

New Innovations (RMS) Conferences Module-Manage Conferences Training



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Managing Conferences

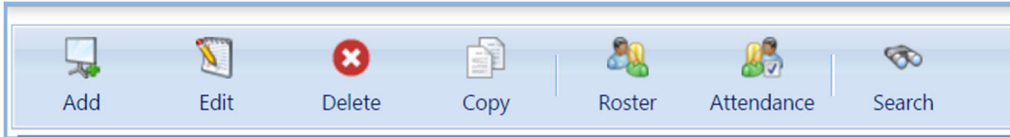
For more information about this topic go to [Help>Tutorial Videos>Conferences- \[11.3\] Conferences-Take Attendance and Manage Existing](#)

This page is used to add new conferences and view and edit existing conferences. You can see at a glance which conferences have a speaker (people icon), have attendance taken (blue check), and have a survey attached (yellow paper icon).

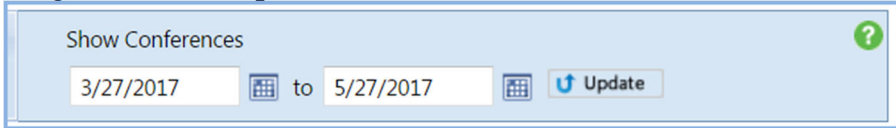
Name	Date/Time	Category	Speakers	Attn	Surveys
Morbidity and Mortality	4/1/2017 10:00 AM	M & M			
Noon Conference	4/1/2017 12:00 PM	Noon Conference			
Journal Club	4/2/2017 10:00 AM	Journal Club			
Simulation Lab	4/3/2017 8:00 AM	Simulation Lab			
Morbidity and Mortality	4/8/2017 10:00 AM	M & M			
Noon Conference	4/8/2017 12:00 PM	Noon Conference			
Journal Club	4/9/2017 10:00 AM	Journal Club			
Simulation Lab	4/10/2017 8:00 AM	Simulation Lab			
Grand Rounds	4/14/2017 10:30 AM	Grand Rounds			
Morbidity and Mortality	4/15/2017 10:00 AM	M & M			
Noon Conference	4/15/2017 12:00 PM	Noon Conference			

Most actions can be accessed from the task bar at the top of the page.

- **Add** - Add a new stand-alone or series of conferences
- **Edit** - Edit the details of a conference
- **Delete** - Delete a conference. A conference cannot be deleted if attendance has been taken.
- **Copy** - Copy a conference to your department. Conferences cannot be copied to other departments
- **Roster** - View the Roster configuration for this conference or series. The configuration can be changed for just this conference or series. Make selections and then save and rebuild the roster using the prompts at the bottom of the roster configuration page.
- **Attendance** - Take attendance for this conference, add or remove people from the attendance roster.
- **Search** - Search for a specific conference



Adjust the dates of conferences to view at the top right of the page. Enter the date range and click Update.



The green panel on the right of the page provides basic information for the selected conference. View information about the speaker, file attachments and links, attendee notifications, competencies and objectives and surveys. You can also view the survey settings and see how many surveys have been completed.

Morbidity and Mortality

[Edit Details](#)

M & M
4/1/2017 10:00 AM to 11:00 AM
St. Christopher Medical Center, Room 305

Notes -

[View Conferences in this Series](#)

Speakers

[Edit Speakers](#)
Andrews, Florence

File Attachments

[Edit Files](#)
[2015 Incoming test1.txt](#)

Links

[Edit Links](#)
[google](#)

Attendee Notifications

[Send Manual Notifications](#)
[Edit Notifications](#)

initial email (1 days prior)

[Competencies & Objectives](#)

Surveys

0 of 24 Surveys Completed

[Survey Settings](#)

Click **Edit Details** to go to the Conference Editor where you can edit the name, content category, sub content, etc. You can edit the date and time. However, if this is a recurring conference, changing the date creates a new series and ends the original conference. The series can also be converted to a stand alone conference here.

The screenshot shows the 'Conference Editor' window for a conference titled 'Morbidity and Mortality'. The interface includes several tabs: 'Main', 'Speakers', 'Attachments', 'Links', 'Attendee Notifications', 'Competencies/Objectives', and 'Survey Settings'. The 'Main' tab is active, displaying the following fields:

- Name:** Morbidity and Mortality
- Content Category:** M & M
- Sub Content:** ---
- Room:** Room 305
- Training Location:** St. Christopher Medical Center
- Credit Hours:** 0
- Other Credit Hours:** 0
- Curriculum Code:** (empty)
- Notes:** (empty text area with a 'Remaining Characters: 2,000' indicator)

On the right side, there are sections for configuring the conference details:

- This Conference:** Includes a date field set to 4/1/2017 with a calendar icon and a link labeled 'Convert to Stand-Alone Conference'. The time is set to 10:00 AM and the duration is 1 hour and 0 minutes.
- Recurring Series:** Includes a 'Date Range' section with dates 7/1/2016 to 6/30/2017 and an option to choose an 'Academic Year' (2016 - 2017).
- Default Duration:** Time is 10:00 AM and duration is 1 hour and 0 minutes.
- Recurrence Pattern:** Options include Daily, Weekly, and Monthly. Under 'Weekly', the days are Sunday, Monday, Tuesday, Wednesday (checked), Thursday, Friday, and Saturday.

Conference Calendars

For more information about this topic go to [Help>Tutorial Videos>Conferences- \[11.4\] Conferences>Create Custom Views](#)

View Conferences Calendar

1. Go to **Conferences > Calendar**
2. Select View options from the drop-down lists

Conference Calendar View

The screenshot shows the 'Conference Calendar View' interface. At the top, there are three tabs: 'Calendar' (selected), 'Listing By Week', and 'Listing By Date'. Below the tabs are three filter sections: 'Display' with a dropdown set to 'Current Department', 'Highlight' with a dropdown set to 'None' and a checkbox for 'Click to highlight similar conferences', and 'Custom View' with a dropdown set to 'all info' and three icons (a plus sign, a magnifying glass, and a red X). The main area is a calendar grid with columns for Sun, Mon, Tue, Wed, Thu, and Fri. The grid shows dates from 29 to 11. Each date cell contains a list of conferences with their times and titles. For example, on Sunday 29, there are two conferences: 'Morbidity and Mortality' (10:00a-11:00a) and 'Noon Conference' (12:00p-1:00p). On Monday 30, there is one conference: 'Journal Club' (10:00a-11:00a). On Tuesday 31, there is one conference: 'Simulation Lab' (8:00a-9:00a). On Thursday 10, there is one conference: 'Lecture Series' (10:00a-11:00a). The grid also includes a navigation arrow on the left and a 'Month | Week | Day | Agenda' selector on the right.

View Options and Controls

- **Display** - view conferences from the Current Department, All Departments or My Scheduled Conferences.
- **Highlight** - mark all conferences according to Category, Department or Recurring Series to distinguish them on the calendar. Click the icon adjacent to any conference and all others belonging to the same group will be highlighted. Click Remove Highlighting to turn off this feature.
- **Custom View** - choose from a set of specialized calendar views that have been configured by authorized administrators to display specific conference information. If no Custom Calendar Views have been configured there will be no selections available. Administrators interested in setting up Custom Views should review Configure Conference Calendar Custom Views for further details.
- **Go to this Date** - enter a date and click Go to quickly focus the calendar on a specific date.

- **View Conferences in a List** - View your conferences in list form including the names, dates and categories of each conference by going to Conferences > Calendar > 'Listing by Week' or 'Listing by **Date**' tab.
- If there is an attachment it will be represented by a paperclip on the calendar.

Click on a conference to see details

Conference	Date	Time	Category	Attachments/Links
Grand Rounds Department/Division: Pediatrics	10/23/2012	1:04 PM - 2:04 PM	Grand Rounds	
Grand Rounds Department/Division: Pediatrics	10/24/2012	1:04 PM - 2:04 PM	Grand Rounds	
Grand Rounds Department/Division: Pediatrics	10/25/2012	1:04 PM - 2:04 PM	Grand Rounds	Grand Rounds.docx
Grand Rounds Department/Division: Pediatrics	10/26/2012	12:00 PM - 1:00 PM	Grand Rounds	
Grand Rounds Department/Division: Pediatrics	10/26/2012	1:04 PM - 2:04 PM	Grand Rounds	

Note: On the 'Listing by Week' tab, the forward and backward arrows only change the End Date of the date range shown.

Print Friendly View

1. A Print Friendly View link appears in the upper right corner of the Conference Calendar. Clicking the Print Friendly View option will refresh the calendar page with the standard header controls suppressed and the addition of a text size control to help adjust the calendar information for print output. Click the Text Size control to increase or decrease the font size for the entire calendar. Click Normal View to return to the standard calendar view.
2. Text Size adjustments will affect print output only. Our Export to PDF will not pick up text size changes, however any PDF print option located on a user's workstation will capture text size changes. PDF printer options are commonly available and often free of charge. An internet search for 'PDF printer' will immediately highlight many options for adding this option to your system. For institutional workstations, consult your information technology staff, they often have readily available PDF software they can install or recommendations best suited to your network.

Click the links on either side of the date range to change the number of days' worth of Conferences to display in the Conference list. 0 days displays Conferences scheduled on the first day of the date range. Only Conferences scheduled within the date range can be displayed regardless of the number of times you click a - or + link.

By default, each Conference's name, Department/Division, Date, Time, and Category are displayed. The Show Details option also displays:

- Sub-Content
- Room
- Core Competencies
- Speaker
- Credit Hours (CH)
- Other Credit Hours (OCH)
- Training Location
- Curriculum Code

[View Conferences for the Week](#)

1. **Go to Conferences > Calendar**
2. Click the Listing by Week tab
3. Change the number of days in the box, if necessary, check the Show Details check box and select either the ascending or descending option.
4. Click **Update**
5. Optional: Change the display to show conferences in the current department, all departments, or my conferences, which are conferences you are on the roster for

Click the links on either side of the date range to change the number of days' worth of Conferences to display in the Conference list. 0 days displays Conferences scheduled on the first day of the date range. Only Conferences scheduled within the date range can be displayed regardless of the number of times you click a - or + link.

By default, each Conference's name, Department/Division, Date, Time, and Category are displayed. The Show Details option also displays:

- Sub-Content
- Room
- Core Competencies
- Speaker
- Credit Hours (CH)
- Other Credit Hours (OCH)
- Training Location
- Curriculum Code

View Conferences by Date

1. **Go to Conferences > Calendar**
2. Click the Listing by Date tab
3. Enter a date range, check the Show Details check box, and select either the ascending or descending option. Then, click Update

Optional: Change the display to show conferences in the current department, all departments, or my conferences, which are conferences you are on the roster for. By default, each Conference's name, Department/Division, Date, Time, and Category are displayed. The Show Details option also displays:

- Sub-Content
- Room
- Core Competencies
- Speaker Credit Hours (CH)
- Other Credit Hours (OCH)
- Training Location
- Curriculum Code

Notes

- The asc (ascending) and desc (descending) option lists the Conferences by ascending or descending date.
- A green circle with a check mark in it indicates a Required Conference
- A red square with an "x" in it indicates a Conference that is not required

Copying Conferences

For more information about this topic go to [Help>Tutorial Videos>Conferences> \[11.3\] Taking Attendance & Manage Existing](#)

You can easily copy your recurring conferences to the next year along with their notifications and surveys. When the roster is created, it will pick up the next year's statuses and rotations for the people on the roster.

1. **Go to Conferences > Manage Conferences**
2. Click on the conference to copy
3. Click on the Copy icon
4. Edit the title if needed. You might want to take out the words 'COPY OF...'
5. Check the box to make the copy a 'Recurring' conference
6. Enter a date range or use the academic year to set the dates for the conference
7. Make necessary changes to the duration or recurrence pattern
8. Information in the original conference will be copied to the new conference.
Click on a tab to review the contents.
9. When you are satisfied with the configuration, go to the bottom of the page and select 'Use default roster configuration' to pick up new information, such as the residents' new status, rotation and any new people in your program.
10. Click Save

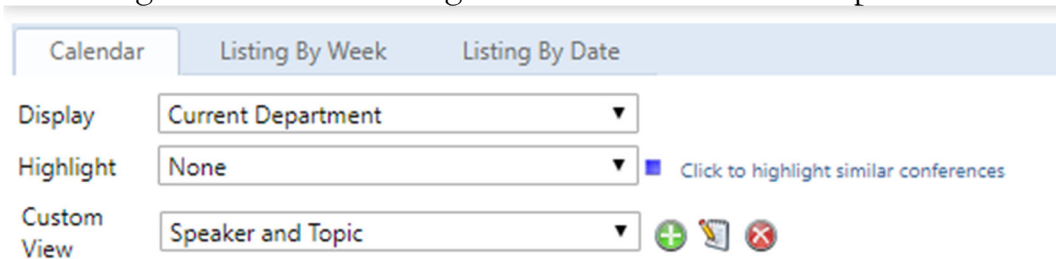
The screenshot shows the 'Conference Editor - Copy' interface. It features a navigation bar with tabs: Main, Speakers, Attachments, Links, Attendee Notifications, Competencies/Objectives, and Survey Settings. The 'Main' tab is active. The form is divided into several sections:

- Name:** A text field containing 'COPY OF Journal Club'.
- Content:** A dropdown menu set to 'Journal Club'.
- Sub Content:** A dropdown menu set to '---'.
- Room:** A dropdown menu set to '---'.
- Training Location:** A dropdown menu set to 'Aultman Hospital'.
- Credit Hours:** A text input field with '0'.
- Other Credit Hours:** A text input field with '0'.
- Curriculum Code:** A text input field with '222'.
- Notes:** A large text area with a 'Remaining Characters: 2,000' indicator.
- Scheduling:** A section with a 'Recurring' checkbox checked. Below it, a 'Date Range (max. 2 years)' section shows dates '7/1/2015' to '6/30/2016' and an option to 'choose an Academic Year' set to '2015 - 2016'. A 'Default Duration' section shows a time of '8:00 AM' and a duration of '0 hours 0 minutes'.
- Recurrence Pattern:** Radio buttons for 'Daily', 'Weekly', and 'Monthly'. The 'Weekly' option is selected, with a note: 'Conferences will occur every weekday (mon-fri)'.
- Additional Options:** A section with two checked checkboxes: 'Make conference required for attendance statistics' and 'Include on people's "My Schedule"'. There is also an unchecked checkbox for 'Add this conference to the Duty Hour logs of attendees marked Present using this assignment definition:' with a dropdown menu set to '---'.

Creating Conference Calendar Custom Views

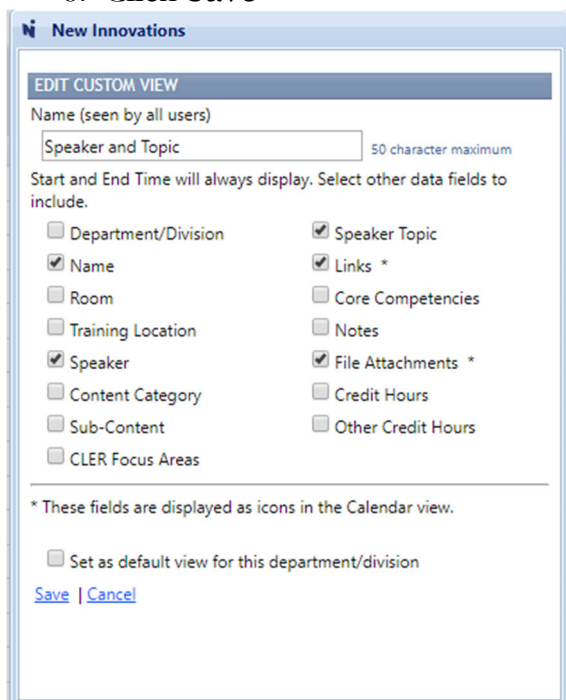
For more information about this topic go to [Help>Tutorial Videos>Conferences> \[11.4\] Creating Custom Schedule Views](#)

1. Go to **Conferences > Calendar**
2. Click the green + icon to the right of the Custom View dropdown list



The screenshot shows the 'Calendar' tab selected. Below it are three tabs: 'Calendar', 'Listing By Week', and 'Listing By Date'. There are three dropdown menus: 'Display' set to 'Current Department', 'Highlight' set to 'None', and 'Custom View' set to 'Speaker and Topic'. To the right of the 'Highlight' dropdown is a blue square icon and the text 'Click to highlight similar conferences'. To the right of the 'Custom View' dropdown are three icons: a green plus sign, a pencil/paper icon, and a red X icon.

3. Enter a name for the view
4. Select the items to display
5. You may set this view as the default view for people in your department by checking the box
6. Click **Save**



The screenshot shows a dialog box titled 'New Innovations' with a sub-header 'EDIT CUSTOM VIEW'. It contains a text input field for 'Name (seen by all users)' with the value 'Speaker and Topic' and a '50 character maximum' note. Below this is a section titled 'Start and End Time will always display. Select other data fields to include.' with a list of checkboxes: 'Department/Division', 'Name', 'Room', 'Training Location', 'Speaker', 'Content Category', 'Sub-Content', 'CLER Focus Areas', 'Speaker Topic', 'Links *', 'Core Competencies', 'Notes', 'File Attachments *', 'Credit Hours', and 'Other Credit Hours'. A note below the list states '* These fields are displayed as icons in the Calendar view.' At the bottom, there is a checkbox for 'Set as default view for this department/division' and two buttons: 'Save' and 'Cancel'.

Edit a custom view by clicking the pencil/paper icon. Delete a custom view by clicking the red X icon beside the name (see above illustration).

Editing Conferences

For more information about this topic go to [Help>Tutorial Videos>Conferences> \[11.3\] Take Attendance and Manage Existing](#)

The instructions below allow you to make changes to an existing conference, such as changing a date or time, adding a speaker or attaching a document.

1. **Go to Conferences > Manage Conferences**
2. Select a conference (Note: Adjust the date range, if necessary.)
3. Click **Edit**
4. Select the appropriate tab
5. Make the necessary changes
6. If you want this change to affect all conferences in a recurring series, check the box for 'Apply changes to other conferences in this series.'
7. Click **Save**

Editing the Recurring Series

The instructions below allow you to make changes to an existing conference, such as changing a date or time, adding a speaker or attaching a document.

Note about changing the recurring pattern or date range:

Changing the recurring pattern or date range actually resets the old series pattern to a new recurring series (because you've technically made it a different conference series) Any conferences in the former series that have attendance taken and saved will be converted to 'stand-alone' conferences.

1. **Go to Conferences > Manage Conferences**
2. Select a conference (Note: Adjust the date range, if necessary.)
3. Click **Edit**
4. Select the appropriate tab
5. Make the necessary changes
6. If you want this change to affect all conferences in the series, check the box for 'Apply changes to other conferences in this series.' Only conferences for today and after today's date are changed. When the box is checked, you decide if you want to overwrite some information in the series. If you select No, just click **Save**.

7. If you select Yes, you are presented with the remaining conferences in the series (after today's date).

Apply changes to other conferences in this series

Do you want to overwrite the speakers, links or notifications that have the same name in this series?

 Yes No

Check information to copy or uncheck items to leave out.

New Innovations □ ×

Checked items will be copied to conferences in this series.

Conference	Date/Time	MAIN	SPKR	FILES	LINKS	NTFY	OBJ/CMP	SRVY	Check All
Noon Conference	8/5/2016 12:00 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Noon Conference	8/8/2016 12:00 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Noon Conference	8/9/2016 12:00 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Noon Conference	8/12/2016 12:00 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Noon Conference	8/15/2016 12:00 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Noon Conference	8/16/2016 12:00 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Noon Conference	8/19/2016 12:00 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Noon Conference	8/22/2016 12:00 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Noon Conference	8/23/2016 12:00 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Noon Conference	8/26/2016 12:00 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Noon Conference	8/29/2016 12:00 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

If you add a note when you create the series, it copies to each conference. However, if you add a note to an existing conference, the note only appears for that one conference.

If you want to add a note and have it appear for the rest of the conference series do this:

1. Select the conference
2. Add the note
3. Check the box to 'Apply changes to other conferences in the series'
4. Click **Save**
5. Check the Main column for each conference to add the note to
6. Click **Save**

Note: you can only do this for conferences that occur in the future. If you want the note to appear for past conferences, you'll have to add those individually.

Taking Conference Attendance

For more information about this topic go to [Help>Tutorial Videos>Conferences> \[11.3 Take Attendance and Manage Existing](#)

Take Attendance by Conference

1. Go to *Conferences > Record Attendance*
2. Optional: Set date range and click Update to filter conferences by date
3. Optional: Check Show Required Conferences Only
4. Click the appropriate conference
5. Check the appropriate names as present, tardy or excused. Don't check anything to indicate that a person was absent
6. Click Save
7. Click OK

Take Attendance by Person

1. Go to *Conferences > Record Attendance*
2. Click the Attendance by Person tab
3. Select a person
4. Optional: Set date range and click Update to filter conferences by date
5. Optional: Uncheck Show Required Conferences only
6. Mark attendance as appropriate for the selected individual as present, tardy or excused. Check nothing if the person was absent
7. Click Save
8. Click OK

Log My Attendance

Attendance By Conference Attendance By Person

Record Attendance for: [Filter People](#)

Conferences From: To:

Show Only Required Conferences (Those counting toward attendance statistics)

Conferences

Attendance being taken for: Brooks, Sharon

[All Present](#) | [All Tardy](#) | [All Excused](#) | [Clear All](#) | [Save](#)

Present	Tardy	Excused	Name	Date	Content Category	Sub Content
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Grand Rounds	4/25/2013 8:00:00 AM	Grand Rounds	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Noon Conference	4/24/2013 12:00:00 PM	Didactics	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Wednesday Morning Meetings	4/24/2013 8:00:00 AM	Wednesday Morning Meetings	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Journal Club	4/22/2013 12:00:00 PM	Journal Club	

Take My Own Attendance

An individual must be assigned a Privilege Level of a least a 3 in the Conferences module of his or her Department/Division to take his or her own attendance.

1. **Go to *Conferences > Record Attendance***
2. Optional: Set date range and click Update to filter conferences by date
3. Optional: Uncheck Show Required Conferences only
4. Click on a conference
5. Mark attendance as appropriate.
6. Click Save
7. Click OK

Log My Attendance

Conferences From: 2/25/2013 To: 4/25/2013 Update List

Show Only Required Conferences (Those counting toward attendance statistics)

Conferences

Attendance being taken for: Brooks, Sharon

All Present | All Tardy | All Excused | Clear All | Save

Present	Tardy	Excused	Name	Date	Content Category	Sub Content
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Grand Rounds	4/25/2013 8:00:00 AM	Grand Rounds	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Noon Conference	4/24/2013 12:00:00 PM	Didactics	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Wednesday Morning Meetings	4/24/2013 8:00:00 AM	Wednesday Morning Meetings	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Journal Club	4/22/2013 12:00:00 PM	Journal Club	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	M & M	4/19/2013 7:00:00 AM	Morbidity and Mortality	

Taking Attendance Using a QR code

Attendees can use QR codes to scan and check in to conferences they are scheduled to attend. An administrator can print out the code and post it at the conference site. The trainees scan the code and register their attendance by checking in. This is an example of a QR Code by Conference. It includes the name, date, time and location of the conference. If the QR code was posted by room, only the room number would be shown (see example in the Conference by Room section)

- QR codes are available for every conference. However, some programs don't want trainees to take their own attendance. If that's the case, just don't use the code.
- To scan a QR code, the attendee needs a QR code scanner installed on their phone. Newer smartphones have a scanner built in, while older ones may need to download a free version.
- Attendees can check in 15 minutes before a conference begins or anytime during an ongoing conference.
- The roster is saved when an attendee checks in. Make sure to review your roster to ensure accuracy.
- PLEASE NOTE: Databases using SSO (Single Sign On):
 - QR Codes do not work with SSO unless using the SAML type. Please check with your IT department to find out what type of SSO your database uses if you are having difficulty with people checking in using the QR code.



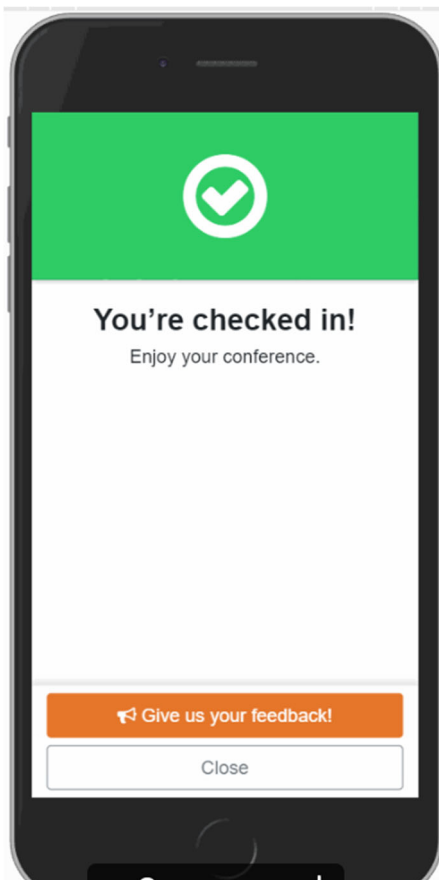
Journal Club

TIME

Monday, Oct 1
11:00 AM to 11:15 AM

ROOM

Conference Room A



There are two methods of using QR Codes:

By Conference:

Create a conference and print a QR code for that specific conference. People who scan the code will only have that conference to choose.

By Room:

Create conferences linked to a room. When the QR code for that room is scanned, people will have multiple conferences to choose: the currently ongoing conference and conferences that start within 15 minutes (of the time scanned)

Please note, if a department decides to set up QR codes by conference room, The QR code will be unique to that conference even though multiple programs schedule conferences in that room.

In the event, your institution wants to have one affixed QR code assigned to the same room throughout academic year, all departments should have the same naming convention. This means all room names should be identical across all departments (same name, capitalization, spacing, etc.).

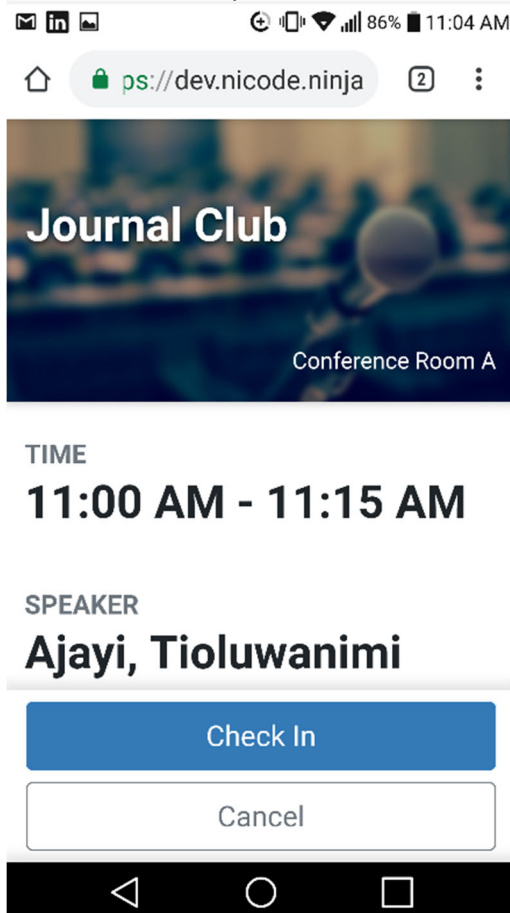
Example: If the same room is named Main Auditorium in two different departments, this will generate one QR code for multiple conferences in the same room across multiple departments.

Taking Attendance:

Attendees can take their own attendance by scanning the code. Then they will be prompted to log in to NI (if they are not already logged in). This requires

- Institution Login
- Username
- Password

When logged in, attendees are presented with a screen displaying conferences they are scheduled to attend that are currently in process or that start within the next 15minutes. They 'check in' for the conference they are attending.



This screen confirms check

Copy Attendance Records

1. Go to *Conferences > Record Attendance*
2. Click the 'copy attendance records' link.
3. Optional: Set date range and click Update to filter conferences by date
4. Optional: Uncheck Show Required Conferences only
5. Optional: Check Show only Destination Conferences having no attendance records
6. Select the Conference with attendance records you want to copy and the Conference you want to copy the attendance records to (Destination Conference)
7. Click Save

Delete a Conference with Recorded Attendance

Go to *Conferences > Record Attendance*

1. Click the Attendance by Conference tab
2. Optional: Set date range and click Update to filter conferences by date
3. Optional: Uncheck Show Required Conferences only
4. Click the Name of the Conference associated with the roster you would like to clear.
5. Click Clear All
6. Click Save

Notes about Viewing Attendance Roster

- Records that have not had attendance saved will be have a question mark in the last column on the Roster page
- Records where attendance has been saved will be have a green bullet in the last column
- Once attendance has been recorded, the Clear All link removes attendance records.
- If a box is not checked and the roster is saved, the individual will be marked absent
- A person can have multiple columns checked. For example, Tardy and Present, or Tardy, Present, and Excused
- A person marked as both Present and Excused for a conference receives an extra credit for that conference in the attendance reports. Specifically, the % Attended statistic is calculated using this formula: $(\% \text{ attended} = \text{Present} / (\# \text{ Required} - \text{Excused}) * 100)$. Therefore, a person who is marked present for two required conferences and also as excused for one of them receives a % Attended statistic of 200% $(2 / [2 - 1] * 100)$
- If conference attendance that is marked as Present or Present and Tardy is configured to be entered as a Duty Hour log automatically BUT if the Conference occurred during a locked Academic Year interval, the log entry will not be entered into Duty Hours
- The only way to remove an individual's attendance statistics for a Conference is to remove the individual from the roster. If you add them back to the roster, be sure to check an option for attendance

Managing Conference Surveys

For more information about this topic go to [Help>Tutorial Videos-Conferences- \[11.6\] Conferences-Surveys](#)

Completing Surveys

Once the survey settings are saved, the survey will be available at the conference end time. If enabled, attendees can receive an email notifying them that the survey is available. A link to the survey is also provided in the Notifications panel of each attendee's Home Page that takes them to the list of pending surveys they have been asked to complete.

If an attendee is unable to complete the survey before it expires, the expiration date in the survey setup can be adjusted to make the survey available again. Change the accessible date in the conference survey settings for that particular date and save.



View Completed Surveys

The Manage Conferences page displays an icon in the Surveys column for any conference with a survey attached.

- Administrators (Level 4 and 5 users): View completed forms by using the Details link on the Manage Conference Page. Click Details to view the form and attendance data. The link at the bottom right can be used to view all forms.
- Residents and Faculty (Level 2 and 3 users): Can view surveys you filled out by going to **Surveys > My Surveys**. Use the tabs to view surveys assigned to you that are incomplete and surveys you have completed. There is also a tab to view results of surveys completed about you as a speaker.

Manage Completed Surveys

Use the Survey Status page to manage surveys after distribution. Administrators can go to **Conferences > Surveys > Survey Status** to do the following:

- Complete surveys for others
- Delete survey responses - Deletes the survey responses, then replaces it with a blank survey. Since the surveys are dynamically created according to the survey settings and roster, the actual survey cannot be deleted. Residents, however, can 'opt out' of a survey, removing it from their queue.
- Check the Hide Expired filter to exclude the expired survey responses
 Hide Expired  to 
- View completed surveys

The columns can be filtered by using the funnel icon.

Surveys that have been skipped (opt Out) by the recipient cannot be returned to them.

Deleting Conferences

For more information about this topic go to [Help>Tutorial Videos>Conferences> \[11.3\] Take Attendance and Manage Existing](#)

1. Go to **Conferences > Manage Conferences**
2. Select a conference. Adjust the date range, if necessary.
3. Click Delete
4. If it is a recurring conference, select either delete only this conference or delete the entire recurring group/series
5. Click Delete

Notes

- Conferences cannot be deleted if attendance has been taken. Clear the attendance roster and then delete the conference.
- Notices are not sent to attendees when a conference is deleted or canceled. It is simply removed from the calendar view.

Configuring Default Roster & Attendance Requirements

Edit Default Roster Configuration

Edit the Default Roster Configuration to redefine how people are selected to be assigned to a Conference when it's created. Rosters for existing Conferences will not be affected.

1. Go to Conferences > Setup > Roster

2. Select one of two ways to build your roster configuration:

1. Build Attendance Roster by Rotation and Status - This method builds the roster based on the status of people scheduled on rotations selected here. The system goes to the block schedule and only picks up people with the statuses selected on rotation selected. An example of a time when you would use this option is when residents scheduled on a surgery rotation should attend M & M conferences.
2. Build Attendance Roster by Department Personnel - This method builds the roster by including all of the people currently in your department with the selected statuses. The status is determined by the resident's training record. If a training record does not exist, such as with faculty, then the system utilizes the block schedule to check for statuses. If the individual does not have a training record nor a block schedule, then the system checks the demographic record for the status.
 - Check the box for Include People from My Divisions (if applicable) on Attendance Roster when it is automatically built.

Filter the list of People

Click the Filter by Status and/or the Filter by Rotation link if you wish to restrict the people listed by their assigned Status Type or Rotation. Select one or more Status Types or Rotations, and then click the Update list of potential people above link.

If you filter by Rotation, click the Only show rotations from [Active Department/Division Name] if appropriate.

Add/Remove by Editing Default Roster Configuration

Changing a specific Conference's Default Roster configuration only changes the Default Roster Configuration for that Conference (unless the conference is built in a recurring series; you'll have an option to apply changes to other conferences as well). Other Conference rosters will continue to be based on the original Default Roster configuration.

1. **Go to Conferences > Manage Conferences**
2. Optional: Set date range and click Update to filter conferences by date
3. Optional: Uncheck Show Required Conferences only
4. Click the Name of the Conference you wish to add or remove people from
5. Click Roster
6. Configure the roster as desired
7. Optional: Check the box for *Save the Roster Configuration and Rebuild the Rosters for All Conferences in this Recurring Series*
8. Click the Save Configuration and Rebuild Roster link.

Notes:

A red asterisk (*) Indicates that attendance has already been taken and at least one person is marked as present, tardy, or excused.

If attendance has been taken for an individual, that individual and his or her attendance will remain on the roster.

If attendance has been taken AND if the Conferences module has been configured to add hours to attendee's Duty Hours after they were marked present AND an individual has confirmed/approved those logged hours in the Duty Hours module, then that individual cannot be removed from the roster.

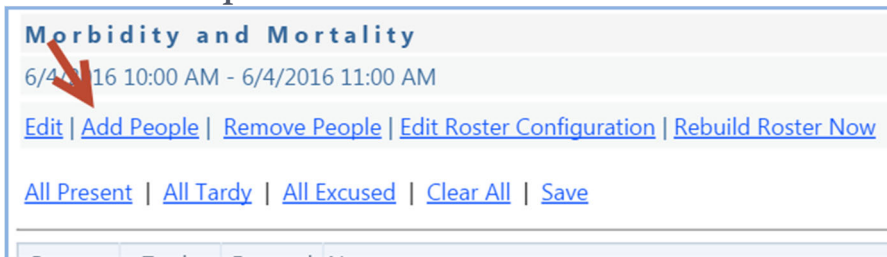
Edit Attendance Requirements

1. **Go to Conferences > Setup > Requirements**
 2. Edit the requirements as desired
 - Option 1: Set Requirements with a Departmental Percentage - Change the percentage required and click Save Departmental Requirements
 - Option 2: Set Requirements by Status Type
 - Option 3: Set Requirements by Status Type and Content Category
- For Options 2 and 3, use the Add Selected Requirement and Delete Selected Requirement links to edit your attendance requirements.

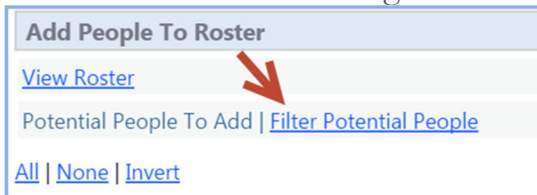
Manually Adding/Removing Someone on Conference Roster

Add Person from your own Department/Division

1. **Conferences > Manage Conferences**
2. Optional: Enter dates and click Update to restrict the Conferences listed to just those that occur within a specific date range
3. Click on the appropriate conference
4. Click the **Attendance** icon in the top banner
5. Click **Add People**



6. Click **Filter Potential People** to find people from your department who are not on the default roster configuration.



7. Check the names of people to add to the roster
8. Optional: Check the box to 'Add the Selected People to All Conferences in this Recurring Series from 'Date' to 'Date''
9. Click **Add Selected People**
10. Click **OK**
11. Click **View Roster** to ensure that the people you intended to select were actually added to the roster. Manually added Attendees are highlighted in blue.

Attendance Roster				
Total Attendees: 10 - Attendees to show on each page: 75				
Name	Status	Dept./Div.	Primary Rotation	●/?
Archer, David A	PRG 1	FM-Family Medicine	FM:Geri-PCMH	?
Wise, Craig	PRG 1	FM-Family Medicine		?
Wolf, Becky	PRG 1	FM-Family Medicine	FM:ComMed-SC	?
Aktar, Aboud	PRG 2	FM-Family Medicine	FM:Derm-SC	?
Julka, Vijay	PRG 2	FM-Family Medicine	FM:MedA-SC	●
O'Doull, Kathleen	PRG 2	FM-Family Medicine	FM:Card-SC	?
Parke, Brenda	PRG 2	FM-Family Medicine	FM:Derm-SC	●
Baker, Thomas Eugene	PRG 3	FM-Family Medicine	FM:AmbGyn-SC	?
Gomez, Maria	PRG 3	FM-Family Medicine	FM:MedC-SC	?
Wallace, Charles	PRG 3	FM-Family Medicine	FM:MedB-SC	?

[Export to Excel](#)

From Another Department/Division

1. Go to *Conferences > Manage Conferences*
2. Optional: Enter dates and click Update to restrict the Conferences listed to just those that occur within a specific date range
3. Click on the appropriate conference
4. Click the **Attendance** icon in the top banner
5. Click **Add People**
6. Towards the bottom of the page, select a department/division
7. Optional: Use the Filter by Status or Filter by Rotation links to filter the list of people shown
8. Click **Update list of potential people above**
9. Check the names of people to add them to the roster
10. Optional: Check the box to 'Add the Selected People to All Conferences in this Recurring Series from 'Date' to 'Date''
11. Click **Add Selected People**
12. Click **OK**
13. Click **View Roster** to ensure that the people you intended to select were actually added to the roster. Manually added Attendees are highlighted in blue.

Edit Attendance Roster Manually

Add People To Roster

[View Roster](#)

[Go to Attendance Roster](#)

Potential People To Add | [Filter Potential People](#)

[All](#) | [None](#) | [Invert](#)

Name	Status	Dept./Div.	Primary Rotation
<input type="checkbox"/> Lee, Lisa	Administrator	FM-Family Medicine	
<input type="checkbox"/> Maxey, Lisa	Coordinator	FM-Family Medicine	
<input type="checkbox"/> Antonucci, Michael	Faculty	FM-Family Medicine	FM:FPC2-PCMH
<input type="checkbox"/> Black, James	Faculty	FM-Family Medicine	FM:SportsMed-SC
<input type="checkbox"/> Jones, Robert	Faculty	FM-Family Medicine	FM:Card-SC
<input type="checkbox"/> Matthews, Kathy	Faculty	FM-Family Medicine	
<input type="checkbox"/> Miller, Jerry	Faculty	FM-Family Medicine	FM:MedB-SC
<input type="checkbox"/> Motts, Frank J	Faculty	FM-Family Medicine	FM:Derm-SC
<input type="checkbox"/> Schmidt, Denise	Faculty	FM-Family Medicine	FM:Geri-PCMH
<input type="checkbox"/> Martin, Cassidy	Nurse	FM-Family Medicine	
<input type="checkbox"/> Yoho, Laura	Nurse	FM-Family Medicine	
<input type="checkbox"/> Beres, Amanda	Program Director	FM-Family Medicine	FM:AmbGyn-SC

[Export to Excel](#)

Date Range for this Recurring Series: 7/1/2015 - 6/30/2016

Add the Selected People to All Conferences in this Recurring Series From To

Filter People Above

[All](#) | [None](#) | [Invert](#) | Only show people from these departments

- ▲ Department of Anesthesiology/Anesthesia
 - Department of Emergency Medicine
 - ▼ Department of Emergency Medicine/Emergency Medicine
 - Department of Emergency Medicine/Emergency Medicine/Pediatrics
- 1 Selected:

• Don't filter by Status

[All](#) | [None](#) | [Invert](#) | Only show people of these status types

- ▲ PA 1
 - PA 2
 - ▼ Preceptor
 - PRG 1
 - PRG 2
 - PRG 3
 - PRG 4
 - PRG 5
 - PRG 6
- 3 Selected:

• Filter by Rotation

Remove Person

1. **Go to Conferences > Manage Conferences**
2. Optional: Enter dates and click Update to list conferences that occur within a specific date range
3. Click on the appropriate conference
4. Click the Attendance icon in the top banner
5. Click **Remove People**
6. Select the person or people you want to remove from the roster
7. Click **Remove Selected People**
8. Click **OK**

Note: Circumstance when a person cannot be removed from roster:

- Attendance has been taken and the person has been marked present,
- Conference module has been configured to add hours to attendee's Duty Hours after they were marked present,
- The person has already approved the conference logs in the Duty Hours module