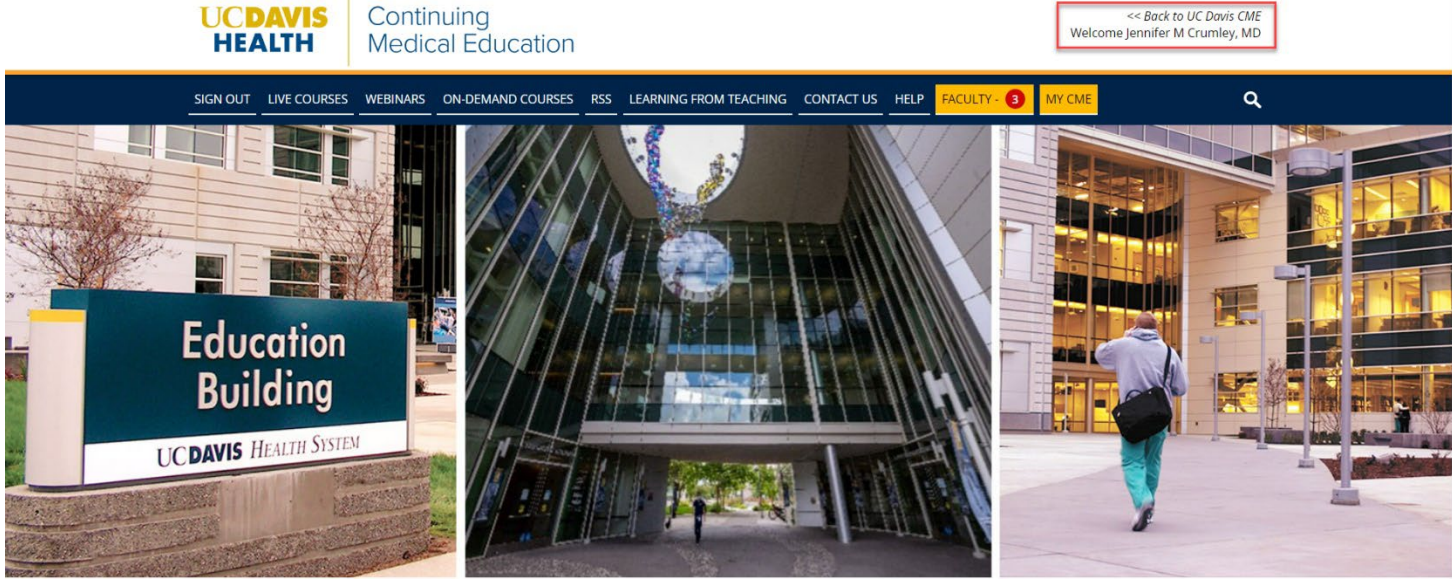


Step	Action
<p>1 View RSS Dashboard</p>	<p>1. Login at UCSD CloudCME website- https://ucdavis.cloud-cme.com/default.aspx</p> <ul style="list-style-type: none"> You'll know you've logged in as your name will show up in the top right corner  <p>2. Navigate to the bottom of the page and click on Administration</p> <div data-bbox="422 1097 1098 1438" style="background-color: #003366; color: white; padding: 10px;"> <p>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/</p> </div>

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

The screenshot displays the CloudCME administrator interface. On the left is a navigation sidebar with options like Dashboard, Activities, Faculty, Membership, and Reports. The main content area features a top navigation bar with user information and a date range selector. Below this are two rows of metric cards: Active Users (0), Logins (0), Credits Awarded (0), SMS Attendance (0), and QR Attendance (0) in the first row; and Disclosures (1468), Registrations (\$0.00), Paid Orders (0), Evaluations (0), and COI to Review (0) in the second row. The 'Participant Summary' section includes a donut chart showing the distribution of participants by state, with CA having the highest count at 10228. A 'Notifications' panel on the right contains a message about updates to post-test availability in the Attendee Portal.

Participant Summary - States

State	Count
CA	10228
NC	62
PA	57
NY	51
MA	25
TX	25
AL	24
OR	20
OH	19
KS	18
TX	25
AL	24
OR	20
OH	19
NC	62

Notifications

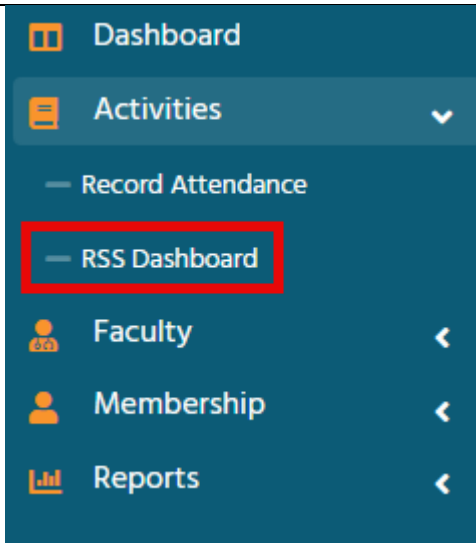
New update to Post-Test availability in the Attendee Portal

Dear Valued Customers,

We have changed the availability of post-tests for Live Courses/RSSs to ensure the post-test is completed only once attendance has been recorded. Prior to this change, users had access to the post-test before attendance was recorded which could prevent a user from accessing the evaluation or receiving MOC credit. As that is not ideal, this change will help to ensure the steps are completed in the necessary order to ensure the user has access to their evaluation and receives MOC credit (if applicable).

With this change, for any Live/RSS activity with a post-test, you will need to confirm users have attendance recorded. Note: recording attendance has always been a requirement for evaluations, we are just extending this requirement to post-tests as well as users who have not attended an activity should not have access to the post-test. Pre-tests will not be affected as some clients require a user to complete a pre-test before an event takes place.

3. Navigate to Activities -> RSS Dashboard



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

CloudCME
jmcumley@ucdavis.edu
ucdavis

RSS Dashboard

Instructions: This screen displays upcoming Regularly Scheduled Series (RSS) child activities. Enter an RSS activity name, a date range and/or select a status to display RSS child activities. To edit an activity, click the activity name or the pencil icon. To add faculty, click the Manage Faculty button in the Faculty column. Enter the last name and select the faculty from the drop-down list. Clicking the Request Disclosure checkbox will send an email for the faculty member to complete their disclosure.

Activity Name: Parents Only

Date Range: Status: Owner: Administrator: Location:

Department: Faculty: Specialty:

Child Status	Details	Topic	QR	Faculty	Presentations & COI Status	Target Audience
PENDING	Series Name: Vascular Surgery: Rutherford Reading/Education Conference (non-CME) Tuesday, July 9, 2024 8:30 AM - 10:00 AM Location: Medical Education Bldg, Rm 2207 Department: N/A Parent ID: 42165 Child ID: 43654	#3438 on 7/9/2024	<input type="button" value="Single Scan QR"/>	<input type="button" value="Manage Faculty (1)"/> Gowri Gowda, MD	Disclosure submitted: N/A Disclosure: NO DISCLOSURE ON FILE	

5. Status Definitions:

- INCOMPLETE – Coordinator action required

		<ul style="list-style-type: none"> ▪ 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 <ul style="list-style-type: none"> ▪ 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 <ul style="list-style-type: none"> ▪ 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 <ul style="list-style-type: none"> ▪ 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	<ol style="list-style-type: none"> 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) <ul style="list-style-type: none"> ○ Example: ‘The Artificial Intelligence Landscape of Arrhythmia Management’

- Dashboard
- Administration
- Abstracts
- Activities
- Content
- Email Manager
- Exhibitors
- Faculty
- Finance
- Forms
- Membership
- Notes
- Reports






RSS Dashboard

Instructions: This screen displays upcoming Regularly Scheduled Series (RSS) child activities. Enter an RSS activity name, a date range and/or select a status to display RSS child activities. To edit an activity, click the activity name or the pencil icon. To add faculty, click the Manage Faculty button in the Faculty column. Enter the last name and select the faculty from the drop-down list. Clicking the Request Disclosure checkbox will send an email for the faculty member to complete their disclosure.

Activity Name... Parents Only

Date Range: Status: Owner: Administrator: Location:

Department: Faculty: Specialty:

Child Status	Details	Topic	QR	Faculty	Presentations & COI Status	Target Audience
PENDING	<p>Series Name: Vascular Surgery: Rutherford Reading/Education Conference (non-CME)</p> <p>Tuesday, July 9, 2024 8:30 AM - 10:00 AM</p> <p>Location: Medical Education Bldg, Rm 2207</p> <p>Department: N/A</p> <p>Parent ID: 42165</p> <p>Child ID: 43654</p>	<p>#3438 on 7/9/2024</p> <p>  </p>	<p><input type="button" value="Single Scan QR"/></p>	<p><input type="button" value="Manage Faculty (1)"/></p> <p>Gowri Gowda, MD  </p> <p>Disclosure submitted: N/A</p> <p>Disclosure: NO DISCLOSURE ON FILE</p>		

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

RSS Activity Editor

Instructions: This screen displays RSS child details and allows for modification. Change the title to reflect the topic of the session. If necessary, adjust hours and location. Specify objectives by clicking the + in the objectives grid. Select specialties, subspecialties, areas of interest, and professions as they apply. Upload any necessary supporting documentation. When finished, click Save & Close.

Name:

Location: Date/Time: to

Allow Texting Minutes Prior: Allow Texting Minutes After:

Objectives

If this activity has multiple accrediting bodies, select a set of objectives to edit them.

Physician NonCME

Specialties

Select relevant Specialties in the Specialties drop-down in order to display the corresponding Subspecialties and Areas of Interest drop-downs (if applicable).

Specialties:

Professions

Professions:

Supporting Documentation

Instructions: If you need to upload supporting documents (.docx, .txt, .pdf), add them here. Note: This is not for uploading faculty powerpoint or presentations.


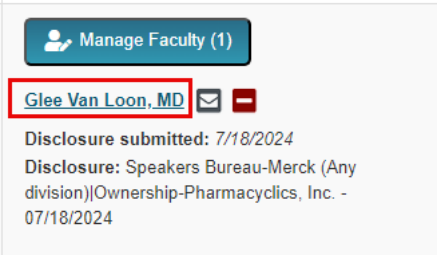
Uploaded Files

No files currently uploaded to this activity.

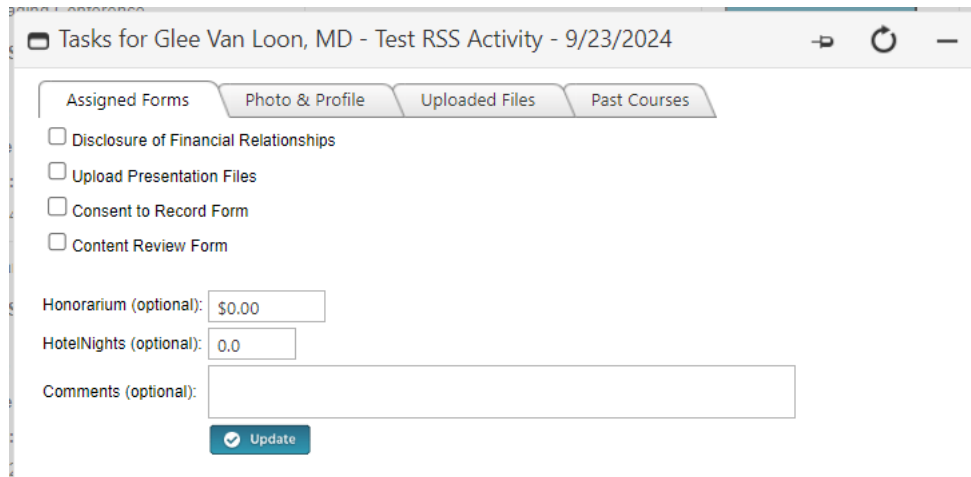
4. Check and edit the time and date for your session as needed.
5. Confirm texting time prior is 10 minutes and texting time after is 10,000 minutes. Do not edit these fields.
6. Click on the 'Save & Close' button to save your changes

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

		<p>8. Follow the preceding steps above to build out the session</p> <p>Notes:</p> <ul style="list-style-type: none"> • 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	<p>1. Add all your faculty to your child session:</p> <p>a. click on the ‘Manage Faculty’ button </p> <p>2. Enter name of faculty member</p> <p>a. Enter name in the top left text field (last name, first name)</p> <p>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:</p> <p>c. Create their account via Membership Manager</p> <p>i. select ‘Add faculty’ link from the CloudCME help page</p> <p>d. Or request that they create their account</p> <p>i. Refer to the ‘Create Account’ section of the CloudCME help page</p> <p>3. Once faculty has been added you will be able to see if they have a disclosure on file:</p> <p>a. If your faculty member does not have a disclosure on file: you must notify your faculty to complete a disclosure on CloudCME.</p> <p>b. Refer to the ‘Complete/Update Disclosure’ link from the ‘Faculty Tasks’ section of the CloudCME help page.</p> <p>4. Assign the presentation task to your faculty if CME has requested a presentation</p> <p>a. Under the Faculty column of the RSS Dashboard select the name of your speaker</p> <div data-bbox="470 1045 903 1299" style="border: 1px solid #ccc; padding: 10px; margin-top: 20px;">  </div>

- 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

 **Christine Felkel, MD**
Upload Presentation



- 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

Attestation - NO Protected Health Information (PHI)

Under Federal law and the CloudCME® license agreement, you cannot send, transmit, upload or otherwise disclose any 'protected health information' under HIPAA (PHI). By uploading a presentation to the CloudCME platform, you attest that the file has been thoroughly reviewed and contains no PHI. HIPAA fines may be imposed up to \$1.5M for identical violations during a calendar year. If you are unsure what to do, discuss this with your CE department manager. For detailed information on HIPAA and the rules, click here.

By checking this box, you attest that the presentation has been reviewed and contains no PHI.

Continue ▶

- 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

Upload PowerPoint/PDF/Video

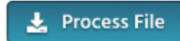
Instructions: If you have a faculty PowerPoint, PDF, video (AVI/MP4), or audio (MP3) for the selected presentation, you may upload it here. Please ensure your filename DOES NOT contain spaces or special characters. Filenames must be less than 100 characters long. Videos must be less than 4GB.

Once you select your file, it will automatically begin uploading and a progress bar will display. DO NOT close this window or navigate away during the upload process. Depending on the size of the file, upload times will vary. When the file has completely uploaded, the 'Process File' button will become active for you to click and save the file. If you upload a PowerPoint file, it will be converted to PDF format for use in the Syllabus.

● JC Test TimeExample Example.pdf ✕Remove

Select File to Upload

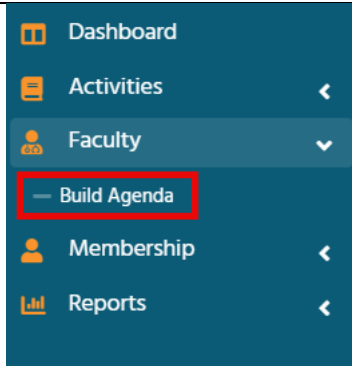
Optional Note:

 **Process File**

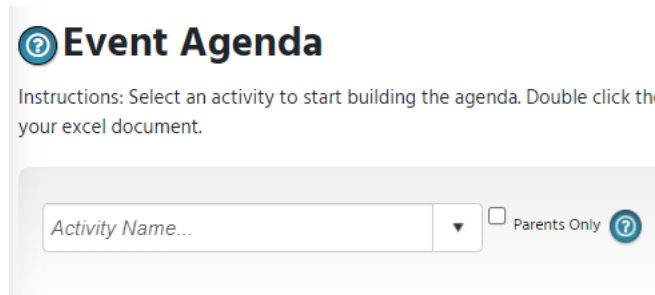
- f. Click on the 'Process File' button to finish uploading

4 Build Agenda

Note: Activity will not be approved without an agenda
1. Navigate to the 'Faculty' menu and select 'Build Agenda'



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

Test RSS Activity - 12/23/2024 (26) - 26-2 Parents Only Check for time conflicts Default Presentation Minutes: 10 Session: Test RSS Activity - 12/23

Upload Agenda (.xlsx)

Publish Agenda

Monday, December 23, 2024

all day

9:00 AM

9:10 AM

9:20 AM

9:30 AM

9:40 AM

9:50 AM

10:00 AM

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

Title:

ID:

Session: Room:

Starts: Ends:

Include in evaluation (Presentation Evaluation) Exclude from agenda/syllabus

Products (optional):

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

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

5 Generate Flyer

Do not generate a flyer until your activity has been approved.

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

6 Reports

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.

7

Record Attendance

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

JC Test Live Activity Conference (45991) - 09/25/2024 

Credit Types Available: AMA PRA Category 1 Credits™, Non-Physician Attendance

Attendance Recorded: 0 Total Users on Roster: 0

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:

Search for Existing User:

Select User



Create New CloudCME User:

First Name Last Name Select Degree

Email Select Profession(s)...

*All fields are required.

or

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.

<input type="checkbox"/>	User Details	Status	Credit Details ↓	Credit Eligibility	User Professions	
<input type="checkbox"/>	Serviano, Elizabeth Degree: MS UserID: 44 Transcript		Non-Physician Attendance Credit Date: 09/25/2024 Hours Claimed: 0	Non-Physician Attendance	Administrator	

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