

UCSF Continuing Education Portal



Transcripts Report

The Transcripts report allows users the ability to generate transcripts based on various criteria and filters.

This report is used by CE/CME administrators and accreditation staff to:

- View credits awarded for one or multiple activities for one or multiple learners
- Prepare transcripts for export or print for department files
- Prepare transcripts for export or print for learners

Accessing the Transcripts Report

1. Sign in to the CE Portal; scroll to the bottom to select **Administration**.
2. From the main menu, select **Reports**, then **Transcripts**.

Viewing Data

Select the appropriate filters and options on the **Options & Search** tab, then click **Search** or **Generate Transcripts** to generate the transcript report.

The screenshot shows the 'Options & Search' tab for the Transcripts report. It includes a 'View Complete Transcripts' checkbox, a 'Search Existing Users' section with filters for Activity Name, Activity Type, Specialty, Degree, Employment, Areas of Interest, Department, Location, Roles, and Profession. There are also date range filters and a 'Generate Transcripts' button.


1. Search for your **Activity Name**, or search by **Activity Type**, learner **Specialty**, or **Degree**.
2. Select to view learners' **Complete Transcripts** or **Only Credits Awarded within a Date Range**.

☐ **View Complete Transcripts**

Search Existing Users

Attended Activity

Activity Name...

☐ Parents Only 

☒ **Only return users with credits between these two dates:**

Between and

Figure 1. Transcript Search Options

View Complete Transcripts (unchecked by default)

When running the transcript report for a specific activity, by default, the transcripts generated will only display the credits for the activity selected. To view the attendees' full transcripts when generating the report, check **View Complete Transcripts** first, then select the activity and any other criteria needed for the search.

Only return users with credits between these two dates (checked by default)

This option is checked by default. To view the transcripts for users regardless of credit between the dates listed, uncheck this option.

- Filter by **Department**, **Location**, individual **Roles**, or **Profession** if needed or desired.

Department	Location	Roles	Profession
<input type="text"/>	<input type="text"/> <input type="button" value="▼"/>	<input type="text"/> <input type="button" value="▼"/>	<input type="text"/> <input type="button" value="▼"/>

- Filter by geography if desired by selecting one of the available options.

☐ ALL ☒ US ☐ Non-US ☐ Only include users internal to your organization

- Click **Search**.

6. You can also find a transcript for a single learner by searching their name.

OR find a transcript for one individual using last name lookup:

- The transcripts for individuals who meet the search criteria will be listed on the **Transcripts** tab.

Options & Search

Transcripts

1

of 85

Export to the selected format

Export

CloudCME

Derek Kuhlman
TN
UNITED STATES

Transcript Period 1/1/2007 to 11/11/2022

Created On: 11/11/2022

Transcript Credit Summary:

AMA PRA Category 1 Credits™: 1.00 Credits

General Attendances: 1.00 Credits

Credit Type: AMA PRA Category 1 Credits™

Total: 1.00

ID	Session	Activity Name/Date	Activity Format	Credits	Claim Date
1342	testingoption al	Option evals/tests testing, November 18, 2020	Live Activity		
		General Session, November 18, 2020		1.00	10/22/2020

0

of --

Export to the selected format

Export

Click **Export to the selected format** to select a format for downloading purposes. Click the **Export XLS** button to download an Excel spreadsheet or print the report by clicking on the print icon.