Best Practices and Guide for Hospital Onboarding

Hospital Onboarding Best Practice Recommendations

These best practice recommendations are in use by some MMCGME hospitals and are put forth by the MMCGME Operations Committee after careful consideration and review by the Hospital Onboarding Workgroup. The best practice recommendations are intended to promote collaboration between sites and programs in an effort to reduce duplicative tasks and administrative time for the residents and fellows as they rotate through MMCGME institutions, and ensure accountability and strong communication to key stakeholders to establish consistency through the consortium while allowing for customization to meet the varying requirements.

Program Recommendations

- Programs: Ensure that 100% of trainee data and documentation is entered and up to date in RMS one month before the academic year begins. Many institutions rely on this information for onboarding your trainees to their organization. Missing or inaccurate data can potentially delay a trainee's ability to begin training on time.
- Programs: Ensure that block schedules are entered into RMS in a timely manner and updated in real time. Note: Many sites run RMS block schedule reports monthly, bi-monthly or quarterly to inform them of which trainees to onboard (set up EMR access, configure building access, etc.). MMCGME expects that programs will meet each sites needs with regard to how much advanced notice is required.
- Programs: Try to limit the option for residents to change/swap rotations with an exception for family or medical leave.
- Program: Notify site directly of any last minute block schedule changes. (Last minute is defined as one month before the rotation start, with the exception of the VA which requires 60 day notice.)
- Program: Share rotation specific resources with trainees detailing information such as general onboarding requirements,maps, site contacts, etc.   The hospital specific trainee information page on the MMCGME website is a great resource to include in your materials.
- Program: Education faculty on the impact of changing rotation experiences/locations on the fly. If last minute changes to rotation location is unavoidable, teach faculty who must be notified to ensure a smooth onboarding experience.
- Program: Regularly audit rotations to ensure that the locations are up to date.

Site Recommendations

- Sites: Run RMS Custom Report to identify incoming residents/fellows. Contact MMCGME Services for assistance at RMSHelp@umn.edu
- Sites: Onboard trainees to the institution for the full academic year whenever possible. This eliminates the need for trainees to repeat any onboarding processes for the year if they return for more than one rotation.
- Sites: Do not set up hospital/site access, parking, and/or food money until all onboarding component are complete. Several MMCGME institutions do this as a way to encourage timely completion of requirements.
- Sites: If trainees show up to a site on their first day without completing the onboarding requirements, send them home until compliant. Or, at a minimum, do not allow them to join their team/start rounding until all requirements are complete. Several MMCGME institutions do this as a way to set a precedent and ensure compliance with institutional requirements.
- Sites: Use RMS Checklists to share onboarding requirements and track compliance

Home Program & Site Combined Recommendations

- Site & Program (**shared effort**): share general logistical information with trainees in advance of each rotation (department location within site, parking, hospital access, onboarding requirements)
- Site & Program (**shared effort**): Explore opportunities for longitudinal experiences which will ease administrative onboarding requirements (among other benefits).
- Site & Program (**shared effort**): In an effort to avoid duplication and ensure that the trainees receive timely reminders, work together in developing processes for reminding trainees of site-specific items:
    - Onboarding requirements & completion deadlines
    - Maps
    - Parking logistics
    - Where to go on the first day
    - What to bring on the first day
    - Site contacts
    - Etc
- Site & Program (**shared effort**): Work together to establish a clear process for communication which trainees will be rotating to the site and when. See the best practice recommendation to run RMS custom reports (instructions below) or develop a process that works for both the site and program. Programs and sites are encouraged to use the RMS block schedule and custom reports as the primary method by which this information is shared as establishing a single process for all participating programs and sites will greatly reduce administrative burden for all parties.

RMS Custom Reports

MMCGME Services can provide institutions with a custom report that details which trainees have scheduled RMS rotations at their site. The report details:

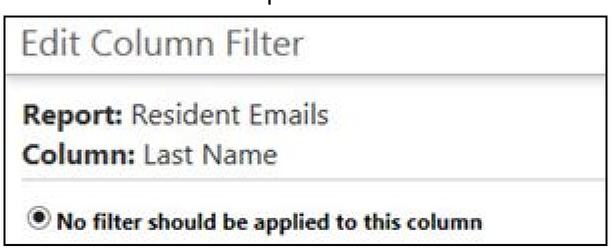
- Trainee Name (First, Middle, Last)
- Sending Program
- Rotation start and end dates
- Trainee credentials
- Trainee Status (RL1, FL1, etc.)
- Trainee email address
- Trainee pager number
- And more (the report is customizable to include other information as necessary)

The custom report pull trainee information based on the abbreviation for the specific location being included in the rotation name assigned to the trainee for the time period indicated the report filters. Custom report filters are customizable. See below instructions on filtering custom reports. MMCGME Services will configure the report so that you should only have to change the start date filter with each use. If you are not getting the trainees you expect to see contact rmshelp@umn.edu and MMCGME Services will update your RMS access to ensure you are able to view results for all programs rotating to your institution. If you need additional columns added to your custom report contact lisag@umn.edu.

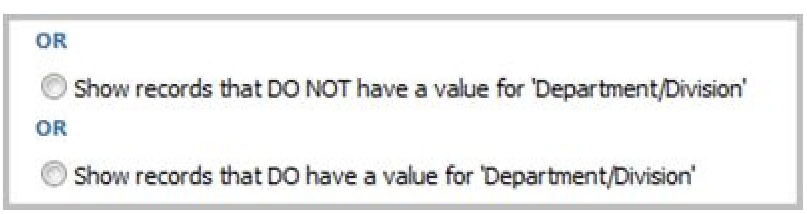
Filter Custom Reports

Columns can be filtered in a variety of ways to restrict the data that is returned. For example, you can filter the Status column to display information about first year residents only. Click Filter beside any column to see the following filter options that are available:

- **No filter** - Select this option to remove a filter setting for the column.

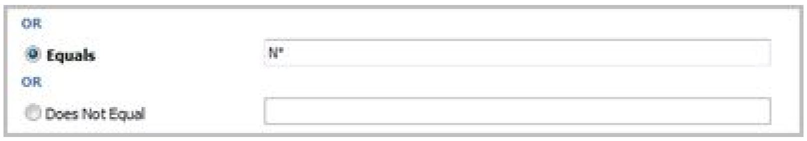


- **Value Validation** - Select the appropriate option to display records that **do or do not** have a value entered in the data field for this column.

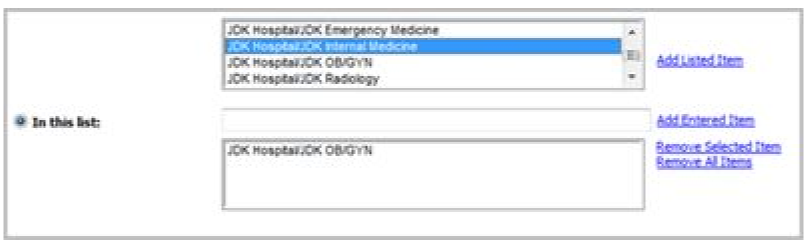


- **Date** - This column filter is used for date sensitive columns. Select an action from the dropdown list and enter appropriate date parameters.

- **Equals or Does Not Equal** - Enter a value or use a wild card character (*). The example shown below would return any item that starts with the letter 'N.'



- **In this list** - Highlight the items you want to include in the filter and click **Add Selected Item**. The item(s) will then appear in the bottom box.

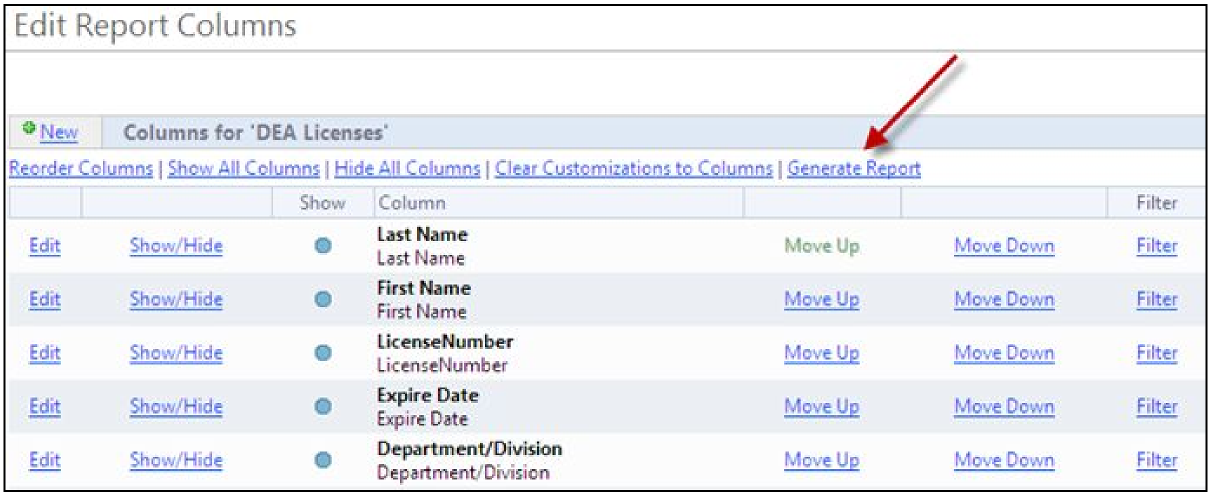


- Click **Save Filter.** The Filter link will now appear in bold on the Edit Report Columns page.

Generate a Custom Report

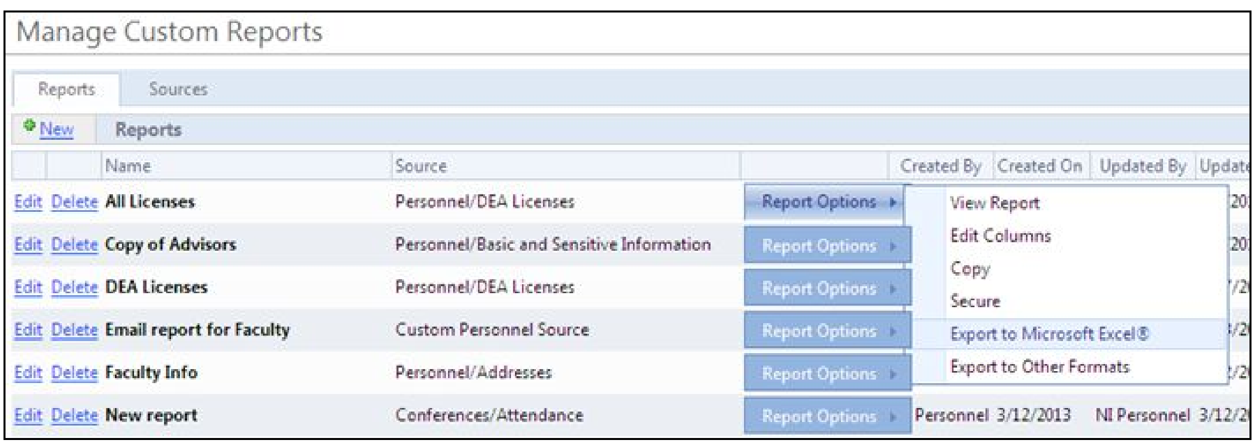
Generate a report from the Edit Report Columns page:

1. Click **Generate Report** from the top of the column filtering page
2. Choose the method for generating a custom report
    - **Microsoft Excel spreadsheet**
    - **Sortable table in a new browser window** displays the report in a popup window
    - **Tab-delimited text file** allows the report to be opened with another program



You can also generate a custom report from the list of custom reports:

1. Go to *More > Custom Reports*
2. Find your report in the list and click **Report Options**
3. Select one of the following:
    - View Report - Generates the report
    - Edit Columns - Allows you to edit the filters and columns of your report
    - Copy - Copy the report
    - Secure - Configure the security for this report
    - Export to Microsoft Excel - Export to Excel file
    - Export to Other Formats - Export to Excel, sortable table or tab-delimited text file



RMS Checklists

Creating Checklists

1. Start fresh with new steps and new checklists each year. That way you are not carrying forward possibly steps with issues
2. Include clear instructions for each Onboarding checklist step so that trainees know exactly how to proceed
3. Put the year in your checklist so you can determine easily identify the checklist
4. Label steps with a reference to the host hospital or program so if someone has a question they know who to reach out to
5. Make sure you are not have the trainees mark steps as complete if they have to upload something
6. Direct uploaded documents to the correct hospital folder under onboarding or advancing
7. Try not to ask for documents that are already in RMS or collected in anther checklist
8. Double check that provided files upload successfully before distributing the checklist
9. Ensure that unique steps are accurately applied to program(s)

Distributing Checklists

1. Set up reminder notifications so that trainee is notified by email to complete their checklist
2. Distribute the checklist 1-2 months before the selected due date to give the trainee enough time to complete it
3. Ensure that you are selecting all of the programs that you want to receive the checklist

Managing Checklists

1. Log in periodically and accept any documents you asked the trainee to upload or sent the step back to the trainee to try again.
2. Ongoing monitor steps that are pending or incomplete
3. If trainee cannot get a diploma by the due date, make sure to follow up with the trainee and ensure that this gets uploaded