COI/CME Presentation Review Flow for Reviewers

Version 1.0

January 2024
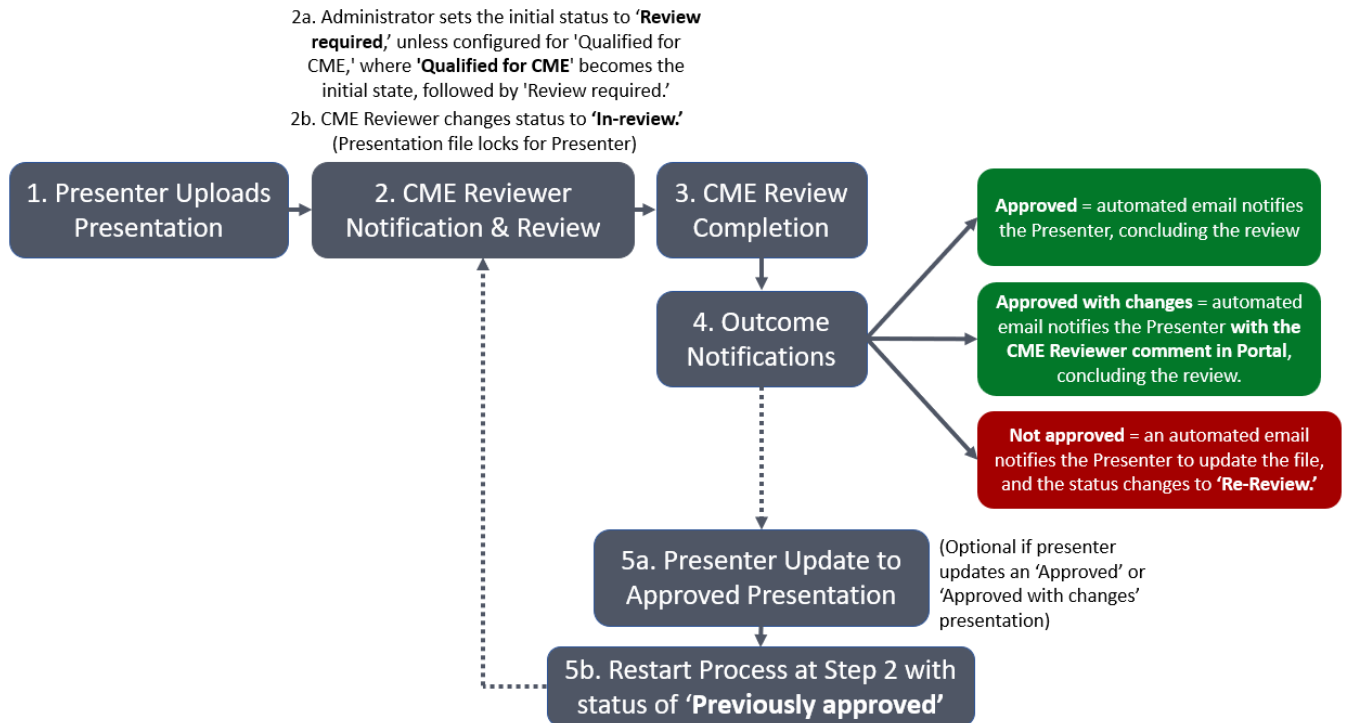
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2a. Administrator sets the initial status to '**Review required**,' unless configured for 'Qualified for CME,' where **'Qualified for CME'** becomes the initial state, followed by 'Review required.'
2b. CME Reviewer changes status to **'In-review.'** (Presentation file locks for Presenter)

```
1. Presenter Uploads     →    2. CME Reviewer         →    3. CME Review
   Presentation               Notification & Review         Completion
                                                                 ↓
                                                            4. Outcome
                                                            Notifications
```

Approved = automated email notifies the Presenter, concluding the review

Approved with changes = automated email notifies the Presenter **with the CME Reviewer comment in Portal**, concluding the review.

Not approved = an automated email notifies the Presenter to update the file, and the status changes to **'Re-Review.'**

```
5a. Presenter Update to     (Optional if presenter
    Approved Presentation    updates an 'Approved' or
                             'Approved with changes'
                             presentation)

5b. Restart Process at Step 2 with
    status of 'Previously approved'
```

1. **Presenter Uploads Presentation:**
   a. Presenter logs into the Portal and uploads the presentation.
2. **CME Reviewer Notification and Review:**
   a. CME Reviewer receives an email about the uploaded presentation.
   b. CME Reviewer logs in, may complete an optional form, and changes CME status to "Review required" (**ONLY if** the previous step was "Qualified for CME," otherwise, the initial status after a presentation upload is "Review Required").
   c. CME Reviewer then locks the file by changing the status to "In-review," preventing further updates by the presenter.
3. **CME Review Completion:**
   a. CME Reviewer updates status to "Approved," "Approved with changes," or "Not approved."
4. **Outcome Notifications:**
   a. If **"Approved,"** an automated email notifies the Presenter, concluding the review.
   b. If **"Approved with changes,"** an automated email notifies the Presenter with the CME Reviewer comment in Portal, concluding the review.
   c. If **"Not approved,"** an automated email notifies the Presenter to update the presentation, and the status changes to "Re-Review."

   (Optional)

   5a. Presenter Update to 'Approved' or 'Approved with changes' Presentation:
   - Presenter may delete and upload a new file.
   - CME status changes to "Previously Approved," notifying the CME Reviewer.

   5b. Restart Process:
   - The CME Review workflow restarts from step 2.