



Coordinators Training Manual for Regularly Scheduled Series (RSS)

July 2025

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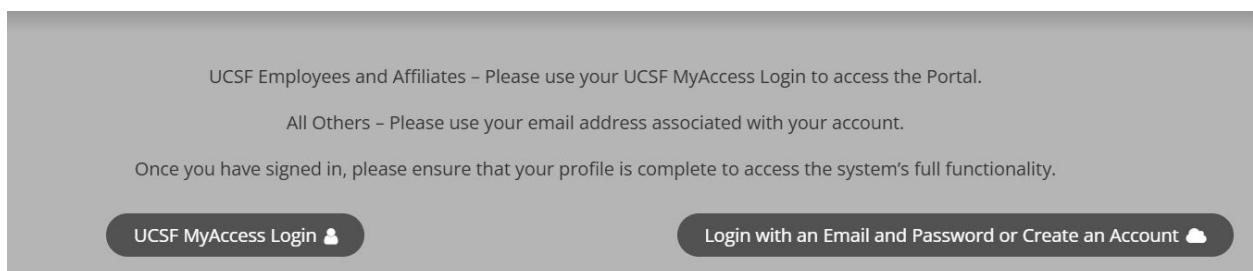
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RSS Dashboard Introduction

CloudCME® offers the RSS Dashboard to users who want to easily manage RSS child activities. In the RSS Dashboard, users can view the child status, activity details, presentations and COI status, and target audience. Users can also edit and manage the activity, email Planners, Faculty and Owners/Coordinators, as well as upload and download presentations and generate flyers.

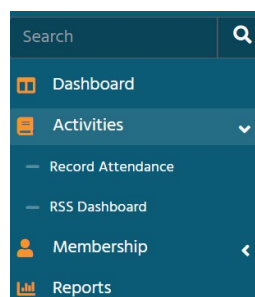
1. First, log into CloudCME®. Click the appropriate sign in method, and then click the **Login** button.



At the bottom of the screen, click the **Administration** link.



2. Then, from the Main Menu, go to **Activities > RSS Dashboard**.



The **RSS Dashboard** screen will display. The RSS Dashboard provides a view to easily manage RSS activities. Coordinators will see all the activities assigned as Coordinator/Owner by the Administrator.

There are a variety of ways to search the RSS Dashboard. Search by the activity name, **Date Range**, **Status**, **Owner**, **Administrator**, **Location**, **Department**, **Planner**, **Faculty** or **Specialty**.

Activity Name... ☐ Parents Only

Date Range: Status: Owner: Administrator: Location:


Department: Faculty: Specialty:

Click **Search** to display results in the dashboard.

<input type="button" value="Export XLS"/> <input type="button" value="Refresh"/> <input type="button" value="Save Layout"/> <input type="button" value="Reset Grid"/>							
Child Status	Details	Topic	QR	Faculty	Presentations & COI Status	Target Audience	Owners / Coordinators
APPROVED	Series Name: Pediatric Grand Rounds Series Friday, January 5, 2024 8:00 AM - 9:00 AM Location: CloudCME Liberty Campus Department: N/A Parent ID: 1526 Child ID: 1527	Pediatric Grand Rounds Series - 1/5/2024 	Single Scan QR	Manage Faculty (1) Thomas Welch, MD Disclosure submitted: 4/19/2023 Disclosure: Executive-Abbott (Any division)(Stocks or stock options, excluding diversified mutual funds-Bristol-Myers Squibb... View More	Thomas Welch, MD Upload Presentation 	Specialties • Pediatrics	<input type="button" value="Send"/> Owners: • Jennifer Ott • Jennifer Ott • Jennifer Ott
INCOMPLETE	Series Name: Pediatric Grand Rounds Thursday, January 18, 2024 12:00 PM - 1:00 PM Location: Online Department: N/A Parent ID: 947	Pediatric Grand Rounds - 1/18/2024 	Single Scan QR	Manage Faculty (0)		Specialties • Pediatrics	<input type="button" value="Send"/> Owners: • Jennifer Ott • Ang Vass









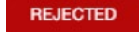



RSS Dashboard Columns

- Child Status** - As the RSS child activity goes through the approval process, this column will continuously update the status to either, **INCOMPLETE**, **PENDING**, **IN REVIEW**, **APPROVED**, or **REJECTED**.
- Details** - This column will display the **Series Name**, the date and time of the child activity, **Location**, **Department** and **Parent ID** and **Child ID**.
- Topic** - This column shows the name of the RSS child activity and the option to edit, create a flyer, view recurrence settings, and deactivate the activity.
- QR** - This QR code can be scanned by users logged in to the CloudCME® mobile app.
Single Scan QR is used for recording attendance.
- Planners** (Optional) - Coordinators will be able to email, view, add or remove planners, add roles, and export planning committee member information. The **Disclosure** and **Disclosure Submitted** date will also be viewable in this column.
- Faculty** - This column displays faculty assigned to the RSS child activity. RSS Coordinators can manage, email, and remove faculty members from this column. The disclosure status will be displayed beneath each faculty name along with their disclosure submission date.



7. **Presentation & COI Status** - This column displays the faculty's COI status, as well as icons to **Upload**, **Download** and **Remove** a faculty presentation.
8. **Target Audience** - This column shows the Specialties and Professions selected during the parent activity setup. These can be revised on the RSS child editor when the Pencil icon  is selected from the **Topic** column.
9. **Owners/Coordinators** - This column displays the activity Owner and Coordinator names as well as the option to send them an email.

RSS Dashboard Icons and Definitions


The following icons (1-8) can be found in the **Presentations & COI Status** column:

1.  **Incomplete** - This status represents faculty that have not been assigned to the activity, a presentation has no disclosure on file, or the disclosure on file has expired. RSS Coordinators/Owners will see  by default until faculty are assigned and disclosures have been completed.
2.  **Pending** - This status represents faculty who have completed a disclosure, and no financial relationships were declared, (i.e. no financial relationships were disclosed, or COI was mitigated). The system will send an email to the Administration email on record when the RSS status changes to .
3. **In Review** - This status represents Faculty who have a completed disclosure, and at least one financial relationship has been declared, triggering the COI Mitigation process. If one faculty member is rejected, and other faculty have been approved, the Activity Status will remain .
4.  **Approved** - This represents faculty who have completed a disclosure; no financial relationships are declared or, if identified, COI mitigation has been satisfactorily completed. The  status will also display if an Administrator conducts an Approval Override or if the activity is automatically approved if the user has nothing to disclose.
5.  **Rejected** - This represents faculty who have completed a disclosure, a financial relationship has been declared, and the conflict is declared immitigable. The activity is then , the coordinator will remove this faculty member, select a **new** faculty member, and begin the process again.
6.  **Upload** - Uploads a presentation file for the faculty member.
7.  **Download** - Downloads presentation file for the faculty member.
8.  **Delete** - Deletes presentation file for the faculty member.

Faculty and Planner (Optional) column:

1.  **Email** - Draft and send an email to the selected faculty member/Planner.
2.  **Remove** - Removes faculty members from the activity.

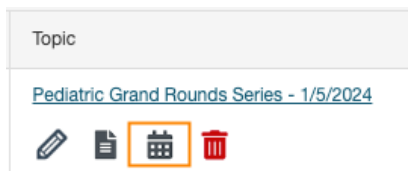
Owners/Coordinators column:

1.  **Send** Draft and send an email to Owners/Coordinators.

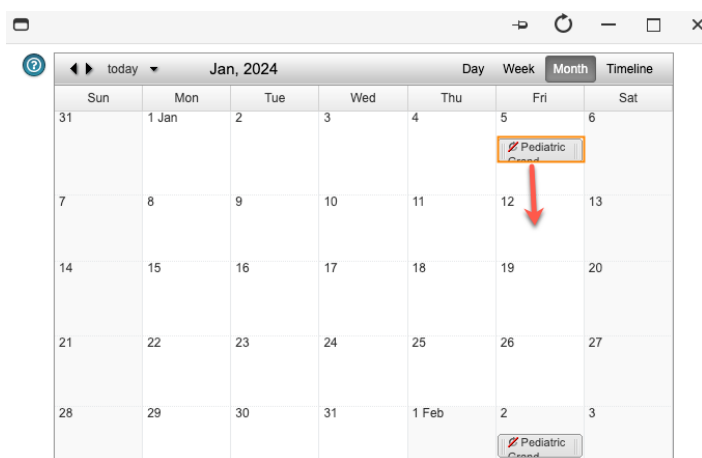
Using the RSS Dashboard

Calendar

Click the calendar icon (📅) in the **Topic** column to display a pop-up window that will show a calendar with the recurrence dates of the child activities.



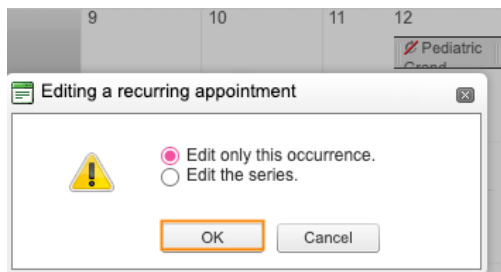
To change the date of a child activity, users can drag and drop the child activity to a new day.



To edit a child activity, double-click on the activity in the calendar. A pop-up window will display.

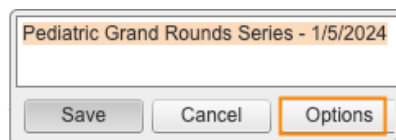
The radio button will default to **Edit only this occurrence**. This option will only edit the child activity that was selected.

Click **OK**.



To create a new child activity, double-click on a date in the calendar and follow the steps below.

To edit the title of the child activity, type the new title into the textbox that will display. To revise the date or time the activity will occur, click the **Options** button.

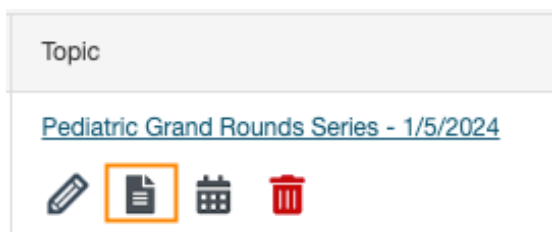


A new window will display. Coordinators can edit a child activity by entering text in the text box and selecting the date and time of the child activity.

Click **Save** to save any changes.

RSS Flyers

To customize the RSS flyer, click the **RSS Flyer** icon () in the **Topic** column, and then click the **Download Microsoft Word Version** link.



The flyer will open as a Word document. Make the desired changes and click **Save**.



NOTE: A list of merge fields that can be used in the RSS Flyer can be found here: [Document Merge Fields](#).¹

To associate the revised flyer to the RSS parent for use per each child activity of the parent, click the **Upload Flyer** button, select the revised flyer from your desktop, and check the **Use flyer/templates for Parent?** Checkbox. Then, click the **Save** button.

¹ Note: Log in to the CloudCME® Administration area before clicking the Help article links.

Training Case (ACS) (1).docx Remove

Upload Flyer

Save

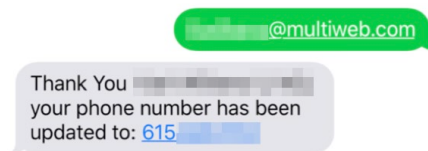
☒ Use flyer/template for Parent?

SMS Texting

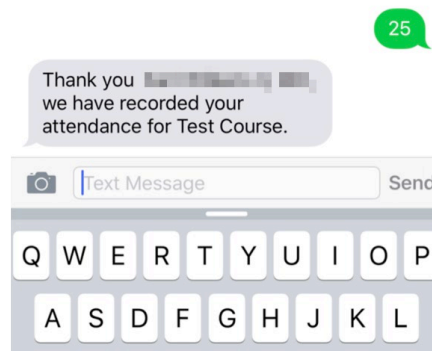
These instructions are intended only for users that have an active account in CloudCME®. Attendance can only be recorded 0 minutes prior to the activity, during the activity, or 10,000 minutes after the activity.

Step 1: First, *users must pair their mobile phone to their account in CloudCME®*. Text the email address associated with this account to **(833) 992-1812**. A message will be sent that looks like the one below, confirming that the phone number has been updated.

NOTE: This is a one-time operation.



Step 2: To record attendance to an activity, text the activity ID or code that has been provided for the activity². A message will be sent that verifies that activity attendance has been recorded.



NOTE: Attendance can only be recorded once to an activity. If a user tries to record attendance an additional time, they will receive the following message:

² You must text an SMS text message not an iMessage, if using iOS.

25

Thank you [REDACTED]
however your attendance for
Test Course has already been
recorded.

If a user attempts to use an activity code that does not exist, they will receive the following message:

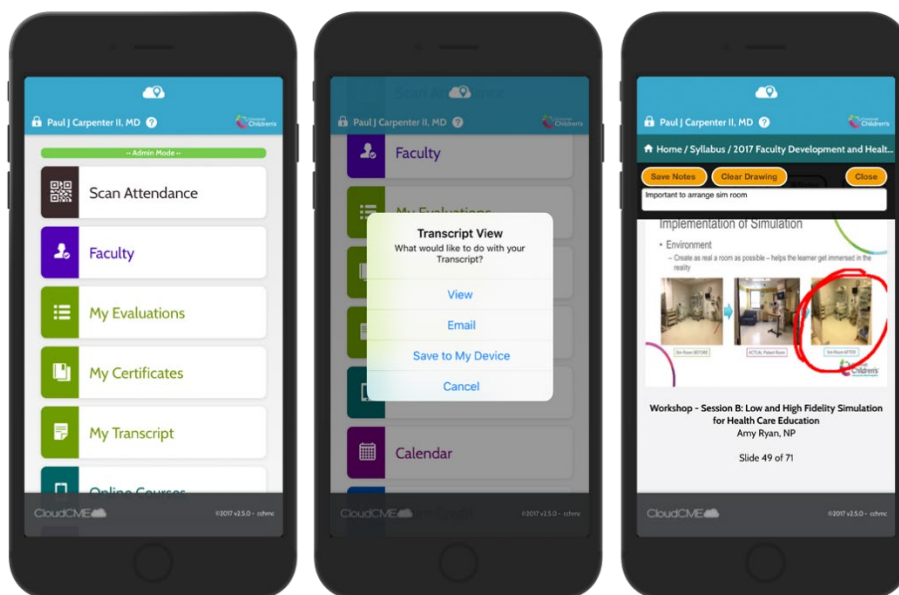
X12345678

X12345678 is not an activity id
or activity code for an activity in
the CloudCME system. Please
find the activity id or code for the
activity you are trying to register
for and try again using only the id
or code.

QR Code Scanning

These instructions are intended only for users that have an active account in CloudCME® and are using the CloudCME® mobile app and tapping the **Scan Attendance** button in the app. Attendance can only be recorded 0 minutes prior to the activity, during the activity, or 10,000 minutes after the activity.

Step 1: First, users must have access to the CloudCME® mobile app. Download the app and login once, then all **My CME** content, CE tasks, activity listings, and **Scan Attendance** will be available from the mobile device.



Download Links

Download the app for free from the app store and login using the organizational code (which is the prefix to your CloudCME® portal URL, **UCSF**.cloud-cme.com). Then, enter your CloudCME® username and password. Both institutional Single Sign-On and non-Single Sign-On CloudCME® account types are supported.

Apple iOS - <https://itunes.apple.com/us/app/cloudcme/id624053130?mt=8>

Google Android -

https://play.google.com/store/apps/details?id=com.cloudcme.checkin&hl=en_US&gl=US

Step 1: Download the app

Step 2: Open the app, enter the organization code **“UCSF”**

Step 3: Click the **Login or Create Account** button

Step 4: Login using your email address and password

Step 5: Once logged in, scan the QR code that can be generated from the RSS Dashboard to record attendance. These QR codes can either be printed or included as part of a presentation slide, then scanned using the **Scan Attendance** button in the mobile app.

Resources

Please find below some helpful videos that review the RSS Dashboard and the Record Attendance screen:

[RSS Dashboard Training Video](#)
[Record Attendance Training Video](#)

NOTE: You must be logged in to the CloudCME Administration site to view these videos.