

# Documenting Attendance in CloudCME™ for RSS Planners

## STEP 1

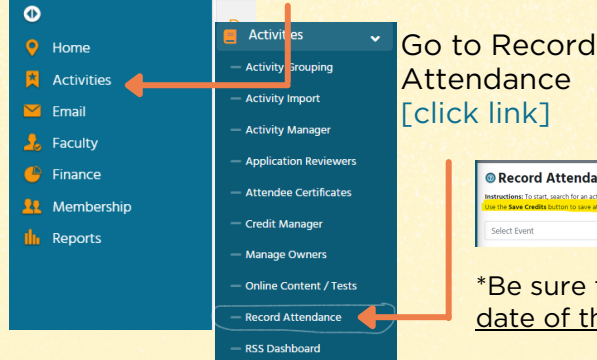
Log in from the home page using the [Log in Instructions](#). Once logged in your name appears in the upper right corner of the screen. Navigate to the bottom of the screen in the lower left corner to the [Administration Link](#).

(You can bookmark this link for quicker access in the future.)



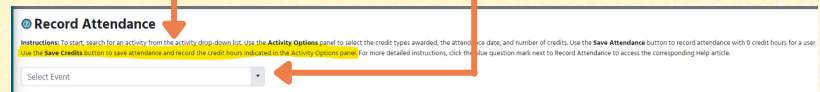
## STEP 2

Go to Activities  
[click link]



**NOTE:** Use the Save Credits button to save attendance and record the credit hours indicated in the Activity Options panel.

Enter the 10-digit activity # (NOT the parent ID #), but the # with the dash. Choose from the drop-down



\*Be sure the date listed in the description coincides with the date of the activity.

Individuals who have registered for activities appear on the list, those who have not registered need to be added manually by the planner(s).

To add a participant, click the [Add User](#) button.

If the participant is already in the system, [Search for Existing User](#).

If the participant is not in the system, use the [Create New CloudCME™ User](#) to add the participant.

When complete, choose one of the 3 option buttons:

- Add User to Roster\*\*
- Add user & record attendance (**NOTE: This does not AWARD CREDIT!!**)
- Add User & Award Credit

## STEP 3

2022 Primary Care GR: Knee & Hip Arthritis (12096) - 11/02/2022  
Credit Types Available: AMA PRA Category 1 Credits™, Non-Physician Attendance

Attendance Recorded: 11      Total Users on Roster: 20

Save Attendance   Save Credits   Remove Attendees & Credits   Remove Credits   Export XLS

User Details	Status	Credit Details	Credit Eligibility	User Professions
Sullivan, Ryan Degree: MD UserID: 3730 <a href="#">Transcript</a>	<input checked="" type="checkbox"/>	AMA PRA Category 1 Credits™ Credit Date: 11/02/2022 Hours Claimed: 1	AMA PRA Category 1 Credits™	Physician
Jiang, Shuxia Degree: MD, PA-C UserID: 4955 <a href="#">Transcript</a>	<input type="checkbox"/>	Non-Physician Attendance Credit Date: 11/02/2022 Hours Claimed: 1	Non-Physician Attendance	
Price, Janie Degree: MS, BA UserID: 3146 <a href="#">Transcript</a>	<input type="checkbox"/>	Non-Physician Attendance Credit Date: 11/02/2022 Hours Claimed: 1	Non-Physician Attendance	Administrator (Non-Clinical)

Search for Existing User:

Create New CloudCME User:

First Name:  Last Name:  Select Degree:

Email:  Select Profession(s):

\*All fields are required.

Add User to Roster   Add User & Record Attendance   Add User & Award Credit   Add User to Roster   Add User & Record Attendance   Add User & Award Credit

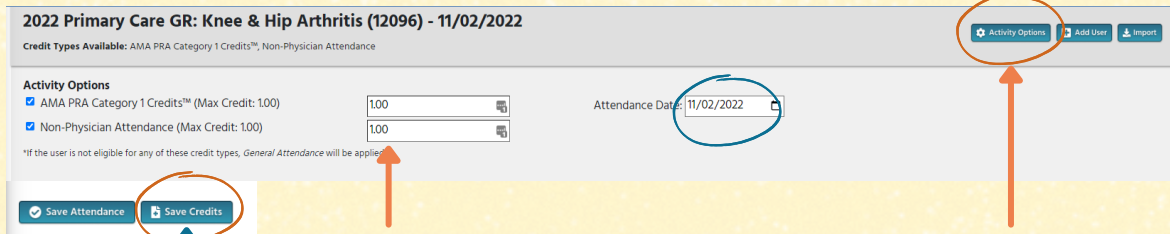
Garcia Otano, Angel Degree: MD UserID: 7594 <a href="#">Transcript</a>	<input checked="" type="checkbox"/>	AMA PRA Category 1 Credits™ Credit Date: 11/02/2022 Hours Claimed: 1
Cozzi, Phillip Degree: MD, FACP UserID: 4183 <a href="#">Transcript</a>	<input type="checkbox"/>	

Participants that have successfully documented their attendance show up with a **person icon** and **checkmark** along with **Credit Type, Date, and # of Credits**.

If the participant did not document their attendance, planners should check the box next to the participant's name and click Save Attendance at the top of the page, then check the participant box and click on Save Credits to ensure the participant receives credit.

# Documenting Attendance in CloudCME™ for RSS Planners - Additional Features

## Change Credit



1. To change the credit amount applied to a single activity date, click on the **Activity Options** button. When the drop-down window appears, you can change the activity credit amount. Be sure to change for both categories.
2. Ensure the date is correct. Click on the **Save Credits** button to make the change.

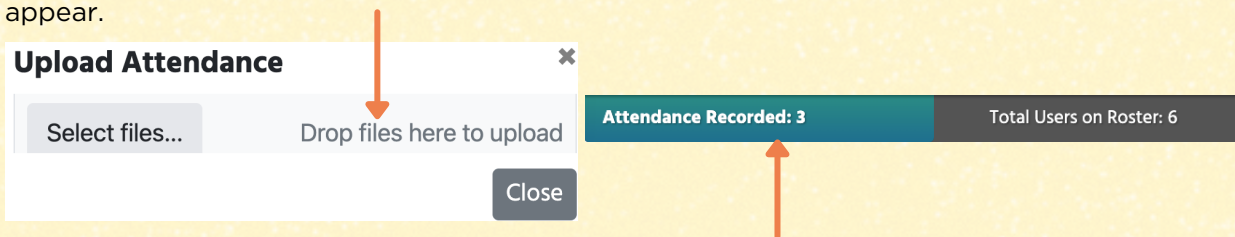
## Remove Credit



1. To remove a participant and the credit amount applied to a single activity date, check mark the individual in the list.
2. Use the **RED Remove Attendees and Credits Button**.

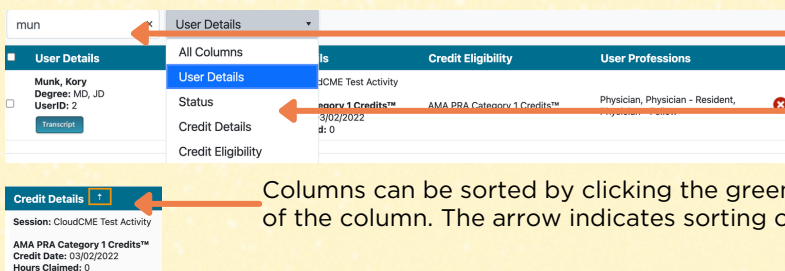
## Import Attendees

Clicking the Import button allows planner(s) the ability to import attendance by select a formatted Excel XLSX file. Once the file is uploaded and processed, a review window will appear.



The progress bar allows users the ability to view the number of attendees that are on the roster and have attendance recorded.

## Search



Search the grid attendance grid using the search bar  
Searches can be done by status, Credit details, credit eligibility, or user details.

Columns can be sorted by clicking the green portion of the column. The arrow indicates sorting order.