

This tutorial acquaints the user with the following procedures: Enter Event with Topic and Speaker, Register People for an Event, Print registration report for your files.

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## **BASIC DATA ENTRY**

First, open up the CME Tracker program, click on the EVENTS tab, and using your User's Guide, identify the tools that are described in the second section. Familiarizing yourself with the screen will be valuable to you as you begin using the program. In this initial "tour", don't enter any data, simply click on the items and read about them as they are described in the Tools Area.

Secondly, you might like to move through the Tabs as they are described and become comfortable with each screen, noticing the types of data you will enter when you begin. There is a "Test" Person, Event, Registration, Facility, and Supporters already entered so that you can browse without entering any data.

Now that you are somewhat familiar with the screens and are familiar with the tools that are available to you for data entry and navigation, you are ready to begin entering data.

3 major areas are indicated by the tabs at the top of the "notebook" and each area is divided into associated "subtabs" at the bottom of each page. At this point, you may have gathered some paperwork and are prepared to enter a "real" event and register some people. Rather than begin with an actual event, Let's start by entering a tutorial event. You may then refer to this tutorial and to that event as questions arise.

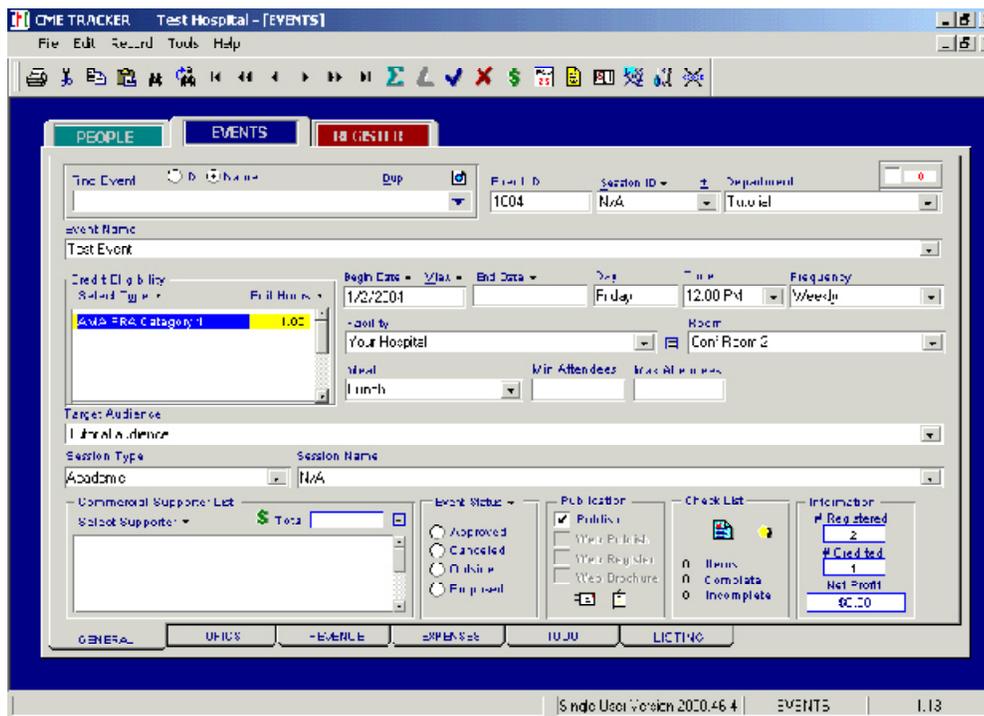
The information for the tutorial event follows:

This event is a weekly Series type activity called "Tutorial Event"  
It takes place on Friday at noon. (Lunch is served)  
The event is sponsored by the "Tutorial" Department  
It is eligible for 1 Category I Credit.  
There are no commercial Supporters  
"Test Speaker" is the speaker  
2 people are attending: Test Person & Person Tutorial

To Enter the Tutorial Event:

Press the **EVENTS** tab

You will be viewing the first event in your database (Test Event)



Press the **(+)** button in the find event box.

Your event will be issued an ID

Press enter out of the Event ID field

Upon entering the Session ID field, the drop-down edit field will drop, allowing you to view the current options for Session ID.

A session is defined by you. It may be a breakout session in a large event. It may be that you choose to break a three day meeting into 3 "sessions". The criteria for a session is that you will register people for a session. Therefore, if you are registering a group of people for this meeting and they are all expected to attend the entire meeting, you will only have one session. You may choose to select N/A if you are not having more than one session.

Type an "N" to move the highlight in the drop-down list to N/A and press Enter

Your cursor will move to the DEPARTMENT FIELD. Upon entering the department field, the drop-down edit field will drop, allowing you to view the departments in that list. Since this event is sponsored by the TUTORIAL department, simply begin typing the word Tutorial and you will see that it is not located in the drop-down.

To Add the Tutorial Department to the Drop Down hold down the ALT KEY on your keyboard and Press the INSERT key.

The Add Item dialog box will pop up, with the question "Would you like to add 'Tutorial' to Department drop-down list?" Notice the Yes button is highlighted. You may press Enter to select yes. Also notice that the "Y" in Yes is underlined and the "N" in No is underlined. You may also Type a Y to make this selection. Lastly, if you prefer to use a mouse, you may click on the Yes Button.

Once you have chosen to add the Tutorial Department, you will see that "Tutorial" is now on your drop-down list. Press Enter to select "Tutorial"

and move to the EVENTNAME field

Upon entering the Event Name field, the drop down will drop, allowing you to select an event name. You will add a new event to the list by typing in TUTORIAL EVENT and pressing ALT-INSERT and confirming that you wish to add.

Enter to the CREDIT ELIGIBILITY box.

Click on the "Select Type" selection button to select "AMA PRA Category 1" and the "hours" list will pop up for you to select the number of credits.

Click on 1.00 to select.

You can select multiple credit types and hours here by repeating the above step followed by this one.

Press Enter to or Click on Begin Date to proceed to the DATES field.

There are two fields available for DATES. If your event is a single-day event, you may type in only the beginning date. If your event is a multi-day event, you may wish to type in the beginning date and an end date in the

second date field. You can enter the date in 01/02/04 format, or if you prefer, in 1/2/04 or 1-2-04 or 01-02-04. In all cases the year will be converted to a 4 digit year for Year 2000 compatibility.

**Type the DATE 1/ 2/ 2004 and Press Enter once your date is typed. Notice that the DAY field automatically filled in with the correct day, Friday.**

**Press ENTER out of the second DATE field**

**Upon entering the TIME field the drop down edit will drop, allowing you to select the time (12:00 pm). To select the time, begin typing 12:0 and you will see that the highlight moves to 12:00 PM.**

**Press Enter to select 12:00 PM**

**Upon entering the FREQUENCY field, you will notice that "Weekly" is already highlighted. "Weekly" has been set as the default as described in the tools section of the User's Guide.**

**Press Enter to Select Weekly.**

**In the Facility Field, Select "Your Hospital" and Press Enter to select. In the Room field, you will select Conf Room 2, by pressing the down arrow on your keyboard to move the highlight down one item.**

**Press ENTER to select Conf Room 2.**

**Your cursor will move to the MEAL field**

**You will NOT be entering anything in the Min and Max Attendees fields these fields are generally used to fit into a specific conference room or if you would cancel an event if enough people did not register.**

**Press ENTER to select "Lunch".**

**In the TARGET AUDIENCE field you will type in "Tutorial Audience" and press the ALT-INSERT to insert this item into your list.**

**Upon entering the SESSION TYPE field, the drop-down edit field will drop, allowing you to view the current options for Session Type.**

**Type an A to locate "Academic" and Press ENTER to select it. When you have moved to the Session Name field, you can press enter to select "N/A".**

**Since you do not have Commercial Support, you can bypass this field.**

**Note that all of the data you have entered is saved as you type it.**

**Click on the TOPICS tab at the bottom of your screen to move to the topics area.**

**Upon entering the Topics tab, you will notice that the DATE field is highlighted in the smaller notebook at the right. Since you have entered a date for the event on the prior tab (general), you may press ENTER to accept that date. This area is intended to build an agenda for your meeting. Whether you have one topic or many, you will type the topic in the editing area of your screen and it will be added to the list on the left as you press enter to accept the data.**

**Since this meeting has two topics and the first begins at 12:00 pm, type 12:0 to locate 12:00 pm in the BEGIN TIME list. Press ENTER to accept 12:00 PM.**

**upon entering the END TIME field, type 1:0 to locate 1:00 PM.**

**Press Enter to select 1:00 PM.**

**Your blinking cursor will be in the Topics field.**

**Type in the topic "Case Presentations" and press enter to accept.**

**Upon entering the Speaker field, the drop-down will drop for you to select a speaker. You will notice that only one speaker is currently on the list. (Test Speaker). Select the Test Speaker**

**The source for the speaker drop-down list is the PEOPLE tab.**

**If you begin typing in a person not in that list, a "popup" will allow you to "Quick Add" this speaker.**

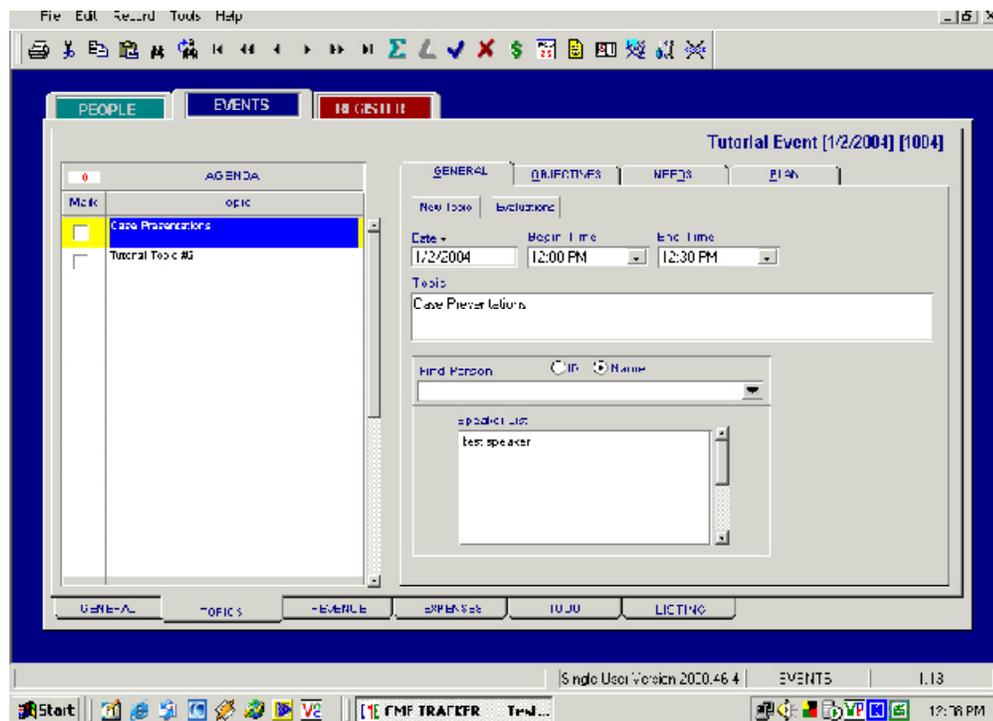
**Notice that your topic item is complete in the list on the left. To add a second item Click the NEW TOPIC button in the upper left of the tab.**

**The date will be highlighted. To accept the date from the prior screen, press enter. Type in 1:0 to locate 1:00 PM and ENTER. Type in 1:3 to locate 1:30 PM and press ENTER. Type in the Topic "Tutorial Topic # 2" and ENTER. Lastly, select the Test Speaker and press enter.**

Notice that the list on the left has shifted to show your second topic at the top. Each topic will be in the top line as you are working with it for easy location. After the item is complete, the list will be re-ordered to put the items in order by date and begin time for a final agenda.

To move the list up and see both items, click on the up arrow on the scroll bar at the right.

Now you will see both items on your agenda.



**Click on the OBJECTIVES tab to enter Objectives.**

**The objective for this event is: Physicians who participate in this meeting will learn new procedures and be much smarter.**

**Type the Objective in the Objective area in paragraph form. This is the Objective that will appear on your notices and letters.**

**Click on the NEEDS tab to enter Needs Assessment Information.**

**Under the area that says "How were needs identified?", you will compile a list by selecting the following items:**

**Hospital Information Sources  
Health Stats  
Recommendation of Committee**

**Notice that each item has a bullet in front of it. You select a different bullet style simply by clicking on the drop-down next to the "list" checkbox and choosing a bullet. You can add new bullet styles by typing in a character and pressing enter.**

**Click on the PLAN tab to enter further planning information.**

**Under Instructional Method, select "Lecture", Method of Eval, select "Evaluation Form", under AV materials select "Computer Generated Slides" and under Instructional Methods select "Monograph".**

**Lastly, compile a list in the publicity area. First, change the bullet to a different style. Second, Select the following items:**

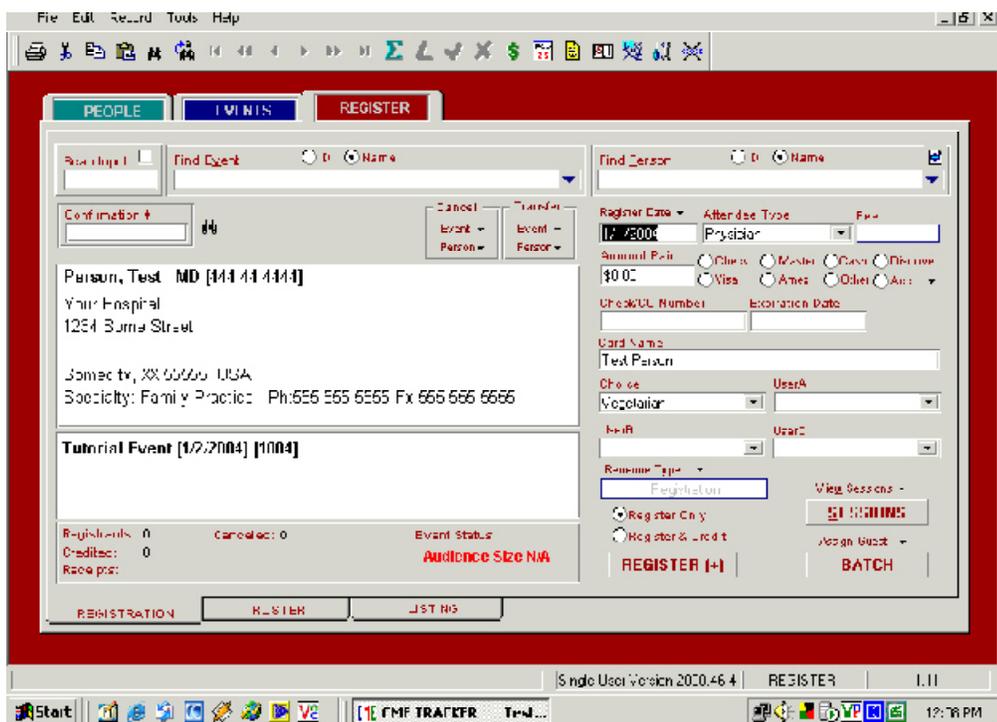
**Brochure  
Calendar  
Flyer**

**This describes your publicity for the event/topic.**

**At this point you are through with the basic event planning. This event has no budget or actual expenses or revenues but you may want to glance at these tabs.**

## Registering People for an Event

To begin registering people for your event, click on the register tab  
Upon entering the Registration area you will be viewing the registration subtab.  
Notice that there are two large windows on the left hand area of  
your screen that contain the name of the "active" person (last person selected)  
and the "active" event. (last event selected). If the event window  
shows the "Tutorial Event" that you just created, you are ready to begin  
registering people for that event.



If the event window does not show the tutorial event, click on the down arrow in the FIND EVENT drop-down to find the event.  
You can find the event by name or number by selecting the "Name" and "Number" fields in the FIND EVENT box. Click in the NAME field. After dropping down the list, begin typing TUTORIAL to locate the "Tutorial Event". Press ENTER to select the Tutorial Event. The Event Window in the lower-left side should now show the Tutorial Event, it's date, number, time, facility and room. You should only begin registering people for an event AFTER confirming you are registering them for the correct event.

**Now you will begin to find the people to register.**

**The first person will be TEST PERSON. Click on the FIND PERSON drop down box and the list will drop down for your selection. Begin typing PERSON and the test person will be located. Press enter to select the TEST PERSON.**

**Your cursor will move to the REGISTER DATE field.**

**Today's date will be automatically entered in the Date Paid field. This date is the date that the person was registered or paid.**

**Press the + key on your numeric keypad to register this person**

**Since you will not be accepting payment for this registration, you are ready to register the person. Pressing the + key on your numeric keypad is the same as pressing the REGISTER button in the lower-right hand side of your screen. You may also press ALT-G to register the person if you prefer.**

**Once you have pressed the + key on your NUMERIC KEYPAD, the 2 boxes on the left containing the "active" person and "active" event will be gray.**

**The word "Registered" will come up above the person box in red.**

**This establishes that this person has, in fact been registered for the event.**

**Note that the number of registrants in the lower left hand corner will increase by one. The number of Credits in the lower left hand corner will remain the same.**

**You have registered the person for the event.**

**Also, the FIND PERSON drop down will drop for you to locate the next person.**

The next person you will register is PERSON TUTORIAL.  
Begin typing TUTORIAL to locate PERSON TUTORIAL on the list. (you will always begin typing the last name first.) After typing TUTORIAL, you will notice that this person is not located on the list. This means that this person is not yet in your PEOPLE database.

Press ENTER to ADD this person.  
The NEW PERSON dialog will come up for you to add the person to your PEOPLE data base. There will be an ID in the Person ID field. With your mouse, click on the FIRST NAME field and type in the first name "Person".

Press ENTER to move to the LAST NAME field  
this field should already have the last name TUTORIAL that you typed on the previous screen.

Press ENTER to move to the TITLE field.  
Type an M to locate MD on the list and press ENTER to select MD.

If you would like to enter additional information at this point you can.  
When you've completed your entries, you can press the QUICK ADD button.

You will return to the Registration tab.

Since this process adds the person to the people database but does not register this person, confirm that the PEOPLE WINDOW contains the information for Tutorial, Person.

Click in the DATE REGISTERED field and press enter to accept today's date.

Press the + key on your numeric keypad to register this person.

The Find Person drop down will drop to locate additional people. Since you will not be registering any additional people, simply press enter to close the list.

Now you should take a moment to look closer at the register screen to understand all of the elements for future registrations.

#### **REGISTRATION TAB**

As you have already learned, you can locate an event and a person by using the FIND EVENT and FIND PERSON drop down lists. Upon locating an event and a person, you can register the person by pressing the register button, typing a + key from your NUMERIC KEYPAD or typing ALT-G.

Right above the Register button there are 2 selections - Register Only and Register & Credit

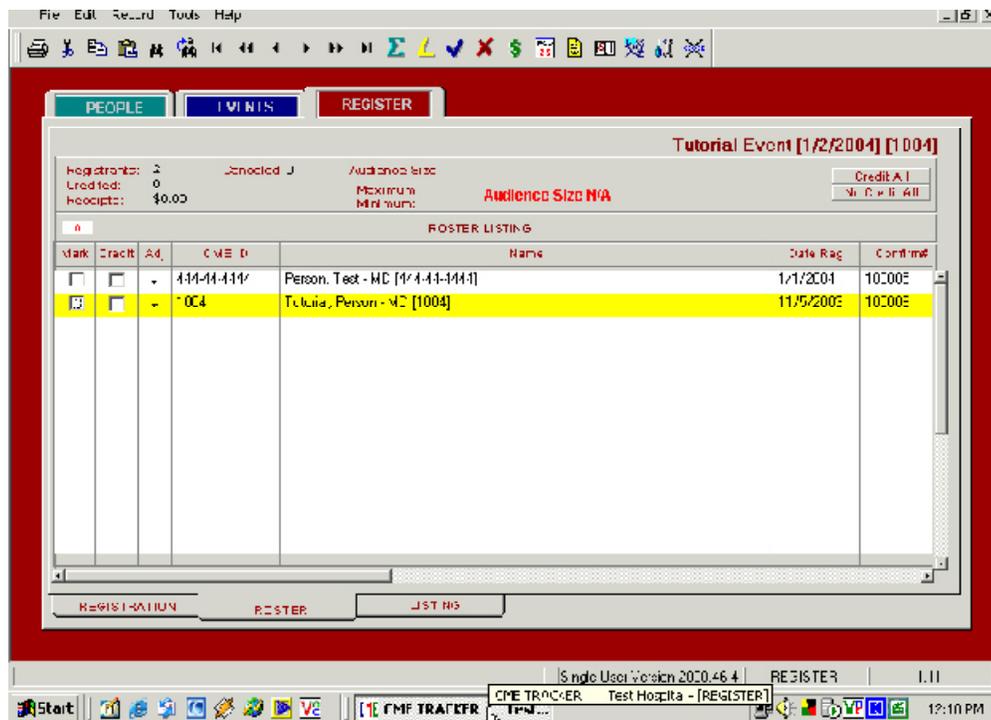
If REGISTER ONLY is selected, you are doing a Pre-registration (no credit is being applied to the registration). If REGISTER & CREDIT is selected you are applying credit while registering registration. Feel free to register people by either the Register Only or Register & Credit methods. If you use Register Only, you will post credit for this person after the event has taken place and his or her attendance is recorded.

For this tutorial you have pre-registered people and not given credit.

Also in this tutorial you are not recording any dollar amounts collected. Note that you can put in a dollar amount in the amount field and select the method of payment. You can also record credit card or check information.

The REVENUE TYPE field remains "grayed-out" unless you put a dollar amount in the AMOUNT field. Once activated, this field is your opportunity to select which revenue type you would like to apply to this registration fee.

Now that you have registered 2 people for the Tutorial Event, click on the ROSTER tab at the bottom of the page to view your registration roster.



Note that the total number of registrants appears at the top of the page.

Note also that any dollar amounts or minimum/maximum attendees are calculated at the top of this roster tab.

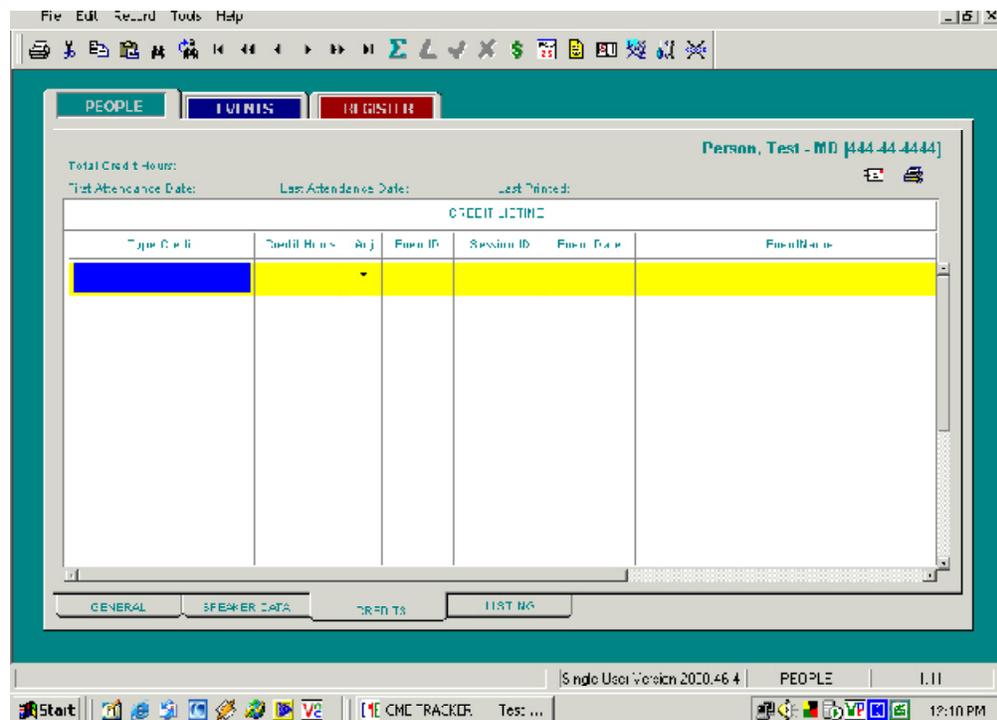
Click on Person, Test to highlight this person

The following steps will show you the process and give you an opportunity to confirm that you have issued credit to a person.

Click on the PEOPLE tab to view the Test Person's records.

Click on the CREDITS sub-tab below to view the Test Person's credits earned to date.

**Note that there are currently no credits on this person's summary.**



CME Tracker keeps track of the "active" event.

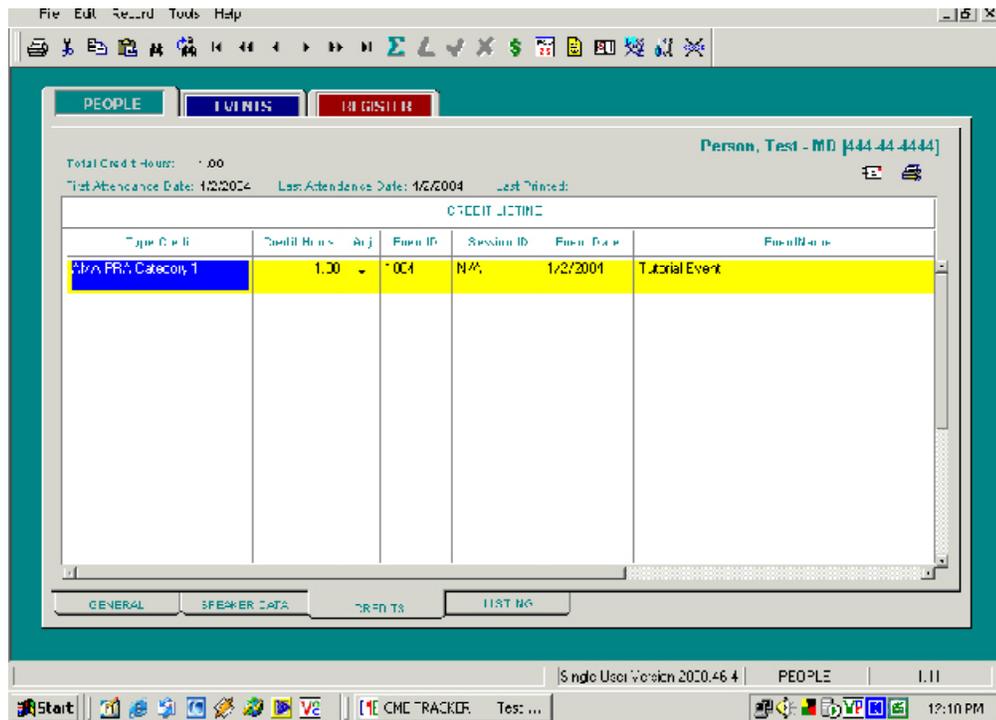
Click on the REGISTER tab on the top of the page.

Click on the ROSTER tab at the bottom of the page to return to your registration roster.

To apply credit to PERSON TEST, click once in the credit box to the left of Person, Test's name. A checkmark will fill the box and credit is applied. Click on the name for Person, Test to highlight in yellow and select this person as the active person.

If you wish to see that the credit has been applied, click on the PEOPLE tab at the top of the page (verify you are viewing PERSON TEST).

Then click on the CREDIT tab at the bottom of the page. You will then be viewing PERSON TEST's Credit summary and should see the credit for Tutorial Event and the Test Event.



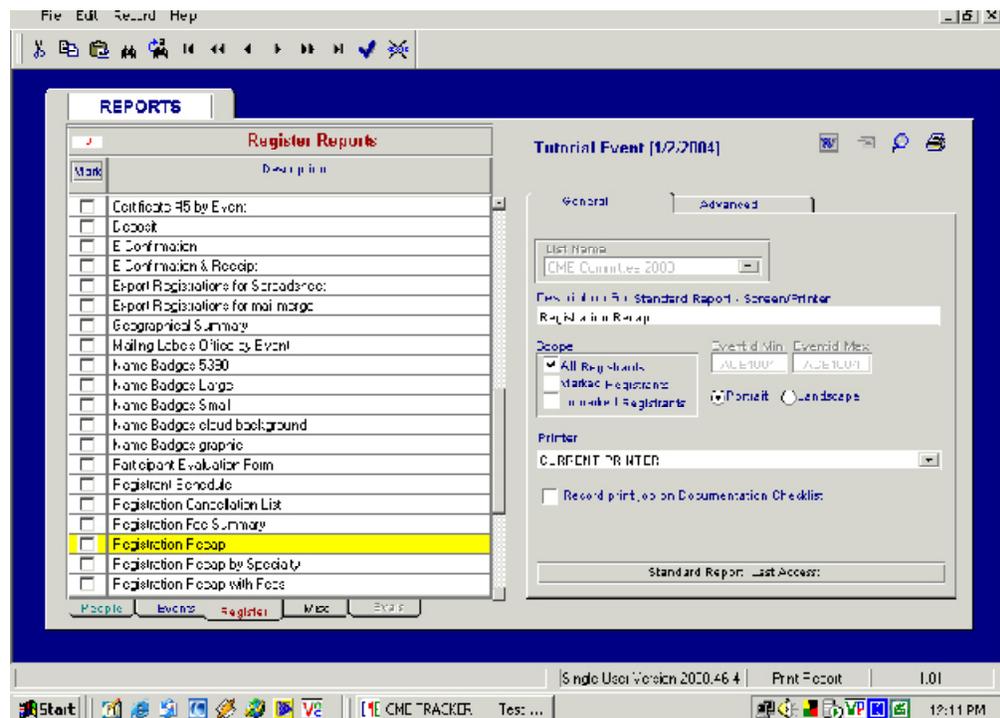
Click on the REGISTER tab to move back to the register area.

Click on the ROSTER tab to move back to the roster.

Next, you will be printing some registration reports.

Click on the printer icon in the upper-left side of the page.  
The print Listing will come up in the registration reports area.

Using the scroll bar, scroll to the report REGISTRATION RECAP.  
All reports are in alphabetical order.



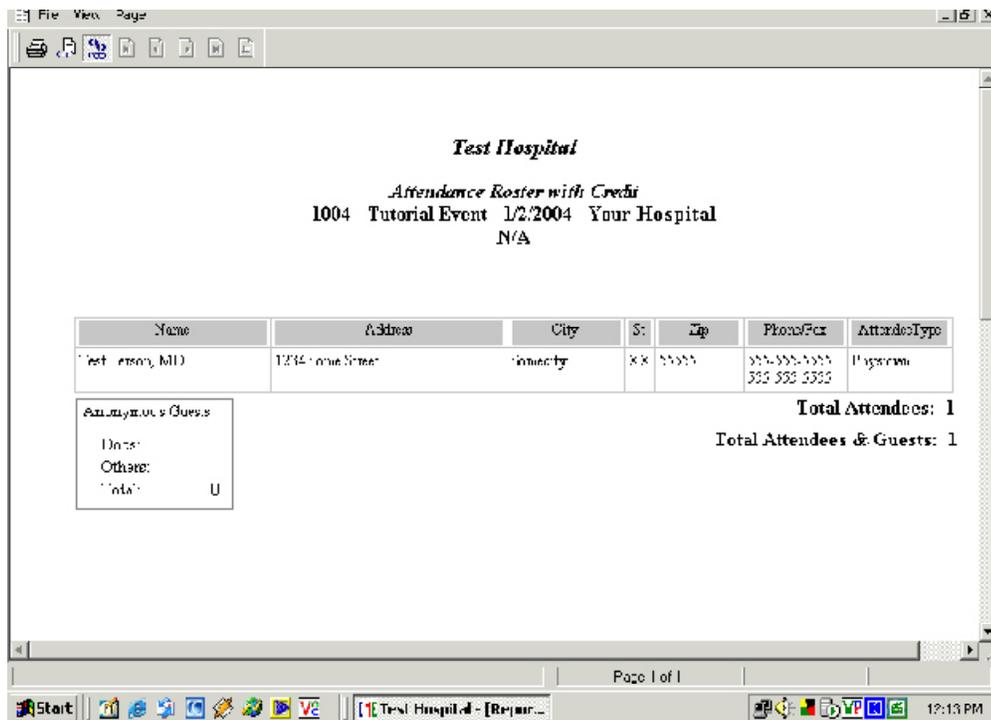
Click once on REGISTRATION RECAP  
The report will be highlighted and the report information will be in the  
edit area above the listing.

Click on the PRINT Button in the upper-right hand corner of the tab.

After printing the "registration recap", move to the top of the print listing with the scroll bar at the right.

Click on the report "Attendance Roster w/ Credit" to select it.

Press the MAGNIFYING GLASS button on the upper right hand side to print the report to the screen.



Notice that only TEST PERSON, MD is listed. The attendance roster only lists people who have attended the event and have been given credit.

To close the report, click on the bottom small X in the upper right hand corner.

**At this time, you can select any one of the Register reports to print to the screen by:**

**clicking on the report to highlight it**

**You may print any of the Register reports to the printer by:**

**clicking on the report to highlight it**

**clicking on the PRINT button on the upper right hand corner of the tab.**

**Once you have printed some reports, close the print listing by clicking on the bottom small X in the upper right hand corner.**

**Upon the completion of this "Getting Started" Tutorial you have learned the following:**

**How to enter an event**

**Adding to Drop-down edits**

**Typing in multiple topics**

**Registering attendees for the event**

**Register using the keyboard only for quicker registration**

**Add people using the "Quick Add" tool**

**Giving people credit that have been pre-registered**

**Confirming that credit has been assigned.**

**Printing Reports**

**Printing reports to the screen**

**Printing reports to the printer**

**Selecting the Current Event for printing**