



**Training Manual for
Regularly Scheduled Series (RSS) Coordinators**

<https://vumc.cloud-cme.com>

Updated February 2022

Overview and Deadlines

Your task for each session will be to collect and enter the following required information:

1. Session title/topic (if it varies)
2. Location (if it varies)
3. Date and time (if it varies)
4. Faculty (aka speakers) and their completed disclosure form(s)

Once you enter or verify the information, sessions will be reviewed and approved by the CME department. To ensure your session is approved in time for learners to text in and receive credit, please complete all of the above components *at least* 10 business days before the scheduled session begins.

If a session is not approved in time, learners will not be able to claim and receive credit for that session.

Beginning January 1, 2022

- All faculty disclosure forms are required to be completed and linked to the event no later than **10 business days** prior to the event.
- If our office requests the presentation for review, the finalized version of the presentation should be uploaded no later than **5 business days** prior to the meeting.
 - If changes to the presentation are needed, they should be uploaded no later than **3 business days** prior.

If you have not yet had the opportunity to review the new disclosure process, the following links will prove helpful:

- [SII Disclosure Training PPT](#)
- [SII Disclosure FAQ PPT](#)
- [SII Sample Faculty Letter](#)

Before you begin for the first time, make sure your profile is correct and complete:

1. Launch Google Chrome
2. Go to <https://vumc.cloud-cme.com>
3. Click **Sign In** then choose **VUMC Faculty and Staff**
4. Select **My CE** then **Profile**
5. Confirm information is correct and complete
 - a. Any missing required information will be highlighted in red
6. **Submit** at the bottom of the page to save

Use Google Chrome as a browser (rather than Internet Explorer, Safari, or Firefox)

Basic Site Navigation

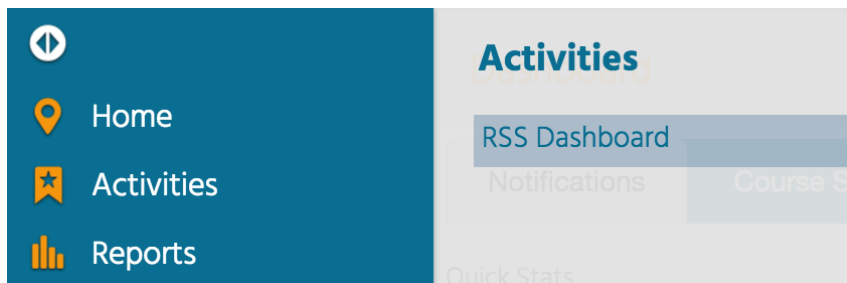
To navigate to the RSS Dashboard:

Go to <https://vumc.cloud-cme.com> and log in

Click on the word **Administration** in the lower left-hand side of the screen



Select **Activities** from the main menu and then **RSS Dashboard** from the sub-menu.



The RSS dashboard will require you to enter or verify 4 key pieces of information for each session:


1. Session title/topic
2. Location (if it varies)
3. Date and time (if it varies)
4. Faculty (aka speakers) and their completed disclosure form

| Child Status | Details | Topic | QR | Faculty | Presentations & |
|--------------|---|---------------------|----|--|-----------------|
| | Session Date and Location (these may not need) | Session Topic/Title | | Session Faculty (speakers, panelists, moderators, etc.) | |

Finding Your Activity and its Texting Code in the Dashboard

The RSS Dashboard provides a minimized view to easily manage RSS activities. You will see all of the sessions to which you have been assigned. By default, approved activities are hidden unless you select **Approved** in the Status search method.





You can search the dashboard by Activity Name (or texting code), date range, or status to easily find a particular activity. Click **Search** once name, date range, or status is selected.

Activity Name... Parents Only 

Date Range: Status: Owner:

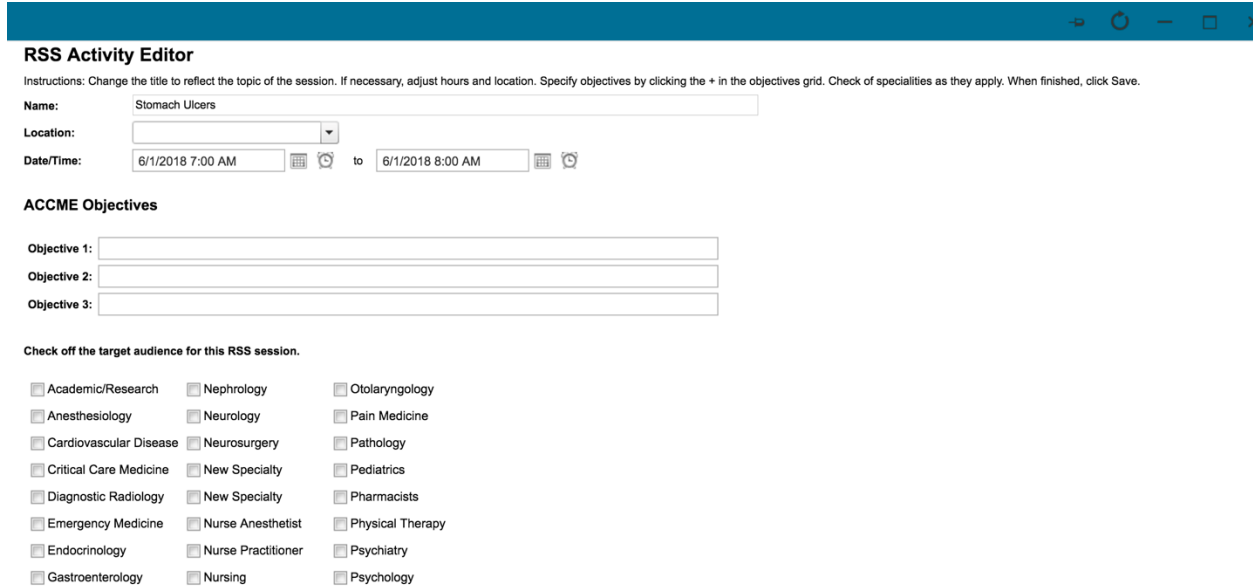
Department: Faculty: Specialty:

The texting code learners will use is the Child ID

| Child Status | Details | Topic |
|-----------------|---|---|
| APPROVED | <p>Series Name: Cardiothoracic Anesthesiology ECHO Conference - MOC Eligible 2022</p> <p>Monday, February 21, 2022 6:00 AM - 7:00 AM</p> <p>Location: Cardiology MCE NT - 5053</p> <p>Department: N/A</p> <p>Parent ID: 53360</p> <p>Child ID: 54671</p> | <p>Cardiothoracic Anesthesiology ECHO Conference - MOC Eligible 2022 - 2/21/2022</p> <p>   </p> |

Dashboard Editor – Adding Session Titles, Times, and Locations

Click the title of the activity from the RSS Dashboard, and a new screen will display allowing you to enter in the RSS session/child activity information into the system.

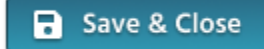


The screenshot shows the 'RSS Activity Editor' interface. At the top, there are navigation icons (back, refresh, close, and expand). Below the title, instructions state: 'Change the title to reflect the topic of the session. If necessary, adjust hours and location. Specify objectives by clicking the + in the objectives grid. Check of specialties as they apply. When finished, click Save.' The form includes a 'Name' field with 'Stomach Ulcers' entered, a 'Location' dropdown menu, and a 'Date/Time' field showing '6/1/2018 7:00 AM' to '6/1/2018 8:00 AM'. Below this is the 'ACCME Objectives' section with three empty text boxes for 'Objective 1:', 'Objective 2:', and 'Objective 3:'. A section titled 'Check off the target audience for this RSS session.' contains a grid of 15 checkboxes for various medical specialties: Academic/Research, Anesthesiology, Cardiovascular Disease, Critical Care Medicine, Diagnostic Radiology, Emergency Medicine, Endocrinology, Gastroenterology, Nephrology, Neurology, Neurosurgery, New Specialty, Nurse Anesthetist, Nurse Practitioner, Nursing, Otolaryngology, Pain Medicine, Pathology, Pediatrics, Pharmacists, Physical Therapy, Psychiatry, and Psychology.

Enter or verify the name of the RSS child activity title, location, date and time, and select the specialties that are the target audience for this activity. The objectives should remain the same for the entire series.






NOTE: The activity title will appear on users' transcripts exactly as you have entered it into the name field.

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





Moving a Session Using the Calendar

Click the calendar icon in the Topic column to open calendar mode:

| Child Status | Details | Topic | QR |
|--------------|--|--|---|
| APPROVED | <p>Series Name: Cardiothoracic Anesthesiology ECHO Conference - MOC Eligible 2022</p> <p>Monday, February 21, 2022 6:00 AM - 7:00 AM</p> <p>Location: Cardiology MCE NT - 5053</p> <p>Department: N/A</p> <p>Parent ID: 53360</p> <p>Child ID: 54671</p> | <p>Cardiothoracic Anesthesiology ECHO Conference - MOC Eligible 2022 - 2/21/2022</p> <p>   </p> |  |

Once in calendar mode you can:

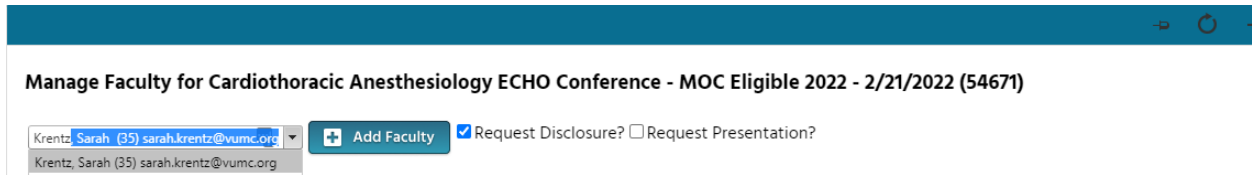
- Drag and drop an RSS date quickly to a new date
- Delete a session (hold your mouse over the session and click the red x)
- Add an additional instance by double-clicking any available date.

| May, 2018 | | | | | | | Day | Week | Month | Timeline |
|-----------|-----|---|-----|-----|-------|-----|-----|------|---|----------|
| Sun | Mon | Tue | Wed | Thu | Fri | Sat | | | | |
| 29 | 30 | 1 May | 2 | 3 | 4 | 5 | | | | |
| | |  | | | | | | | | |
| 6 | 7 | 8 | 9 | 10 | 11 | 12 | | | | |
| 13 | 14 | 15 | 16 | 17 | 18 | 19 | | | | |
| 20 | 21 | 22 | 23 | 24 | 25 | 26 | | | | |
| 27 | 28 | 29 | 30 | 31 | 1 Jun | 2 | | |  | |

Adding faculty (speakers, panelists, moderators, etc.) for an RSS session

To add faculty:

- In the Faculty column, select *Manage Faculty*.
- Make sure *Request Disclosure?* is selected and *Request Presentation?* is not.
- Type in the first few letters of the faculty member's last name and select them from the drop-down list then click the + *Add Faculty button*.



You will see that the faculty member has been added to the child activity.

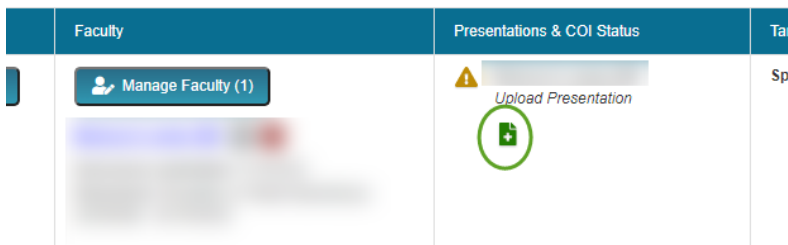
Session Status and Approval:

If the faculty member declares that they have no financial relationships on their disclosure form, the status will update to Pending and the RSS child activity is ready to be marked as Approved by CME Office. Once approved, its status will change to APPROVED.

If the faculty member declared a financial relationship, this will be noted in the Presentation & COI Status column and the session's status will update from INCOMPLETE to IN REVIEW. In this case, it will be reviewed by the CME Office and either be APPROVED or in some cases you will receive an email instructing you to obtain and upload the faculty member's presentation (PPTX, PPT, or PDF).

Unless contacted by someone in the CME Office, you do not need to obtain and upload presentation files into CloudCME. Note that faculty will frequently see a prompt to upload their presentation when they log in, even when it is not required.

When contacted by the CME Office, click the upload icon in the Presentations & COI Status column to upload the faculty member's presentation for review.



Once the faculty member's presentation has been uploaded, it will be reviewed by the CME Office and the session will either be APPROVED or you will be contacted with further instructions.

Add New User (faculty)

If an upcoming faculty does not have a profile in Cloud, they will need one before you can add them to a session. You can either add them administratively (you will need at least the information in the list below) OR you can instruct them to create a profile themselves and then add them to a session once complete.

Add New User - Administrative

If you need to add someone not in the system, go to *Membership – Add Member*.

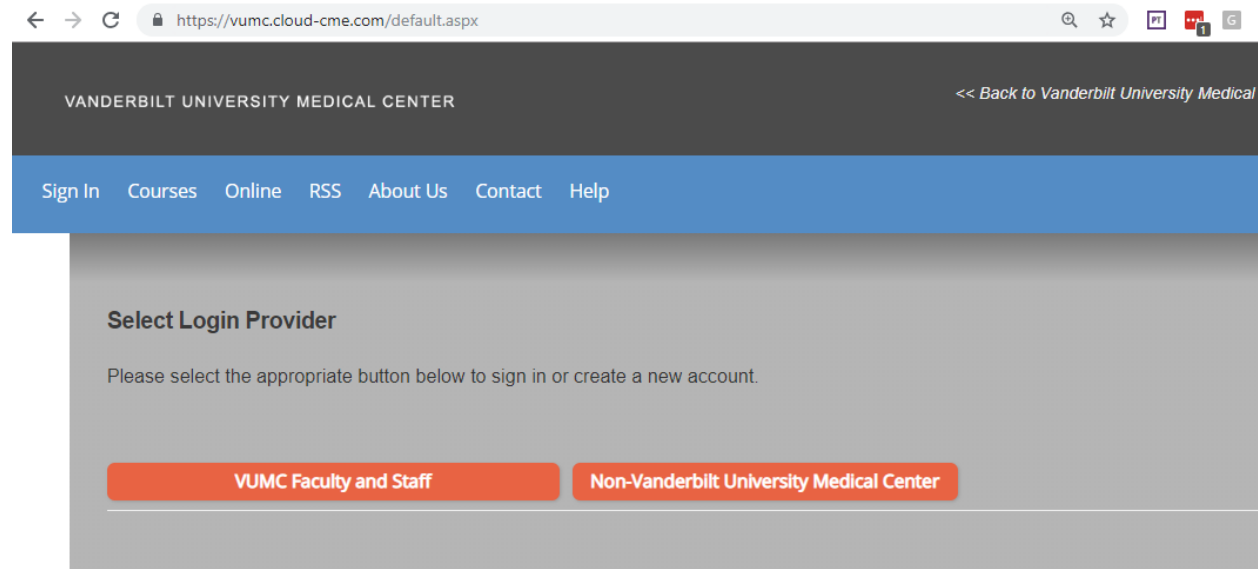
This form has many fields. While complete information is highly desired, here are the minimum required fields:

- First Name
- Last Name
- Degree (used to confirm credit eligibility)
- Organization
- Email
- Department
- Credit eligibility

Fill out this form and click *Add* at the bottom of the screen to add a user.

Add New User – Self Service

If you are not logged into the portal, you will see two buttons when you click *Sign In* – one for VUMC faculty/staff and one for Non-VUMC. End users, including your speakers, can click the appropriate button and complete a form to create their own account.



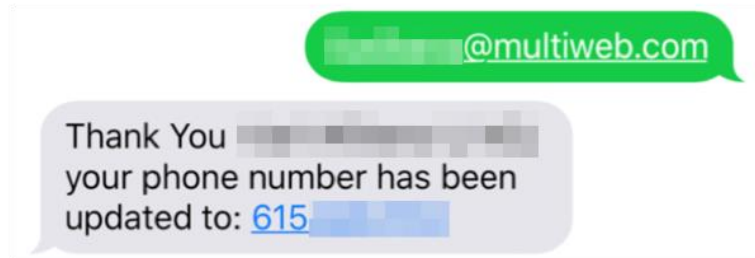
Assisting Your Learners

SMS Texting for Attendance

These instructions assume that your users have an active account in CloudCME®. If they do not have an account, instruct them to click Sign In then the appropriate VUMC or non-VUMC button to begin a profile.

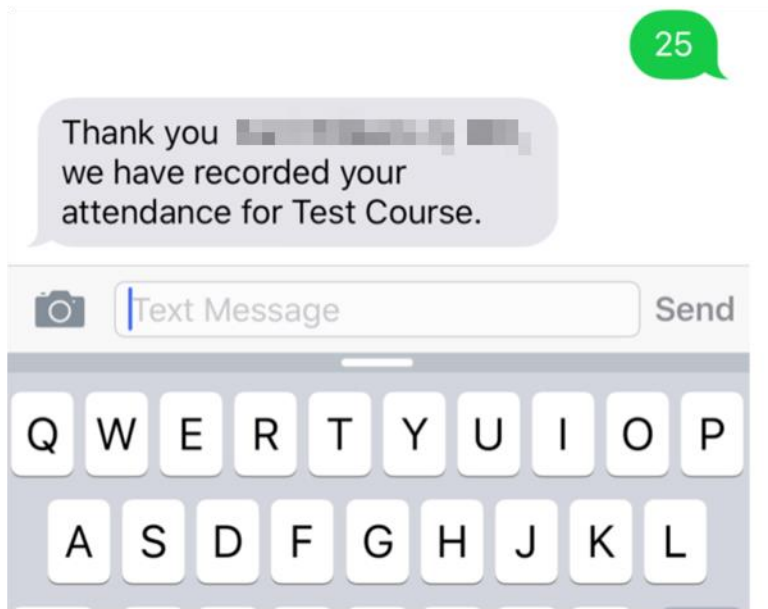
Learners must pair their mobile device with their profile (one time)

First, a learner must pair their mobile phone to your account. They should text their email address, exactly as it appears in their profile to 855-776-6263. They will receive a message that looks like the one below. This is a one-time operation.

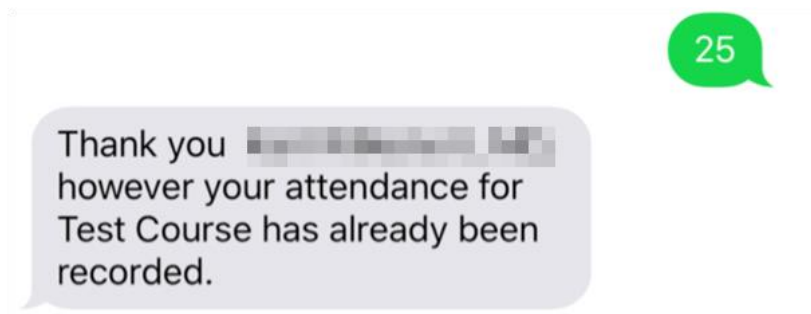


Text an Activity ID to the system

To record your attendance to an activity, text the activity ID that has been provided for your activity to 855-776-6263. You will receive a message back that verifies your activity attendance has been recorded.



NOTE: You can only record attendance once to an activity. If you try to record your attendance an additional time, you will receive the following message.



Credit awarding is instant and users can login to the attendee portal, click the My CE\My CME button, then select transcripts, and view the activity, credit and date on their transcript. They can download or email that transcript to anyone themselves.

Glossary of Dashboard Definitions:

- **Child Status** - This column contains a status icon. As the planning process continues through the approval state, the icon displayed in this column will continue to update. Please refer to the RSS Status Definitions below for a description of each status meaning.

- **Details** – This column displays various details about the series and session including location, text code (Child ID), time, and date.



- **Flyer Icon** - Click this icon and the system will automatically generate the activity handout for distribution or display.
- **Topic column** - Click the session's title in this column to edit the title, date, location, and any other applicable details. Supporting documentation files can also be uploaded here as needed.




- **Calendar icon** - Click this icon and the calendar will display for you to view the scheduled RSS child activities.



- **Trash can icon** - Click this icon to deactivate an RSS child activity.

- **Faculty column** - This column contains 3 icons for your use:

-  **Manage Faculty icon** – opens a pop up to add faculty as well as assign disclosure and presentation upload tasks. Note that the Request Disclosure button should be selected but the Request Presentation should not. To add faculty, search by *Last Name*, *First Name*.

 Add Faculty Request Disclosure? Request Presentation?

Once a user has been added as a faculty member, two additional icons display.



- **Envelope icon** - Click this icon and a pop-up window will display for you to create an email message to send to the faculty member. You can email both coordinators and faculty. When an email is sent, the system will record this action and place a note in the notes section.



- **Red minus icon** - Click this icon to remove a faculty member from the RSS child activity.



- **Upload Presentation column** - An icon displays in this column when one or more faculty have disclosed a financial relationship in the disclosure form. Note that a presentation is not necessarily required in this case. The CME office checks upcoming sessions daily and will reach out in the cases where a presentation upload is required.
- In the ID column, the Child ID number is the texting code learners will use. Note that it may only have 3 digits.

RSS Status Definitions

Incomplete: This status means that faculty and disclosure have not been assigned yet. You will see Incomplete by default until faculty have been assigned and disclosures have been completed. This is the initial default status of every RSS child activity.

Pending: This status represents faculty who have completed a disclosure and there was no Conflict of Interest (COI) disclosed (i.e. nothing was disclosed or COI was resolved). It is pending approval by the CME office.

In Review: This status represents faculty who have a completed disclosure and a potential Conflict of Interest has been noted. The CME office checks this status daily and will reach out in the cases where a presentation upload is required.

Approved: This represents faculty who have completed a disclosure, either no conflict of interest identified or, if identified, resolution of conflict of interest has been satisfactorily completed. This is ready for learners to text in and receive credit.

Rejected: This represents faculty who have completed a disclosure, a conflict of interest has been identified and the conflict of interest is not able to be satisfactorily resolved. The activity is rejected. You would remove this faculty member and would need to select a new faculty member and begin the process again. This status should rarely be seen.