Regularly Scheduled Series (RSS) Policies & Procedures

Continuing Medical Education

UNIVERSITY OF IOWA
CARVER COLLEGE
OF MEDICINE

University of Iowa Health Care

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Questions? Please contact:
Leann Hotchkiss or Paul Walker at **rss-cme@healthcare.uiowa.edu**

For an updated booklet, please visit
College of Medicine CME website

Prior to Approval

Joint Accreditation

In support of improving patient care, The University of Iowa Roy J. and Lucille A. Carver College of Medicine is jointly accredited by the Accreditation Council for Continuing Medical Education (ACCME), the Accreditation Council for Pharmacy Education (ACPE), and the American Nurses Credentialing Center (ANCC), to provide continuing education for the healthcare team.

As a Jointly Accredited provider, the University of Iowa Roy J. and Lucille A. Carver College of Medicine is accredited to provide Continuing Education for the following professions:

Physicians (*AMA PRA Category 1 Credit*™), **Nurses/Advance Practice Nurses** (ANCC Contact Hours), **Pharmacists/Pharmacy Technicians** (ACPE Credit), **Social Workers** (ASWB ACE Credit), **Athletic Trainers** (BOC CEU Credit), and **Dietitians** (CDR CPEU Credit).

RSS Applications & Renewal Forms

Current activities are approved through December 31, 2024.

We review & mitigate all disclosures of activity Course Directors and other planners at the time of the renewal process.

Renewal Process

Activities will need to complete a full application every three years. In between, a renewal form will need to be completed.

Group A

Dermatology	Ophthalmology	Radiology
Family Medicine	Pathology	Sports Medicine
Internal Medicine	Psychiatry	Urology

- 2024 - Completed full application
- 2025 – Will need to be complete renewal form
- 2026 – Will need to complete renewal form

Group B

Anesthesia	Neurosurgery	Pediatrics
Heart & Vascular Center	Ob/Gyn	Student Health
Hospital Administration	Orthopedics	
Neurology	Otolaryngology	

- 2024 – Completed renewal form
- 2025 – Will need to complete full application

March 26, 2024

- 2026 – Will need to complete renewal form

Group C

Cardiothoracic Surgery	ICTS	Surgery
Emergency Medicine	Pharmacy	Tumor Boards

- 2024 – Completed renewal form
- 2025 – Will need to complete renewal form
- 2026 – Will need to complete full application

Before Each Session

Commercial Support & Exhibits

Planning and delivery of CME content must be completely free of commercial interests and commercial bias.

Commercial Support is a financial contribution given by an ineligible company, which is used to pay all or part of the costs of a CME activity, such as an <mark>unrestricted educational grant</mark>. Advertising and exhibit fees are excluded from this definition.

- If you are going to receive commercial support, please contact Teri Thomann in the CME office at 319/353-3023 or teresa-thomann@uiowa.edu two weeks prior to the session.
- Please keep track of the income you receive to report this at the end of the year.

<mark>Exhibits</mark>. Attendees must be able to easily distinguish between accredited education and other activities.
- All exhibitors must be in a room or area separate from the education; the exhibits must not interfere or in any way compete with the learning experience prior to, during, or immediately after the activity.
- Representatives of the company exhibiting may not engage in sales or marketing activities while in the space or place of the educational activity.
- Marketing and exhibits developed by or with influence from an ineligible company cannot occur in the educational space within 30 minutes before or after an accredited education activity.
- Please keep track of the income you receive to report this at the end of the year.
- For questions or assistance with advertising or exhibits please contact Teri Thomann in the CME office at 319/353-3023 or teresa-thomann@uiowa.edu.

RSS Dashboard

☐ To open the RSS Dashboard:
- https://uiowa.cloud-cme.com
- Click the "Sign In" box in the upper left
- Log in with HawkID and password
- In the black footer, click "Administration"
- Along left side in blue, click "Activities" then "RSS Dashboard"
- Adjust the date range, if needed
- Change the status to "All," if needed

☐ Adjustments to column layout are suggested
- We do not use the QR codes, so please hide that column by right-clicking on the column header and deselecting that title of that column.
- Move other columns around if you'd like by clicking the column header and dragging it to the desired location.
- Save layout – see screen shot above.

☐ Prepare your sessions in CloudCME – ==**for Lecture**== activities
- Edit the session by clicking on the link in topic column
  - o Required:
    - – Add the title (or topic) of presentation to the name field. This will appear on attendee transcripts and flier
  - o Optional:
    - – Verify that the location is correct (use the drop down to change)
    - – Edit the start & end date and time, if needed
    - – Adjust objectives, if needed
    - – Edit the specialties, if needed
    - – Edit the professions, if needed
  - o Scroll to the bottom and click "Save & Close"

☐ Cancelled? click the red trash can below the title
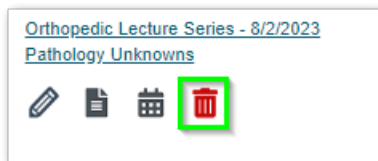
☐ If you need to add a new session, either change the date of an unused session or email rss-cme@healthcare.uiowa.edu

☐ Editing a date or time on a session

- In the RSS Dashboard, click the link in the Topic column.
- Change the date in 3 places. If you need to change the time, the clock icons are there as well.

- If you shorten or lengthen the time, please let Le know as she'll have to edit the number of credits.
- Scroll down and click Save & Close.

☐ To get the code for texting, find the number next to "Child ID" in the far-left column.

Collect Disclosures

Faculty
In the CME world, "Faculty" refers to the presenter. This could be a student, staff member, resident, etc. We may use this interchangeably with presenter or speaker.

Every speaker (including non-physicians) is required to disclose all financial relationships with an ineligible company within the prior 24 months. There is no minimum financial threshold; individuals must disclose all financial relationships, regardless of the amount, with ineligible companies. Individuals must disclose regardless of their view of the relevance of the relationship to the education.

Deadline
All requirements must be met by 3:00 pm five business days prior to the event.
For example: a Friday session would need to have a presenter, title (if applicable), objectives and be mitigated by 3:00 pm the prior Friday. The exception would be if there's a holiday on Monday, then it would need to be mitigated by 3:00 pm the prior Thursday *(five business days)*.

Who discloses?
- ☐ **Lectures** – the presenter/faculty needs to disclose
- ☐ **Journal Clubs** – the facilitator or presenter needs to disclose . We do not need any disclosures to be mitigated though, as the articles have already been peer reviewed.
- ☐ **Case Conferences** – moderators and/or supervising faculty will need to disclose. If there are no moderators, core presenters can be pre-populated in each session. Disclosures will not need to be mitigated because the education is via group discussion.
- ☐ **Tumor Boards** – the individual/s who bring a case forward. This may include several individuals, and they can be pre-populated in the RSS Dashboard. In these types of sessions, disclosures will not need to be mitigated because the education is via group discussion.

Collect disclosures for faculty:
- Within UI Health Care
- Within UI, but not UI Health Care
- External to UI Health Care

Exceptions:
Accredited providers do not need to identify, mitigate, or disclose relevant financial relationships for any accredited education that is non-clinical, such as leadership or communication skills training.

If your faculty are <u>within UI Health Care</u> . . .
- ☐ Click "Manage Faculty" in the "Faculty" column.
- ☐ Enter the last name of your speaker (and part of the first name if needed), verify the email is correct, and then click "Add Faculty." If you don't see them listed:
  - Do you know that they text attendance regularly? If yes, contact Le.
  - Are they new? Ask them to log in with their HawkID & password, then complete their profile. Repeat this process once that is complete.

March 26, 2024

☐ Once they appear in the table below, just "x" out of screen.

☐ Review that the name/s have appeared correctly in the "Faculty" column. Their disclosures, if any, will be in the same cell.

- If it lists "NO DISCLOSURE"
  - Please ask them to update their disclosures in eCOI.
    - Once completed it will appear in the RSS Dashboard in 1-2 days
  - If you know they've disclosed already but it isn't showing up:
    - Have they ever logged into CloudCME? If not, they'll need to do that.
    - Double-check the profile selected – is the email correct? Do they have two accounts with different emails? (If yes – Let Le know)
    - Has their name ever changed while attending sessions here? Perhaps they have another account with their prior name. (If yes – let Le know)

If your faculty are _within UI (but not UI Health Care) . . ._

☐ Ask Le to see if she can find them in the eCOI site, where other UI employees would appear, and she can confirm their disclosure information.

☐ FYI – only UIHC or external presenters will appear in the RSS Dashboard

If your faculty are _NOT within UI Health Care . . ._

They disclose right in CloudCME

☐ Check if the presenter is already in the system.

- Click "Manage Faculty" in the "Faculty" column.
- Enter the last name of your speaker (and part of the first name if needed), verify the email is correct
- If you find them, click on their name to add. Jump to "Identify relevant financial relationships" below
- If the presenter is from the VA and are using a VA email address, see if they have an appointment with UI as well (https://iam.uiowa.edu/whitepages/search). If they do, ask them to log into CloudCME with the HawkID and password and complete their profile. Then, if they've completed their disclosure within eCOI already, it will populate into the RSS Dashboard the following morning. Let us know if this is the case and we can merge their two profiles.
- If you don't see them listed, they'll need to be added to the system. Follow the next bullet.

☐ To add an external presenter to the system:

- Along the left side in blue, go to Membership – Add Member.
- Complete the basic info – everything with a * - this includes their first name, last name, degree, profession, and email address.
- For their password, please use their email address OR REMEMBER WHAT YOU GAVE THEM

- Please check the box which states that you don't want an email sent to them (you'll do that later).
- Please be sure everything is ==entered correctly== as you won't be able to edit it, including the email address.
- Scroll to the bottom and click Save.

- ☐ Email the presenter
  - Please be sure the button is selected for "Do not send new member emails" (as seen above in green box). Close the pop-up window that appears once you've saved the new profile. Instead, you'll personally email the presenter.
  - Please use the following text & image in your email
  - *To complete your disclosure form:*
    - ○ *Using Chrome (not Internet Explorer) please visit https://uiowa.cloud-cme.com/ and login with your email. The password is your email address ==(OR WHATEVER YOU ASSIGNED THEM)==*
    - ○ *If you have trouble with that, please select "Forgot Your Password."*
    - ○ *You may be prompted to complete your profile, do that if necessary.*
    - ○ *Then, click the Faculty button towards the top, which will take you to your disclosure form.*
    - ○ *Please complete, and when ready, click "Submit" to finalize.*
    - ○ *If there are any issues, you can also go directly to the disclosure form at https://uiowa.cloud-cme.com/Form.aspx?FormID=3368*
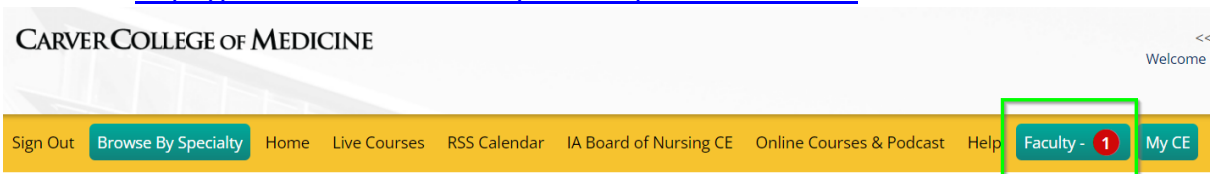
- ☐ Go back to the session in the RSS Dashboard
  - Click "Manage Faculty" in the "Faculty" column.

- This is essential to do asap, so that when the presenter logs into the system the disclosure form will be assigned.
- Enter the last name of your speaker (and part of the first name if needed), verify the email is correct, and then click "Add Faculty."

☐ Once they've completed their disclosure, it will automatically show up in the RSS Dashboard.

Review & Mitigate Disclosures

Eligible vs Ineligible Companies
- An ineligible company is one whose primary business is producing, marketing, selling, re-selling, or distributing healthcare products used by or on patients.
- Relationships with ineligible companies need to be mitigated. If they are with an eligible company, they do not need to be mitigated.
- For examples on these two types, please visit: https://accme.org/accreditation-rules/standards-for-integrity-independence-accredited-ce/eligibility

Identify relevant financial relationships:
Review the information disclosed to determine which relationships are relevant. Financial relationships are relevant if the educational content an individual can control is related to the business lines or products of the ineligible company.

Owners, Employees, Founders
If the presenter/faculty is an owner, employee or founder of an ineligible company, they are not allowed to control educational content (be a presenter). There are however, three exceptions. If the below is applicable to your session, we can offer credit.
- When the content of the activity is not related to the business lines or products of their employer/company.
- When the content of the accredited activity is limited to basic science research, such as pre-clinical research and drug discovery, or the methodologies of research, and they do not make care recommendations.
- When they are participating as technicians to teach the safe and proper use of medical devices, and do not recommend whether or when a device is used. There is a special form that would need to be completed in this scenario.

Please email their slides to rss-cme@healthcare.uiowa.edu at least one week in advance of the session.

Mitigate relevant financial relationships:
Take steps to prevent all those with relevant financial relationships from inserting commercial bias into content.

If the presenter/faculty has a relevant relationship with an ineligible company, please choose from one of the following options:

1. Send them an email asking them to agree or disagree with the following. *"I attest that the clinical recommendations are evidence-based and free of commercial bias (e.g., peer-reviewed literature, adhering to evidence-based practice guidelines)"* or,
2. Have someone from the planning committee, who does not have a disclosure themselves, complete a mitigation review form.
   a. Internal presenter? Mitigation forms can be found on the <u>webapp</u>.
      i. Click the bottom link – as a coordinator
      ii. Login with HawkID & password
      iii. Click "Disclosure Review Report"
      iv. "Select UI Employee"
      v. Search by last name
      vi. Complete the top portion
      vii. Give to reviewer
   b. External presenter? Mitigation forms can be found <u>online</u>

Upload the completed mitigation to the RSS Dashboard.
- Save attachments to your drive (only accepts .pdf, .txt or .docx)
- In RSS Dashboard, click on Topic link for that session
- Under Supporting Documentation, click the Select button and navigate to where you saved the .pdf or .docx. Select those to continue.
- Add more than one, if needed
- Scroll down and click "Save & Close"
- For the first few you may want to double-check that the uploads were saved and are visible within the session.

Fliers

All activities must have fliers that are shared with potential attendees prior to the sessions. These may be shared in the body of an email, as an attachment, or in an Outlook Calendar invite. There are several required elements in the flier – as directed by our accrediting bodies. These may change at any time, and we'll update

the flyer template. Because of this, please download the flier for each session (unless you're a case conference or tumor board).

When you're in the RSS Dashboard, please click the paper icon under the topic title. You can download either a .pdf or a .docx. Feel free to add information prior to sharing, just keep everything already there.
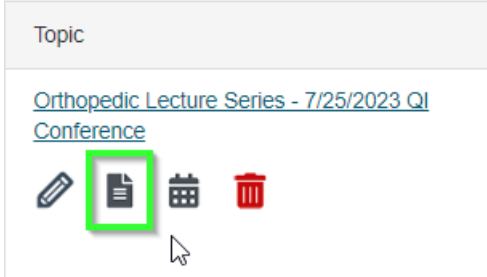
If you find that anything needs to be changed on the flier, such as a planner, email rss-cme@healthcare.uiowa.edu

For case conferences and tumor boards, feel free to add the dates for the upcoming 6-12 months on the flier, and share that with your audience throughout the year.

Dates:

01/05/16	03/22/16	05/03/16
01/12/16	03/30/16	05/10/16
01/26/16	04/05/16	05/18/16
02/02/16	04/12/16	06/14/16
02/09/16	04/19/16	06/21/16
03/08/16	04/26/16	

During Each Session

Attendance

The ACCME requires that we report the number of **everyone** in attendance. Speakers are not eligible for credit from sessions at which they present, and they should be excluded from texting.

To text attendance individuals must have a profile in the system. We recommend allowing time during the new hire orientation to login with their HawkID & password and complete their profile.

Shareable instructions can be found towards the end of this booklet.

After the Session

Manually Recording Attendance

If an attendee didn't record their attendance, they can text up to 12 hours after the session ends. Because of this, I would expect you wouldn't have to manually record very often. If it's been more than 12 hours, you can still manually record their attendance at any time.

For instructions on how to do this – please see the end of this booklet.

Evaluations & Certificates

Evaluations completed within CloudCME <mark>are required</mark> for us to continue offering credit for your activities. Several professions such as social workers, need to have a completion certificate for their accrediting bodies. They will obtain a completion certificate after completing the evaluation.

Please notify and remind your attendees throughout the year that evaluations are available after every session when they text attendance. The italicized directions below can be shared with attendees for completing evaluations.

To complete an evaluation:
- *Text your attendance (please do not "claim credit" on the app or website)*
- *Once the session is over visit https://uiowa.cloud-cme.com/cme/EvalsAndCerts using Chrome, FireFox, or any browser other than Internet Explorer.*
- *Sign in with your HawkID and password*
- *Select "Download Certificate" for the name of the program you are evaluating*
- *Click "Yes" for completing the optional evaluation*
- *Your completion certificate will then be available for download*

Throughout the Year

Financial Summary

- ☐ Please keep track of any income received that was associated with your program/s. This might include commercial support, exhibit/advertising income, government monetary grants or private monetary donations.
- ⌨ E-mail your totals to RSS-CME@healthcare.uiowa.edu at the end of the year, by 02/15.

Personnel Changes

Please communicate any changes in who holds the position/s of Course Director, planner, or yourself 😊 immediately to rss-cme@healthcare.uiowa.edu

Transcripts

Individual transcripts can be run three different ways.
- ☐ By the employee via website:
  - Go to https://uiowa.cloud-cme.com and log in with your HawkID and password
  - Click "My CE" in the upper right of your screen
  - Click "Transcript"
  - Type in your desired date range
  - Download the transcript
- By the employee via mobile app:
  - Download the "CloudCME" app
  - The organization code is "uiowa" all in lower case.
  - Login with your HawkID and password
- ☐ You can also alias as someone to pull their transcript. Please follow the below steps:
  - In the black footer, next to the "Administration" link, there is a white rectangular box. Start by typing in the individual's last name
  - Select the person's name
  - Click "My CE" in the upper right of your screen
  - Click "Transcript"
  - Type in your desired date range
  - Click "Apply"
  - Download the transcript
  - To switch back to being yourself – select your name from the rectangular box in footer.
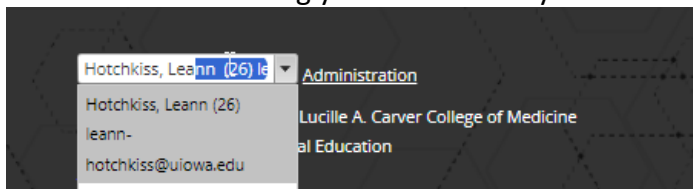
To get transcripts of *everyone whose attended*:
- ☐ Click "Administration" in the footer (as shown in the image above)
  - Go to Reports – Transcripts
  - Complete the fields as shown below, clicking "Search" when ready

-
- It will take some time, but transcripts of everyone whose attended in whatever time period you ran will appear in the "Transcripts" tab.
- You can select what output you would like, such as excel, and then the information can be exported for your manipulation.

- Please Note:
  - Data will only pull from the time period of whatever activity you select.
  - For example, as of 2024, if you select the program listed on the top, it will be for the time period of calendar year 2024 (please see below).
  - If you select the second from the top, it will be for Fall 2023.
  - Third one down will be from July 1, 2022 – June 30, 2023.

  - So even if you enter July 2023 – December 2024 on the top program listing, it will not pull data from July 2023-December 2023.
  - If questions, please let me know.

Credit Report

If the planners (including Course Director/s) would like to see who specifically has attended the activity in the prior six months – one year, you can run a Credit Report.

- ☐ Click "Reports" then "Credits"
- ☐ Want a report for just one session?
    - In the activity field, type the name of your session and click it once found (may need to scroll down to get a particular date – let your mouse hover over the title and a little window will pop up with the date)
- ☐ Want a report for the last six months, for example?
    - Adjust the date range
        - ▪ Please Note: in 2023 and prior, we ran on a fiscal year - 7/1-6/30. Data will be under program ID#s based on that date range. So, if you want the full calendar year, two reports would need to be run with different program ID#s. Beginning January 2024, we will run on a calendar year.
    - Click "Parents Only" (this is the umbrella program that all sessions sit in)
    - Type the name of the program
- ☐ Click on the program name that you're looking for
- ☐ Click "Run Report"
- ☐ Click "Export XLS"

RSS Attendance History Report

If the planners (including Course Director/s) would like to see which sessions have been attended more than others, or to easily see trends in numbers of attendees, you can run an RSS Attendance History report.

- ☐ Click "Reports" then "RSS Attendance History"
- ☐ Be sure that "Parents Only" is checked.
- ☐ Start typing your program name in the white box.
- ☐ Adjust your date range.
    - o Please Note: in 2023 and prior, we ran on a fiscal year - 7/1-6/30. Data will be under program ID#s based on that date range. So, if you want the full calendar year, two reports would need to be run with different program ID#s. Beginning January 2024, we will run on a calendar year.
- ☐ Click "Run Report"
- ☐ There will be three tabs to review: Attendance History, Attendance Data, and Unique Participants.
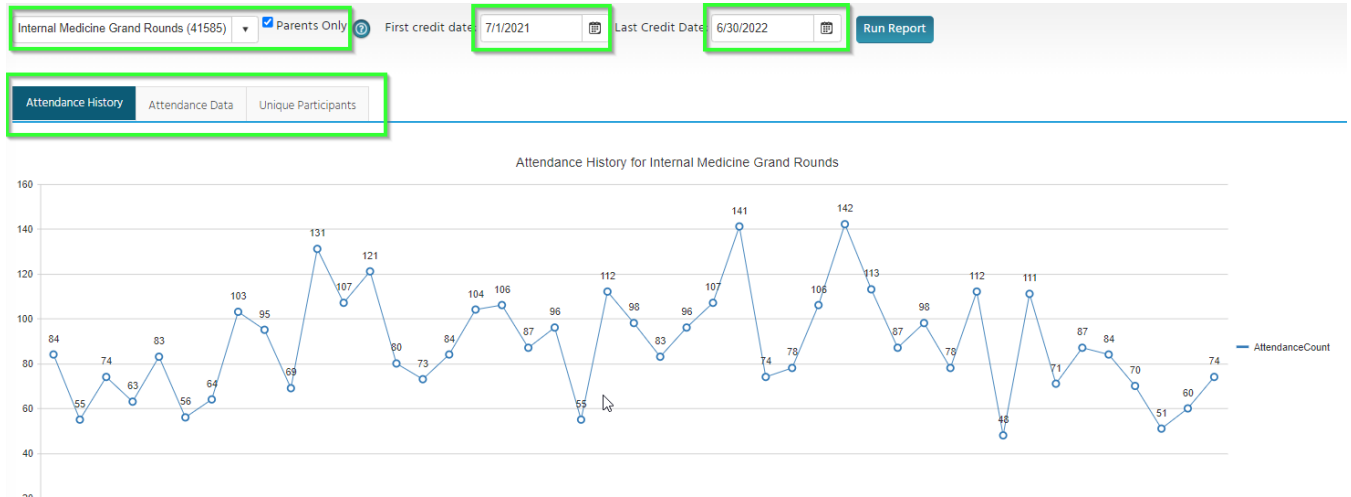
Evaluation Reports

You have access to run <mark>evaluation reports</mark> to review the submitted feedback. The evaluation report provides a visual display of user responses to specific activity evaluations.

- Go to Reports - Evaluations
- Enter in the title in the search box (as it appears in the RSS Dashboard) or the Child ID#
    - Each date/session will need to be entered separately
- You can define the graphic display by showing or hiding the display types (charts, tables, objectives, faculty, comments and/or show all).
- The data will display on the Chart Results tab.
- The evaluation questions will display in the Questions column. You can deselect evaluation questions that you do not wish to see the data.
- Please share these with the planning committee, maybe quarterly or twice a year.

Division of Duties

Management of an RSS includes various tasks, some of which must be completed by the series Course Director and others of which can be completed or overseen by the coordinator.

Course Director	Coordinator
Educational planning – along with Planning Committee members – includes completion of online RSS Application and/or renewal documentation	Maintain series documentation – mitigations – activity fliers – financial summary
Review evaluation summaries & modify program, if needed	Coordinate program evaluations
Selection and oversight of a coordinator	Notify Le when there are changes to the program, planners, Course Director, or yourself.
Resolution of potential conflicts of interest before the educational activity	Maintain accurate records of sessions in CloudCME

General Tips

For best performance and compatibility, we recommend using the latest version of Chrome. Internet Explorer is not supported.

Do you offer sessions on Zoom? Consider adding the texting code to your profile picture.

To review your program/s information that is shared online re: your schedule, etc., please review the "Series" on the CloudCME homepage. You can find the Series tab in the gold bar.

ne   Live Courses   Series   IA Board of Nursing CE   On-Demand Courses & Podcast   Help

Series

Activities for the current month are displayed below. To register for a regularly scheduled series, login first by clicking the 'Login to Portal' button to the left.

Activity Type: Regularly Scheduled Series   X

Show   10   Results per Page   1   2   3   4   5   »

Details ℹ

Acute Care Surgery Journal Club
Occurs every 3 months on the 2nd Monday starting on 3/11/2024 at 12:00 PM

Target Audience:
     Specialties - Surgery
Credits: AMA PRA Category 1 Credits™ (1.00 hours), Non-Physician Attendance (1.00 hours), ANCC Contact Hours (1.00 hours)

Group discussion/journal club analyzing and discussing published journal articles. CE credit for this

Texting Attendance for CME Activities

Step 1:
Please login with your HawkID & password at uiowa.cloud-cme.com Please complete your profile when prompted.

Step 2:
Text your @uiowa.edu email address to (844) 980-0525. You only need to do this once. SMS text only (not an iMessage).

Step 3:
You should receive a message that your phone number was updated.
*-If instead you receive a message that **user cannot be found**, please double-check for typos in your email address.*

Step 4:
Text this session's activity code to record your attendance. Do this 15 minutes prior, during, or up to 12 hours after the session ends.
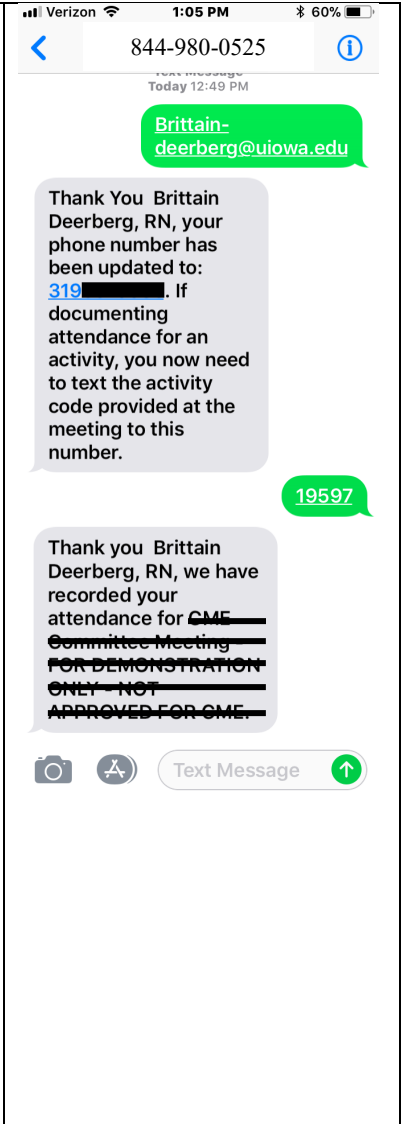
Step 5:
You'll receive a confirmation that your attendance was recorded.

Recommended:
Save this phone number as a contact as you'll use it again.

Questions?
Contact Leann Hotchkiss in the CME office at leann-hotchkiss@uiowa.edu

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Find more Regularly Scheduled Series' in UIHC:
- Visit *uiowa.cloud-cme.com*
- Login with your HawkID & password
- Click "Series" towards the top in gold bar
- Use the search features to find activities by specialty, profession, credit type, etc.

🔍 Search

Record Attendance

Nicole Younce
Created on: August 25, 2022 12:45
Last Updated on: Wednesday at 13:32

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[Attendee Status](#)

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[Searching and Sorting](#)

[Saving Attendance & Credit](#)

[Removing Attendees or Credit](#)

Related articles

Import Members

Credit Manager

CloudCME® Webinar Archive

CloudCME® API Setup

Integrations

Overview

Attendance can be recorded using the **Record Attendance** screen for users with access to this screen. Before recording attendance, it is best to understand each part of the screen and its functions.

From the main menu, go to **Activities > Record Attendance**.

📙 **Activities** ⌄
— Activity Grouping
— Activity Import
— Activity Manager
— Application Reviewers
— Attendee Certificates
— Credit Manager
— Manage Owners
— Online Content / Tests
— Record Attendance

Activity Controls

At the top of the screen, enter the activity name and select from the drop-down list. The screen will present many activity details including the activity attendees.

The top section of the page will show the activity details and the activity-related controls. Use the buttons on the right to open the panels that will allow you adjust activity options, add users, or import a spreadsheet. In the Activity Options users can set the desired credit hour values (up to the maximum) that will be recorded.

The progress bar allows users to view the number of attendees that are on the roster and have attendance recorded.

Attendance Recorded: 3	Total Users on Roster: 7

Attendance and credit can be added or removed for users and grid date can be exported to an Excel file.

Attendee Records

In the main grid, each attendee record is formatted into its own row. You can see the name, ID, attendance status and other relevant information for each person. To find a specific user or category of information within the grid, begin typing the search term in the search field to filter the rows.

To sort the entire grid, click any column header to sort in ascending or descending order, and click again to reset to default. Each attendee will have their own easy-to-read row. Use the checkboxes on the left to select multiple attendees. After selecting one or more attendees, their credit records can be viewed, modified, or removed. Transcripts for each attendee can be viewed, emailed, or printed as needed.

Attendee Status

There are three status indicators for attendees that will display in the **Status** column. This column can be sorted and searched.

On Roster
This user has been added to the roster for the activity but has no credit of any kind.

Attendance Recorded
This user has a zero (0) credit hour record. Typically given before the evaluation is complete.

Credit Awarded
This user has a full or partial (non-zero) credit hour record.

Adding a User

When adding a user to the roster, click the **Add User** button at the top of the screen. Begin typing a user name into the **Select User** drop-down box to find an existing CloudCME user or fill in the **Create New CloudCME User:** fields to add a new person. Click **Add User to Roster** to add the user, or click **Add User & Record Attendance** to add the user and automatically give them the credit value currently set in the **Activity Options** panel.

Search for Existing User:

Select User ▾

or

Create New CloudCME User:

First Name | Last Name | Select Degr... ▾

Email | Select Profession(s)... ▾

*All fields are required.

⊕ Add User to Roster | ✓ Add User & Record Attendance

Searching and Sorting

Quick Search or column sorting may be used to find specific people, or groups of people in the grid, To sort, click any column heading and the grid will sort in ascending and descending order, click again and the columns will revert back to default.

To search, type almost any information that appears in the grid, and the list will update immediately. Search for names, UserIDs, Professions, or any of the three status types described above. For example, a quick search for "on roster" will display only those users with no credit records. They can then be selected and attendance recorded in one step.

| carpe | 🔍 | | | | |

■ User Details	Status	Credit Details	User Credit Eligibility List	User Professions
☐ **Carpenter, Paul** **Degree:** MD **UserID:** 246794 📖 Transcript	☰		AMA PRA Category 1 Credits™	Physician

Saving Attendance & Credit

To save attendance for a user or group of users, click the checkbox on the left side of each row to select the users to update. Once selected, click the **Save Attendance** or **Save Credits** button to update their status.

✓ Save Attendance | 🖫 Save Credits

| Search... | ✕ |

■ User Details	Status
☑ **Kuhlman, Derek** **Degree:** **UserID:** 267987 📖 Transcript	👤✓

Removing Attendees or Credit

To remove attendance for a user or group of users, use the checkbox on the left side of each row to select the users to update. Once selected, click the **Remove Credits** or **Remove Attendance & Credits** button to update their status or remove them from the roster. There will be a confirmation dialog before these actions are completed.

 Remove the credit record, but leave the user "On Roster"

 Remove the credit record and also remove the user from the roster entirely.