

## Guide to Online Handout, Evaluation, and Certificate System

**In Four Parts:** Overview of System, Staff Use, Customer Use, and Implementation Steps

### Overview: How the System Operates

The evaluation/certificate/handouts system is driven by staff setup of an Event in CASCE and, subsequently, by SR-AHEC customer login to the MyCE page at <http://www.aheconnect.com/ncahec/myce.aspx?a=8>. The MyCE page displays only data related to a person currently logged in. Data changes made in CASCE transfer immediately to information displayed on MyCE.

**Making Resources Available for Customer Access.** When a registrant logs in with his/her last name, last four digits of SS#, and Zip code, the evaluation system attempts to match the login information to a person record in CASCE. If a match is made, the system locates all of that person's SR-AHEC registrations for Events that meet the following four requirements:

1. Registrations are displayed only for Events whose structure in CASCE is *Workshop* or *Conference*. (No restrictions are based on event\_type: *public*, *contracted*, etc. All Event types will display.)
2. Registrations are displayed for Events whose event\_status data field contains *Open*, *Filled*, *Planning*, *Closed*, or *Waiting List Only* -- anything except *canceled*.
3. The registrant's status for an Event must be *Attended*.
4. The **OLC\_Ready?** data field for an Event must be set to *Yes* in order for an evaluation, certificate, and resources (handouts) to appear on a registrant's MyCE page. (The default setting is *No*.)

If all these conditions are met, a registrant can have access to an evaluation, certificate, and resources (handouts) for an Event, subject to these three conditions:

1. Handouts must be made available on SR-AHEC's Internet server in the expected folder structure (i.e., file path) and contained in a folder named the CASCE Event number.
2. An evaluation will be displayed 24 hours after the CASCE event\_end\_ts.
3. After a registrant completes the evaluation, the certificate is displayed. The certificate will display only credits currently applied (in CASCE ) to the registrant for the event.

Please see the subsequent section, *Description of SR-AHEC Staff Use*, for complete instructions.

**Display of Resources: Evaluation, Certificate, Handouts.** If all the previously described requirements are met, the MyCE page displays an *Evaluation* link under the Event name and Event end date. If a person is registered for an Event that has not already occurred, the Event is listed and any available handouts will appear, but no *Evaluation* link is displayed until 24 hours after the CASCE event\_end\_ts. A resources (handouts) link will be displayed for past *and* future Events, until they are removed from the Internet server.

## Guide to Online Handout, Evaluation, and Certificate System

**In Four Parts:** Overview of System, Staff Use, Customer Use, and Implementation Steps



Affiliated with Duke University Medical Center  
and part of the NC AHEC Program

Welcome to the Southern Regional AHEC workshop and conference resource area.

After you sign in, you will be able to access classroom program evaluations, handouts (if available) and event certificates.

Please enter the following information to access your event resources:

Last Name:  Last 4 Digits SS Number:  Home or Office Zip Code:

Miriam Jones

Event Name	End Date
Intensive Outpatient Treatment of Substance Abuse - TDC	01/06/2012 <a href="#">Evaluation</a>

When a registrant clicks on the *Evaluation* link for an Event, an evaluation form for that Event displays. After the registrant completes the evaluation form and submits it, the certificate will automatically display for download or printing. Instructions appear on the footer of the certificate.

The following rules apply to credits on the certificate:

- Only credits applied to a person for a CASCE Session will display on the certificate.
- The program lists on the bottom of the certificate ALL sessions a person attended and the associated credits.

After an evaluation for an Event has been submitted, that *Evaluation* link will no longer display. Rather, only the *Certificate* link will display. A registrant may return to MyCE and print certificates from past Events.

If a registrant clicks on the Event name, the online registration Event description for that Event will display as a helpful reminder.

**Referral to the System.** Registrants can access the MyCE page by using a link transmitted to them or by clicking a MyCE link on SR-AHEC's website (on the main CE page).

When scanned by a smart phone, the QR code shown here should browse to our MyCE page. Please test before using. The file is available as a .png image.



## Guide to Online Handout, Evaluation, and Certificate System

**In Four Parts:** Overview of System, Staff Use, Customer Use, and Implementation Steps

### Description of SR-AHEC Staff Use

1. Set up a CASCE Event and enter complete and exact information.
2. Set Event structure to *conference*, *workshop*, or *series*. The system will not work for other Event structures.
3. Set Event status to anything except *anceled*.
4. Now set the following CASCE data fields that *directly affect* information displayed on evaluations and certificates. After setting these fields, use the administrative page (at <http://www.aheconnect.com>. **Get complete URL from supervisor.**) to view events using the system and verify that all information displays correctly! *Do not share the administrative URL with presenters or others outside the Staff!* Also check the appearance of the Event information on the online registration site (at <http://www.aheconnect.com/ncahec/findevents.aspx?a=8> ).
  - a. Event page: event\_name
  - b. Event page: event\_start\_ts, event\_end\_ts. The system references these fields to determine when to display evaluations, and certificates on MyCE.
  - c. Event page: olc\_ready?: Default setting is *No, preventing* online handouts, evaluation, and certificate from being displayed on MyCE. To *enable* an Event to use the online system, change this setting to *Yes*.
  - d. Event page: objectives: Appear on the evaluation.
  - e. Event page: Contact\_Person: If this field is not empty, the system looks in the expected SR-AHEC Internet server directory structure for an electronic signature file for the Contact\_Person. Electronic signature files on the server must be named by the following convention with *no spaces: last name, first initial, file extension*. The file extension must be .jpg or .png. (Example: jonesb.jpg) Attempt not to exceed an image size of 150 pixels wide by 50 pixels high at 72 pixels per inch. If an appropriate file is available, this person's signature will appear on the certificate under *Event Coordinator*.
  - f. Session page: session\_begin\_ts, session\_end\_ts: Start date and time display with each presentation/presenter on an evaluation and with the credit on a certificate.
  - g. Session page: session\_name: Appears on a certificate with the Credit.
  - h. Session page: presentation\_title: Appears on an evaluation form.
  - i. Session page: presentation\_begin\_ts: Appears on an evaluation form.
  - j. Session page: Presenter: Appears on an evaluation form.
  - k. Session page: Location: Appears on a certificate with the Credit.
  - l. Session page: credit\_name: **ONLY applied credits will display/print on a certificate.**
  - m. Session page: credit\_hours: Appears on a certificate.

## Guide to Online Handout, Evaluation, and Certificate System

### In Four Parts: Overview of System, Staff Use, Customer Use, and Implementation Steps

- n. Session page: accreditation\_statement. If available, this statement appears on a certificate. Some credits, such as Pharmacy, require special accreditation statements. Here is how to access accreditation\_statement. On a Session page, beside Fee/Credit, click Edit. In the window that displays, click "Set to Credit's Generic Accreditation Statement." An editable statement populates the field. Edit as needed and click Save Edit.

To cause an image to print on a certificate beside an associated credit, add HTML language to the accreditation\_statement data field, *using only single quotes*.

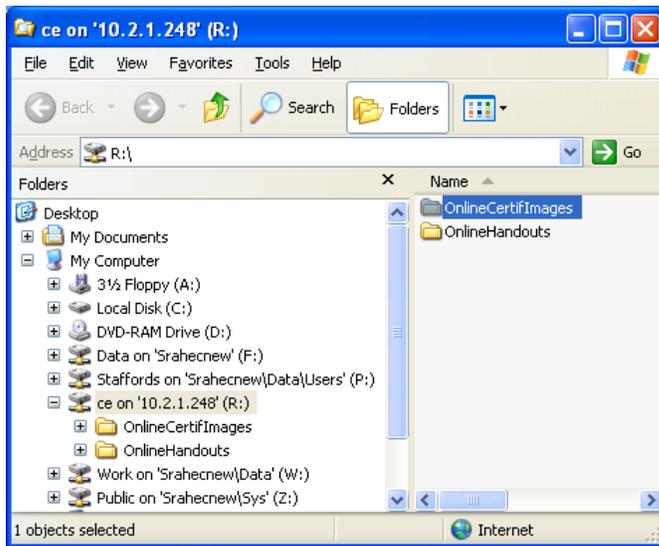
(Example: <br><img src='http://www.southernregionalahec.org/ce/OnlineCertifImages/ArialImages/ArialHeaderGraphic.jpg' style='float:left' hspace='10'>The Worldwide School of Webmasters is accredited by the Accreditation Group for Webmaster Education as a provider of continuing webmaster education. This program (0046-222-11-074-XXX-P) will provide 3.0 hours of CE credit. No partial credit will be given. <br><br>)

The image itself (in the example, AGWE\_logo.jpg ) must be mounted on an Internet server in the location described by the URL entered in the accreditation\_statement data field. The image name must not contain any spaces and the file extension must be .jpg or .png. Attempt not to exceed an image size of 150 pixels by 150 pixels at 72 pixels per inch.

- o. The system also references the following CASCE fields to log a customer into MyCE and determine what to display for him/her:
    1. person\_id
    2. firstname
    3. lastname
    4. home\_zip
    5. registration\_status
    6. event\_structure
5. Each SR-AHEC staff member who will load handouts or images to folders on the Internet server must have IT staff map the R-drive on their PC. The R-drive (for Resources) will appear as any other network drive and will contain two folders: *OnlineCertifImages* and *OnlineHandouts*.

## Guide to Online Handout, Evaluation, and Certificate System

**In Four Parts:** Overview of System, Staff Use, Customer Use, and Implementation Steps



6. Staff will prepare resource files and load to the R-drive. The MyCE page will immediately display handouts that are located on the expected path. If no folder is created for handouts for an Event, no resource link for handouts will display on MyCE.
  - a. When naming handout files, do not use spaces or special characters (@, &)!
  - b. Expected file types are Microsoft Office files and .pdf files.
  - c. Place handouts in a folder named the CASCE Event number (e.g., 35855) and place that folder in the *OnlineHandouts* folder on the network R-drive.
  - d. Example: The files for Event 35855 will then be located at:  
R:\\OnlineHandouts\\35855.
  - e. Place signature images and logos (.jpg or .png) for certificates in the folder *OnlineCertifImages*.
  - f. In html, use the following URL to refer to an image, replacing **exampleFileName.jpg** with the name of your image:  
<http://www.southernregionalahec.org/ce/OnlineCertifImages/exampleFileName.jpg>
7. The system expects that credits are applied to registrants at the time the registration is processed. If the system is used for an Event, MyCE is subject to displaying an evaluation and certificate for the Event after the Event *end time* and the *administrative lag time* (24 hours after the Event end time) have passed. *To withhold the evaluation/certificate from a no-show registrant or registrant who has not paid, you can un-apply credits or remove the registration—actions that are subject to the approval of AHEC administrators.*
8. If for some reason the `olc_ready?` data field for an Event was set to *No* for an additional period of time *after* the administrative time lag and is subsequently reset to *Yes*, then any resources (handouts, evaluation, certificate) will immediately display if all other system requirements were met.

## **Guide to Online Handout, Evaluation, and Certificate System**

**In Four Parts:** Overview of System, Staff Use, Customer Use, and Implementation Steps

9. If the system is used with an Event, confirmation emails or letters should include a link to the MyCE page or give instructions for accessing the MyCE link on the main CE page of SR-AHEC's website at the appropriate time. Instructions may include how to log in, submit evaluations, and claim a certificate.
10. On an administrative page at <http://www.aheconnect.com/>..... (see supervisor for URL), SR-AHEC staff can view a list of events accessible by the system and preview the evaluations, certificates, and handouts. Do not share this URL with presenters or others outside the Staff!
11. On the administrative page, SR-AHEC CE staff can track evaluation results. To shorten search time and lighten server load, filter the list of events to only those of interest. Check the box "Show Eval Results" at the top of the page and click the Filter button. A cumulative score displays for an event in the Score column. Click a score to see its summary details. On the details page, check the box beside Show Comments and click the Refresh button. A list of all responses to open-text questions will display below the evaluation summary.

To view other summaries, click the link "Cumulative Survey Results" at the bottom left of the page. The Cumulative Survey Analysis page displays in a new window. Use the selection boxes at the top of the page to select events and/or a time period. Click the Get Report button. If you checked the box beside "Comments," a list of all responses to open-text questions for all selected evaluations will be appended to the evaluation summary.

In the evaluation results, Likert responses are averaged; other responses are summed to indicate the number of times an item was selected in response to a yes/no or multiple choice question. Reports can be printed or data can be copied/pasted to Excel.

12. The system automatically pulls the Presenter name(s) into an evaluation, so program assistants must delete themselves as presenters in CASCE if they used this workaround to upload handouts to MyAHEC.
13. From the list of events, you can access event status and details, track registration status, view registrant details, and bulk-email event registrants.

## Guide to Online Handout, Evaluation, and Certificate System

**In Four Parts:** Overview of System, Staff Use, Customer Use, and Implementation Steps

1. In the list of events, click on the event number to view event status and details:

Name: **Big Conference**  
 Starts: 4/28/2012 9:00:00 AM  
 Ends: 4/28/2012 12:00:00 PM  
 AHEC: Southern Regional  
 Status: Open  
 Structure: workshop  
 Type: public non-contracted  
 StatewideCalendar: Internet & Intranet  
 Online Registration Available: Y  
 Online Certificate Available: Y

Registration Status	Number Registrants
Attended	43
<b>Event Profit/Loss</b>	
\$110.00	

2. View registrants and details.

<u>First</u>	<u>Last</u>	<u>Status</u>	<u>Email</u>	<u>Organization</u>
█	█	Attended	█@mindspring.com	█ Systems
█	█	Attended	█@yahoo.com	█, Inc.
█	█	Attended	█@earthlink.net	█ Medical Center

<u>RegDate</u>	<u>RegMethod</u>
4/26/2012 3:40:35 PM	Online
5/7/2012 1:51:31 PM	Brochure / Flyer
4/12/2012 12:03:22 PM	Online

## Guide to Online Handout, Evaluation, and Certificate System

**In Four Parts:** Overview of System, Staff Use, Customer Use, and Implementation Steps

3. Send one or all registrants an email. Easy access to all registrants' emails is provided.

a. Click on "Send Registrants an Email" to send to everyone in the list.

[Send Registrants an Email \(Status="Attended"\)](#)

<a href="#">First</a>	<a href="#">Last</a>	<a href="#">Status</a>	<a href="#">Email</a>	<a href="#">Organization</a>
█	█	Attended	█@mindspring.com	█ Systems
█	█	Attended	█@yahoo.com	█, Inc.

b. **An Outlook email form will open**, showing an email for each registrant in the BCC (blind copy) box and the event name in the Subject box. If Outlook is not your choice for sending mail, copy the list from the BCC box and paste it into the "BCC" box of a Gmail form. In the "To" box, put your own email address. Putting customer email addresses in the "BCC" box preserves the address privacy of everyone in the list by displaying only the recipient's name there.

**Guide to Online Handout, Evaluation, and Certificate System**  
**In Four Parts:** Overview of System, Staff Use, Customer Use, and Implementation Steps

**Description of Customer Use**

1. A customer receives notification from SR-AHEC to obtain handouts or to submit an evaluation and obtain a certificate for a completed Event. The notification contains a link (URL) to the MyCE page (<http://www.aheconnect.com/ncahec/myce.aspx?a=8>) and brief instructions for use.
2. The customer uses the link and is presented with the MyCE login screen, which is similar to the login screen for the online registration system. Successful login connects the MyCE page to the person’s CASCE record and SR-AHEC registrations.

**Greensboro AHEC MyCE Area**

Welcome to the workshop and conference resource area. After you sign in, you will be able to access classroom program resources, evaluation, and certificate resources.

Please enter the following information to access your event resources:

Last Name:  Last 4 Digits Social Security Number:  Home or Office Zip Code:

No active Greensboro AHEC Events Available

Please call our office at 336-832-8025 if you have any questions.

3. Unsuccessful login or login with no registrations detected will cause the display of this message: “No events were found for this user. For help, call 910-678-7226” (the SR-AHEC registrar’s number).
4. If CASCE SR-AHEC Event records for this customer are available (see **Making Resources Available for Customer Access** on page 1), the Event names will display on the MyCE page beside *Available Options*. Events listed will be all those for which the person *is or was* registered since February 14, 2012 (when the online system “went live”). Available options for events may include *Resources* (handouts, hotel information, instructions, etc), *Evaluation*, or *Certificate*, depending on availability.
5. *Resources* (handouts) will be available as long as they remain filed appropriately on the Internet server (R-drive). They are available for download.
6. An *Evaluation* link will display for qualifying Events if these requirements have been met:
  - a. The Event end time has passed.
  - b. The 24-hour administrative lag period after the Event end time has passed.
  - c. The person’s registration status for the Event is “attended.”

## Guide to Online Handout, Evaluation, and Certificate System

**In Four Parts:** Overview of System, Staff Use, Customer Use, and Implementation Steps

7. When an attendee clicks the *Evaluation* link for an Event, the link opens an evaluation form. When the attendee successfully submits the evaluation form, the certificate displays in a browser window, along with instructions for printing or saving the file. Example follows.

### Greensboro Area Health

acknowledges

**Belinda Ham**

has attended the follo

### Fourth Annual Moses Cone Heart and Vascular Symposium

Date: 2/25/2011 8:15:00 AM - 2/25/2011 4:30:00 PM

Location: **Moses Cone Hospital**

Credit Awarded: **6.75 CNE Contact Hours**

*Greensboro AHEC AP004-1168. Greensboro AHEC is an approved provider of continuing nursing education by the N. Center's Commission on Accreditation.*

Date: 2/25/2011 8:15:00 AM - 2/25/2011 4:30:00 PM

Location: **Moses Cone Hospital**

Credit Awarded: **0.65 CEU**

*CEUs are calculated by tenths. Example: 0.1 CEU = one contact hour of participation.*

Date: 2/25/2011 8:15:00 AM - 2/25/2011 4:30:00 PM

Location: **Moses Cone Hospital**

Credit Awarded: **6.75 Contact Hours**

Event Coordinator:

*Christopher S. Harding*

8. After an evaluation is submitted for an Event, the *Evaluation* link will disappear and only the *Certificate* link will remain. Attendees can reprint certificates for past Events.

## **Guide to Online Handout, Evaluation, and Certificate System**

**In Four Parts:** Overview of System, Staff Use, Customer Use, and Implementation Steps

### **Implementation Sequence**

1. GAHEC demonstrates the evaluation/certificate system via desktop sharing and telephone.
2. SR-AHEC CE team meets and determines how to fit its processes around use of the system.
  - a. Reviews, augments, and adopts a sequence of operations.
  - b. Elects a marketing plan to advise and instruct customers.
3. SR-AHEC requests the evaluation/certificate/handouts system “go live” date (Feb 15, 2012).
4. GAHEC provides SR-AHEC with a sample evaluation, showing the kind of questions/answers that the online system supports. The following question/answer types are supported: Likert scale (choose from a range of numbers), yes/no, single-answer (radio button selection), multiple-answer (check box selections).
5. SR-AHEC provides to GAHEC a single evaluation form to GAHEC for use in the system.
6. GAHEC provides SR-AHEC with a sample certificate from the system.
7. SR-AHEC provides their logo graphic and certificate model to GAHEC for adaptation.
8. SR-AHEC informs GAHEC of the directory structure (file path) in which handout files will be placed on SR-AHEC’s Internet server. This structure must not change. For each Event, a folder named the CASCE Event number will be placed at the bottom of the directory structure. Everything in the folder will be displayed on the MyCE page for download by the customer. Any change in the expected file path will cause handouts not to display for an Event on the MyCE page.
9. GAHEC sets up SR-AHEC evaluation and certificate.
10. SR-AHEC revises their registration confirmation letters/emails to notify the customer about the online handout/evaluation/certificate system and give the MyCE page URL. SR-AHEC provides GAHEC with a revised message for the automatic confirmation email sent by the online registration system.
11. GAHEC sets up the “My CE” page on its server. *(If desired, SR-AHEC CE staff can elect another name for this page.)* The MyCE page is the operational page where customers log in to view the Events for which they are registered. Here they can download resources, submit evaluations, and view/print certificates.
12. SR-AHEC provides on its website a link to the MyCE page, to be used by customers.
13. GAHEC provides access to an online utility that allows SR-AHEC staff to preview an evaluation and certificate for any CASCE Event.
14. GAHEC provides an online administrative data reporting page for use by SR-AHEC staff to extract reports. GAHEC provides a private URL that automatically logs in users who click on it.

## **Guide to Online Handout, Evaluation, and Certificate System**

**In Four Parts:** Overview of System, Staff Use, Customer Use, and Implementation Steps

15. Well in advance of the go-live date, SR-AHEC executes a marketing plan to advise customers of the new system, provide simple instructions for its use, and state how to access MyCE.
16. GAHEC and SR-AHEC test the system before the go-live date and advise SR-AHEC of any data misfits with the system.
17. GAHEC enables the system on the selected go-live date and notifies the SR-AHEC liaison, who notifies SR-AHEC CE personnel.
18. This system went live on February 14, 2012.