



# Continuing Medical Education

## CONFERENCE PLANNING SERVICES

*This guide has been created for you by the Conference Planning team at UF Continuing Medical Education.*

*UF CME offers full planning services for your in-person or virtual event.*

Visit [cme.ufl.edu/planning-services/](http://cme.ufl.edu/planning-services/) for more information or to contact us. We'd love to see how we can help!

## TAKING ATTENDANCE FOR VIRTUAL EVENTS

### CME Requirements for Attendance Reporting

The following items are required to be submitted to the CME Office by the program administrator to report CME credit:

1. First Name
2. Last Name
3. Credentials
4. Provider License #
5. Email Address

### Collecting Attendance

Zoom allows you to collect registrations for your program with an internal registration system. For instructions on how to set up Zoom Registration and export attendance from Zoom, view our [Zoom Registration Resource](#). If you are not using the Zoom Registration Feature, you will need an alternate method to collect participant information.

Using Qualtrics (as demonstrated below), or another form collector (such as Gravity Forms on your UF WordPress Website), collect the required information and redirect the form to the Zoom Link:

1. Set up survey in Qualtrics with required fields

The image shows a screenshot of a Qualtrics form titled "UNIVERSITY of FLORIDA". The form contains five input fields, each with an orange arrow pointing to it from the left. The fields are: "First Name", "Last Name", "Credentials (MD, NP, PA, RN, LCSW...or N/A if not applicable)", "License Number (or N/A if not applicable)", and "Email Address". Each field is represented by a white rectangular input box.

2. Under **“Survey Options”**, select **“Redirect to a full URL, ex. ‘https://www.qualtrics.com’”** and paste your Zoom Meeting Link, and click **“Save”**.

XM CME Virtual Program Sign-In

Survey Actions Distributions Data & Analysis Reports

Look & Feel Survey Flow **Survey Options** Tools

CME Virtual Program Sign-In Survey Options

Survey Protection

- Open Access.** Allow anyone to take this survey.
- By Invitation Only.** Prevent people from taking the survey using an anonymous survey link.

Survey Termination

- Password Protection.** This password must be entered to take this survey:
- Prevent Ballot Box Stuffing.** Keep people from taking this survey more than once.
- HTTP Referrer Verification.** The user must come from this URL to take the survey:
- Prevent Indexing.** A tag will be added to the survey to prevent search engines from indexing it.
- Secure Participants' Files.** Files uploaded as responses can only be viewed by users with permission to view responses.
- Show a **custom message** when a respondent revisits a **previously completed link**.
- Survey Expiration.** The survey will only be available for a specified date range.

Inactive Surveys

- Default** inactive survey message.
- Custom** inactive survey message...

Partial Completion

**Record** responses in progress **1 Week** after respondent's **last activity**

Please note, the recipient cannot continue taking the survey once their data is recorded or deleted.

Close **Save**

Zoom Meeting Link will go here

3. The link you will distribute to attendees to join the meeting will be the Qualtrics/Survey link, which can be found under **“Distributions”** » **“Anonymous Link”**

XM CME Virtual Program Sign-In

Survey Actions **Distributions** Data & Analysis Reports

Pause Response Collection

Distribution Summary

- Anonymous Link**
- Emails
- Personal Links
- Social Media
- Offline App
- QR Code

Anonymous Survey Link

A reusable link that can be pasted into emails or onto a website, and is unable to track identifying information of respondents.

[https://ufl.qualtrics.com/jfe/form/SV\\_d4FG0mZ2Tj54QaF](https://ufl.qualtrics.com/jfe/form/SV_d4FG0mZ2Tj54QaF)

Customize Link

This will be the link you distribute to attendees to join the meeting.

# Exporting and Submitting Attendance to the CME Office

## 1. Export data from Qualtrics Survey

The screenshot shows the Qualtrics Reports interface. The 'Reports' tab is selected in the top navigation bar. Below it, the 'Default Report' is chosen. A 'Share Report' button is highlighted with an orange box, and its dropdown menu is open, showing options like 'PDF Document', 'Word Document', 'PowerPoint Slides', and 'CSV (Comma Separated)', which is also highlighted with an orange box. On the left, a sidebar shows a list of questions, with 'Q1 - First Name' and 'Q2 - Last Name' visible.

## 2. Transpose exported data into [CME Attendance Sheet](#), fill out the remaining information at the top Excel, and email to the CME Contact that you have been working with to accredit your program.

The screenshot shows two Excel spreadsheets side-by-side. The left spreadsheet is titled 'Default Report (4).csv' and contains the following data:

Q2 - Last Name	Q1 - First Name	Q3 - Credentials (MD, NP, PA, RN, LCSW...or N/A if not applicable)	Q4 - License Number (or N/A if not applicable)	Q5 - Email Address
Crisafulli	Rayven			rayven.g@ufl.edu
Gamache	Gianna			ggamache@ufl.edu

The right spreadsheet is titled 'Attendance-Template-Course (2).xlsx' and is the 'ATTENDANCE SHEET' template. It has a header section for activity details and a table for attendee information. Orange arrows indicate the mapping of data from the CSV to the attendance sheet:

- Row 10 (Crisafulli) maps to Row 13 (Rayven) in the attendance sheet.
- Row 11 (Gamache) maps to Row 14 (Gianna) in the attendance sheet.
- Row 25 (rayven.g@ufl.edu) maps to Row 13 (Rayven) in the attendance sheet.
- Row 28 (ggamache@ufl.edu) maps to Row 14 (Gianna) in the attendance sheet.

The attendance sheet table has the following columns: Last Name, First Name, Credentials, Provider License #, and Email.