



CloudCME Connect

May 1, 2025

CloudCME Connect is a weekly-ish bulletin to keep you, continuing education administrators, up to date on OCME's CE Portal transition to a new platform.

These first couple of editions are a pilot for OCME staff only, with some information and reminders. Eventually, it will include all parties of interest around campus, and hopefully contributions from many staff! Please DM me on future topics – what do you need to know the most about right now? **If nothing else, review the *Actions to Take Now* section below.**

Special Note: Monday's All-Staff Meeting will feature Paul Raknes from the PMO's Change Management Office to talk through upcoming plans and discuss information gathered in the recent survey that went out to OCME staff. So, this newsletter will stand in for this month's "CloudCME Update" agenda item. We'll be getting a LOT of CloudCME updates next week as it is. Buckle your seat belts!

[I'm hoping to set up a forum for people to develop a Professional Learning Community discussion for the near future.]

Important Dates and Deadlines

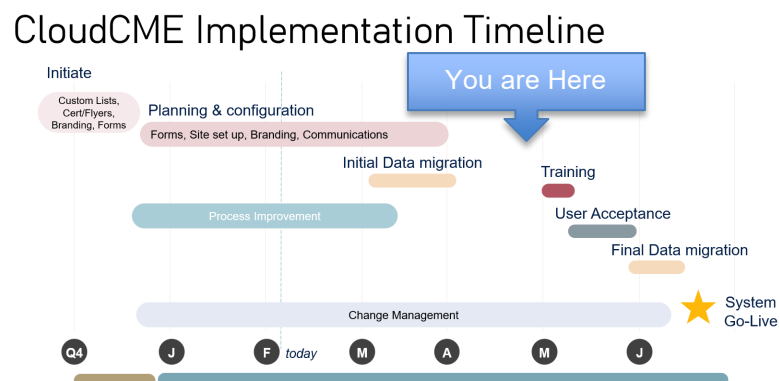
- **Now! Prepare for Core Training LIVE! (See below.)**
- **May 6-8:** CloudCME Core Training in Mission Hall Rm 2107, 9:00 am – 4:00 pm
- **May 12:** Last date to submit applications in HighMarks for automatic migration to CloudCME
- **May 15 - June 5:** User Acceptance Testing, Feedback, and Tweaks
- **May 23:** Last day to submit CloudCME credit request application form changes
- **June 13:** Last day to submit applications in HighMarks, period. It is suggested you wait for CloudCME to launch in July for activities starting after January 1, 2026.
- **June 30:** Go-live and transition of 2025 and 2026 activities from old platforms

Actions to Take Now

- Prepare for Core Training, May 6-8, 2025
 - Think about one of your most complex activities (or your easiest) to bring to the training and build live in CloudCME while we have experts at hand.
 - Complete the pre-training videos and documentation [review](https://ucsf.cloud-cme.com/course/onlinelisting?p=20) (no need to do anything, just be aware of what will be covered in the training labs). <https://ucsf.cloud-cme.com/course/onlinelisting?p=20> This should take about 60 minutes to complete in one sitting.
 - Download the CloudCME app from your mobile device's preferred app store and log in to test it out.
 - Although we cannot provide breakfast, lunch WILL be provided each day:
 - Tuesday – We must vacate our training room for another group from 1-2pm. We'll be heading to SFKebab Mediterranean Grill, attached to the building. A spot has been reserved for us outside (unless the wind gets really bad). Check out the menu: <https://www.sfkebab.com/menu.html> (If you're not into Med food, they have burgers, fries, and salads, too!)
 - Wednesday – Take a walk to Spark Social, get your tickets, and enjoy the many food truck options – the new SF staple! (Bring a light jacket, just in case.)
 - Thursday – This will be a tightly scheduled day, so we'll be staying in and eating in the training room, or surrounding lounge areas, with some wonderful selections from Boudin Bakery. (Another SF staple!)

Implementation Progress

The implementation team continues to be hard at work to bring the platform across the finish line. Most of the key activities are completed, and the folks at CloudCME are working feverishly to get all our updates in the system prior to training next week. There might be some updates you may not see, but this will be an excellent opportunity to not only learn to use the system but to kick the tires, take names, and send feedback to the team!



Implementing a new, large technology solution is like changing the engine of a moving car, and it will continue to be so for several months. We cannot completely stop and pull over until the process is complete; both efforts need to keep going. We anticipate running our current processes in parallel with new processes until all our activities can be transitioned effectively to CloudCME. This means some things will remain in HighMarks and Configio, and others will start anew in CloudCME. Take a deep breath and roll with it for a few months.

With that in mind, setting *cut-off* (“no more new stuff”) and *cut-over* (“now you do this instead of that”) dates has been a serious conversation among the Integration Committee members over the last few weeks. We may not have nailed it 100%, but pre-launch dates have been established, and the need to push our Go-Live date out a bit has become apparent. With a renewed expectation for a **“soft launch” on June 30**, we have more time to transition active courses from HighMarks to CloudCME, complete reviews and approvals of applications in progress, and have more time for User Acceptance Testing. Dates will be communicated soon!

Did You Know?

Licensing fees for technology platforms are expensive. Having multiple technology platforms that don’t talk to each other is also unproductive and, thus, expensive in terms of human resources. The implementation of CloudCME will consolidate our previous online learning management system (CMECalifornia), our current activity management system (HighMarks), our current registration/e-commerce system (Configio), and our current evaluation system (Qualtrics) into a single platform. It won’t be a ~~100~~ replacement, but relatively close. It will also save the office nearly \$65,000 per year in technology costs, not to mention valuable employee effort costs.

It will take some time to ramp up, to get used to new ways of doing things, or discover even newer ways! – So don’t fret if something feels amiss or you can’t move as quickly as you used to. Eventually, you and the system will get used to each other and start zooming along again! (Not that kind of Zoom®.)



What to Expect

This section will be dedicated to talking about major and minor process changes with the integration of CloudCME into our daily work. During setup, it was recognized that some of our current processes were

challenged by the workflows hard-coded within the system, inspiring a lot of discussion about how to make improvements without requiring huge workarounds. The philosophy here has been to get as much into CloudCME as feasible with as little external tracking as possible. (Pipe dreams, perhaps.)

We have yet to uncover challenges or solutions that may come up during the next few weeks of training and testing. The exercise is an excellent time to rethink what we do, how we do it, and why we do it. For that reason, the business analysis of our work with the PMO continues in the background, leading to a map of the future state of many of our workflows, which the next few weeks will also inform and refine. Stay tuned for progress on that front. *Also, many thanks to Sue, Jason and Paul from the PMO for their support and guidance.*

A PRE-WHAT?

One major change you will see first thing during training is the “Pre-application Process.” The pre-application is designed to manage four key facets of getting an activity into the system:

1. Collecting data for new activities – formerly known as “prospects” – to review for applicability to OCME’s mission, capacity, and goals. This will replace most of our current, external “New Inquiry” process.
2. Collecting data for annual, renewing activities to ensure they still meet OCME’s mission, capacity, and goals. This will ensure that previous activity files are compliant and ready to move forward with OCME support.
3. Collecting basic information about registration setup to phase out the Core Sheet form. ‘Nuff said. 🦋
(Note, this is a pilot process and will likely take a few rounds of review and tweaks!)
4. Providing a gateway for “random” submissions that have not been reviewed or vetted by OCME to even offer credit. Yes, it happens that someone finds the application link and submits a credit request, then asks, “How much credit do we get?” when we have no idea what the program is even about or if we can support it. This automates the many “Not so fast, Buster – we need to talk” emails.

In CloudCME, the “pre-application” is primarily the “Basic Information” tab of the full application. Upon completion, a notification for review will be sent to the necessary recipients, but the submission cannot continue beyond that tab until the pre-app is approved. Once approved, the entire application opens to the submitter to continue the credit request process.

Big change for you: you can start the application, but you will not be able to finish it in the same sitting. This will be perceptively inconvenient now, but a huge savings in effort later.

Bonus: The pre-app will hopefully **eliminate** another challenge posed by CloudCME of not allowing the promotion of and/or registration for an activity prior to the application’s approval. More on that in a future bulletin.

In Closing

It would be great to know if you found this useful or lacking, and to hear more about what’s on your mind during the transition that could be addressed in future newsletters. There’s no way to include everything, everywhere, all at once, so having an incremental approach that addresses information needs or skills gaps is likely the best way forward for the time being. Feedback to tym.peters@ucsf.edu (until I can find a way to set up that forum I mentioned in the very beginning). This was also an interesting test of our new “Fact Sheet” branding template.