Training Manual for Course Coordinators

Updated June 2025

https://vumc.cloud-cme.com

Questions not covered in this manual?

Contact OCPD at cme@vumc.org

Overview of Responsibilities

The **CME Associate** is responsible for ensuring that the following tasks are completed for each course:
- Speakers entered no later than 30 business days prior to the course start date
- If updates are required to the presentation, the updated presentation must be sent to OCPD no later than 5 business days prior to the course start date.
- The final agenda is submitted no later than 10 days prior to the activity start date
- All promotional materials are submitted for review to the OCPD prior to making public
- Letter of Agreement for Commercial Support completed and signed before accepting any funding (If Applicable)
- Announcement sheets with faculty and planner disclosure information are available to participants prior to the activity
- Track receipt of grant funding, honorarium payments, and other expenses on an academic year basis

The **Activity Director** is responsible for ensuring that the following tasks are completed for each course:
- Be present during the entire live activity
- Ensure the Standards for Integrity and Independence are followed (see separate policy)
- No product-promotion or product-specific advertisements are juxtaposed with educational materials and if this occurs immediately correcting this during the live course
- The purpose/objectives of the live activity are communicated to the learners
- Will encourage all participants to complete the post-activity evaluation and encourage all participants to text in the CME code which also tracks attendance

Deadlines and Disclosure Forms

The deadlines below are necessary for our CPD Office to efficiently manage all CME approved activities each calendar year. Applications for Courses are completed yearly **no later than 120 days from the activity start date**. The application can be found at **https://vumc.cloud-cme.com/application**.

All Faculty (Activity Directors, Speakers, Moderators, etc.), Planners, and CME Associates are required to have a disclosure form on file in CloudCME. The form must be less than 12 months old and updated whenever it either expires or when a potential conflict of interest changes. Each person must complete and sign their own disclosure form. To complete the form, log in at **https://vumc.cloud-cme.com** and select *Disclosure Form* from the bottom.

- All disclosure forms for the activity must be submitted through CloudCME
  no later than 21 business days prior to the course date.
- If the CPD Office requests speaker presentations, they must be submitted
  no later than 14 business days prior to the course date.
- Final Agendas are due **10 business days** prior to the course start date.

Getting Started

Before you begin for the first time, make sure your CloudCME profile is correct and complete:
- Launch Google Chrome (rather than Internet Explorer, Safari, or Firefox) and go to
  https://vumc.cloud-cme.com
- Click *Sign In* then choose *VUMC Faculty and Staff*
- Select *MyCE* then *Profile* and confirm all information is correct and complete
  - o Any missing required information will be highlighted in red, feel free to skip non-required fields
- *Submit* at the bottom of the page to save

The Basics

1. To access data about your course, click the word *Administration* in the lower left corner
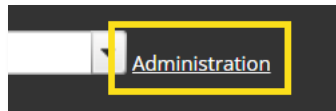
2. An **administrative menu** will appear on the left side of the screen. (For this and all screens, please give the system time to load the page.)
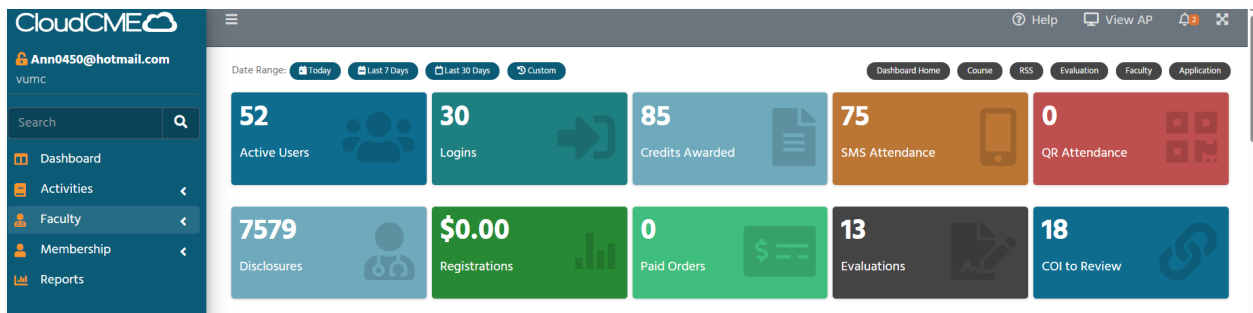
3. To view the status of disclosures for your course faculty click *Faculty* then *Faculty Management*. A blank field will appear. Begin entering the title of your course; based on what you enter the system will populate the field or give you a selection of titles from which to choose.
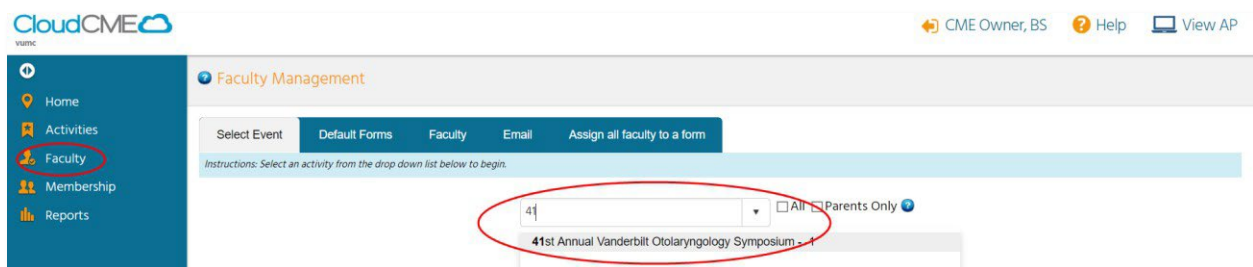
The Basics (continued)

After selecting your course, from the page that appears, you may:
- Add faculty (speakers, panelists, moderators, etc.)
- Export the report to Excel
- Sort or filter the list by any of the headings in the blue bar
- View the status of a faculty disclosure form

4. To view a variety of reports, click *Reports*.

You must enter the title or texting code of a course to generate a report. Begin entering the title or the full texting code of your course. Based on what you enter the system will populate the field or give you a selection of titles from which to choose.

The Basics (continued)

To see attendance for a course click *Reports* then *Credits*.
- Check the dates
- Enter the course title or texting code
- Click *Run Report*
- Sort the data by clicking on any field heading
- The report you generate may be exported to Excel
- To see data on a specific user, enter the name of a specific user in the User field, then click *Run Report*

NOTE: The Disclosure option on the Reports page will generate a PDF for a selected speaker (if an individual's name is entered) or all speakers for an Activity (if an activity title is entered). **Use this option judiciously!** The better option is to use the Faculty menu (see 4 above).

5. **To exit the system**, click your name in the upper left of the screen.

Assisting Learners

SMS Texting for Attendance

These instructions assume that your users have an active account in CloudCME. If they do not have an account, instruct them to click *Sign In* then the appropriate VUMC or non-VUMC button to begin a profile.

**Learners must pair their mobile device with their profile (one time).**
First, a learner must pair their mobile phone to the account. They should text their email address, exactly as it appears in their profile to 855-776-6263. They will receive a message that looks like the one below.
This is a one-time operation.
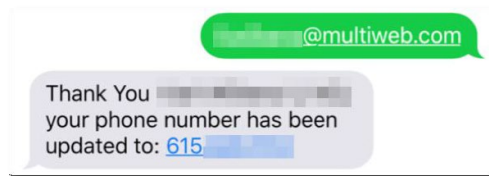
Text an Activity ID to the system
To record attendance for an activity, learners text the activity ID that has been provided to 855-776-6263. Learners will receive a message back that verifies activity attendance has been recorded.
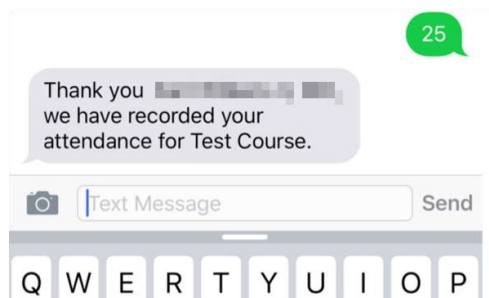
NOTE: Learners can only record attendance once for an activity. If they try to record attendance an additional time, they will receive the following message:
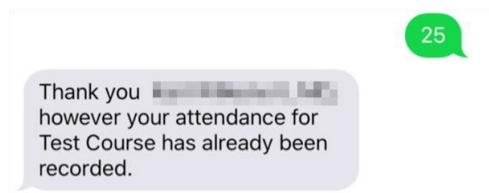
Credit awarding is instant, and users can log in to the attendee portal, click the *My CE* button, then select *Transcripts*, and view the activity, credit, and date on their transcript. They can download or email that transcript to anyone themselves.

Assisting Learners (continued)

Evaluations

Evaluations are required for all courses to download a certificate. To find the evaluation attendees must login to **https://vumc.cloud-cme.com**, go to *My CE*, *Evaluations and Certificates*.

Advertising your Course

All brochures, websites, flyers and save-the-dates require that specific ACCME statements be included. Please forward all information to your contact in the OCPD office for approval before sending out or posting information about your course.

Closing Out your Course

All live courses require a final budget submission within 45 days of the activity end date.

Exhibits

To comply with VUMC Policy 40269, VUMC personnel shall follow the below procedures in regard to Exhibits:

- CME Associate or Activity Director notifies OCPD of interest in requesting Exhibits when they complete the activity application in Cloud-CME.
- CME Associate sends requests to Exhibit to potential Exhibitors.
- CME Associate sends the complete list of Exhibitors to the CME Program Manager for OCPD approval at least 5 business days prior to the start date of the accredited educational activity.
- An agreement to Exhibit at a CME Activity must be signed by the exhibitor and submitted to the OCPD CME Program Manager at least 5 business days before the start date of the accredited educational activity.
- All Exhibits, ads, or promotion must be kept separate from the CME activity.
- The CME Activity Director and/or CME Associate must produce accurate documentation detailing the receipt and use of Exhibit funds. This must be included in the budget that the CME Activity Director and/or CME Associate submits to OCPD.

Commercial Support

For All VUMC CME activities that accept Commercial Support (defined as financial or in-kind support from ineligible companies), the Office for Continuous Professional Development (OCPD) ensures that the education remains independent of the ineligible company and that the support does not result in commercial bias or commercial influence in the education.

Assisting Learners (continued)

Commercial Support (continued)

Commercial support does not establish a financial relationship between the ineligible company and planners, faculty, and others in control of the education content. All commercial support management is overseen by the VUMC Office for Continuous Professional Development: commsupp@vumc.org.

Unless otherwise stated herein, the defined terms in this SOP are defined in VUMC Policy Number 40269:

- The final activity brochure with a listing of all Commercial Support will be sent via email to the Activity Director and CME Associate 3-5 Business days prior to the activity start date:

  o The Activity Director must attest that no additional changes will be made to Commercial Support and/or faculty upon receipt of the final activity brochure 1 business day prior to the start of the activity. **Completion of this attestation is a requirement for accreditation of your activity**.

  o The final information in this brochure must be made available to all participants in the educational activity prior to the start of the activity.

- An ineligible company may not make direct payments to a joint provider, faculty, or others involved with the CME activity.
- Social events and meals should be modest and must not compete with or take precedence over educational events.
- VUMC OCPD will not use Commercial Support funds to pay for travel, lodging, honoraria, or personal expenses for non-teacher or non-author participants of a CME activity.
- VUMC OCPD may use Commercial Support to pay for travel, lodging, honoraria, or personal expenses for bona fide employees and volunteers of the provider, joint provider, or educational partner.
- A budget must be provided no later than 60 days after the conclusion of the CME activity detailing the amount of Commercial Support funding received and the commercial interests providing the funds and all CME activity related expenses.