

UCSF Continuing Education Portal



CloudCME Glossary of Common Terms

System-Related

- **Activity Editor (AE)** – An internal-facing module for Administrators to create and manage educational activities within CloudCME.
- **Application Module (AM)** – A section of CloudCME to create, submit, review, and manage credit request applications. Navigate to the AM by selecting the link in the Planner Resources sidebar on the home page or opening <https://ucsf.cloud-cme.com/application> in a web browser.
- **Attendee Portal (AP)** – The platform home page that serves as a hub for all system activity as well as CE activity listings, registration, evaluation, assessments, and content hosting.
- **Faculty Portal (FP)** – A section of the AP where individuals participating in the delivery of the activity can view and perform various tasks and manage presentations.

User-Related

- **Administrator** – Any individual with a role that allows access to the administrative side of the system to manage users, reports, activities, etc.
- **Author** (previously known as a Submitter) – The individual creating and/or submitting a credit request.
- **Coordinator** – Any individual involved in managing an activity.
- **Faculty** – Any individual with a role in delivering an educational activity, which includes course chairs, program directors, presenters, moderators, panelists, etc.
- **Members** = Users
- **Owner** – The individual(s) who have access to view and manage an activity.
- **Planner** – Any individual with a role in designing content (program directors, planning committee members) for an educational activity.

Educational Activity-Related

- **Child/ren** (formerly known as “sessions” – The individual educational components of an activity, such as a conference session in grand rounds (RSS), or a module in an online learning activity.
- **Enduring Material** – An asynchronous (not in real-time), on-demand activity, such as a video, journal article, or interactive module.
- **Parent** – The primary educational activity record.
- **Product** – An item available for purchase during the enrollment process for an activity, for example, a physician attendee registration fee, or an optional add-on such as a printed syllabus or social event.
- **Recurrence** – The frequency and schedule of a child activity, or session, in an RSS.
- **Regularly Scheduled Series (RSS)** – An activity that includes conferences or webinar scheduled at the same time and frequency throughout the year, such as grand rounds, tumor boards, etc.
- **Session** – A block of presentations in live and enduring activities by which participants can claim credit.

Task-Related (Faculty menu tabs)

- **Activity** – Activity tasks are tasks that apply to specific activities, such as uploading a presentation or completing a speaker agreement form.
- **Global** – Global tasks are tasks that apply to members in the system and are independent of individual activities, such as uploading a CV, photo, or completing disclosure of financial relationships. These tasks can be completed at any time and also show an expiration date for when the task must be re-completed, if applicable.
- **Peer Review** – This task appears for any individual assigned as a peer reviewer for a presentation. This function allows visibility into a speaker’s disclosure, their presentation, and potential methods of mitigating financial relationships.

Forms-Related

- **Application** – Also known as the “credit request: a series of forms to gather information documenting the planning and delivery of the activity.
- **Pre-application** – The initial form of a credit request for review by OCME to be able to continue submitting a full credit request.
- **Template** – A pre-designed form that can be copied and attached to an activity, such as a test or evaluation. The generated form can then be modified/customized.