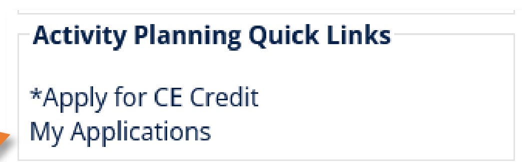
UCSF Continuing Education Portal

CloudCME

The Application Dashboard

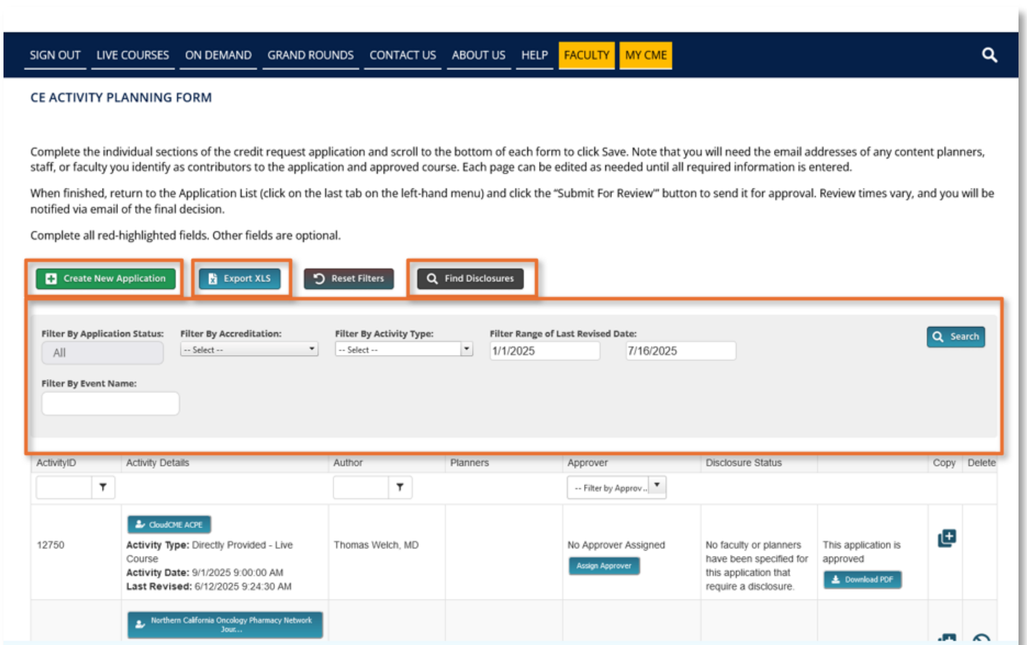
The Applications Dashboard is a central place to manage your requests for CE credit. From here you can create, review, edit, delete, export, and submit applications to award CE credit for activities.

Navigate to the dashboard at https://ucsf.cloud-cme.com/applications or selecting "My Applications" from the side bar on the CE Portal home page. If you are not already signed in to the CE Portal, you will be asked to do so before accessing the dashboard.



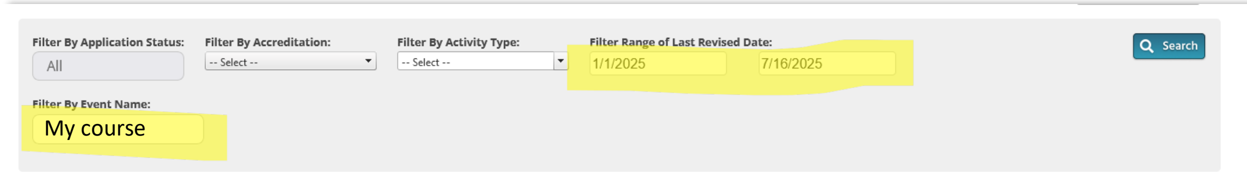
Your Applications

There are a few actions you can take in the Applications Dashboard, including creating a new application, exporting your list of applications to Microsoft Excel, and verifying the disclosure of financial relationships information for specific faculty members.



Use the filters section to find specific applications in your list.

You can filter your list of applications by an application's status, credit type, activity type, revision dates, or name. All of these are optional and can usually be ignored.



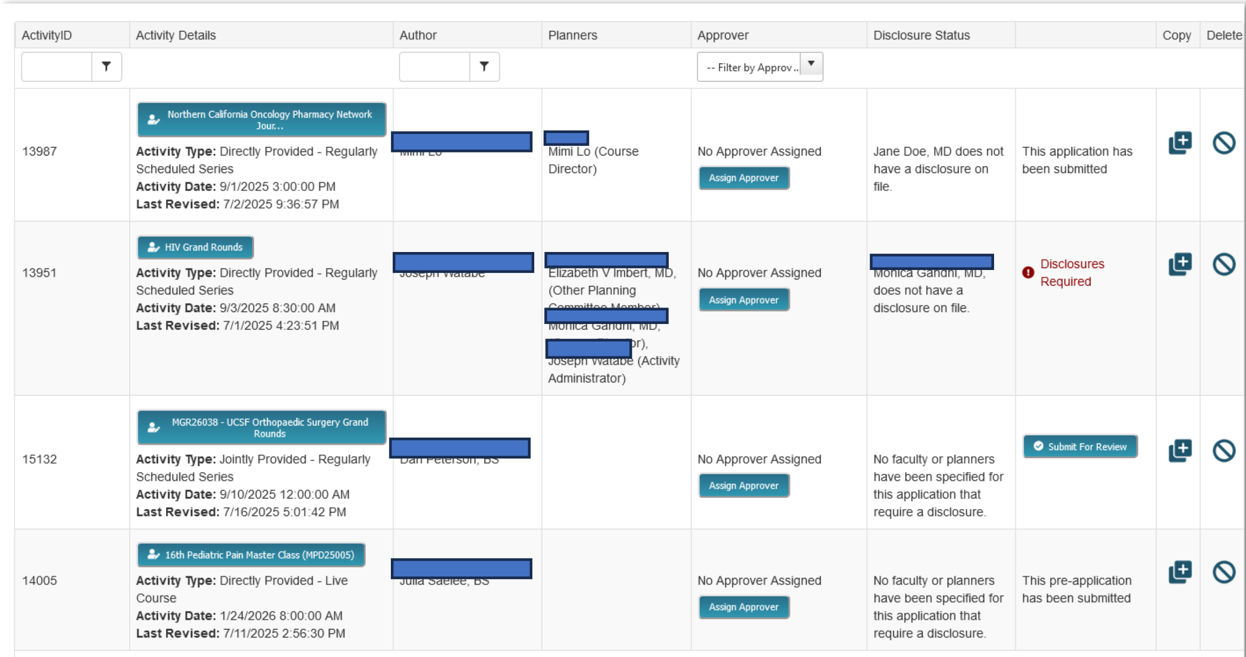
- Filter the application status by **All**, **In Progress Only, Approved Only**, **Submitted Only**, or hide those currently **In Progress** or already **Approved**. The default filter is **Hide Approved** to show only those you're currently working on.
- Select one or more credit types from the Accreditation box to see only applications related to specific professions.
- Select a specific activity type, such as courses, enduring materials, or regularly scheduled series, to show only those types of applications that belong to you.

If you do apply a filter, always check the date range filter to ensure you're seeing the current applications in the list.

You can also simply filter by event name by typing a keyword from the activity's title in the box.

Once you have all your filter criteria set, click the **Search** button to update your dashboard.

Dashboard Columns



ActivityID	Activity Details	Author	Planners	Approver	Disclosure Status		Copy	Delete
13987	Northern California Oncology Pharmacy Network Jour... **Activity Type:** Directly Provided - Regularly Scheduled Series **Activity Date:** 9/1/2025 3:00:00 PM **Last Revised:** 7/2/2025 9:36:57 PM	[redacted]	[redacted] Mimi Lo (Course Director)	No Approver Assigned Assign Approver	Jane Doe, MD does not have a disclosure on file.	This application has been submitted		
13951	HIV Grand Rounds **Activity Type:** Directly Provided - Regularly Scheduled Series **Activity Date:** 9/3/2025 8:30:00 AM **Last Revised:** 7/1/2025 4:23:51 PM	[redacted]	[redacted] Elizabeth V Imbert, MD, (Other Planning [redacted] r), [redacted] (Activity Administrator)	No Approver Assigned Assign Approver	[redacted] does not have a disclosure on file.	Disclosures Required		
15132	MGR26038 - UCSF Orthopaedic Surgery Grand Rounds **Activity Type:** Jointly Provided - Regularly Scheduled Series **Activity Date:** 9/10/2025 12:00:00 AM **Last Revised:** 7/16/2025 5:01:42 PM	[redacted]		No Approver Assigned Assign Approver	No faculty or planners have been specified for this application that require a disclosure.	Submit For Review		
14005	16th Pediatric Pain Master Class (MPD25005) **Activity Type:** Directly Provided - Live Course **Activity Date:** 1/24/2026 8:00:00 AM **Last Revised:** 7/11/2025 2:56:30 PM	[redacted]		No Approver Assigned Assign Approver	No faculty or planners have been specified for this application that require a disclosure.	This pre-application has been submitted		

Names redacted for privacy.

The columns in the dashboard are relatively self-explanatory. Depending on your role in the system, not all columns will appear on your dashboard.

- **Activity ID**: shows the unique ID assigned by the platform for the application; this will later become the ID for the activity once approved.
- **Activity Details:** shows the name of the activity, its activity type, start date, and the date of the last revision of the application.
- **Author:** shows the name of the submitter of the application.
- **Planners:** shows the content planners in the application, including the course director, activity administrator, and planning committee members. If this cell is blank, this item is in the pre-application stage.
- **Approver:** This is specific to certain roles that can assign final approvers for pre-applications and completed full applications.
- **Disclosure Status:** indicates the current status of the disclosure of financial relationships of any person entered in the application. You will be notified if a disclosure is not on file, which is required to submit the application. If this column indicates no faculty or planners have been entered, this item is at the pre-application stage and is OK to submit as a pre-application.
- **"The Unnamed Column"**: indicates the status of an application. If it displays a *Submit for Review* button, an application is ready for submission. When an application is

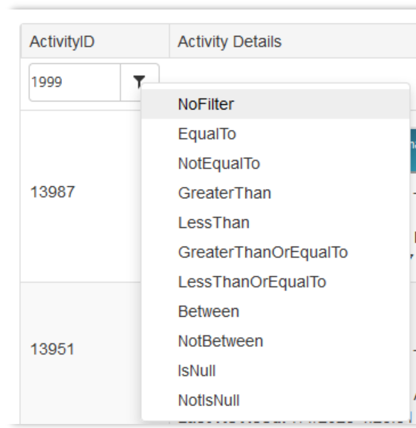
completed and approved, a *Download PDF* button will appear to download a copy of the application.

- **Copy**: duplicate a previous application to update for a renewal
- **Delete**: delete the application altogether

The last two options will only be available depending on the status of the application; for example, an incomplete application cannot be copied, and an approved application cannot be deleted. Click one of these icons to take the desired action when needed.

Getting Specific with Searches

Note that some columns have text boxes and filter icons. This includes the **ActivityID** and **Author** columns. Use these filter to restrain your displayed list even further. Enter the value you want to search, then click the filter icon. Select how the search should treat your entered information, and the list will automatically filter.



Managing Applications in the Dashboard

In the Dashboard itself, use the following buttons to manage your applications.

The **Copy** icon will duplicate an application to update for a succeeding iteration.

The **Delete** icon will inactivate the application and remove it from your list. (Nothing in the system is actually deleted, just hidden from view.)

Click on the **activity title** to open the application for editing or review.

The **Submit for Review** button finalizes applications or pre-applications to submit to the Office of CME for the peer review process.