



Interprofessional
Continuing Education Partnership
UNIVERSITY OF WISCONSIN-MADISON

Convey Disclosure Tip Sheet

Situation 1: Speaker tells you they haven't gotten the email with the link to complete their COI.

- You have two choices: either instruct the speaker to contact Convey themselves or contact Convey on the person's behalf.
 1. If the speaker is contacting Convey themselves, they will fill out this form: <https://www.aamc.org/contact-convey-support>.
 - a) For "Which best describes you," they will select "Discloser."
 - b) Select the appropriate "Reason for contacting us."
 - c) This is the information to put in "Your Message":
 - This request is for UW-Madison ICEP regarding the re-sending of a link.
 - Their ID number in Ethos – you must provide this to them.
 - Disclosure purpose: the title of the session in Ethos – you must provide this to them.
 - The email address to send the link to.
 - Let the speaker know that when they get the link, they cannot forward it to someone else to complete for them. It is a one-time-use-only link.
 2. If you are contacting Convey for a speaker, fill out this form: <https://www.aamc.org/contact-convey-support>.
 - a) Enter YOUR name and email.
 - b) For "Which best describes you," select "Subscriber."
 - c) Select the appropriate "Reason for contacting us."
 - d) This is what to put in "Your message":
 - This request is for UW-Madison ICEP regarding the re-sending of a link.
 - I am an activity coordinator for the UW Department of <name of department>.
 - **PICK ONE:** I am listed as the Convey Contact for this activity **OR** <Name of person> is my co-coordinator and listed as the Convey Contact for this activity.
 - The name of the person who needs to disclose.
 - The person's ID number in Ethos.
 - Disclosure Purpose: The title of the session in Ethos
 - The email address to send the link to. Two choices:
 - Give your email so you can forward the link to the person directly after Convey sends it to you. Do NOT click on the link they send. It is a one-time-use-only link and will not work for the speaker if you click on it first to test it.
 - Give the person's email—one you know they will check.
 - Don't ask Convey to "re-send the email." They will say they can't help you and to contact ICEP.

Situation 2: Speaker hasn't completed COI and you want to follow-up with them

- Convey automatically sends reminder emails to complete COI every three days once a person is named as a speaker in a session. The email Convey uses is the email that is associated with the person's account in Ethos.
- If you still want to send the speaker additional reminders via email, we suggest the following verbiage:

Our records indicate that you have not completed your disclosure for <<TITLE OF SESSION, DATE>>. Please follow the steps below. If you do have difficulty, let me know at which step you become stuck, and describe the problem you encounter.

1. Find the email from info@icep.wisc.edu titled "CE Disclosure Request for UW Madison ICEP Continuing Education for <<Title of Session – Date of Session>>." This email was sent to your <<insert email>> account.
2. Click the link "Start Disclosure for UW – Madison ICEP CE." You will be sent to the AAMC login screen. If you don't have an account with AAMC, create one.
3. Use your AAMC username and password to log in. You will be sent to the screen titled "Sending Disclosure To: UW – Madison ICEP CE."
4. Click Save and Continue at the bottom of this screen.
 - If you have interests in the system, you will be asked to review and disclose. Follow the prompts to complete your disclosure.
 - If you do not have any interests, select "Add an Interest" or "Nothing to Disclose" and follow the prompts to complete your disclosure.

Situation 3: Speaker completed COI for your session but now wants to add to or change their disclosure

- If a speaker wants to disclose again for the same session, you can either upload an email from them in which they state their new responses to COI or they can log in to AAMC and make changes there:
 1. Go to <https://convey.aamc.org> and log in with their AAMC username and password.
 2. On the Main/Home page in the section titled "Recently Submitted Disclosures," click on "View All Disclosures>."

Convey Global Disclosure System | AAMC

Main Send Disclosure My Interests My Profile - History Help

Attention: The Convey Global Disclosure System will be offline for scheduled maintenance on Sunday, January 12, 2020 from 5am ET to 9am ET. Users will be unable to sign into the Convey system during this time. We apologize for any inconvenience, and thank you for your patience as we work to improve your Convey experience.

Welcome to Convey

Convey is designed to reduce the amount of time you spend making required disclosures of interests. The system simplifies the process of disclosing required information by maintaining a repository for your interest records so you can easily disclose to any organization that uses Convey.

Disclose to an Organization

Search for an Organization

Build My Repository

Add an Interest View My Interests >

Recently Submitted Disclosures

UW – Madison ICEP CE	Jan 09, 2020
UW – Madison ICEP CE	Dec 03, 2019
UW – Madison ICEP CE	Oct 29, 2019

View All Disclosures >

3. Determine which disclosure to update by clicking “View.” Then click “Redisclose” and follow the prompts on the screen, clicking “Continue” or “Save and Continue” until you “Certify and Submit.”
 - a. Currently, this only works for UW-ICEP disclosures if yours was the last disclosure they completed.
 - b. ICEP is working with Convey to make all previous disclosures eligible for editing

History

Your Disclosures

Date Submitted	Time Submitted	Disclosed to Organization	Action
Jan 09, 2020	12:13 PM	UW – Madison ICEP CE	View Redisclose
Dec 03, 2019	3:24 PM	UW – Madison ICEP CE	View Redisclose
Oct 29, 2019	11:38 AM	UW – Madison ICEP CE	View Redisclose
Oct 29, 2019	8:52 AM	UW – Madison ICEP CE	View Redisclose
Oct 29, 2019	8:51 AM	UW – Madison ICEP CE	View Redisclose

Showing 1-5 of 11 [« Prev](#) [1](#) [2](#) [3](#) [Next »](#)

kim sprecker Jan 09, 2020 13:13:39 EST
UW – Madison ICEP CE

Discloser Identifier: 2 **Disclosure Purpose:** Test Epic XGM

Summary of Financial Interests

I do not have any financial interests to disclose at this time.

Additional Information:

- I intend to reference unlabeled/unapproved uses of drugs or products in my presentation(s).
Not Applicable (Planners and Reviewers Only)
- I intend to use patient and/or research subject identifiers in my presentation.
Not Applicable (Planners and Reviewers Only)
- Please specify any additional information which you consider relevant to this disclosure.

Certification

I represent that the foregoing information is complete and truthful.

Situation 4: The speaker is no longer speaking at a session

- In the Faculty tab, remove the speaker via the Faculty List tab.

Faculty list

View Edit Enrollments Workflow Reminders Faculty Course outline Course reports Revisitors Repeat this session

Add faculty Faculty list All forms Financial relationships Convey faculty

Features

Home Sessions

Add content

Session

Admin

Edit Regulatory Scheduled Series (RSS) Features Members Group dashboard Workflow

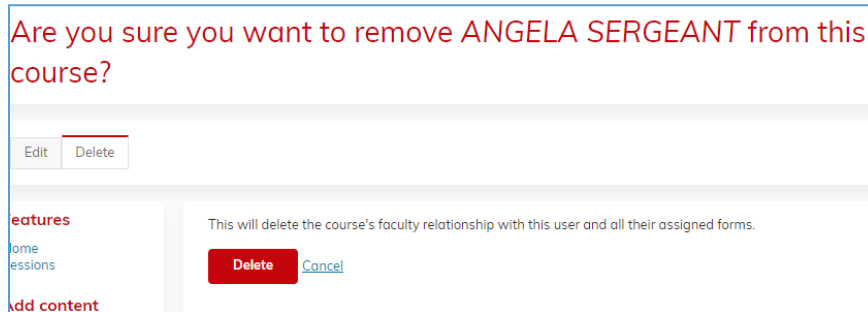
Name Role Apply

Unenroll Faculty Fetch relationships Modify Published State Send e-mail

0 rows selected

<input type="checkbox"/>	First name	Last name	Role	E-mail	Published	Enrolled	Relation	Delete
<input type="checkbox"/>	ANGELA	SERGEANT	Speaker/Author	ASERGEANT@UWHEALTH.ORG	No	No	Edit	Delete

1. Click “Delete” in the “Delete” column on the line with their name.
2. Click “Delete” to confirm



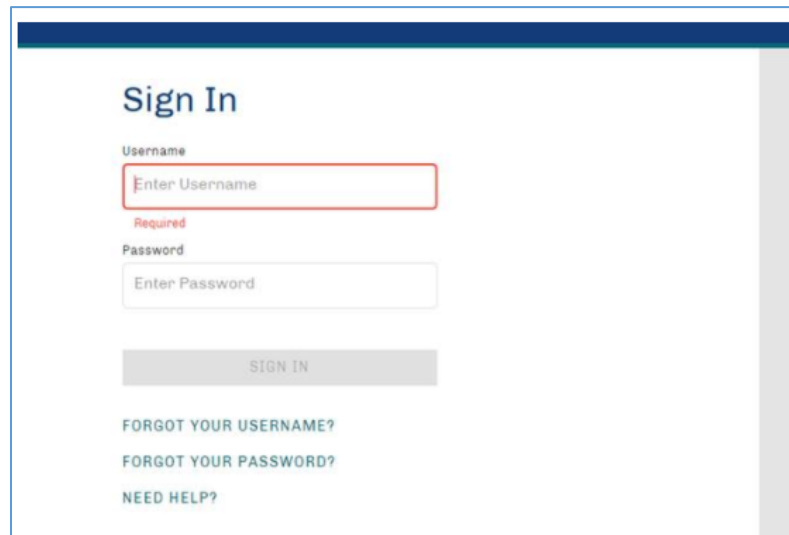
3. Removing their name will stop the reminder emails from going to them if they have not completed COI yet. If they click the link to complete COI after you have removed them, they will see a pop-up message stating the link is invalid.

Situation 5: The date for a session changes after the speaker has disclosed

- Once the speaker has disclosed, the date of the session can be changed in Ethos without having to get another disclosure from the speaker as long as the session is within the same RSS cycle.

Situation 6: Speaker knows they have an account but can't remember username or password

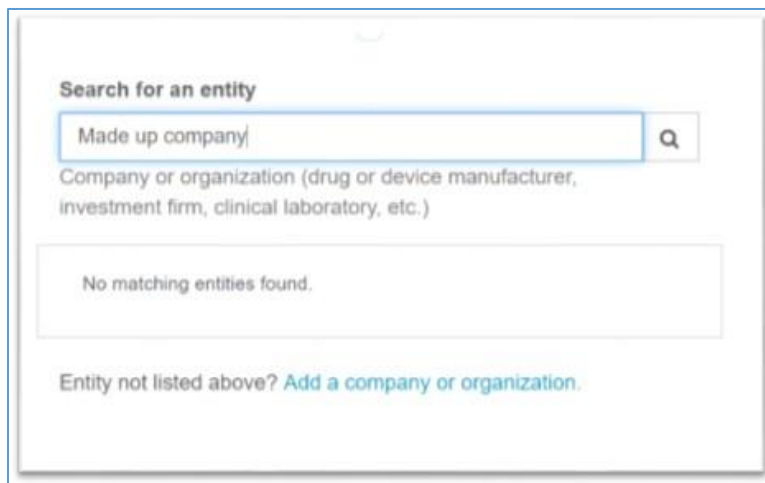
- The home page Convey.aamc.org has a reset feature for username and password.



- Additionally, the “NEED HELP?” link provides access to all sorts of Q&A about the AAMC account.
- Ultimately, if this is an AAMC access issue, they (the account holder) will have to handle it through AAMC. You cannot do it for them. Send them to <https://www.aamc.org/contact-convey-support>

Situation 7: Speaker doesn't see the entity they are trying to disclose for in the drop-down list in Convey

- If the speaker types in a company name and no options or only incorrect options populate, they should hit Enter or click the Magnifying Glass. The system will come back with this message and a link to add a company name.



Search for an entity

Made up company

Company or organization (drug or device manufacturer, investment firm, clinical laboratory, etc.)

No matching entities found.

Entity not listed above? [Add a company or organization.](#)

Situation 8: Speaker identifies relationships in Summary of Financial Interests



Stephen M Jul 29, 2020

Discloser Identifier: 72003 Requested Date: Jul 29, 2020

Summary of Financial Interests:
Medacta USA (Contractor),
instrument and implant design (Otherp)

Additional Information

1. I intend to reference unlabeled/unapproved uses of drugs or products in my presentation(s).
No

2. I intend to use patient and/or research subject identifiers in my presentation.
Yes

- Anything disclosed requires a resolution. Consult the document “Mitigating Relevant Financial Relationships” on the RSS Community page for more information.

Situation 9: Speaker answers “NO” to the question: “I have [read the requirements](#) to ensure that the educational content in this accredited activity is fair and balanced, and that any clinical content presented supports safe, effective patient care and I will abide by these expectations.”

- Ask speaker to confirm via email if they meant NO. If they did, the session cannot be accredited.
- If they meant YES, upload to the session their email in which they state their intended YES answer.

Situation 10: Speaker answers “YES” to the question “I intend to reference unlabeled/unapproved uses of drugs or products in my presentation(s).”

- Record a YES response in the table on the infosheet on the line that has the speaker’s name, in the column titled “Discussion of unlabeled/unapproved uses of drugs/devices in presentation.”

Name/Role	Financial Relationship Disclosures	Discussion of Unlabeled/Unapproved uses of drugs/devices in presentation?	COI completion date
Presenter Name, Presenter	Disclosure information	Yes	date

- The disclosure slide must indicate YES.
- During the presentation, the speaker must verbalize when they are talking about unlabeled/unapproved uses of drugs or products.
- No slide review is needed.

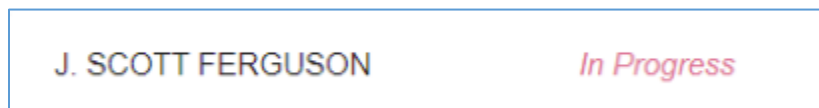
Situation 11: Speaker answers “YES” to the question “I intend to use patient and/or research subject identifiers in my presentation.”

- Follow-up with the speaker to confirm they have permission to use protected health information.
- Upload documentation of permission from the patient(s) or the email from the speaker stating they have permission.

Situation 12: Speaker answers “YES” to the question “I intend to discuss a topic or topics that are not, or not yet, adequately based on current science, evidence, and/or clinical reasoning that fall(s) outside the standard of care.”

- Slide review is required. Upload slides and content review form to session.

Situation 13: Speaker’s COI is stuck in “In Progress” status



- Option 1: Direct the speaker back to the original email requesting the disclosure. They will click the link, log in, and complete the disclosure all the way through the final button “Certify and Submit.”
- Option 2: The speaker logs in to <http://convey.aamc.org>. From the main page, click on the link in “Continue a Disclosure.”

Long-term options for helping faculty find the email from info@icep.wisc.edu that contains the COI link

- Option 1: Add info@icep to the safe senders list (instructions on RSS Community)
- Option 2: Create an Outlook rule that directs emails from info@icep into a specific folder