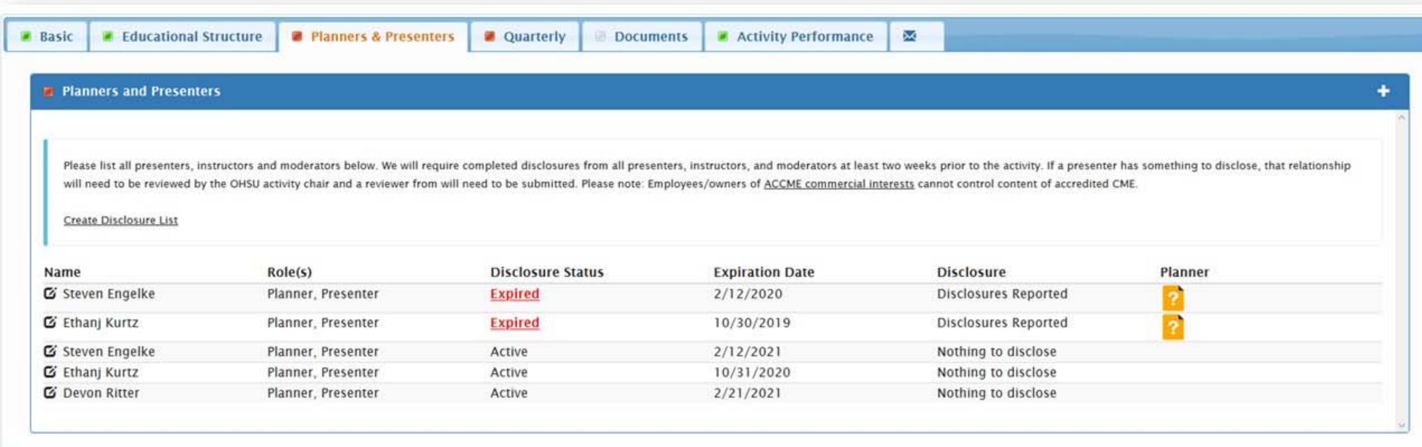
Adding a Planner or Presenter to a Regularly Scheduled Series – Grand Round – M&M – or Tumor Board

You will need to enter your planners and presenters into the portal before they can complete a disclosure form. The good news is that this will make the process for collecting disclosures and creating the disclosure list much easier. 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:

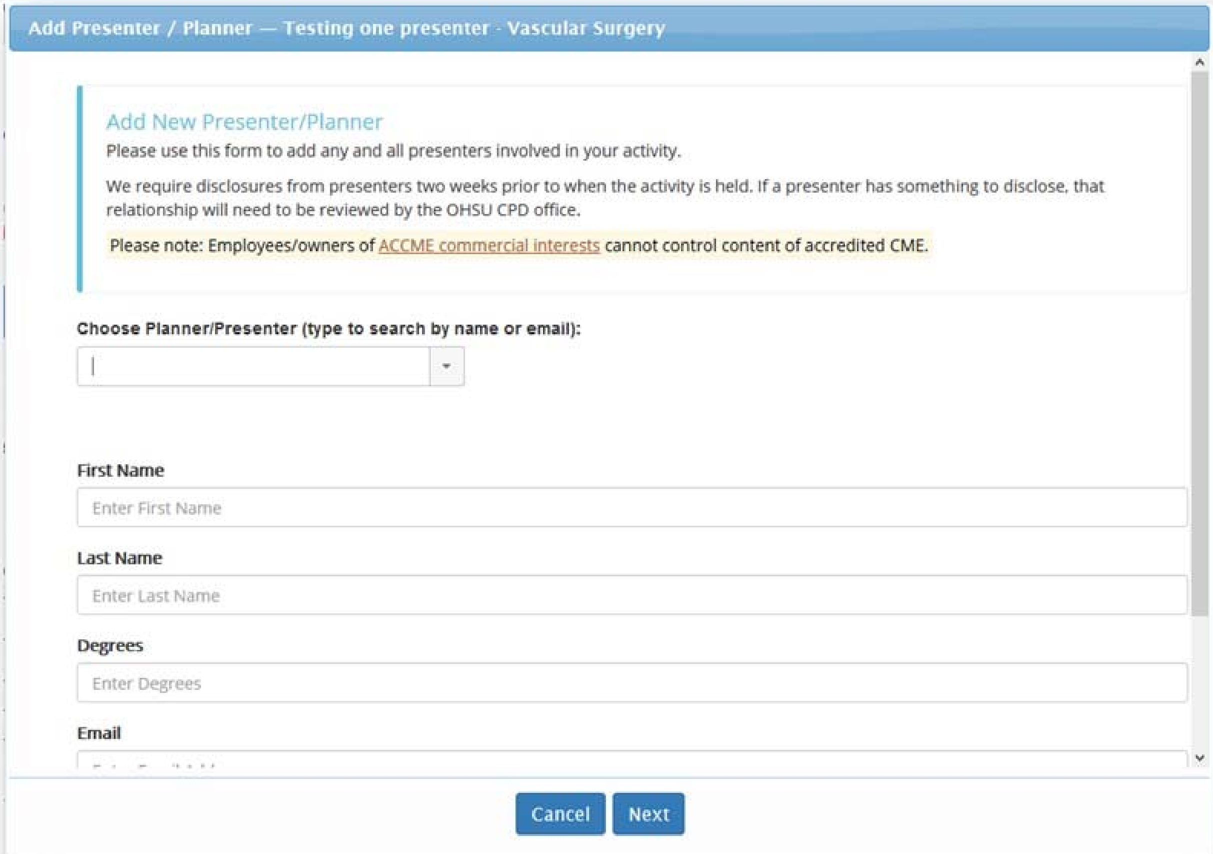


When a planner or presenter clicks on the link to complete a disclosure, their name, degree, and any previously reported disclosures will be pre-populated on the form.

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. **You won't be able to back fill at the end of a quarter.** 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.



When you add your speakers to a session on the quarterly tab if they have disclosures on file and have nothing to disclose, there will be a green jelly bean next to their name. If they have something to disclose, the jelly bean will be yellow and you will receive an email to forward to your program chair with instructions on completing the reviewer form. Once the reviewer form is completed, CPD will upload the reviewer form.

It is very important to add your speakers to the weekly/session widgets on the quarterly tab at least 24 hours in advance of your activity as the Jellybean status will let you know if the person can speak. Also, if you add someone to a weekly/session widget and their disclosure is expired, the will receive an email to complete a new disclosure. The administrative contact for the activity will be cc'd on this email.

To view someone's disclosure you must now click on the "create disclosure list" link. This link will appear in each weekly/session widget when you have associated you speakers with that date.

See the Creating a disclosure to audience for RSS for that process

See reviewer form document for the process for people with items to disclose.