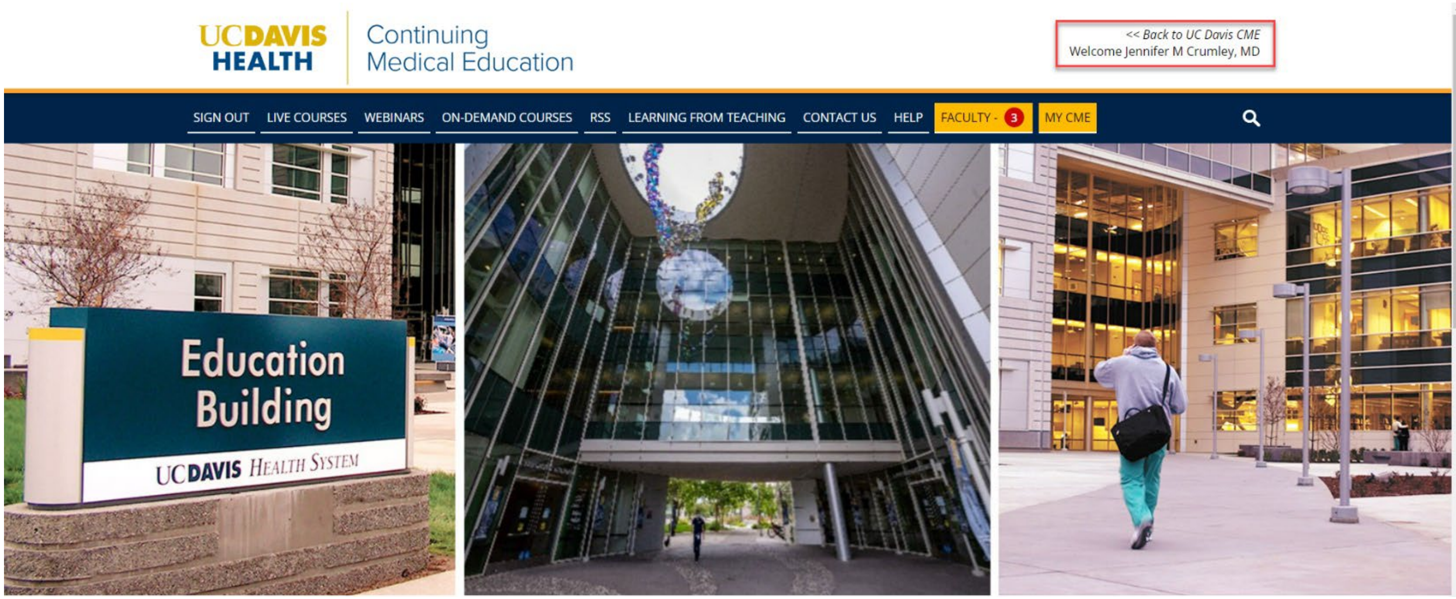
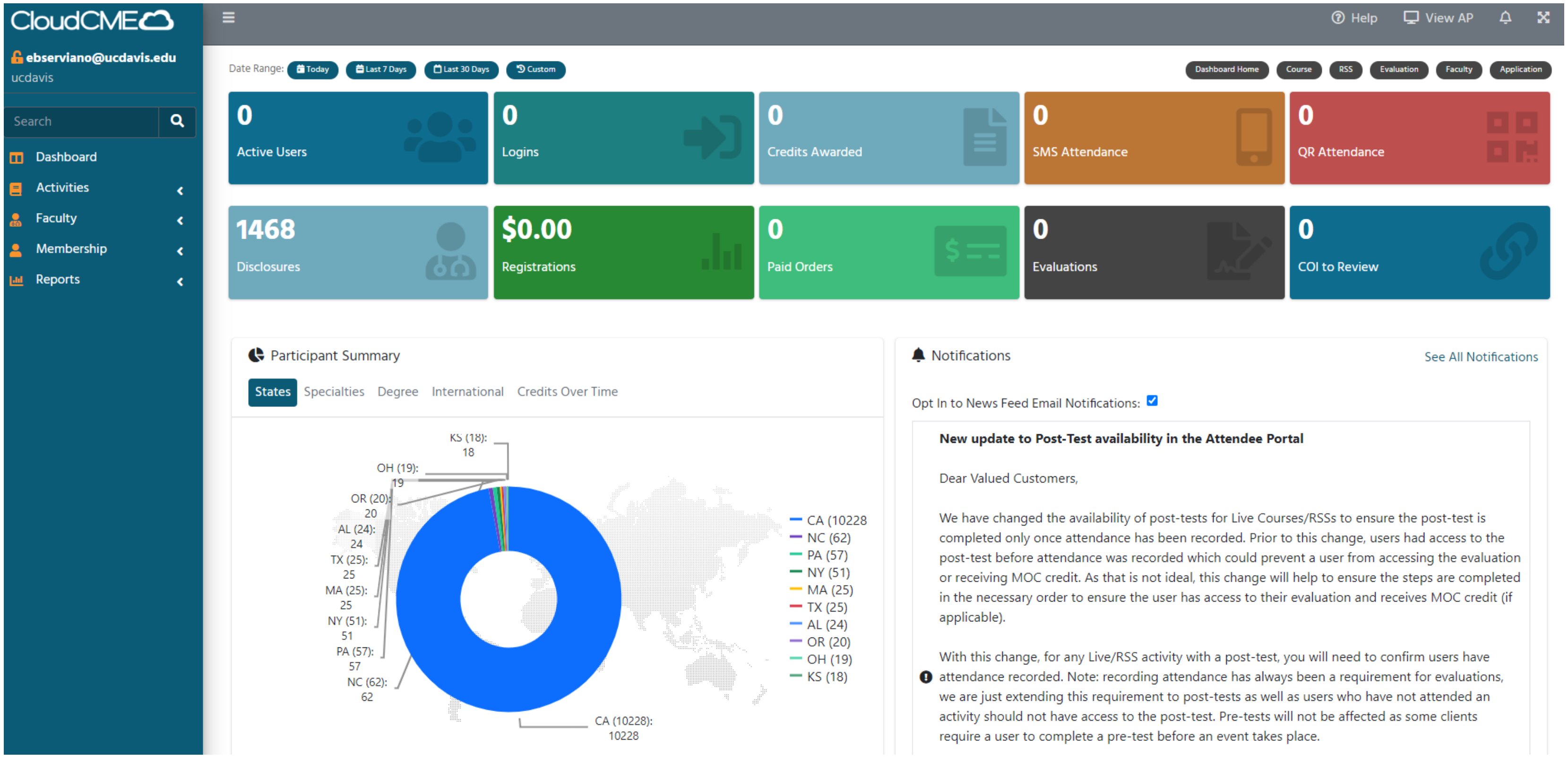
Office of Continuing Medical Education

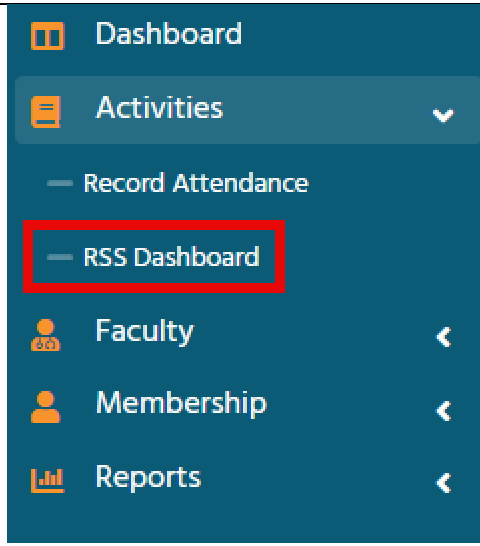
CloudCME® Guide for RSS Coordinators

Step		Action
1	View RSS Dashboard	1. Login at UCSD CloudCME website- https://ucdavis.cloud-cme.com/default.aspx • You'll know you've logged in as your name will show up in the top right corner  2. Navigate to the bottom of the page and click on **Administration** Administration **UC Davis Health** ©2023 The Regents of the University of California All Rights Reserved. | Legal | Privacy Practices cmereg@ucdavis.edu https://health.ucdavis.edu/welcome/

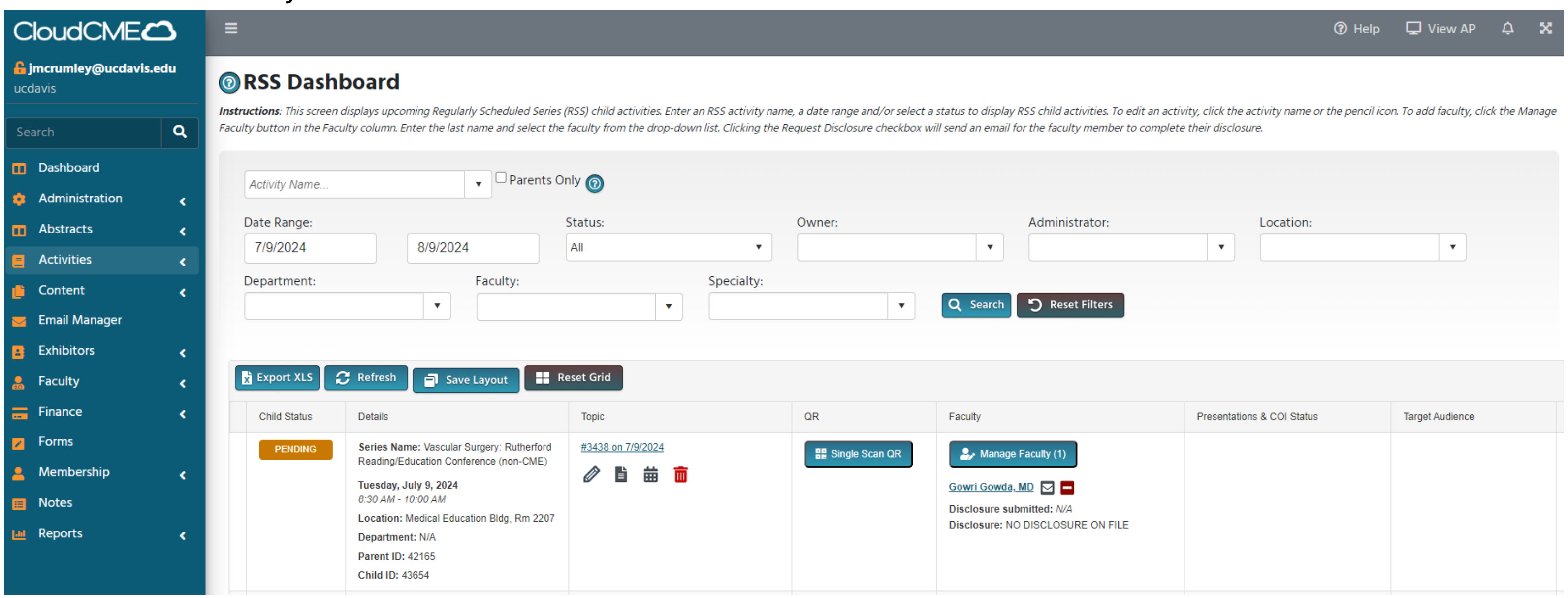
- This will take you to the backend/administrator side of CloudCME



3. Navigate to Activities -> RSS Dashboard



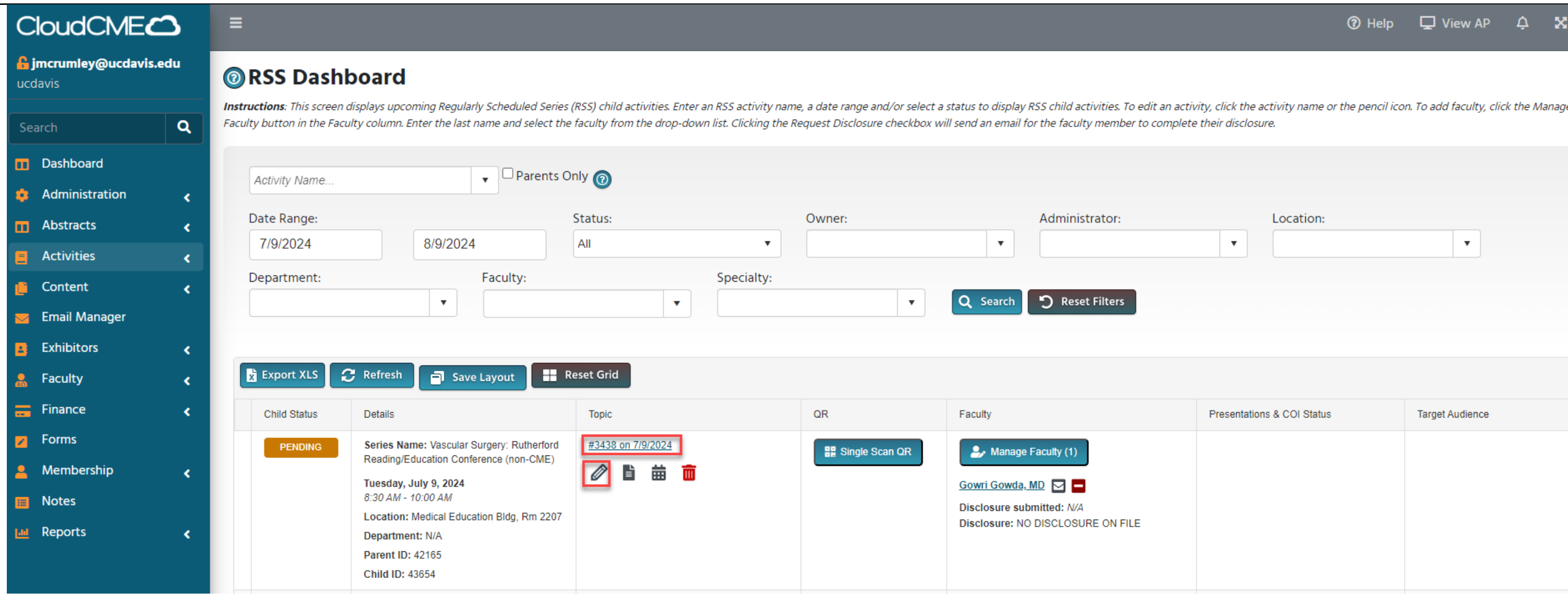
4. From the dashboard you can review the status of each child session



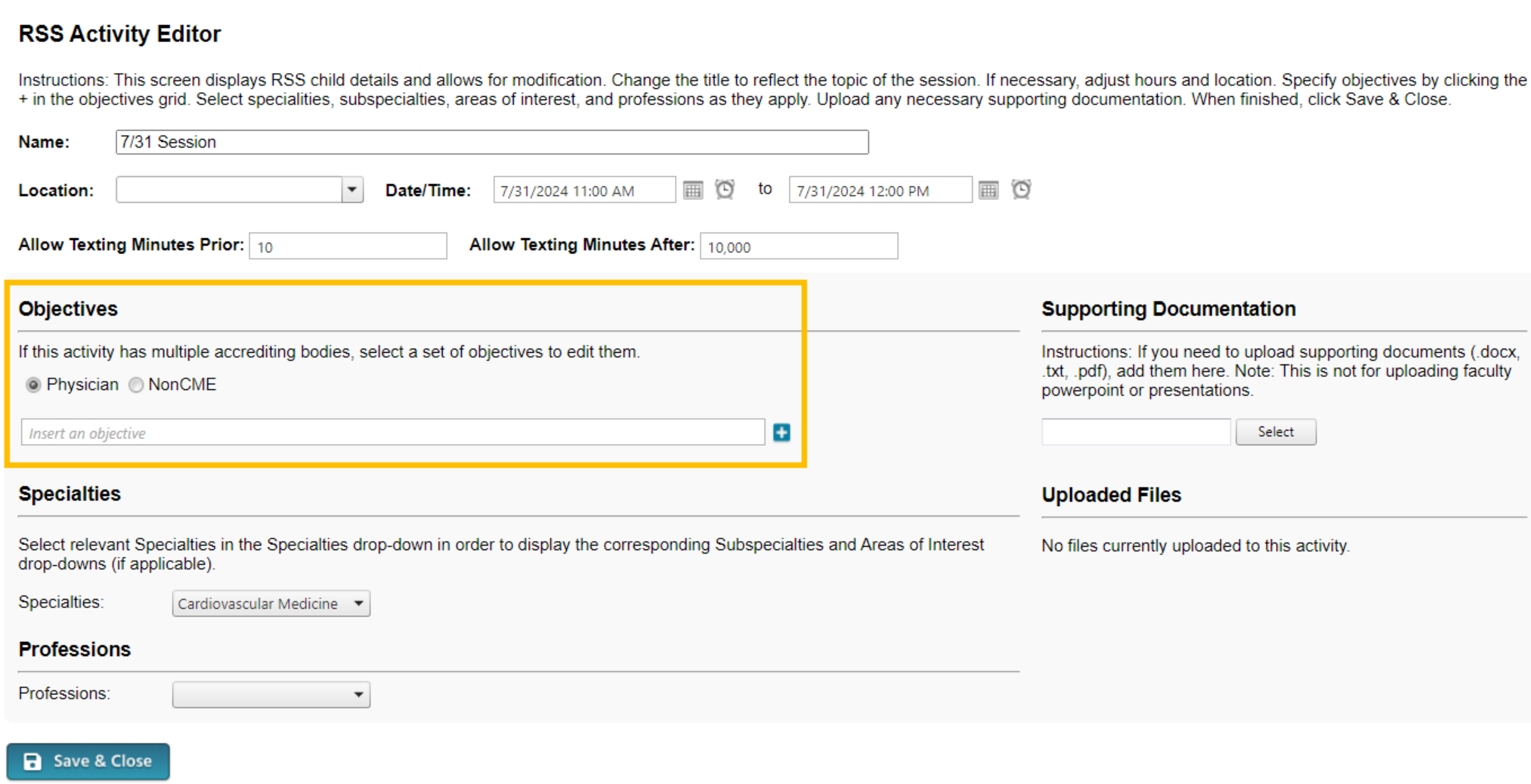
5. Status Definitions:

- 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 will remove this faculty member, select a new faculty member, and begin the process again.
2	Build Out Session	1. Click on the pencil icon to edit a session (DO NOT use the calendar function to edit your sessions) 2. Update Session Title (aka: Name) ○ Example: 'The Artificial Intelligence Landscape of Arrhythmia Management'



3. Enter the Session Objective(s) (Note: series objectives can only be edited by OCME)
    a. You can add more than one session objective by clicking on the '+' icon next to the objectives text box



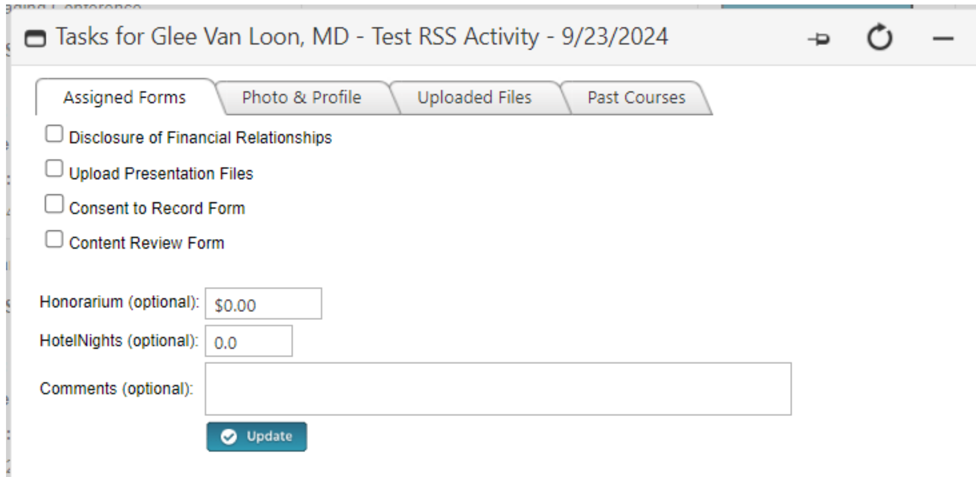
4. Check and edit the time and date for your session as needed.
5. Confirm texting time prior is 10 minutes and texting time after is 10,000 minutes. Do not edit these fields.
6. Click on the ‘Save & Close’ button to save your changes

For additional, new child sessions on the same day

1. Click on calendar icon
2. Double-click on the day
3. Select ‘Options’ from the pop-up window
4. Enter session name in the Subject text box
5. Deselect the ‘All day’ checkbox and specify time for the new session
6. Click on ‘Save’
7. The new session will appear on the RSS Dashboard

		8. Follow the preceding steps above to build out the session Notes: • Build only within the 6 month window of the sessions that were created for you • If you need to create a child beyond the 6 month window then you must ask OCME to create the child for you (otherwise the child sessions you create will be overwritten)
3	Manage Faculty & Presentations	1. Add all your faculty to your child session: a. click on the 'Manage Faculty' button  2. Enter name of faculty member a. Enter name in the top left text field (last name, first name) b. All faculty must have an account before they can be added to the faculty list. If your faculty member name does not appear in the selection list then you must: c. Create their account via Membership Manager i. select 'Add faculty' link from the CloudCME help page d. Or request that they create their account i. Refer to the 'Create Account' section of the CloudCME help page 3. Once faculty has been added you will be able to see if they have a disclosure on file: a. If your faculty member does not have a disclosure on file: you must notify your faculty to complete a disclosure on CloudCME. b. Refer to the 'Complete/Update Disclosure' link from the 'Faculty Tasks' section of the CloudCME help page. 4. Assign the presentation task to your faculty if CME has requested a presentation a. Under the Faculty column of the RSS Dashboard select the name of your speaker 

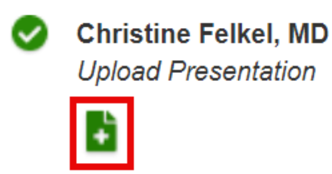
b. A new window will be displayed. Select the checkbox for ‘Upload Presentation Files’ and select the ‘Update’ button to save your changes



c. Your faculty will now have a presentation task assigned to them under their Faculty -> My Tasks menu. Refer to Faculty Tasks Guide for additional information.

OR

5. Upload a presentation on behalf of your faculty (if OCME has requested a presentation)
   a. Select the green document icon with the white ‘+’ symbol below the speaker’s name



   b. You will be asked to attest that the presentation does not contain PHI
   c. Select the checkbox to attest and click on the ‘Continue’ button

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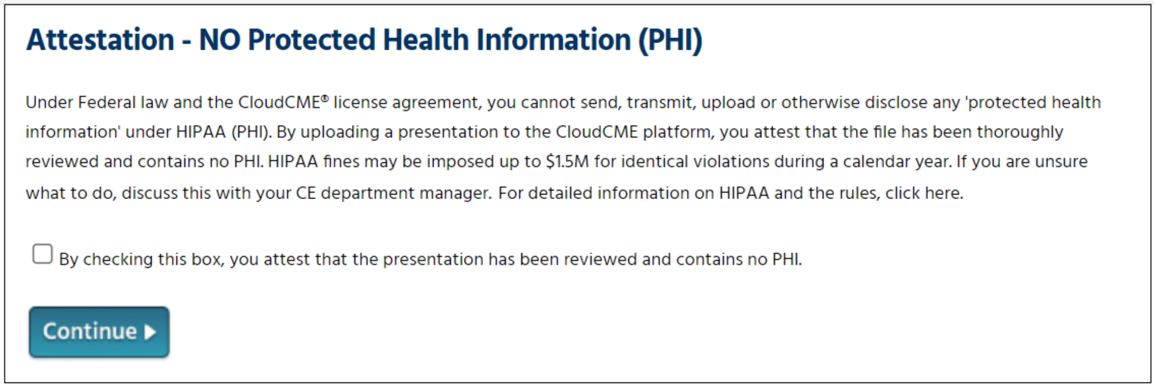
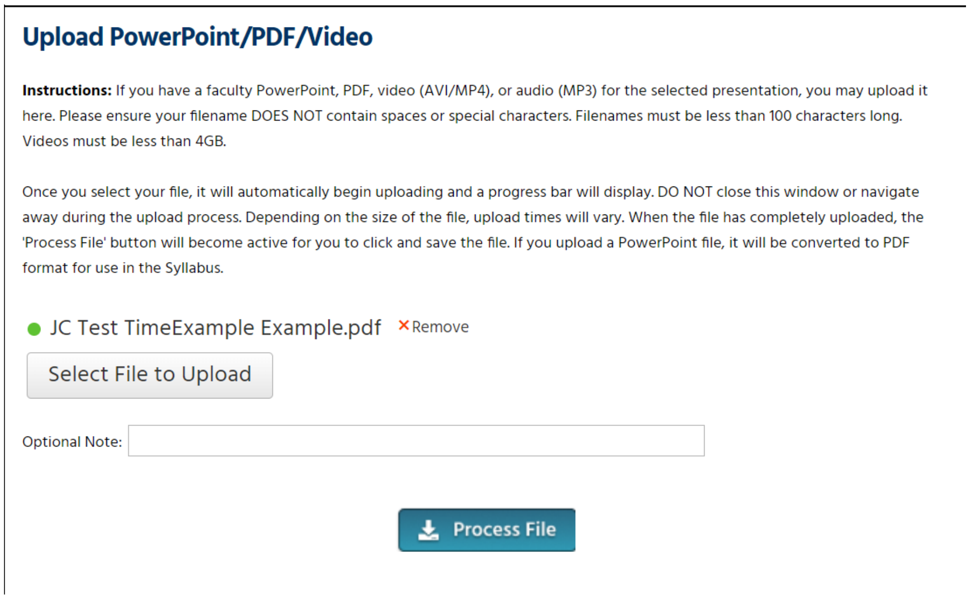
<tr><td></td><td></td><td>

d. Click on the ‘Select File to Upload’ button and navigate to the presentation file you are uploading
e. You may only upload the following file types: .ppt, .pptx, .pdf, .mp3



f. Click on the ‘Process File’ button to finish uploading</td></tr>
<tr><td>4</td><td>Build Agenda</td><td>Note: Activity will not be approved without an agenda
1. Navigate to the ‘Faculty’ menu and select ‘Build Agenda’</td></tr>
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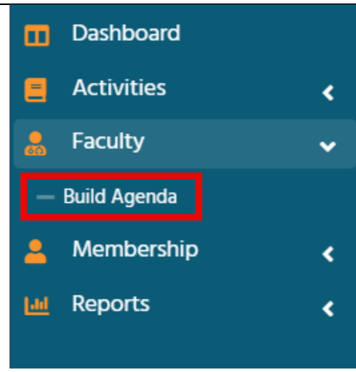
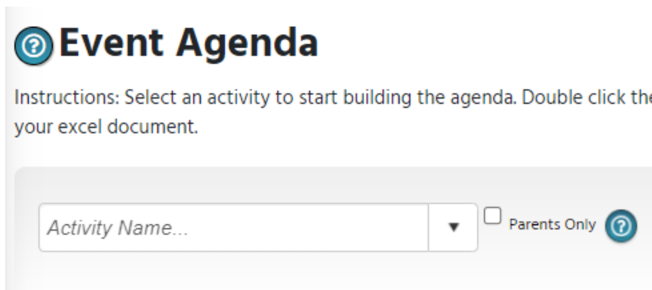
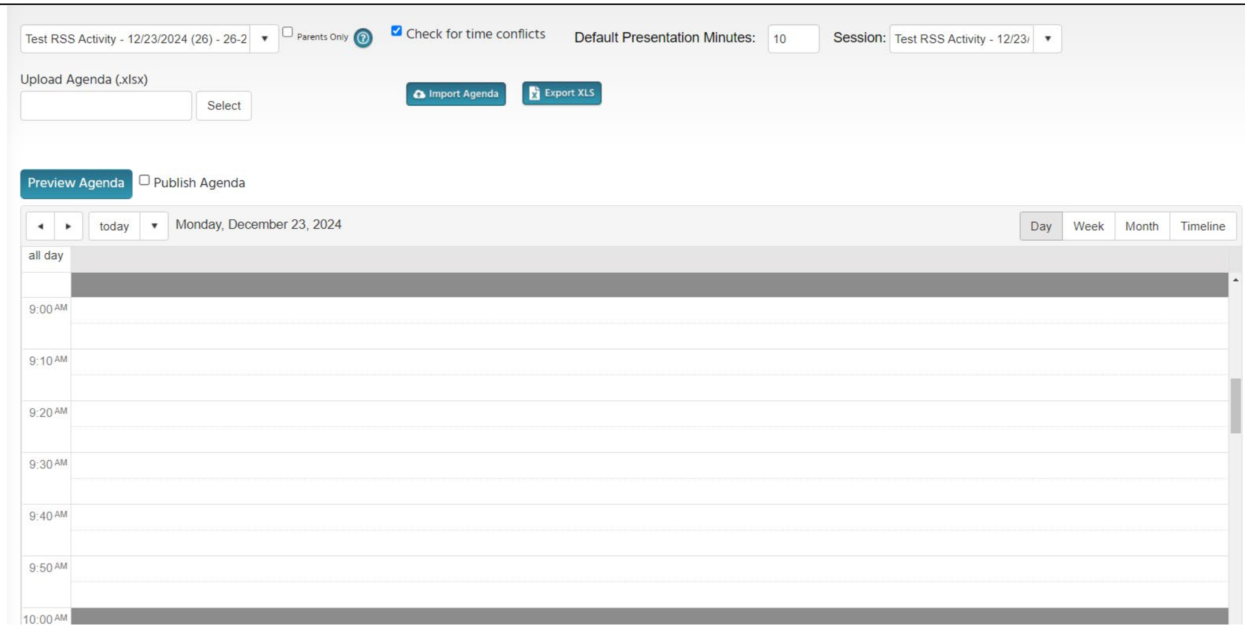
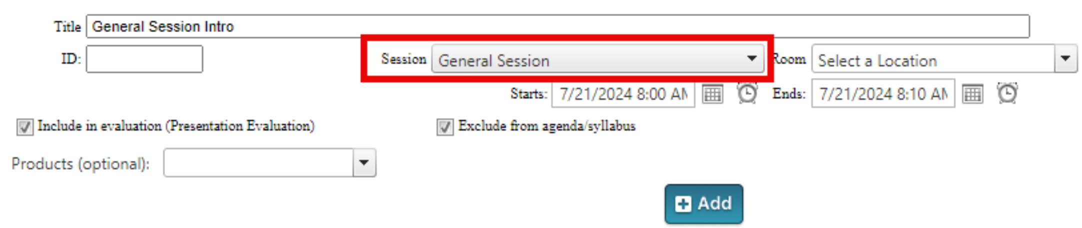
		 2. Enter your activity's name  3. On the agenda screen, navigate to the time slot you are adding an agenda for and double click on the start time block



4. A new window will pop up, where you can edit the following fields
    a. Title: enter a title for your presentation
        - Presentation names must include 'Meeting' in the title if that portion of time is non-CME
    b. If applicable, select a session from the 'Sessions' drop-down list



    c. Update the start and end times to reflect the time for your agenda item
    d. Unselect the checkbox for 'Include in evaluation', all RSS evaluations will already have speakers included
    e. DO NOT Select 'Exclude from agenda/syllabus'
    f. Click on the 'Add' button to save your changes
    g. In the 'Assign Faculty' tab select the faculty name from the 'All Speakers' drop-down list and click on the 'Apply' button

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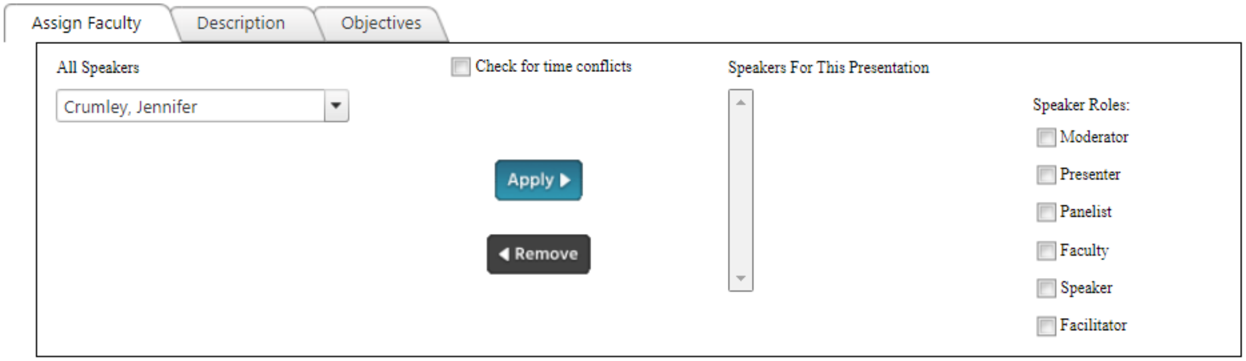
h. Under ‘Speakers for this Presentation’ heading select a name from the list then select checkbox next to the appropriate role for your faculty.


5. (Optional) Navigate to the ‘Description’ or ‘Objectives tab to enter a description and objectives for your agenda item. Follow on screen prompts on how to edit and save your changes.
6. When you are done editing your agenda, click on the ‘X’ button in the upper right corner of the window to exit
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<td>Generate Flyer</td>
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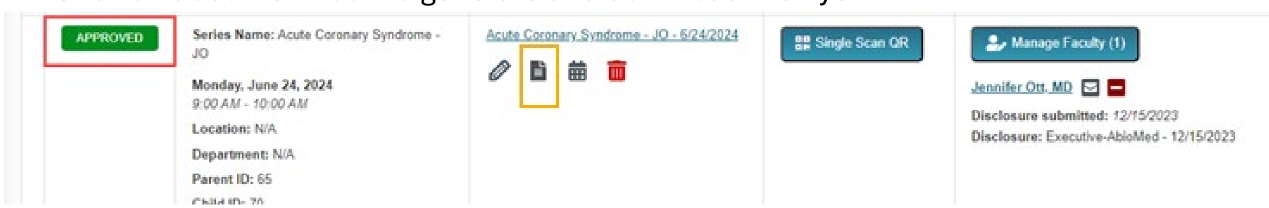
Do not generate a flyer until your activity has been approved.

1. Click on document icon to generate and download the flyer


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<td>6</td>
<td>Reports</td>
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These are the available reports to view and download:

Credits

The Credits report displays the continuing education credits awarded to users for a specific activity over a specified date range.
Shows professions and specialties

RSS Attendance History

The RSS Attendance History report provides data on Regularly Scheduled Series (RSS) attendance with attendance numbers.

Transcripts

The Transcripts report allows users the ability to generate transcripts based on various criteria and filters.

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<td>Record Attendance</td>
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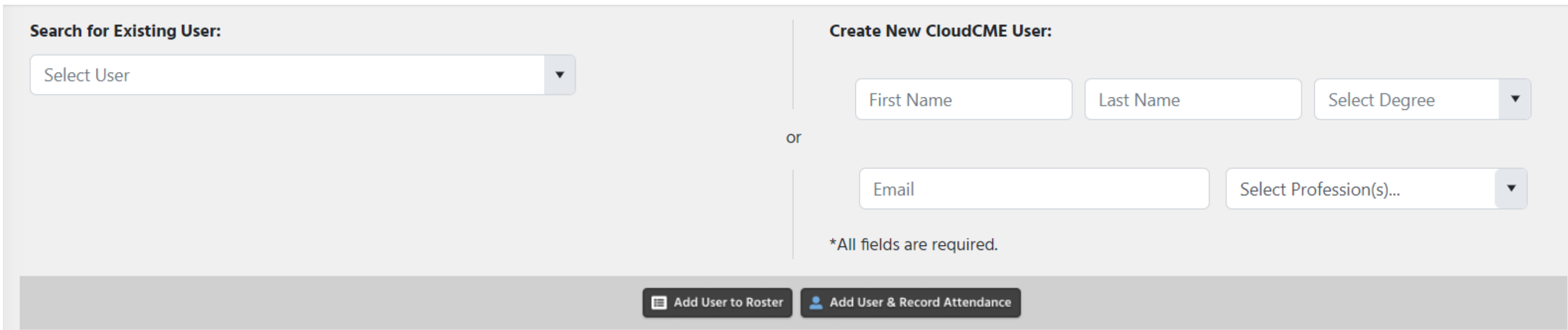
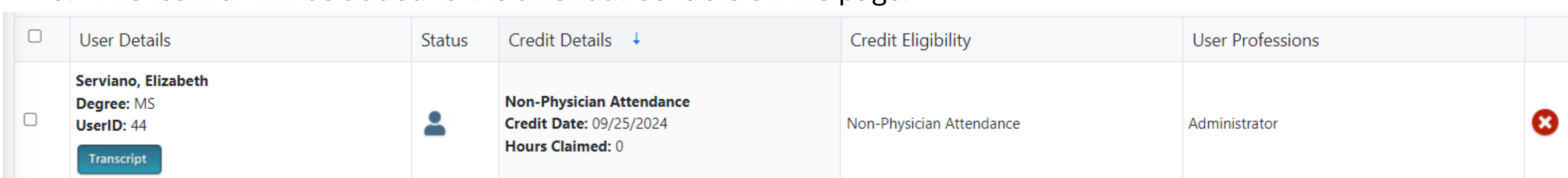
Navigate to the menu: **Activities -> Record Attendance**

1. Enter your activity name
2. You will be directed to the page where you can manually add attendance for an individual user.
3. Verify the activity displayed is your activity and select the ‘Add User’ button

4. Enter the name of the learner from the ‘Search for Existing User’ field. If the learner does not have a CloudCME profile you can create a basic account for them in the ‘Create New CloudCME User’ section:



5. Once you have entered a learner’s name or created their account select the ‘Add User & Record Attendance’ button.
6. The learner will be added to the attendance table on the page.



7. Notify the learner that they must still claim credit via the Attendee Portal.

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