

UCSF Continuing Education Portal



Quick Live Activity Setup III - Opening Registration

This guide will not apply to you if your activity does not require pre-registration or the use of OCME's e-commerce functions.

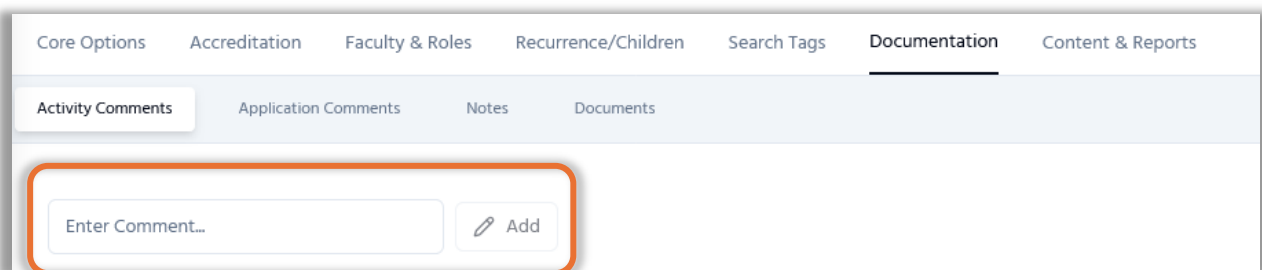
This guide will cover the following topics. Click a title below to jump to a specific section.

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Publish Your Enrollment Information

1. Sign in and navigate to your activity in the Activity Manager.
2. Open the [Core Options > Marketing](#) sub-tab. Use the template on the last page to start the “Registration” section of your *Course Details* page if it’s not already included, then customize as needed.
3. You can add or delete columns and rows in the fees table as needed. You can also add additional instructions before or after the fee table. The fees table should be deleted if the activity is not charging participants or if there is a single fee for all participants.
4. Once you have completed the [Registration Information](#), submit a [Registration Setup ticket](#) to advise OCME that you’re ready to open registration. This will trigger the creation of “products” and a registration form as well as a quick site audit.
 - a. If your activity is complimentary and does not need e-commerce services, this and the following step do not apply.
 - b. The information you enter in [Registration Information](#) will be used to create purchase options in the e-commerce system. You will be advised when it is operational.
 - c. If registration and payment processing will NOT occur in the CE Portal, you will need to set up external registration. See below.



The screenshot shows the CE Portal interface. At the top, there are tabs: Core Options, Accreditation, Faculty & Roles, Recurrence/Children, Search Tags, Documentation (which is selected), and Content & Reports. Below these, there are sub-tabs: Activity Comments (selected), Application Comments, Notes, and Documents. In the 'Activity Comments' section, there is a text input field with the placeholder text 'Enter Comment...' and an 'Add' button with a pencil icon. This entire section is highlighted with an orange border.

If there is registration information that will not (or should not) be published on the *Course Details* page, such as discount or promotional codes, daily fees, add-ons like lunches, dinners, or social events, or “secret” fees for certain professionals or UCSF MyAccess users, leave a note in the [Activity Comments](#) area of your activity.

- d. Navigate to [Documentation > Activity Comments](#).
- e. Add a new note with details for registration setup and click [Add](#).

Note that if you make any changes to registration information that involve fees or dates, you MUST contact OCME to ensure the e-commerce system stays in synch. Submit a support ticket from the CE Portal’s HELP page.

Registration Not Managed by OCME

1. Navigate to [Core Options > Marketing](#).
2. Scroll down to **External Registration**.
3. Enter the URL to be used for enrollment.
4. The REGISTER button will appear on the *Course Details* page and will redirect learners to the non-OCME site.
5. Note that learners will not be placed on the roster of participants for the activity, so the process of recording attendance manually and/or learners self-claiming credit is the only way to issue a certificate.

Vanity URLs

This section is used to edit URLs that will be used on an external site (outside of CloudCME) or printed material. This is useful for creating user-friendly URLs used in communications.

- **URL** - Type the short, friendly name in the field next to the main URL
 - Your input should not have any spaces. Consider something easy for people to remember, like <https://ucsf.cloud-cme.com/mycourse2025>
 - If you will be using the same token for annual activities, be sure to include a year or some other identifier to avoid redirecting learners to the previous course!

How it Looks on the Course Details Page

Credits

AMA PRA Category 1 Credits™ (1.00 hours), Non-Physician Attendance (1.00 hours)

Registration

Example 1:

Course Number: XXXnnAAAAAn account in the UCSF CE Portal is required to register. Click SIGN IN in the menu bar and enter your email address or UCSF MyAccess credentials to complete your profile and continue with registration. Your profile must include your degree and profession to be able to claim credit.

Registration Fees

Registration Category	Fee Before MM/DD/YYYY	Fee After MM/DD/YYYY
Physicians	\$\$\$	\$\$\$
Nurses/APPs/Other Health Care Professionals	\$\$\$	\$\$\$
Residents/Fellows	\$\$\$	\$\$\$
Industry	\$\$\$	\$\$\$

Registration will close on MM/DD/YYYY at HH:MM Pacific Time.

Additional Fees or Information:

While waiting for registration to open, you can move on to managing faculty. Choose the correct pathway below:

Part 4a - Assigning Faculty to a **Course**

Part 4b - Assigning Faculty to a **Series**

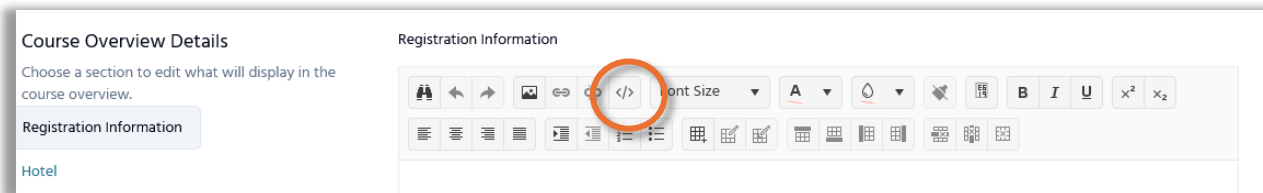
Registration Information Templates

How to find them:

Review the four example templates at <https://ucsf.cloud-cme.com/marketing-templates>.

How to use one:

1. Choose one of the templates that best meets your needs:
 - a. Early/Regular Fees
 - b. One fee only
 - c. Early/Regular/Onsite Fees
 - d. Different fees for onsite vs livestream
2. Copy the HTML code below your selected example to your clipboard.
3. Navigate to the **Registration Information** section of the **Marketing** tab in CloudCME.
4. Click the `</>` icon in the text editor and paste the code in the box. Click **Update**, then customize your information using the WYSIWIG editor.



5. Be sure to click **Save Changes** at the bottom of the page.