



Cloud CME Sidra Admin Training

## **CPD** Office

# What is Cloud CME?

Cloud CME is a one-stop-shop solution for all accredited CPD activities at Sidra.

The features include:

CPD Application Form for accreditation Access for teaching faculty – disclosures, conflict of interest resolution Educational Rounds – RSS Dashboard – for Administrators Financials – income and expenses auto-populated to accreditation bodies Participants – registration, evaluations, certificates – Mobile App from the App Store Forms – pre-built electronic and customized templates Attendee Portal – reporting attendance to generate credits for activities –auto-populated for the accreditation body Commercial Support – electronic form to declare financial and in-kind support





### Internal and External User Access. All users please Sign In to register. https://sidra.cloud-cme.com/default.aspx

Conferences & Symposia Rounds Workshops About Sidra Contact Sign In



### Welcome

Sidra Medicine is a premier women and children's hospital with a commitment to lifelong learning and excellence in healthcare. The continuing professional development program fosters the ongoing educational needs of the culturally diverse, interprofessional healthcare team by improving knowledge, competence and performance based on the latest evidence; this translates into exceptional healthcare quality and patient outcomes.

### Learners My Account/Transcripts New User

If you do not have an account with us, please click the button below to create one.



Speaker/Presenter

Complete Disclosures Claim Speaker Credit Policies and Resources << Back to Sidra Medicine

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# Planning to accredit a new activity

# NEW APPLICATION is a separate URL for each activity that will be sent out to each activity owner at the first meeting with the CPD Office.

- 1. An educator has documented a service gap. CPD is required.
- 2. A Scientific Planning Committee is made up of the target audience.
- 3. At least 2 planning meetings are held, Minutes are recorded.
- 4. The following documents are created: Minutes of the first and last planning committee, the program brochure, the needs assessment and the content review checklist.
- 5. Contact <u>cpd@sidra.org</u> for an appointment.
- 6. The applicant will be provided with their own link to their application, they will be the owner.
- 7. Activity owners will need to submit an activity at least 2 months before the first activity date.
- 8. Activity owners will be kept informed of the progress of their application via Cloud CME emails.



# ACCREDITATION STANDARDS on Cloud CME

On Cloud CME the accreditation guidelines have been enforced.

- Submit a new application at least 8 weeks prior to the start date.
- Automated Email notifications and reminders to planners, admin, faculty.
- Electronic approval process with comments for applicants.
- Applications will be APPROVED or REJECTED.
- Disclosures must be submitted prior to the activity. Allow a minimum of 2 weeks for COI resolution. Allow a minimum of 1 week without COI.
- Reviewers will conclude their application reviews within 1 week.
- Coordinators will upload attendees to their sessions.
- Attendees will receive email notifications to complete their evaluations.
- Certificates will be issued automatically when evaluations are complete.



# **Cloud CME – 2 types of access**

### **Applicant Access**

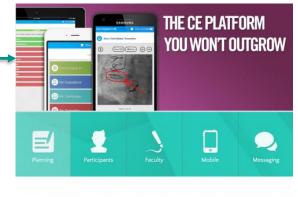
The Application Form is available only as a specific link for each activity. Once the Activity has been created following an interview with the CPD Office you will then be sent the link. Applications are assigned to specific owners. You will only be able to access your own applications. The application form is a separate URL for each activity.

### **Admin Access**

**Coordinators/owners will be nominated by their Division Chief** who will receive the login rights to administer activities. It is a privilege to work on Cloud CME and it means admin staff is **accountable under the Division Chief.** Only trained coordinators are granted access.

**The Division Chief nominates admin staff responsible for budgets and payments**; e.g. registration fees are non-refundable.

**Links and passwords cannot be shared with anyone.** The admin side is sensitive because errors will be passed on to our accreditation bodies.



CloudCME

The **Attendee Portal** is accessible via the free CloudCME App. Screenshot 1

and

on the CloudCME website under the "**My CE**" button. Please log in to view your profile, transcript, evaluations, certificates etc.



# **CloudCME** separate roles and responsibilities for...

Administrators – CPD Office Oversight and Coordination, Calendar of Events Applicants/Activity Owners – creating new applications, submitting documentation

Application Reviewers – providing advice and guidance – approve/reject Peer Reviewers – resolving Conflicts of Interest (COI)

Faculty – speakers (moderators) – uploading biographies, disclosures,

evaluations, presentations, audience response system

Activity Coordinators for RSS– adding new sessions, recording attendance, awarding credit hours, creating an agenda,



# **Basic Rules**

- 1. User ID and passwords cannot be shared with anyone
- 2. Cloud CME access is a privilege for trained admin staff across Sidra
- 3. All information must be correct and verified at the point of data entry
- 4. Only accredited activities and dates will be supported and approved
- 5. Data will be auto-filtered and reported directly to accreditation authorities
- 6. All users are held accountable via their department chief
- 7. Electronic privileges may be withdrawn by the CPD Office and require admin staff to submit data manually
- 8. Cloud CME forces admin to submit documentation and will not allow an activity to be conducted if disclosures are outstanding or not resolved



# Glossary

RSS – <u>Regularly Scheduled Series</u> – OR – Educational Round (and workshops/simulation)
 RSS Owners – will be assigned to one or more activities and can see approved activities only
 RSS Dashboard – provides an overview of all activities assigned to you

**RSS dashboard** – 15 columns – includes the status of an activity (incomplete, pending, in review, approved, rejected) and some show icons.

RSS Icons: calendar, trash, green plus, envelope, red minus, disclosure, upload presentation. **Parent Activity** (e.g. Sidra Grand Rounds – 1<sup>st</sup> accredited session) – Parent ID # **Child Activities** are related to a parent (Sidra Grand Rounds – all other sessions) – Child ID# **Calendar** – auto-generate child activities – remove unaccredited/add accredited dates **Calendar** – click to add dates – they will be added US style: MM/DD/YEAR – CAREFUL **COI** – **Conflict of Interest** – require peer review and resolution prior to the event **Peer Reviewer** – resolves a conflict of interest – the CPD Committee **Filter** – a tool to search the database for specific information

# **Activity Owner**

Working with the RSS Dashboard for **future/upcoming** events – Refer to RSS User Guide

- 1. Auto-generate 'child' activities only of QCHP approved dates the CPD Office will approve the dates also individually
- 2. Create evaluations required so a certificate can be issued
- 3. Generate a session flyer only add learning outcomes you can download the Word flyer and modify it, save it and use it to send out to your audience
- RSS dashboard RED HAND something is missing that you need to add. You
  must add learning outcomes, faculty (presenters), and disclosures for each activity
  to meet accreditation standards.

### IN ACTIVITY MANAGER

- 1. Adding a topic: Go to ACTIVITY MANAGER click the tab Credits & Sessions enter the topic – but not more than 10-12 words
- 2. NEVER deactivate an activity it will remove all the sessions and data



# **Recording Attendance**

First in **RSS Dashboard**, make sure that the activity title and the date are correct, if not you will have wrong dates on certificates. Check that all your dates are accredited.

The information in the date picker window does not update when you move from one date to another. Use the AMERICAN date format – Month/DD/Year.

### Select the Activities tab – Record attendance.

1. Select the activity AND the correct attendance date. Always look for the activity name and the date to record your attendance against. Always use this format, for example look up:

### Sidra Grand Rounds – November 13, 2019. NEVER remove the activity title and the date.

2. Check that the credits are correct. Round up to the nearest quarter for QCHP, round down to the nearest decimal point for Joint Accreditation. Adjust time for each participant. Do not record less than 60 minutes for Joint Accreditation. You can auto-award the credits.



# **3 Ways to Record Attendance**

- 1. Record attendance by finding your activity and date import the participants.
- 2. You can record attendance by generating a QR code. Participants use their mobile app, click scan attendance, and once they have scanned their attendance will be saved. All participants must be registered and have a profile on the cloud. It will generate an attendance sheet of everyone who attended. You can flash up the QR code in the middle of the session and must be scanned at that time. YOU NEED TO ENSURE THE TIME IS CORRECT! IT WILL NOT REGISTER ATTENDANCE IF THE TIME IS WRONG.
- 3. You can record attendance by uploading an excel spreadsheet that has been formulated for Cloud CME.
- 4. Follow the QCHP rounding rules. Record partial or full credits.





# **Recording Attendance**

- 1. Look up and add existing user. Each user has a profile with credits that they are allowed to claim. The activity credits are visible on the left side of the screen. The times can be adjusted for each participant as you add them. Round up for QCHP or round down for Joint Accreditation and remove any credits from Joint Accreditation that are less than the full 60 minutes.
- 2. Tick auto-award credits. Check that credit hours and credits are correct.
- 3. Add all your participants and **SAVE** attendance. **WAIT** until the **SAVE** window appears.
- 4. Attendee names are saved and appear when you add more sessions, just tick them on the right hand side or add more on the left SAVE and WAIT for the SAVE window to appear. The color changes to dark and it will add a line for each participant's credit separately. That is normal. A nurse might receive QCHP Cat 1, ANCC and IPCE credit for an activity.
- 5. If the activity has been set up with an evaluation then an email will go the attendee to complete the evaluation 2 days after the session. Two reminders will be sent within one week.
- 6. All attendees will have an automatically updated transcript. Once evaluations have been completed then the certificate will be electronically issued.
- 7. Transcripts and certificates can be saved, printed and uploaded to the QCHP.
- Attendees must have registered and need to download the Cloud CME app on their Sidra Medicine smartphone.

# **DATE ERRORS ON CERTIFICATES**

### Working with the RSS Dashboard

- 1. Use the DATE PICKER in the Dashboard to move around and add dates.
- 2. When you double click you need to ensure that the activity title and date is correct. There have been many errors, moving around fields does not correct the text or change the previous date.
- 3. All RSS children need to have the activity title and the date recorded like this: Sidra Grand Rounds – April 23, 2020 – even if you assign a session topic, the activity title needs to remain the same when you enter the attendance. DATE PICKER: Do not use any other way to write this. Be aware that we are using the American date format. Month/DD/YY – e.g. Sidra Grand Rounds - December 24, 2020 Pathology Weekly Case Updates: Microbiology – January 3, 2020
- 4. Wrong date was recorded against attendance: In Record Attendance remove all credits from everyone and then go to RSS Dashboard to ensure the date and title are corrected. Then go back to Record Attendance against the correct title and date. Then check select attendees again and save the attendance. This fixes any errors.

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Instructions: Change the title to reflect the topic of the session. If necessary, adjust hours and location. Specify objectives by clicking the + in the objectives grid. Check of specialities as they apply. When finished, click Save.

	Name:	Sidra Heart Center Lecture Ser	ies - 12/10	/2019	(		
1	Location:	Other	•				NEVER replace the name and date. The
	Date/Time:	12/10/2019 7:30 AM	Ø	to	12/10/2019 8:30 AM	o 🖾	<b>NEVER</b> replace the name and date. The
	Allow Texting Minutes Prior:	Allow Texting Minutes After:	-				topic is entered in a different tab.
	30	30					•
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	Accine objectives						American Date Format MM/DD/YY
	Objective 1:						
	Objective 2:						Only USE DATE PICKER!!!
	Objective 3:						سدرة للطب 🕼 🚬
							Sidra Medicine



### Look up correct activity title and date!

	CNE Nursing Credits	1
	CPE Pharmacy Credits	1
	QCHP Credits - Category 1	1
	IPCE Credits	1
Credit	Inport Only): 1	
Add	Users:	
🔳 Aut	o-Award Credits for Added Users	Lo
Lookup	& Add Existing User:	
		Ur

Check to see that all available credits for the activity are selected – this one has 1 hour. It will issue several lines for each person as it adds the credits one by one.

Anna gets three credits and it will auto-select the right ones for her from this menu. You can also award partial credits but round down. Always ensure you see the activity title and the date, NOT THE TOPIC.

ok up users – internal directory. add external users.



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Inst	ructio	ions: Click the help icon for detailed	l instructions	on the use of this	screen.									
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Record Attendance (Total:30, Attended:18 No Attendance:12)
Cannot find Sidra staff? Contact Dharma Natarajan so he can add
Instructions: Click the help icon for detailed instructions on the use of this screen.
Cannot find Nur Hedzir, Griffiths Angharad and Armida
Dela Cruz.

Sidra Grand Rounds - November 28, 201 🗸 🗆 All 🗆 Parents Only 🥝

dnatarajan@sidra.org

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		IPCE Credits	1		<u>Briza, Anna Liza</u>	36	RN, BSN	IPCE Credits, QCHP Credits - Category 3,	<u>Transcript</u>	Category 1	26	1.00	11/28/2019	Remove Credit
	Attenda	ance Date: 11/28/2019						QCHP Credits - Mixed Category 1 & 3						
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	🔳 Aut	to-Award Credits for Added Users					BSN	QCHP Credits - Category 3,						
	Lookup	o & Add Existing User:	•					QCHP Credits - Mixed Category 1 & 3						
		New Attendee To System	Colort		<u>Catabay,</u> <u>Rechelle</u>	2369	Dental Assistant	Non-Physician Participation Credit	Transcript	8	0	0		Remove Credit

# **Bulk Upload of Attendance**

You can also Bulk Upload Attendance (under Resources) using the EXCEL Template. Use the CE Credit Category ID numbers on the right. Nominate in 5 categories: nurses, physicians, pharmacists, allied health and non-physicians. For a/health select the QCHP credit that applies – 26, 28 or 29. See examples below.

Email	First Name	Last Name	Degree	CE Category ID
aakers@sidra.org	Adam	Akers	MD	1
abriza@sidra.org	Anna	Briza	RN	7
gberger@sidra.org	Gabriela	Berger	PhD	3

CECreditCategoryID	Credit Type
<b>T</b>	<b>T</b>
1	AMA PRA Category 1 Credits™
3	Non-Physician Participation Credit
7	CNE Nursing Credits
23	CPE Pharmacy Credits
26	QCHP Credits - Category 1
27	IPCE Credits
28	QCHP Credits - Category 3
29	QCHP Credits - Mixed Category 1 & 3

### Wrong session title, wrong place for topic



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Setup	Date/Time	Overview	Needs Assess	ment & Barriers	Specialties	Credits	s & Sessions (1.0	10) Ma	rketing	Budget	Compe	tencies	Objec	tives
Curriculu	m Faculty (4	4) Agenda	(1) Tests	Evaluation	Registrants (2	- \$0.00)	Owners	Publishin	g (	Documents	Notes	Applica	tion	Followups
Search Fl	ags Metrics													

Instructions: Sessions are also referred to as tracks. A session takes place within a larger meeting/conference and is one of several, concurrent meetings. Edit the sessions below, and make sure the times are correct. Session times are the times you will work within when creating the meeting agenda.

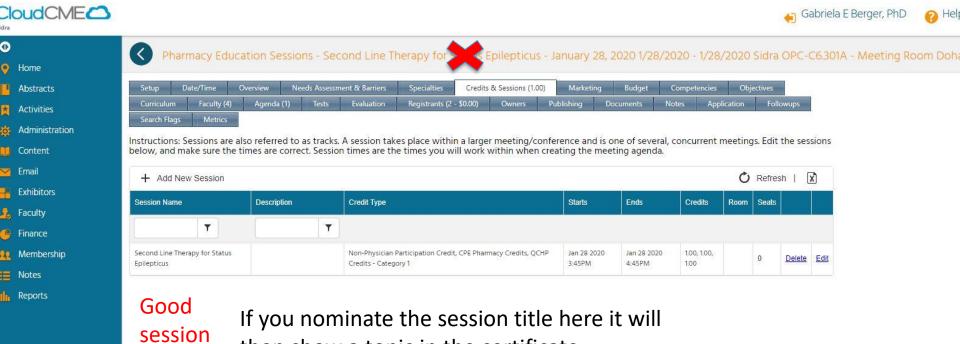
+ Add New Session						Ċ	Refres	sh   []
Session Name	Description	Credit Type	Starts	Ends	Credits	Room	Seats	
τ	<b>T</b>							
Pharmacy Education Sessions - Second Line Therapy for Status Epilepticus - January 28, 2020		Non-Physician Participation Credit, CPE Pharmacy Credits, QCHP Credits - Category 1	Jan 28 2020 3:45PM	Jan 28 2020 4:45PM	1.00, 1.00, 1.00		0	<u>Delete</u>

This is where the session title or topic goes but you need to click edit on the right.



👍 Gabriela E Be

### Right session name below but still wrong activity title above.



then show a topic in the certificate.

title.

Correct activity title. Always ensure it is correct first. Then click Credits & Sessions and this will open up the tab. Click edit on the right, then edit your session title. Save.

Setup	Date/Time Overview	Needs Asse	ssment & Barriers	Specialties	Credit	ts & Sessions (1.00)	Marketing	Budget	Competencies	Objectives	Curriculum Fa	culty (4) Ag	jenda (1)	Tests	
aluation	Registrants (2 - \$0.00)	Owners	Publishing	Documents	Notes	Application	Followups	Search Flags	Metrics						
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👝 Gabriela E Berger, PhD

Cloud CME Dashboard issues: RED Hand – incomplete. Nominate faculty, complete disclosures, enter learning outcomes. Correct for Sidra Grand Rounds, Pharmacy Ed.

	Dashboard											
Home												
Abstracts	Export XLS 📿 Refresh											
Activities	Activity	Code	ID	Approved?	Date	AC	AA	Owners	Location	Objectives?	faculty	Disclosures
Administration	Acuvity			Approved?	Date	AC	AA	Owners	Location	Objectives?	laculty	Disclosules
Content	Pathology Grand Rounds - January 26, 2020	HSGI- 01-	1694	4	1/26/2020			Meda Elshobasy, Ruby Mathew,	Sidra Medicine Auditorium	Y	٥	0
Email		P131										
Exhibitors	Pathology Weekly Case Update:	HSGI- 01-P55	1145	4	1/27/2020	Meda Elshobasy,		Meda Elshobasy, Ruby Mathew,	Sidra Medicine	N	0	0
Faculty	Microbiology - January 27, 2020					Elonobaoy,		ready matrices,	, additionally			
Finance	Arabic for Medical Purposes - January 27.	HSGI- 01-	1388	1	1/27/2020			Michelle O'Brien, Carmela Gardones,	Other	N	1	1
Membership	2020	P148										
Notes	Sidra Heart Center Lecture Series - January	HSGI- 01-	808	4	1/28/2020			Julianne Metcalf, Ma Christina Olano,	Other	N	1	1
Reports	28, 2020	P156						official diality,			-	
	Dediatric Grand Rounds - January 28, 2020	HSGI- 01- P153	1464		1/28/2020		Kimberly Nieto,	Kimberly Nieto, Christel Rapada,	Sidra Medicine Auditorium	N	<u>0</u>	0
	Pharmacy Education Sessions - January 28, 2020	HSGI- 01- P165	1320		1/28/2020			Nadeem Zia,	Sidra OPC-C6.301A - Meeting Room			1
	Sidra Grand Rounds - January 29, 2020	HGSI- 01- P126	1124	2	1/29/2020		Gabriela Berger, Mehrosh Qureshi, Anna Liza Briza,		Sidra Medicine Auditorium			2
	Pathology Weekly Case Updates, Hematopathology - January 29, 2020	HSGI- 01-P57	585	8	1/29/2020			Meda Elshobasy, Ruby Mathew,	Sidra Medicine Auditorium	N	<u>0</u>	0
	6A Clinical Nursing Rounds - January 29, 2020	755- 472	755	1	1/29/2020			Jacob Magwenzi,	Other	N	<u>0</u>	0

سدرة للطب Sidra Medicine QR Codes can be found in **activity manager**, find your CHILD activity by the activity date. **NEVER** touch the PARENT.



### **Creating a QR Code**

Each activity has a specific QR code allocated.

- You can click on the **QR code** to print it.
- Always save the QR code with the activity title and date. Eg. Sidra Grand Rounds 29 Jan 2020
- Attendees need to use their mobile app and take a photo of the QR code.
- This will create an attendance record under the tabs: REPORTS-FINANCE-REGISTRATION





**For all activities comprising of 1 hour to 2 hours you may create a QR code.** *These are short educational rounds/journal clubs. This works well if you provide full credit. It is up to participants to be honest when claiming credits.* 

For all activities over 2 hours you can use the QR code to sign in but you also need to create a sheet to sign out. These are workshops, conferences, seminars. Registration lists can be created before the event, administrators can then register attendees and record attendance after the event.

The QR code should be randomly flashed onto the screen in the middle of the PowerPoint presentation, do not post at the doors. QR codes cannot be used before or after the activity. Ensure that your activity time has been correctly set for the session.

Once participants have registered then they will be uploaded and you simply record their attendance. Finished.



Attendees have scanned the QR code. How do you find them after the session so you can award credits?

```
Go to REPORTS – FINANCE –
REGISTRATIONS
```

Then click on the **Summary** tab. A graph will appear with attendee details. Then click on the **Data** tab to find the attendee names. You can go to RECORD ATTENDANCE and add the attendance, add anyone else who failed to scan into the session.

SAVE. Done.





iii Content

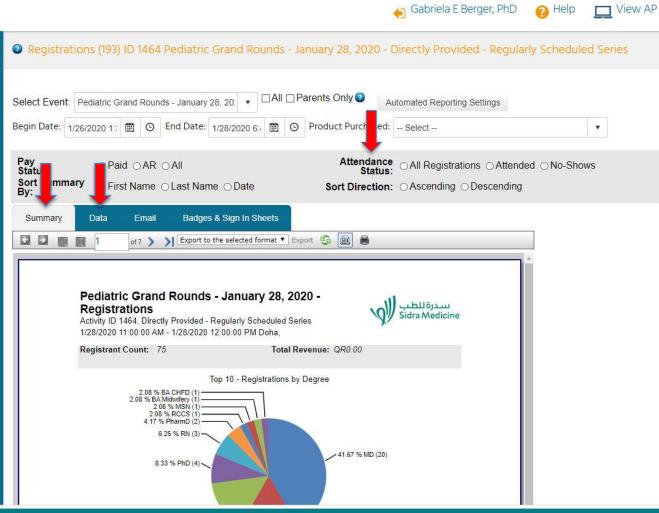
Exhibitors

🧏 Faculty

🤗 Finance

Membership
 Notes
 Reports

🔀 Email





# **Troubleshooting – QR attendance**

- 1. The most common error is with android phones, when special permission is required for the app to use the camera.
- 2. Check the settings and look for permissions.
- Once you are in the Cloud CME app you need to ensure that the app can access calendar, camera and storage. Turn them on.
- 4. Storage is needed in order to see Transcripts and Certificates.
- 5. You may also try to remove and then install the Cloud CME app again. The organizational password is Sidra.



# Activity Manager – do no touch the parent, work only on the child

### ON THE CHILD TABS - USE ONLY THE FEW SPECIFIED

Do not use all the tabs available, some you should never touch because the activity has been accredited according to the tabs.

Allowed are the following tabs:

- 1. Evaluations add the evaluation.
- 2. Credits & Sessions: Only to add the session name. Do not touch the credits.
- 3. Specialty this is your target audience
- 4. Objectives important to add
- 5. Faculty important to add
- 6. Evaluations important to add
- 7. Never ever DEACTIVATE an activity. It will be GONE.



App Store Preview

# Attendees

Once they have registered on Cloud CME by submitting their profile first. Then attendees can download the app. Use the Sidra email, the password is Sidra.

Attendees can scan their attendance by using a QR code which you show during the activity on the PowerPoint.

Educators can submit educational materials for attendees. They can also use the audience response system.





# Thank you for attending our training sessions.

Further information is located under the RESOURCES tab. <u>https://sidra.cloud-cme.com/</u>

We value your feedback. 🙂

We would like to hear from you so we can improve your experience. If you are happy to share, please complete our brief 5 minute survey. We will collate this feedback and share the results with you. <u>https://www.surveymonkey.com/r/3PC2MKM</u>

Please submit your comments by 28<sup>th</sup> February 2020.

