



UCSF Continuing Education Portal



Marketing Your Course on the OCME Website, and Beyond

Introduction

Should you choose to publicize your course on the OCME "calendar," you'll want to ensure that your event looks sharp. There are two places in the CE Portal where potential registrants will see your activity. The LIVE COURSE listing page displays brief summaries of each activity (in date order), and the Course Details page provides all the information your learners need to know in order to register and participate.

On the administrative side of CloudCME, most of this information is "pulled" from the Core Options tab and all its subtabs. Most subtabs will be completed for you as part of the application or activity build-out process, so you will mainly focus on the Marketing and Portal Overview subtabs of Core Options. This guide will also review additional promotional options through OCME.

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BASIC OPTIONS

1. Core Options > Marketing

- a. Course Overview Details Note: any tab left blank will remove a section or tab from the Course Details page.
 - Registration Information: adds a "Registration" Section to the Course Details page
 - ii. Hotel: adds a VENUE tab to the Course Details page
 - iii. Sponsors: adds a SPONSORS tab to the Course Details page
 - iv. Exhibitors: add an EXHIBITORS tab to the Course Details page

2. Core Options > Portal Overview

- a. Portal Description: adds detailed description to Course Details page (OVERVIEW tab)
- b. Attendee Portal Synopsis: adds a brief description to the Course Listings page

ADVANCED OPTIONS

1. Core Options > Marketing

- a. Brochure: generates a flyer/syllabus front material automatically; can be replaced with an actual activity brochure; adds a BROCHURE tab to the Course Details page.
- b. Visibility Options
 - i. Internal employee only: hides activity from those without a MyAccess account
 - ii. Hide activity from search engines: prevents activity from being discovered by webcrawlers or search engines

c. CME Passport

- Include on CME Passport: adds the activity to ACCME's CME activity listings
- ii. You must specify to whom the activity is available.
- iii. You must specify if there's a registration fee or not (or if its variable based on audience)

2. Core Options > Portal Overview

- a. Activity Listing Thumbnail: replaces the default image on the Course Listings page with a customized one (320px X 320px, max 500KB in size)
- b. Activity Details Page Banner: replaces the default banner on the Course Details page with a customized one (1500px wide X 320px tall, max 500KB in size)

- c. External Registration URL: redirects registration from CloudCME to another registration system if not using OCME's e-commerce services.
- d. Vanity URL: allows the creation of a tiny-URL-type listing, such as https://ucsf.cloud-cme.com/mycourse2025

3. Search Tags

- a. Specialties: displays the target specialties on the Course Listing and Course Details and facilitates searching for activities by specialty
- b. Professions: displays the target professions on the Course Listing and Course Details and facilitates searching for activities by profession
- c. Search Flags: adds searchable keywords by which people can search for the activity
- 4. Exhibitor Wizard: adds promotional packages to EXHIBITORS tab for purchase
 - a. If you are using exhibitor registration in the system, toggle the Exhibitor Registration Active Quick Action to on, once your products are set up.
- 5. **Reports > Finance/Registrations**: email registrants for an activity (or past activity); filter by pay status or attendance status; sort by name or date.

Email Blasts through OCME: submit a support ticket if you'd like to explore marketing to the OCME learner database. Fees apply.

Marketing Tab Templates



HTML Templates are available to paste into the **Core Options > Marketing** editor boxes to ensure consistency of presentation.

Navigate to https://ucsf.cloud-cme.com/course/courseoverview?P-5&EID=15251 and select the appropriate tab to find content for each section in the Course Details Overview. We recommend using code of content directly from the website to ensure you have the latest version(s).

Templates Available

OVERVIEW – Find four different examples to populate the **Registration** section, some with multiple fees by professions and dates, as well as icons for indicating virtual or hybrid course options.

VENUE – Find two different examples to populate the **Hotel** section, with and without photos, as well as code to advertise airline discounts. Submit a Support Request to add or update location photos. Upload photos you'd like to include, or photos from OCME's stock library will be used.

EXHIBITORS – Use standard language to invite your exhibitors to your activity. Note that Exhibitor/Promotion packages are automatically generated by the Exhibitor Wizard in CloudCME administration.

SPONSORS – Instructions to add logos or text to acknowledge other organizations involved in the planning, delivery, or funding of the activity. **Note this tab should not be used for exhibitors or commercial supporters.**

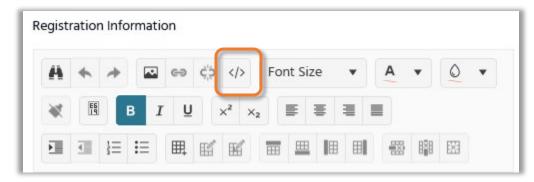
COMMERCIAL SUPPORT – Use standard language to invite grantors to support the activity.

CONTENT & TESTS – Find downloadable placeholder images for thumbnails and banners to include on your Course Listing and Course Details pages. There are four options available.

How to Use Marketing Templates

To Use the Templates, select an example you'd like to use. You will find a section at the bottom of each labeled "HTML CODE:".

- 1. Copy the ENTIRE coding to your clipboard from the website.
- 2. In CloudCME, select the Course Overview Details tab to update.
- 3. Select the HTML </> button to open the HTML editor.
- 4. In the popup window, click CTRL+A or CMD+A to select all the text, then CTRL-V or CMD-V to paste the new code.



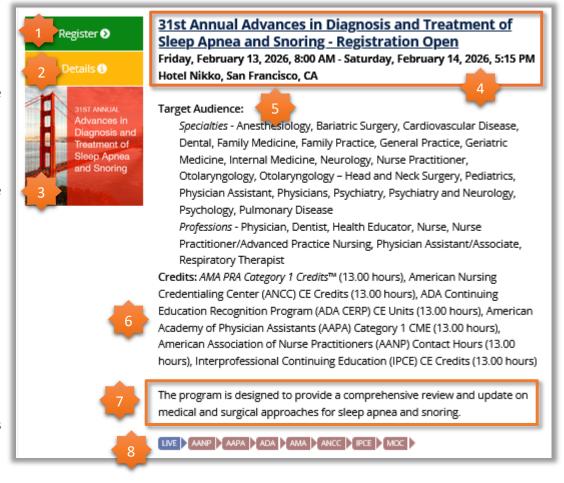
- 5. Click Update to return to the editor.
- 6. Complete the details appropriate to your activity.
- 7. Click Save Changes at the bottom of the screen.

Populating your Course Listing

Following are samples of how your course will look on the website and where the information comes from.

The Course Listing on the OCME calendar of events will automatically populate from information entered in the Activity Editor of CloudCME.

- The Register
 button will appear
 when the
 Registration Active
 toggle is switched
 on.
- 2. The **Details** button will almost always appear to navigate to the Course Details page.
- Core Options > Portal Overview (Thumbnail)
- 4. Core Options > Basic Information
- 5. **Search Tags** (Specialties, Professions)
- Core Options > Credits & Sessions
- Core Options >
 Portal Overview
 (Attendee
 Synopsis)
- 8. Core Options > Types & Formats; MOC; Search Tags



When a user clicks on the thumbnail or course title, they will be redirected to the Course Details page. Following are descriptions of the various fields that are shown on that screen.

Populating Your Course Details

When complete, the Course Details page includes all the details for learners. The Course Details tabs (banded by a purple box) are automatically generated as information is populated for the course. This allows you to publish an activity on the calendar and fill in the details as they become available.

The OVERVIEW tab includes information about when and where the course takes place, as well as any marketing information included; registration information; accreditation information; and some additional information about the venue, exhibitors, commercials support, and even the syllabus. (The Overview tab is always shown, even if there's no content.) This is populated by Core Options > Marketing and Core Options > Portal Overview.

The REGISTER tab only appears once the Registration Active toggle is set to on. This information is completely controlled by the system and guides the participant through the enrollment/payment process.

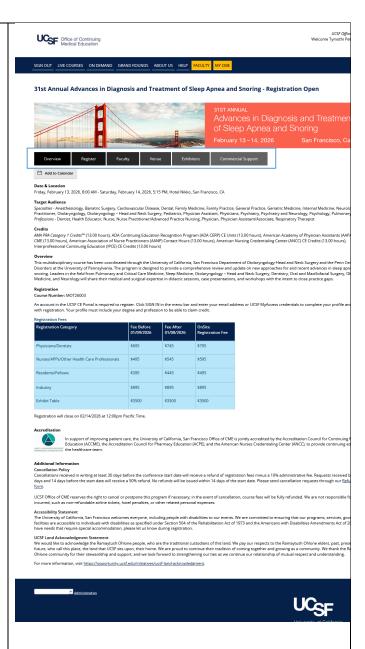
The FACULTY tab will appear once planners or faculty have been added to the activity in Faculty & Roles.

The VENUE tab will appear if information is entered in Core Information>Marketing>Hotel.

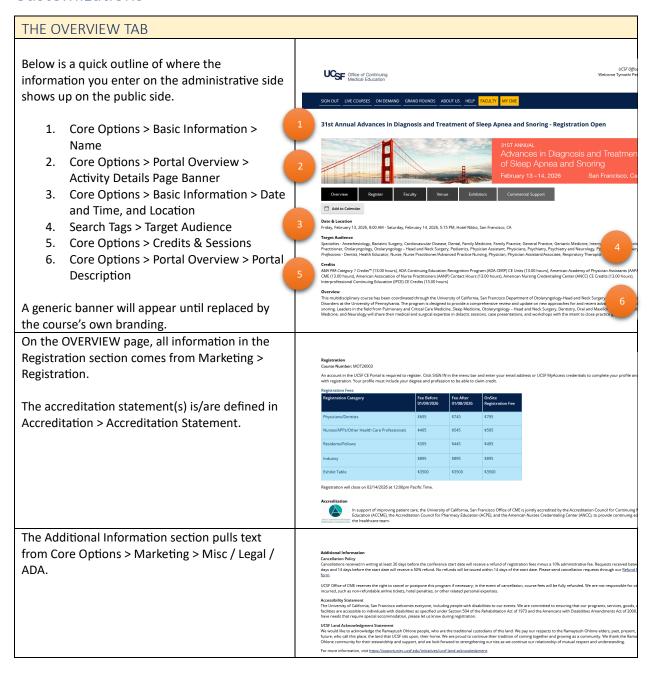
The $\overline{\mbox{EXHIBITORS}}$ tab will appear if information is entered in $\mbox{\bf Core}$

Information>Marketing>Exhibitors.

The COMMERCIAL SUPPORT tab will appear if information is entered in Core Information>Marketing>Commercial Support.



Customizations



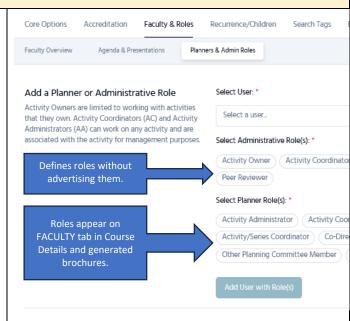
THE FACULTY TAB

This tab is automatically generated by the system, and shows any individual that has a **Planner** Role as defined in Faculty & Roles > Planners & Admin Roles.

To restrict this display to committee members or chairs only, it is best not to assign a conference manager or coordinator to a Planner Role. Also, any role assigned in the Planner section to an individual will appear on the Faculty tab.

To avoid roles like "Activity Coordinator" or "Peer Reviewer" showing up in the faculty list, assign individuals to those roles in the Administrative Role section only.

Note that Activity Coordinator and Activity Administrator are meaningless for live activites. This is used for regularly scheduled series primarily.



THE VENUE TAB

The VENUE tab populates from the information entered in Core Options > Marketing > Hotel.

This is an HTML box that can be highly customized. A template is available, though, to get you started.

Once the template is copied and filled out; you can request photos to be inserted by submitting a Support Request.



THE EXHIBITOR TAB

The EXHIBITORS tab populates from the information entered in Core Options > Marketing > Exhibitors.

This is an HTML box that can be highly customized. A template is available, though, to get you started. The information from that field is shown in the orange box to the right.

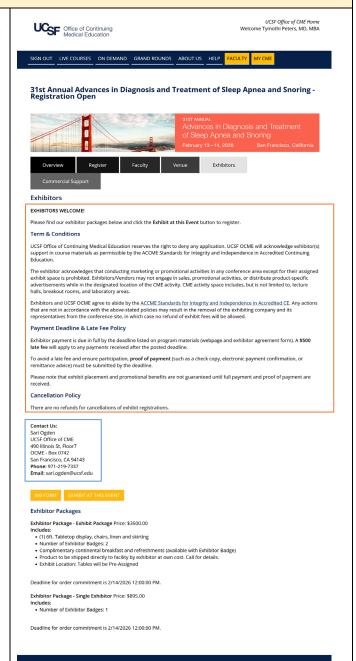
The contact information (banded in purple on the right) is pulled from information entered in the Exhibitor Wizard.

At the bottom of the customized information will be one or two buttons:

- 1. W-9 Form to download UCSF's W-9
- 2. Exhibit at this Event (if Exhibitor Registration is open)

These buttons are automatically generated.

Below that are the Exhibitor Packages for purchase. These are also automatically generated based on your setup in the Exhibitor Wizard.







THE COMMERCIAL SUPPORT TAB

This is the default information entered on the Commercial Support tab if the activity is seeking grants.

This is a standard template regarding UCSF CME's policies around solicitation, collection, and management of commercial support from ineligible companies.

The COMMERCIAL SUPPORT tab populates from the information entered in Core Options > Marketing > Commercial Support.

This is an HTML box that can be highly customized. A template is available, though, to get you started.

We recommend you not adjust this information if it was pre-populated for you.



OTHER SPECIALTY TABS

Though not shown in this example, when presentations are uploaded to the system, they will automatically appear within the SYLLABUS tab. It will only appear at the start of the activity when presentations are uploaded AND the Agenda/Syllabus Published toggle is switched on.

This is an easy way to make slides available to attendees without a lot of intervention.

You can also download all uploaded presentations to a ZIP file for your AV technicians.

The **BROCHURE** tab will only appear once a brochure has been generated or uploaded in **Core Options > Marketing > Brochure**. It links directly to a downloadable PDF.

The **SCHEDULE** tab will appear when an agenda is created in **Faculty & Roles > Agenda & Presentations** AND when the **Agenda/Syllabus Publish** toggle is switched on.

The SCHEDULE tab shows a grid of presentations by day. If a presentation or handout was uploaded to the presentation, it will show here as well.

Overview Register Faculty Brochure Venue Exhibitors Commer

Overview Register Faculty Schedule Content and

Tuesday, October 21, 2025 Wednesday, October 22, 2025 Thursday, October 23, 2025 Friday, October **CONTENT AND TESTS** appears when a pre-test, Module 2 Basic Faculty Management 3:10PM - 4:00PM Tymothi Peters, PhD Module 2 Basic Faculty Management post-test, or other enduring content is attached to the activity. This is used primarily in "blended" Module 2 Basic Faculty Management 10:10AM - 11:00AM Tymothi Peters, PhD activities that have a non-live component. Please submit a Support Request if you need such a module added to your course. Saturday, October 25, 2025 Sunday, October 26, 2025 Monday, October 27, 2025 Module 2 Basic Faculty Management 12:10PM - 1:00PM Tymothi Peters, PhD