



Coordinators Training Manual for Regularly Scheduled Series (RSS)

December 2022

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V1 Draft – For Internal Use Only

Table of Contents

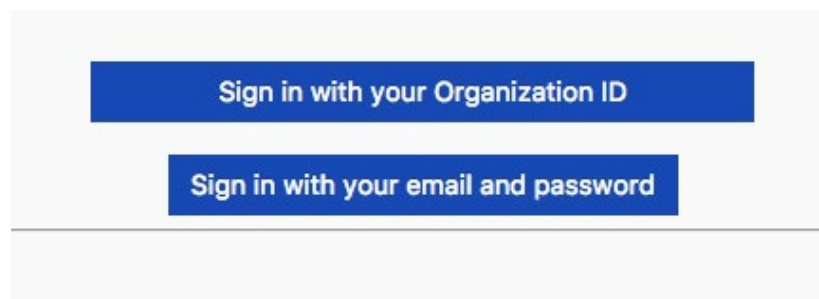
Table of Contents	2
RSS Dashboard Introduction.....	3
RSS Icons and Status Definitions	8
Using the RSS Dashboard	10
How to Claim Credit	12
SMS Texting	12
Claim Credit.....	14
UCSD CME RSS Resource Page	15

RSS Dashboard Introduction

CloudCME® offers the RSS Dashboard to users who want to easily manage RSS child activities. In the RSS Dashboard, users can view the child status, activity details, presentations and COI status, target audience, comments, and approval status. Users can also edit the activity, manage, and email Planners, Faculty, and Owners/Coordinators, upload and download presentations, override approval and generate flyers.

NOTE: If the RSS parent activity is a Case Conference (i.e. - tumor boards, M & M, etc.), and the “**Automatically Approve Case Conferences**” checkbox is checked in **Administration > Preferences > Miscellaneous**, the RSS parent and any child activities generated from the parent, *will be automatically approved*. Please see the [Setup](#)¹ article for additional information.

First, log into CloudCME® by clicking **Sign in with your Organization ID**, enter your email, password and click the **Login** button.



At the bottom of the screen, next to the drop-down box, click the **Administration** link.



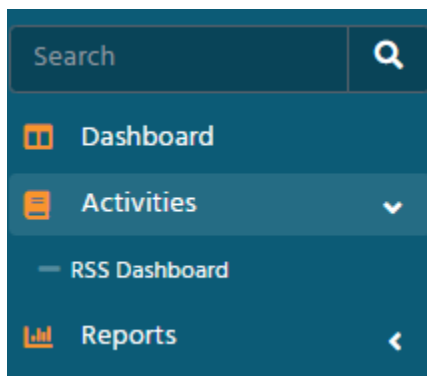
IMPORTANT NOTE: An Administrator must assign RSS Coordinators permission to use the RSS Dashboard via **Administration > User Screen Access**.

If you are unable to access your account, please contact the CME Office:
cmeaccreditation@health.ucsd.edu.

¹ Note: Log in to the CloudCME® Administration area before clicking the Help article links.

Then, from the main menu, go to **Activities > RSS Dashboard**.

NOTE: This screen may vary depending on your user screen access.



The **RSS Dashboard** will display.

The **RSS Dashboard** provides a minimized view to easily manage RSS activities. Coordinators will see all activities that they have been assigned to as Coordinator/Owner **except** those that are **Approved** (unless “**Approved**” is selected in the **Status** search).

There are a variety of ways to search the RSS Dashboard. Users can search by the activity name, **Date Range**, **Status**, **Owner**, **Administrator**, **Location**, **Department**, **Planner**, **Faculty** or **Specialty**. Click **Search** to display results in the Dashboard.

A screenshot of the RSS Dashboard interface. At the top is a search bar with 'Activity Name...' and a 'Parents Only' checkbox. Below are several filter fields: 'Date Range' with two date pickers (9/29/2022 and 10/29/2022), 'Status' with a dropdown menu (All), 'Owner', 'Administrator', 'Location', 'Department', 'Planner', 'Faculty', and 'Specialty', each with a dropdown menu. There are 'Search' and 'Reset Filters' buttons. Below the filters are 'Export XLS', 'Refresh', 'Save Layout', and 'Reset Grid' buttons. The main content is a table with columns: 'Child Status', 'Details', 'Topic', 'QR', 'Planners & COI Status', and 'Faculty'.

Child Status	Details	Topic	QR	Planners & COI Status	Faculty
IN REVIEW	Series Name: Cardiology Grand Rounds Friday, September 30, 2022 8:00 AM - 9:00 AM Location: N/A Department: N/A Parent ID: 986 Child ID: 1374	Cardiology Grand Rounds - 9/30/2022 ✎ 📄 📅 🗑️	Single Scan QR	Manage Planners (1) ✔️ Nicole Younce, MD (Activity Administrator) Disclosure submitted: 5/11/2022 Disclosure: Nothing to disclose - 05/11/2022	Manage Faculty (1) Angela Vassalle, MD, PhD ✉️ 🚫 Disclosure submitted: 9/23/2022 Disclosure: Consulting Fee-Oticon Medical Advisor-Abbott (Any division) (Relationship has ended) - 09/23/2022

RSS Dashboard Columns

The data table contains several columns to assist the Coordinator in managing the RSS activity planning process.

The following columns are included in the RSS Dashboard:

- 1. Child Status** - As the RSS child activity goes through the approval process, this column will continuously update the status to **Incomplete**, **Pending**, **Approved**, **Rejected** or **In Review**.



- In Review** - This status displays if faculty have been added with a completed disclosure and at least one financial relationship has been declared, triggering a COI Mitigation process needed. If one faculty member is rejected, and other faculty have been approved, the **Child Status** will remain **In Review**.

A **Review Disclosures** indicator will display in the **Status** column if a user has submitted a new Disclosure prior to the activity starting. There may be a new potential COI relationship that needs to be reviewed. Once the COI status has been addressed, the RSS status icon will update to the proper status and the indicator will be cleared.



Faculty Added After Approval - This indicator will appear in the **Status** column to notify Administrators that faculty members have been added to an activity after it has been approved. The status will automatically revert back to IN REVIEW.







- 2. Details** - This column will display the **Series Name**, the date and time of the child activity, **Location**, **Department**, **Parent ID** and **Child ID**.

Details
Series Name: Cardiology Grand Rounds
Friday, September 30, 2022 8:00 AM - 9:00 AM
Location: N/A
Department: N/A
Parent ID: 986
Child ID: 1374

- 3. Topic** - This column displays the name of the RSS child activity as well as the option to edit or create a flyer, view recurrence settings, and delete the activity.


Topic

[Cardiology Grand Rounds - 9/30/2022](#)


- 3. QR** - Single Scan QR is used for recording attendance by users logging in to the CloudCME® mobile app and tapping the Scan Attendance button.



QR



- 4. Faculty** - This column displays Faculty assigned to the RSS child activity. The Disclosure status will display beneath each faculty name along with their Disclosure submission date. If more than 3 faculty members are assigned to the child activity, there will be a **"View All"** link that when clicked, will expand to show all assigned Faculty, or roll up the listing view.

Faculty



[Angela Vassalle, MD, PhD](#)  

Disclosure submitted: 9/23/2022

Disclosure: Consulting Fee-Oticon Medical/Advisor-Abbott (Any division)
(Relationship has ended) - 09/23/2022

- Clicking the **Manage Faculty** button will display a pop-up screen that allows RSS Coordinators to email, view, add or remove Faculty, request disclosures and file uploads, and export faculty member information.
- To add a faculty member to the activity, type and select the member's name in the drop-down box. Click the **Add Faculty** button. The new faculty member will be added to the activity and the member's information will display in the **Manage Faculty** table.

Manage Faculty for Cardiology Grand Rounds - 9/30/2022 (1374)

  Request Disclosure? Request Presentation? 

	Full Name	Email	Disclosure Date	Disclosure	
<input type="checkbox"/>	Angela Vassalle, MD, PhD	avassalle@multiweb.com	9/23/2022	Consulting Fee-Oticon Medical/Advisor-Abbott (Any division) (Relationship has ended) - 09/23/2022	



- Click the faculty member's name to request Disclosures, presentation files and other optional information, edit a member's profile, and view uploaded files and past courses.

Assigned Forms Photo & Profile **Uploaded Files** Past Courses


Disclosure of Financial Relationships

Upload Presentation Files

Honorarium (optional):


HotelNights (optional):




Comments (optional):

 Update

- 5. Presentation & COI Status** - This column displays a faculty members' status, COI status, as well as icons to **Upload**, **Download** and **Remove** a faculty presentation. To upload a presentation, click the **Upload** icon, complete the Attestation, and select the file that will be uploaded. Once a file has been uploaded, the download and delete icons will display.

Presentations & COI Status

 **Angela Vassalle, MD, PhD**
 Professions and Degrees
 07 02 2020.pdf

- 6. Target Audience** - This column displays the **Specialties** and **Professions** that were selected during the parent activity setup. These can be revised on the **RSS Activity Editor** when the **Pencil** icon is selected.


Target Audience

Specialties

- Cardiovascular Disease

- 7. Owners/Coordinators** - This column displays the child activity Owners' and/or Coordinators' names as well as the option to send emails.

Owners / Coordinators

 Send



Owners:

- Ang Vass



RSS Icons and Status Definitions

The columns in the RSS Dashboard contain several icons:




The following icons (1-4) can be found in the **Topic** column:






1.  **Pencil** - This icon opens the **RSS Activity Editor**. Here, a user can edit the child activity information.
2.  **RSS Flyer** - The system will generate an RSS flyer for distribution. Faculty must be assigned to the activity before a flyer can be generated. The flyer template can also be customized for a unique RSS child or parent activity. The template can be applied to all child activities of the parent.
 - To associate the revised flyer to the RSS parent for use per each child activity of the parent, click the **Upload Flyer** button, select the revised flyer from your desktop, and check the **Use flyer/template for Parent?** checkbox.

NOTE: The RSS flyer will be saved in the **Documents** tab in **Activity Manager** for the RSS activity.



3.  **Calendar** - Click this icon to view and edit scheduled RSS child activities.
4.  **Trash** - Click this icon to deactivate/delete an RSS child activity. A pop-up window will display to confirmation deletion.

The following icons (1-8) can be found in the **Presentations & COI Status** column:

1.  **Incomplete** - This status represents Faculty where there is no disclosure on file, or their disclosure on file has expired. RSS Coordinators/Owners will see **Incomplete** by default until Faculty are assigned and disclosures have been completed.
2.  **Pending** - This status represents Faculty whose disclosure and presentation are currently undergoing the COI Mitigation process. The system will send an email to the Administrator and Owner, containing all RSS child activities in which the activity status has been changed to **Pending**.
3.  **Disclosure Updated** - This icon will display if a user has submitted a new disclosure prior to the activity starting. There may be a new COI that needs to be reviewed. Once the COI status has been addressed, this icon will update.

4.  **Approved** - This represents Faculty who have completed a disclosure, no financial relationships have been declared or, if identified, COI mitigation has been satisfactorily completed. The **Approved** status will also display if an Administrator or Activity Administrator conducts an Approval Override or if in **Administration > Preferences > COI Resolution** the "**Automatically Approve COI When Users Have Nothing to Disclose**" checkbox is checked.
5.  **Rejected** - This represents Faculty who have completed a disclosure, at least one financial relationship has been declared, and the conflict is deemed immitigable. The child activity status is then updated to **Rejected**. The Coordinator will remove this faculty member, select a **new** faculty member, and begin the process again.
6.  **Upload** - Upload a presentation file for the faculty member. Once a presentation has been uploaded, the download and delete icons will display.
7.  **Download** - Download a faculty member's presentation file.
8.  **Delete** - Delete a faculty member's presentation file.

The following icons (1,2) can be found in the **Faculty** column:

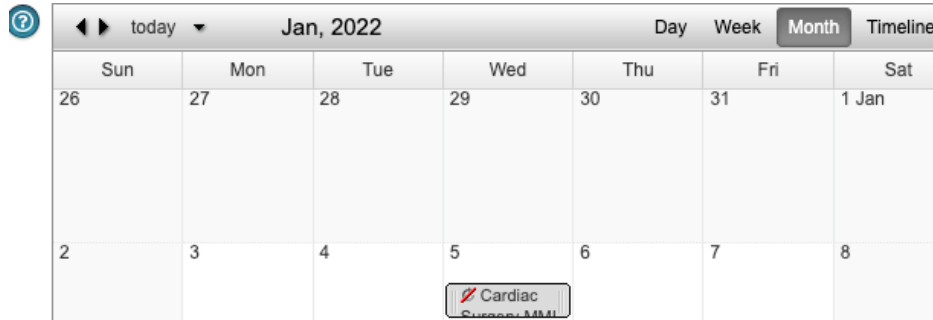
1.  **Email:** Draft and send an email to the selected Faculty Member/Planner.
2.  **Remove:** Remove a Faculty Member/Planner from the RSS child activity.

The following button can be found in the **Owners/Coordinators** column:

1.  Draft and send an email to Owners/Coordinators.

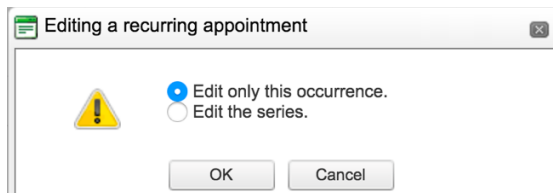
Using the RSS Dashboard

Click the calendar icon (📅) in the **Topic** column to display a pop-up window that will show a calendar with the recurrence dates of the child activities. To change the date of a child activity, users can drag and drop the child activity to a new day.

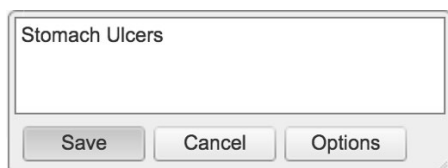


To edit a child activity, double-click on the activity in the calendar. A pop-up window will display. The radio button will default to **Edit only this occurrence**.

This option will only edit the child activity that was selected. To edit the entire series of child activities, select the **Edit the series** radio button. Click **OK**.



To edit the title of the child activity, type the new title into the textbox that will display. To revise the date or time the activity will occur, click the **Options** button.



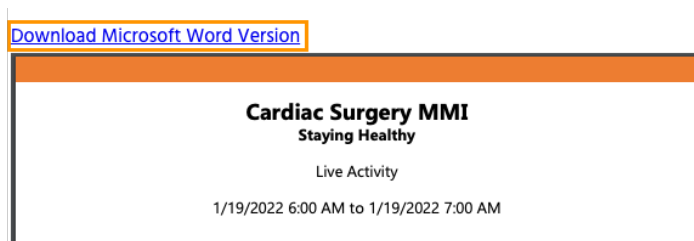
A new window will display. Here, users can create a child activity by filling in the text box, selecting the date and time the child activity will occur, and whether the activity have a recurrence.

Click the **Pencil** icon from the RSS Dashboard activity with the updated title. This icon can be found in the **Topic** column. The **RSS Activity Editor** screen will display. Here, users can edit and/or add additional information and upload supporting documentation for the child activity.

NOTE: The child activity title will display on users' transcripts.

When all information has been entered, click the **Save & Close** button.

To customize the RSS flyer, click the **RSS Flyer** icon (📄) and then click the **Download Microsoft Word Version** link. The flyer will open as a Word document. Make the desired changes and click **Save**.



NOTE: A list of merge fields that can be used in the RSS Flyer can be found here: [Document Merge Fields](#).²

To associate the revised flyer to the RSS parent for use per each child activity of the parent, click the **Upload Flyer** button, select the revised flyer from your desktop, and check the **Use flyer/templates for Parent?** checkbox. Then, click the **Save** button.

● Training Case (ACS) (1).docx × Remove

Upload Flyer

Save

Use flyer/template for Parent?

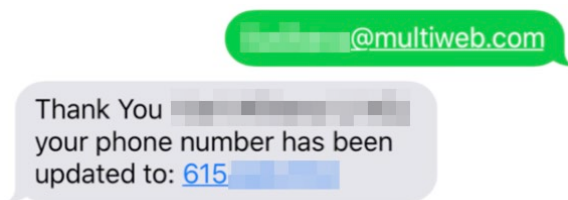
How to Claim Credit

SMS Texting

These instructions are intended only for users that have an active account in CloudCME®. Attendance can only be recorded 30 minutes prior to the meeting, during the activity, or 30 minutes after the meeting.

Step 1: First, users must pair their mobile phone to their account in CloudCME®. Text the email address associated with this account to, {Enter your organization's local exchange number}. A message will be sent that looks like the one below, confirming that the phone number has been updated.

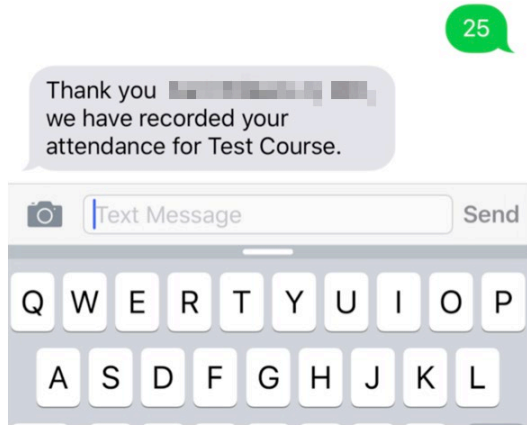
NOTE: This is a one-time operation.



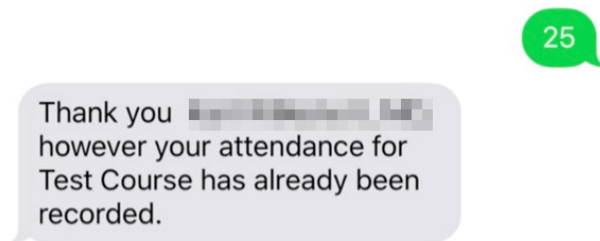
Step 2: To record attendance to an activity, text the activity ID or code that has been provided for the activity³. A message will be sent that verifies that activity attendance has been recorded.

² Note: Log in to the CloudCME® Administration area before clicking the Help article links.

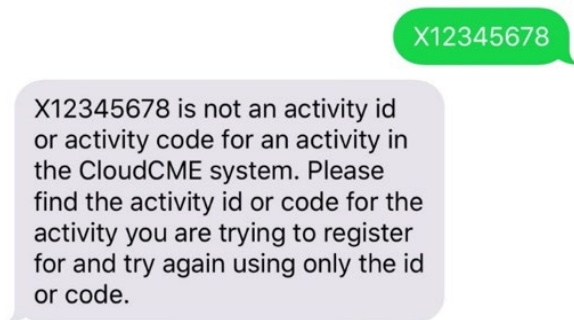
³ You must text an SMS text message not an iMessage, if using iOS.



NOTE: Attendance can only be recorded once to an activity. If a user tries to record attendance an additional time, they will receive the following message:



If a user attempts to use an activity code that does not exist, they will receive the following message:



Claim Credit

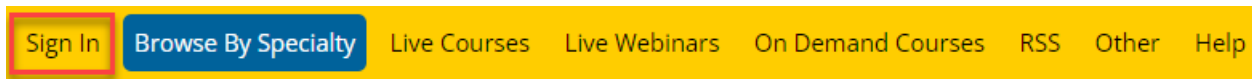
Users can claim credits for activities they attended but did not receive credit for in the Attendee Portal and in the CloudCME mobile app.

The instructions to self-claim credit are below:

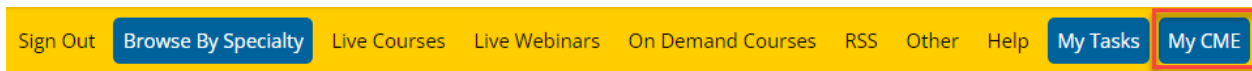
Via computer

Step 1: Go to: <https://ucsd.cloud-cme.com/>

Step 2: Click **Sign In**, and sign in using your email address and password.



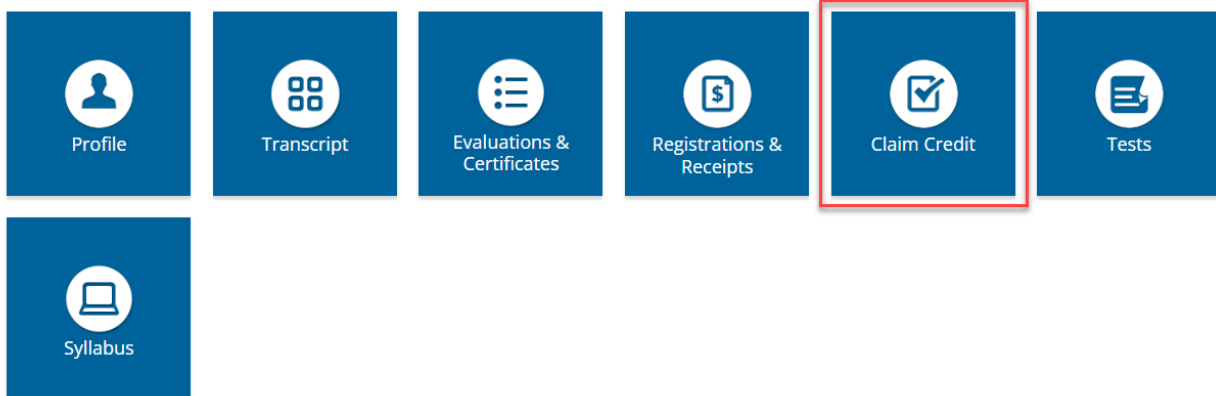
Step 3: Click the **My CME** button.



Step 4: Click the **Claim Credit** button.

MY CME

Instructions: Click a button to proceed.



Step 5: Enter the Activity ID and click the **Submit Activity ID** button.

CLAIM CREDIT

Self-Claim Credits

To claim credits for an activity, enter the Activity ID (number) below and click Verify Activity ID.

Please Enter the Activity ID (number): *

Submit Activity ID

Step 6: Complete any additional questions or fields.

Via CloudCME App

Step 1: Open the CloudCME App.

Step 2: Login using your email address and password.

Step 3: Select **Claim Credit** on the menu, if available.

Download Links

The CloudCME® mobile app can be downloaded for free from the app store. Log in using your organizational code: **ucsd** (this is the prefix for the CloudCME® portal url: **ucsd.cloud-cme.com**). Enter your CloudCME® login name and password. Both institutional Single Sign-On and non-Single Sign-On CloudCME® accounts are supported.

Apple iOS - <https://itunes.apple.com/us/app/cloudcme/id624053130?mt=8>

Google Android - <https://play.google.com/store/apps/details?id=com.multiweb.checkin>

Step 1: Download App

Step 2: Open the app, use organization code “ucsd”

Step 3: Click the **Login or Create Account** button.

Step 4: Login using your email address and password.

UCSD CME RSS Resource Page

For additional information, please visit our [RSS Resources Page](#).