



CloudCME RSS Dashboard Updates

February, 2022

Dashboard Changes

- **Who does this affect?**
 - Any CloudCME user who accesses the RSS Dashboard
- **What is happening?**
 - CloudCME is updating the RSS Dashboard
- **When is this happening?**
 - February 10th, between 6p and 10p
 - Assured there will be no downtime
- **Why is this happening?**
 - More organized and streamlined layout
 - Easier review of all child session data
 - Faster (!!!!!!!!)
- **How do I access it?**
 - Optimized for Chrome

What Is NOT Changing?

- The *5-day Rule* is NOT changing
 - Completed disclosures and mitigations *must be received 5+ business days before an activity*
- Cannot guarantee approval of child activities submitted with less than 5 days' notice
 - Email the whole team at ContinuingEd@hhchealth.org directly with any last minute changes
 - Do NOT assume we will see any last minute changes or additions
 - Include the parent name and child date/code in ALL emails

Old Dashboard View

Activity Name... Parents Only ?

Day
 Week
 Month
 2/2/2022
 3/2/2022
 Status: Pending
 Owner:
 Administrator: -- Select --

Status	ID	Series	Topic	Date	Faculty	Faculty Disclosure
<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PENDING	Parent: 24633 Child ID:29955	HOCC Surgical Education Supporting Fundamentals of Surgery (2022)	ETOH Withdrawal 	Thursday, February 3, 2022 2:00:00 PM - 4:00:00 PM	Rekhinder K Singh, MD Noubar Kevorkian, MD Sharon Weintraub, MD Michelle Horsfield, PharmD Add New Faculty Member <input type="text"/> <input type="checkbox"/>	Rekhinder K Singh, MD: Nothing to disclose - 01/04/2022 - Disclosure Submitted Noubar Kevorkian, MD: Nothing to disclose - 01/19/2022 - Disclosure Submitted

New Dashboard View

CloudCME Town Hall (58877) Parents Only

Date Range: Status: Owner:

Administrator: Location: Department: Planner:

Faculty: Specialty:

Child Status	Details	Topic	QR	Planners & COI Status
APPROVED	<p>Series Name: CloudCME Town Hall</p> <p>Friday, January 7, 2022 11:00 AM - 12:00 PM</p> <p>Location: CloudCME (West Coast Office)</p> <p>Department: R&D</p> <p>Parent ID: 58877</p> <p>Child ID: 58879</p>	<p>CloudCME Town Hall - 1/7/2022</p> <p> </p>	<p><input type="button" value="Single Scan QR"/></p> <p><input type="button" value="Scan In/Out QR"/></p>	<p><input type="button" value="Manage Planners (1)"/></p> <p> Kory Munk, AD (Activity Administrator) </p> <p>Disclosure submitted: 12/13/2021</p> <p>Disclosure: Consulting Fee-Acadia - 12/13/2021</p>



Set Search Parameters in the Dashboard

Find your programs easier

1. Check Parents Only (search through less activities)
2. Enter part of your activity name *or* the parent code
3. Edit Date Range as needed (defaults to next month)
4. Click "Search"

The screenshot shows a search interface with the following elements and callouts:

- Callout 1:** Points to the "Parents Only" checkbox, which is currently unchecked.
- Callout 2:** Points to the "Activity Name..." search input field.
- Callout 3:** Points to the "Date Range" section, which includes two date input fields showing "2/3/2022" and "3/3/2022".
- Callout 4:** Points to the "Search" button, which is a blue button with a magnifying glass icon.

Other visible search parameters include:

- Status: All
- Owner: [Empty]
- Administrator: [Empty]
- Location: [Empty]
- Department: [Empty]
- Planner: [Empty]
- Faculty: [Empty]
- Specialty: [Empty]

Buttons for "Search" and "Reset Filters" are located at the bottom right of the form.

Required Information for Each Child (1)

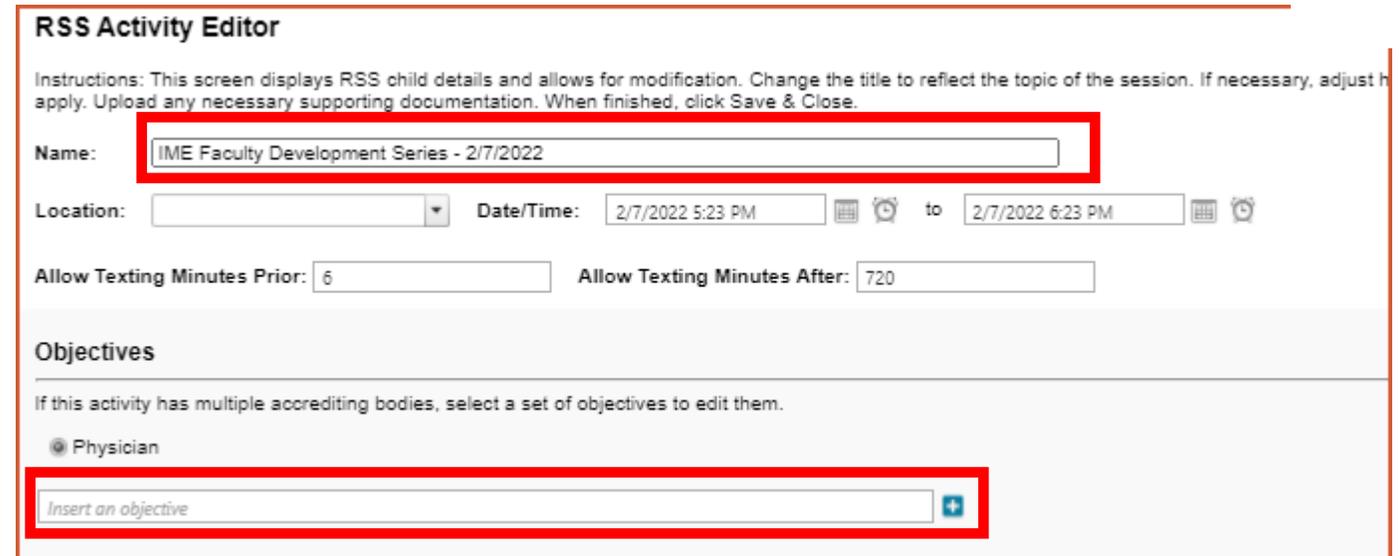
1. Update the title

- *REMOVE* the entire placeholder title
- *REPLACE* with specific topic or title of this child
 - * Transcript shows more comprehensive view of educational activity
 - * Topic change NOT required for case based conferences/committee learning

2. Add/update learning objectives



A screenshot of a topic selection menu. The menu has a blue header with the word "Topic" in white. Below the header, there is a list item with the text "IME Faculty Development Series - 2/7/2022" in blue, underlined. Below the text are four icons: a pencil, a document, a calendar, and a trash can.



A screenshot of the "RSS Activity Editor" form. The form has a title "RSS Activity Editor" and instructions: "Instructions: This screen displays RSS child details and allows for modification. Change the title to reflect the topic of the session. If necessary, adjust h apply. Upload any necessary supporting documentation. When finished, click Save & Close." The form contains several fields: "Name:" with the value "IME Faculty Development Series - 2/7/2022" (highlighted with a red box); "Location:" with a dropdown menu; "Date/Time:" with two date/time pickers showing "2/7/2022 5:23 PM" and "2/7/2022 6:23 PM"; "Allow Texting Minutes Prior:" with the value "6"; "Allow Texting Minutes After:" with the value "720"; "Objectives" section with a radio button for "Physician" and a text input field containing "Insert an objective" (highlighted with a red box) and a plus icon.

Required Information for Each Child (2)

3. Enter Faculty

- ALL faculty must be listed
- All faculty must have a current disclosure on file
 - Must be current as of the date of the child
 - Disclosures expire after one year
 - Exceptions determined by the CE team and topic of education

Manage Faculty for HH Cardiac Cath Case Co (24983) **Must be checked**

Request Disclosure Request Presentation?

	Full Name	Email	Disclosure Date	Disclosure	
<input type="checkbox"/>	Seraphina Canis, MD	[REDACTED]	No Disclosure	NO DISCLOSURE ON FILE	<input type="button" value="-"/>
<input type="checkbox"/>	Deborah Gartley, M.Ed., Paramedic	deborah.gartley@hhchealth.org	1/4/2022	Nothing to disclose - 01/04/2022	<input type="button" value="-"/>

Child Status Definitions

INCOMPLETE



Child is missing something

Check speakers, disclosures, title (topic), & learning objectives

PENDING



Disclosures complete, no potential conflicts reported

May need title and objectives updated before review and approval

APPROVED



Child is fully approved

Event code is now active and can be shared

Do NOT share this code if the child is any other status

REJECTED



Child rejected

Contact CE for further instructions

IN REVIEW



Disclosure incomplete or has disclosed conflicts that need mitigation

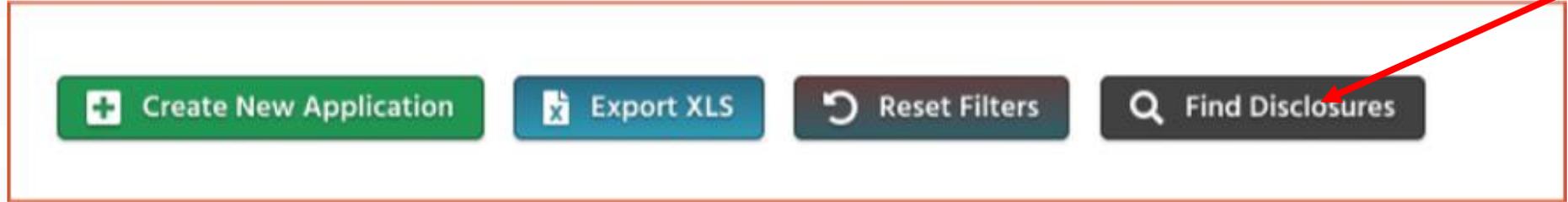
Remind faculty to complete disclosure OR initiate Mitigation Process

Missing Speaker Disclosures

- **Most frequent cause of delay in activity approval**
 - Enter your speakers AS SOON AS you know them, even if you don't have their title
- **AC should check the dashboard regularly to ensure disclosures are complete**
 - CE no longer contacts faculty for missing disclosures unless AC's requests are being ignored
 - Email faculty directly from the Dashboard OR via your Outlook
- **CE does not review a child until all disclosures are complete**
- **Child remains in INCOMPLETE until all disclosures are complete**
 - Child moves to IN REVIEW when there are disclosures that need mitigation
 - Child moves to PENDING when disclosures are complete AND mitigated (if needed)
- **Activity Coordinators are encouraged to initiate the mitigation process** to speed up approval

Search for a Disclosure

On the main Application page



Find Disclosures

Instructions: Enter both first and last name and click Search. If the user is found you will be able to view whether or not they have a disclosure on file. In situations where an individual has two or more accounts, this screen helps to identify the more recently used account as well as the account where that user submitted their disclosure. You will enter this email address in the planners section to add that individual to the application.

First Name: Last Name:

User ID	First Name	Last Name	Degree	Organization	Email	Last Login Date	Form Submission ID	Last Changed	Disclosure
3776	Sabrena	Lary	BS	Hartford Healthcare	sabrena.lary@hhchealth.org	1/19/2022 9:51:41 PM	35549	11/16/2021 8:34:15 AM	Yes
21682	Sabrena	Lary	MD	Hartford HealthCare	sabrena.lary@gmail.com	8/9/2021 5:23:19 PM			No

1. From the main Application page, click "Find Disclosures"
 2. Enter first and last name
 - Be cognizant of spelling, spacing, and punctuation
- Also shows if a person has 1+ accounts

Duplicate Accounts

- **2nd most frequent reason for delay in session approval**
- Don't assume a person's CloudCME account is under the email at which your department normally contacts them
- If a faculty member is taking more than 1 week to complete their disclosure, try to add them as faculty again ... many don't read the instructions and create a new account, and they will appear in the dropdown list under both accounts
- Before creating an account for a person, confirm they don't already have an account
 - Try to add them to the child session under Faculty
- *If you note a person has more than 1 account*, email each of the accounts asking which they prefer to use for CME purposes
 - Copy ContinuingEd@hhchealth.org on the email
 - When they respond, we can merge the accounts

Add A Member

CloudCME Membership

1. Click Membership option on left menu bar
2. Click Add a Member
3. Enter:
 - * First Name
 - * Last Name
 - * Degree (NA if unknown)
 - * Profession
 - * Email
 - * Confirm Email
 - * Password (anything – no one ever sees it)
4. Click Save
5. Cloud sends an automated email with log in instructions

The screenshot shows the 'Add Member' form in the CloudCME system. The left sidebar menu has 'Membership' highlighted. The main form area is titled 'Users' and contains several sections: 'Personal Information' (First Name, M.I., Last Name, Suffix, Degree, Professional Title, Preferred First Name, Spouses Name, Induction Date, Birth Month & Day), 'Credentials' (ABIM, ACP, ABA, ABPath, ABO, ABOHNS, NPI, NABP, ABS Diplomat IDs), 'State License(s)' (Select State License, License Number, Expire Date), and 'Login Information' (Email, Confirm Email, Password, Do Not Send New Member Email checkbox). Red stars indicate required fields.

Complete ALL sections with a red star

Mitigation of Conflicts of Interest

Current Process

1. CE sees in the RSS Dashboard that a speaker or planner has a disclosure
2. CE sends the disclosures, flowchart, and Mitigation form to Course Director and Activity Coordinator
3. Course Director mitigates the disclosures and the form is returned to CE
4. Activity is approved
5. CE sends the Activity Coordinator slides for THAT child only

Mitigation of Conflicts of Interest

Future Process*

– Same as current **OR you can self-initiate the Mitigation Process immediately** upon noting there is a potential COI

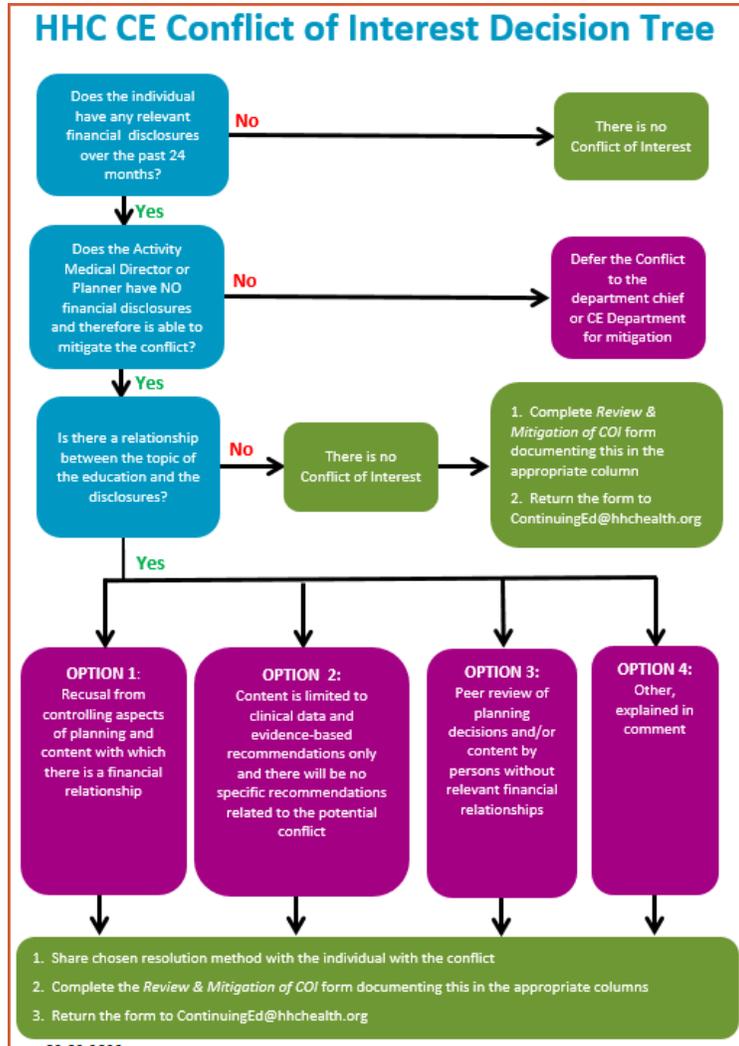
1. Access Flowchart and Mitigation form on our *Tools & Resources* page under “Planners and Directors”
2. Access Disclosure information under *Disclosures and COI Status* column in the Dashboard
3. Send Disclosure, Flowchart, and Mitigation form to your Activity Director
4. Return completed form to ContinuingEd@hhchealth.org

– CE will continue to provide slides for children where a conflict was mitigated

*Allows for faster mitigation and approval of child

Mitigation Forms (on Tools & Resources page)

Mitigation Flow Chart



Review of Mitigation Form

Hartford HealthCare **Review and Mitigation of Faculty or Planner Conflict of Interest**

Activity or Session Title: _____
Date(s): _____

The Activity Medical Director (or a designee) MUST review returned financial disclosure form(s), determine if there is a potential conflict of interest (COI), and select the method (1-4) of mitigation. If the AMD is unable to mitigate a potential COI, please refer this to CE for mitigation.

Name	Role	Disclosure Form Rec'd	Financial Relationship(s) ¹ Reported	COI ² Identified	Method of Mitigation ³ (if COI is Identified)	Comments
_____	<input type="checkbox"/> Planner <input type="checkbox"/> Faculty	<input type="checkbox"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4	
_____	<input type="checkbox"/> Planner <input type="checkbox"/> Faculty	<input type="checkbox"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4	
_____	<input type="checkbox"/> Planner <input type="checkbox"/> Faculty	<input type="checkbox"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4	
_____	<input type="checkbox"/> Planner <input type="checkbox"/> Faculty	<input type="checkbox"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4	

¹**Financial Relationship:** a relationship with an ineligible company where an individual receives a salary, royalty, intellectual property rights, consulting fee, honoraria, speaking fee/training, ownership interest, or other financial benefit
Ineligible Company: any entity producing, marketing, reselling, or distributing health care goods or services consumed by, or used on, patients. Providers of clinical service directly to patients are not considered ineligible

²**Conflict of Interest:** an individual has both a financial relationship with an ineligible company AND the opportunity (as planner or faculty) to influence the content of CE in relation to the products or services of that company

³**Methods of Mitigation:** All directors/planners/presenters/authors are required to complete the Financial Disclosure Form where they attest that the content (1) will be compliant with the [ACCME Standards for Integrity and Independence](#), (2) will be based on the best available evidence, and (3) may require peer review. The following are the available methods of mitigation:

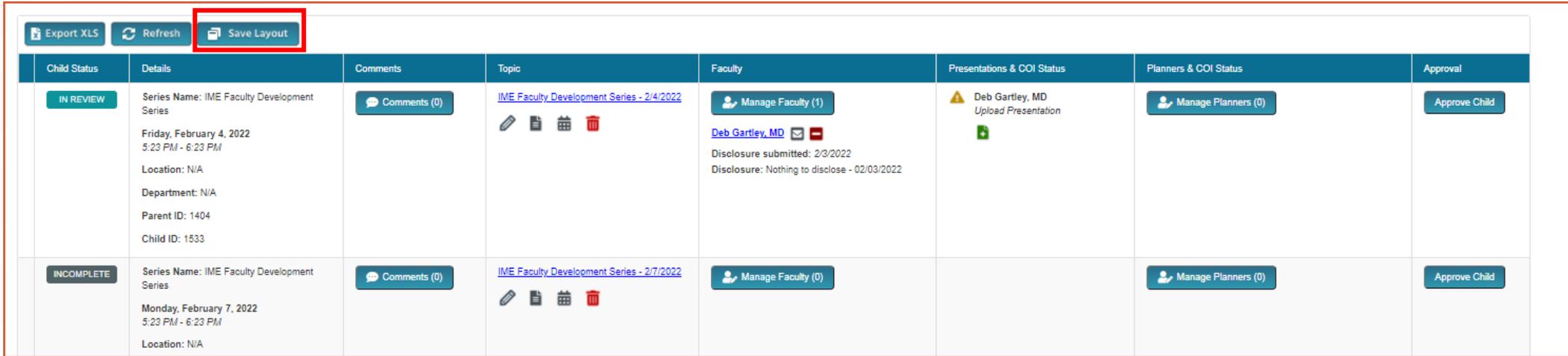
1. Recusal from controlling aspects of planning and content with which there is a financial relationship
2. Content is limited to clinical data and evidence-based recommendations only and there will be no specific recommendations related to the potential conflict
3. Peer review of planning decisions and/or content by persons without relevant financial relationships
4. Other, explain in comment

By typing or signing my name below, I attest that the potential conflict of interest has been fully mitigated. If applicable, I have informed the planner or faculty of the restrictions on their presentation (#2) or I have reviewed the content of the presentation and find it free from bias (#3).

Activity Medical Director or Peer Reviewer: _____ Date: _____

Should an unmitigated conflict of interest be discovered post activity, the Activity Medical Director and Planning Committee for this event will be required to complete education with CE regarding the ACCME's Standards for Integrity and Independence.

Personalize Your Dashboard



Child Status	Details	Comments	Topic	Faculty	Presentations & COI Status	Planners & COI Status	Approval
IN REVIEW	Series Name: IME Faculty Development Series Friday, February 4, 2022 5:23 PM - 6:23 PM Location: N/A Department: N/A Parent ID: 1404 Child ID: 1533	Comments (0)	IME Faculty Development Series - 2/4/2022 ✎ 📄 📅 🗑️	Manage Faculty (1) Deb Gartley, MD ✉️ 🚫 Disclosure submitted: 2/3/2022 Disclosure: Nothing to disclose - 02/03/2022	⚠️ Deb Gartley, MD Upload Presentation 📄	Manage Planners (0)	Approve Child
INCOMPLETE	Series Name: IME Faculty Development Series Monday, February 7, 2022 5:23 PM - 6:23 PM Location: N/A	Comments (0)	IME Faculty Development Series - 2/7/2022 ✎ 📄 📅 🗑️	Manage Faculty (0)		Manage Planners (0)	Approve Child

Recommended KEEP Columns

- Status
- Details
- Topics
- Faculty
- Presentations & COI
- Planners

Recommended DELETE Columns

- QR Code (we don't use QR codes)
- Targeted Audience
- Owners

1. Right click blue bar to add/delete columns
2. Drag and drop the columns into order
3. Click "Save Layout"

Change Child Date / Cancel Child



Cancel a Session

- Click the red garbage can
- Enter a reason

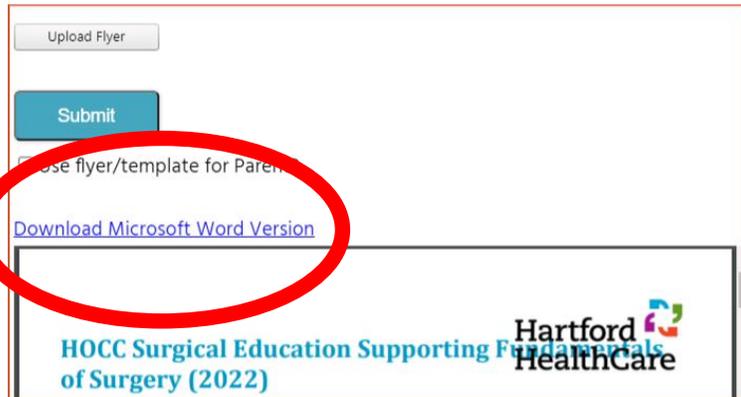
Change Date/Time

- Click on the pencil icon or the topic link
- Edit in the Activity Editor
- **Do NOT use the calendar icon**

Updating Flyers (1)



1



2

WHY?

- Update Zoom or VMR info so learners can find your program
- Add a speaker bio or update their title
- Condense into one page

HOW?

1. Click on paper icon in the topic column
2. Download the Cloud-generated flyer
3. Edit the flyer in Word
 - If creating your own flyer, you MUST use the Disclosure and Accreditation Language *verbatim* on your new flyer

Updating Flyers (2)



Upload Flyer

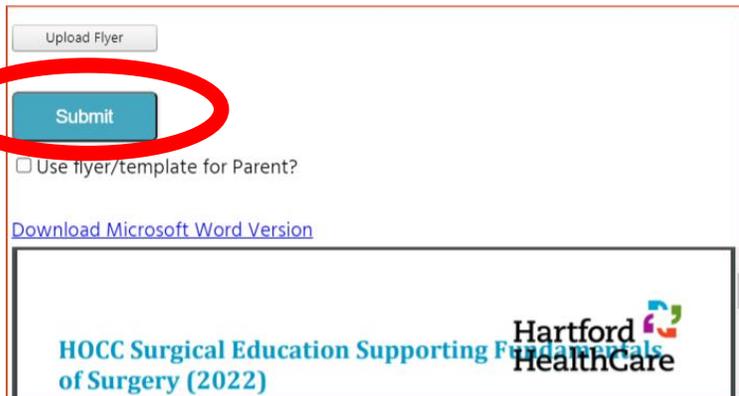
Submit

Use flyer/template for Parent?

[Download Microsoft Word Version](#)

HOCC Surgical Education Supporting Fundamentals of Surgery (2022) Hartford HealthCare

5



Upload Flyer

Submit

Use flyer/template for Parent?

[Download Microsoft Word Version](#)

HOCC Surgical Education Supporting Fundamentals of Surgery (2022) Hartford HealthCare

6

HOW?

4. Save updated flyer
5. Upload new flyer to Cloud
6. Submit new version to Cloud

The updated flyer, with the live location or virtual link, will now be accessible to any person who clicks on the activity in the Attendee Portal

Mandatory Activity Slides

1. Event Code Slide

- Enter individual event code on this slide for learners to text in their attendance
- Used for *every* activity

2. Evaluation Slide

- Used *only* if there is an evaluation required for the activity

3. Financial Disclosure Slide

- Used for *every* activity

Event Code Slide

Recording Your Attendance

1. Pair your phone with your CloudCME account (ONE TIME ONLY)
 - Text your email address to **(844) 962-4001**
 - **You may need to create an account** in CloudCME (hhchealth.cloud-cme.com)
 - **DO NOT** make a brand new account if you already have one through HHC CE. Contact us if you don't remember the email you used.
 - Confirm a return text that your phone number has been updated
2. Text the *EVENT CODE* (below) to **(844) 962-4001**
3. Confirm a return text that you have been signed in

Contact ContinuingEd@hhchealth.org with any problems related to credit

EVENT CODE

26472

This code expires 120 minutes after the end of this activity.

Evaluation Slides

Slide 1 (has step 4)

Record Your Attendance

1. Pair your phone with your CloudCME account (*ONE TIME ONLY*)
 - Text your email address to **(844) 962-4001**
 - **You may need to create an account** in CloudCME (hhchealth.cloud-cme.com)
 - **DO NOT** make a brand new account if you already have one through HHC CE. Contact us if you don't remember the email you used.
 - Confirm a return text that your phone number has been updated
2. Text the *EVENT CODE* (below) to **(844) 962-4001**
3. Confirm a return text that you have been signed in
4. Complete the evaluation *within 4 weeks* to Claim Your Credit

Contact ContinuingEd@hhchealth.org with any problems related to credit

EVENT CODE

29699

This code expires 120 minutes after the end of this activity.

Slide 2 (if evaluation required)

Claim Your Credit

The screenshot shows the 'My CME' section of a website. At the top is a navigation bar with links: SIGN OUT, BROWSE BY SPECIALTY, LIVE COURSES, ONLINE COURSES, RSS CALENDAR, ABOUT, RESOURCES, and MY CME. A red arrow labeled '1' points to the 'MY CME' link. Below the navigation bar is the 'My CME' header with the instruction: 'Instructions: Click a button to proceed.' A red arrow labeled '2' points to the 'Evaluations & Certificates' button in a grid of buttons. The grid contains the following buttons: Profile, Transcript, Evaluations & Certificates, Registrations & Receipts, Claim Credit, External Credits, Tests, and Syllabus.

Disclosure Slides

Financial Disclosures

- Dr. Bugs reports a Consulting Fee from Acme. This has been mitigated.
- No other speakers or planners of this activity have reported any financial relationships.

Financial Disclosures

- Dr. Bugs reports a Consulting Fee from Acme. This has been mitigated.
- No other speakers or planners of this activity have reported any financial relationships.
- Please share any individual financial relationships now with the conference group to avoid any real or perceived commercial bias.

Financial Disclosures

- No speakers or planners of this activity have reported any financial relationships.

- **Slides are activity specific**
 - Slide layout will change depending on what category of activity
 - Top – didactic education with mitigation
 - Middle – case based education or committee learning with mitigation
 - Bottom – didactic education with no disclosure
 - Slide template provided to planners of parent activity upon approval of parent
- **Use these slides for every child unless there is a conflict that needs mitigation**
 - EXCEPTION: CE will send new slides for each child needing a disclosure mitigated
- **Use of incorrect disclosure slide puts accreditation at risk for system**
- Contact ContinuingEd@hhchealth.org with any questions

Sharing Slides and Codes

- Sharing slides
 1. At the beginning of each session
 2. At the end of each session
 3. Enter the event code in the chat room during the session

* **TIP:** Train your participants to look in the chat room if they are late
- Do *NOT* add the event code to any agenda or email to invitees
 - Participants **MUST** be present in the activity to get the code
- If participants miss the texting window, email us

Mobile Application

Benefits

- Use any smartphone or tablet
- Access the calendar, evaluations, transcripts, certificates, register for an activity
- Audience Response System for polling

Challenges

- Creates problems when learners attend a program that *does* require an evaluation
 - Allows learners to bypass all required evaluations
 - Discourage use of mobile app to record attendance
- Learners can not take post-activity tests via the app

Mobile App Code: hhchealth

