



Regularly Scheduled Series Coordinator Training on CloudCME: CME Activities

Office of Faculty Development and Continuing Medical Education

General information on CME

CME has multiple course types

- This training is for CME Regularly Scheduled Series (RSS)

CME uses the CloudCME learning management system (LMS) for many activities

- RSS LMS = CloudCME

Three Primary Groups in CME Education

- Three primary groups that are involved in CME education:
 - Department Education Team: course chair, planning committee, coordinator and presenters
 - CME provider
 - Learners

Three primary functions to CME education in CloudCME

Three primary functions of LMS:

- 1) Department Education Team: Course chair, planning committee, coordinator and presenter activity responsibilities
- 2) CME provider's certification of activities
- 3) Learner access for:
 - recording their attendance
 - receiving credit
 - obtaining certificate and transcripts

Coordinator is actively involved in #1 & #3

Terminology in CloudCME

- System User = Coordinators, Administrators, Educators, Learners
- Faculty = Educator
 - e.g. Course Chairs, Co-chairs, Planners, Speakers/ Presenters, Moderators, Facilitators, etc.
- Learner = Anyone attending an educational activity

Reminder: An individual can have one or more role. All roles apply to UCD employees, as well as guests external to UCD.

Terminology in CloudCME (continued)

- AP = Attendee Portal (CloudCME Home Page)
- Couse Director = Course Chair
- Parent = Regularly Scheduled **Series** (RSS)
- Child/Children = RSS **activity/activities**
- GME/Non-CME = GME only

Regularly Scheduled Series Processes and LMS System Features for Coordinators

For CME Activities

Coordinator Action Items

- Coordinators train and support Department Education Team and/or Learners on the following:
 - Complete/set up profiles with consent
 - Faculty educator disclosures
 - Pairing mobile phone and download CloudCME app.
 - Training on ways to claim credit and prepare for attending activities
- Coordinators prepare and submit RSS child activities for CME review and approval
- Coordinators provide learner information day-of activity and work with faculty educators

Supporting Department Education Team

Department Education Team Action Item: Complete Profile

- Action Item: Complete Profile

Applies to: All CloudCME Users

Location: <https://ucdavis.cloud-cme.com>

Help Guide: [Create/Update Profile](#)

Key points:

- If UCDH employee already has an EEDS account – they will have a skeleton profile in CloudCME. Employee MUST still log in via SSO and complete. **Confirm the transferred skeleton profile contains the correct name, email and other information. If name and/or email are incorrect, please notify OCME and refrain from updating the profile further until receiving notice from OCME to proceed.** If name and email are accurate, but other info is incorrect, simply update, consent and submit.
- If UCDH employee did not have an EEDS account – Sign in **via Kerberos** and complete a profile.
- Everyone should consent at bottom of profile before submitting (critical for Surgery ABS Diplomats attending Surgical Academic Forum).
- There is no report available to departments to determine profile completion.

Department Education Team Action Item: Complete Disclosure

- Action Item: Complete Disclosure

Applies to: CME Educators

(e.g. Course chairs, co-chairs, planners, speakers, facilitators, moderators, etc.)

Location: <https://ucdavis.cloud-cme.com>

Help Guide: [Complete/Update a Disclosure](#)

- Two pathways:
 - Via Faculty Tab (when signed into Activity Portal)
 - Via Disclosure Tile (from home page)
- Coordinators do not typically need to complete a disclosure even if have a Faculty Tab displaying

Department Education Team - Tile Features

Course Consultation – where Course Chair requests a consult for a new course

Course Request Form:

- Where Course Chair completes a request form for a new course
- Two Evaluation options for activities (Different)
 - CME Questions
 - CME Questions plus System Speaker Questions (see next slide)

Upon CME's approval of the series, coordinators are granted CloudCME permissions for the respective series



Faculty Educator Tile Features

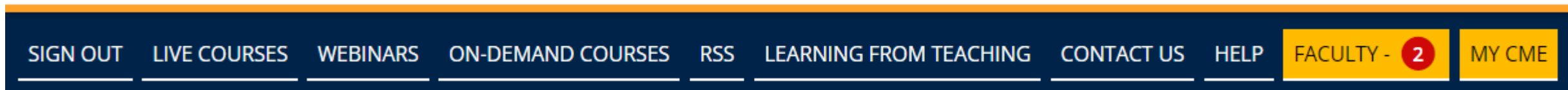
Educator Resources – directs Faculty Educator to other resources related to educational courses on OCME website

Disclosure Form – another pathway of where Faculty Educator completes their financial disclosure form



Regularly Scheduled Series Processes for Dept. Education Team

MY CME TAB
For CME Activities

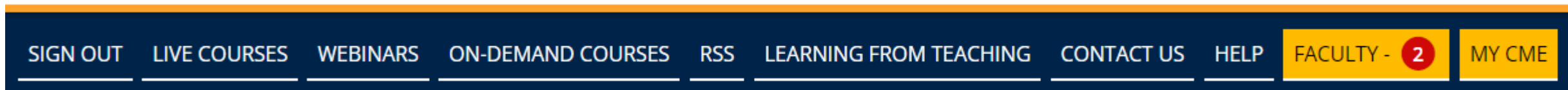


Department Education Team Tab Features

- MY CME Tab
 - Profile (required for everyone)
 - Faculty Educators must complete their profile in CloudCME
 - Profile can be completed via the Attendee Portal (AP) or the CloudCME app on mobile phone
 - Faculty Educator must complete their profile before completing disclosure form
 - Coordinators
 - For new external faculty, coordinators can initiate a profile/account shell through the 'Add Member' feature, however Faculty Educator must still sign-in and complete the profile
 - Do not use the 'Add Member' feature for UCD employees --- Faculty Educators need to sign on with UCD Single Sign-On (SSO) to complete their profile

Regularly Scheduled Series Processes for Dept. Education Team

Faculty Tab
for CME Activities



Global Tasks

Activity Tasks

1 Peer Reviewer Tasks

1 Upcoming Presentations

Department Education Team - Faculty Tab Features

- Faculty Tab: Will display for anyone who held an educator and/or planner role in previous LMS (EEDS) in the past
 - Global Tasks
 - Disclosure
 - Where Faculty Educator completes and/or updates their disclosure form
 - Disclosure form needs to be completed in CloudCME system by Faculty Educator
 - Coordinator cannot complete disclosure for educator
 - Activity Tasks
 - Where Faculty Educator will complete Consent to Record and/or perform Content Review (aka: Content Validation) form, when assigned
 - Peer Reviewer
 - Where Faculty Educator completes the Conflict of Interest Mitigation Process, when assigned by OCME
 - Upcoming Presentations
 - Where speakers upload their presentations
 - Coordinators can upload presentations on behalf of faculty educator through different pathway

Preparing the RSS Activity and Providing Day-of Activity Support

Managing the RSS in CloudCME

RSS Parent Series and Child Activities

- OCME creates and maintains RSS Parent Series for changes/updates
- Changes to CME Parent Series should be communicated to OCME via the Support Request form on the CloudCME help page
- OCME creates RSS Child Activity templates stemming off the Parent series
- Child activity templates are built by OCME and released to dept. coordinators 2X/year in increments.
 - Jan.1 – June 30 templates --- built and released in Oct./Nov. timeframe
 - July 1 – Dec. 31 templates --- built and released in Apr./May timeframe

Department Coordinators (you) edit and complete the RSS Child Activities in preparation for certification review

Managing the RSS in CloudCME

RSS Child Activity Evaluations:

- All RSS CME Child Activities are setup with the OCME evaluation plus Speaker questions
- **CME** Child Activities – if a mandatory learner evaluation is needed or speaker questions need to be removed, submit change request in advance via the Support Request form on the CloudCME Help page
- Evaluation reports can be requested by completing the Evaluation Request form on the CloudCME Help page

CloudCME System Speaker Evaluation Questions

Speaker 1

Knowledge about subject matter

☐ Excellent ☐ Very Good ☐ Good ☐ Fair ☐ Poor ☐ N/A

Prepared and organized

☐ Excellent ☐ Very Good ☐ Good ☐ Fair ☐ Poor ☐ N/A

Ability to communicate well

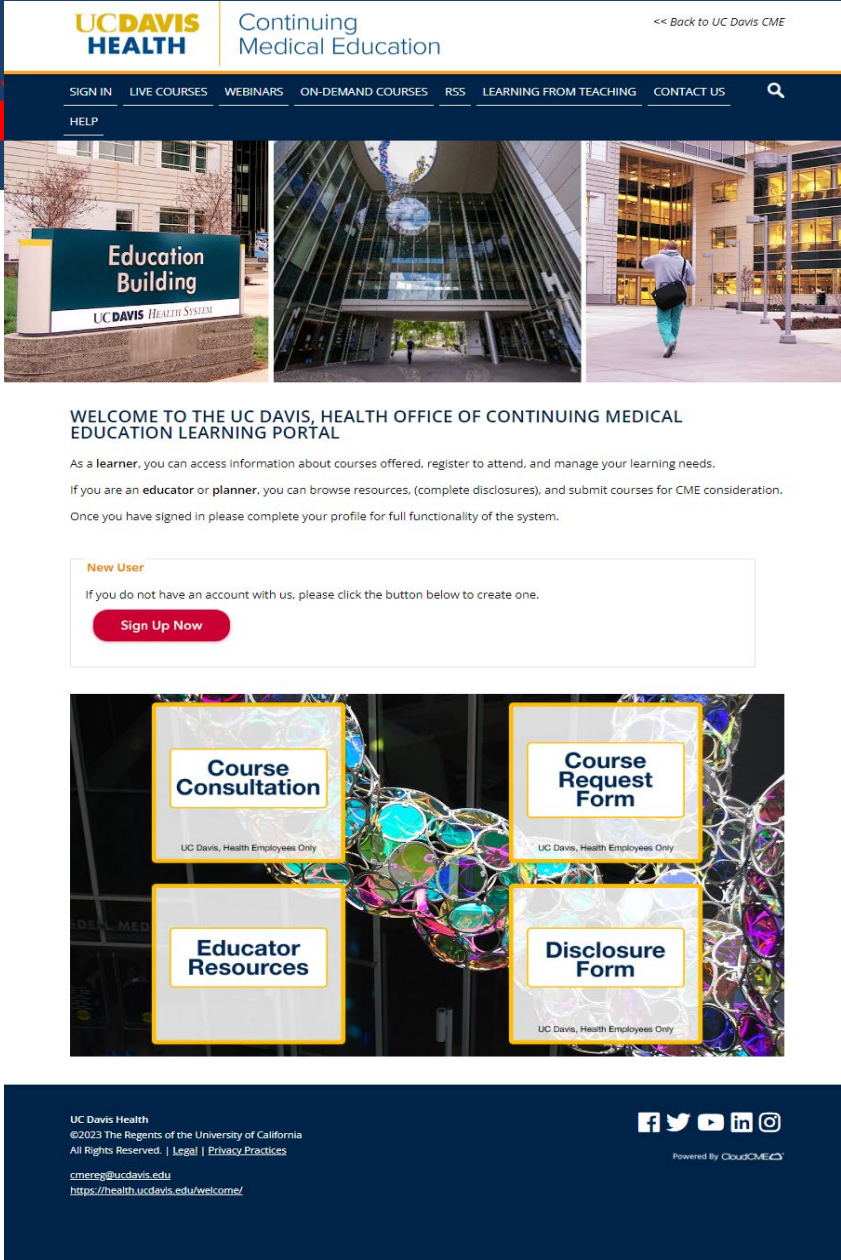
☐ Excellent ☐ Very Good ☐ Good ☐ Fair ☐ Poor ☐ N/A

Overall strength of presentation:

☐ Excellent ☐ Very Good ☐ Good ☐ Fair ☐ Poor ☐ N/A

CloudCME Attendee Portal (AP)

- URL <https://ucdavis.cloud-cme.com/>
- Front/Home Page of LMS:
 - Sign in
 - Learner & Faculty Educator Tabs
 - Faculty Educator Tiles
- Sign-in using Kerberos
- Complete Profile
 - Upon first sign in the system will direct all new users to complete their profile (which includes consent)
 - MY CME tab also contains a Profile tab



The screenshot displays the UC Davis Health Continuing Medical Education Learning Portal. The header includes the UC Davis Health logo, the text "Continuing Medical Education", and a link "<< Back to UC Davis CME". The navigation bar contains links for SIGN IN, LIVE COURSES, WEBINARS, ON-DEMAND COURSES, RSS, LEARNING FROM TEACHING, CONTACT US, and HELP. Below the navigation bar is a banner image showing the Education Building and a person walking. The main content area welcomes users to the UC Davis, Health Office of Continuing Medical Education Learning Portal. It provides instructions for learners, educators, and planners. A "New User" section offers a "Sign Up Now" button. Below this, there are four tiles for "Course Consultation", "Course Request Form", "Educator Resources", and "Disclosure Form", each with a "UC Davis, Health Employees Only" label. The footer contains copyright information, contact details, and social media links.

UC DAVIS HEALTH Continuing Medical Education << Back to UC Davis CME

SIGN IN LIVE COURSES WEBINARS ON-DEMAND COURSES RSS LEARNING FROM TEACHING CONTACT US HELP

Education Building UC DAVIS HEALTH SYSTEM

WELCOME TO THE UC DAVIS, HEALTH OFFICE OF CONTINUING MEDICAL EDUCATION LEARNING PORTAL

As a **learner**, you can access information about courses offered, register to attend, and manage your learning needs.

If you are an **educator** or **planner**, you can browse resources, (complete disclosures), and submit courses for CME consideration.

Once you have signed in please complete your profile for full functionality of the system.

New User

If you do not have an account with us, please click the button below to create one.

Sign Up Now

Course Consultation
UC Davis, Health Employees Only

Course Request Form
UC Davis, Health Employees Only

Educator Resources
UC Davis, Health Employees Only

Disclosure Form
UC Davis, Health Employees Only

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cme@cme@ucdavis.edu
<https://health.ucdavis.edu/welcome/>

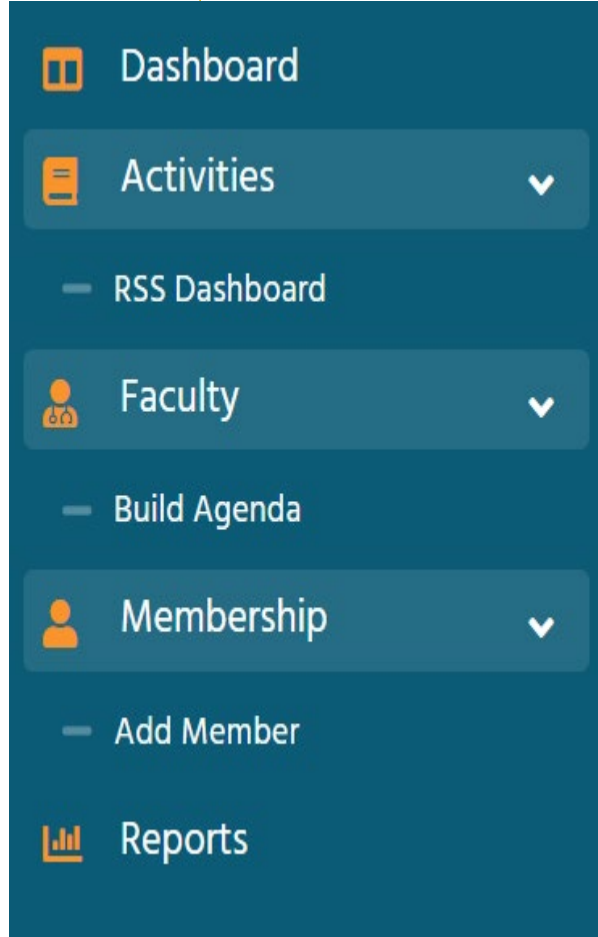
Facebook Twitter YouTube LinkedIn Instagram
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Coordinator Administration Section in CloudCME



Note: You must be signed in to access administration link

CloudCME Department Coordinator Administration Features



- Administration Link
 - Dashboard
 - RSS Dashboard - where department coordinator build-out activities
 - Faculty
 - Build Agenda – where department coordinator adds child activity specifics
 - Membership
 - Add Member - Where department coordinator can create shell for new external Faculty Educators only
 - **Do not use for UCD employees** --- Employee should sign on with UCD Single Sign-On (SSO)
 - Reports
 - Credits – where department coordinator can view/download credits by a variety of searchable fields (e.g. name, profession, etc.)
 - RSS Attendance History – shows aggregate attendance and detailed attendance roster by learner name
 - Transcripts – department coordinator can view/download transcripts by a variety of options (e.g. child activity name, single learner transcript, etc.)

Preparing Child Activities

- Departments edit & complete child activities using templates
 - Child title (defaults to Parent series name)*
 - Must enter child title(s)
 - If the child activity is for UCD internal only, add “(Internal UCD Only)” – or – “(Dept. Only)” after the title of the presentation(s)
 - Agenda* including presentation title(s) and speaker(s) name
 - Presentation titles to include specific naming convention for non-certified portions: add “(Meeting)” after title
 - Learning Objectives
 - Speakers/Moderators/Facilitators (must have a profile/account)
 - Disclosures
 - Disclosures not required for GME/Non-CME activities
- Departments complete Child activities no later than 5 days prior to activity for review and approval

Preparing Child Activities (continued)

Status of Children - Dashboard

- **INCOMPLETE** – Coordinator action required
 - This status represents faculty that have not been assigned to the activity, a presentation has no disclosure on file, or the disclosure on file has expired.
- **PENDING** – CME team to review
 - This status represents faculty who have completed a disclosure, and no financial relationships were declared, (i.e. no financial relationships were disclosed, or COI was mitigated).
- **IN REVIEW** – CME team to review
 - This status represents Faculty who have a completed disclosure, and at least one financial relationship has been declared, triggering the COI Mitigation process. If one faculty member is rejected, and other faculty have been approved, the Activity Status will remain In Review
- **APPROVED** – session can proceed
- **REJECTED**
 - This represents faculty who have completed a disclosure, a financial relationship has been declared, and the conflict is declared immitigable. The activity is then **REJECTED**, the coordinator can remove this faculty member, select a new faculty member, and begin the process again.

- Look for Green Approved button.
- Activity must be approved prior to commencement.

Child Activities (Important)

- Changes made to child activity AFTER approval and before the course commences
 - Status reverts to “Incomplete”, “In Review” or “Pending” status
 - Must wait for approval again
- All child activities must be approved in system **PRIOR TO COMMENCING** for learner attendance to be processed
- If child is not approved, no attendance can be processed or tracked INCLUDING participation attendance
- Changes cannot be made AFTER the activity occurs

Important!

Important!

Important!

Important!

Child Activities (continued)

Activity Code:

- MUST use the child activity ID* and provide to learners
- Department manages who receives the code
 - Internal only is department's management

Flyer – Download and display flyer to all attendees prior to commencement of CME Accredited Approved Child activity

Note: If changes occur after approval, download the updated flyer

***Child Activity ID Code is used to claim credit.**

Learners must claim within 6 days from course! Be sure to communicate this information.

Supporting Learners

Checklist – Learner Action Items

- Action Item: Complete Profile

Applies to: All CloudCME Users

Location: <https://ucdavis.cloud-cme.com>

Help Guide: [Create/Update Profile](#)

Key points:

- If UCDH employee already has an EEDS account – they will have a skeleton profile in CloudCME. Employee MUST still log in via SSO and complete. **Confirm the transferred skeleton profile contains the correct name, email and other information. If name and/or email are incorrect, please notify OCME and refrain from updating the profile further until receiving notice from OCME to proceed.** If name and email are accurate, but other info is incorrect, simply update, consent and submit.
- If UCDH employee did not have an EEDS account – Sign in **via Kerberos** and complete a profile.
- Everyone should consent at bottom of profile before submitting (critical for Surgery ABS Diplomats attending Surgical Academic Forum).
- There is no report available to departments to determine profile completion.

Learner Action Items (preparation)

- Action Item: Pair Mobile Phone and Download CloudCME App

Applies to: Learners

Location: <https://ucdavis.cloud-cme.com>

Help Guides: [Pairing Phone for Texting Attendance](#)
[Download CloudCME App](#) (use org code: ucdavis)

Learner Action Items (claiming credit)

- Action Item: Understanding How to Claim Credit for Courses Attended

Applies to: Learners

Location: <https://ucdavis.cloud-cme.com>

Help Guides:

Texting Attendance

Scanning QR Code

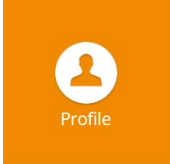
Claiming Credit (via Mobile App or Attendee Portal)

Key Points:

- There are three distinct ways to claim credit for a course attended.
- Texting is the preferred and easiest method.
- Scanning QR code can only be done through CloudCME mobile app. Scanning with camera does not work.
- **Learners must claim credit within 6 days of course!**

Learner Tabs & Features – MY CME Tab

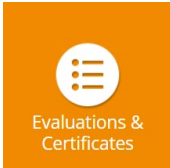
- MY CME Tab



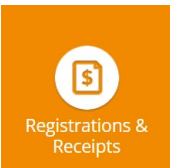
- Profile (AKA: account)
 - All Users must have a profile
 - Profile can be completed via the Attendee Portal or the CloudCME app on mobile phone



- Transcript
 - Learner can retrieve own transcript
 - Coordinator can retrieve transcript on behalf of learner from Administration-Reports



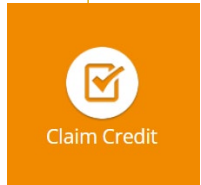
- Evaluations and Certificates (Different)
 - Post-course evaluations are located here
 - When an evaluation is mandatory, learner must complete it to generate their certificate



- Registrations and Receipts
 - Shows the courses for which they are registered and receipts for any courses paid to attend

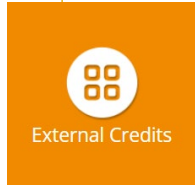
Learner Tabs & Features: MY CME Tab (continued)

- MY CME Tab (continued)



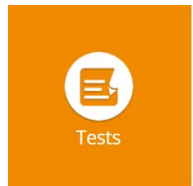
- Claim Credit (Different)
 - Learner must log their attendance within six days of activity to get credit and/or attendance
- Three ways in order of preference:
 - Texting attendance using activity code provided – **preferred method**
 - Scan QR code with CloudCME app (cannot use camera on phone)
 - Claim credit via the Attendee Portal (AP) using activity code provided
- Coordinators
 - Coordinators cannot record attendance or award credit

Learner Tabs & Features: MY CME tab (concluded)



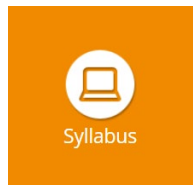
– External Credits

- Optional feature
- Learner completes form and uploads certificates awarded for courses outside of UCD CloudCME system.
 - E.g. UC Learning, external organizations, etc.
- Only Learner can upload (coordinator cannot upload on the learner's behalf)
 - Note: External credits currently in EEDS did not transfer to CloudCME



– Tests

- Learner goes here to complete tests required with associated activity



– Syllabus

- Learner goes here to view any uploaded syllabus associated with the activity

Additional Support and Communication Avenues

- OCME System Update/Guidance Emails
 - Sent periodically, typically from Shelley
- Help and Training Documents
 - Posted and updated on CloudCME Help Page
- CloudCME Questions (not answered in Help Guides) & Technical Issues
 - Complete *Request CloudCME Support* form to obtain assistance from Help Page
 - Please use form to access the OCME team vs. emailing
 - Access to vendor is limited – OCME needs information in request form to submit issue tickets
- Emails from CloudCME – arrive as “External” – Do not delete and set rule so do not go to spam folder

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8/27/2024

Training Guides

- To access the CloudCME training guides navigate to:
[UC Davis CloudCME Help](#)