UCSF Office of Continuing Medical Education

UCSF Medical Education is a part of the UCSF School of Medicine.
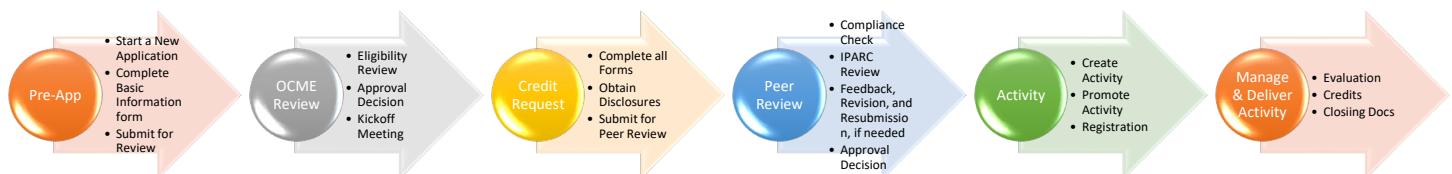
meded.ucsf.edu/ continuing-education

UCSF Continuing Education Portal

CloudCME®

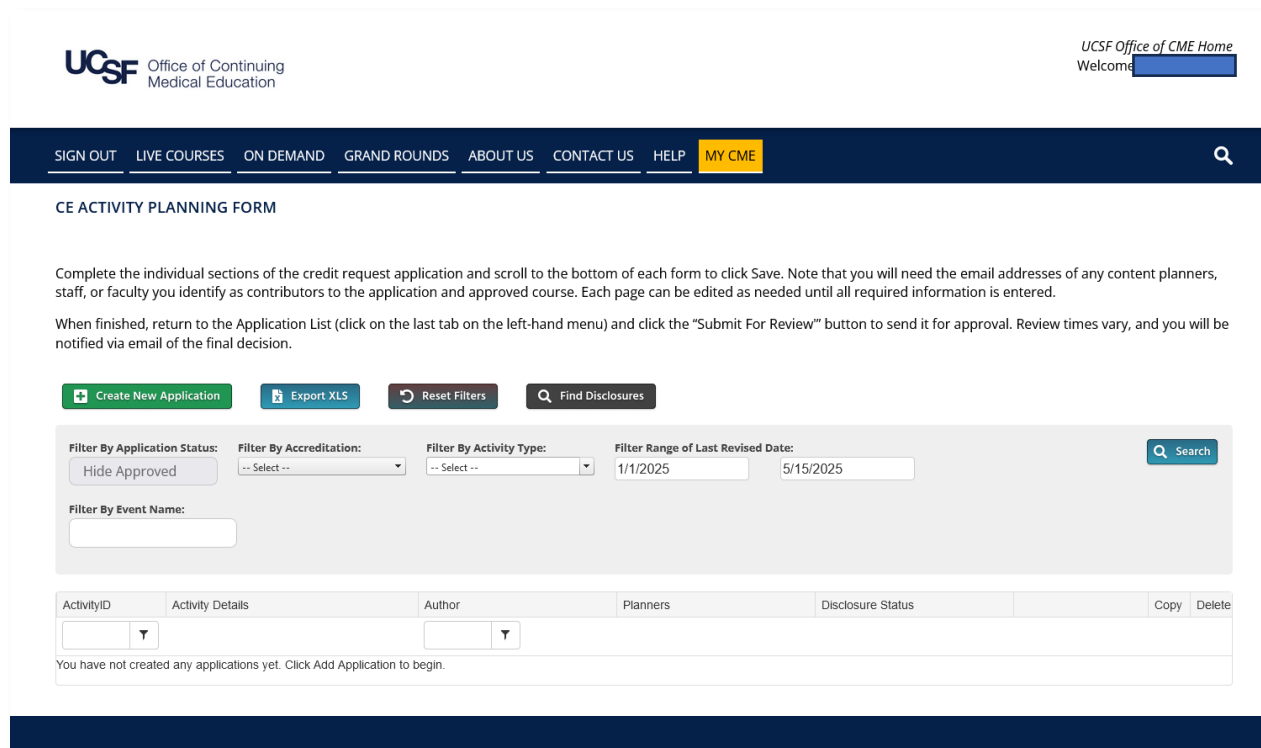## CE Portal Application Process

Introduction

The application process in CloudCME® is used by program directors, content planners, administrators, and other authorized individuals to propose new continuing education activities or to renew current activities. It ensures that required documentation is submitted for accreditation compliance and institutional review. Approved applications are then converted into activities visible in the Activity Manager for further setup and tracking.

Below is an overview of the application and activity management process.

Pre-App
- Start a New Application
- Complete Basic Information form
- Submit for Review

OCME Review
- Eligibility Review
- Approval Decision
- Kickoff Meeting

Credit Request
- Complete all Forms
- Obtain Disclosures
- Submit for Peer Review

Peer Review
- Compliance Check
- IPARC Review
- Feedback, Revision, and Resubmission, if needed
- Approval Decision

Activity
- Create Activity
- Promote Activity
- Registration

Manage & Deliver Activity
- Evaluation
- Credits
- Closing Docs

The Applications Dashboard

The Applications Dashboard is where you manage your applications. Here, authors and planners can create, review, edit, delete, export, and submit applications.

Navigate to https://ucsf.cloud-cme.com/application or select the "My Applications" link from the home page to begin. You will be asked to sign in if you aren't already.

For details on using the Application Dashboard, see the Applications Dashboard help section.

Pre-Application

The process begins with submitting a pre-application, which collects preliminary information about the renewing or proposed activity. The Office of CME will review the pre-application for alignment with our mission, functional capacity, prior compliance documentation (if applicable), and eligibility to certify for credit.

Following this initial review, the sections for the full credit request application will become accessible.

1. Click the button to start a new, blank application.

2. Complete the Basic Information form.[1] Fields highlighted in light red are required.

3. For repeating activities, you will need to know the previous "course number" assigned by OCME. If there is an application for the previous iteration, you can also duplicate that application to update for the current year. Click the button in the **Copy** column to duplicate an application.

4. Click **Save and Continue** at the bottom of the application when complete, or you will lose your entries.

5. Select **Return to Applications List** from the menu.

6. On the Applications Dashboard, click **Submit for Review**.

7. Your **Applications Dashboard** will indicate if the proposal submission was successful.

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[1] See Appendix 1 in Activity Planning Resources on the website for a preview of the credit request application questions by form name.

Full Application

Upon approval, OCME will work with you to schedule a "kick-off" planning meeting and/or training as needed. You can proceed to complete the remaining forms in the credit request application and submit the full application for review.

You must identify all financial relationships with ineligible companies[2] held by the activity's administrator(s) and planning committee members before submitting the application.

If registration services are requested with a desire to open enrollment to participants prior to completing the credit request process, OCME will establish a minimal course landing page to appear on our course calendar in order to accept registrations.

1. The application you started will appear on your dashboard with a **Submit for Review** button.

2. Click the title of the application to continue, then open the **Planners and Faculty** tab. Repeat with other tabs in the forms sidebar.

3. Be sure to click **Continue and Save** on each screen to save your progress. You can always return later to complete any missing information.

4. Once all forms are complete, Select **Return to Applications List** from the menu.

   [Return To Applications List]

5. On the applications dashboard, click **Submit for Review**.

   [✓ Submit For Review]

Pre-Application
Planners and Faculty
Gap and Needs
Objectives and Learning Outcomes
Commercial Support
Commendation Criteria
Signatures
Files - upload/download
Comments
Return To Applications List

For more information on completing the application forms, see the appropriate aid documents on the website under Activity Planning Resources.

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[2] *Companies that are ineligible to be accredited are those whose primary business is producing, marketing, selling, re-selling, or distributing healthcare products used by or on patients.*