



CME/GME Learning Management System Transition

Office of Continuing Medical Education
Training Session 3

CME/GME Learning Management System Transition

Training Session 3

- Introductions
- Housekeeping
 - Recordings of Training Sessions
 - Location of Recordings and PPTs
 - Q & A for Today's Session
- Audience Composition
- Train the Trainer Approach

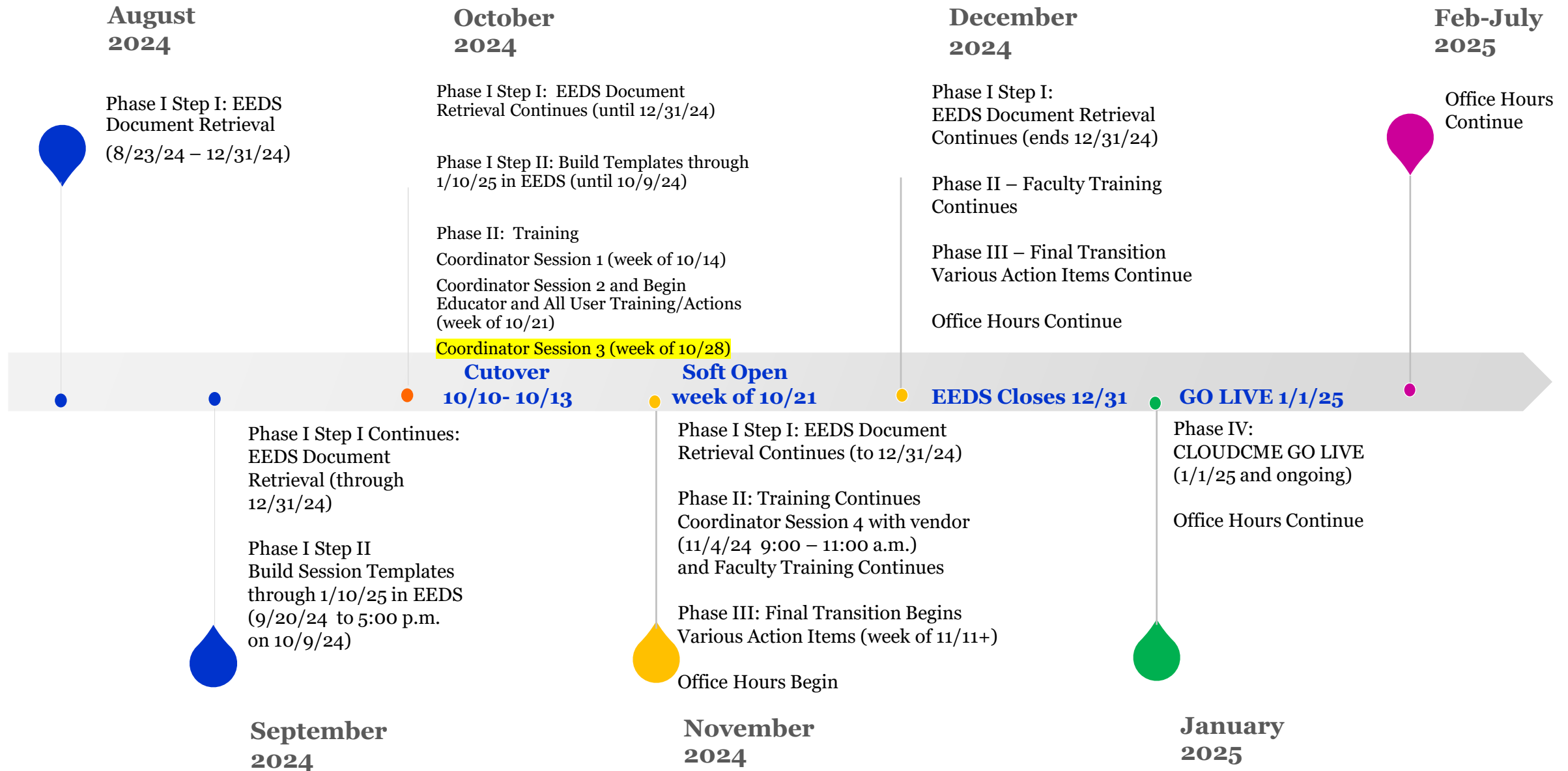
Communication Avenues

- OCME Guidance Emails
 - Timeline
 - Updated Checklist (emailed 10/14/24)
 - Slide deck for department use in training educators and learners emailed on 10/23/24
- FAQ Document
 - Posted and updated on CloudCME Help Page routinely
- Training Guides (on Help page)
- CloudCME Questions (not answered in Help Guides) & Technical Issues
 - Complete Request CloudCME Support Form to obtain assistance
 - 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
- Office Hours – beginning 11/5/24
- Emails from CloudCME

UC Davis Health - Office of C... External
University of California, Davis Health - Office of C...

8/27/2024

HealthStream-CloudCME Department Implementation/Transition Timeline



Checklist

Phase I Step I			
Completed	Start Date	Due Date	Action Item
<input type="checkbox"/>	8/23/24	12/31/24	Retrieve needed documentation out of EEDS
Phase I Step II			
Completed	Start Date	Due Date	Action Item
<input checked="" type="checkbox"/>	9/20/24	5:00 p.m. on 10/9/24	Create RSS session templates in EEDS for all activities through 1/10/2025 AND Delete any session templates already created beyond 1/10/2025
Phase II: Training			
Completed	Start Date	Due Date	Action Item
<input checked="" type="checkbox"/>	10/15/24	11:00 a.m. to 12:00 p.m.	Manager/Supervisor/Coordinator Training #1 (two options – select & attend one)
	10/16/24	2:00 p.m. to 3:00 p.m.	
<input type="checkbox"/>	10/21/24	Complete by 11/30/24	Departments train all internal UCD system users (MDs, Residents, Fellows, Clinicians, Coordinators, etc.) to update/enter profile, consent and submit AND Departments train all internal UCD Educators (Course Chairs, Planners, Speakers, Moderators, etc.) to complete disclosure form in CloudCME
<input checked="" type="checkbox"/>	10/22/24	11:00 a.m. to 12:00 p.m.	Manager/Supervisor/Coordinator Training #2 (two options – select & attend one)
	10/23/24	2:00 p.m. to 3:00 p.m.	
<input type="checkbox"/>	10/29/24	11:00 a.m. to 12:00 p.m.	Manager/Supervisor/Coordinator Training #3 (two options – select & attend one)
	10/30/24	2:00 p.m. to 3:00 p.m.	
<input type="checkbox"/>	11/4/2024	9:00 a.m. to 11:00 a.m.	Manager/Supervisor/Coordinator Training #4 with Vendor (one option only, 2 hours)
Phase III: Final Transition Items			
Completed	Start Date	Due Date	Action Item
<input type="checkbox"/>	10/16/24	No later than EOD 12/6/24	Departments finalize and submit all 2024 sessions in EEDS for approval from CME if credit requested. (Speakers with conflicts must have presentation uploaded)
<input type="checkbox"/>	11/5/24	All UCD learners to complete by 12/31/24	Departments train all learners on pairing mobile phone for texting attendance and downloading the CloudCME app for additional functionality



Phase III: Final Transition Items (Cont'd)			
Completed	Start Date	Due Date	Action Item
<input type="checkbox"/>	11/11/24	No later than EOD 12/13/24	Departments finalize Jan 2 through Jan 10, 2025 sessions in CloudCME for approval (all CME & GME courses). (Speakers for CME courses with conflicts must have presentation uploaded)
<input type="checkbox"/>	11/11/24	No later than 12/20/24	Departments train all UCD learners on actions to take when attending January 2025 CloudCME courses
<input type="checkbox"/>	12/13/24	Ready 5 days prior to activity date	Departments build sessions for Jan 11-June 30, 2025
PHASE IV – GO LIVE IN CLOUDCME 1/1/25			

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

CME/GME Learning Management System Transition

Training Session 3

- Objectives
 - Identify process for new RSS parent series requests
 - Explain how RSS parent series are managed in CloudCME
 - Distinguish new and similar processes when preparing RSS children activities

Regularly Scheduled Series System Features and Processes for Coordinators

For
CME and GME (Non-CME) Activities

Coordinator's First Sign-In to CloudCME

- **URL: <https://ucdavis.cloud-cme.com>**
- **Sign-in using Kerberos**
- **Complete Profile**
 - Upon sign in the system will direct new users to complete their profile (which includes consent)
 - MY CME tab also contains a Profile tab

Coordinator Administration Section in CloudCME

- Activities ▼
 - Record Attendance
 - RSS Dashboard
- Faculty ▼
 - Build Agenda
- Membership ▼
 - Add Member
- Reports ▼
 - Credits
 - RSS Attendance History
 - Transcripts

The screenshot displays four highlighted boxes on a background of colorful, overlapping circles:

- Course Consultation**: UC Davis, Health Employees Only
- Course Request Form**: UC Davis, Health Employees Only
- Educator Resources**
- Disclosure Form**: UC Davis, Health Employees Only

In the footer, a dropdown menu is highlighted with a red circle and a yellow arrow pointing to the **Administration** option. The footer also contains the text "UC Davis Health ©2023 The Regents of the University of California" and social media icons for Facebook, Twitter, YouTube, LinkedIn, and Instagram.

CloudCME Department Coordinator Administration Features

- Administration Link

- Activities

- Record Attendance – where department coordinator manually enters attendance after 5 days (use by exception only)
 - RSS Dashboard - where department coordinator build-out activities

- Faculty

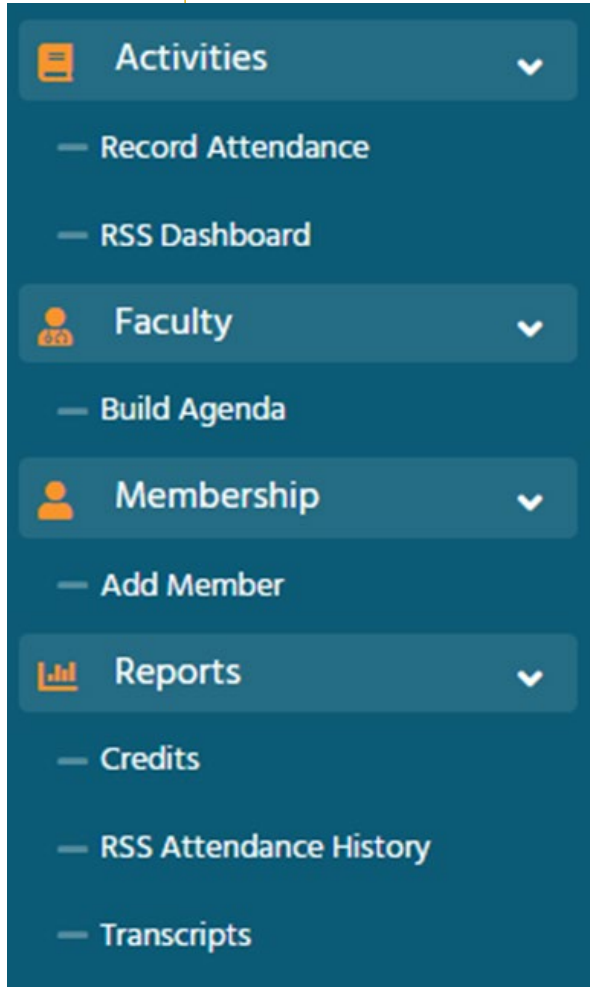
- Build Agenda – where department coordinator adds child activity specifics

- 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.)



Requests for New RSS Parent Series

New **CME** accredited RSS Parent Series = OCME Course Request Form

Same

New **GME** (Non-CME accredited) Parent Series = GME/Non-CME Course Request Form

Same

Current RSS Parent Series in CloudCME (Migrated from EEDS)

Existing Parent Series (CME accredited and GME/Non-CME) have migrated to CloudCME

OCME is reviewing and making corrections to parents

OCME creates and maintains Parent Series for changes/updates for both CME and GME Parents

Post-Course Evaluations:

All RSS CME activities will be setup with the OCME plus Speaker question

All RSS GME activities will be setup with “Course objectives met” plus Speaker questions

Changes to Parent Series should be communicated to OCME via the Support Request form on the CloudCME help page for both CME and GME Parents.

New!

Same

New!

Same

Child Activities

- OCME creates child activity templates
 - Child activity templates for activities between 1/1/25 & 1/10/25 can be updated beginning 11/11/24 by dept. coordinators
 - Child activity templates will be built by OCME and released to dept. coordinators 2X/year in increments
- Child activity evaluation
 - **CME** Child Activities – if a mandatory learn evaluation is needed or speaker questions need to be removed, submit change request via the Support Request form on the CloudCME Help page

New!

New!

Child Activities (continued)

- Departments edit & complete child activities
 - 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 approval

Same with slight edits*

Same for CME activities
New for GME activities!

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.

New!

- Look for Green Approved button

Child Activities (continued)

- 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

New!

Same for CME activities
New for GME activities!

New!

Same

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

Same

CME Child Activity = Same
GME Child Activity = N/A

Questions

Action Items

- Departments to train Educators and/or Learners on the following:
 - EEDS document retrieval (no later than 12/31)
 - Complete/Set Up Profiles with Consent (no later than 11/30)
 - Educator Disclosures (no later than 11/30)
 - Pairing Mobile Phone and Download CloudCME App (no later than 12/31/24)
 - Training on Ways to Claim Credit and prepare for attending Jan. activities (no later than 12/20/24)
 - * Additional item for Surgery
- Additional Action Items for Admin. Users
 - Submit all 2024 sessions (through 12/31) in EEDS (no later than 12/6/24)
 - Finalize 1/2/25 – 1/10/25 sessions in CloudCME for approval (begins 11/11 and completed no later than 12/13).

Next Session

- Demonstration of Coordinator Portal Including RSS Course Set Up