# Adding a Planner or Presenter to a One-time - Annual Event or Course

You will need to enter your planners and presenters into the portal before they can complete a disclosure form. Instead of individual JotForms, there will be one giant list of all the people who have been applied as a planner or presenter to any CPD activity at OHSU.

You will no longer email a link to planners or presenters – the portal will do this automatically once you have entered them. The administrative contact for the activity will be cc'd on this email.

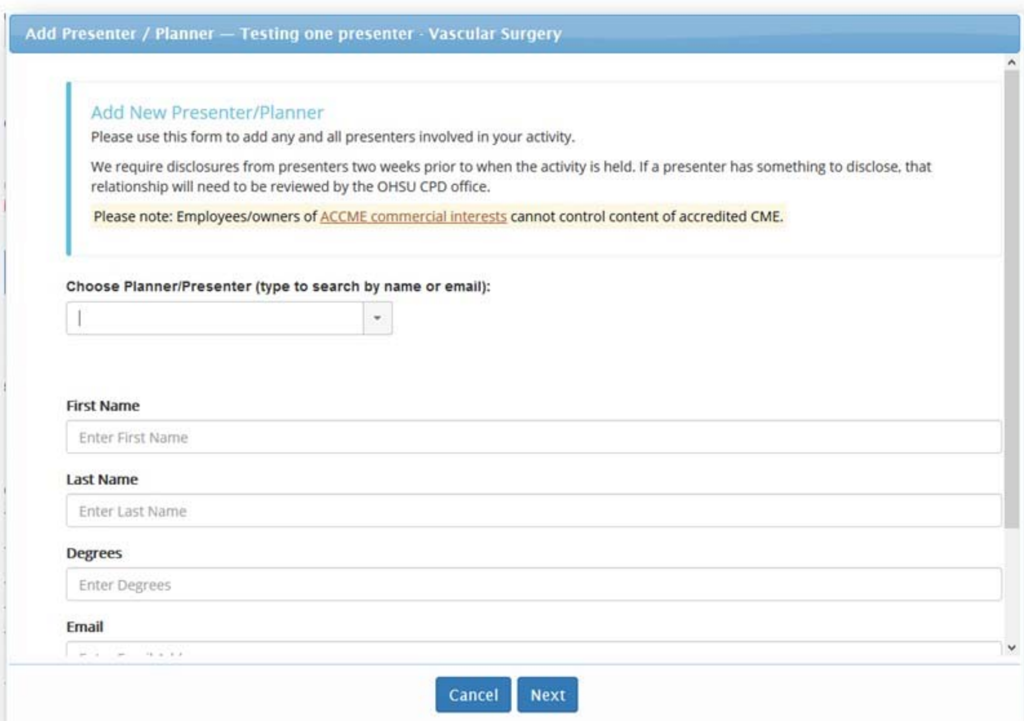
Planners and presenters will not be separated into separate widgets, but will live in one widget on the planner and presenter tab.

When a planner or presenter clicks on the link to complete a disclosure, their name, degree, and any previously reported disclosures will be pre-populated on the form.

When they have verified that the information is correct, or completed a new disclosure, the information they provide will be uploaded to the portal automatically. This will happen within approximately two hours of them completing the form.  You will no longer need to download and excel, and then upload it to the portal.

One of the really big process change here, is that you need to enter someone into the portal in order for them to receive the email to complete a disclosure. However, once a person has been entered into the portal, in any department, they will be on a dropdown list. If they have a disclosure on file (disclosures are still good for 12 months) that disclosure will pull into your activity.

To add a speaker, click on the plus sign in the corner of the planner and presenter widget.  This will bring up the following pop-up. Once you start typing a name or an email address the dropdown will give you choices, if the person you want to add is not there, press the tab key and you will be able to enter their name in the fields below.



Once you click next, you will return to the main view of the planner and presenter widget.


If they have a current disclosures on file and have nothing to disclose, the disclosure status will show "Active" and the disclosure will show "Nothing to disclose".

If they have been added to the activity and don't have a disclosure on file, even an expired one, an email will be generated to the person to complete. The administrative contact for the activity will be cc'd on this email.

If they have been added to the activity and have an expired disclosure on file, an email will be generated for them to complete a new disclosure form. If they previously had disclosures, this information will be pre-filled for them to accept as still true, or adjust.

If they have something to disclose and a current disclosure on file, the disclosure status will say "Pending" and the disclosure column will say "Disclosures reported" – Whenever someone with a disclosure is added to an activity – the orange questions mark buttons for the reviewer form will appear based on their role: planner, presenter, or both. This will also generate an email to the administrative contact to forward to the program chair with instructions on completing the reviewer form. Once the reviewer form is completed, CPD will upload the reviewer form. (See reviewer form process for courses document)