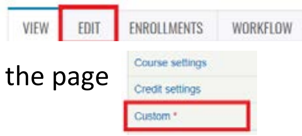
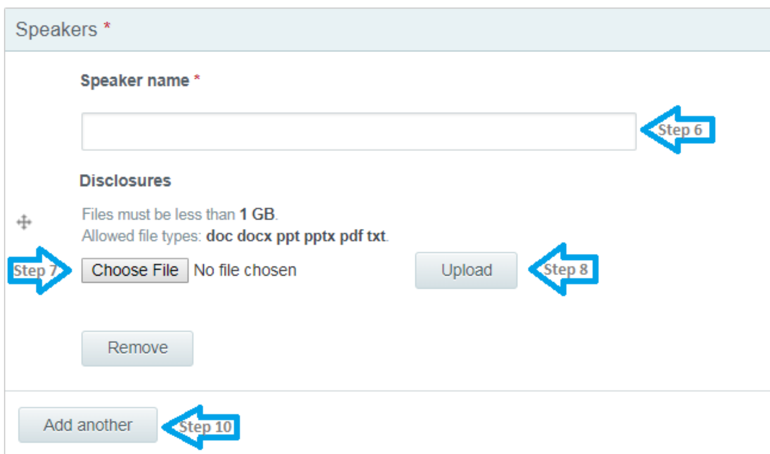
EthosCE – Workflows for In-Hospital Series Coordinators

Updating Sessions & Requesting Review/Approval

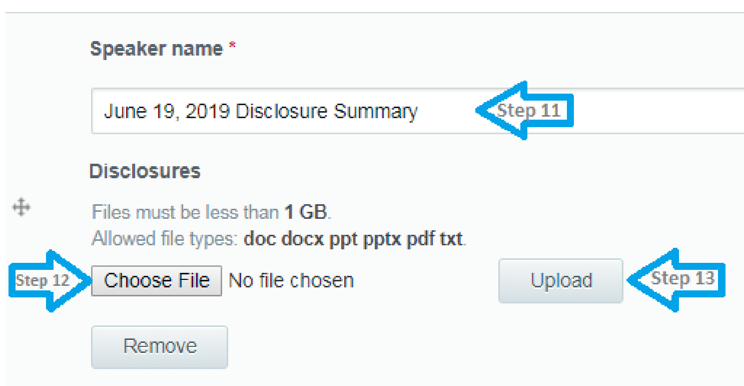
1. Follow series link
2. Log-in
3. Go to session you are updating
4. Click 'Edit' on bar on top of page
5. Click 'Custom' on the left side of the page
6. Add Speaker Name



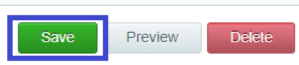
7. Click 'Choose File' to upload speaker disclosure form
8. Click 'Upload'
9. *Repeat steps 6 – 8 for all speakers for this session*
10. Click 'Add Another'



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'

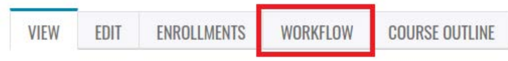


14. Click 'Save' at bottom of page

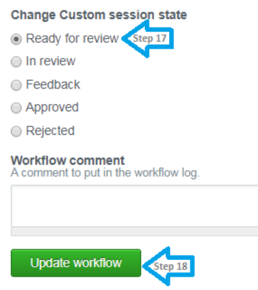


15. You will be brought back to the session's page

16. Click “Workflow” on bar at top of page



17. Check-off ‘Ready for review’
18. Click ‘Update workflow’



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)

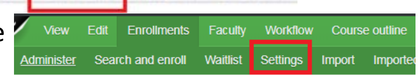
Attendance Information

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).

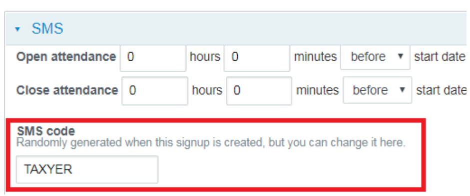
NOTE: evaluations will only remain **open for two weeks** after a session takes place. After this two-week period, evaluations will not be re-opened for completion.

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

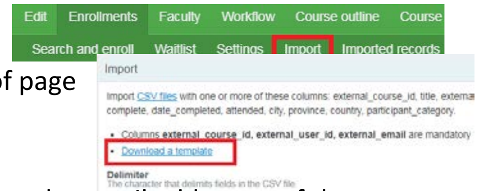


A different SMS code will be automatically generated for each session.

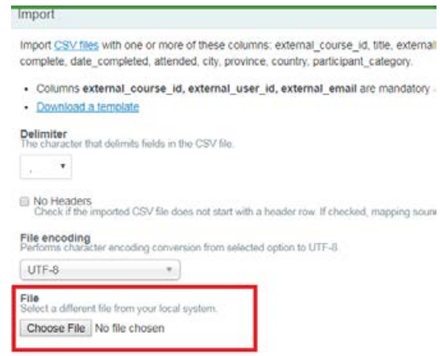
If you would like to edit the SMS code, edit the text currently in the SMS code box and click 'save configuration' at the bottom of the page

   - 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)