



Owners/Coordinators Training Manual for Regularly Scheduled Series (RSS)

**CloudCME® v. January 2022
RU v. March 2022**

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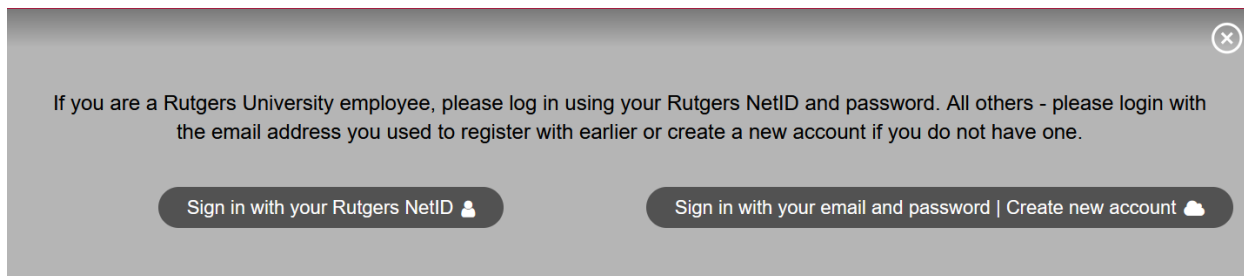
RSS Dashboard Introduction

The CloudCME® RSS Dashboard enables RSS Owners/Coordinators to manage RSS sessions, known as child activities in CloudCME®. In the RSS Dashboard, you can enter 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/>.

If you have a Rutgers NetID and a Rutgers email address, log into CloudCME® by clicking **Sign in with your Rutgers NetID**, enter your NetID and password, and click the Login button.

All others, log into CloudCME® by clicking **Sign in with your email and password**, enter your email address and password, and click the Login button.

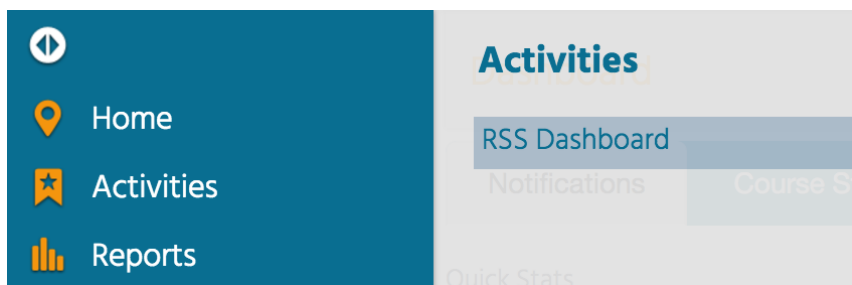


On the lower-left hand side of the screen, next to the drop-down box, click **Administration**.



NOTE: CCOE must assign permission to your account in order for you to view this screen. If you do not see **Administration** or do not have access to the RSS Dashboard (see below), please contact Elizabeth Ward (elizabeth.s.ward@rutgers.edu), or Patrick Dwyer (patrick.dwyer@rutgers.edu).

Then, from the main menu, go to **Activities > RSS Dashboard**.



The RSS Dashboard screen will display.

☐ Parents Only

Date Range:

Status:
Location:
Department:
Faculty:

Specialty:

Child Status	Details	Topic	QR	Faculty	Presentations & COI Status	Target Audience
IN REVIEW	Series Name: CCOE RSS Example FY2022 Sunday, March 13, 2022 4:00 PM - 5:00 PM Location: N/A Department: N/A Parent ID: 12423 Child ID: 12431	CCOE RSS Example FY2022 - 3/13/2022 	<input type="button" value="Single Scan QR"/>	<input type="button" value="Manage Faculty (1)"/> Elizabeth Ward, MSJ Disclosure submitted: 11/21/2021 Disclosure: Other: Test-Test (Relationship has ended) - 11/21/2021	Elizabeth Ward, MSJ AdvaMed-Code-of-Ethics-2021.pdf 	

As an RSS Owner/Coordinator, you will only see the RSS series and child activities that are assigned to you. When you first access the dashboard, you will see child activities scheduled to take place within the next 30 days. Search for an RSS child activity by typing the activity name or activity code in the search box and/or filtering by **Date Range, Status, Location, Department, Faculty** or **Specialty**. Click the **Search** button to display results. You can export the RSS Dashboard by clicking **Export XLS**.

NOTE: You can hide columns on the RSS Dashboard screen based on your needs by right clicking on the column header and selecting or deselecting a column to appear. For example, you should hide the QR column, as this is not used by Rutgers. You can also reorder columns by dragging them left or right to move them into a specific order. If you want to save which columns appear and/or the arrangement of the columns, click **Save Layout**. You can reset the layout by clicking **Reset**.

NOTE: You will see the acronym **COI** in the RSS Dashboard and in this training manual. **COI** stands for **Conflict of Interest**. If a faculty member disclosed a financial relationship on their disclosure form, this may result in an actual or potential COI if the faculty member will present content related to the business lines or products of the company with whom they have a relationship. As an accredited provider, Rutgers is required to take steps to mitigate these financial relationships to prevent the insertion of bias towards commercial products or services. In CloudCME®, this is referred to as the COI Mitigation Process. A faculty member's financial relationships are mitigated through peer review, which is described later in this manual.

RSS Dashboard Columns

The RSS Dashboard data table contains several columns to assist the RSS Owner/Coordinator in managing the RSS activity planning process.

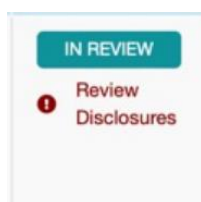
The following columns are included in the RSS Dashboard:

1. **Child Status** - As the RSS child activity goes through the approval process, this column will continuously update the status to **Incomplete**, **Pending**, **Approved**, **Rejected** or **In Review**.



Status Definitions

- **Incomplete** - This status displays if faculty do not have a disclosure form on file, or the disclosure form on file expired. You will see Incomplete by default until faculty are assigned and the disclosure form is completed.
- **Pending** – This status displays if faculty have a disclosure form on file and (1) faculty have no financial relationships to disclose, OR (2) faculty have relationships to disclose, their content was uploaded for review, and the peer reviewer completed the review and approved the content, OR (3) CCOE determined that the declared financial relationships are not relevant to the child activity. When a child activity is Pending status, the child activity should be ready for CCOE's final review.
- **In Review** - This status displays if faculty declared at least one financial relationship. You must upload the faculty member's content for review. The child activity will stay In Review until the peer review is complete and the peer reviewer has approved the content.
- **Approved** - This status displays once CCOE approves the child activity.
- **Rejected** - This status displays if faculty completed a disclosure form and declared a financial relationship that cannot be mitigated, e.g., employee, owner, executive.



NOTE: A **Review Disclosures** indicator will display in the **Child Status** column if a user has submitted a new disclosure form prior to the activity starting. There may be a new potential COI that needs to be reviewed. Once the COI status has been addressed, the RSS status icon will update to the proper status and the indicator will be cleared.

2. **Details** - This column will display the Series Name, the date and time of the child activity, Location, Department, Parent ID, and Child ID.

Details

Series Name: CCOE RSS Example FY2022

Sunday, March 13, 2022
4:00 PM - 5:00 PM

Location: N/A

Department: N/A

Parent ID: 12423


Child ID: 12431

NOTE: When the RSS Dashboard is exported to Excel, all of the information listed in the Details column will be separated out into unique columns.

3. **Topic** - This column displays the name of the RSS child activity as well as the option to upload a flyer, view recurrence settings, add a new activity, and delete the activity.

Topic


[CCOE RSS Example FY2022 - 3/13/2022](#)



   

4. **QR** - Rutgers does not use the Single Scan QR to record attendance. This is a column that can be hidden.

5. **Faculty** - This column displays faculty assigned to the RSS child activity. The disclosure status will display beneath each faculty name along with their disclosure form submission date. If more than three faculty members are assigned to the child activity, there will be a **View All** link that when clicked, will expand to show all assigned faculty, or roll up the listing view.

Faculty

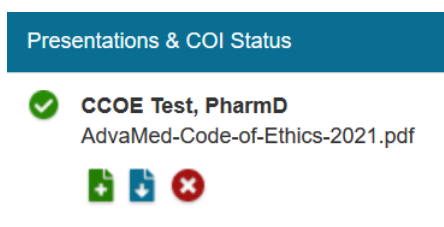
 Manage Faculty (1)

[CCOE Test, PharmD](#)  

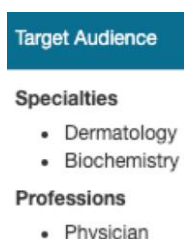
Disclosure submitted: 3/4/2022

Disclosure: Nothing to disclose - 03/04/2022

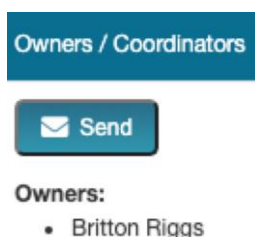
- 6. Presentation & COI Status** - This column displays a faculty member's COI status, as well as icons to **Upload**, **Download** and **Remove** a faculty presentation. To upload a presentation, click the **Upload** icon, complete the Attestation, and select the file that will be uploaded. Once a file has been uploaded, the download and delete icons will display. You should download the file once it has been uploaded to ensure that the correct file was uploaded and can be viewed.



- 7. Target Audience** - This column displays the **Specialties** and **Professions** that were selected during the series (parent activity) setup. These can be revised for a specific session on the **RSS Activity Editor** screen, which will be addressed later in this manual.





- 8. Owners/Coordinators** - This column displays the names of the series' Owners/Coordinators. This is who has access to the series in the RSS Dashboard.





RSS Icons

The columns in the RSS Dashboard contain several icons:




The following icons (1-4) can be found in the **Topic** column:


1.  **Pencil** - This icon opens the **RSS Activity Editor**. Here, you can edit the child activity information.
2.  **RSS Flyer** – To upload the flyer created for each session, click the flyer icon. Although CloudCME® generates an RSS flyer, Rutgers WILL NOT USE the system-generated flyer. You must update the custom flyer for each session. Please refer to the Resources tab in the CloudCME® portal for a link to the flyer template.


NOTE: Please refer to [Appendix I – Uploading the Flyer](#).


3.  **Calendar** - Click this icon to view and edit scheduled RSS child activities or add RSS child activities.
4.  **Trash** - Click this icon to deactivate/delete an RSS child activity. A pop-up window will display to confirm deletion.

The following icons (1-8) can be found in the **Presentations & COI Status** column:


1.  **Incomplete** – This icon will display if a faculty member does not have a current disclosure form on file, or if the faculty declared a financial relationship, the relationship needs to be mitigated.
2.  **Pending** - This icon will display if a faculty member declared a financial relationship, the content has been uploaded, and CCOE reviewed the faculty member's disclosure information and enabled the peer review process. The content is with your peer reviewer(s) for review.
3.  **Disclosure Updated** - This icon will display if a faculty member submitted a new disclosure form prior to the activity starting. There may be a new COI that needs to be reviewed. Once the COI status has been addressed, this icon will update.

4.  **Approved** - This icon will display if a faculty member completed a disclosure form and no financial relationships were declared or, if relationships were declared, the COI mitigation process has been satisfactorily completed.


5.  **Rejected** - This icon will display if a faculty member completed a disclosure form and declared a relationship that cannot be mitigated because the faculty member is an employee or an owner of an ineligible company¹. The child activity status is then updated to **Rejected**. You will need to remove this faculty member, select a **new** faculty member, and begin the process again.


6.  **Upload** - Upload a presentation file for the faculty member. Once a presentation has been uploaded, the download and delete icons will display.

7.  **Download** – Click this icon to download a faculty member's presentation file.

8.  **Delete** – Click this icon to delete a faculty member's presentation file.

The following icons (1,2) can be found in the **Faculty** column:

1.  **Email**: Click this icon to draft and send an email to the selected faculty member. The email will NOT indicate that it is coming from, so we discourage you from using this feature.

2.  **Remove**: Click this icon to remove a faculty member from the RSS child activity.

Editing an RSS Child Activity

The RSS Dashboard provides a minimized view to manage RSS activities. You will see all activities that you have been assigned as Owner/Coordinator.

To edit an RSS child activity, click the **Pencil** icon or the child activity title in the **Topic** column.



¹ An ineligible company is a company whose primary business is producing, marketing, selling, re-selling, or distributing healthcare products used by or on patients.

The **RSS Activity Editor** screen will display. Here, you can edit and/or add additional information and upload supporting documentation for the child activity. Supporting documentation does not include the child activity content or flyer.

RSS Activity Editor

Instructions: This screen displays RSS child details and allows for modification. 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. Select specialties, subspecialties, areas of interest, and professions as they apply. Upload any necessary supporting documentation. When finished, click Save & Close.

Name:

Location: **Date/Time:** to

Allow Texting Minutes Prior: **Allow Texting Minutes After:**

Objectives

If this activity has multiple accrediting bodies, select a set of objectives to edit them.

☒ Physician

Supporting Documentation

Instructions: If you need to upload supporting documents (.docx, .txt, .pdf), add them here. Note: This is not for uploading faculty powerpoint or presentations.

Specialties

Select relevant Specialties in the Specialties drop-down in order to display the corresponding Subspecialties and Areas of Interest drop-downs (if applicable).

Specialties:

Professions

Professions:

Uploaded Files

No files currently uploaded to this activity.

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

NOTE: You are not required to edit the objectives, specialties or professions for the child activity. If you use session specific objectives, or would like additional specialties or professions to appear for a particular child activity on the Attendee Portal, you can edit that information in the RSS Activity Editor Screen.

In the **Supporting Documentation** section, please upload the signed Speaker Agreement(s) for the session. For tumor boards, case conferences, etc., where the same speaker presents multiple times during the year, please upload the signed Speaker Agreement that covers the entire series for the speaker’s first session.

NOTE: The child activity title will appear on users’ transcripts as you have entered it into the Name field. Therefore, the activity name should reflect the name of lecture, with the exception of tumor boards, case conferences, etc., where the child activity does not have a unique name.

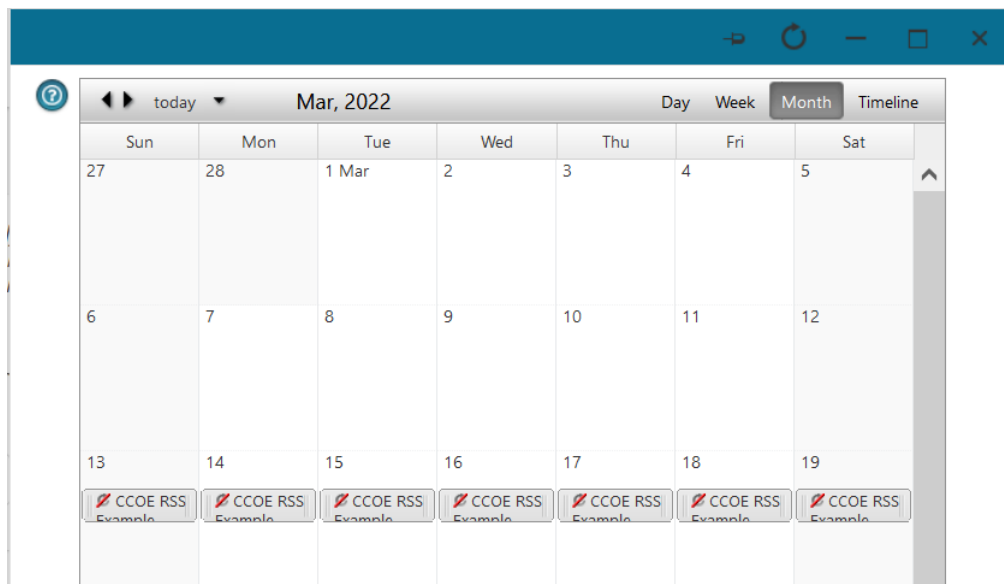
When all information has been entered, click the **Save & Close** button.

Adding an RSS Child Activity

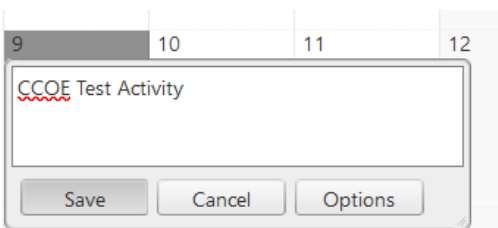
RSS child activities were set up based on the schedule information provided in your RSS application. If you need to add a new child activity, you can click on any calendar icon in the Topic column.



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



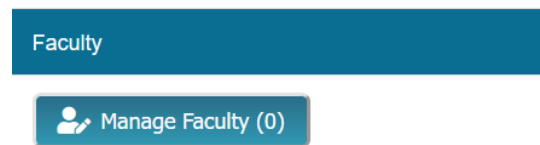
Add the title of the child activity and click **Save**.



After closing the calendar window, the new child activity will now appear in the RSS Dashboard. You can edit the child activity details in the RSS Activity Editor by clicking on the child activity title or the Pencil icon in the Topic column.

Adding Faculty to an RSS Child Activity

Begin to add your identified faculty (speakers) to your child activity in the Faculty column. Clicking the **Manage Faculty** button will display a pop-up screen that allows you to view, add or remove faculty, request disclosure forms, and export faculty member information.



To add a faculty member to the child activity, type and select the member's name in the drop-down box. Faculty must have a CloudCME® profile in order to add them to a child activity. Click the **Add Faculty** button. The new faculty member will be added to the activity and the member's information will display in the Manage Faculty table.

Manage Faculty for CCOE RSS Example FY2022 - 3/15/2022 (12927)

☒ Request Disclosure? ☐ Request Presentation?

	Full Name	Email	Disclosure Date	Disclosure	
<input type="checkbox"/>	CCOE Test, PharmD	ccoe@ca.rutgers.edu	3/4/2022	Nothing to disclose - 03/04/2022	<input type="button" value="-"/>

The **Request Disclosure** box will be checked by default. As long as that box remains checked before clicking the **Add Faculty** button, once a faculty member is added to the activity, the faculty member will receive an email with instructions to complete or update their disclosure form. If you are using the same faculty members for all or most sessions and you know that there is already a current disclosure form on file (completed 11/20/2021 or later and completed within the last 365 days), you can uncheck the **Request Disclosure** box before adding the faculty member. This will prevent them from receiving an excessive amount of emails from CloudCME® regarding their disclosure form.

NOTE: If the **Request Presentation** box is checked, faculty **WILL NOT** receive an automated email to upload their content. Therefore, we recommend that this box remains unchecked.

Once you close the Manage Faculty screen, you will see that the faculty member has been added to the child activity.

Faculty

Manage Faculty (1)

[Elizabeth Ward, MSJ](#)  

Disclosure submitted: 11/21/2021

Disclosure: Other: Test-Test (Relationship has ended) - 11/21/2021

Click the faculty member's name to assign tasks related to the disclosure form, presentation files and other optional information.

Assigned Forms Photo & Profile Uploaded Files Past Courses


☒ Disclosure of Financial Relationships

☒ Upload Presentation Files

Honorarium (optional):

HotelNights (optional):

Comments (optional):

 Update

NOTE: Assigning forms will not generate an email to the faculty. Instead, faculty will see these as assigned tasks in their Faculty Portal. Therefore, it is our recommendation that you only assign the Upload Presentation Files and direct your faculty to the My Tasks area in the Faculty Portal if faculty cannot send you their content via email or file transfer/file share service.

Sign Out Live Courses Grand Rounds/RSS Online Courses Resources About Contact Us Help Faculty 1 My CE

My Tasks


Welcome to the Rutgers Biomedical and Health Sciences Interprofessional Continuing Education Faculty Portal.


Please complete the tasks assigned below. A red box indicates that the task is incomplete, and a green check mark indicates that the task has been completed.


Global Tasks Activity Tasks **1** Upcoming Presentations

Upcoming Presentations

CCOE RSS Example FY2022
- 3/15/2022 - 03/15/2022 4:00 PM

 CCOE RSS Example FY2022 - 3/15/2022

 03/15/2022 4:00 PM

 Upload Presentation

NOTE: If the faculty member does not have a profile in CloudCME® and the faculty member has a Rutgers NetID along with a Rutgers email address that they regularly access, please provide them with these instructions: <https://rutgers.cloud-cme.com/assets/rutgers/PDF/Create%20a%20CloudCME%20Account%20using%20SSO.pdf>.

NOTE: If the faculty member does not have a profile in CloudCME® and does not have a Rutgers NetID or a Rutgers email address that they regularly access, you will need to add the faculty member to the system through the Membership Manager. See [Appendix II - Add Member](#).

Faculty Disclosure Scenarios

Scenario 1: Faculty member does not have a current disclosure form on file

If the faculty member does not have a current disclosure form on file in CloudCME®, the child status will remain **INCOMPLETE** until the disclosure form has been completed.

INCOMPLETE	Series Name: CCOE RSS Example FY2022 Friday, March 11, 2022 4:00 PM - 5:00 PM Location: N/A Department: N/A Parent ID: 12423 Child ID: 12981	CCOE RSS Example FY2022 - 3/11/2022 	<div>Manage Faculty (1)</div> <div>Elizabeth Physician, BSN</div> <div> Disclosure submitted: N/A Disclosure: NO DISCLOSURE ON FILE </div>	<div>Elizabeth Physician, BSN</div> <div>Upload Presentation</div>
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Scenario 2: Faculty member HAS NO financial relationships to disclose









If the faculty member declares that they have no financial relationships on their disclosure form, the child status will update to **PENDING** and the RSS child activity is ready to be reviewed by the CCOE as long as the flyer/announcement is also uploaded.


NOTE: If a faculty member has no financial relationships to disclose, you still have the option to upload the faculty member's presentation in the Presentations & COI Status column. This is **OPTIONAL** and for these faculty members, their content will not be reviewed by the peer reviewer. This is just a place for you to archive their content if you request faculty to send you their presentation, regardless of their disclosure status. You will only be required to upload content if a faculty member disclosed a financial relationship.

Child Status	Details	Topic	Faculty	Presentations & COI Status
PENDING	Series Name: CCOE RSS Example FY2022 Thursday, March 10, 2022 4:00 PM - 5:00 PM Location: N/A Department: N/A Parent ID: 12423 Child ID: 12980	CCOE RSS Example FY2022 - 3/10/2022 	<div>Manage Faculty (1)</div> <div>CCOE Test, PharmD</div> <div> Disclosure submitted: 3/4/2022 Disclosure: Nothing to disclose - 03/04/2022 </div>	<div>CCOE Test, PharmD</div> <div>Upload Presentation</div>



Scenario 3: Faculty member HAS financial relationships to disclose

If the faculty member declares that they have at least one financial relationship on their disclosure form, the child status will update to **IN REVIEW**.

IN REVIEW	Series Name: CCOE RSS Example FY2022 CCOE RSS Example FY2022 - 3/12/2022 Saturday, March 12, 2022 4:00 PM - 5:00 PM Location: N/A Department: N/A Parent ID: 12423 Child ID: 12982	   	Manage Faculty (1) Elizabeth Ward, MSJ   Disclosure submitted: 3/6/2022 Disclosure: Test-Test-Relationship_has_ended Consultant-Abbott Laboratories-Relationship_has_not_ended - 03/06/2022	 Elizabeth Ward, MSJ Upload Presentation 
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When a faculty member has a financial relationship, you **must** obtain the faculty member's content and upload it in the **Presentations & COI Status** column. To upload the content, click the upload icon (). 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.

Presentations & COI Status


 **Elizabeth Ward, MSJ**
Upload Presentation


Once content has been uploaded, the download and delete icons will display.





Presentations & COI Status

 **Elizabeth Ward, MSJ**
FY22 RSS Faculty Disclosure Information.pdf
  

NOTE: Uploading content no longer triggers the peer review process to begin. Due to changes in accreditation requirements, CCOE must review the faculty's disclosure information and enable the peer review process.

Within one business day of content being uploaded, CCOE will review the faculty's disclosure information to begin the peer review process. You will know the content is with your peer reviewer(s) for review when the pending icon () appears next to the faculty's name in the Presentation & COI Status column.

Presentations & COI Status

 **Elizabeth Ward, MSJ**
FY22 RSS Faculty Disclosure Information.pdf
  

All assigned peer reviewers will receive an email from Rutgers University <rutgers@rutgers.cloud-cme.com> with a link to access the documents needed to complete the review.



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

Thank you Elizabeth Physician, BSN for participating as a Peer Reviewer. We need you to review a potential conflict of interest pertaining to activity CCOE RSS Example FY2022 - 3/12/2022. Please click the link to review the faculty, their presentation and their disclosure and complete your peer review. [Click here to go to My Tasks](#)

After clicking the link in the email and logging in to CloudCME®, the peer reviewer will be brought to the **My Tasks** area of their Faculty portal. The peer reviewer must select **Peer Reviewer Tasks** and then click the review button to begin the peer review.

NOTE: Peer reviewers can access the **My Tasks** area at any time by logging in to CloudCME® and clicking the **Faculty** button in the top menu bar. Provided that CCOE has enabled the peer review process, if faculty cannot locate the email notification in their inbox, they can come directly to the **My Tasks** area to view their pending tasks.

When faculty click **Review**, they will be brought to the **COI Mitigation Form** where they will view the faculty's disclosure information and download the content for review. Once they respond to the questions on the **COI Mitigation Form**, they must electronically sign and date the form and click **Submit**. For an example of the COI Mitigation Form, please refer to [Appendix III – COI Mitigation Form](#).

Once the peer review is complete and the reviewer approved the content, the session will update to **PENDING** and the pending icon (🔄) in the Presentations & COI column will change to approved (✅). The faculty member will also receive an email that their content was approved.

Child Status	Details	Topic	Faculty	Presentations & COI Status
PENDING	Series Name: CCOE RSS Example FY2022 Monday, March 14, 2022 4:00 PM - 5:00 PM Location: N/A Department: N/A Parent ID: 12423 Child ID: 12984	CCOE RSS Example FY2022 - 3/14/2022    	Manage Faculty (1) Elizabeth Ward, MSJ   Disclosure submitted: 3/6/2022 Disclosure: Other: Test-Test (Relationship has ended)(Consultant-Abbott Laboratories - 03/06/2022)	 Elizabeth Ward, MSJ FY22 RSS Faculty Disclosure Information.pdf   

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) or Patrick Dwyer (patrick.dwyer@rutgers.edu).

Approving RSS Child Activities

In CloudCME®, RSS Coordinators/Owners cannot approve RSS child activities. CCOE staff must approve the RSS child activities prior to the start time. RSS child activities will not be awarded credit unless CCOE approves them. CCOE cannot approve an RSS child activity without a disclosure form on file and an uploaded flyer/announcement that contains the appropriate disclosure information for planners and faculty. Furthermore, if the faculty member has a relevant financial relationship, CCOE cannot approve the child activity until the presentation has been uploaded and the Peer Reviewer completed the COI Mitigation Form.

An RSS child activity must be in PENDING status with the flyer/announcement uploaded no later than three business days prior to the session date. This means that speaker disclosure forms are on file, and that either there were no relevant financial relationships, or that the financial relationships were mitigated through peer review.


CCOE will review sessions in the RSS Dashboard Mondays-Fridays, 8:00am-4:00pm. Sessions will not be reviewed once the sessions begins. If a session is in **PENDING** status less than three days prior to a session, there is no guarantee of review.

When CCOE approves the session, the status changes to **APPROVED**.

Disclosure Report

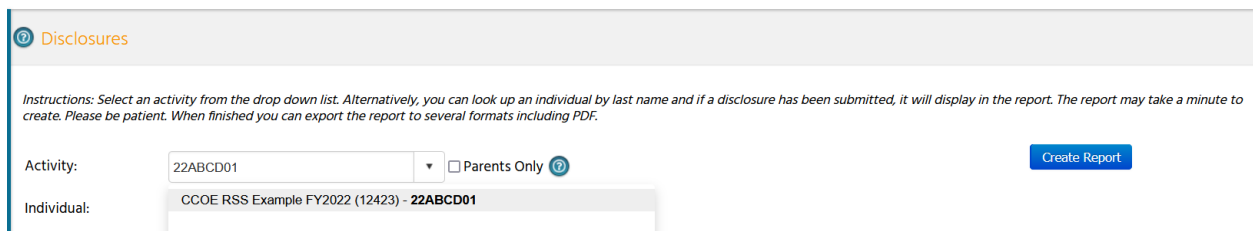
The Faculty Disclosure Report allows you to search for completed disclosure forms by activity or by individual. Searching by Activity will result in the most recent faculty completed disclosure forms displaying. If searching by Individual, you can choose to select a faculty member's disclosure form by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

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



A screenshot of a web interface showing a blue header bar with the word "Faculty" in white. Below the header is a light gray box containing the word "Disclosures" in a dark gray font.

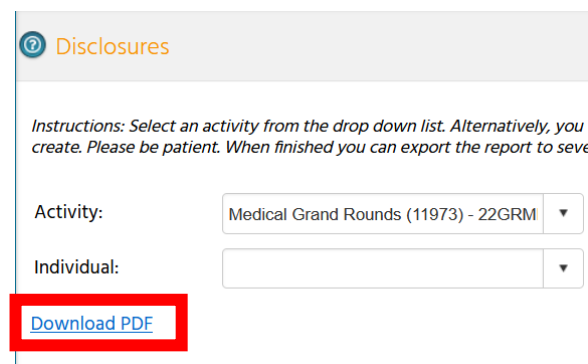
Search for an activity name in the **Activity** field and select the activity name from the drop-down list to find disclosure forms associated by activity. Once you select the activity, click **Create Report**.



A screenshot of a web form titled "Disclosures" with a question mark icon. Below the title is a line of instructions: "Instructions: Select an activity from the drop down list. Alternatively, 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 form has two main input fields: "Activity:" and "Individual:". The "Activity:" field has a dropdown menu with "22ABCD01" selected and a "Parents Only" checkbox with a question mark icon. The "Individual:" field has a dropdown menu with "CCOE RSS Example FY2022 (12423) - 22ABCD01" selected. A blue "Create Report" button is located to the right of the "Activity:" field.

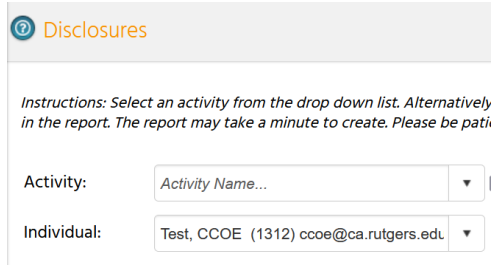
NOTE: Searching by an Activity will retrieve all the activity faculty members' disclosure forms. For RSS, searching by activity is not very beneficial unless you want to view all of the disclosure forms for an RSS planning committee. For this reason, we suggest using the Disclosure Report to search for individual disclosure forms.

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.



A screenshot of the same "Disclosures" form as above, but with different values. The "Activity:" dropdown now shows "Medical Grand Rounds (11973) - 22GRM". The "Individual:" dropdown is empty. A red rectangular box highlights the "Download PDF" link, which is a blue text link located below the "Individual:" field.

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



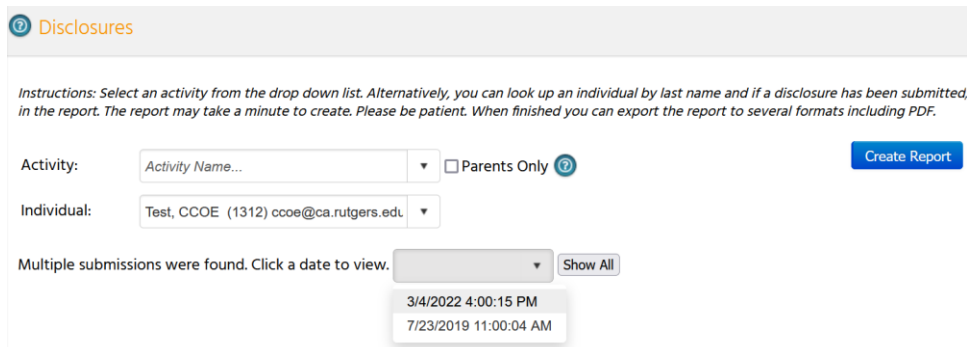
Disclosures

Instructions: Select an activity from the drop down list. Alternatively in the report. The report may take a minute to create. Please be pati

Activity:

Individual:

If the faculty member completed multiple disclosure forms 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 form you would like to access.



Disclosures

Instructions: Select an activity from the drop down list. Alternatively, you can look up an individual by last name and if a disclosure has been submitted, 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: ☐ Parents Only [Create Report](#)

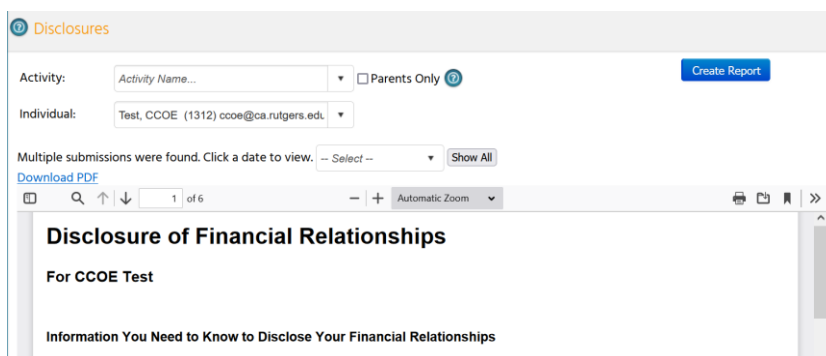
Individual:

Multiple submissions were found. Click a date to view.

- 3/4/2022 4:00:15 PM
- 7/23/2019 11:00:04 AM

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

You can click **Show All** and the system will render every completed disclosure form for that faculty member. A blue hyperlink is available for PDF format (**Download PDF**). You can also download the file or print the file.



Disclosures

Activity: ☐ Parents Only [Create Report](#)

Individual:

Multiple submissions were found. Click a date to view. [Show All](#)

[Download PDF](#)

1 of 6 Automatic Zoom

Disclosure of Financial Relationships

For CCOE Test

Information You Need to Know to Disclose Your Financial Relationships

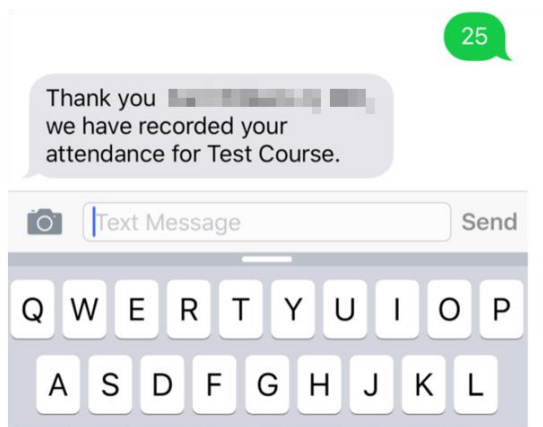
Attendance Recording - SMS Texting

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 during the RSS child activity. The Child ID can be found in the Details 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 child activity or 12 hours after the child activity.
5. The child activity must be in APPROVED status.

Step 1: First, users must pair their mobile phone to their CloudCME® profile. 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 child activity, users must text the Child ID that has been provided for the session to 888-816-4893². Users can only record their attendance during the child activity or 12 hours after the child activity. Users will receive a message back that verifies their attendance has been recorded.

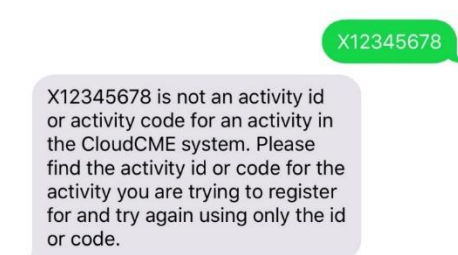


² You must text an SMS text message not an iMessage, if using iOS.

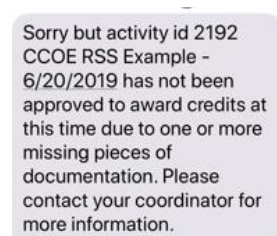
NOTE: Users can only record attendance once to a child activity. If users try to record their attendance an additional time, they will receive the following message.



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 child activity that is not approved, they will receive the following message.



Credit Manager


All credit must be claimed directly by the learner within the specified time frame by texting their attendance from their mobile phone or using the Claim Credit Form available in the Rutgers CloudCME® Attendee Portal or mobile app.





RSS owners/coordinators have access to three reports to verify if learners claimed credit. See [Appendix IV - Credit Reports for RSS Owners/Coordinators](#).

If an individual does not claim credit within the time frame, CCOE will add credit for individuals for up to three sessions in the academic year (July-June). Requests to add credit must be sent by email from the RSS Coordinator to Patrick Dwyer (patrick.dwyer@rutgers.edu) or Elizabeth Ward (elizabeth.s.ward@rutgers.edu).

CCOE will not manually add credit for 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 FY2022 - 3/13/2022
   

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.

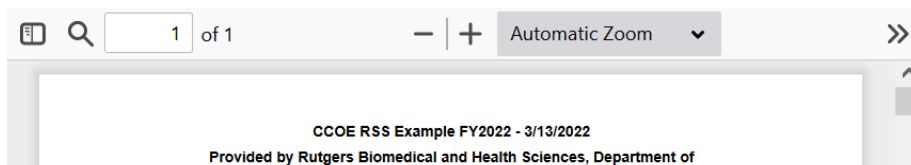
Upload Flyer

 Save

☐ Use flyer/template for Parent?

No objectives have been specified for this event and will consequently not be displayed on the flyer.

[Download Microsoft Word Version](#)



You will know that you successfully uploaded the flyer once you see it on the screen.



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

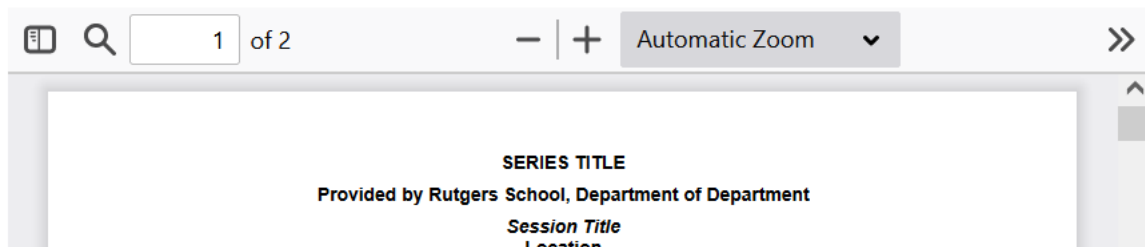
Save

Delete Flyer

☐ Use flyer/template for Parent?

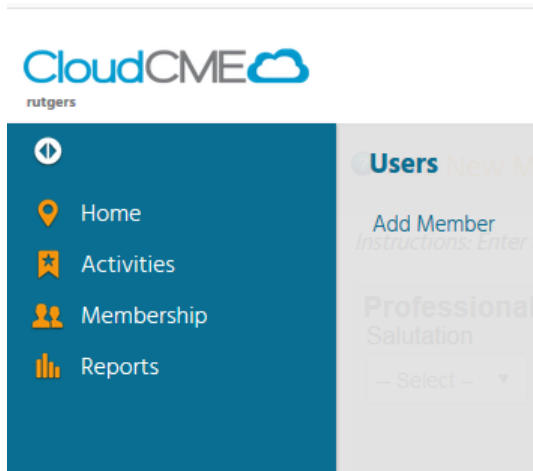
No objectives have been specified for this event and will consequently not be displayed on the flyer.

[Download Microsoft Word Version](#)



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.

[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="button" value="v"/>	<input type="text"/>	<input type="text"/> <input type="button" value="📅"/> <input type="button" value="X"/>

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"/> <input type="button" value="v"/>
County <input type="text"/>	Country <input type="text" value="UNITED STATES"/> <input type="button" value="v"/>
	Postal <input type="text" value="____-____"/>

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"/> <input type="button" value="v"/>
	Postal <input type="text" value="____-____"/>
	Country <input type="text" value="UNITED STATES"/> <input type="button" value="v"/>

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" value="() ____-____"/>

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

☐ Directory Opt out - By checking this box, you indicate you do NOT want to be displayed in the online directories published by the Society.

☐ Email Opt out - By checking this box, you indicate you do NOT want to receive email from the Society.

☐ No Online Courses - By checking this box, you indicate you do NOT want to show online courses for this user.

Roles

Select “Faculty” as the member's role.

Roles

☐ Abstract Grader

☐ Abstract Manager

☐ Activity Coordinator

☐ Activity Manager

☐ Administrators

☐ Application Administrator

☐ Application Approver

☐ Application Auditor

☐ Application Reviewer

☐ Assistant Coordinator

☐ CME Activity Coordinator

☐ CME Coordinator

☐ CME Manager

☐ Content Manager

☐ Course Director

☐ Disable User Aliasing

☐ Events

☐ Faculty

☐ Faculty Manager

☐ Finance

☐ Finance Manager

☐ Forms Manager

☐ Manager

☐ Membership Manager

☐ Peer Reviewer

☐ Practice Manager

☐ Reports

☐ Retired

☐ RSS Coordinator

☐ RSS Manager

Practice Area

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

☐ Check All

☐ Addiction Medicine

☐ Addiction Psychiatry

☐ Adolescent Medicine

☐ Allergy and Immunology

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 completed.

Save

Appendix III – COI Mitigation Form

COI Mitigation Form

Faculty: Elizabeth Ward, MSJ

Activity Name: CCOE RSS Example FY2022 - 3/12/2022

Activity Date(s): 03/12/2022

Activity ID: 12982

Presentation Name: CCOE RSS Example FY2022 - 3/12/2022

Disclosure: Other: Test-Test (Relationship has ended)|Consultant-Abbott Laboratories - 03/06/2022 ([View PDF](#))

[Download: FY22 RSS Faculty Disclosure Information.pdf](#)

Owner:

Name: Elizabeth Physicia **Email:** ndlizzie@gmail.co

[▶ Definition of Ineligible Companies \(click to view\):](#)

Review for Faculty Member

Elizabeth Ward, MSJ, has been identified as Faculty for this activity, CCOE RSS Example FY2022 - 3/12/2022, and has disclosed a financial relationship. Please complete the following related to this individual's role as Faculty for this activity:

Part II: All presentations should be reviewed for evidence-based and unbiased content by a peer reviewer with no conflicts of interest. If this speaker's presentation is available, please review the presentation and record the following findings:

Are recommendations for patient care based on current science, evidence, and clinical reasoning, while giving a fair and balanced view of diagnostic and therapeutic options? *

☐ Yes ☐ No

Does all scientific research referred to, reported, or used in this material in support or justification of a patient care recommendation conform to the generally accepted standards of experimental design, data collection, analysis, and interpretation? *

☐ Yes ☐ No

Are new and evolving topics for which there is a lower (or absent) evidence base, clearly identified as such within the material? *

☐ Yes ☐ No ☐ N/A

Does the material avoid advocating for, or promoting, practices that are not, or not yet adequately based on current science, evidence, and clinical reasoning? *

☐ Yes ☐ No

Does the material exclude any advocacy for, or promotion of, unscientific approaches to diagnosis or therapy, or recommendations, treatment, or manners of practicing healthcare that are determined to have risks or dangers that outweigh the benefits or are known to be ineffective in the treatment of patients? *

☐ Yes ☐ No

When discussing therapeutic alternatives, have the faculty/authors provided appropriate risk information as well as information relative to efficacy? *

☐ Yes ☐ No

Is the material free of commercial bias? *

☐ Yes ☐ No

Is the material free of any promotion of products or services that may serve the professional or financial interests of the faculty/author(s)? *

☐ Yes ☐ No

Are limitations of data (e.g., ongoing research, interim analysis, preliminary data, unsupported opinion) disclosed in the material? *

☐ Yes ☐ No ☐ N/A

If there is discussion of off-label/investigational uses, has this been disclosed in the material? *

☐ Yes ☐ No ☐ N/A

Have the appropriate and adequate references been provided for the data presented? *

☐ Yes ☐ No

Does any portion of the material need to be deleted (e.g., commercial source/slide deck) or modified (e.g., trade names)? *

☐ Yes ☐ No

Are there any studies, data, or best evidence missing in the material? *

☐ Yes ☐ No

Please leave any comments/revision/action needed below for the planner/faculty member. They will receive this feedback via email.

Please leave any internal comments below (these will be available to the CE Team on the Mitigation Manager Screen):

Signature: *

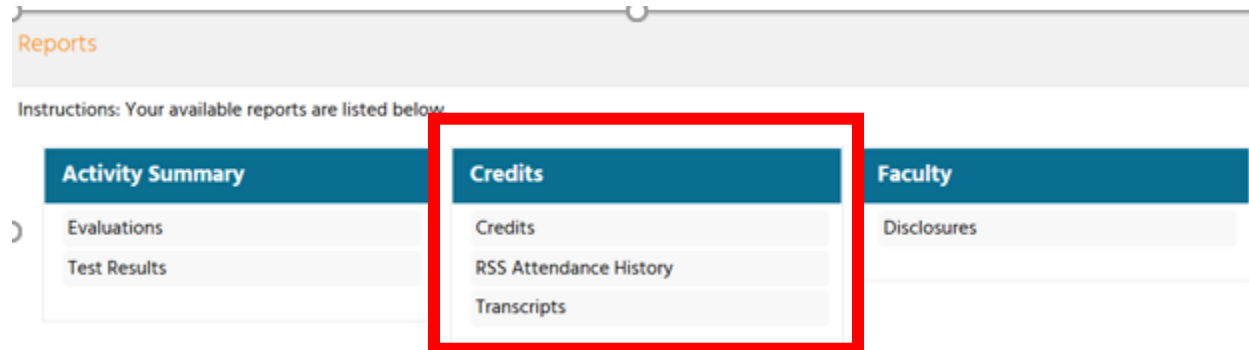
Date *

 Submit

Appendix IV – Credit Reports for RSS Owners/Coordinators

Individuals assigned as owners or coordinators of an RSS in CloudCME® have access to the following three reports related to the issuance of continuing education credit:

- **Credits**
- **RSS Attendance History**
- **Transcripts**



Credits

This screen displays the continuing education credits awarded to users for a specific activity over a specified date range.

This report allows you to search for credit by activity name and date range. Additional filters in the left column are provided to narrow the search results.

A screenshot of the 'Credits' report interface. At the top, there's a header with a question mark icon and the word 'Credits'. Below it, instructions state: 'Instructions: The Credits report displays the continuing education credits awarded to users for an activity over a specified date range. Select an activity, date range, or user. Select additional filters as needed. Then click Run Report.' The interface is divided into two main sections. On the left, there's a sidebar with filters: 'Run Report' and 'Reset Search' buttons at the top. Below them is the 'Activity' section, which includes a dropdown for 'Activity Name...', a checkbox for 'Parents Only', and a 'Date Range' section with two date pickers (showing 2/4/2022 and 3/6/2022). Below the date range are several other filter sections: 'User' (a dropdown), 'Activity Type' (a dropdown with '-- Select --'), 'Degree' (a dropdown with '-- Select --'), and 'Profession' (a dropdown with '-- Select --'). The right section contains a search bar labeled 'EventName' with a dropdown arrow. Below it are buttons for 'Export XLS', 'Refresh', 'Save Layout', and 'Reset'. A table with columns 'Activity ID', 'Start Date', 'End Date', 'Start Time', 'End Time', and 'ID' is shown. The table is currently empty, with a message 'No records to display' above it.

If you would like to view the continuing education credits for a specific activity, enter the activity name or activity code in the search box, select the activity from the activity drop-down and enter a date range. Then, click the Run Report button.

Credits

Instructions: The **Credits** report displays the continuing e. Select additional filters as needed. Then click **Run Report**.

Run Report **Reset Search**

Activity

CCOE RSS Example FY2022 (124) ☐ Parents Only

Date Range

1/1/2022 to 3/6/2022

User

RSS Attendance History

The RSS Attendance History report provides data on RSS attendance with attendance numbers. Enter the name of the RSS in the activity search field. You can further narrow the search results by providing a First Credit Date and a Last Credit Date. Enter the search criteria and click the **Run Report** button.

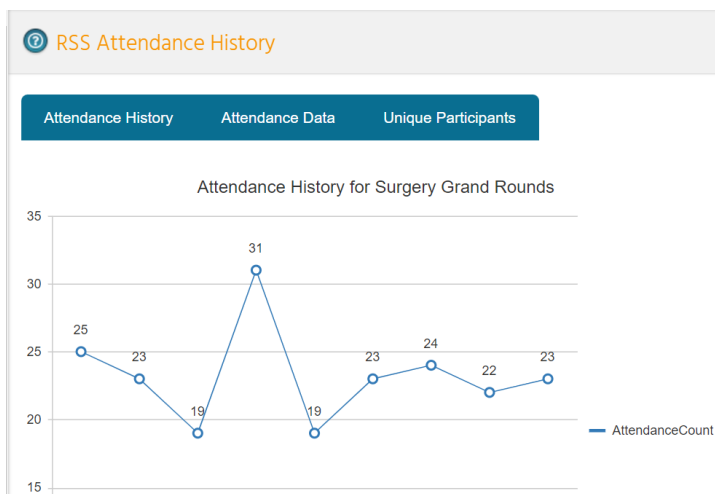
RSS Attendance History

Instructions: Use this report to audit the attendance dates of a specific RSS over time. After running the report the Unique Participants tab will display the unique attendees to your RSS over the time period.


22GRMN01 ☒ Parents Only First credit date: 1/1/2022 Last Credit Date: 12/31/2022 **Run Report**

Surgery Grand Rounds (12228) - 22GRMN01


The plot chart will display with actual attendance numbers.



Select the **Attendance Data** tab to view the child activity date, the attendance total, the title of the child activity and the child ID number. This data can be exported to an XLS file by clicking the **Export XLS** button

 RSS Attendance History

Attendance History **Attendance Data** Unique Participants


 Export XLS

Date		Attended	Title	ID
1/5/2022	Roster	25	Mentorship and Sponsorship	12337
1/12/2022	Roster	23	"Trauma and American Presidents: The Evolution of Care to Our Injured Presidents"	12338
1/19/2022	Roster	19	State of Pediatric Transplantation	12339
1/26/2022	Roster	31	Racial Disparity in the Academic Surgical Continuum	12340
2/2/2022	Roster	19	Rural Surgery in North America	12341

If you click on **Roster**, which displays as a blue link, a new screen will display.

You can now see the attendance roster listing attendee names. This data can be exported to an XLS file by clicking the **Export XLS** button.


Attendance Roster for CCOE RSS Example on '9/30/2019'

 Export XLS

ID	Name	Degree	Credit Type	Activity	Description	Credit	Credit Date
<input type="text"/>	<input type="text"/>						
33	Elizabeth Ward, MSJ	MSJ	Non-Physician Attendance	CCOE RSS Example	Directly Provided - Regularly Scheduled Series	1.00	9/30/2019

Select the Unique Participants tab to view the unique participants for the series. This data can be exported to an XLS file by clicking the Export XLS button.

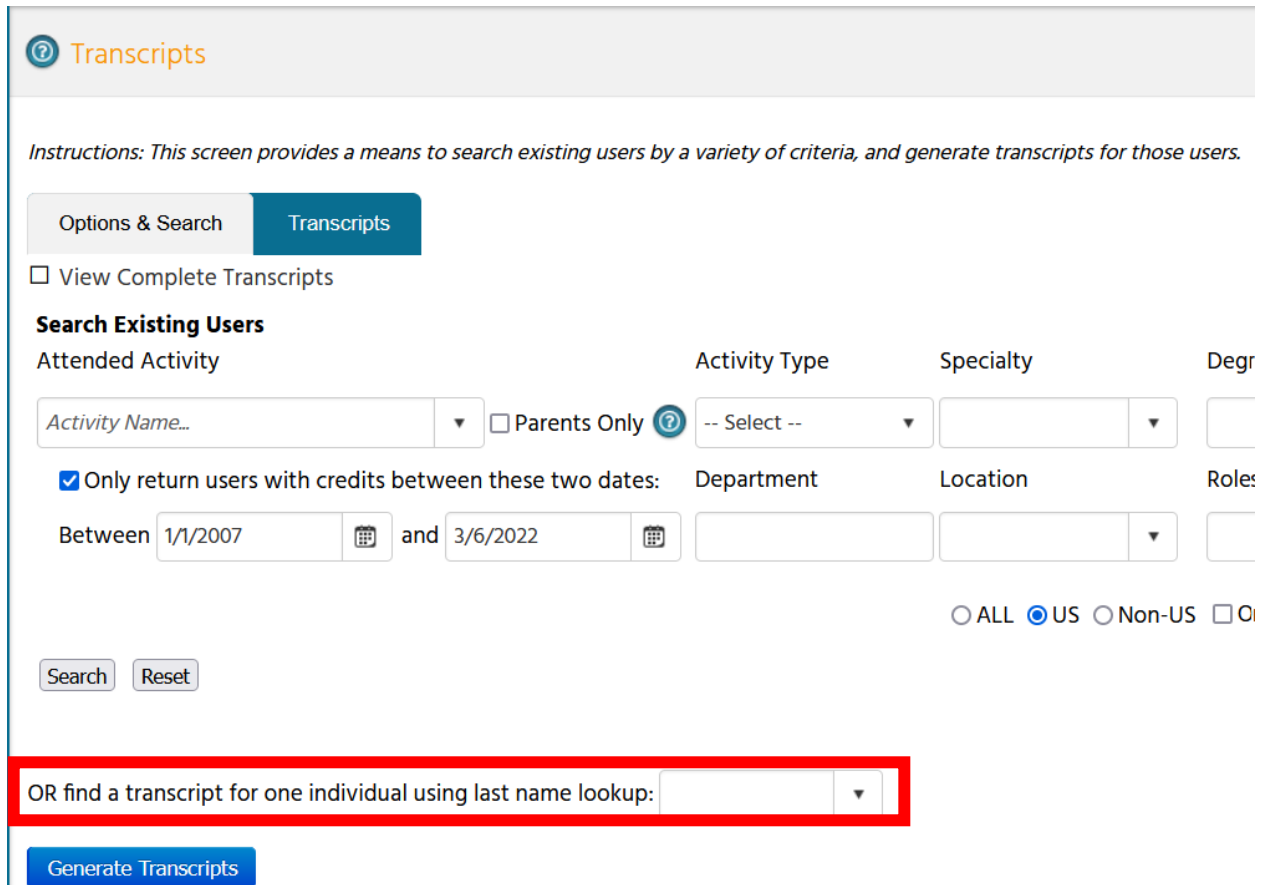
Attendance History Attendance Data **Unique Participants**

 Export XLS

User ID	Email	Last Name	First Name	Degree
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
33	elizabeth.s.ward@rutgers.edu	Ward	Elizabeth	MSJ

Transcripts

The Transcripts report allows you to generate transcripts based on different criteria. Depending on what data you want returned, select the appropriate options on the Options & Search screen, then click Search to generate the transcript report. Or, you can search for an individual transcript using last name lookup.



Transcripts

Instructions: This screen provides a means to search existing users by a variety of criteria, and generate transcripts for those users.

Options & Search **Transcripts**

☐ View Complete Transcripts

Search Existing Users

Attended Activity Activity Type Specialty Degree

Activity Name... ☐ Parents Only -- Select --

☒ Only return users with credits between these two dates: Department Location Roles

Between 1/1/2007 and 3/6/2022

☐ ALL ☒ US ☐ Non-US ☐ Other

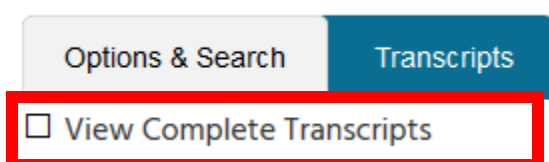
Search Reset

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

Generate Transcripts

A couple options to be aware of are:

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. If you wish to view the attendees' full transcripts when generating the report, you would need to check "View Complete Transcripts" first, then select your activity and any other criteria needed for your search.



Options & Search **Transcripts**

☐ View Complete Transcripts

Only return users with credits between these two dates (checked by default) - this option is checked by default. If you wish to return the transcripts for users regardless of credit between the dates listed, you can uncheck this option.

☒ Only return users with credits between these two dates:

Between 1/1/2007 and 11/1/2019

The transcripts for individuals that meet your search criteria will be listed on the Transcripts tab.

Options & Search Transcripts


You can export this report to a variety of formats using the "Export to the selected format" dropdown. You can also print the report by clicking on the print icon.

Transcripts

Instructions: This screen provides a means to search existing users by a variety of criteria, and generate transcripts for those users.

Options & Search Transcripts

1 of 5 > > Export to the selected format Export



Elizabeth Ward, MSJ
Newark, 07101
UNITED STATES

Transcript Period 1/1/2007 to 3/6/2022 **Created On:** 3/6/2022

Transcript Credit Summary:

AMA PRA Category 1 Credits™: 30.00 Credits	ANCC Contact Hours: 0.00 Credits
ASWB ACE Credit: 4.00 Credits	Commission on Dietetic Registration Continuing
General Attendance: 25.00 Credits	Professional Education Units: 3.00 Credits
Psychologist: APA CE Credits: 0.00 Credits	Non-Physician Attendance: 24.50 Credits