
USER MANUAL

Table of content:

Overview of the service	2
Institution administrator	4
Profile	4
Update password	4
Personal information	4
Institution	4
View/Edit institution information	4
Departments	5
View departments:	5
Department administrators	5
CME	6
List CME-s	6
Member	7
New member - View/Search/Register	7
View/Search Institution members –	8
Mail	8
Send email to all members of the institution	8
Send email to selected members –	8
Send Invitation mail –	8
View/Search/Create mail templates –	8
View/Search/Register sponsors	9
Needs assessment	9
Department administrator	10
Update password	10
Personal information	10
Plan CME	10
List CMEs	10
Member:	12
Department members	12
New Member – Search/Register	12
Mail	12
Send mail to all members of the institution –	12
Send mail to all members of the department	12
Send email to selected members	12
View/Search/Create mail templates.	13
Sponsor.	13
Assessment process	13
Member area	14
List CME	14
Profile	15
Email options	15
Membership	15

Overview of the service:

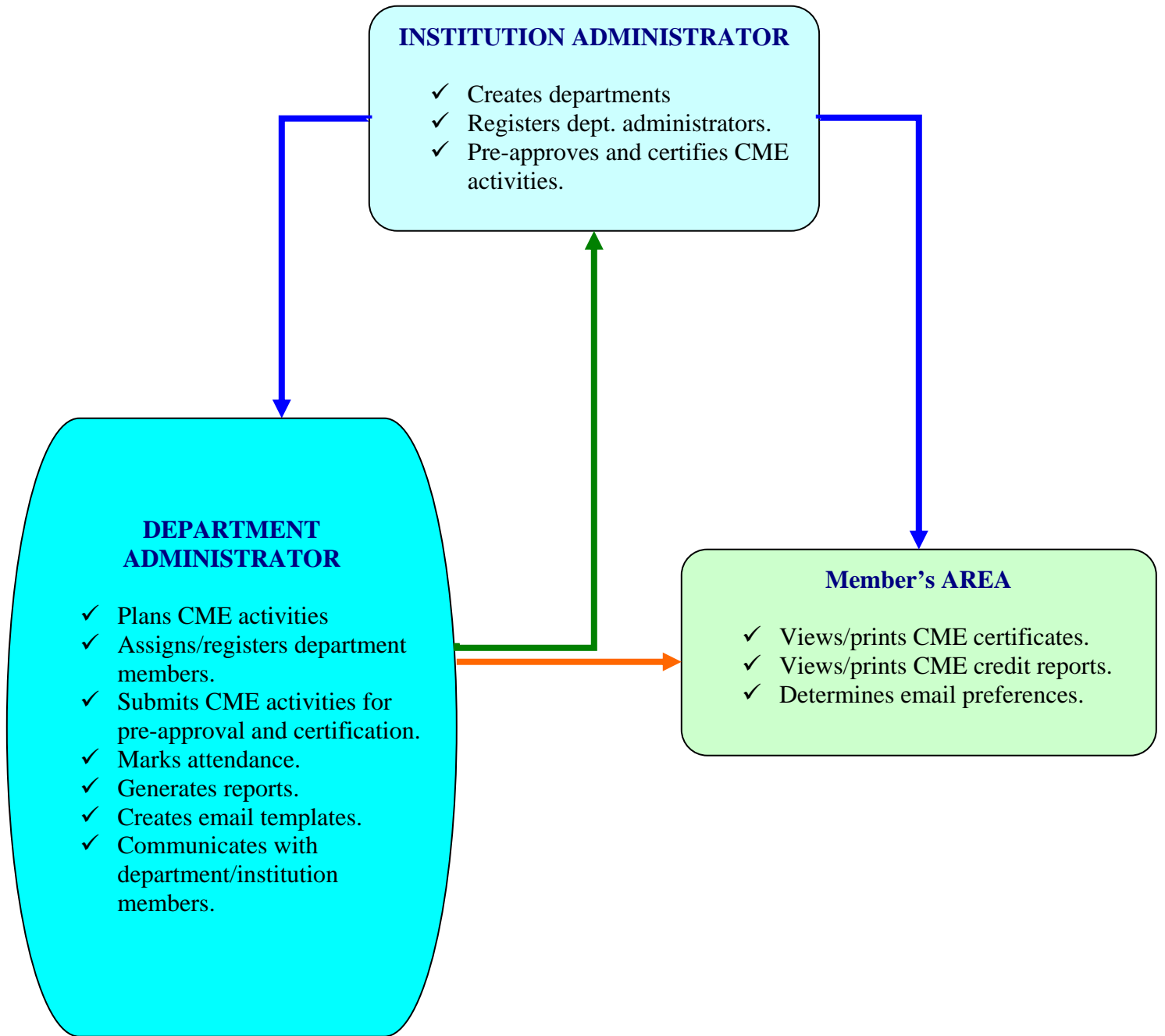
Nevikor facilitates the planning, administration and reporting of CME activities. There are three main user levels – Institution administrator, department administrator and members. The Institution administrator sets up the institution account, creates departments that provide CME activity, assigns/registers department administrators and uploads CME accreditation statements, Institution logo, official signature etc.

The departments administrators plan and conduct CME activities, register members, mark attendance, announce CME activities, export data, generate reports.

Workflow example (see on line video tutorial):

The department administrator plans Grand Rounds on “Sepsis” for September 1, 2006. He/she enters the name of the speaker (either links to an existing speaker in the database, or registers a new speaker in the database), uploads speaker’s CV, enters the learning objectives, and uploads disclosure statement/form and any agreements.

The CME is submitted for pre-approval to the Institution administrator who reviews the initial data. If it satisfies the requirements of the CME committee he/she pre-approves the activity. Once the activity takes place, the department administrator summarizes the evaluations, marks the attendance, reviews and enters the associated expenses, and submits the activity for certification. The institution administrator reviews the submitted information and, if it satisfies the CME committee requirements, certifies the activity. Once the activity is certified, all attendees receive their CME certificates and credits electronically.

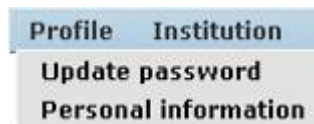


Institution administrator

Available Menus and their function



Profile



Update password

- i. To change password - enter new password in the space provided. Confirm password and click "Submit". If you change your mind, press Cancel/Back.

Personal information

- ii. These fields contain the personal information for the institution administrator and are controlled by the administrator. The SS# is used only to uniquely identify the person in the system and remains hidden at all times.



Institution

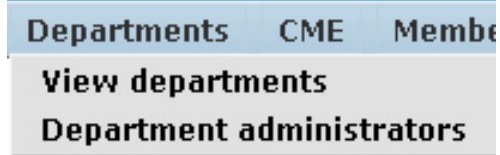


View/Edit institution information

- i. This page contains the information for the institution. Only institution administrators have access and the right to change this information. Changes become active once submitted.
- ii. The CME accreditation statement will be shown on all certificates. It can also be included in e-mails, flyers etc.
- iii. The address and e-mail address provided will be used for all official communications, including subscription and billing.
- iv. The fields for the signatory will hold information that will appear on the official certificates. Please follow the recommended guidelines for the resolution and size of the uploaded images for best end results.

Departments

Important: Departments and administrators are created in two separate steps. After creating all necessary departments, the institution administrator must create accounts for the department administrators and assigns them to the respective department as described bellow.



View departments – This menu allows the following functions:

- i. Create department – creates new department. Once created, departments can be edited but not deleted.
- ii. If you have created a new department, an administrator must be assigned to the department as described bellow. More than one administrator can be assigned to a given department. Once an administrator is assigned to a particular department, this administrator cannot be assigned to another department. In other words, one administrator cannot control two different departments.

To assign an administrator, first select the department by clicking on the box next to its name. Next, click “Add administrator”. Choose an administrator for the department from the list on the next screen. ***If no administrators are created or all of them are already assigned, this screen will be empty. Only unassigned administrators will be listed!***

- iii. View/Edit – allows editing of the department name.
- iv. Assign/Add/Delete administrators – allows the assignment of administrators to a given department. These department administrators will have access and rights to manage the departmental CME activity. **Administrators that are assigned to one department cannot manage another department with the same login e-mail.** If there is a situation where one person has to manage two or more departments, the institution administrator must create two or more departmental profiles with ***different*** login e-mails in order to achieve this.
- v. Department administrators» Assign/Add/Delete administrators » Add Administrator» Register – Allows the registration of a new administrator.

Departments administrators – shows all registered administrators and their respective departments.

Available options:

- i. Register – opens up the new department administrator registration screen.
- ii. Details – shows the available information for the selected administrator.
- iii. Disable – allows the institution administrator to disable the account of a department administrator.
- iv. Activate – allows the institution administrator to activate a previously disabled account.

CME

CME Memb

List CME-s

List CME-s – This is the main screen for managing the CME activities at the institutional level.

The available functions are:

- Pre-approval of CMEs
- Certification of CMEs that have taken place.
- Denial of pre-approval/certification.
- Ability to send a note to the department requesting pre-approval/certification.
- Review of all the available information for a given CME

The recommended work flow is as follows:

The department administrator plans a CME activity and after entering all required information submits the CME for pre-approval. Once submitted, the CME will appear on the screen of the institution administrators that have been authorized to pre-approve/approve CME activities.

Attendance can be marked by the department administrator only on or after the date of the activity.

Credits can be obtained by the participants only after the CME activity has been certified by the institution administrator.

Menu options:

The screenshot shows the 'List CME-s' interface. At the top, there is a 'Year' dropdown menu set to '2006'. Below it are buttons for 'Show', 'Search', 'Planned', 'Pre-approved', 'For certification/Certified', 'Forthcoming', 'Show all', and 'CME Report'. There is also an 'Export CME data' button. Below these are buttons for 'Details', 'Edit', 'List attendees', 'Pre-approve', 'Decline pre-approval', 'Certify', 'Decline certification', and 'Comments'. The main table has columns for 'Sel', 'Date', 'Credits', 'Topic', 'Status', 'Department', and 'Comments'. The first row shows a checkbox, the date 'Jul 05 2006', '2' credits, the topic 'Current Treatment Options in', 'Approved' status, 'Medicine' department, and 'no' comments.

Sel	Date	Credits	Topic	Status	Department	Comments
<input type="checkbox"/>	Jul 05 2006	2	Current Treatment Options in	Approved	Medicine	no

“Show” – in combination with the drop down menu for the year, filters all CME activities for the particular year.

“Search” – allows the search of all CME activities based on criteria defined by the administrator. For example, all CME activities between two dates, all grand rounds, activity by topic, etc. (Please refer to the help screen available when the “Search” option is chosen for detailed information on how to use the “search” option).

“Show planned” – will filter all CMEs that are planned or pre-planned, regardless of their date. Once these CMEs are pre-approved they will no longer be selected.

“Show pre-approved” – shows all pre-approved CMEs, regardless of their date.

“Show submitted for certification” – shows all CMEs that are submitted for certification or certified.

“Show forthcoming” – this filters all future CMEs, regardless of their status.

“Show all” – shows all CMEs that are in the system.

“CME Report” – generates a CME report.

“Export CME Data” – exports the CME data into an excel file

All of the following functions require that the box next to the CME of interest is checked.

“Details” – shows all details for the particular CME. Information cannot be edited.

“Edit” – allows the editing of the CME information.

“List attendees” – shows all attendees of the CME/Allows addition of attendees.

“Pre-approve” – allows the institution administrator to pre-approve one or more CMEs.

“Decline pre-approval” – sends the CME back to the department administrator in case it cannot be pre-approved (i.e. does not follow the established by the institutions requirements). It is recommended, that in case the CME is not pre-approve to add “Comment” for the reasons.

“Certify” – certifies the CME that has already taken place in accordance with the Institution requirements. CME credits are earned only if the CME is certified by the institution administrator.

“Decline certification” – declines certification of a CME that does not fulfill the standards established by the institution. The reasons can be entered using the “Comments” option.

“Comments” – allows the administrators to exchange comments related to the CMEs in question.



Member



New member - View/Search/Register.

This menu allows the institution administrator to:

- i. Register new members
- ii. Search function – Using the “Search” function, the institution administrator can look for a specific member by using the available search fields. For example, searches can be performed by using any of the search fields as well as a combination of criteria. Using the last name field and entering “Smith” will show all members with last name “Smith”. The search screens allow any combination of search fields or the combination of more than one

criteria for a given field. In the above example, after entering “Smith” one can enter another last name, i.e. “Johnson”. This will select everybody with last name “Smith” or “Johnson”. The available possibilities are numerous. Defining other fields, one can select all Internists with the above names, or everybody in New York and Boston etc. See the video example.

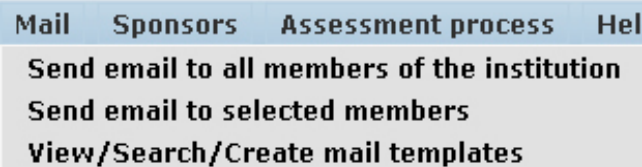
iii. View – shows the available information for a member.

View/Search Institution members –

This option is similar to “New Member - View/Search/Register” but is limited to the members of the institution only.



Mail The mail option provides a convenient way to communicate with the members of the institution or members not belonging to the institution who have indicated in their personal profiles that they would like to receive specific information. The available options are:



Send email to all members of the institution

sends email to all members of the institution. The actual email addresses are not revealed but the administrator will see how many recipients there are.

Send email to selected members –

allows the selection of email recipients based on personal criteria or the type of email that is being sent.

Send Invitation mail –

sends an email to invite someone to register as a member.

View/Search/Create mail templates –

allows the administrator to create different e-mail templates. For example, CME announcements, invitations for surveys, announcements of employment opportunities etc. See the demo video.

Sponsors

[Sponsors](#) [Assessment process](#)

[View/Search/Register sponsors](#)

[View/Search/Register sponsors](#)

Assessment process

[Assessment process](#)

[Needs assessment](#)

Needs assessment

allows the administrator to document and manage the needs assessment process.

Department administrator

The main functions of the department administrator are to plan and administer CME activities, maintain the list of members associated with the department and award credits for participation in CME activities.

The following menu options are available for the department administrator:



Profile – there are two sub-menus:

Update password

change you password and submit changes.

Personal information

the email that is entered on the Personal information page is *your* username.
(See the online video tutorial)



CME – has two submenus – “Plan CME” and “List CMEs”. This is the main screen for the department administrator.

Plan CME

Provides the ability to plan a CME activity. The department administrator determines the day, starting hour, end hour and the number of CME credits for the activity. He/she chooses a speaker from those already registered in the database or registers a new speaker. The learning objectives, together with any other available information, are entered in the corresponding fields. Once submitted, the CME activity can be sent electronically to the institution administrator for pre-approval.

List CMEs

- shows all CMEs created by the department administrator together with their status. The following options are available:
- View CMEs for a particular year.
- Plan CME (same as above).
- Search – allows search of specific a CME. For example, all CMEs between two dates, search by speaker, topic etc.

- Planned – will show all CMEs that are planned.
- Pre-approved – filters the CMEs that are pre-approved.
- Submitted for certification – shows CMEs that have been submitted for certification by the Inst. administrator.
- Forthcoming – shows all planned and pre-approved CMEs.
- Show all – shows all CMEs in the system – past and future.
- Export CME data – allows the data for all CMEs to be exported in Excel file format.

The second row of options have the following functions (all of them require the selection of a CME prior to clicking on the option):

- View/Edit – shows all available information and allows editing of the latter.
- Delete – deletes the selected CME. If the CME has been pre-approved or certified it can not be deleted.
- Pre-approval – sends the selected CME for pre-approval by the institution administrator. You can select more than one CME and send all of them for pre-approval at the same time.
- Mark/View Attendance – this menu is available only on and after the date the CME is to take place. The administrator can mark attendance, delete attendance and add new members if needed.
- Certify – once all necessary documents are presented and uploaded for the particular CME, the department administrator provides summary evaluation for the activity, marks attendance and submits the CME for certification by the institution administrator. Only when the CME is certified can the participants claim credits (credits, together with an online certificate will appear on their login).
- Comments – allows the department administrator to respond to comments from the institution administrator or to place his/her own.

Member:

Department members

View/Search/Register – shows all members of the department, allows the department administrator to see their accumulated CME credits. The “Search” function provides the ability to search among the department members.

New Member – Search/Register.

On this screen, the search function searches among all registered members in the database. This is an essential step before registering a new member, as the member may already exist in the database. If the search is unsuccessful, the department administrator can register the new member and associate him/her with the department.

Mail

Send mail to all members of the institution –

Generates and sends an email message to all members associated with your institution (for example, if you want to invite everybody to a certain CME activity or just make an announcement).

Send mail to all members of the department

Similar to the above, but limited to the members of your own department.

Send email to selected members

Allows you to define criteria for email recipients. Only those that satisfy this criteria will receive the email message. For example, allows the sending of an email to a single individual, to all gastroenterologists, etc. (see online video tutorial).

View/Search/Create mail templates.

Powerful tool for managing your email templates. Templates can be designed according to your needs. For example, you can have a template that announces a CME activity. This template will merge all the data from the already created CME (date, time, speaker, learning objectives, sponsor, disclaimer – see online tutorial).



Sponsor – the default sponsor is the institution. If needed, additional sponsors can be selected/entered on this page.



Assessment process – provides the ability to manage and monitor the Needs assessment process.

Member area

The registration for the members is free. Members can be registered by an institution or department administrator or on their own (from the home page at www.nevikor.com). Once registered, members receive automatically generated passwords and need to confirm their accounts.

The first screen on login is the List CME screen:

List CME

Shows all attended and certified CMEs (see bellow).

NEVIKOR™ Test V Anna

Profile CME Membership Help Logout

List CME-s

List attended CMEs

Year 2006 Show

View Details Certificate

Sel	Date	Topic	Speaker	Earned credits
<input type="checkbox"/>	Jun 12 2006	Anemia	Test Eddy	1
<input type="checkbox"/>	Apr 15 2006	HTN		1
<input type="checkbox"/>	Feb 21 2006	Hosp A Peds Test Feb 21		1
<input type="checkbox"/>	Feb 20 2006	HA Peds feb 15 Test	Test Alice	1
<input type="checkbox"/>	Feb 20 2006	Hosp A Peds Test Feb 20		1
<input type="checkbox"/>	Feb 14 2006	ER Feb 14	Test Eddy	1
<input type="checkbox"/>	Feb 14 2006	Hosp C NeurFe14	Test Feli	1
<input type="checkbox"/>	Feb 13 2006	HA test eb 13	Speaker First	1
Total				8

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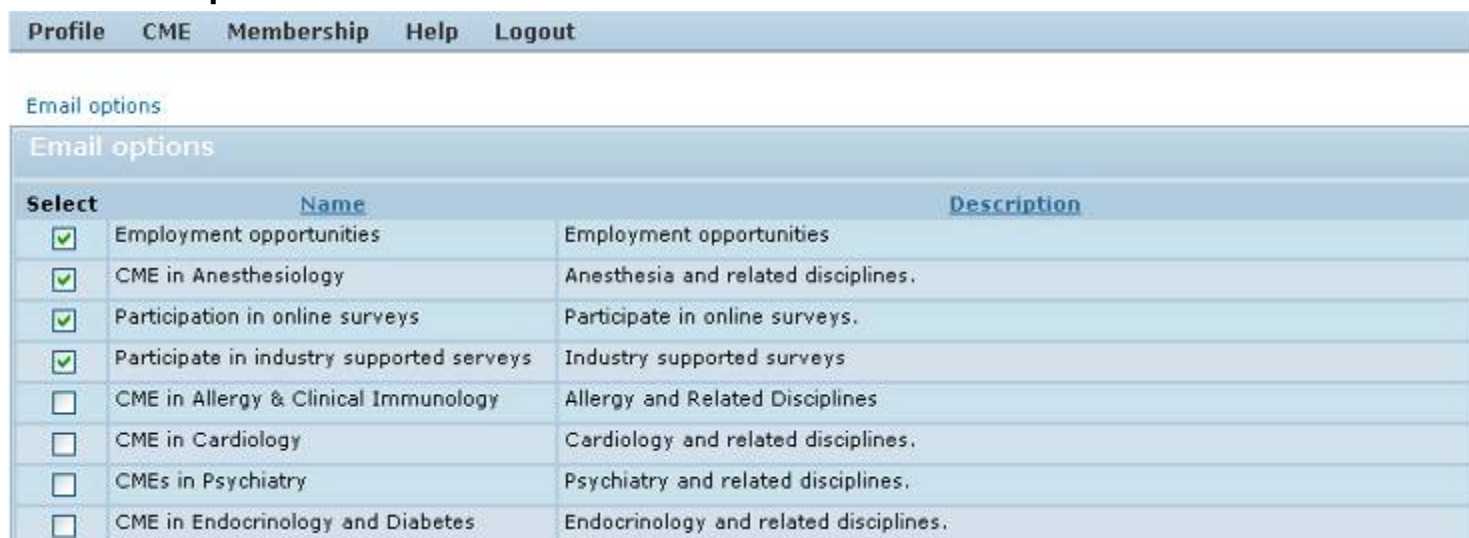
Show current year

1. Shows CMEs by year.
2. Shows all attended CMEs for the year.
3. Shows total number of credits earned for the year.
4. Allows the individual CME certificates to be viewed and printed.

Profile

Allows members to change their password and update their personal information. An extremely important function under profile is the submenu “Email options” (see below).

Email options



Select	Name	Description
<input checked="" type="checkbox"/>	Employment opportunities	Employment opportunities
<input checked="" type="checkbox"/>	CME in Anesthesiology	Anesthesia and related disciplines.
<input checked="" type="checkbox"/>	Participation in online surveys	Participate in online surveys.
<input checked="" type="checkbox"/>	Participate in industry supported surveys	Industry supported surveys
<input type="checkbox"/>	CME in Allergy & Clinical Immunology	Allergy and Related Disciplines
<input type="checkbox"/>	CME in Cardiology	Cardiology and related disciplines.
<input type="checkbox"/>	CMEs in Psychiatry	Psychiatry and related disciplines.
<input type="checkbox"/>	CME in Endocrinology and Diabetes	Endocrinology and related disciplines.

All email options are controlled by the member except the emails coming from the department administrators. To stop receiving emails from your department you need to ask to be removed from the list.

The email options allow you to control the nature of the communications that you will receive. For example, if you select the option “Employment opportunity”, institutions that are announcing a vacancy in a certain field will be able to send an email to all members who have indicated that they are want to receive such offers. The institution sending the email will not have access to your email address! (See video tutorial).

You can also determine other criteria for your emails, for example announcements in the field of Cardiology or another sub-specialty.

Membership

Shows all departments/institutions with which the member is associated.

Please review the video tutorials on the web under “Help” on the home page.

For questions/comments send your emails to: feedback@nevikor.com

The Nevikor Corporation