



Coordinators Training Manual for Regularly Scheduled Series (RSS)

Joint Providers

CloudCME v. February 2020
RU v. September 2020

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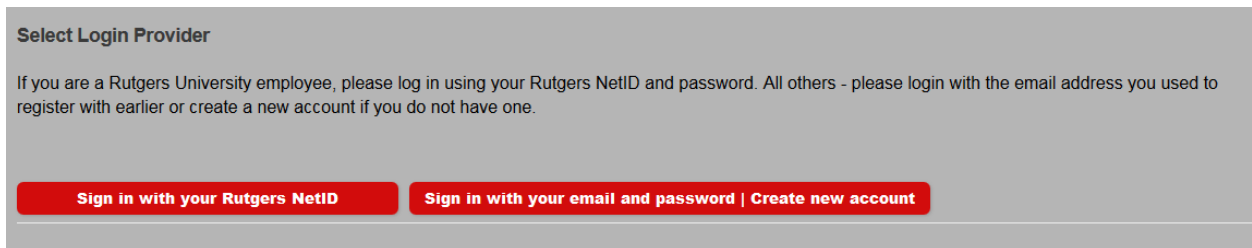
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RSS Dashboard Introduction

CloudCME® offers the RSS Dashboard to assist in easily managing individual RSS sessions or children, as they are often referred to. Via the RSS Dashboard, you can enter in the child activity title, location, objectives, and specialties, assign faculty, manage faculty disclosures and upload faculty presentations.

First, go to <https://rutgers.cloud-cme.com/> and log into CloudCME® by clicking “Sign in with your email address and password,” enter your email address, password and click the Login button.

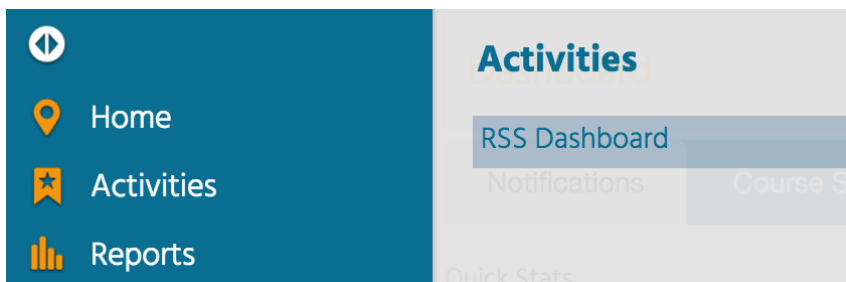


On the lower-left hand side of the screen, you will see a field with “Administration.” Click on the word “Administration.”



NOTE: An Administrator must assign permission to your account in order for you to view this screen. If you do not see “Administration” or have access to the RSS Dashboard (see below), please contact Elizabeth Ward (elizabeth.s.ward@rutgers.edu / 973-972-3605), Sandie Gallt (galltsa@rbhs.rutgers.edu / 973-972-0076) or Patrick Dwyer (patrick.dwyer@rutgers.edu / 973-972-8377).

Select Activities from the main menu and then select RSS Dashboard from the sub-menu. This screen may vary depending on what access you have been given.



RSS Dashboard

Instructions: This screen shows upcoming RSS. If faculty or disclosures are missing the activity is considered incomplete, cannot be approved and credit cannot be awarded. You can edit the activity by clicking its name. To assign faculty, enter a lastname and select a user from the dropdown, then click Add. If no disclosure is on file, the faculty member will be contacted by email to complete it. Use the date selectors if you need to view a different time frame.

☐ Day ☐ Week ☒ Month Status: All

Status	ID	Series	Topic	Date	Location	Faculty	Disclosure	Upload Presentation	Objectives	Audience
--------	----	--------	-------	------	----------	---------	------------	---------------------	------------	----------

RSS Icons

There are icons in three columns of the RSS Dashboard: Status, Topic and Faculty, and below is the purpose of each icon.

Status column - This column contains a status icon. As the planning process continues through the approval state, the icon displayed in this column will continue to update. **NOTE:** Please refer to the RSS Status Definitions below for a description of each status meaning.

PENDING

Topic column - The first icon is that of the handout. While we will not be using this to generate the handout (flyer), you will use this to upload the flyers that you create for each session.

NOTE: Please refer to **Appendix I – Uploading the Flyer**.



The second icon is that of the calendar. Click this icon and the calendar will display for you to view and access the scheduled RSS child activities.



Lastly, is the trash can icon. Click this icon to deactivate an RSS child activity. A message will display asking you to explain the reason why you are deleting the RSS child activity. Enter text and click **Add Note**.



Faculty column - This column contains three icons for your use. The first is the green plus icon. Once you have selected the faculty member from the drop-down list, click this icon to add the user as a faculty member for this RSS child activity.



Once a user has been added as a faculty member, two additional icons display. The first is an envelope icon. Click this icon and a pop-up window will display for you to create an email message to send to the faculty member.



Lastly, you see a red minus icon. Click this icon to remove a faculty member from the RSS child activity.



Upload Presentation column - An icon displays in this column when one or more faculty have disclosed a financial relationship in the disclosure form. This icon signals to upload the faculty member's presentation so that the peer review process can begin.



RSS Status Definitions

Incomplete: This status means that faculty and disclosure have not been assigned yet. Coordinators/Owners will see Incomplete by default until faculty have been assigned and disclosures have been completed. This is the initial default status of every RSS child activity.

Pending: This status represents faculty who have completed a disclosure and there was no financial relationship declared (i.e. no financial relationships were disclosed or conflict of interest was resolved).


In Review: This status represents faculty who have a completed disclosure and at least one financial relationship has been declared. The faculty member's presentation has been uploaded, triggering a formal review for identified conflict of interest to determine if resolution is needed.

Approved: This represents faculty who have completed a disclosure, either no financial relationships were declared or, if identified, resolution of conflict of interest has been satisfactorily completed.

Rejected: This represents faculty who have completed a disclosure, a financial relationship has been declared and the conflict of interest is not able to be satisfactorily resolved. The activity is rejected. The coordinator would remove this faculty member and would need to select a new faculty member and begin the process again.

The RSS Dashboard provides a minimized view to easily manage RSS activities. You will see all of the activities that you have been assigned as coordinator/owner **except** those that are approved unless Approved is selected in the Status search method.

There is a variety of methods to search the RSS Dashboard. You can search by frequency (i.e. day, week or month), date range or status.

 RSS Dashboard

Instructions: This screen shows upcoming RSS. If objectives, faculty, or disclosures are missing the activity is considered incomplete, cannot be approved and credit cannot be awarded. You can edit the activity by clicking its name. To assign faculty, enter a lastname and select, then click Add. If no disclosure is on file, the faculty member will be contacted by email to complete it. Use the date selectors if you need to view a different time frame.

☐ Day ☐ Week ☒ Month

3/31/2018

3/31/2019

Status: Pending ▼

In the screenshot below, you can see a date range has been entered and the Status is set to Pending. You can also search by changing the status to All, In Review, Incomplete, Approved or Rejected.

NOTE: Please see the section titled, "RSS Status Definitions" provided above for a definition of each available status.

Instructions: This screen shows upcoming RSS. If objectives, faculty, or disclosures are missing the activity is cannot be awarded. You can edit the activity by clicking its name. To assign faculty, enter a lastname and se member will be contacted by email to complete it. Use the date selectors if you need to view a different tin

☐ Day
 ☐ Week
 ☒ Month
 3/31/2018
 3/31/2019
 Status: Pending

 Export XLS

Status & ID	Series	Topic	Date	Location	Faculty
					Jennifer

Editing an RSS Child Activity

The data table below contains several columns of data to assist you in managing the activity planning process. Columns include: Status, ID, Series, Topic, Date, Location, Faculty, Disclosure, Upload Presentation, Objectives, and Audience.

☐ Day
 ☐ Week
 ☒ Month
 6/17/2019
 6/30/2020
 Status: All

 Export XLS Save Layout Reset

Status	ID	Series	Topic	Date	Location	Faculty	Disclosure	Upload Presentation	Objectives	Audience
						Email Faculty: <input type="checkbox"/>				
INCOMPLETE	Parent: 2190 Child ID: 2193	CCOE RSS Example	CCOE RSS Example - 6/23/2019	Sunday, June 23, 2019 1:00:00 PM - 2:00:00 PM	ADMC 7	<input type="text"/> <input type="button" value="+"/> Email Faculty: <input checked="" type="checkbox"/>	NO DISCLOSURE		1 this is obj 1 2 this is obj 2	

Click on the activity title (topic) that you wish to edit and the activity screen will display. You can now edit the detail and click the “Save” button.

RSS Activity Editor

Instructions: Change the title to reflect the topic of the session. If necessary, adjust hours and location. Specify objectives by clicking the + in the objectives grid. Check of specialties as they apply. When finished, click Save.

Name: M & M Case Conference - 3/10/2019

Location: [Dropdown]

Date/Time: 3/10/2019 12:24 PM to 3/10/2019 1:24 PM

Allow Texting Minutes Prior: 5

Allow Texting Minutes After: 720

ACCME Objectives

Objective 1: [Input Field]

Objective 2: [Input Field]

Objective 3: [Input Field]

Upload a file for this activity: [Input Field] [Select]

Check off the target audience for this RSS session.

<input type="checkbox"/> Anesthesiology	<input type="checkbox"/> Metabolic Bone	<input type="checkbox"/> Research
<input type="checkbox"/> Arthritis	<input type="checkbox"/> Nursing	<input type="checkbox"/> Rheumatology
<input type="checkbox"/> Arthroplasty	<input type="checkbox"/> Opioids	<input type="checkbox"/> Shoulder
<input type="checkbox"/> Arthroplasty	<input type="checkbox"/> Orthopaedics	<input type="checkbox"/> Shoulder
<input type="checkbox"/> Controlled Substances	<input type="checkbox"/> Otolaryngology	<input type="checkbox"/> Spine
<input type="checkbox"/> Foot/Ankle	<input type="checkbox"/> Pediatrics	<input type="checkbox"/> Spine
<input type="checkbox"/> Foot/Ankle	<input type="checkbox"/> Pediatrics	<input type="checkbox"/> Sports

[Save]

RSSWizard.aspx?EventID=454

This is the topic name for this RSS Session

You can edit the RSS child activity Name, Location, Date/Time, Objectives, and select the specialties that are the target audience for this activity. **DO NOT EDIT** the “Allow Texting Minutes Prior” and “Allow Texting Minutes After” fields. You should also ignore the “Upload file for this activity” section.

NOTE: The child activity title will appear on users’ transcripts as you have entered it into the field.

When all information has been entered, click the “Save” button.

Check off the target audience for this RSS session.

- ☐ Addiction Medicine
- ☐ Addiction Psychiatry
- ☐ Adolescent Medicine
- ☐ Allergy and Immunology
- ☐ Ambulatory Care Pharmacy
- ☐ Anatomic Pathology
- ☐ Anesthesiology
- ☐ Behavioral Health

[Save]

Begin to add your identified faculty (speakers) to your child activity in the Faculty column. Type in the first few letters of the faculty member's last name, select them from the drop-down list, and click the green + button .

NOTE: If the faculty (speaker) does not have an account in CloudCME® and the faculty (speaker) has a Rutgers NetID along with a Rutgers email address that he/she regularly accesses, please have him/her complete the following steps:

1. Go to: <https://rutgers.cloud-cme.com>
2. Click "Sign In" in the upper left corner of the screen.
3. Select "Sign in with your Rutgers NetID." ***Please be sure you sign in with your Rutgers NetID and Password; CloudCME is integrated with Rutgers Single Sign-On.***
4. Enter your Rutgers NetID and Password on the Central Authentication Service screen
5. Your profile screen will appear. Please complete your profile and click submit at the bottom of the screen.
 - a. If the profile screen does not appear, this means you already have an account. You can use this time to make sure your profile is up-to-date (Click "My CE" then "Profile" on the top menu bar to view your profile.)

NOTE: If the faculty (speaker) does not have an account in CloudCME® and does not have a Rutgers NetID or a Rutgers email address that he/she regularly accesses, you will need to add the faculty member to the system through the Membership Manager. See **Appendix II - Add Member**.







The screenshot shows the CloudCME interface with a table of activities. The table has columns: Status, ID, Series, Topic, Date, Location, Department, Faculty, Disclosure, Upload Presentation, and Objectives. A dropdown menu is open for the Faculty column, showing search results for 'Donnelly, Jennifer'.

Status	ID	Series	Topic	Date	Location	Department	Faculty	Disclosure	Upload Presentation	Objectives
PENDING	Parent: 448 Child ID:454	M & M Case Conference	M & M Case Conference - 3/10/2019	Sunday, March 10, 2019 12:24:16 PM - 1:24:16 PM			Donnelly, Jennifer (101) jdonnelly@multiweb.com Donnelly, Jennifer (386) jdonnelly@noemail.com	NO DISCLOSURE		

Once you click the green + button , you will see that the faculty member has been added to the child activity.




NOTE: You may see that the status in the Status column changes from PENDING to IN REVIEW. The status can change to IN REVIEW because the faculty member declared a financial relationship within their disclosure on file.

NOTE: By default, added faculty members will receive an email upon being added to the child activity. If the faculty member does not have a disclosure form in CloudCME, the email will contain a link to the disclosure form and request them to complete it. If the faculty member does not have a disclosure form in CloudCME, the email will ask them to revise their disclosure form if they have any new financial relationships. If you are using the same faculty members week after week and you know that there is already a disclosure form on file, you can uncheck the “Email Faculty” box before adding the faculty member so they do not receive an excessive amount of emails from CloudCME.


Date	Location	Department	Faculty	Disclosure	Upload Presentation	Objectives	Aug
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Sunday, March 10, 2019 12:24:16 PM - 1:24:16 PM			Jennifer Donnelly, MD   <input type="text"/>   Email Faculty: <input checked="" type="checkbox"/>	 Jennifer Donnelly, MD - NO DISCLOSURE	Jennifer Donnelly, MD  [NO FILE UPLOADED]		











If the faculty member declares that they have no financial relationships on their disclosure form, the status will update to PENDING and the RSS child activity is ready to be marked as APPROVED by the Activity Administrator (CCOE staff). Once approved, the status changes to APPROVED.

If the faculty member declared a financial relationship(s), this will be noted in the Disclosure column and the status will update to IN REVIEW.

Status & ID	Series	Topic	Date
<div>IN REVIEW</div> Parent: 14105 Internal Medicine Grand Rounds Jen's Test Child	Internal Medicine Grand Rounds Jen's Test	Stroke Update   	Sunc 2018 8:00:

If faculty have one or more disclosed financial relationships, you will be instructed to obtain and upload the presentation (PPTX, PPT or PDF), which then triggers a peer review form. Additionally, the status changes to IN REVIEW on the dashboard.

NOTE: Click the upload icon  in the Upload Presentation column to upload the faculty member's presentation for peer review. Please ensure your filename DOES NOT contain spaces or special characters. Filenames must be less than 100 characters long. Videos must be less than 4GB.


<p>IN REVIEW</p> <p>Parent: 14118 Medicine Grand Rounds, Child ID:14121</p>	<p>Medicine Grand Rounds</p>	<p>Medicine Grand Rounds - 4/10/2018</p> <p>  </p>	<p>Tuesday, April 10, 2018 7:00:00 AM - 8:00:00 AM</p>	<p>Karl Wilkens, NA  </p> <p>Jennifer Donnelly, DO  </p> <p></p> <p><input type="text"/></p> <p></p> <p>Email Faculty: <input type="checkbox"/></p>	<p>Karl Wilkens, NA: Speakers Bureau-Abbott Laboratories - Disclosure Submitted: 3/28/2018</p> <p>Jennifer Donnelly, DO: Speakers Bureau-Abbott Laboratories - Disclosure Submitted: 3/27/2018</p>	<p></p>	<p>Internal Medicine</p>
--	------------------------------	---	--	---	--	--	--------------------------



One or more relationships exist for Karl Wilkens. Please obtain the presentation for this faculty member and upload it to begin the peer review process.

OK

Once the faculty member's presentation has been uploaded, users who have a role of Peer Reviewer, receive an email with a link to the Peer Review form. **If the Peer Reviewer does not receive an email, please be sure they check their spam folder. If the email is in their spam folder, they should approve the sender.** The presentation title, faculty name, a link to the uploaded presentation, stated disclosures, and resolution questions are included within the form. Based on the question responses, this will change the status to Rejected or Pending.


<https://rutgers.cloud-sme.com/>

Thank you CCOE Test, MD for participating as a Peer Reviewer for Rutgers Biomedical and Health Sciences - CE. CCOE RSS Example - 6/17/2019 will occur on Monday, June 17, 2019 and we need you to review the content in order to resolve any actual or potential conflicts of interest. Please click the link to review the faculty, their presentation and their disclosure. [Click here to go to the Peer review form](#)

NOTE: The first peer reviewer that completes the review and Peer Review form is all that is needed. If additional peer reviewers try to complete the Peer Review form, they will receive a notification that the review has been completed and no further action is needed at this time.

NOTE: Your series has been set up with at least one peer reviewer. To add additional peer reviewers, please contact Elizabeth Ward (elizabeth.s.ward@rutgers.edu / 973-972-3605), Sandie Gallt (galltsa@rbhs.rutgers.edu / 973-972-0076) or Patrick Dwyer (patrick.dwyer@rutgers.edu / 973-972-8377).

Approving RSS Child Activities

In CloudCME®, RSS Coordinators/Owners *cannot* approve RSS child activities. An Administrator (CCOE staff) must approve the RSS child activities. RSS child activities will not be awarded credit unless an Administrator approves them. An Administrator cannot approve an RSS child activity without disclosures on file. Furthermore, if the faculty has a relevant financial relationship, an Administrator cannot approve the child activity until the presentation has been uploaded and the Peer Reviewer completed the Peer Review Form.

An RSS child activity must be in PENDING status no later than one (1) week prior to the session date. This means that speaker disclosures are on file, and that either there were no relevant financial relationships disclosed or that potential or actual conflict of interest was resolved through peer review.

Adding an RSS Child Activity

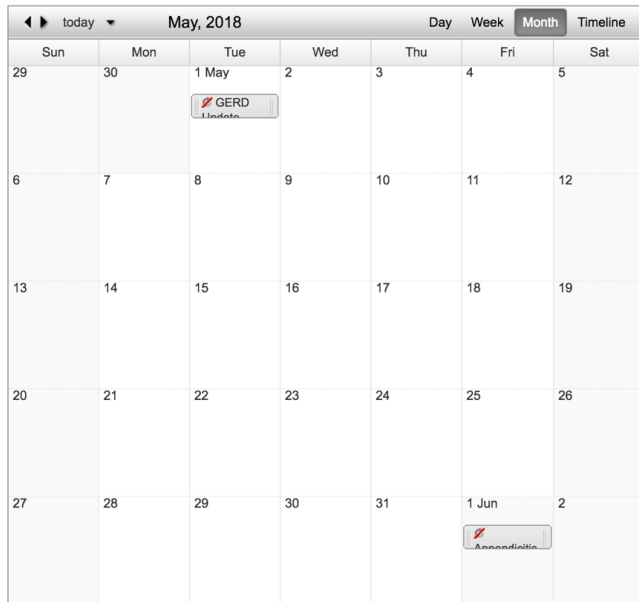
RSS Child Activities were set up based on the schedule information provided in your RSS application. If you need to add a new child activity, you can click on any calendar icon in the Topic column.

☐ Day ☒ Week ☐ Month

2/13/2019 3/13/2019 Status: Pending Owner:

[Export XLS](#) [Save Layout](#) [Reset](#)

Status	ID	Series	Topic	Date	Location	Depart
PENDING	Parent: 448 Child ID:454	M & M Case Conference	M & M Case Conference - 3/10/2019	Sunday, March 10, 2019 12:24:16 PM - 1:24:16 PM		



Double click on the date in the calendar for which you want to add a child activity.

Add title of the child activity and click Save.

The new child activity will now appear in the RSS Dashboard and you can edit the child activity details by clicking on the Topic (title) in the RSS Dashboard to open the RSS Activity Editor.

Disclosure Report

The Faculty Disclosure Report allows you to search for completed disclosures by activity or by individual. Searching by Activity will result in the most recent faculty completed disclosures displaying. If searching by Individual, you can choose to select a faculty member's disclosure by completion date or display all disclosures completed by a faculty member.

To view faculty disclosures, select **Reports > Faculty - Disclosures**.

Faculty

[Agenda & Disclosures](#)

[Disclosures](#)

[Faculty History](#)

[Faculty Reports](#)

[Faculty Schedules](#)

[Faculty Status](#)

Search for an activity name in the search field and select the activity name from the drop-down list to find disclosures associated by activity.

Disclosures

Instructions: Select an activity from the drop down list. Alternately, you can look up an individual by last name and if a disclosure has been submitted, it will display in the report. The report may take a minute to create. Please be patient. When finished you can export the report to several formats including PDF.

Activity:

ECHO - Pulmonary Fibrosis - CM184005

☐ All ☐ Parents Only

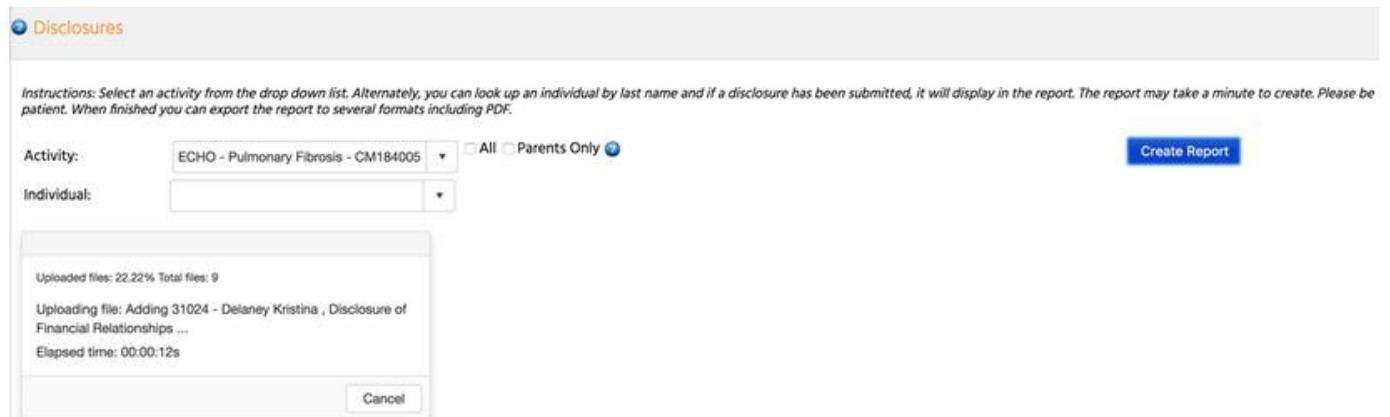
Create Report

Individual:

ECHO - Pulmonary Fibrosis

Once you select the activity, click Create Report.

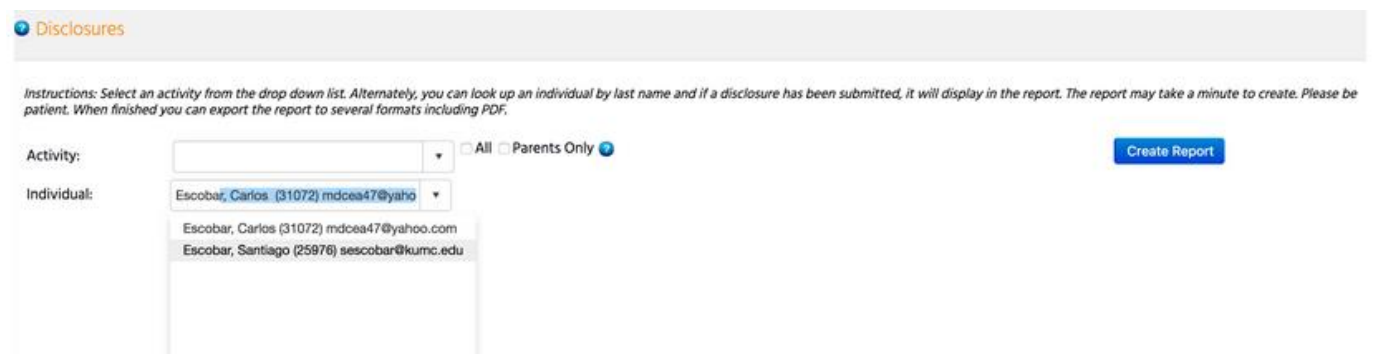
NOTE: Searching by an Activity will return all the activity faculty members' disclosures.



The screenshot shows the 'Disclosures' application interface. At the top, there's a header with the title 'Disclosures'. Below it, instructions state: 'Instructions: Select an activity from the drop down list. Alternately, you can look up an individual by last name and if a disclosure has been submitted, it will display in the report. The report may take a minute to create. Please be patient. When finished you can export the report to several formats including PDF.' The 'Activity' dropdown is set to 'ECHO - Pulmonary Fibrosis - CM184005'. The 'Individual' dropdown is empty. To the right of the 'Activity' dropdown are radio buttons for 'All' (selected) and 'Parents Only'. A blue 'Create Report' button is on the right. A modal window is open in the foreground, displaying progress information: 'Uploaded files: 22.22% Total files: 9', 'Uploading file: Adding 31024 - Delaney Kristina , Disclosure of Financial Relationships ...', and 'Elapsed time: 00:00:12s'. A 'Cancel' button is at the bottom right of the modal.

Once the report has finished, a PDF of the results will display. Click the Download PDF link and the report will display to allow you to review, download or print each faculty member's completed disclosure form.

To find an individual's disclosure, enter the last name in the Individual field.



This screenshot shows the 'Disclosures' application interface with search results. The 'Activity' dropdown is empty. The 'Individual' dropdown is open, showing a list of search results: 'Escobar, Carlos (31072) mdcea47@yaho', 'Escobar, Carlos (31072) mdcea47@yahoo.com', and 'Escobar, Santiago (25976) sescobar@kumc.edu'. The 'All' radio button is selected. The blue 'Create Report' button is visible on the right.

If the faculty member has completed multiple disclosures over time, you will see a message stating "Multiple submission were found. Click a date to view." Select the date of faculty member's disclosure you will like to access.

The screenshot shows the 'Disclosures' page. At the top, there's a header 'Disclosures'. Below it, instructions state: 'Select an activity from the drop down list. Alternately, you can look up an individual by last name and if a disclosure has been submitted, it will display in the report. The report may take a minute to create. Please be patient. When finished you can export the report to several formats including PDF.' There are two dropdown menus: 'Activity:' and 'Individual:'. The 'Individual:' dropdown is set to 'Escobar, Santiago (25976) sescobar@ku'. To the right of these are radio buttons for 'All' (selected) and 'Parents Only'. A 'Create Report' button is on the far right. Below the search fields, a message says 'Multiple submissions were found. Click a date to view.' followed by a date selector showing '11/13/2017 3:21:31' and a 'Show All' link. A dropdown menu is open showing three dates: '11/13/2017 3:21:39 PM', '2/1/2018 11:29:22 AM', and '2/6/2018 11:09:46 AM'.

The system will render the faculty member's disclosure that was completed on the date you selected.

You can select "Show All" and the system will render every completed disclosure for that faculty member.

A blue hyperlink is available for PDF format, "Download PDF." Additionally, you can download the file or print the file.

This screenshot shows the same 'Disclosures' page as before, but with the 'Show All' link selected. Below the search fields, a blue link 'Download PDF' is visible. The main content area now displays a PDF document titled 'Disclosure of Financial Relationships_ Santiago Escobar.pdf'. The PDF content includes the title 'Disclosure of Relevant Financial Relationships for Continuing Professional Education', an 'Instructions' section, and 'CRITERIA FOR DISCLOSURE OF FINANCIAL RELATIONSHIPS WITH COMMERCIAL INTERESTS IN CONTINUING EDUCATION (CME/CE)'. The criteria list three points: 1. Instructors, planners, content reviewers and managers who affect the content of a CME/CE activity are required to disclose financial relationships they have with commercial interests (i.e., any entity producing, marketing, re-selling, or distributing health care goods or services consumed by, or used on, patients). 2. Disclose financial relationships with a commercial interest relevant to the activity. 3. You are to disclose financial relationships that fit #2 above in any amount that has been received over the past 12 months ONLY. The PDF viewer interface shows '1 / 12' pages and icons for refresh, download, and print.

Attendance Recording - SMS Texting

Each individual will record RSS attendance by SMS text messaging using his or her mobile phone. In order for SMS text messaging to work, the following are necessary:

1. Users must have an active profile in CloudCME® and need their mobile phone numbers linked to their profile (See Step 1 below). If a user does not have a profile, it must be set up first.
2. The Child ID will need to be distributed at the RSS session. The Child ID can be found in the ID column in the RSS Dashboard.
3. Users must send an SMS text message and not an iMessage.
4. The SMS text message can only be sent during the session or 12 hours after the session.
5. The session must be in APPROVED status.

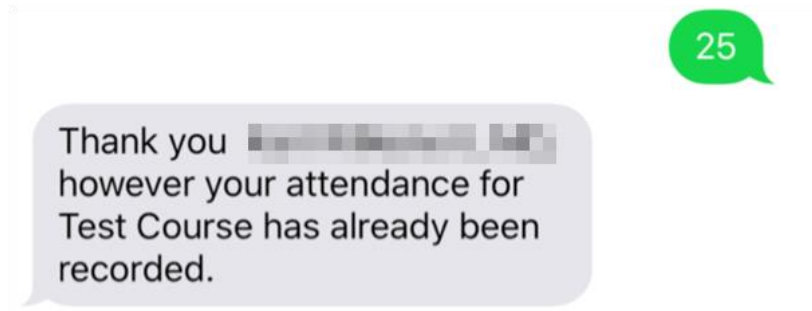
Step 1: First, users must pair their mobile phone to their account in CloudCME®. To do that, users must enter their mobile phone number in the mobile phone field of their CloudCME profile.

Step 2: To record attendance to a session, users must text the Child ID that has been provided for the session to **732-253-4415**¹. Users can only record their attendance during the session or 12 hours after the session. Users will receive a message back that verifies their attendance has been recorded.

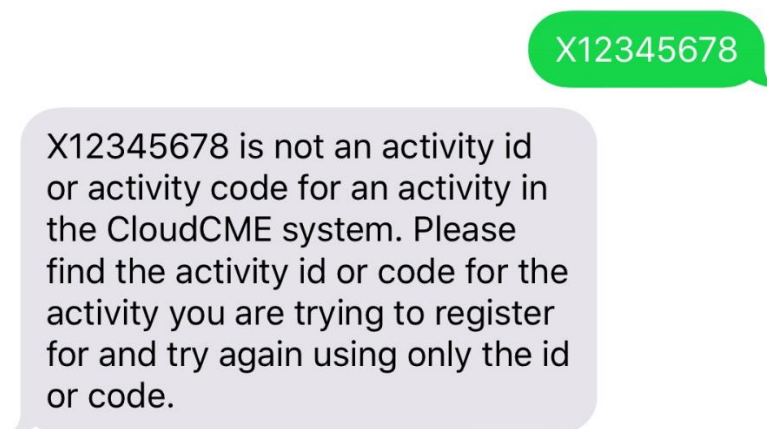


¹ You must text an SMS text message not an iMessage, if using iOS.

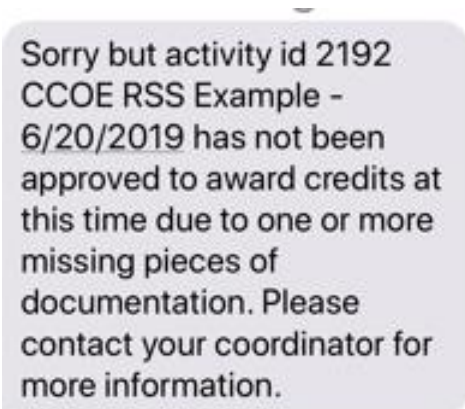
NOTE: Users can only record attendance once to a session. If users try to record their attendance an additional time, they will receive the following message.



If users attempt to use a Child ID that does not exist, they will receive the following message.



If users attempt to record attendance to a session that is not approved, they will receive the following message.




Credit Manager

While the majority of the RSS participants will text their attendance in order to be awarded the continuing education credit, there may be occasional instances where a participant is unable to text their attendance or a credit record needs to be revised or deleted. When this occurs, please contact Elizabeth Ward (elizabeth.s.ward@rutgers.edu).

CCOE will not manually add a participant who forgets to text their attendance more than three times in an academic year.




Appendix I – Uploading the Flyer



In the Topic column on the RSS Dashboard, click on the  icon to upload the flyer for the RSS Child Activity.

Topic

CCOE RSS
Example -
6/17/2019

Follow the instructions on the screen below to upload the flyer. Do **NOT** select the “Use flyer/template for Parent?” box. If this box is checked, please uncheck before uploading the flyer.

NOTE: Faculty must be assigned to a child activity before you can upload a flyer.

NOTE: The flyer must be in Word in order to upload.

Instructions: If you would like to upload a custom flyer for this event, please click the upload flyer button below. When finished, please click submit and the flyer will update.

Upload Flyer

Submit Delete Flyer

☐ Use flyer/template for Parent?

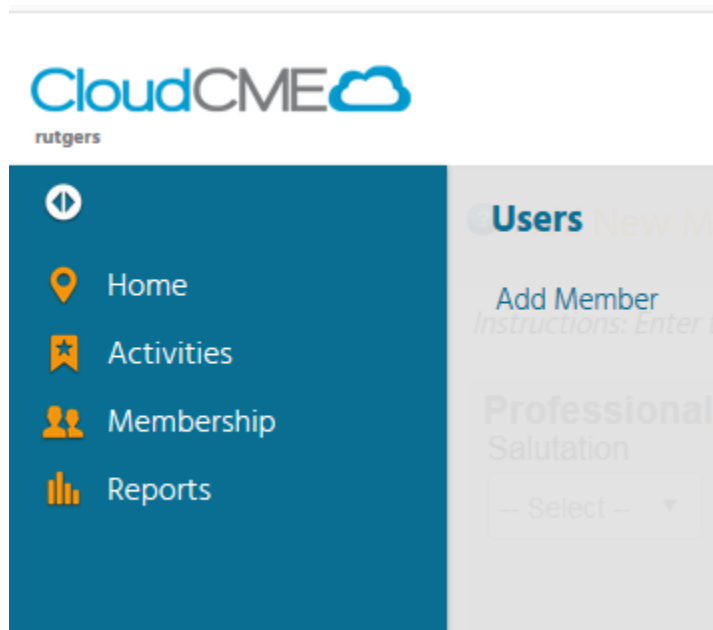
[Download Microsoft Word Version](#)

1 of 1 Automatic Zoom

SERIES TITLE
Provided by Rutgers School, Department of Department
Session Title

Appendix II - Add Member

To add a new member in the system, go to main menu and click **Membership > Add Member**.



Professional Information

Enter the new member's professional information. At minimum, enter First Name, Last Name, Degree, Profession, and Title. Disregard Induction Date and Last Training Date.

[Add New Member](#)

Instructions: Enter the new user information, including the red-starred required items and any optional items and click Save at the bottom of the page.

Professional Information							
Salutation	First Name *	M.I.	Last Name *	Suffix	Degree *	Other Fellowships	
-- Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>	-- Select --	<input type="text"/>	<input type="text"/>	
Profession *	Professional Title	Preferred First Name	Spouses Name	Induction Date	Birth Month & Day	Last Training Date	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Jan <input type="text"/>	<input type="text"/>	<input type="text"/>

Credentials

You do not need to enter any information in the Credentials section.

Credentials					
ABIM Diplomate ID	ABP Diplomate ID	ABA Diplomate ID	ABPath Diplomate ID	License Number	NPI
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
NABP ePid#	Social Work License Number	ABOHNS Diplomate ID			
<input type="text"/>	<input type="text"/>	<input type="text"/>			

State License(s)

You do not need to enter any information in the State License(s) section.

State License(s)		
Select State License Type	License Number	Expire Date
<input type="button" value="+"/> -- Select --	<input type="text"/>	<input type="text"/>

Login Information

Each user must have a unique email.

NOTE: Properly formatted email addresses can only be entered in the email fields. For example, "johnsmith" is not a valid email address. It should be formatted as 'johnsmith@domain.com.'

You must assign a temporary password in order to add a new member. Please follow this temporary password naming convention:

- UPPERCASE first initial of first name
- Last name
- 20
- !

For example, John Smith's temporary password would be "Jsmith20!".

NOTE: Check "Do Not Send New Member Email" if you do not want new members to receive an automated email from CloudCME notifying them that they have been added to CloudCME.

Login Information			
Email *	Confirm Email *	Password *	<input checked="" type="checkbox"/> Do Not Send New Member Email
<input type="text"/>	<input type="text"/>	<input type="text"/>	

Employment

You do not need to enter any information in the Employment section.

Employment	
Department	<input type="text"/>

Primary Contact Information

Enter the member's primary contact information.

Primary Contact Information <input checked="" type="checkbox"/> Display this address in the directory	
Organization <input type="text"/>	Address <input type="text"/>
Address 2 <input type="text"/>	Address 3 <input type="text"/>
City <input type="text"/>	State <input type="text" value="NJ"/> Postal <input type="text"/>
County <input type="text"/>	Country <input type="text" value="UNITED STATES"/>

Secondary/Alternate Contact Information

Enter the member's secondary contact information, if applicable.

Secondary/Alternate Contact Information <input type="checkbox"/> Display this address in the directory	
Organization <input type="text"/>	Address <input type="text"/>
Address 2 <input type="text"/>	Address 3 <input type="text"/>
City <input type="text"/>	State <input type="text"/> Postal <input type="text"/> County <input type="text"/> Country <input type="text" value="UNITED STATES"/>

Phone Numbers

Enter the member's phone information.

Phone Numbers			
Phone <input type="text"/>	Ext. <input type="text"/>	Mobile <input type="text"/>	Fax <input type="text"/>

Assistant Contact Information

It may be advantageous to enter the member's administrative assistant contact information if the member serves as faculty. The administrative contact is copied on all faculty email correspondence.

Assistant Contact Information		
Assistant's Name <input type="text"/>	Assistant's Phone <input type="text"/>	Assistant's Email <input type="text"/>

Emergency Contact

You do not need to enter any information in the Emergency Contact section.

Emergency Contact	
Emergency Contact Name <input type="text"/>	Emergency Contact Number <input type="text"/>

Comments

You do not need to enter any information in the Comments section

Comments	
Comments, allergies, other personal items of interest	

Opt-Out Options

Do not select any of three opt-out options

Opt-Out Options
<input type="checkbox"/> Directory Opt out - By checking this box, you indicate you do NOT want to be displayed in the online directories published by the Society.
<input type="checkbox"/> Email Opt out - By checking this box, you indicate you do NOT want to receive email from the Society.
<input type="checkbox"/> No Online Courses - By checking this box, you indicate you do NOT want to show online courses for this user.

Credit Eligibility

One credit type (AMA PRA Category 1 Credits™ or Non-Physician Attendance) will be automatically selected based on the profession selected in the Professional Information section. Please make sure you selected the member's correct profession.

Credit Eligibility *			
<input type="checkbox"/> AMA PRA Category 1 Credits™	<input type="checkbox"/> Non-Physician Attendance	<input type="checkbox"/> AAPA Category 1 CME	<input type="checkbox"/> ACPE Credits
<input type="checkbox"/> ANCC Contact Hours	<input type="checkbox"/> General Attendance	<input type="checkbox"/> ABIM MOC Part 2	<input type="checkbox"/> ABA MOCA 2.0 Part 2
<input type="checkbox"/> ABP MOC Part 2	<input type="checkbox"/> ABPath MOC Part 2	<input type="checkbox"/> CRSP Recertification Credits	<input type="checkbox"/> ABOHNS MOC Part 2
<input type="checkbox"/> CADC Recertification Credits	<input type="checkbox"/> LPC/LAC: Recertification Credits	<input type="checkbox"/> Social Worker: NASW Contact Hours	<input type="checkbox"/> LPC/LAC: NBCC CE Clock Hours
<input type="checkbox"/> Social Worker: NJBSWE CE Credits	<input type="checkbox"/> NJDCA-MFT Recertification Credits	<input type="checkbox"/> NJ MH Screener: TAC CE Credits	<input type="checkbox"/> Teacher/Paraprofessional Professional Development Hours
<input type="checkbox"/> Psychologist: APA CE Credits	<input type="checkbox"/> ASWB ACE Credit		

Roles

Select "Faculty" as the member's role.

Roles		
<input type="checkbox"/> Abstract Grader	<input type="checkbox"/> Abstract Manager	<input type="checkbox"/> Activity Coordinator
<input type="checkbox"/> Activity Manager	<input type="checkbox"/> Administrators	<input type="checkbox"/> Application Administrator
<input type="checkbox"/> Application Approver	<input type="checkbox"/> Application Auditor	<input type="checkbox"/> Application Reviewer
<input type="checkbox"/> Assistant Coordinator	<input type="checkbox"/> CME Activity Coordinator	<input type="checkbox"/> CME Coordinator
<input type="checkbox"/> CME Manager	<input type="checkbox"/> Content Manager	<input type="checkbox"/> Course Director
<input type="checkbox"/> Disable User Aliasing	<input type="checkbox"/> Events	<input type="checkbox"/> Faculty
<input type="checkbox"/> Faculty Manager	<input type="checkbox"/> Finance	<input type="checkbox"/> Finance Manager
<input type="checkbox"/> Forms Manager	<input type="checkbox"/> Manager	<input type="checkbox"/> Membership Manager
<input type="checkbox"/> Peer Reviewer	<input type="checkbox"/> Practice Manager	<input type="checkbox"/> Reports
<input type="checkbox"/> Retired	<input type="checkbox"/> RSS Coordinator	<input type="checkbox"/> RSS Manager

Practice Area

Select the member's areas of practice. Click on the drop-down list to select the specialty(ies).

- ☐ Addiction Medicine
 - ☐ Addiction Psychiatry
 - ☒ Adolescent Medicine
 - ☐ Allergy and Immunology
 - ☐ Ambulatory Care Pharmacy
 - ☐ Anatomic Pathology
 - ☐ Anesthesiology
 - ☐ Behavioral Health
 - ☐ Cardiac Electrophysiology
 - ☐ Cardiology Pharmacy
 - ☐ Cardiovascular Disease
-

When all information is entered, and roles are assigned, click the **Save** button at the bottom of the screen. A message will appear informing you of success, or provide guidance if a required field needs to be filled in.

