- In review
- Feedback
- Approved
- Rejected

Workflow comment
A comment to put in the workflow log.

Update workflow Step 18

An email will be sent to Emily Welch to review the information you have uploaded. Once the session has been approved, you will receive an email and the SMS code for attendance will become available. If revisions are needed for the uploaded information, you will receive an email prompting you to make the appropriate edits.

(Please see page 3 for additional information regarding the new SMS attendance process)

Attendance Information

1. SMS Process for Attendees

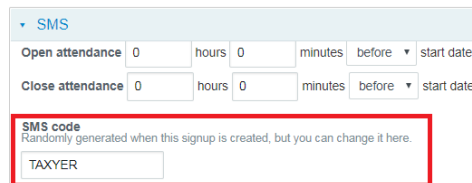
- Attendees will text the session code, provided by department onsite, to this number **(857) 214 – 2277**.
- They will then receive a response letting them know that their attendance has been recorded but they will need to log into the series website to complete the evaluation and claim their credit(s) for the session.
 - If they do not have an account with our new site yet, they will receive a message stating their attendance has been recorded but they need to create an account in order to complete the evaluation and claim their credit(s).

NOTE: evaluations will only remain **open for two weeks** after a session takes place. After this two-week period, evaluations will not be re-opened for completion.

2. SMS Attendance Process for Coordinators Onsite

- With this new feature, coordinators will no longer need to track attendance at each session.
- Once the session is approved online, the SMS code will be generated: *this code should be posted onsite at the session, with the phone number (indicated above) and instructions on how to use this feature.*

- Navigate to the session that has just been approved
- Click 'Enrollments' on bar at top of page
- Then click 'Settings' in green area at top of page
- The SMS Code is located below the SMS section



VIEW EDIT ENROLLMENTS FACULTY WORKFLOW

View Edit Enrollments Faculty Workflow Course outline
Administer Search and enroll Waitlist Settings Import Import

• SMS

Open attendance 0 hours 0 minutes before start date

Close attendance 0 hours 0 minutes before start date

SMS code
Randomly generated when this signup is created, but you can change it here.

TAXYER

A different SMS code will be automatically generated for each session.

If you would like to edit the SMS code, edit the text currently in the SMS code box and click 'save configuration' at the bottom of the page

- If an attendee either does not have their phone on them, or does not want to use the SMS feature for attendance, they will need to be manually enrolled (added) to the session. Manual attendance should be the secondary method of attendance....

3. Manual Attendance Process for Coordinators Onsite

- When someone is unable/doesn't want to record their attendance via SMS, the coordinator will need to collect their information on a spreadsheet to be uploaded to the session for this person's attendance to be recorded
- NOTE:** please make sure the attendee is providing you with the same email address they use to access our site; if these emails addresses are different, the attendee will not be able to access the session.
- The website has a template spreadsheet for manual upload:

- Navigate to session
- Click 'Enrollments' on bar at top of page



- Then click 'Import' in green area at top of page
- Under the *Import* section, click 'Download a template'
- Open the downloaded template and input the email addresses of those who manually signed-in onsite into column C (external email) – this is the only section that needs to be filled in – save the spreadsheet in your files
- Under the import section, on the same page, click 'Choose file' and find the spreadsheet you created. Once the spreadsheet is uploaded, click 'Import' at the bottom of the page
- Once successfully imported, the attendee will receive an email confirmation for this session. They will then need to log into the site to complete the evaluation and claim their credit(s)

