Monthly Periodic Checklists

Activity	Recommended Actions/Tools

1. Ensure that all resident and fellow time has been entered for the month, including:
 	
    ▪ <u>Work hours</u> (such as inpatient, OR, conferences, clinic, call assignments, etc.)
    ▪ <u>Time Away Short</u> (Vacation/sick leave or other time that is less than or equal to 50% of the length of a rotation)
    ▪ <u>Time Away Long</u> (Vacation/sick leave or other time that is greater than 50% of the length of a rotation)
	Review the Work Hours Usage Report
	
	1. From the top menu ribbon, click **Work Hours,** then **Reports**.
	2. Under *Usage*, select **Usage Summary.**
	3. Deselect **Exclude Vacation/Leave hours from total** and **View Report**.
	4. Review individual residents' duty hours or calendars.
	Look for:
	● Low hourly totals (<160 per month, or appropriate hours for your program)
	● Gaps of >2 days for which time needs to be logged
	● Unapproved hours

2. Review schedules for any time away that will extend training (leaves of absence, FMLA, etc.).
 	
    ▪ Add the **MMCGME – Time Away Extends** rotation to the block schedule for any resident who falls into this category.
    ▪ Fill out Time Away Extends form on RMS home age or send in program Time Away Extends form that includes:
        o Exact dates of the period of time that will extend training
        o New End Date for the program
	❑ Edit the block schedule to add MMCGME – Time Away Extends rotation to resident's block schedule. From the top menu ribbon, select **Schedules**, in the *Block Scheduling* box, click **Schedule Rotations**.
	    1. Select the Person and Academic Year from the dropdown menus.
	    2. Scroll down to the list of Rotation Intervals and check those you need to edit. Then click the **Edit** link.
	    3. To create a split block rotation within a selected interval, change the existing start/end dates to create a "gap" in the schedule. Add the new rotation information to the created gap.
	    4. Edit the Rotation Intervals. Click **SAVE** at the bottom of the screen.

3. Run a **Block Gap Locator Report** to check for scheduling gaps. Ensure rotations are listed as primary and that there are no unspecified rotations (rotations without a name). There should be no gaps for any previous months through the upcoming month.
 	
Use **MMCGME Rotations** for situations where the resident fellow is:
    ▪ Starting the program late
    ▪ Graduating early
    ▪ On a leave that will extend training
    ▪ In Orientation
	If any gaps appear for previous months through the upcoming month, adjust the rotation so that there are no dates within the Academic year that are not covered by a rotation.
	
	Gap Locator Report:
	From the top menu ribbon, click **Schedules**, in the *Block Scheduling* box, under the *IRIS Tools* list, click **Gap Locator.**
	
	Block Schedule Checklist: MMCGME Services will run a monthly Block Schedule Report and contact programs if revisions are required.

Monthly Periodic Checklists

MONTHLY -- By the last working day of each month

Activity	Recommended Actions/Tools

4. Review life events for residents/fellows including:
 	
    ▪ Off-cycle graduations
    ▪ Terminations/resignations from the program
    ▪ New hires
    ▪ Name changes
 	
5. Provide the appropriate documentation to MMCGME.
	<u>Required Documentation</u>: Copies must be sent to MMCGME within one month after the resident begins the program.
	▪ <u>Graduations</u>: Completion Certificate/Termination Form with graduation date listed
	▪ <u>Terminations/Resignations</u>: Termination Form with last date in program and Completion Certificate
	▪ <u>New Hires</u>: Provide the following information:
	    • First, middle, last name
	    • Program name
	    • Program start and end dates
	    • Previous program information
	    • Medical school name and graduation date
	▪ <u>Name Changes</u>: Provide proof of the change (e.g., copy of new Social Security Card or Marriage License)

All resident/fellow time for the previous month must be entered and approved by the 5th working day of the new month.

Annual Periodic Checklists

ANNUALLY -- By August 1st or one month after resident/fellow BEGINS a program

Activity	Recommended Actions/Tools
Ensure that copies of the following reimbursement and audit-related documents for all residents/fellows are on file with MMCGME Services: ▪ RMS Data Form ▪ Medical School Diploma ▪ Copies of all certificates for prior completed GME programs ▪ Contract/Residency Agreement ▪ ECFMG Certificate (for graduates of foreign medical schools)	❑ Submit required documents to MMCGME Services to: MMCGMEHelp@umn.edu **Campus Mail:** MMCGME Services Delivery Code MMC 293 **U.S. Mail:** MMCGME Services 420 Delaware St SE, MMC 293 Minneapolis MN 55455

Annual Periodic Checklists

ANNUALLY -- By August 1st or one month after resident/fellow FINISHES a program

Activity	Recommended Actions/Tools
Ensure that copies of the following audit-related documents for all residents/fellows are on file with MMCGME Services: ▪ Residency/Fellowship Completion Certificate (after program completion) ▪ Termination/Resignation Form ▪ Time Away Extends Documentation (if program was extended due to time away)	❑ Submit required documents to MMCGME Services to: MMCGMEHelp@umn.edu **Campus Mail:** MMCGME Services Delivery Code MMC 293 **U.S. Mail:** MMCGME Services 420 Delaware St SE, MMC 293 Minneapolis MN 55455

Annual Periodic Checklists

ANNUALLY -- By August 1st or one month after resident/fellow BEGINS a program

Activity	Recommended Actions/Tools

ANNUALLY -- Every June or at least one month BEFORE a resident/fellow begins training

Activity	Recommended Actions/Tools
1. Create an academic year for your residents/fellows, and add intervals for each block rotation.	**Steps to Create Academic Year and Add Intervals** ❑ From the top Menu ribbon, select **Administration > Software Setup > Academic Years** (Under Local Setup). ❑ Click **New**. ❑ Enter a name for the Academic Year and set the date range. ❑ Select the number of intervals that will compose your Academic Year, rename the intervals and edit the interval dates if necessary. (One Academic Year may include as many as 53 intervals.) ❑ Click the **Save** link at the bottom of the screen.

2. Create a block schedule for each resident/fellow.	**Steps to Create Block Schedule**
	❑ Select **Schedules** from the top Menu ribbon.
	❑ In the *Block Scheduling* box, click **Schedule Rotations.**
	❑ Select a person from the **Person** drop-down box. Check the **Include Archive People** checkbox, if desired.
	❑ Then select an **Academic Year** from the Academic Year drop-down box. You may only create rotations for the selected Academic Year.
	❑ Next, select one of the three options for building a Block Schedule for the selected individual.
	❑ Verify that the following fields are correct:
	  • Start and End Date
	  • Person Status
	  • Home Department
	  • Program
	  • Post Graduate Year
	❑ Select a Rotation from the list that will be assigned to this interval.
	❑ Click **SAVE** at the bottom of the page.
	❑ Repeat these steps to build each resident/fellow's block schedule.