

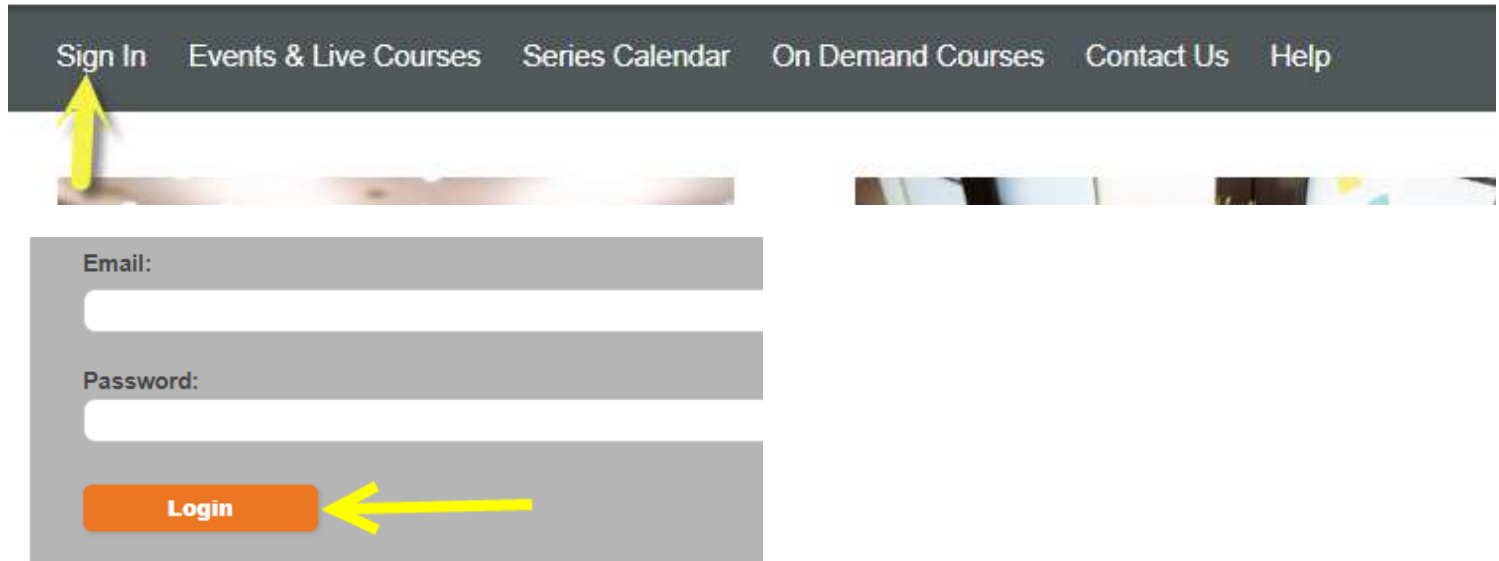


Avera CE Portal: Obtaining Bio/CV

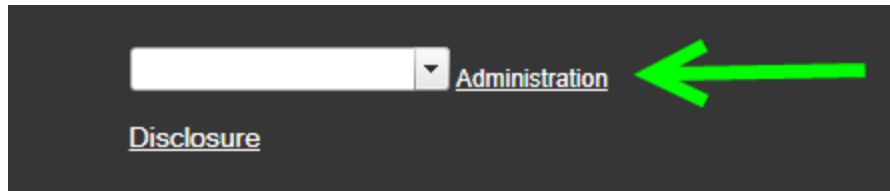
To assign a Bio or a CV form to a faculty member.

1. Login by clicking the following link: <http://avera.cloud-cme.com>.

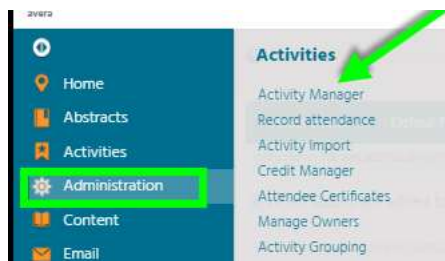
To Sign In, enter your email address and password and click Login.



2. After logging into your account, click the Administration button at the bottom of the page.



3. Click Activities – Activity Manager



For assistance, contact the Talent Development Team by phone at 605-322-7879 or email averacontinuingeducation@avera.org.



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4. There are two options to access activity:

a. Type name of activity in field. Click on activity name.

Instructions: To edit and work with a single event that already exists, begin by selecting an activity.

Live Cour Parents Only

Live Course No CTC (16310)	2024
Live Course CTC (16311)	

Click box in front of Activity Planning Submissions

4 Hide Inactive Activity Planning Form Submissions

b. Enter Activity ID number in field and click filter button to Equal to

Activity ID	Calendar	Edit
16311		
16311		
16310		
16305		
16298		

Filter dropdown menu:

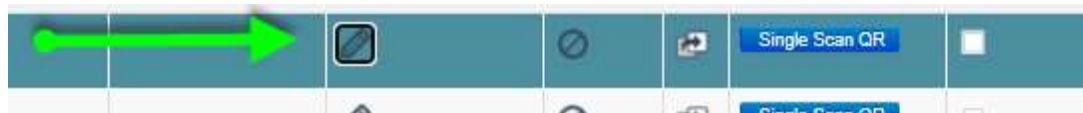
- NoFilter
- EqualTo
- NotEqualTo
- GreaterThan
- LessThan
- GreaterThanOrEqualTo
- LessThanOrEqualTo
- Between

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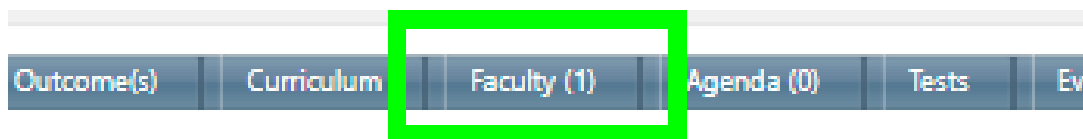


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5. Click pencil icon



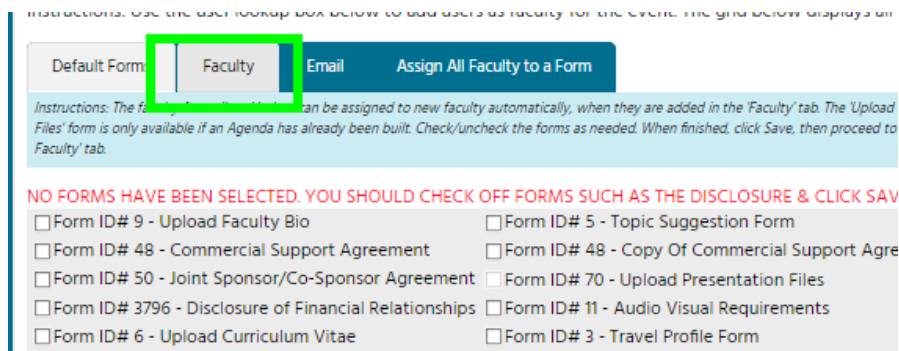
6. Click Faculty tab



7. There are two options to assign a CV / Bio to a faculty member:

Option #1

a. Click Faculty tab



Click on faculty name

	Faculty	Last Name	Activity	Activity Date	Excl From Eval
	Sharon Test			3/1/2021	<input type="checkbox"/>
	Select				

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Check the box in front of the form you want to assign to faculty. Click Update button. Planner should receive email notifying them of the task assigned.

Tasks for Sharon Test - Live Course <TC>

Assigned Forms Photo & Profile Uploaded Files Past Courses

- Upload Faculty Bio
- Topic Suggestion Form
- Commercial Support Agreement
- Copy Of Commercial Support Agreement
- Joint Sponsor/Co-Sponsor Agreement
- Upload Presentation Files
- Disclosure of Financial Relationships
- Audio Visual Requirements
- Upload Curriculum Vitae
- Travel Profile Form
- Hotel Housing Form

Honorarium (optional): \$0.00

HotelNights (optional): 0.0

Comments (optional):

Update

Option #2:

a. To assign a form to all faculty, click the Assign All Faculty to a Form tab.

Default Forms Faculty Email Assign All Faculty to a Form

When faculty are added to this activity, create a complimentary registration for them.

Choose all forms and click Update button

Default Forms Faculty Email Assign All Faculty to a Form

OPTIONAL: Use this screen to assign all selected faculty to a specific form after initial faculty assignment has taken place. This step is typically used to add a form later on, after initial assignments have taken place. By checking a form below and clicking update, you will add that form to all selected faculty regardless of the default form assignments.

- Form ID# 9 - Upload Faculty Bio
- Form ID# 48 - Commercial Support Agreement
- Form ID# 50 - Joint Sponsor/Co-Sponsor Agreement
- Form ID# 3796 - Disclosure of Financial Relationships
- Form ID# 6 - Upload Curriculum Vitae
- Form ID# 2 - Hotel Housing Form
- Form ID# 5 - Topic Suggestion Form
- Form ID# 48 - Copy Of Commercial Support Agreement
- Form ID# 70 - Upload Presentation Files
- Form ID# 11 - Audio Visual Requirements
- Form ID# 3 - Travel Profile Form

Update

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Faculty will be notified of task that needs to be completed via email with a link to the Faculty page located in their Avera CE Portal account. Click on the button in front of the task to complete the task.

My Tasks

1 Global Tasks Activity Tasks Upcoming Presentations

Global tasks are tasks that apply to all activities. The below tasks can be completed at any time. The below tasks will expire, and an expiration date will show.

Status	Task Name	Expiration Date	Date Completed
Begin	Upload Faculty Bio	Tuesday, July 17, 2018	Monday, July 17, 2017
Update	Disclosure of Financial Relationships	Tuesday, February 15, 2022	Monday, February 15, 2021
Begin	Upload Curriculum Vitae		

If the faculty has not completed the task, there are two options to remind the faculty.

Option #1:

In Activity editor (follow steps 1 – 5), in Faculty tab check the name of the faculty and click on Email tab.

Instructions: Use the user lookup box below to add users as faculty for the event. The grid below displays all the relevant information for faculty assigned to this event.

Default Forms Faculty **Email** Assign All Faculty to a Form

When faculty are added to this activity, create a complimentary registration for them.

Add Faculty Already In CloudCME Add Faculty ... In CloudCME Add New Individual

	Faculty	Last Name	Activity	Activity Date	Exclude From Eval	Disclosure	Disclosure Date	Reviewer(s)
<input type="checkbox"/>	Sharon Test	Test	Live Course CTC	3/1/2021	<input type="checkbox"/>	NO DISCLOSURE	1/1/1900	
Select								

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Complete the required fields – Subject Line and message. Can customize the message depending on if the email is going to multiple faculty or one faculty.

NOTE: email will be sent to planner at the email listed in the field next to Send Test Message box. To send email to faculty, **uncheck** the Send Test Message box.

Option #2:

- a. Click Assign All Faculty to Form
- b. Check forms required and Update button
- c. Click Email button and follow above steps

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NOTES:

a. After assigning the form, click on the faculty name to see when form was assigned.

Assigned Forms Photo & Profile Uploaded Files Past Courses

- Upload Faculty Bio - Assigned: 3/9/2021
- Topic Suggestion Form
- Commercial Support Agreement
- Copy Of Commercial Support Agreement
- Joint Sponsor/Co-Sponsor Agreement
- Upload Presentation Files - Assigned: 3/9/2021
- Disclosure of Financial Relationships
- Audio Visual Requirements
- Upload Curriculum Vitae - Assigned: 3/9/2021
- Travel Profile Form
- Hotel Housing Form

Honorarium (optional):

Hotel/Nights (optional):

Comments (optional):

b. The grid in the Faculty tab will show at a glance which forms are assigned and if they have been completed.

Faculty	Last Name	Activity	Activity Date	Exclude Form Eval	Disclosure	Disclosure On	Photo	Assigned Forms	# Presentations	Comments	Honoraria	Organization	Title
<input type="checkbox"/>	Suzanne Test	Test	3/1/2021	<input type="checkbox"/>	NO DISCLOSURE	11/1/2000		Upload Presentation Files INCOMPLETE, Form ID# 9 - Upload Faculty Bio INCOMPLETE, Form ID# 8 - Upload Curriculum Vitae INCOMPLETE	0		\$0.00	101	1010
Select											\$0.00		

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