New Innovations (RMS) Checklists - FAQs

MMCGME

Metro MN Council on Graduate Medical Education

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FAQ: I want to distribute a checklist, but the resident's name doesn't appear on the list.

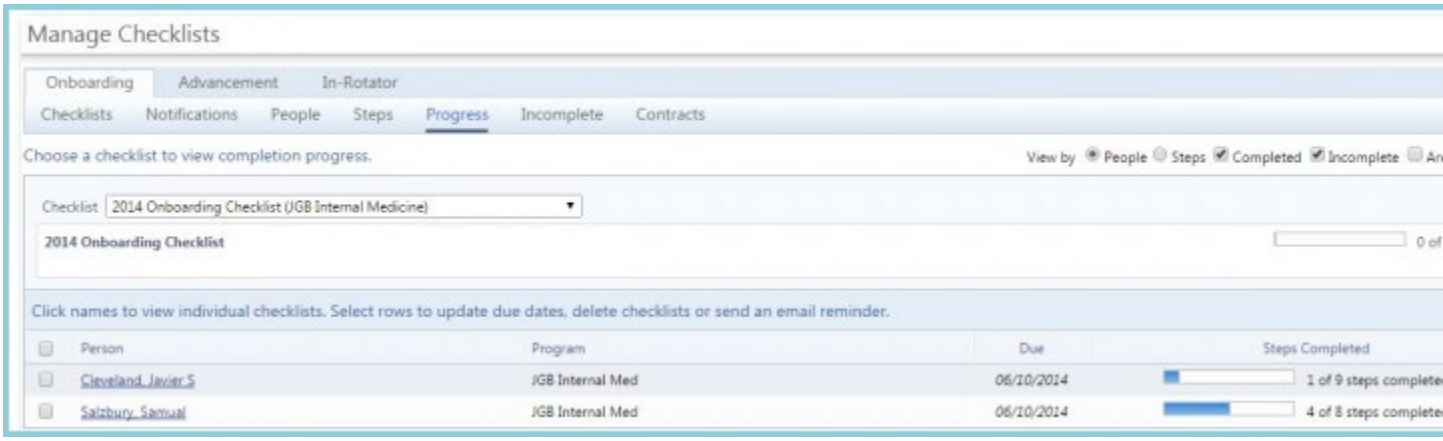
These are the common reasons for residents' names not appearing in the distribution list:

1. Wrong type of checklist - Be sure you're using the right type of checklist. You can't send an Onboarding checklist to a resident visiting from another institution.
    - Onboarding checklists can only be assigned to a resident record that has a status type of 'Incoming Resident' or 'Incoming Fellow' or is moving to another program within your database
    - Advancement checklists can only be assigned to a resident/fellow who is advancing from one status type to another or advancing to another program
    - Rotation checklists can be assigned to a resident/fellow who has a Training Record in a program that is and is assigned to a rotation in a program
2. No Training Record - Each resident must have a Training Record in their Personnel file.
3. Block Schedule - Resident must be scheduled on a rotation
4. Dates - Advancement and Onboarding Checklists must be distributed before the Advancement Date. Ex: Once an 'Incoming Resident' has advanced to a first year resident, they can no longer receive an Onboarding checklist.

FAQ: How can I tell if my residents are completing their checklists?

To check the progress of your residents for completing their checklist tasks:

1. Go to *Personnel* > *Checklists* > *Onboarding, Advancement or Rotation*
2. Select the **Progress** tab
3. Select the checklist from the dropdown list
4. View the names and the progress chart of steps completed
5. Click on a person to view that person's checklist



FAQ: The 'View Checklists' link is gone on the resident's Home page. Why?

The 'View Checklists' link expires 30 days after the Due Date of the checklist. They can still access the checklist in the Notifications section of the Home Page.

FAQ: When a checklist has multiple reviewers, can each reviewer see the action taken by other reviewers?

Reviewers can see actions by other reviewers such as uploads, returning a step, comments, and marking a step as complete, but they are not able to see which reviewer performed the action or wrote a comment.

FAQ: Why isn't one of my fellow's name available to distribute an Advancement checklist?

Advancement checklists can be distributed only to residents/fellows whose Training Records reflect any of the following conditions:

- Advancing to another year within their current program
- Graduating
- Becoming Faculty
- Advancing to a new program

If your fellow is advancing from a different program in your database (for instance, one of the Internal Medicine residents will start in your fellowship program next), then this person will be available to distribute an Onboarding checklist instead of an Advancement checklist.

FAQ: How can I change the Due Date on a distributed checklist?

1. Go to Personnel > Checklists
2. Click on either Onboarding, Advancement or Rotation
3. Click the **Progress** tab
4. Select the checklist name in the dropdown
5. Place a check next to the people whose due date you wish to change (you can place a check in the top box to select all)
6. Using the Actions dropdown box on the right. Select **Update Due Dates**
7. Adjust the date
8. Click **Update**

This does not apply to a due date for a step.

- If your checklist is on hold

Release it first, then follow these steps to update its due date.

FAQ: Who is able to return a checklist step to a resident?

This option is only available for individuals who have Level 5 or 6 privileges in the department where the resident's demographic record resides in the database. The 'Return Step' feature is also available for additional reviewers who have at least a Level 1 in Personnel in the department that distributed the checklist.

FAQ: Can checklists be distributed to faculty and nurses?

No, the checklist feature is available only to someone with a Work Role of Resident and has an active Training Record.

FAQ: Why can't I edit a step on a checklist?

Once a step has been distributed to recipients, only certain details can be edited. They are:

- Name of the step
- Instructions
- Whether the recipient can mark it as complete
- If it is for Administrator use only
- Replace a file you had provided to assignees via Information Exchange
- Additional Reviewers
- Conditional Recipients
- Dependent Steps

Should you need to change other aspects of the step, you will need to delete the step and add a new one to replace it. Deleting the step will remove it from **any** distributed checklist, whether the step or the checklist was completed or not. **If the step required entry of information or an uploaded document from the recipient, it will be lost when deleted.**

Adding a new step to a distributed checklist automatically adds it to all existing recipients, even if the checklist was marked as completed.

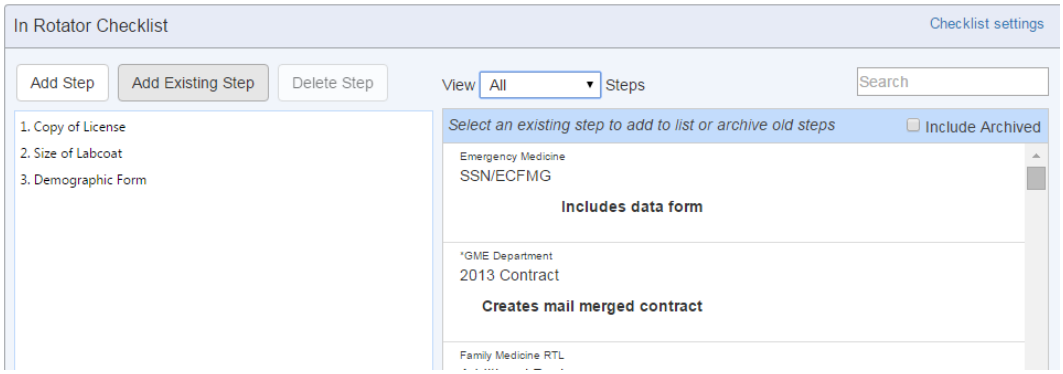
FAQ: What happens when I archive a checklist?

When you archive a checklist, you will be asked whether you want to also archive the distributed checklist or not.

- If you elect ***not*** to archive the distribution, archiving it will only remove it from the default view for administrators; however, it will still appear for recipients to complete.
- If you choose to archive it also for recipients, it will be removed from the default view for administrators ***and*** it will no longer be available for recipients to complete. Once archived for recipients, if the checklist is subsequently unarchived, it will ***not*** automatically be redistributed to those who formerly had it. You will need to manually redistribute it to those residents.

FAQ: What is a shared step?

The process of creating a checklist involves adding steps. You can add a new step, an existing step from your department, or an existing step from a different department. When you use a step that was created in a different department it is considered to be shared with you.

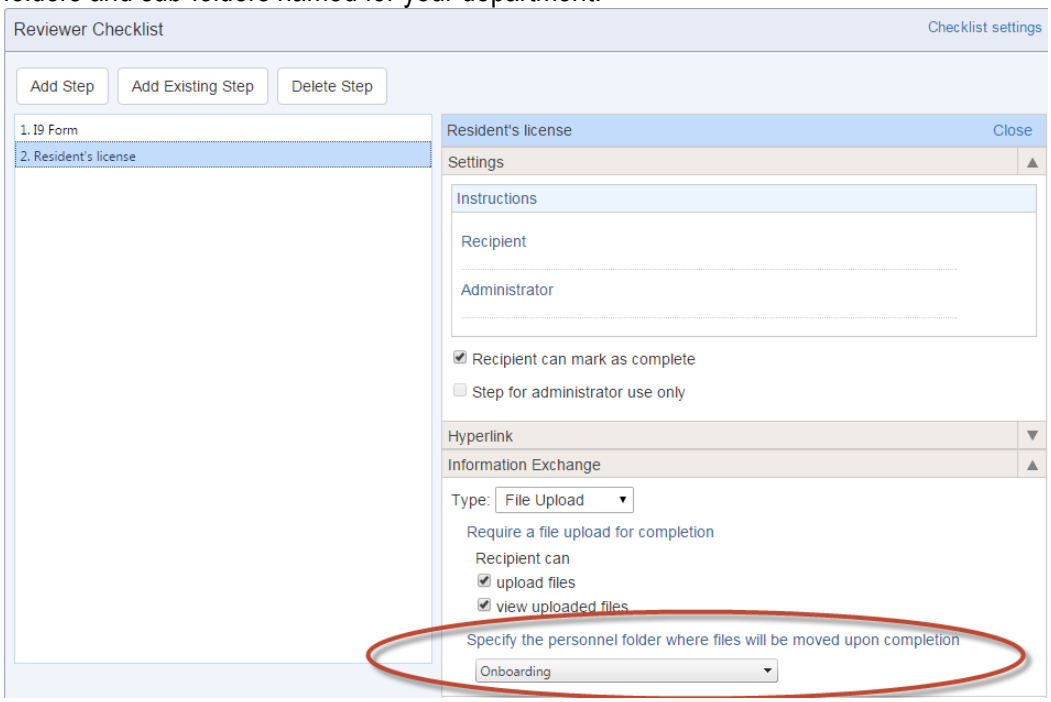


Once a step is shared, the department using the step is restricted in the changes that can be made to it. The following are the only changes that can be made for a shared step, and once made, will apply only to those recipients from your checklist:

- Whether the Recipient can mark it as complete, upload files, or view uploaded files
- The folder in Personnel where files are moved to when the step is completed
- The conditional step requirements, if conditional requirements were already configured for the step
- Additional Reviewers
- Dependent Steps

FAQ: Where can I find uploaded documents from a checklist?

When a step is created which requests the recipient to upload a document, the document is stored in their Personnel record under the Files & Notes tab in a folder named 'Checklist documents.' The sub-folders are named for the type of checklist (Onboarding, Advancement or Rotation). Checklist documents stay with the demographic record of the recipient, even if they move on to a different program in your database.
When building your checklist, as you add steps, you can designate a different folder than the default. We recommend that you don't place checklist documents in folders that don't move with the recipient, such as folders and sub-folders named for your department.



FAQ: On checklists, what's the limit for uploading documents?

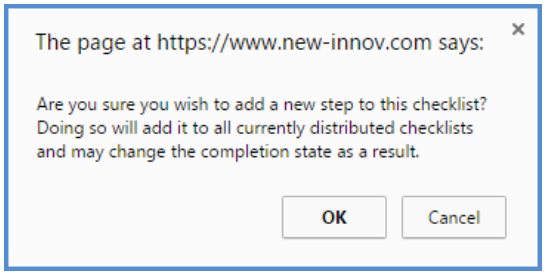
For GME/Programs:
In the Information Exchange section of a step, the GME/Program can provide only 1 document per step.
For Residents/Fellows:
A resident or fellow can upload a maximum of 5 documents.

FAQ: Can I add a step after the checklist has been distributed?

Yes, you can!

Add a Step

1. Go to *Personnel* > *Checklists* > *Onboarding, Advancement or Rotation*
2. Select the checklist
3. Click **Edit**
4. Click **Add Step**
5. Enter a Name and Instructions
6. Click **Add Step**
7. A pop-up screen will appear. (See below) Read it and click **OK**



Continue to build your step. The software will automatically add the new step to all distributed checklists.

Send a Custom Email

When you add a new step to a checklist that has been distributed, it will change any 'Completed' checklists to now display as 'Incomplete.' No automatic email is sent to residents when a new step has been added, so we recommend sending a Custom Email to your residents to let them know that a new step has been added.

1. Go to *Personnel* > *Checklists* > *Onboarding, Advancement or Rotator*
2. Click the **Progress** tab
3. Select the Checklist from the dropdown list
4. Check the boxes in front of each person's name
5. Click **Actions**, and choose **Send Custom Email**
6. Your default email provider will open
7. Create and send your custom email

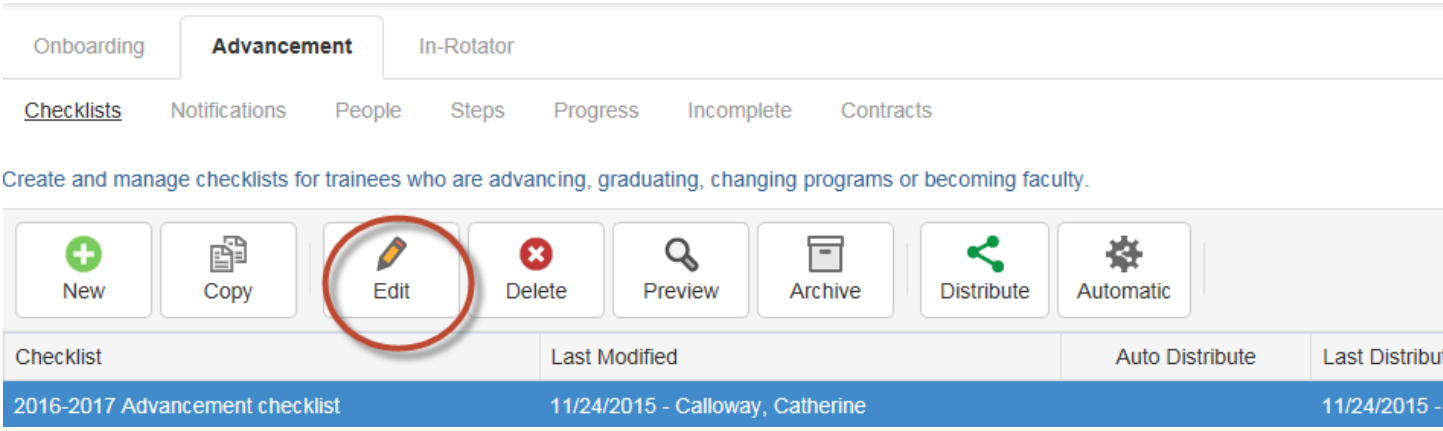
FAQ: Can administrators in other departments make changes to checklists applied to their residents from the GME office?

If a checklist is created in the GME department and is distributed to residents from various departments, the default settings permit the level 5 administrator in those departments to take the following actions:

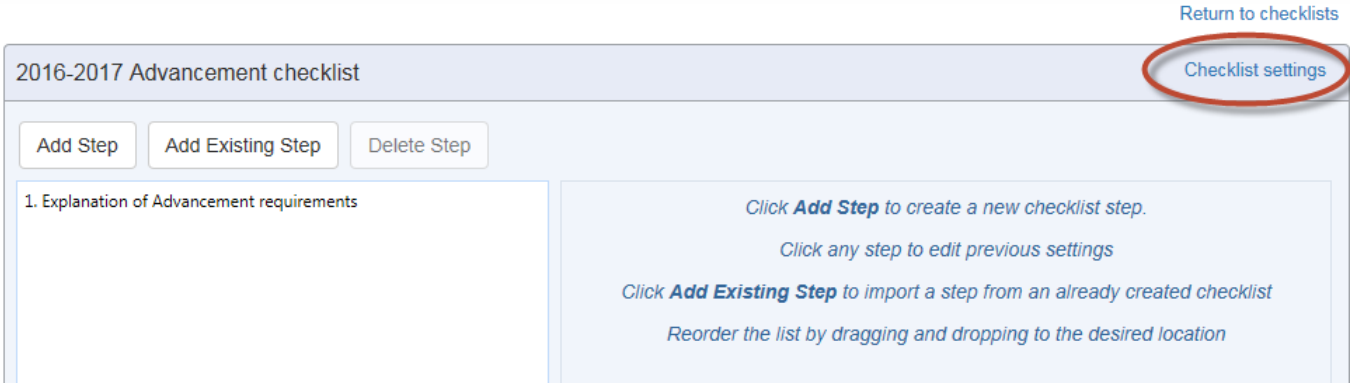
- Complete steps on behalf of their recipient(unless the step has additional reviewers)
- Modify whether a step is required by their recipient
- Delete the checklist from their recipient

Changes to these permissions can be made by a level 6 user by following these steps:

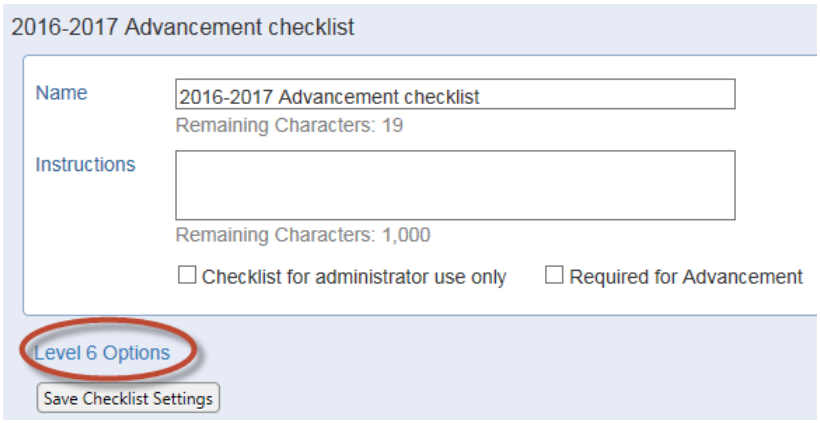
- Go to Personnel>Checklists> Onboarding , Advancement or Rotation
- Click on the name of the checklist
- Click **Edit**



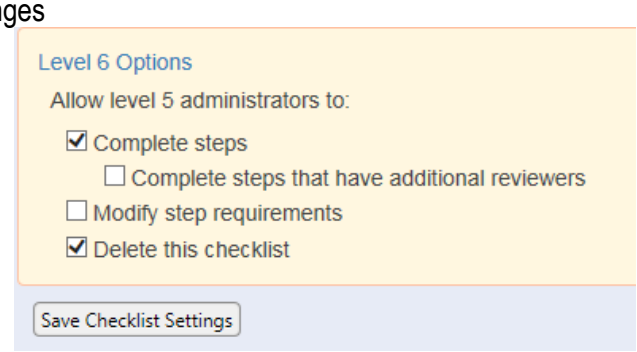
- Click **Checklist settings**



Click **Level 6 Options**



- Make desired changes



- Click **Save Checklist Settings**

FAQ: How many documents can be uploaded in one step?

The Information Exchange step allows checklist recipients to upload up to 5 documents. The recipient can upload documents to this step at any time until the checklist or the step is marked complete.

FAQ: If a coordinator returns a checklist Step to a resident, is the resident notified by email?

Yes, they get a notification via email indicating which step has been returned.

FAQ - Troubleshooting Off-Cycle Resident Contracts

How to handle off cycle or off-cycle and extended residents in contracts

1. Training record adjusted to show the correct dates
2. Check compensation status
3. Compensation rate – apply the one for the academic year in which the off-cycle year falls
   a. The payroll record created will have the academic year dates – not the off cycle dates
4. Go to the personnel record and adjust the payroll record for the individual
5. Distribute the contract via the checklist
   a. Keep the checklist on hold
6. Go to the checklist Contracts tab. Check the contract for the dates and compensation.

If the dates are not correct

7. Go to Personnel>Future contracts. Click Edit by the resident and adjust the dates for the resident.
8. Go back to the checklist Contract tab. Re-build the mail merge
9. Verify the information.
10. Release the checklist

FAQ: Where are the documents that were attached to forms? I can't see them anymore!

Once a document that was uploaded to a form step has been approved, it is moved to the person's Personnel file. It is no longer attached to the Checklist form.

FAQ: What does Track Progress mean on the Contracts page?

Track progress has to do with the E-Signature Premium Feature: it is used to track the progress of who has signed the contract during the e-signature process.

Contract steps that are not set up for E-Signature do not have the Track Progress option.