

## Glossary of CPD Application Portal Terms

**Active** – this status on the planner and presenter tab indicates that the person in question has a current disclosure on file and either has nothing to disclose, or has reported disclosures and a reviewer form has been completed and uploaded to the portal.

**Activity** – Any CPD accredited continuing education event – annual conferences, tumor boards, grand rounds, lectures, workshops, etc.

**Administrative Contact** – The person named in the portal as the contact for that activity.

**Commercial Interest** - Any entity producing, marketing, re-selling, or distributing health care goods or services consumed by, or used on, patients.

**Course** – a standalone CPD activity – annual conferences, lectures, one-time events

**CPD** – Continuing Professional Development

**Disclosure form** – The form that must be completed by all planners and presenters for a CPD activity

**Disclosure to audience** – A list of the planners, presenters, moderators, and instructors, with their financial disclosures or lack thereof listed.

**Disclosures Reported** – This indicates that the person in question has something to disclose, a reviewer form is necessary.

**Expired** – This indicates that the disclosure on file for the individual has expired. A new disclosure form must be completed.

**Ineligible** – This indicates that the person added to the activity is an employee of a commercial interest and therefore is not allowed to control any aspect of a CPD activity

**Jellybean** – Red, yellow, and green. These are found throughout the portal and indicate what state that particular session, widget, or tab is in. Action required, pending, and good to go.

**Orange Question Mark Button** – This is an indication that something needs to be uploaded. To do so, click on the orange question mark. The exception are reviewer forms, which show an orange question mark button that only CPD can upload a document to.

**Pending** – This indicates that the person added to the portal has not completed a disclosure form. They and the administrative contact will be emailed the link to the form automatically.

**Planner** – A person involved in the planning of the CPD activity, generally part of a formal or informal committee. There must be two planners on a planning committee and at least one of them must have nothing to disclose.

**Plus Sign** – this appears in many of the widgets in the portal in the upper right of each widget. When this is visible, you can add items to that widget, whether it be a document, or a person's name, or a block of text.

**Presenter** – Any person who will present, moderate, instruct, or demonstrate, at a CPD activity

**Reviewer form** – A form completed by a member of the activity's planning committee, generally the program chair. This person must have nothing to disclose.

**RSS/Regularly Schedule Series** – Any regularly scheduled series including grand rounds, tumor boards, lecture series, morbidity and mortality conferences, tumor boards, case conferences, etc.

**Tab** – In the portal there are a series of tabs

- On the dashboard tabs are: course or regularly scheduled series
- In a course the tabs are: basic, educational structure, planners & presenters, grants (if applicable) precourse, postcourse, documents
- In an RSS the tabs are: basic, educational structure, planners & presenters, grants (if applicable) quarterly, documents

**Widget** – On each tab of the portal there are widgets, each standalone element – such as where to upload the publicity are widgets.

The screenshot shows the 'rshboard' portal interface. At the top, there is a navigation bar with several tabs: 'Basic', 'Educational Structure', 'Planners & Presenters', 'Quarterly', 'Documents', and 'Activity Details'. Each tab is labeled with a red arrow pointing to it, and the word 'TAB' is written in red above each arrow. Below the tabs, the 'Basic' tab is selected, showing a 'Basic Details' widget. A large red arrow points to this widget, and the word 'WIDGET' is written in red above it. The 'Basic Details' widget contains a table with the following information:

Activity Details	
Activity Title:	Adult ECMO M&M
Sponsoring Department:	Adult ECLS/ECMO
For Academic Year (July-June):	2020
Activity Type:	Regularly Scheduled Series - Regularly Scheduled Session (RSS) (2)
Tell us about your Activity in your own words:	Extracorporeal membrane oxygenation (ECMO), also known as extracorporeal life