

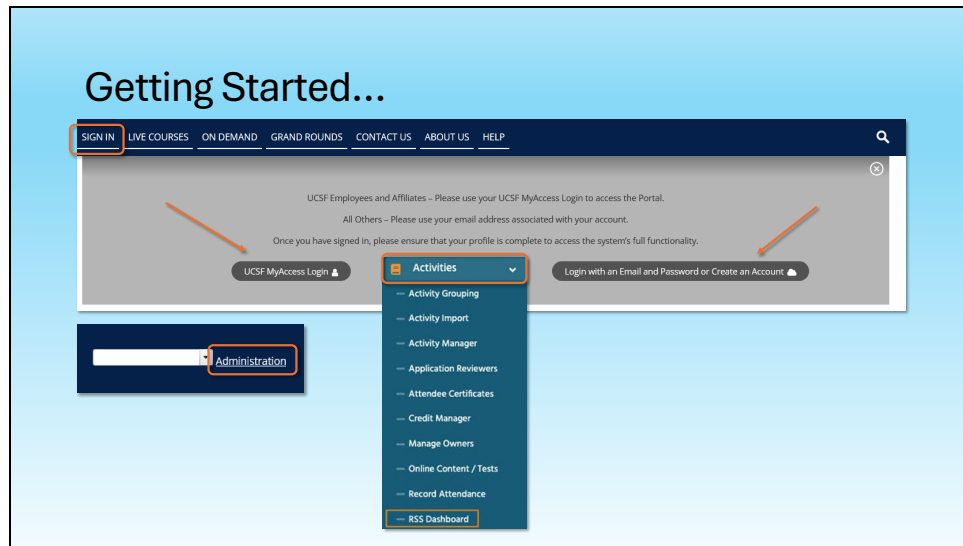
Activity Management is an orientation and training series of modules for managing CE activities in the new UCSF Continuing Education Portal.

This module is an overview to the RSS Dashboard; it is appropriate for coordinators and administrators of regularly scheduled series.

If you're following along in the live system while watching the video, feel free to pause to explore features or practice what has been demonstrated.

Note that your screens may differ from those shown here.

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 the activity, manage, and email Planners, Faculty, and Owners/Coordinators, upload and download presentations, and generate flyers.



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. If you do not see this link, contact the Office of CME for access.

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

The **RSS Dashboard** screen will display.

RSS Dashboard Screen

The screenshot displays the RSS Dashboard interface. At the top, there's a header with 'Activity Name...' and a 'Parents Only' toggle. Below this is a 'Search Tools' section with filters for Date Range (1/3/2024 to 2/3/2024), Status (All), Owner, Administrator, Location, Department, Faculty, and Specialty. A 'Search' button is highlighted with a red box. Below the filters is a table with columns: Child Status, Details, Topic, QR, Faculty, Presentations & COO Status, Target Audience, Owners / Coordinators, Comments, and Approval. The table contains two rows of data for 'Pediatric Grand Rounds'.

Child Status	Details	Topic	QR	Faculty	Presentations & COO Status	Target Audience	Owners / Coordinators	Comments	Approval
Active	Series Name: Pediatric Grand Rounds Topic: Pediatric Grand Rounds Series Friday, January 5, 2024 8:30 AM - 9:30 AM Location: CloudCamp Liberty Campus Department: N/A Planner ID: 1025 Child ID: 1027	Pediatric Grand Rounds Series... 1/5/2024	Single Scan QR	Thomas Welch, MD Disclosure submitted: 4/10/2023 Disclosure: Executive Assistant (N/A) Disclosure: Director of Operations, including Disclosure: Medical Supply Director Maria Riquelme... View More	Thomas Welch, MD General Presentation	Specialties • Pediatrics	Owners / Coordinators • Pediatrics Send Comments (1) Approved		
Inactive	Series Name: Pediatric Grand Rounds Topic: Pediatric Grand Rounds Series Thursday, January 18, 2024 12:00 PM - 1:00 PM Location: Online	Pediatric Grand Rounds Series... 1/18/2024	Single Scan QR	Manage Faculty (3)		Specialties • Pediatrics	Owners / Coordinators • Pediatrics Send Comments (0) Approved		

The RSS Dashboard provides a view to easily manage RSS activities. Coordinators will see all activities that they have been assigned as Coordinator/Owner by the Portal Administrator.

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

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

Dashboard Columns

Child Status	Details	Topic	QR	Faculty	Presentations & COI Status	Target Audience
PENDING	Series Name: Past RSS Activity - Merge Field Testing Monday, January 27, 2025 9:00 AM - 10:00 AM Location: N/A Department: N/A Parent ID: 9800 Child ID: 9891	Past RSS Activity - Merge Field Testing - 1/27/2025 	Single Scan QR Scan In/Out QR	Manage Faculty (2) Thomas M Welch, PharmD Disclosure submitted: 8/22/2024 Disclosure: Nothing to disclose - 08/22/2024 Caitlin Woods, MD Disclosure submitted: 12/6/2024 Disclosure: Nothing to disclose - 12/06/2024	Thomas M Welch, PharmD Upload Presentation Caitlin Woods, MD Upload Presentation	Specialties • Critical Care Medicine Professions • Physician
INCOMPLETE	Series Name: EAHEC RSS Sunday, February 4, 2025 10:00 AM - 11:00 AM Location: N/A Department: N/A Parent ID: 9349 Child ID: 9351	EAHEC RSS - 2/4/2025 	Single Scan QR Scan In/Out QR	Manage Faculty (0)		
APPROVED	Series Name: Future RSS Activity - Merge Field Testing Saturday, March 8, 2025 7:00 AM - 8:00 AM Location: N/A Department: N/A Parent ID: 9883 Child ID: 10722	Another Child 	Single Scan QR Scan In/Out QR	Manage Faculty (1) Thomas M Welch, PharmD Disclosure submitted: 8/22/2024 Disclosure: Nothing to disclose - 08/22/2024	Thomas M Welch, PharmD Upload Presentation	Specialties • Critical Care Medicine Professions • Physician

INCOMPLETE
PENDING
IN REVIEW
APPROVED
REJECTED

RSS Dashboard Columns

Each session in your series will be displayed on screen based on your search criteria. This is a brief overview of what you'll find.

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**. The Child ID will be used as an Activity Code to give to learners to text to the system to claim credit. In CloudCME, the Series Name is known as the Parent Activity.

Topic - This column displays the name of the RSS child activity as well as the option to edit, create a flyer, view recurrence settings, and deactivate the activity. In CloudCME, the Child Activity represents the session in the series, and the topic is the name of the session.

QR - This QR code can be scanned by users logged in to the CloudCME® mobile app. Single Scan QR is used for recording attendance. Scan In/Out QR will not record attendance, only time spent at an activity. UCSF uses only Single Scan QR codes for recording attendance at RSS.

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 display beneath each faculty name along with their disclosure submission date.

Presentation & COI Status - This column displays the faculty's COI status, as well as icons to **Upload**, **Download** and **Remove** a faculty presentation.








Target Audience - This column displays the Specialties and Professions that were selected during the parent activity setup. These can be revised on the RSS child editor when the Pencil Icon is selected.

Owners/Coordinators - This column displays the activity Owner and Coordinator names, as well as the option to send them an email.





Comments - This column gives Activity Administrators and Administrators the ability to add comments, which will populate into the comments pop-up window within the **COI Mitigation Manager** screen.

Approval - This column gives only Administrators and Activity Administrators the ability to override and approve a child activity. **NOTE** Once a child activity is approved, this approval cannot be reversed. Most of you will not see this column, so if the occasion arises where an override is necessary, please contact the Office of CME.

Status Icons

	Incomplete: No faculty or no current disclosure	INCOMPLETE
	Pending: Disclosure complete, but no COI	PENDING IN REVIEW
	Approved: All relationships mitigated	APPROVED
	Rejected: Relationships immitigable	REJECTED
	Upload: Upload a presentation	
	Download: Download a presentation	
	Delete: Delete the presentation	

Presentations & COI Status

	Thomas M Welch, PharmD Upload Presentation	
	Callin Woods, MD Upload Presentation	

In the Presentations and COI Status column, any faculty assigned to the session, as well as the status of their presentation materials, is assigned an icon to describe their current status.

Incomplete - This status represents faculty who have not been assigned to the activity, the speaker has no disclosure on file, or the disclosure on file has expired. You will see a child status of INCOMPLETE by default until faculty are assigned and disclosures have been completed.

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 Office of CME when the RSS status changes to PENDING to help coordinate review.

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 the other faculty members have been approved, the Activity Status will remain IN REVIEW until all faculty are approved. The change from PENDING to IN REVIEW means the COI Mitigation process has begun.

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 faculty have nothing to disclose.

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 REJECTED the coordinator will remove this faculty member,

select a new faculty member, and begin the process again or remove credit from the session.

The last three icons apply to the faculty member's presentation.

Upload – Allows you to upload a presentation file for the faculty member.

Download – Allows you to download the presentation file for the faculty member.

Delete – Allows you to delete the presentation file for the faculty member.

Faculty Management

The screenshot displays the 'Faculty Management' interface. On the left, a 'Faculty' sidebar shows a list of two members: Thomas M Welch, PharmD and Callin Woods, MD. Each entry includes a 'Manage Faculty' button, an envelope icon for email, and a minus icon for removal. The main area shows a detailed view of the 'Manage Faculty' pop-up for the session 'Manage Faculty for Past RSS Activity - Merge Field Testing - 1/27/2025 (9881)'. This view includes a table of faculty members with columns for Full Name, Email, Disclosure Date, and Disclosure. Below the table is a section to 'Email Selected Faculty' with fields for 'Enter Subject' and 'Enter email content', and an 'Email' button.

Full Name	Email	Disclosure Date	Disclosure
<input type="checkbox"/> Thomas M Welch IV, PharmD, Prof Designation	twelch@cloud-one.com	8/22/2024	Nothing to disclose - 08/22/2024
<input type="checkbox"/> Callin Woods, MD	callin.woods@healthstream.com	12/6/2024	Nothing to disclose - 12/06/2024

The Faculty column allows for assigning faculty members and managing conflicts of interest.

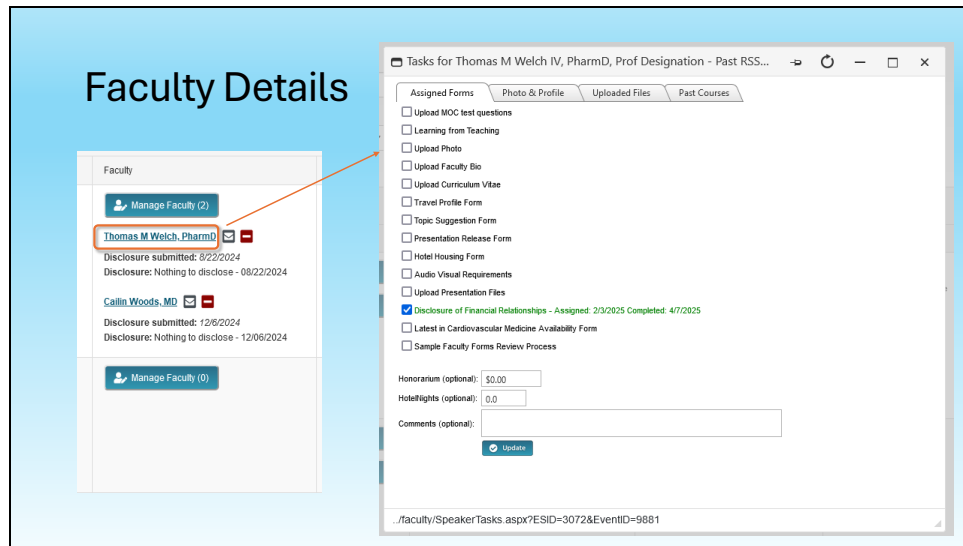
You can draft and send an email to the selected faculty member using the envelope icon. You can also simply remove the presenter from the session using the Minus button.

Select the Manage Faculty button to open a pop-up to add, delete, or view faculty member information.

Click the Add Faculty button to add another presenter to the session or use the minus icons to delete a speaker.

The Request Disclosure and Request Presentation checkboxes will assign the appropriate forms to added faculty members.

Click Email Selected Faculty to send a customized email to those who have been checked above.



Clicking on the faculty member's name will open the speaker configuration popup.

Here you can assign or unassign forms, view or upload a photo and profile, see uploaded files by the speaker, as well as past participation in other activities.

Click the "X" in the upper right to close the window.

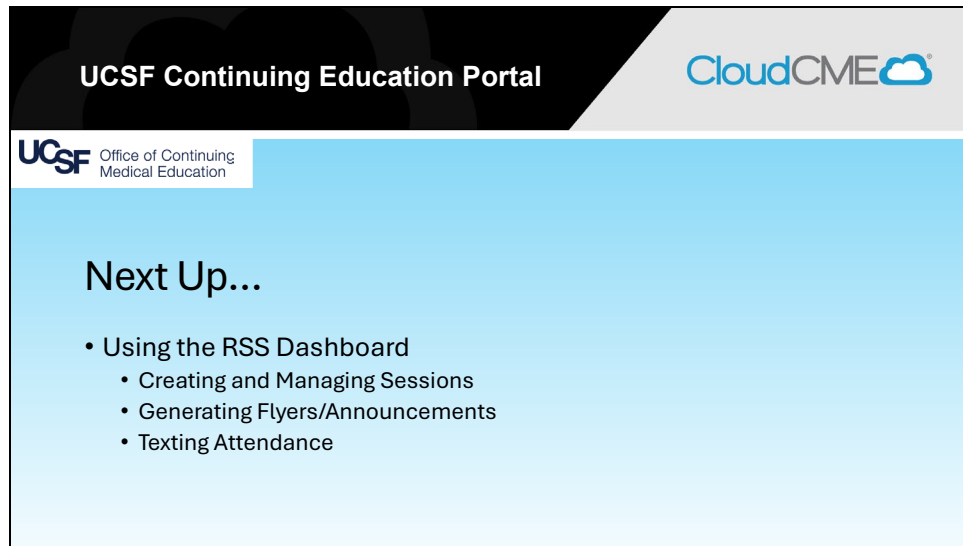
Status Control Columns

Owners / Coordinators	Comments	Approval
<div><div>Send</div><div>Owners:<ul style="list-style-type: none">Thomas WelchThomas WelchCallin Woods</div><div>Coordinators:<ul style="list-style-type: none">Jennifer Ott</div></div>	<div>Comments (0)</div>	<div>Approve Child</div>
<div><div>Send</div><div>Owners:<ul style="list-style-type: none">Thomas Welch</div></div>	<div>Comments (0)</div>	<div>Approve Child</div>

The SEND button in the Owners/Coordinators column allows you to draft and send an email to all those listed in the box.

The COMMENTS button will only appear for system administrators and Activity Administrators in order to add or view comments regarding mitigation of financial relationships or other notes.

The APPROVE CHILD button in the final column allows system administrators and Activity Administrators to override approval of a session or child activity. Once approved, the button will display as APPROVED. If this feature is not available to you, and you need help getting a session approved, please contact the Office of CME Support Team.



Thank you for joining this quick tour of the UCSF Continuing Education Portal RSS Dashboard.

Look for the next module in the series: Using the Dashboard to Manage your Series.



