# Compliance Checklist for

# Tumor Boards and Case Conferences

This document details the responsibilities of the department requesting the education. The CPD Department must receive the following information after *each* meeting. Log in: [AdventHealth Continuing Education (cloud-cme.com)](https://adventhealth.cloud-cme.com/default.aspx)

[ ]  Case Summary Page

 Indicates the number of cases discussed.

[ ]  Disclosures

 Disclosures must be obtained and shared with learners **prior** to the education. The information can be printed from the *RSS Dashboard* > Topic column > sheet of paper. The CPD Department verifies and creates a disclosure slide for the presentations.

[ ]  Accounting form

**All** expenses (food/venue, etc.) and/or income collected from exhibitors, donations, etc., must be reported on the accounting form available at the bottom of the portal Homepage under CME Templates.

 **NOTE: Departments cannot allow vendors to pay for or supply food without talking to the CPD Department first.**

[ ]  Contracts, Receipts, and Expenses

 Copies of all signed contracts for lectures/ meetings must be uploaded, including but not limited to, exhibitors, sponsorship, catering, speaker honorariums, parking, venue, gifts, etc.

 **NOTE: Departments cannot allow vendors to pay for or supply food without talking to the CPD Department first.**

[ ]  Upload documents in the RSS Dashboard

Case summaries, disclosure information, clinical trial information, PowerPoint presentation(s), journal articles, rack cards, speaker bios, etc. can be uploaded via the *RSS Dashboard.*

[ ]  Calendar Invites

Calendar invites for the entire year to the CPD calendar (CFD-S.CPD.Department@AdventHealth.com) and your designated CPD Coordinator.

[ ]  Activity Codes

Each date is assigned a unique code. We recommend testing codes prior to each meeting to ensure they function properly.

[ ]  Attendance

All learners, not just physicians, **must** record attendance electronically by texting the activity code. The Activity Owner is responsible for ensuring attendance is documented, texting is the only method for learners to receive credit. Paper sign-in sheets are not accepted. **If accurate attendance is not captured, providing credits can be suspended.**

[ ]  Exhibitor(s)

Anyone offering payment of any type to interact with learners or to display company specific items is an exhibitor. **Contact your CPD Coordinator before accepting any offers**. A **signed agreement** is required before permitting company reps in the education space. Exhibitors must be in a separate room from the education. Exhibitors can answer direct questions but cannot elaborate on their products.

 **NOTE: Vendors cannot pay for, or supply food, without talking to the CPD Department first.**

**TIP:** Please do not call the code a ‘CME Code’ it is for attendance, or share activity codes via email. Codes are date and time specific, active 30 minutes **prior**, **during** and 60 minutes **after** lectures. Instruct learners to:

**Sign-in by texting XXXXX (activity code) to (321) 430-2999.**

[Log into the System](https://adventhealth.cloud-cme.com/default.aspx) > adventhealth.cloud-cme.com

* Sign-in with your OPID and OPID password (the same login used for Epic).
* At the bottom of the page, above *CME Templates* > look for the *Administration* option.
* On the left side > select the *Activities* option > *RSS Dashboard* option.
* Adjust the date range to the dates you want to view > *Search.*
* You can view and adjust many things from the *RSS Dashboard.*

# RSS Dashboard – Understanding the Columns (click the arrow to expand each field)

## CHILD STATUS

1. Must show approved to award credits.

## DETAILS > Department Responsibility

This is the attendance code for each activity. Codes for the Parent (the primary number) and specific dates (child ID number) are shown.

1. Parent ID = Primary code for the entire series.
2. Child ID = Activity codes for each date.

## TOPIC > select the Name or Pencil

1. ***Pencil – Allows you to change***
	1. The name of the presentation.
	2. Location.
	3. The date and/or time of the activity.
	4. PLEASE DO NOT CHANGE THE TEXTING MINUTES, THIS IS A GLOBAL FUNCTION.
	5. Add or change the *Objectives.*
	6. Right side > Supporting Documentation > Select and upload the presentation and copies of receipts, contracts, etc.
	7. **SPECIALTIES** > This information came from the application. To make changes select *Specialties* > check or uncheck as needed.
	8. **PROFESSIONS** > This information came from the application. To make changes select *Professions* > check or uncheck as needed.
	9. Save and Close
2. ***Document or Paper Icon***
	1. Generates a flyer with ACCME required information to provide learners: COI statements, objectives, and accreditation and designation statements.
3. ***Calendar Icon***
	1. This icon currently has a glitch **DO NOT** use it.
4. ***Trash Can***
	1. This deactivates the activity date. Please DO NOT use this icon to delete an activity.
	2. The CPD Department is required to report on every date during our audit. Please email the CPD Department CFD-S.CPD.Department@AdventHealth.com with the reason a date is cancelled.

## QR Code

1. This is used with the CloudCME cellphone app. The app can be downloaded from the cellphone carrier app store. It is undergoing changes and should be available in 4Q25.
2. Once downloaded, the Organization Code is: Adventhealth

## PLANNERS & COI STATUS (Individuals who help plan and/or select speakers or topics)

Allows a quick glance to:

1. Ensure COI forms are current.
2. If a form is missing or expiring, click the envelope next to the name. In the email, request the COI be completed or updated.
3. DO NOT change the ‘Reply to’ Name, the CPD Department receives a notification when form is completed.

## FACULTY (The speakers for each date)

For a tumor board or case conference, faculty is considered the core panel members required to attend.

1. Must have a current COI (above), valid for 1 year from the date signed.
2. If there is NO DISCLOSURE ON FILE
	* 1. Email the person by selecting the envelope icon next to their name to request they update/complete their COI form.
		2. Enter your message > Send.
3. ADD or REPLACE a Panel Member
	* 1. If the speaker’s COI is current, uncheck the box to prevent the system from sending an email.
		2. If you are unsure, keep the *Request Disclosure* checked before adding the faculty name.
		3. Add or remove as needed.
		4. NEVER delete a member from a previous date.
4. All disclosures must be submitted prior to the date added. The system records the date and time upon electronic completion. **Credits may be withheld if the COI is not submitted at least 2 days prior to the education.**

## PRESENTATIONS & COI Status (The speakers for each date)

Speaker presentations can be uploaded here or in the activity under *Topic.*

1. Presentations are not required to have AdventHealth logos; however, if branded can only have the AdventHealth or AdventHealth co-brand logos. Speakers affiliated with other organizations can have their logo on the first slide only, not on all slides.
2. Upload PowerPoint presentations by selecting the *plus icon* > read, check the box, *Continue* > upload*.*
3. Logos from ineligible companies, industry support and/or device manufacturers are prohibited on presentations.
4. Embedded photos in presentations cannot display visible logos from ineligible companies.

## TARGET AUDIENCE – SPECIALTIES and PROFESSIONS

This information came from the application. Select the TOPIC column to make changes.

1. Select *Specialties* > check or uncheck as needed.
2. Select *Professions* > check or uncheck as needed

## OWNERS/ COORDINATORS

This information came from the application.

1. These users can edit and view the activity and access reports.
2. Notify the CPD Coordinator if changes need to be made.

## COMMENTS

This area allows *Comments* to be added to the activity in the portal to document cancellation reasons.

**NOTE:** The CPD Department is **not** notified when comments are added.

**Trouble Shooting:** When learners call, go to the ‘HELP’ option on the portal first prior to referring the learner to the CPD Coordinator. If the concern is not addressed, email the CPD Coordinator mailbox.

**NOTE:** The CPD Department reserves the right to suspend awarding credits for the activity if attendance, required documentation is not received or completion of evaluations are insufficient to meet auditing purposes.

**I agree to the requirements above and acknowledge failure to provide required documentation may result in credit(s) being withheld or future activities suspended.**

**Department Coordinator:** **Date:**

**CPD Department Coordinator:** **Date:**