RSS CME Associate Training Manual

Updated June 2025

Questions not covered in this manual?

Contact OCPD at cme@vumc.org

Overview of Responsibilities

As an RSS CME Associate (CMEA) (sometimes called an RSS Coordinator or Owner), you are responsible for the day-to-day management of your Regularly Scheduled Series (RSS) to ensure VUMC stays compliant with our accrediting body, the ACCME. This includes managing your sessions from the RSS Dashboard, coordinating with staff and faculty for disclosure forms and other required paperwork, and assisting your learners in claiming their credits when needed.

Your task for *each* session is to collect and enter the required information below into CloudCME. Unused sessions *must* be deleted.

1. Session **title/topic** Location (if it varies)
2. Date and time (if it varies)
3. Faculty (aka speakers and moderators) **and** their completed disclosure form(s)
    a) Presentation files (*only* when requested)

Deadlines and Disclosure Forms

Once you enter or verify the information above, sessions will be reviewed and approved by the Office for Continuous Professional Development (CPD Office). The deadlines below are necessary for our CPD Office to efficiently manage 300+ different series each calendar year.

All Faculty (Activity Directors, Speakers, Moderators, etc.), Planners, and CME Associates are required to have a disclosure form on file in CloudCME. The form must be less than 12 months old and updated whenever it either expires or when a potential conflict of interest changes. Each person must complete and sign their own disclosure form.

To complete the form, log in at **https://vumc.cloud-cme.com** and select ***Disclosure Form*** from the bottom right.

- All disclosure forms for the activity must be submitted through CloudCME **no later than 10 business days** prior to the session date.
- If the CPD Office requests speaker presentations, they must be submitted **no later than 5 business days** prior to the session date.

Sessions with disclosure forms and/or requested presentations submitted outside of these deadlines will not be approved. If a session is not approved, learners will not be able to claim and receive credit for that session.

Getting Started

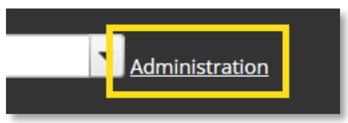
Before you begin for the first time, make sure your CloudCME profile is correct and complete:

- Launch Google Chrome (rather than Internet Explorer, Safari, or Firefox) and go to **https://vumc.cloud-cme.com**
- Click ***Sign In*** then choose ***VUMC Faculty and Staff***
- Select ***MyCE*** then ***Profile*** and confirm all information is correct and complete
    - Any missing required information will be highlighted in red, feel free to skip non-required fields
- ***Submit*** at the bottom of the page to save

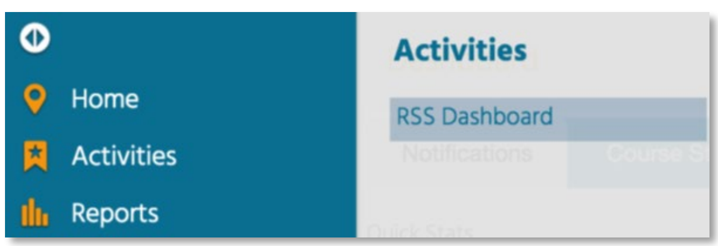
The Basics

Site Navigation

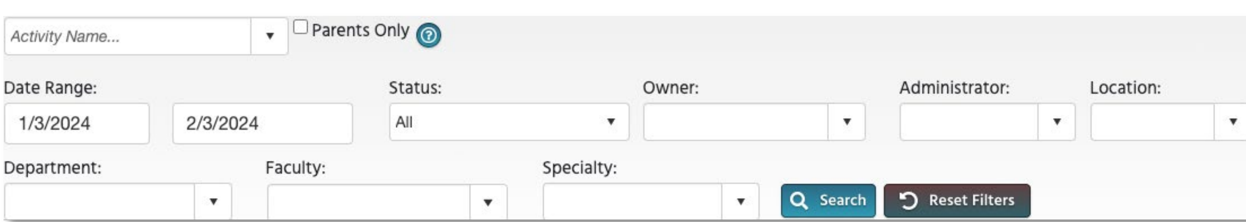
- Go to **https://vumc.cloud-cme.com** and sign in with your VUMC ID and password
- Click the word ***Administration*** in the lower left of the screen



- Select ***Activities*** then ***RSS Dashboard*** (note that depending on your role, you may see more options on this side menu)



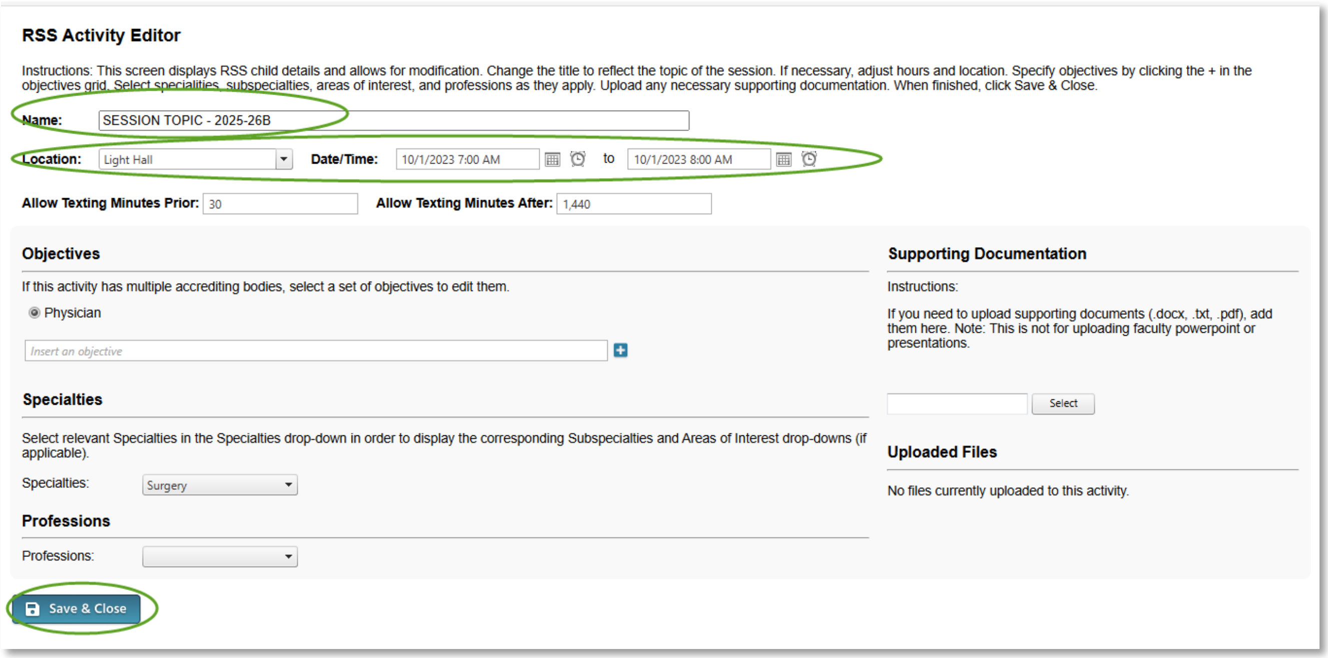
The RSS Dashboard provides a minimized view to easily manage your series. You will see all your assigned sessions. If needed, you can search by the Activity Name (or text code), Date Range, Status, Owner (aka CME Associate), Location, Department, Faculty, or Specialty.



Adding Required Session Components

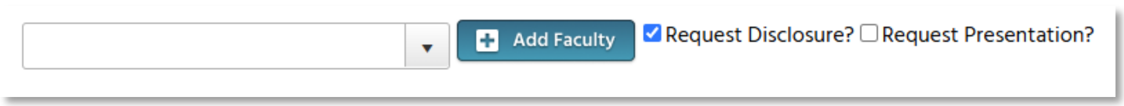
Click the title of the activity OR the pencil icon from the RSS Dashboard and a new screen will display.

- Enter the title/topic for the session. As of late 2024, this is now required by the ACCME. We realize some topics may repeat or may not be clearly outlined, but any title or description of the session you can include will help meet ACCME compliance criteria. Specifically, you can follow these guidelines:
    - **Grand Rounds**: Specific session title, presentation title
    - **MMI**: Health event addressed; Quality improvement topic
    - **Tumor Board**: Type of tumor discussed, Treatment plan, Pathology
    - **Case Conference**: Description of case discussed presentation title
    - **Journal Club**: Journal article title or specific topic
- Update location and/or date/time if needed
- ***Save and Close***



Click ***Manage Faculty*** and add any speakers/presenters/moderators not already listed.

- Search by Lastname, Firstname and ensure ***Request Disclosure*** is checked, but ***Request Presentation*** is not.
- If the series is a case conference, the Activity Director(s) will already be listed here.



Adding Required Session Components (continued)

- In the Faculty column, confirm all faculty listed have an up-to-date disclosure form on file in CloudCME. If they do not, follow up with them until completed. The session will remain in Incomplete status until all disclosure forms are on file in CloudCME.

If an upcoming Faculty does not already have a profile in CloudCME, they will need one before you can add them to the session. You can either add them administratively OR you can instruct them to go to **https://vumc.cloud-cme.com** to create a profile themselves, whichever is preferred.

To add them administratively:

- Go to ***Membership*** then ***Add Member***
- The profile form has many fields. While complete information is helpful, the fields below are the minimum required:
    - First Name
    - Last Name
    - Degree (used to confirm credit eligibility)
    - Organization
    - Email address
    - Department
    - Credit Eligibility
- Once complete, click ***Add*** at the bottom of the screen

Session Status

You should regularly check your RSS dashboard to monitor the status of your sessions. OCPD recommends CME associates check the RSS dashboard **on a daily basis**.

All sessions begin as ***Incomplete*** and move to either ***Pending*** or ***In Review*** as you add session details and disclosure forms are completed. If ***In Review***, the CPD Office needs to review potential conflicts listed on a disclosure form and may reach out to you to request a speaker's presentation. The CPD Office moves sessions from ***Pending*** or ***In Review*** to ***Approved*** as long as all conflicts of interest can be mitigated and all deadlines are met.

- All disclosure forms for the activity must be submitted through CloudCME ***no later than 10 business days*** prior to the session date.
- If the CPD Office requests speaker presentations, they must be submitted ***no later than 5 business days*** prior to the session date.

Texting Code

The texting code learners will use is the Child ID (note that it may have 5 or 6 digits). Do not distribute this code to learners before the session or to learners who did not attend.

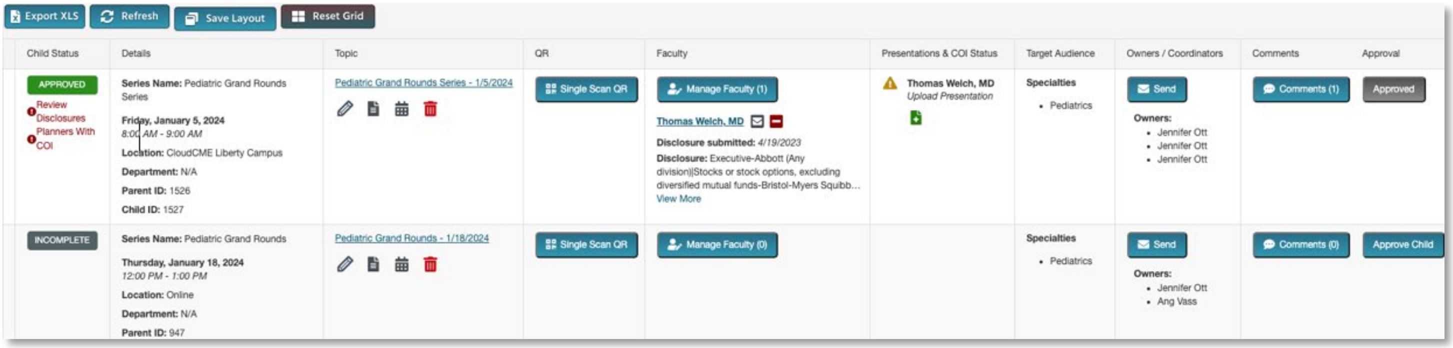
Child Status	Details	Topic
APPROVED	**Series Name:** Cardiothoracic Anesthesiology ECHO Conference - MOC Eligible 2022 **Monday, February 21, 2022** *6:00 AM - 7:00 AM* **Location:** Cardiology MCE NT - 5053 **Department:** N/A **Parent ID:** 53360 **Child ID:** 54671	Cardiothoracic Anesthesiology ECHO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

Brochure/Handout

Click the icon to automatically generate a brochure/handout that contains the session details, text code, and other instructions to distribute to your learners. Note that the brochure/handout and text code should not be distributed to learners prior to the session.

The file is a word document and may also be edited to provide additional details before distribution. Session details meet ACCME compliance requirements and should not be removed.

Full Glossary of RSS Dashboard Terms and Icons



Column: Child Status
This column contains a status icon and will update at various points in the workflow.

INCOMPLETE **Incomplete:** This status means that the session is missing required details. 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 **Pending:** This status represents a session that is complete and is pending review by the CPD Office for approval. This means all faculty have completed a disclosure and there was no Conflict of Interest (COI) (i.e. nothing was disclosed, or a potential COI was mitigated). It is pending approval by the CPD Office, and no further action is needed by the CME Associate.

IN REVIEW **In Review:** This status represents a session with faculty who have a completed disclosure and a potential Conflict of Interest has been noted on their disclosure form. The CPD Office checks this status daily and will reach out in the cases where a presentation upload is required.

APPROVED **Approved:** This represents a session that needs no other information and is ready for learners to text in and receive credit.

REJECTED **Rejected:** This represents a session with a conflict of interest that is not able to be satisfactorily resolved and the activity is rejected. This status should rarely be seen.

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

Full Glossary of RSS Dashboard Terms and Icons (continued)

Column: Topic
Click the session's title OR the pencil icon to edit the title, date, location, and any other applicable details. Supporting documentation files can also be uploaded here as needed.

Pencil Icon: Edit the title, date, location, and any other applicable details.

Brochure/Flyer/Handout Icon: Click this icon and the system will automatically generate the activity brochure/handout for distribution or display.

Calendar Icon: Click this icon and the calendar will display the scheduled sessions in this series.

Trash Can Icon: Click this icon to delete any unused sessions (of any status).

Column: QR
Click to download or copy a QR code to share with learners. Single Scan QR

Column: Faculty
This column is for adding, removing, and communicating with faculty.

Manage Faculty (1) **Manage Faculty Button:** Edit the title, date, location, and any other applicable details.

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. 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 session

Column: Presentations & COI Status
An icon displays in this column when one or more faculty have disclosed a financial relationship in their disclosure form. Note that a presentation is not necessarily required in this case. The CPD Office checks upcoming sessions daily and will reach out in cases where a presentation upload is required.

Session Changes

Moving a Session

When setting up your series, sessions are automatically generated based on the scheduling information given in the application for credit. Some series meet very predictably (e.g., the first Monday of each month), while others meet at variable dates and times, and you will need to adjust them to their correct date and time.

If you need to adjust a session's date and/or time:

- Click the session's title and edit the Date/Time fields
  OR
- Click the calendar icon and drag and drop the session to a new date

When moving a session, ensure it is not one that has been previously approved and used as this will interfere with learner credits.

When changing the session to a different date, be sure to also update the date displayed in the activity title. The date in the title is static and does not automatically update when the activity date is changed.

Adding a new session

If a new session in your series is needed:

- Navigate to any other session in the series
- Click the calendar icon and double-click on the desired date.
- Complete the session details in the pop-up that appears and add faculty as usual.

Updating an approved session

If you need to add a session's topic after the session has been approved and/or held (common for some case-conferences where topics are not chosen in advance), this may be done without impacting the session's status. However, larger changes that need to be reviewed by the OCPD such as changing faculty or updating a disclosure will change the session's status from Approved back to Pending or In Review. If changes requiring review and approval by the OCPD are needed, they must still be done at least 10 business days before the session occurs.

Deleting unused sessions

Any sessions that are cancelled or not used should be deleted in a timely manner by clicking the trash can icon underneath them. The session may be in any status. Not deleting these unused sessions makes it appear as if required session topics have not been entered and will impact your series renewal.

If a series will no longer be meeting at all, please contact the OCPD at cme@vumc.org

Presentation Review

When a Presentation Review is Required
If faculty (speaker/presenter/moderator) have potential conflicts of interest listed on their disclosure form, the session moves into ***In Review*** status so the CPD Office can review and mitigate. In some cases, the OCPD only needs the session topic and in others, the full set of presentation slides must be submitted for review.

Do not request or upload a presentation into CloudCME unless requested by the OCPD (even though there is always an option to do so on the RSS Dashboard).

How to Upload a Requested Presentation
If a presentation review is required, someone from the OCPD will reach out to you via email. You will need to either collect the presentation and upload it into CloudCME OR instruct the faculty to log in and upload the requested materials themselves.

The presentation must be uploaded to CloudCME in either **PowerPoint or PDF** format. Other file types are not supported.

To upload, locate the session on the RSS Dashboard, click the green + icon underneath the faculty member's name, and follow all prompts to attach the file.

OR

If the faculty member prefers to upload their own, they should log in at **https://vumc.cloud-cme.com** and select the orange ***Faculty*** button from the top menu. Under ***Upcoming Presentations***, a request to upload their slides will be listed.

Requested presentations must be submitted at least **5 business days** in advance of the session.

Presentations submitted outside this timeline
will not be reviewed and the session will not be approved for credits.

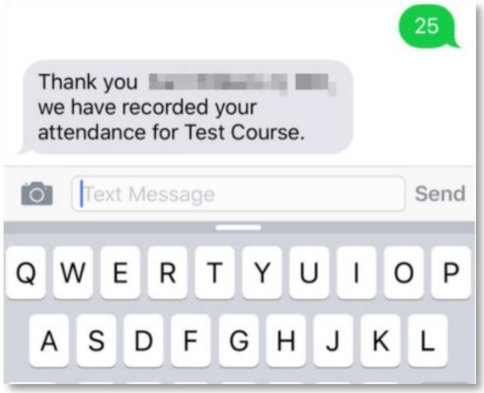
Assisting Learners

Texting for Credit

In order to claim credit for each session, learners must send an SMS with the text code (Child ID) to 855-776-6263 within 24 hours of the session. After texting, they should also log in to **https://vumc.cloud-cme.com** and complete the event evaluation.

All learners (even residents, fellows, and non-MDs) must text in to record their attendance.

When texting, learners will immediately receive a message like the one below noting that their attendance and credit have been received and recorded.

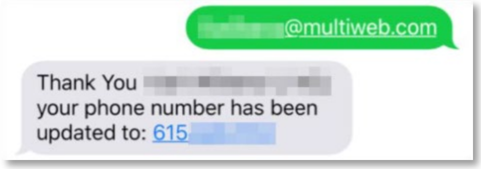


Credit awarding is instant, and users can log in to **https://vumc.cloud-cme.com**, click the ***MyCE*** button, then select ***Evaluations & Certificates***. They can download or email that transcript to themselves or others at any time.

If a learner is new to VUMC and needs to set up a CloudCME account:

- For Non-Vanderbilt learners: Go to **https://vumc.cloud-cme.com** and select Sign In > Non-Vanderbilt University Medical Center > Don't have an account?
- For Vanderbilt learners: Go to **https://vumc.cloud-cme.com** and select Sign In > VUMC Faculty and Staff

Note that before texting for the first time, they will need to pair their account with CloudCME by texting their email address, exactly as it appears in their profile, to 855-776-6263. This only needs to be done once, and they will receive a confirmation similar to the example below.



Assisting Learners (continued)

If a learner is having difficulty, confirm the following with them before reaching out to the CPD Office:

- They are texting the correct text code (Child ID) and are within the 24-hour timeframe of the session.
- They are sending the text code to 855-776-6263 and are not including any additional words, emojis, or other characters.
- They are sending an SMS text message rather than an iMessage.

Note that learners may text multiple times if needed during troubleshooting. CloudCME will not award duplicate credit via texting. If a learner is still having difficulty, or if they have forgotten to text within the 24-hour timeframe, you may manually add their attendance with the instructions below.

To manually add a learner to a session:

- Select ***Activities*** then ***Record Attendance***
- Search for the session by text code OR title
- Find your learner's name under ***Lookup & Add Existing User***
- Click their name, then click outside the search box
- After the page reloads, the learner will have credit for that session/course

When adding attendance, make sure to select the Add User & Award Credit option to ensure the learner receives CE credit. Choosing Add User & Record Attendance will only give the learner attendance credit and will not award CME credit. See detailed instructions and screenshots at **https://www.vumc.org/ocpd/manually-add-learner-cme-event**.

Reminder to Complete Evaluations + New Annual Evaluations

Learner evaluations are available for all sessions and strongly encouraged. For a number of MOC-eligible series, these evaluations are required in order for learners to earn their credits.

After texting, learners should log in at **https://vumc.cloud-cme.com** and select ***MyCE*** then ***Evaluations & Certificates*** from the top menu.

- To complete a REQUIRED event evaluation, select next to the session's title
- To complete an OPTIONAL event evaluation, select next to the session's title then ***Yes*** on the pop up

Beginning in fall 2025, annual series evaluations will be available in CloudCME in addition to session evaluations. They will be available to all attendees on the same Evaluations & Certificates page, and more detailed information will be sent closer to their launch.

Additional resources for learners can be found at **https://vumc.org/ocpd/resources**.

Miscellaneous

Renewals
In order to remain compliant with the ACCME, each series is periodically reviewed and renewed according to the schedule below.

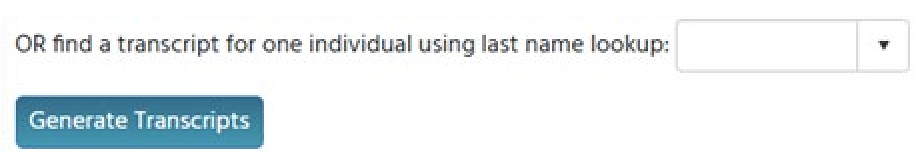
- Each MOC-eligible series is renewed annually. You will receive detailed renewal instructions by email each August.
- Each non-MOC-eligible series is renewed every 2 years. The title of your series indicates its renewal group and timeframe. You will receive detailed renewal instructions by email in August before the series expires.

For more information on the renewal process, visit **https://www.vumc.org/ocpd/rss-renewals-process.**

When an Activity Director or CME Associate Changes
If an Activity Director or CME Associate needs to be updated, please reach out to the CPD office at **cme@vumc.org** as soon as possible so we may update your series records and ensure disclosures have been reviewed. Any delay may result in sessions not approved for credit.

Reports
As a CME Associate, you have access to several different reports in CloudCME for each of your series. They can be found in the Administrative area of CloudCME by clicking ***Reports*** from the left menu.

- **Attendance by Session**: a graph showing attendance by date. You may search by session name or text code. You may also search an entire series by checking the Parents Only box and searching for the series title.
- **Credits**: a detailed report of all learners who have attended a session or series. This may be further filtered by date and other details. Like other reports, you may search for a specific session by its name or text code OR the entire series by checking the Parents Only box. Run Report to search.
- **Evaluations**: evaluation results from both individual sessions as well as the annual series evaluation.
- **Disclosures**: an additional way to search and view submitted disclosure forms for your activities. You can also use this option to determine if a faculty member, speaker, or CME associate has a current disclosure on file.
- **RSS Attendance History:** Similar to Attendance by Session
- **Transcripts:** Search for a learner's transcript if needed to assist them with credit or downloads. Search *Lastname, firstname*.



Duplicate Accounts
If someone has accidentally created more than one account in CloudCME, please reach out to **cme@vumc.org** in order to have them merged into one account.