RSS Coordinator Training Manual

Updated October 14, 2026

Questions not covered in this manual? Contact UVACE at uvace@uvahealth.org

UVA Health Continuing Education
Provided by the School of Medicine and School of Nursing

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Overview of Responsibilities

As an RSS Coordinator, you are responsible for the day-to-day management of your Regularly Scheduled Series (RSS) to ensure UVA stays compliant with our accrediting body, the ACCME. This includes managing your sessions from the RSS Dashboard, coordinating with staff and faculty for disclosure forms and other required paperwork, and assisting your learners in claiming their credits when needed.

Your task for *each* session is to collect and enter the required information below into CloudCME. Unused sessions *must* be deleted.

1. Session title, topic, and location (if it varies)
2. Date and time (if it varies)
3. Faculty (aka speakers and moderators)
    a) Completed disclosure form
    b) CV or bio (required for non-UVA speakers)
    c) Presentation files (required only when there are financial disclosures)

Deadlines and Disclosure Forms

Once you enter or verify the information above, sessions will be reviewed and approved by the UVA Health Continuing Education (CE Office). The deadlines below are necessary for our CE Office to efficiently manage all of the offered series each calendar year.

All Faculty (Activity Directors, Speakers, Moderators, etc.), Planners, and RSS Coordinators 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://UVA.cloud-cme.com** and select ***Disclosure Form*** from the bottom right.

- All disclosure forms & non-UVA CV/bios for the activity must be submitted through CloudCME **no later than 10 business days** prior to the session date.
- If a speaker has financial conflict(s), speaker presentations must be submitted **no later than 5 business days** prior to the session date.
- Peer reviews must be completed at least 3 business days prior to the session.
    - If the peer reviewer requests edits, final slides must be uploaded to CloudCME no later than 24 hours prior to the session.

Sessions with disclosure forms and/or presentations submitted outside of these deadlines will not be approved. If a session is not approved, learners will not be able to claim and receive credit for that session.

Getting Started

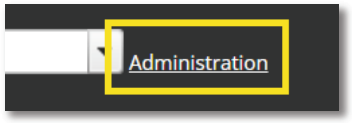
Before you begin for the first time, make sure your CloudCME profile is correct and complete:

- Launch Google Chrome (rather than Internet Explorer, Safari, or Firefox) and go to **https://UVA.cloud-cme.com**
- Click ***Sign In*** then choose ***UVA Faculty and Staff***
- Select ***MyCE*** then ***Profile*** and confirm all information is correct and complete
    - 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

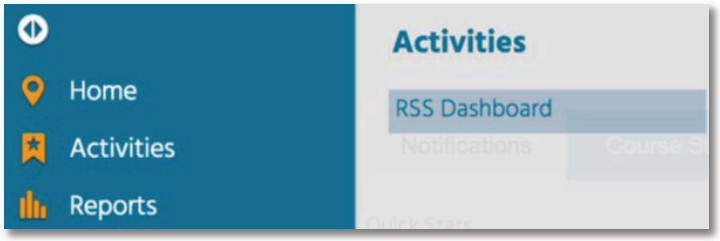
The Basics

Site Navigation

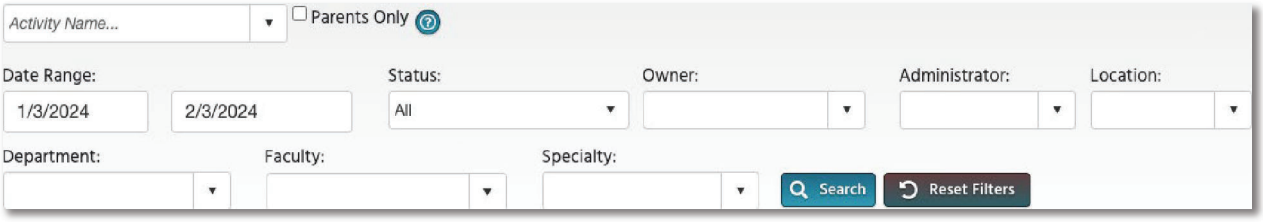
- Go to **https://UVA.cloud-cme.com** and sign in with your UVA ID and password
- Click the word ***Administration*** in the lower left of the screen



- Select ***Activities*** then ***RSS Dashboard*** (note that depending on your role, you may see more options on this side menu)



The RSS Dashboard provides a minimized view to easily manage your series. You will see all your assigned sessions. If needed, you can search by the Activity Name (or text code), Date Range, Status, Owner (aka RSS Coordinator), Location, Department, Faculty, or Specialty.

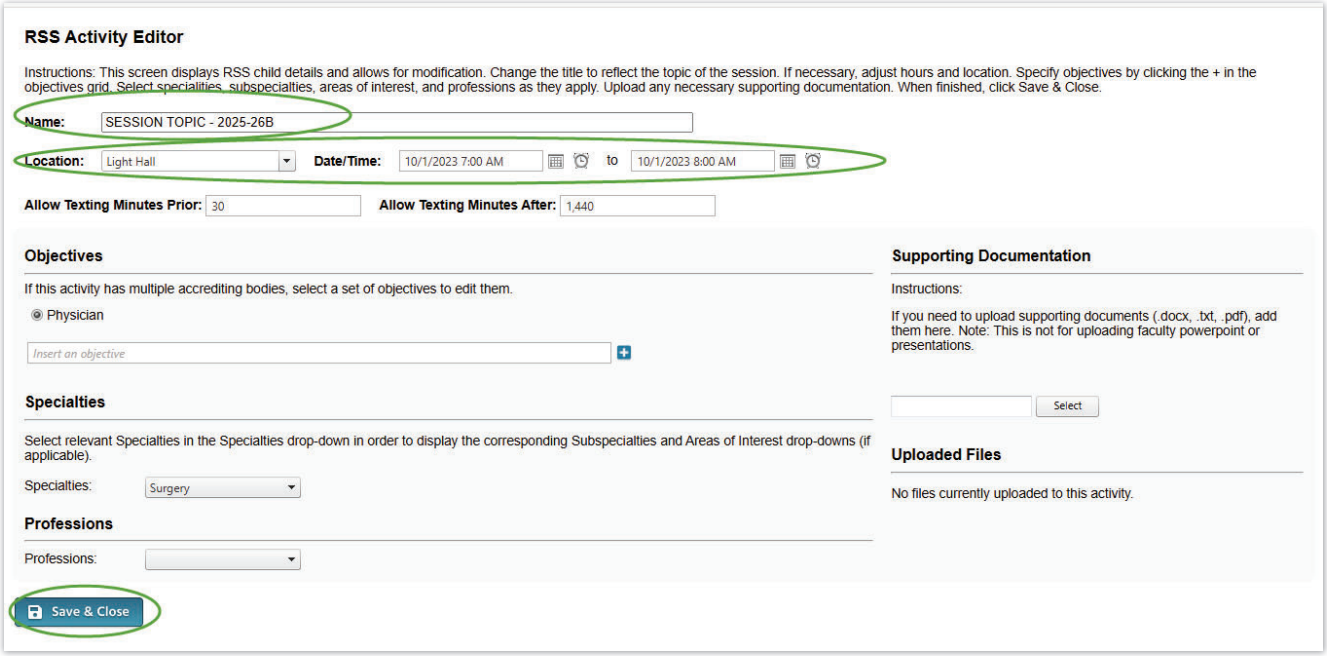


Adding Required Session Components

Click the title of the activity OR the pencil icon from the RSS Dashboard and a new screen will display.

- Enter the title/topic for the session. This is now required by the ACCME. We realize some topics may repeat or may not be clearly outlined, but any title or description of the session you can include will help meet ACCME compliance criteria. Specifically, you can follow these guidelines:
    - **Grand Rounds**: Specific session title, presentation title
    - **M&M**: Health event addressed; Quality improvement topic
    - **Tumor Board**: Type of tumor discussed, treatment plan, pathology
    - **Case Conference**: Description of case discussed presentation title
    - **Journal Club**: Journal article title or specific topic

      ** Activity types are NOT interchangeable eg. Grand Rounds cannot offer an M&M
- Update location and/or date/time if needed
- ***Save and Close***



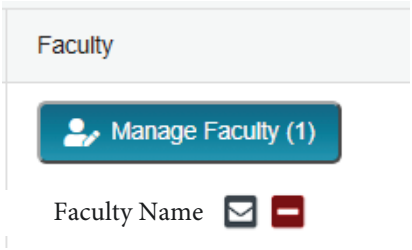
Click ***Manage Faculty*** and add any speakers/presenters/moderators not already listed.

- Search by Lastname, Firstname and ensure ***Request Disclosure*** and ***Request Presentation*** are checked then click Add Faculty
    - If from UVA and they have 2 accounts, use the @virginia.edu domain and email uvace@virginia.edu
- If the series is a case conference, the Activity Director(s) will already be listed here.

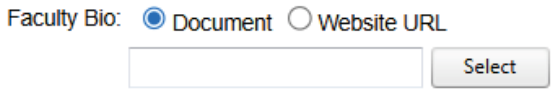
Adding Required Session Components (continued)

- In the Faculty column, confirm all faculty listed have an up-to-date disclosure form and CV/bio (if non-UVA) on file in CloudCME. If they do not, follow up with them until completed, which must be a minimum of 10 business days in advance of the session. The session will remain in Incomplete status until all disclosure forms are on file in CloudCME.
    - Request CV/bio of all faculty, but only non-UVA faculty are required to have one on file.

To view and/or manually add a CV/bio:



- Click on the faculty name under the blue Manage Faculty button.
- Select the Photo & Profile tab and review the Faculty Bio section.
    - If uploading a document, click the Select button and choose your document.



    - If sharing a webpage, click the Website URL radio button and paste the link.

    - Scroll to the bottom and click update.

If an upcoming Faculty does not already have a profile in CloudCME, they will need one before you can add them to the session. You can either add them administratively OR you can instruct them to go to **https://UVA.cloud-cme.com** to create a profile themselves, whichever is preferred.

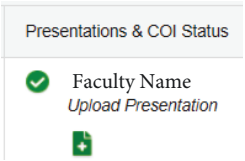
To add them administratively:

- Go to ***Membership*** then ***Add Member***
- The profile form has many fields. While complete information is helpful, the fields below are the minimum required:
    - First Name
    - Last Name
    - Degree (used to confirm credit eligibility)
    - Organization
    - Email address
    - Department
    - Credit Eligibility
- Once complete, click ***Add*** at the bottom of the screen

Column: Presentations & Conflict of Interest (COI) Status
An icon displays in this column when one or more faculty have disclosed a financial relationship in their disclosure form. You'll see the status change to "In Review" if any faculty have COI. It changes to "Pending" if they do not have COI. You can also view in this column if a faculty has uploaded a presentation. Faculty with COI must submit draft presentations for review no later than 5 business days prior to a session.

UVACE will assign the peer reviewer in CloudCME to complete the mitigation process. If the peer reviewer requests revisions, the final slides must be uploaded no later than 24 hours prior to the session.

Ask the faculty to upload their own files or upload them yourself using the green paper plus icon in the Presentations & COI Status column.



Faculty can log in at https://cloud-cme.com and select the orange Faculty button from the top menu. Under upcoming presentations , a request to upload their slides will be listed. On the RSS dashboard a new icon will appear in the Presentations column, which you can click to download the file.

Session Status

You should regularly check your RSS dashboard to monitor the status of your sessions. We recommend RSS coordinators check the RSS dashboard **on a daily basis**.

All sessions begin as ***Incomplete*** and move to either ***Pending*** or ***In Review*** as you add session details and disclosure forms are completed. If ***In Review***, the CE Office needs to review potential conflicts listed on a disclosure form. The CE Office moves sessions from ***Pending*** or ***In Review*** to ***Approved*** as long as all conflicts of interest can be mitigated and all deadlines are met.

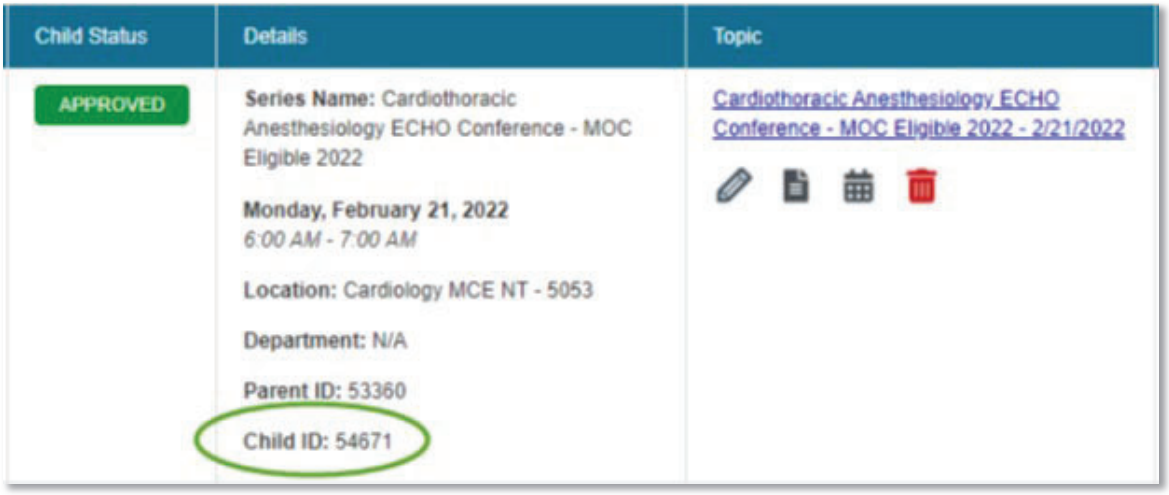
- All disclosure forms and CV/bios for non-UVA faculty for the activity must be submitted through CloudCME ***no later than 10 business days*** prior to the session date.
- Speakers with financial conflicts of interest must submit their presentations ***no later than 5 business days*** prior to the session date.
    - Peer reviewers have until 3 days prior to the session to complete the peer review.
    - If a peer reviewer requests edits, final slides are due at least 24 hours prior to the session.

For activities with faculty who frequently have financial conflicts, it is recommended that there are two (2) designated peer reviewers in CloudCME in case the primary reviewer is away.

Pro Tip: As soon as the RSS Coordinator becomes aware that faculty have a financial conflict and the materials will need a peer review, they can notify the faculty so they are aware that they'll need to submit materials for review, as well as notify the peer reviewer of the upcoming review so that they can plan accordingly.

Texting Code

The texting code learners will use is the Child ID (note that it may have 5 or 6 digits).



Brochure/Handout

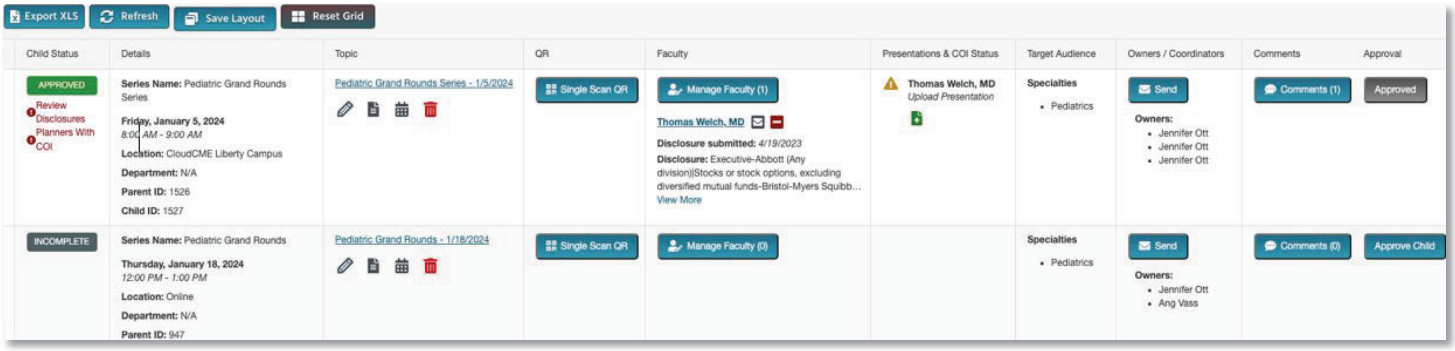
Click the icon to automatically generate a brochure/handout that contains the session details, text code, and other instructions to distribute to your learners.

The file is a word document and may also be edited to provide additional details before distribution. Session details meet ACCME compliance requirements and should not be removed.

The flyer may be distributed once the faculty has completed their disclosure. If the remaining deadlines are not met (eg. faculty has a conflict of interest and does not submit their draft slides at least 5 business days prior to the session), or the session is not approved for some other reason, notify the learners as soon as possible that the session will not offer credit. Ask UVACE for support.

Learners cannot claim credit with the code until the day of the activity.

Full Glossary of RSS Dashboard Terms and Icons



Column: Child Status

This column contains a status icon and will update at various points in the workflow.

INCOMPLETE

Incomplete: This status means that the session is missing required details. You will see Incomplete by default until faculty have been assigned, and disclosures have been completed. This is the initial default status of every RSS child activity.

PENDING

Pending: This status represents a session that is complete and is pending review by the CE Office for approval. This means all faculty have completed a disclosure and there was no Conflict of Interest (COI) (i.e. nothing was disclosed, or a potential COI was mitigated). It is pending approval by the CE Office, and no further action is needed by the CME Associate.

IN REVIEW

In Review: This status represents a session with faculty who have a completed disclosure and a potential Conflict of Interest has been noted on their disclosure form, which must be mitigated. Faculty must submit materials no later than 5 business days prior to the session for peer review mitigation.

APPROVED

Approved: This represents a session that needs no other information and is ready for learners to text in and receive credit.

REJECTED

Rejected: This represents a session where deadlines were not met and the activity is rejected.

Column: Details

This column displays various details about the series and session including location, text code (Child ID), time, and date.

Full Glossary of RSS Dashboard Terms and Icons (continued)

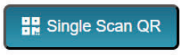
Column: Topic
Click the session's title OR the pencil icon to edit the title, date, location, and any other applicable details. Supporting documentation files can also be uploaded here as needed.

Pencil Icon: Edit the title, date, location, and any other applicable details.

Brochure/Flyer/Handout Icon: Click this icon and the system will automatically generate the activity brochure/handout for distribution or display. Add additional info as you see fit.

Calendar Icon: Click this icon and the calendar will display the scheduled sessions in this series.

Trash Can Icon: Click this icon to delete any unused sessions (of any status).

Column: QR
Click to download or copy a QR code to share with learners. 

Column: Faculty
This column is for adding, removing, and communicating with faculty.

Manage Faculty Button: Edit the title, date, location, and any other applicable details.

Envelope Icon: Click this icon and a pop-up window will display for you to create an email message to send to the faculty member. When an email is sent, the system will record this action and place a note in the notes section.

Red Minus Icon: Click this icon to remove a faculty member from the session

Session Changes

Moving a Session
When setting up your series, sessions are automatically generated based on the scheduling information given in the application for credit. Some series meet very predictably (e.g., the first Monday of each month), while others meet at variable dates and times, and you will need to adjust them to their correct date and time.

If you need to adjust a session's date and/or time:

- Click the session's title and edit the Date/Time fields
  OR
- Click the calendar icon and drag and drop the session to a new date

When moving a session, ensure it is not one that has been previously approved and used as this will interfere with learner credits.

When changing the session to a different date, be sure to also update the date displayed in the activity title. The date in the title is static and does not automatically update when the activity date is changed.

Adding a New Session
If a new session in your series is needed:

- Navigate to any other session in the series
- Click the calendar icon and double-click on the desired date.
- Complete the session details in the pop-up that appears and add faculty as usual.

Updating an Approved Session
If you need to add a session's topic after the session has been approved and/or held (common for some case-conferences where topics are not chosen in advance), this may be done without impacting the session's status. However, larger changes that need to be reviewed by UVACE such as changing faculty or updating a disclosure will change the session's status from Approved back to Pending or In Review. If changes requiring review and approval by UVACE are needed, they must still be done at least 10 business days before the session occurs.

Deleting Unused Sessions
Any sessions that are canceled or not used should be deleted in a timely manner by clicking the trash can icon underneath them. The session may be in any status. Not deleting these unused sessions makes it appear as if required session topics have not been entered and will impact your series renewal.

If a series will no longer be meeting at all, please contact UVACE at uvace@uvahealth.org

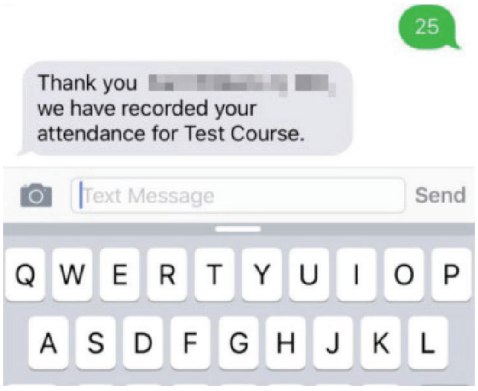
Assisting Learners

Texting for Credit

All learners must record their attendance within 6 days of the session.

If the activity offers MOC Part II credits, physician learners must also complete the evaluation in CloudCME bwithin 6 days of the session to receive credit, regardless of whether they're claiming MOC Part II or not. MOC Part II is not offered in December for reporting purposes. Non-physician learners are encouraged to complete the evaluation, but not required.

When recording attendance, learners will immediately receive a message like the one below noting that their attendance has been received and recorded.

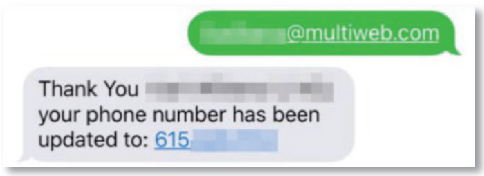


For MOC Part II sessions, credit awarding occurs after physicians complete the evaluation. Users can log in to **https://UVA.cloud-cme.com**, click the ***MyCE*** button, then select ***Evaluations & Certificates***. They can download or email that transcript to themselves or others at any time.

If a learner is new to UVA and needs to set up a CloudCME account:

- For Non-UVA learners: Go to **https://UVA.cloud-cme.com** and select Sign In > Sign in with your Email and Password > Create New Account
- For UVA learners: Go to **https://UVA.cloud-cme.com** and select Sign In > Sign in with your UVA Computing ID & Password (SSO) and log in via NetBadge.

Note that before texting for the first time, they will need to pair their account with CloudCME by texting their email address, exactly as it appears in their profile, to 855-776-6263. This only needs to be done once, and they will receive a confirmation similar to the example below.



Assisting Learners (continued)

If a learner is having difficulty, confirm the following with them before reaching out to the CE Office:

- They are texting the correct text code (Child ID) and are within the 6 day timeframe of the session.
- They are sending the text code to 855-776-6263 and are not including any additional words, emojis, or other characters.
- They are sending an SMS text message rather than an iMessage.

Note that learners may text multiple times if needed during troubleshooting. CloudCME will not award duplicate credit via texting. If a learner is still having difficulty, or if they have forgotten to text within the 6 day timeframe, reach out to uvace@virginia.edu for support.

Do not record attendance for learners. CloudCME awards automatic credit when an individual learner records their attendance (if an evaluation/quiz is not required), however, if an RSS Coordinator records attendance through the Administrator portal, it does not award credit. UVACE must award and report the credit.

Reminder to Complete Evaluations

Learner evaluations are available for all sessions and are required for physicians to claim credit for activities offering MOC Part II credit, regardless of the type of activity (Grand Rounds, case conference, etc).

After texting, learners should log in at **https://UVA.cloud-cme.com** and select ***MyCE*** then ***Evaluations & Certificates*** from the top menu to complete the evaluation.

- To complete a REQUIRED event evaluation (physicians claiming MOC Part II), physicians will receive an email regarding the evaluation after entering the code, or they can go to Evaluation & Certificates in CloudCME and click on the eval associated with the specific session.
- To complete an OPTIONAL event evaluation, learners receive an email notification, but they do not have to complete the evaluation for credit to be awarded. Credit is automatically awarded after they record attendance.

Miscellaneous

Renewals

In order to remain compliant with the ACCME, each series is periodically reviewed and renewed according to the schedule below.

- Each RSS is renewed every 2 years. You will receive detailed renewal instructions by email 3-4 months prior to the due date every other year.
- For more information on the renewal process, contact UVA CE.

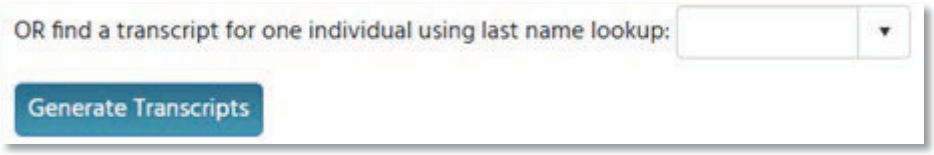
When an Activity Director or RSS Coordinator Changes

If an Activity Director or RSS Coordinator needs to be updated, please reach out to the CE office at uvace@uvahealth.org as soon as possible so we may update your series records and ensure disclosures have been reviewed. Training must be completed within 30 days. Any delay may result in sessions not approved for credit.

Reports

As a RSS Coordinator, you have access to several different reports in CloudCME for each of your series. They can be found in the Administrative area of CloudCME by clicking***Reports*** from the left menu.

- **Attendance by Session**: a graph showing attendance by date. You may search by session name or text code. You may also search an entire series by checking the Parents Only box and searching for the series title.
- **Credits**: a detailed report of all learners who have attended a session or series. This may be further filtered by date and other details. Like other reports, you may search for a specific session by its name or text code OR the entire series by checking the Parents Only box. Run Report to search.
- **Evaluations**: evaluation results from both individual sessions.
- **Disclosures**: an additional way to search and view submitted disclosure forms for your activities. You can also use this option to determine if a faculty member, speaker, or CME associate has a current disclosure on file.
- **RSS Attendance History:** Similar to Attendance by Session
- **Transcripts:** Search for a learner's transcript if needed to assist them with credit or downloads. Search *Lastname, firstname*.

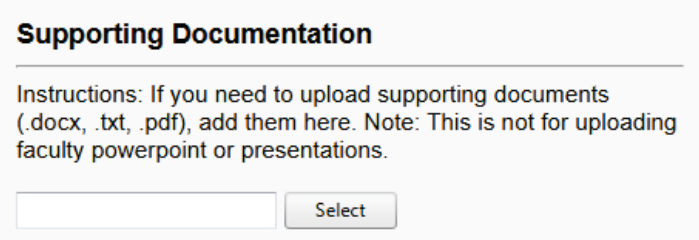


Duplicate Accounts

If someone has accidentally created more than one account in CloudCME, please reach out to uvace@uvahealth.org in order to have them merged into one account.

Supporting or Additional Documentation

If additional documentation is requested by UVACE or there is relevant documentation to save, such as correspondence, upload it into CloudCME via the RSS Dashboard. Click on the topic title and go to Supporting Documentation:



The document must have a GREEN dot next to it. If it has a RED dot , remove the file, change the type of file and try again. Make sure to click the blue Save & Close button or the document will not save.