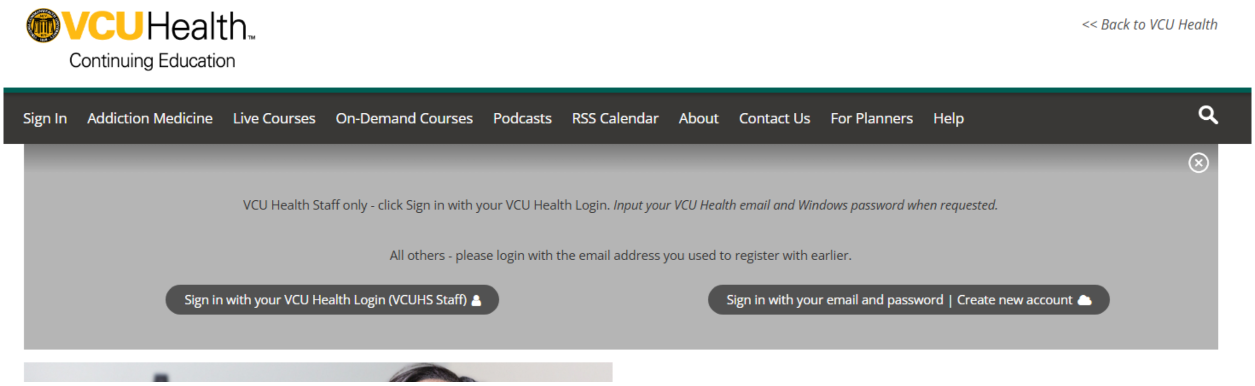
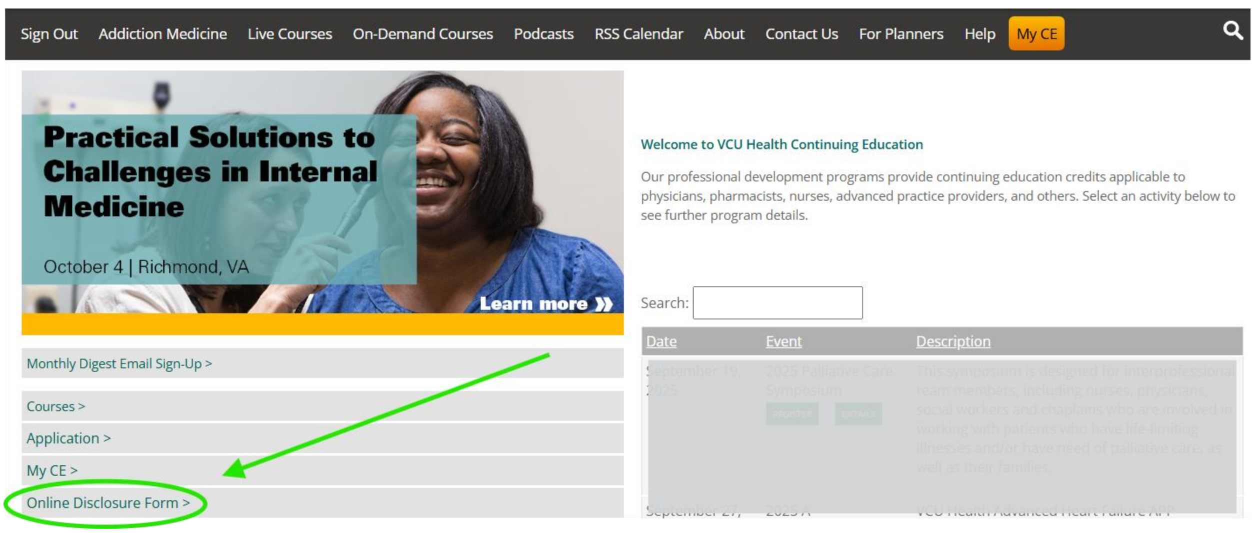
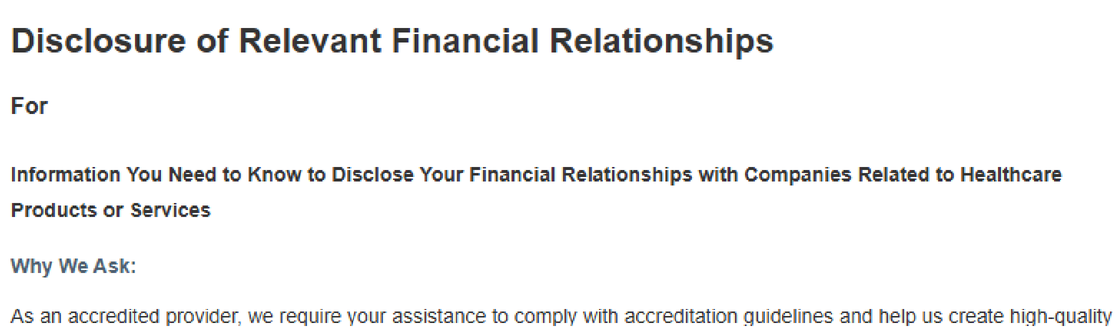
1. Use your Cloud CME credentials to login to vcu.cloud-cme.com



2. On the main page navigate to the “Online Disclosure Form” option which can be found on the fifth line down under the announcements and right above the accreditation statement.



3. Next, please complete the **Disclosure of Relevant Financial Relationships** by answering all questions listed on the form. At the end, be sure to type your full name and the date, then click **Submit**.



Disclosure of Relevant Financial Relationships

For

Information You Need to Know to Disclose Your Financial Relationships with Companies Related to Healthcare Products or Services

Why We Ask:

As an accredited provider, we require your assistance to comply with accreditation guidelines and help us create high-quality

RSS Coordinator FAQ

1. When do I need to initiate a mitigation for an activity?

Mitigation is required when the activity status on the RSS dashboard is marked IN REVIEW This indicates a speaker has disclosed a financial relationship on their disclosure form that has not ended.

2. What is the process for mitigation?

The RSS coordinator must submit:

- A copy of the speaker's presentation
- A completed COI mitigation form, filled out by a **non-conflicted** activity director or planning committee member
  (Note: The reviewer must be listed on the survey.)

3. What are the expectations for maintaining the RSS dashboard?

RSS coordinators are expected to:

- **Check the dashboard daily** and review the status of upcoming sessions.
- **Upload objectives** for each session
- **Add speakers** to the dashboard in a timely manner

4. I added the speaker to the dashboard, but it says, "No Disclosure," even though they say they've completed it. What should I do?

The speaker likely has **duplicate accounts**. Ask them to confirm that all their emails are or have been associated with their profile. Also state which email should serve as the primary login. Then notify the CE office so we can **merge the accounts.**

5. When should I submit materials such as presentations or MOC questions?

- **Presentations for mitigation** should be submitted **at least 2 weeks prior** to the activity.
  Note: Due to the high volume of activities reviewed (70+), late submissions may not be reviewed, and the activity may not be approved for CE credit.
  - If delays are anticipated, **consider replacing the speaker** to avoid jeopardizing credit.
- **MOC questions, answers, rationale, and citations** must be submitted **at least 3 days before** the activity.

6. What is considered an "ineligible company"?

According to ACCME (2025), ineligible companies are those **whose primary business is producing, marketing, selling, re-selling, or distributing healthcare products used by or on patients.** These companies are not eligible to be accredited in the ACCME System.

Coordinators Training Manual for Regularly Scheduled Series (RSS)

March 2023

Table of Contents

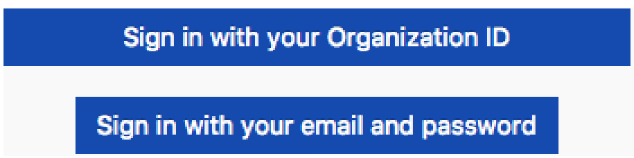
RSS Dashboard Introduction

CloudCME® offers the RSS Dashboard to users who want to easily manage RSS child activities. In the RSS Dashboard, users can view the child status, activity details, presentations and COI status, target audience, comments, and approval status. Users can also edit the activity, manage, and email Planners, Faculty, and Owners/Coordinators, upload and download presentations, override approval and generate flyers.

IMPORTANT NOTE: An Administrator must assign RSS Coordinators permission to use the RSS Dashboard via **Administration > User Screen Access**.

NOTE: If the RSS parent activity is a Case Conference (i.e. - tumor boards, M & M, etc.), and the "**Automatically Approve Case Conferences**" checkbox is checked in **Administration > Preferences > Miscellaneous**, the RSS parent and any child activities generated from the parent, *will be automatically approved*.

1. First, log into CloudCME® by clicking **Sign in with your Organization ID**, entering your email, password and clicking the **Login** button.



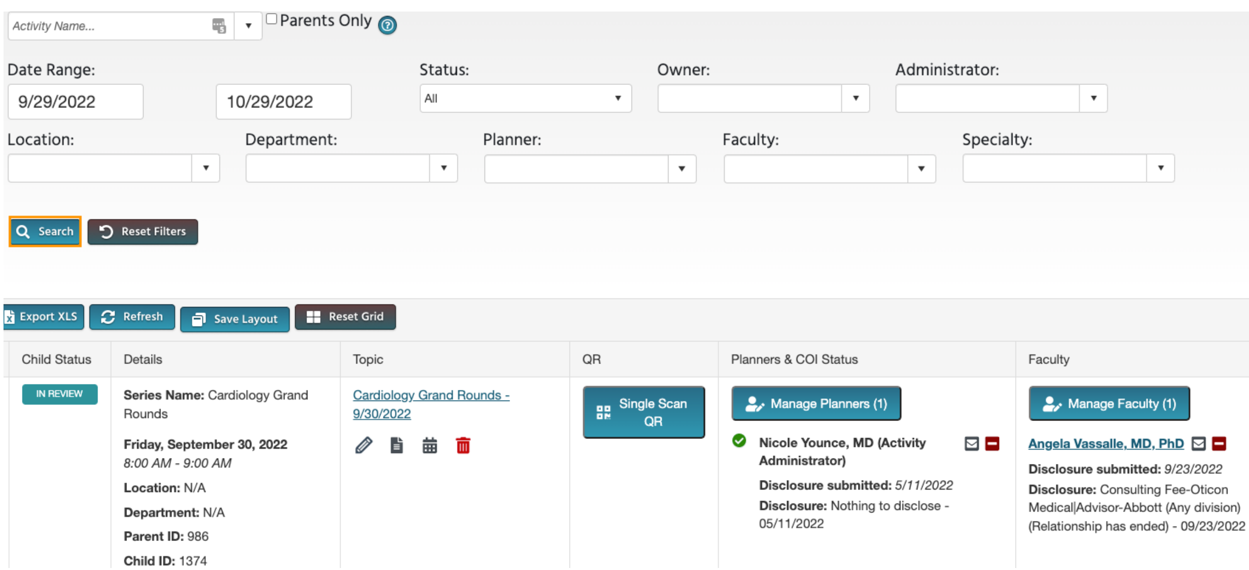
2. At the bottom of the screen, next to the drop-down box, click the **Administration** link.

3. Then, from the Main Menu, go to **Activities > RSS Dashboard**.

NOTE: This screen may vary depending on the user screen access that has been given.

4. The **RSS Dashboard** screen will display.

The RSS Dashboard provides a minimized view to easily manage RSS activities. Coordinators will see all activities that they have been assigned as Coordinator/Owner **except** those that are **Approved** (unless **"Approved"** is selected in the **Status** search).



There are a variety of ways to search the RSS Dashboard. Users can search by the activity name, **Date Range**, **Status, Owner, Administrator, Location, Department, Planner, Faculty** or **Specialty**. Click **Search** to display results in the Dashboard.

RSS Dashboard Columns

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

> **NOTE:** Peer Review no longer triggers child event status changes. Status changes are now driven by the COI Mitigation Manager screen.

<u>The following columns are included in the RSS Dashboard:</u>

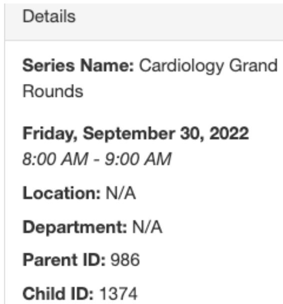
1. **Child Status** - As the RSS child activity goes through the approval process, this column will continuously update the status to **Incomplete**, **Pending**, **Approved**, **Rejected** or I**n Review**.

In Review - This status displays if faculty have been added with a completed disclosure and at least one financial relationship has been declared, triggering a COI Mitigation process needed. If one faculty member is rejected, and other faculty have been approved, the **Child Status** will remain **In Review**.

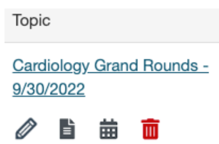
A **Review Disclosures** indicator will display in the **Status** column if a user has submitted a new Disclosure prior to the activity starting. There may be a new potential COI relationship that needs to be reviewed. Once the COI status has been addressed, the RSS status icon will update to the proper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

Faculty Added After Approval - This indicator will appear in the **Status** column to notify Administrators that faculty members have been added to an activity after it has been approved. The status will automatically revert back to IN REVIEW.

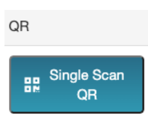
2. **Details** - This column will display the **Series Name**, the date and time of the child activity, **Location**, **Department**, **Parent ID** and **Child ID**.



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



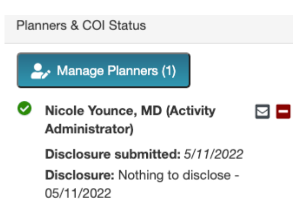
3. **QR** - Single Scan QR is used for recording attendance by users logged in to the CloudCME® mobile app.



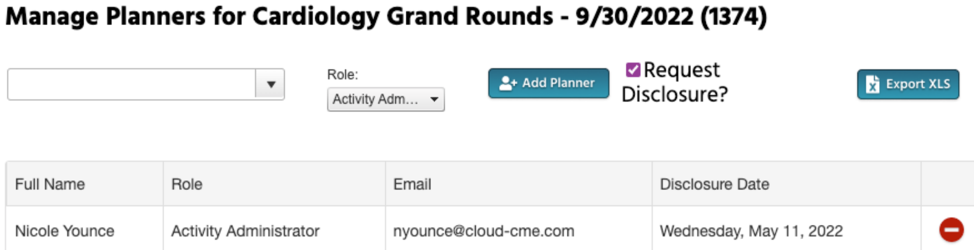
5. **Planners & COI Status** - This column displays the Planners associated with the child activity, **Disclosure** and **Disclosure Submitted** date, and the current COI status. If more than 3 Planners are assigned to the child activity, there will be a "**View All**" link that when clicked, will expand to show all assigned Planners or roll up the listing view.

   NOTE: If you do not see the Planners & COI Status column, then your organization opted not to use it.

   - Clicking the **Manage Planners** button will display a pop-up screen that allows RSS Coordinators to view, add or remove Planners, add or change Planners roles, and export planning committee member information.



- To add a Planner to the activity, type and select the planning committee member's name in the drop-down box. Click the **Add Planner** button. The new member will be added to the activity and the planning committee member's information will display in the Planners table.

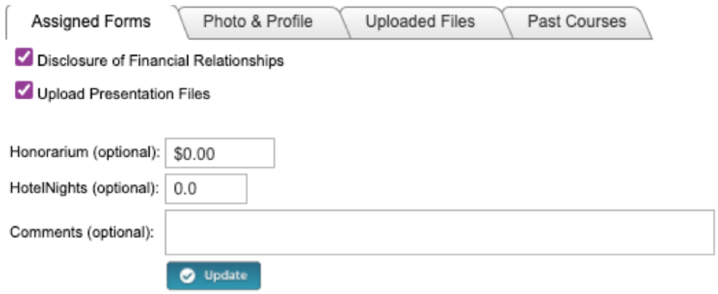


6. **Faculty** - This column displays Faculty assigned to the RSS child activity. The Disclosure status will display beneath each faculty name along with their Disclosure submission date. If more than 3 faculty members are assigned to the child activity, there will be a "**View All**" link that when clicked, will expand to show all assigned Faculty, or roll up the listing view.

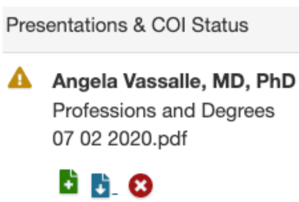
- Clicking the **Manage Faculty** button will display a pop-up screen that allows RSS Coordinators to email, view, add or remove Faculty, request disclosures and file uploads, and export faculty member information.

- To add a faculty member to the activity, type and select the member's name in the drop-down box. 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.

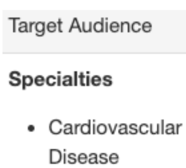
- Click the faculty member's name to request Disclosures, presentation files and other optional information, edit a member's profile, and view uploaded files and past courses.



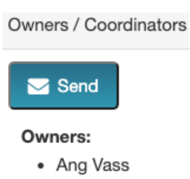
7. **Presentation & COI Status** - This column displays a faculty members' status, COI status, as well as icons to **Upload**, **Download** and **Remove** a faculty presentation. To upload a presentation, click the **Upload** icon, complete the Attestation, and select the file that will be uploaded. Once a file has been uploaded, the download and delete icons will display.



8. **Target Audience** - This column displays the **Specialties** and **Professions** that were selected during the parent activity setup. These can be revised on the **RSS Activity Editor** when the **Pencil** icon is selected.



9. **Owners/Coordinators** - This column displays the child activity Owners' and/or Coordinators' names as well as the option to send emails.



RSS Icons and Status Definitions

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, a user can edit the child activity information.

2. **RSS Flyer** - The system will generate an RSS flyer for distribution. Faculty must be assigned to the activity before a flyer can be generated. The flyer template can also be customized for a unique RSS child or parent activity. The template can be applied to all child activities of the parent.

- To associate the revised flyer to the RSS parent for use per each child activity of the parent, click the **Upload Flyer** button, select the revised flyer from your desktop, and check the **Use flyer/template for Parent?** checkbox.

NOTE: The RSS flyer will be saved in the **Documents** tab in **Activity Manager** for the RSS activity.

3. **Calendar** - Click this icon to view and edit scheduled RSS child activities.

4. **Trash** - Click this icon to deactivate/delete an RSS child activity. A pop-up window will display to confirmation deletion.

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

1. **Incomplete** - This status represents Faculty where there is no disclosure on file, or their disclosure on file has expired. RSS Coordinators/Owners will see **Incomplete** by default until Faculty are assigned and disclosures have been completed.

2. **Pending** - This status represents Faculty whose disclosure and presentation are currently undergoing the COI Mitigation process. The system will send an email to the Administrator and Owner, containing all RSS child activities in which the activity status has been changed to **Pending**.

3. **Disclosure Updated** - This icon will display if a user has submitted a new disclosure 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 represents Faculty who have completed a disclosure, no financial relationships have been declared or, if identified, COI mitigation has been satisfactorily completed. The **Approved** status will also display if an Administrator or Activity Administrator conducts an Approval Override or if in **Administration > Preferences > COI Resolution** the "**Automatically Approve COI When Users Have Nothing to Disclose**" checkbox is checked.

5. **Rejected** - This represents Faculty who have completed a disclosure, at least one financial relationship has been declared, and the conflict is deemed immitigable.

The child activity status is then updated to **Rejected**. The Coordinator will remove this faculty member, select a **new** faculty member, and begin the process again.

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

6. **Download** - Download a faculty member's presentation file.

8. **Delete** - Delete a faculty member's presentation file.

<u>The following icons (1,2) can be found in the **Faculty** and **Planner** columns:</u>

1. **Email:** Draft and send an email to the selected Faculty Member/Planner.

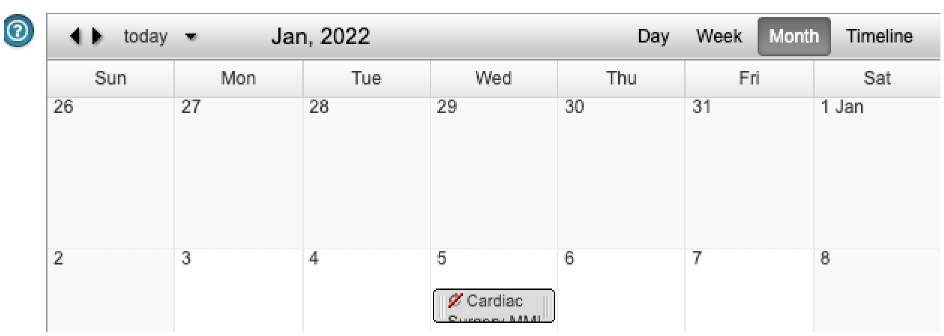
2. **Remove:** Remove a Faculty Member/Planner from the RSS child activity.

<u>The following button can be found in the **Owners/Coordinators** column:</u>

1. Send Draft and send an email to Owners/Coordinators.

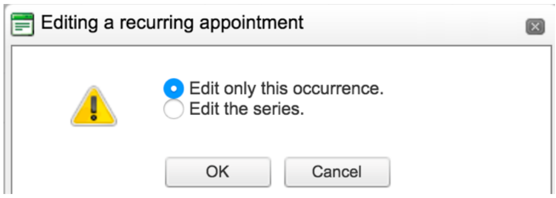
Using the RSS Dashboard

Click the calendar icon () in the **Topic** column to display a pop-up window that will show a calendar with the reoccurrence dates of the child activities. To change the date of a child activity, users can drag and drop the child activity to a new day.

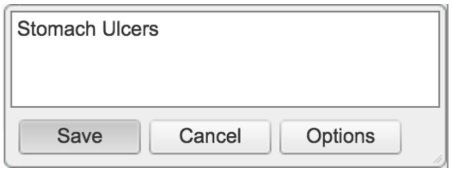


To edit a child activity, double-click on the activity in the calendar. A pop-up window will display. The radio button will default to **Edit only this occurrence**.

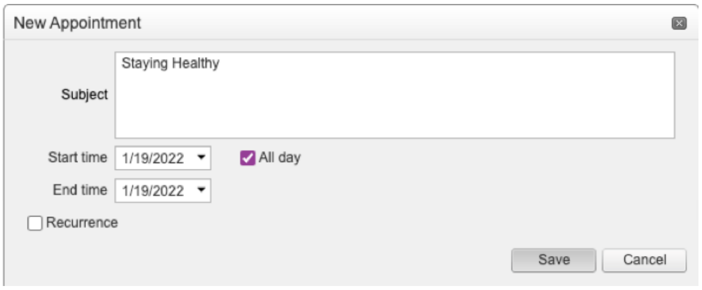
This option will only edit the child activity that was selected. To edit the entire series of child activities, select the **Edit the series** radio button. Click **OK**.



To edit the title of the child activity, type the new title into the textbox that will display. To revise the date or time the activity will occur, click the **Options** button.



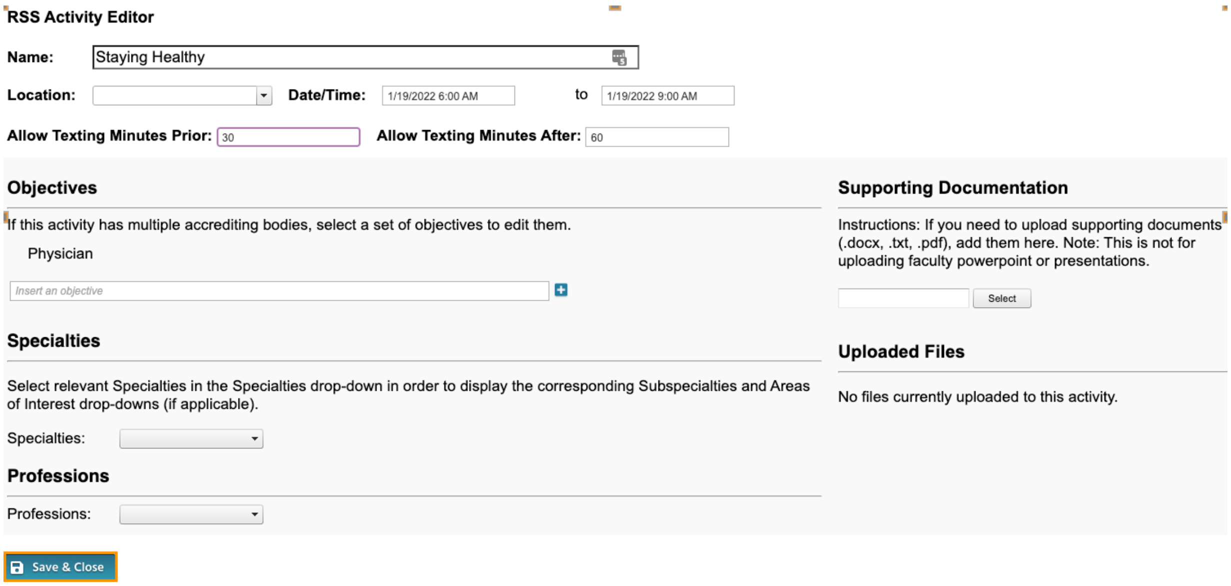
A new window will display. Here, users can create a child activity by filling in the text box, selecting the date and time the child activity will occur, and whether the activity have a recurrence.



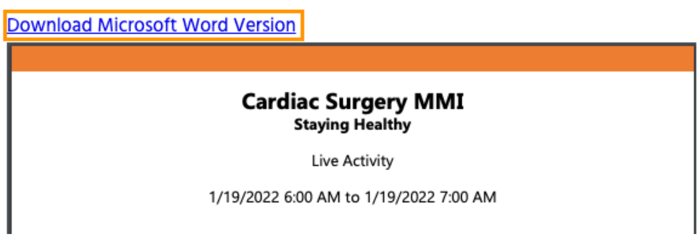
Click the **Pencil** icon from the RSS Dashboard activity with the updated title. This icon can be found in the **Topic** column. The **RSS Activity Editor** screen will display. Here, users can edit and/or add additional information and upload supporting documentation for the child activity.

> **NOTE:** The child activity title will display on users' transcripts.

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



To customize the RSS flyer, click the **RSS Flyer** icon ( ) and then click the **Download Microsoft Word Version** link. The flyer will open as a Word document. Make the desired changes and click **Save**.



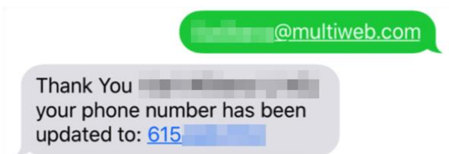
To associate the revised flyer to the RSS parent for use per each child activity of the parent, click the **Upload Flyer** button, select the revised flyer from your desktop, and check the **Use flyer/templates for Parent?** checkbox. Then, click the **Save** button.

SMS Texting

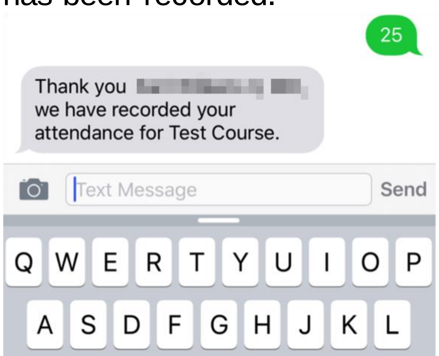
These instructions are intended only for users that have an active account in CloudCME®. Attendance can only be recorded {X minutes prior to the meeting, during the activity, or X minutes after the meeting}.

Step 1: First, users must pair their mobile phone to their account in CloudCME®. Text the email address associated with this account to, {Enter your organization's local exchange number}. A message will be sent that looks like the one below, confirming that the phone number has been updated.

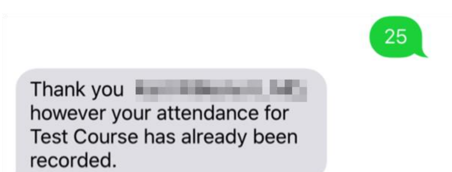
NOTE: This is a one-time operation.



Step 2: To record attendance to an activity, text the activity ID or code that has been provided for the activity[1]. A message will be sent that verifies that activity attendance has been recorded.

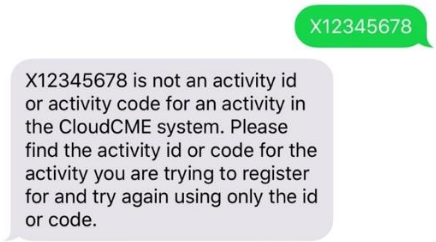


NOTE: Attendance can only be recorded once to an activity. If a user tries to record attendance an additional time, they will receive the following message:



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

If a user attempts to use an activity code that does not exist, they will receive the following message:



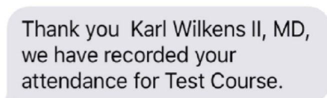
Attendance, Evaluation & Certificate Instructions

Follow the instructions below to complete the program evaluation and claim your credits and certificate of participation. You are able to log back into the system to download past participation certificates and/or transcripts as well. Contact VCU Health Continuing Education if you have any problems at (804) 828-3640 or ceinfo@vcuhealth.org.

Submit Attendance

1. Record attendance via text message by texting your email address used when registering for the event to (804) 625-4041. You will receive a confirmation message stating that your cell phone number has been updated in your profile. ***Note: You must have an account setup at https://ce.vcuhealth.org before you can submit attendance.***

2. Text the course code to the same number (804) 625-4041. The course code will be provided at the beginning and end of each session. You will receive a confirmation text that your attendance has been recorded.



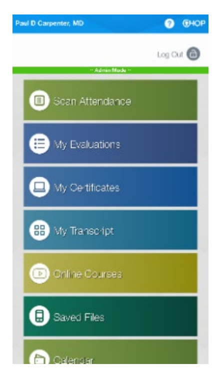
   a. **NEW TEXT ATTENDANCE TIME FRAME: Unless otherwise instructed, text attendance for live activities must be submitted no more than 30 minutes before the start of the activity and no more than 48 hours after the end of the activity. Text attendance codes expire 48 hours post activity.**

Complete Evaluation & Claim Credit

After recording attendance, you must evaluate the activity and claim credit. This can be done on a computer or via the CloudCME App. *Please see separate instructions to download and set up the app.*

In order to receive credit, evaluations must be completed within 30 days of completing a live activity.

Access through the Attendee Portal (computer)



1. Go to https://ce.vcuhealth.org and select **Sign In** from the menu.
2. Sign-in using the email address used to register for the event.
3. Once signed in, click the “My CME” or “My CE” button
4. Click on **Evaluations and Certificates** to view evaluations that need to be completed for activities you have attended. This also allows you to view, print or email certificates for activities you have already completed an evaluation for.

Access through the App (smart phone or tablet)

1. Open the CloudCME app on your device (Organization code: VCU)
2. Click **My Evaluations** in the menu
3. Click the name of the activity to access and complete the evaluation
4. Click **My Certificates** to view, email or save a copy of the certificate.

VCU Health Continuing Education

VCU Health Continuing Education
PO Box 980048, Richmond, VA 23298-0048
(804) 828-3640 | ceinfo@vcuhealth.org | ce.vcuhealth.org

Disclosure of Faculty Conflict of Interest

VCU Health Continuing Education adheres to the ACCME's Standards for Integrity and Independence in Accredited Continuing Education. Any individuals in a position to control the content of a continuing education activity, including faculty, planners, reviewers or others are required to disclose all relevant financial relationships with ineligible entities (commercial interests). All relevant conflicts of interest have been mitigated by non-conflicted planners prior to the commencement of the activity.

All VCU and VCU Health reviewers have nothing to disclose.

The following Planning Committee and/or Presenting Faculty Members disclose the following relevant financial relationships:

Name	Title	Relationship Type	Name of Company	Nothing to Disclose [x]

VCU Health
Continuing Education

Claiming Credit

Submit Attendance

1. *If you have **not participated in a VCU Health CE program** in the past:*
   - Go to vcu.cloud-cme.com to create an account – make sure to add your cell phone number

2. If you **have participated before:**
   - Text the course code to (804) 625-4041.
     The course code for this event is: **(Include 5-digit Child ID#)**

Complete Evaluation & Claim Credit

1. Go to https://vcu.cloud-cme.com	OR	Open the CloudCME app on device
2. Sign in using email address used above		Click “My Evaluations”
3. Click “My CE” → Click “Evaluations and Certificates		Click the name of the activity → Click “Evaluations and Certificates”
4. Complete evaluation		Complete Evaluation

VCUHealth
Continuing Education

Mitigation of Conflict of Interest (COI) Form

To be completed by a Non-Conflicted Activity Director, Planning Committee Member, CE Staff, or Non-Conflicted Appointee.

Name of Person with Conflict:		**Activity Date:**	
Activity Title:			
Individual's Role:	☐ Academic Planner /Planning Committee	☐ Speaker/Case Presenter/Author	☐ Moderator (without content)

<u>**Conflicts of Interest**</u>

What is a conflict of interest?

VCU Health Continuing Education considers financial and non-financial relationships to create actual conflicts of interest in CE when individuals have both a relationship with an ineligible company and the opportunity to affect the content of CE about the products or services of that company. An ineligible company is one whose primary business is producing, marketing, selling, re-selling, or distributing health care products used by or on patients.

Where is the conflict?

When the provider's interests are aligned with those of an ineligible company, the interests of the provider are in "conflict" with the interests of the public. The interests of the people controlling CE must always be aligned with what is in the best interests of the public.

How do these circumstances create a conflict of interest?

The potential for increasing the value of the relationship with the ineligible company creates an incentive to influence the content of the CE – an incentive to insert commercial bias. Commercial bias is prohibited in CE.

Mitigating COIs for Individuals in their Role as Planning Committee Members

<u>Select all that apply:</u>

☐ The above named individual recused him/herself from planning content in the conflicted area.
☐ The individual divested him/herself of the financial relationship with the ineligible company.
☐ A peer review will be performed to mitigate potential COI.
☐ The individual's role will be limited to aspects not related to the declared conflict.
☐ The individual will be paired with a non-conflicted individual to ensure commercial bias is not present.
☐ All aspects related to the individual's role will be reviewed by the appropriate CE review committee.
☐ The individual's conflict has been deemed immitigable, and they will be considered ineligible to plan, present, author, or review any aspect of this activity.

Mitigating COIs for individuals who are moderators.

☐ The individual named above will only serve as a moderator and has no involvement with content for this activity.

Mitigating COIs for Individuals in their Role as Speakers/Authors

Select one or more of the following options:

☐ The individual divested him/herself of the financial relationship with the ineligible company.

☐ A peer review will be performed to mitigate potential COI.

☐ The individual’s role will be limited to aspects not related to the declared conflict.

☐ The individual has been instructed to refrain from making recommendations on topics in which the conflict(s) exist(s).

☐ The individual has been instructed to base all recommendations on peer-reviewed data (this must be paired with another mitigation method).

☐ The individual was instructed to limit presentation content to data and information while other presenters addressed the implications and made recommendations.

☐ The individual was instructed to limit the sources for recommendations to those identified by the Course Director (e.g. summaries from the systematic reviews of the Cochrane Collaboration, summaries from the AHRQ Effective Health Care Program, etc.).

☐ The individual's conflict has been deemed immitigable, and they will be considered ineligible to plan, present, author, or review any aspect of this activity.

CERTIFICATION: I certify that the information I have provided is true and complete to the best of my knowledge. I understand that it is a requirement of VCU Health Continuing Education to provide documentation of COI resolution prior to the CE activity. **If I am the Activity Director I also certify that the content validation for all presentations has been assured.**

Name of Person Completing this form: Date of Form Completion

Select your role in this activity:

☐ CE Staff Member ☐ Non-conflicted Activity Director

☐ Peer-Reviewer ☐ Non-conflicted Planning Committee Member