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To: "RSS_ADMIN_COP-request@LISTSRV.UCSF.EDU" <RSS_ADMIN_COP-request@LISTSRV.UCSF.EDU>

Subject: Early transition prep and RSS closing documents for Fiscal Year 2025

Dear RSS Colleagues,

As you know, the transition away from the current HighMarks CE portal is underway and the May 12 deadline for Fiscal Year 2026 applications has passed. Applications not yet submitted should be developed in the new Portal when it comes online. Office of CME anticipates you will have access by July 7. Moving to a new Portal has generated many questions and has implications for closing your Fiscal Year 2025 Activities.

RSS Fiscal Year 2025 Closing Documentation: Where/how should I file?

Documents attached to Activities will be manually downloaded over a period of months.

Implication: Documents added after your Activity is 'scrubbed' will be lost. Therefore, please file closing documents not already been uploaded to the CE Portal to the Box file provided, according to the requests below:

Labeling

Please label every document first with a course number, then a compliance element, then a title. Only one compliance indicator is needed in the label even if one document demonstrates several areas of compliance.

Examples:

- *MGR25279 Mitigation June 29_Samuels*
- *MGR25256 disclosure to learners, flyer October 10*
- *MGR2256 final schedule*
- *MGR25256 exhibitor agreements_all*
- *MGR25278 external Accreditor approval letter_ACEND PT*
- *MGR25265 paper disclosure_Borjal*
- *MGR25267 evaluation summary*

Location

Please file RSS Fiscal Year 2025 closing documents not already loaded in the CE Portal here: <https://ucsf.box.com/s/e87cb5ikw3fs6jld0cchwxmvdum1xz3>

Training: Where and when do I get training on the new CE Portal?

Office of CME is aware that we need to provide training. We plan to offer a formal training with experts from the CloudCME team, and the date has not been confirmed but we will offer this asap. There will be a learning curve and that high-quality training opportunities will be essential so stay tuned. Office of CME has not developed on-demand and live training resources.

Early July sessions: If I don't have training or access, how can I manage the Activity and attendance for my early July sessions?

1. Access

Access may be as late as July 7, so you will probably have to manage your FY2026 documents for sessions between July 1 and the time you are ready/trained to use the system with paper. File paper records either 1) in a shared Fiscal Year 2026 Compliance Docs Box folder (<https://ucsf.box.com/s/1w5y1xr26azaqg7fn1zuztykt23durpo>) or 2) to a local drive where you will upload to the new CE Portal by September.

2. Attendance – (preliminary instructions coming in the next 2 weeks)

It is unlikely that you will be able to use the texting or QR code from the new Portal on July 1.

However, you can anticipate preliminary steps for the self-claiming attendance process. After June 25th (to ensure no last-minute changes in the phone number), you may have potential claimants:

- complete the one-time pairing of their phones with the Cloud CME phone number (to use texting)
- download the Cloud CME app their phones (to use QR code)

3. Disclosures

Since disclosures will not transfer to the new Portal, please collect your FY2026 disclosures on paper until you are able to use the new CE Portal. You can upload disclosures for the upcoming series to Fiscal Year 2026 Compliance Docs Box folder (<https://ucsf.box.com/s/1w5y1xr26azaqg7fn1zuztykt23durpo>) or file them locally and upload them to the new CE Portal by September 2025.

In Summary

Attachments to your Activities, including closing documentation, will **not** automatically transfer to the new CE Portal. Thus, Office of CME will be manually extracting existing attachments in a systematic fashion. To avoid loss of any closing documentation, place any documentation for Fiscal Year 2025 that you have not already uploaded to the existing CE Portal in the Box folder for Fiscal Year 2025 closing documentation. Early July sessions are likely to occur before you have training and/or access to the new CE Portal. Therefore, you may need to collect disclosures on paper and delay the claiming process until you can manage the texting and QR process.

You can anticipate additional communication about training resources, process changes, and frequently asked questions in the coming weeks. Thank you for your patience as we do our best to develop tools to facilitate a smooth transition. We appreciate your partnership and look forward to sharing more updates soon.

-Stacey

Stacey Samuels, MA