2023

New Innovations Preparing for the New Academic Year

MMCGME

Metro MN Council on Graduate Medical Education

Rev. 02/2023

CONTENTS

PREPARE FOR THE NEW ACADEMIC YEAR

There are a few tasks that have to be completed in the software before the beginning of the new academic year. Use this guide to make sure your New Innovations software is ready. This is also a good time to check some basic configurations to make sure they are in line with new program or hospital policies.

HOME PAGE

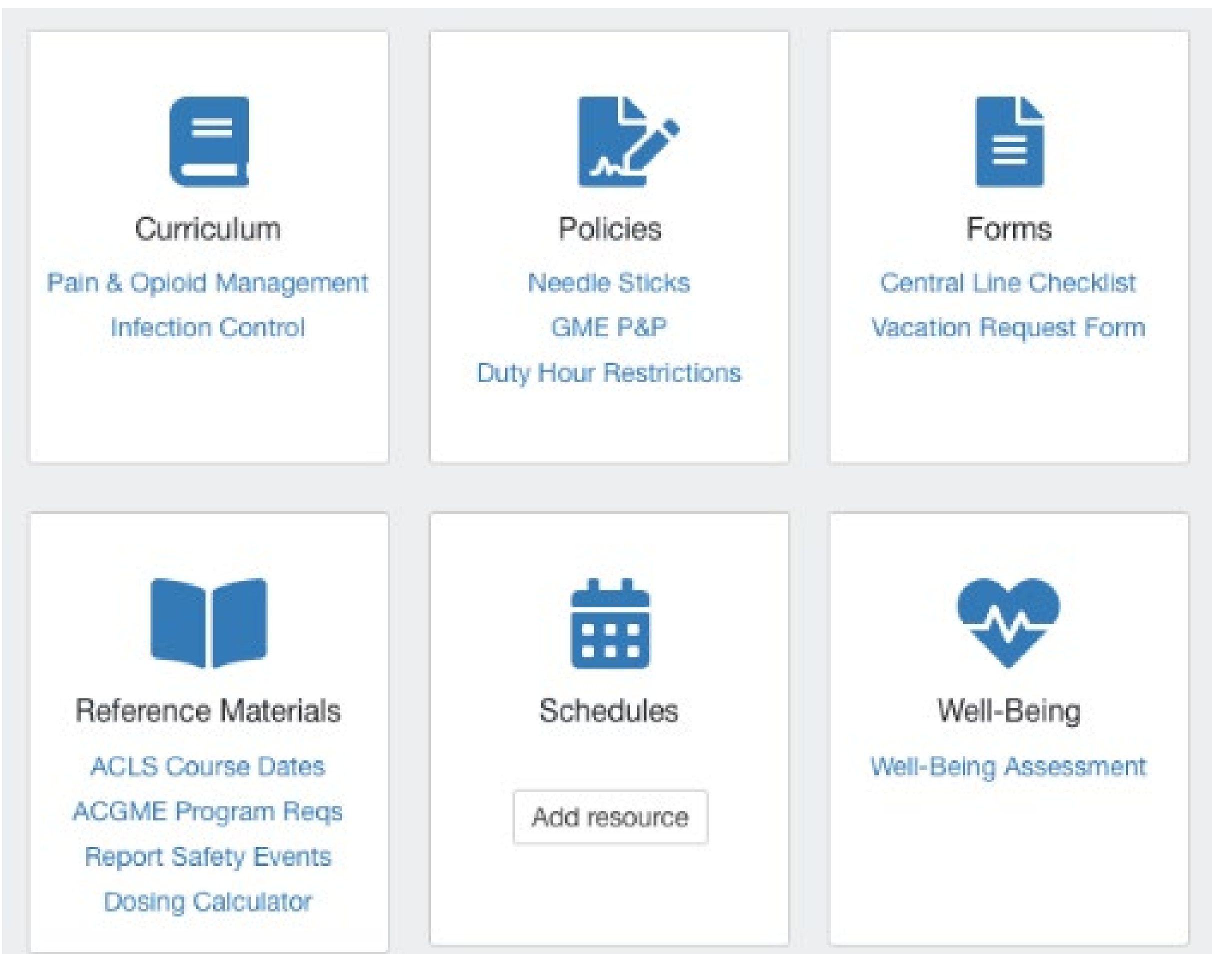
Review and update documents in the buckets if applicable.

ADDING HOME PAGE RESOURCES

REVISE AND UPLOAD NEW DOCUMENTS ON HOME PAGE

The home page resource panel helps you organize your residency documents for your learners and faculty.

- Each category shows up to five resource links and a See All link if there's more
- A category only appears to learners and faculty if you've added resources to that category



Recommended Uses
Forms - use for forms your learners need for leave, vacation or other requests
Schedules - include schedules from other applications outside of New Innovations. This might include a call spreadsheet developed in Excel
Well-Being - documents for learners relating to Well-being initiatives in your hospital or program
Reference Materials - Items from the Department Manuals section you want available on the home page
Policies - Policies from the Administration module you want to share on the home page
Curriculum - upload curriculum documents that you want distributed outside of the Curriculum module

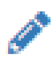
Add a Resource
For Forms, Schedules, Well-Being, Policies, Reference Materials:
Load resources to Department Manuals

For example, consider adding a link to learner + faculty help:

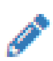
1. Go to More > Resources > Department Manuals
2. Select the Link radio button
3. Paste this: https://gme-support.new-innov.com/support/solutions/folders/5000302637 into the URL field
4. Enter a display name like "Click here for Learner and Faculty Help"
5. In the ‘Share with these departments,’ your department is already selected. You may select any departments where you have privileges

For Curriculum:
Go to Schedules >Curriculum > Course Materials and upload course materials.
Once the document is uploaded, it will be available to be added to the Curriculum panel

Add Link to Resource Panel

1. Open the home page
2. Decide which panel should hold the resource
3. Click Add resource or the  on that panel
4. If you're in the Curriculum panel, you can click between a Curriculum tab and a Department Manuals tab to see documents in either location. Other panels only see the Department Manuals tab
5. Click to checkmark any document you want in this panel.
   Uncheck any checked document to remove it from the panel.
6. Click Done

Remove Resource

1. Click the  on any panel
2. Find the resource you want to remove
3. Click Remove in the Actions column

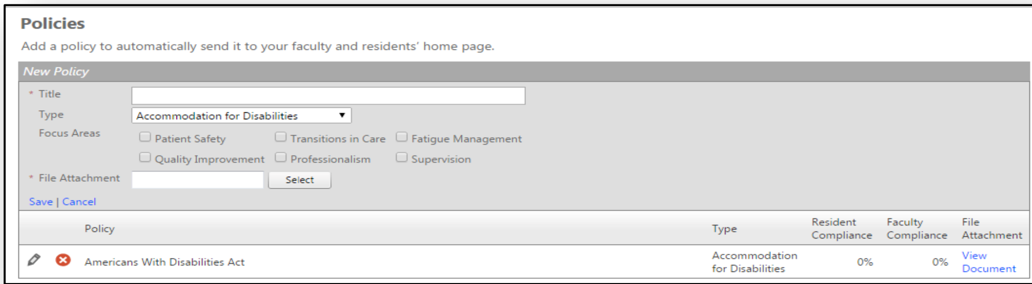
Name	Folder	Type	Size (KB)	Owning Department
Forms	●	Folder	N/A	FM-Family Medicine
Policies and Procedures	●	Folder	N/A	FM-Family Medicine
Evaluation Sessions Manual		.doc	379	FM-Family Medicine
Procedure Logger Manual		.doc	759	FM-Family Medicine

UPDATE POLICIES

Why is this important?

- Policies change from year to year. Make sure you have the latest version of each document

  Update in **Administration**>**Program**>**Policies**



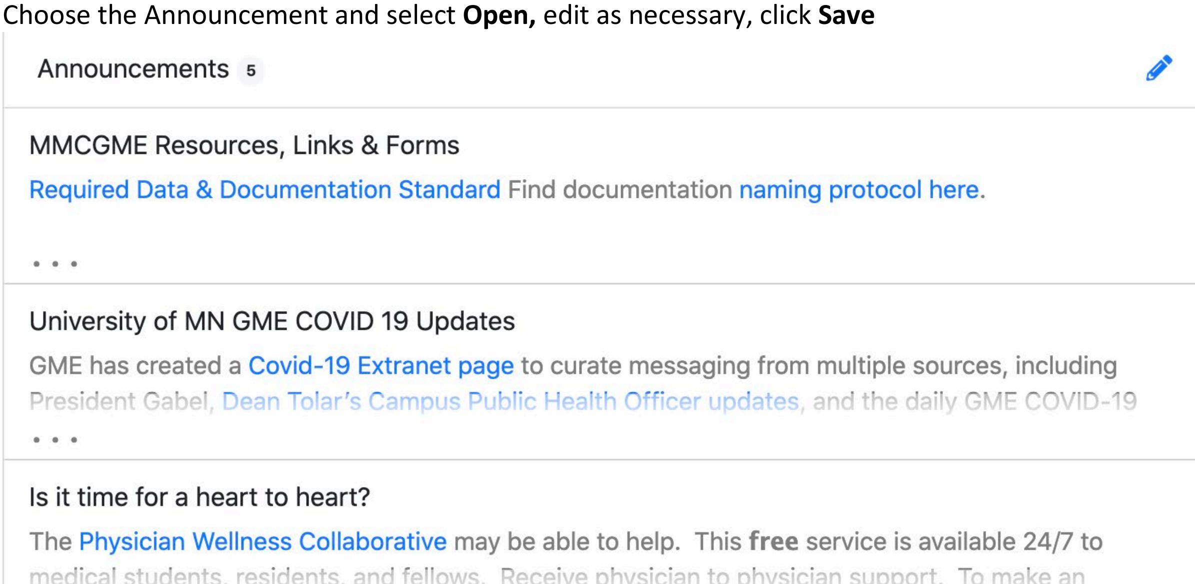
DEPARTMENT ANNOUNCEMENTS

REVISE AND UPDATE DEPARTMENT NOTICES

Why is this important?

- Information contained in department notices may change or become outdated from year to year

Update by going to the home screen (> Scroll to Announcements>)
Choose the Announcement and select **Open,** edit as necessary, click **Save**



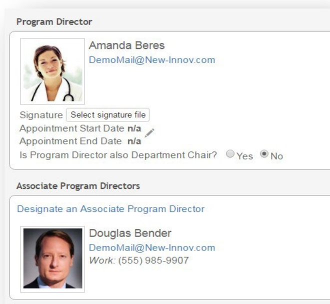
ADMINISTRATION MODULE

Designating a Program Director and Program Coordinator is done through MMCGME Services. For University of Minnesota Programs, please see the link below for the correct procedure. For Non-UMN Programs, please contact MMCGME Services at mmcgmehelp@umn.edu for changes to the PD or PC. For UMN Programs, please make sure you follow UMN policy.

DESIGNATE PROGRAM DIRECTOR AND ASSOCIATE PROGRAM DIRECTOR

Why is this important?

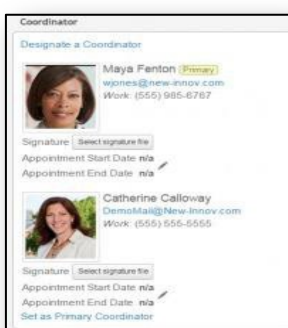
- Those listed in the Personnel section of your Program Configuration receive emails and alerts from various modules, such as:
  - Duty Hours Alerts to violations and justifications,
  - Evaluations: view PD confidential comments
  - Portfolio Reviews: configure format for PD review, view forms, leave comments, alerts to actions on the form



DESIGNATE PROGRAM COORDINATOR

Why is this important?

- Person designated as your Program Coordinator will receive emails and alerts from various modules, such as:
  - Duty Hours: Alerts to violations and justifications
  - APE: view forms, leave comments, alerts to action on the form
- Some programs have more than one PC. You may add as many PCs to a program as necessary and designate the one to receive emails



DESIGNATE CORE FACULTY AND COMMITTEE MEMBERS

Why is this important?
On the Faculty tab, designate the faculty members who are 'Core' faculty and which faculty members serve on various committees, such as the Program Evaluation Committee (PEC) and the Clinical Competency Committee (CCC).

Core Faculty

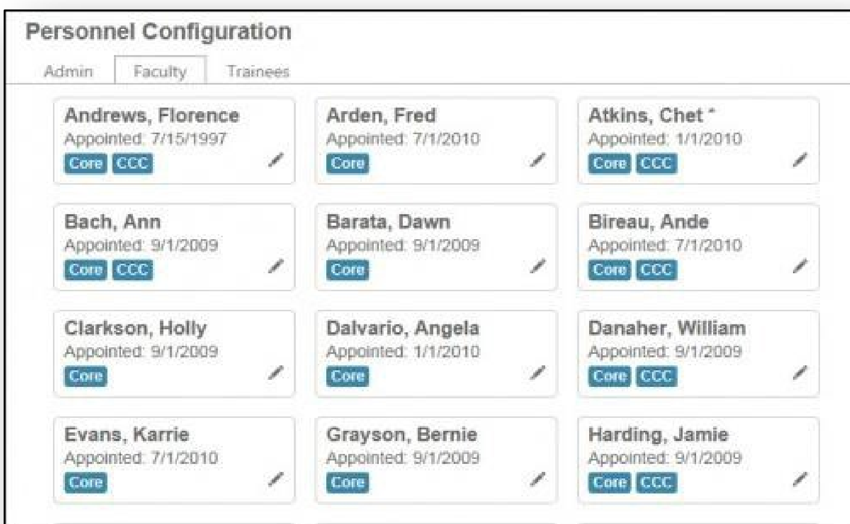
- It is important for faculty members in your program to have an appointment date in their record. Appointment dates are used for:
    - CLER reporting - Giving a person the Core Faculty designation includes them in accreditation statistics (CLER), such as Attrition reporting in Key Metrics
    - Evaluation Reporting – These designations will group your faculty as Core Faculty, Department Faculty, Outside Faculty, etc. in the Evaluation Reports

Program Evaluation Committee (PEC)

- Annual Program Evaluations (APE) - Make the appointment date before the start of the review period
- If you are giving a faculty from another program an appointment in your program to include them on your PEC, **do not** designate them as CCC or Core Faculty. Doing so will skew your accreditation statistics.

Clinical Competency Committee (CCC)

- Give a person the CCC designation to grant them permission to view and edit the Milestone Reviews
- Make the appointment date before the start of the 6-month review period



Add the Clinical Competency Committee (CCC)

There are two ways to designate the CCC, either through the Administration module or the Personnel Profile.

Through the Administration Module

1. Go to ***Administration*** > ***Program***
2. Click *Personnel > Faculty tab*
3. Click **Add Faculty**
4. Select faculty members who should be on the Clinical Competency Committee
5. Enter the date appointed. It is important that the date appointed be entered so that this faculty member will be included in statistics on the Sponsor and Program Administration pages. When the statistics are calculated for the widgets on those paged, the system uses the appointment date as the starting point and today's date as the end point.
6. Check the box to indicate that they serve on the CCC
7. Click **Add Faculty**

Through the Personnel Module

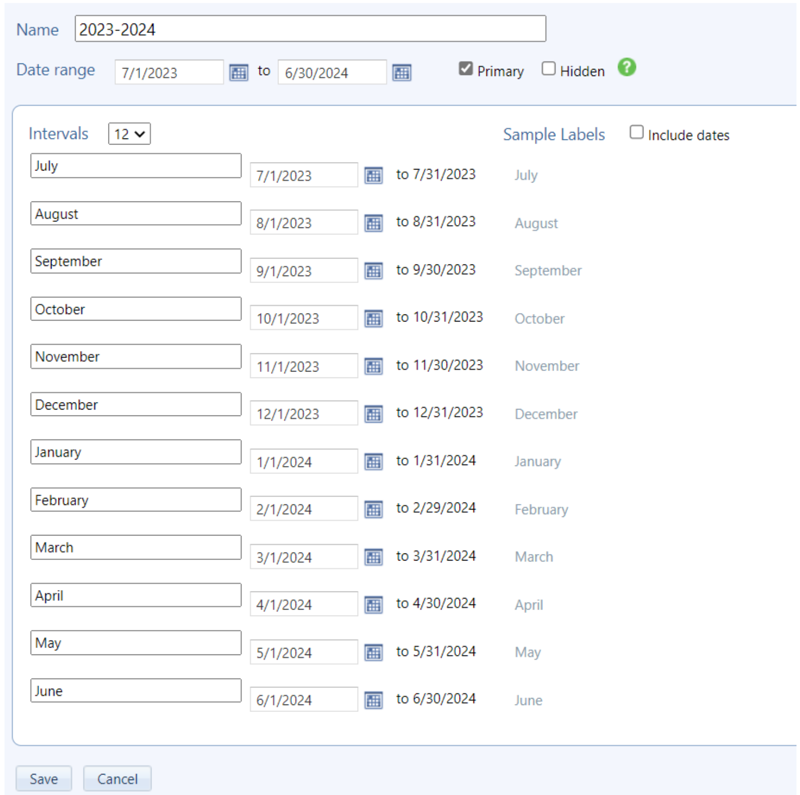
1. Go to ***Personnel*** > ***Personnel Records***
2. Select the faculty member's name from the dropdown list. Consider filtering your personnel list by the faculty work role to limit the list to faculty only.
3. In the Other section, click *Faculty Appointments*
4. Click **New**
5. Select the program and enter the date appointed. It is important that the date appointed be entered so that this faculty member will be included in statistics on the Sponsor and Program Administration pages. When the statistics are calculated for the widgets on those paged, the system uses the appointment date as the starting point and today's date as the end point.
6. Check Core Faculty and CCC if this person will be doing Milestone reviews on residents in this program
7. Click **Save and Return**.

CREATE A NEW ACADEMIC YEAR

Why is this important?

The academic year is an integral piece of the software because it is used to define specific time periods for:

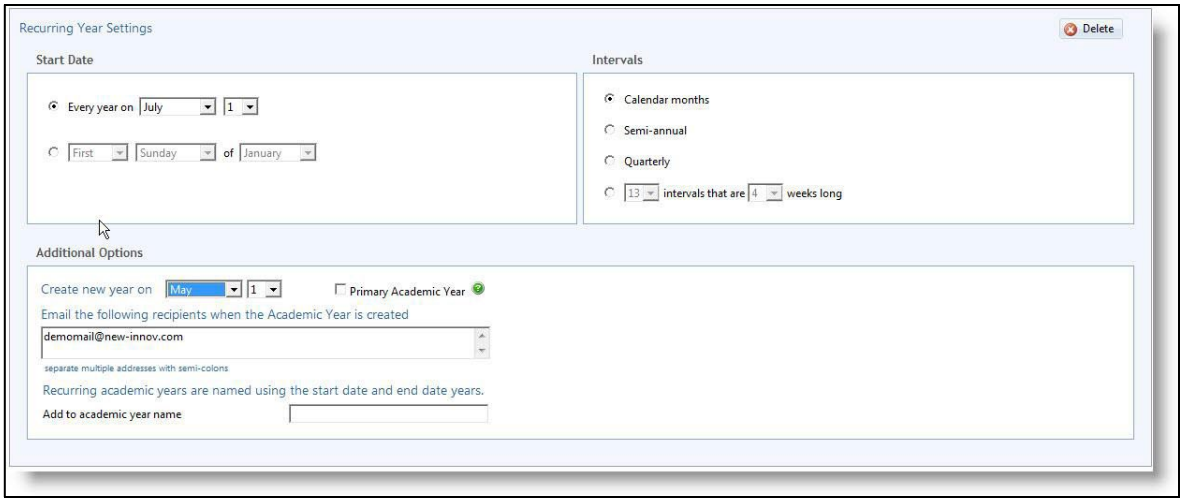
- Block schedule intervals
- Assignment (daily and call) schedule intervals
- Evaluation distribution schedules
- Duty hour rule checking
- Finance applications



1. Go to ***Administration*** > ***Software Setup*** > ***Local Setup*** > ***Academic Years***
2. Click **New**
3. Enter new academic year name in the text box
4. Enter the start and end dates of the Academic Year
5. Choices for Primary and Hidden
    a. Primary years appear first in dropdown lists and are used in Duty Hour signoff
    b. Hidden years do not appear in lists except in the block schedule for administrators
6. Select the number of intervals for the year
7. Check 'Include dates' to make the interval dates appear in the interval label
8. Edit the new interval names and start/end dates as necessary. If you change the dates, the interval name will update accordingly.
9. Click **Save**

CREATE A RECURRING ACADEMIC YEAR

Why is this important?
Having the academic year automatically created ensures that functions such as duty hour rule checking and evaluation distribution will continue from year to year without interruption.



1. Go to ***Administration*** > ***Software Setup*** > ***Local Setup*** > ***Academic Years*** > ***Recurring*** *tab*
2. Click **New**
3. Select the start date of the recurring pattern for your academic year
4. Select how many intervals to use
5. Select when the system should create the new year
6. Your email address is entered for you so you can receive an email when the new year is created. Enter other people's addresses if they should be notified too.
7. Each time a new year is created it is named using the start and end date year. If you want something additional added to the year, enter it in the text box. An example would be 'PRG-1'. When the new year is created it will display as '2016-2017 PRG-1'.
8. Click **Save**

Each resident and fellow must have a Personnel record so they can complete evaluations, log procedures, log duty hours and more. We recommend that each person has only one record within your database.

Contact MMCGME Services to add new residents and fellows to RMS using one of the two following processes (some programs follow both processes). **New resident/fellow information must be received by March 31;** however, you may also send it earlier.

ERAS IMPORT

Why is this important?

- Automatically imports new resident records from the AAMC's ERAS website
- Creates Training Records within each resident or fellow Personnel file
- Imports IRIS data for reimbursement

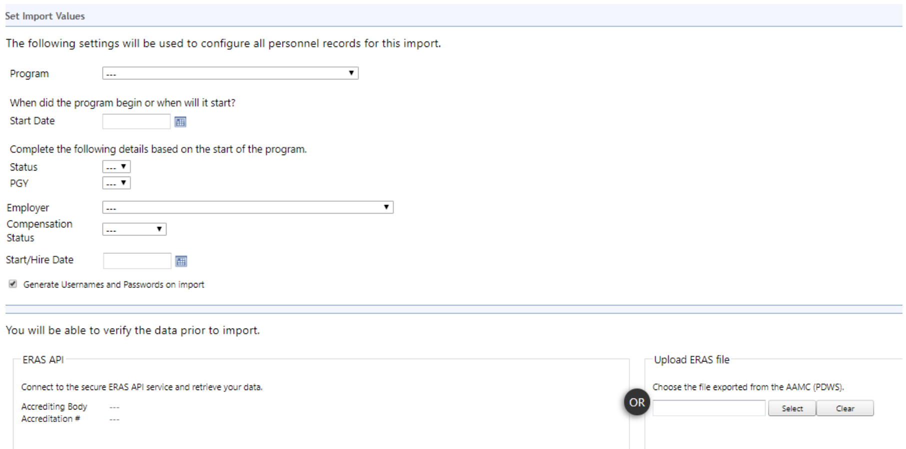
Step #1: Marking Trainee as Will Start

1. Log into your program(s) ERAS account
2. Click on the "Applications" tab; and then the View Current Results" tab
3. Check the box next to the names of the trainee who have matched to your program
4. Scroll to the bottom of the list and click on the drop down: "action to perform on selected applicants"
5. From the drop down, choose "Update Status" and click "Go"
6. Under the "Application" section; check the "Will Start" column
7. Click "Apply"

Step #2: Download ERAS file using API

Login into New Innovations and navigate from Personnel>Tools>Import ERAS Data

1. Choose the appropriate program from the dropdown box
2. Leave the box checked for Initial Program
3. The status type is entered for you based on the program status mapping.
4. The start date is entered for you based on the advancement section in the program. If the start date is different than indicated please let me know.
5. The Post Graduate Year defaults to 1. Leave it at 1 if most people you're importing have that PGY
6. Select the employer from the dropdown list. Make sure if the employer is different that you are updating the employer. Let MMCGME know if you do not see your employer in the drop down list.
7. Enter the start/hire date. This should be the same date as the program start date
8. Keep the box checked to have the computer create a **Username and Password** on import



9. Select **Connect to API**

10. **Click Connect to API**
11. **Click Continue**
12. **The names of the people you selected from ERAS appear on this page.**
13. **Reconcile any discrepancies- match any medical schools instructions below**
14. **Click Continue**

Matching Medical Schools (if necessary)

Medical School names must match exactly. If ERAS Medical Schools do not match exactly to a medical school in the RMS medical school list, the person will still be imported and a Training Record for their Residency/Fellowship will be created. However, the Education record listing the Medical School will not be created for that person. To match the Medical Schools during the process:

1. Select the appropriate medical school from the dropdown lists
2. Click on **Match Medical Schools** at the bottom of the page
3. Check the box for all those people to import. Check for possible duplicate at the bottom of this screen. See notes below.
4. Click **Continue** to import the data to the Personnel module

MANUALLY ADD RESIDENTS

If the program does not use ERAS, new residents and fellows must be manually added to RMS detailed below:

1. Enter the information from the manual spreadsheet that was provided to you, and return the completed form via a secure email server.
2. MMCGME Services manually enters the information into New Innovations to create the personnel data record.
3. MMCGME Services will email the coordinator or program representative to inform them that their users have been entered into New Innovations.
4. Programs are encouraged to begin gathering required documentation and building block schedules in RMS for the residents/fellows.
5. MMCGME Services will follow up with the programs if there is missing IRIS information.

Process for University of Minnesota programs:

For UMN Programs, the trainees will enter their information into the Data Exchange. The manual spreadsheet cannot be accepted.

CHECK FACULTY RECORDS

Why is this important?

Keep faculty members' records up to date. Add new faculty and archive those who have left or retired. Reduce size and efficiency of selection lists. You can also find the links to these forms on RMS Home Page.

- To add new faculty or to request faculty to be archived, complete the form on the MMCGME Services website.

CHECKLISTS

Checklists can contain steps for recipients to view links to training videos or have them download and upload documents.

CREATE ONBOARDING CHECKLISTS

Why is this important?

Onboarding checklist can be distributed to people with the status of 'Incoming Resident', 'Incoming Fellow and trainees that are changing programs.' These are the statuses given to people before they are considered a first year in either a residency or fellowship. If you wait until after the residents or fellows start in their program, the onboarding checklists will not be available for you to send.

Onboarding checklists help you collect information and documents for new hires, such as tax forms, transcripts, licenses, benefits, etc.

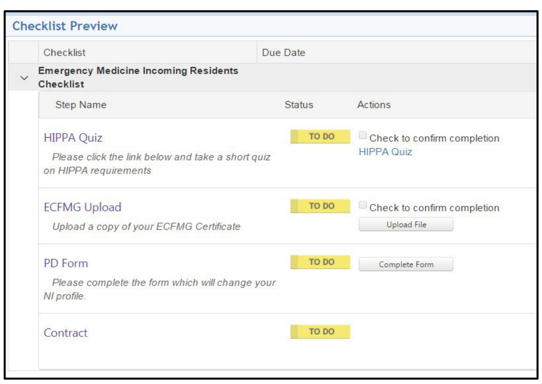
CREATE ADVANCEMENT CHECKLISTS

Why is this important?

The distribution of an advancement checklist is based on an advancement date in a person's record. If you wait until the advancement date has passed (i.e., the beginning of the academic year), the checklists will not be available for you to send.

Forms

Advancement checklists help you collect information and documents from your existing residents and fellows. If you use the forms feature, you can allow recipients to update information such as marital status, family size, address, contact information and other personal information



Additional Reviewers

Use '**Additional Reviewers'** to limit who can access a checklist to view or approve a step or series of steps. An example would be Human Resources personnel who would only be responsible for checking or approving specific employment items like W4 forms.

Conditional Recipients

Set conditions for who should be assigned to complete steps. For instance, use '**Conditional Recipients'** to limit an ECFMG step to only people who are graduates of foreign medical schools.

Copy Checklists

Checklists can be copied from one year to the next or from one type of checklist to another type. Just click on copy, then enter a name for the new checklist and select the department where the copy should go.

PERSONNEL RECORD MANAGEMENT

Why is this important?

Review new resident demographic information and update any necessary fields. It is very important that the necessary RMS Personnel Record fields are accurately entered and updated as hospitals use this as a resource to obtain information on the residents and fellows rotating to their institution.

Required Data & Documentation Standard Background

The MMCGME Operations Committee developed and the MMCGME Board approved a community-wide Required Data and Documentation Standard after surveying hospital training sites to see what data and documentation each site collects.

This standard ensures programs and hospitals are entering required data and documentation into New Innovations' Residency Management Suite (RMS) and that hospitals are able to access and rely on accurate and consistent information in RMS. This standard is in effect for trainees beginning July 1, 2019 and after.

Should you need assistance in advising your training sites how to access information about your trainees in RMS, please reach out to mmcgmehelp@umn.edu.

Required Data & Documentation Standard

History:
This standard was developed via the Hospital Onboarding Work Group of the MMCGME Operations Committee on which administrative members of the various sponsoring institutions sit.

Purpose:
To facilitate ease of trainees' rotations to various clinical sites while providing necessary documentation for hospital onboarding with the goal of reducing redundancies and administrative burden on site coordinators, program coordinators and trainees, thus preventing unnecessary delays in beginning training. The vast majority of hospital sponsors within MMCGME require the data listed below to participate in rotations at their sites.

This standard ensures programs and hospitals are entering required data and documentation into New Innovations' Residency Management Suite (RMS) and that hospitals are able to access and rely on accurate and consistent information in RMS, and hospitals should access and use the information in RMS for trainees beginning July 1, 2019.

Details:
The following information must be maintained by MMCGME-Sponsored Accredited Residency and Fellowship Programs and University Non-Accredited Residency and Fellowship Programs:

Currently MMCGME Services inputs and maintains and will continue to input and maintain the following data:

- Data: Department
- Data: ECFMG Certification Date (if applicable)
- Data: ECFMG Number (if applicable)

- Data: Email: Institutional email address
- Data: Initial Residency Program
- Data: Medical/Dental School Graduation Date
- Data: Medical/Dental School Name
- Data: Name: First
- Data: Name: Last
- Data: Name: Middle
- Data: Program/Start End Dates
- Data: Social Security Number

Required Data to be input by Program into RMS:

- Data: Address - Home
- Data: Address - Permanent (if different than Home Address)
- Data: Citizenship Country
- Data: Credential Degree (DO, DPM, MBBS, MB BCh, MBChB, MD, PhD, Other)
- Data: Date of birth (month/day/year)
- Data: DEA Number (if applicable)
- Data: Email: personal email address
- Data: Emergency Contact Information
- Data: Gender
- Data: MN License Number (If applicable)
- Data: MN License Expiration Date (If applicable)
- Data: MN Permit Number (if applicable)
- Data: MN Permit Expiration Date (if applicable)
- Data: NPI Number*
- Data: Pager Number*
- Data: PECOS*
- Data: Phone - Cell
- Data: Phone - Home
- Data: Visa Number (if applicable)
- Data: Visa sponsorship status (if required)
- Data: Visa start and end dates

Required Documentation in RMS

- Documentation: Background Study Clearance Form (NETStudy 2.0)
- Documentation: Contract/Agreement (between trainee and institution)

- Documentation: ECFMG Certificate (if applicable)
- Documentation: Liability/Workers Compensation Insurance Coverage Verification*
- Documentation: License (if applicable)
- Documentation: Medical School Diploma
- Documentation: PECOS approval letter, if enrolling for the first time*
- Documentation: Permit (if applicable)
- Documentation: Photo
- Documentation: Prior GME Training Completion Certificates
- Documentation: Prior Training History
- Documentation: PLA

Preferred Data in RMS

- Data: Race/Ethnicity

*applicable only to GME trainees

Procedures:
Programs are able to define their own process steps regarding input of the above information. Information should be entered into RMS Demographic Data prior to trainee rotation start date. MMCGME Services is available to assist with set up of checklists to facilitate ease of collecting the above information or additional on-site training as necessary.

MMCGME Services will annually monitor data and documents for non-compliance. Non-compliance with the Required Data Standard may result in trainees not being allowed to train at sites.

SCHEDULES MODULE

REVIEW ROTATION NAMES

Why is this important?

The next step in preparing for the new academic year is to look at the existing rotations in RMS and compare them with the rotations identified in the annual rotation schedule for your program. Be sure that all your necessary rotations exist in RMS.

When reviewing rotations, **please be sure that any rotations not occurring at your institution are identified with a four-letter abbreviation code at the end of the rotation name**. This will ensure that the other institutions will be able to obtain the necessary information about the rotating residents.

View Existing Rotations

1. Click ***Schedules***.
2. In the top box labeled Block Scheduling, under the heading Setup, click ***Rotation Names*****.**
3. Make a note of any rotations that do not currently exist that will be required to build the block schedules for your program(s.

Add, Update, Remove or Archive Rotations

If you need a new rotation added, an existing rotation updated, or rotations no longer used, complete the **"Rotation Request Form."** The Rotation Request Form is located on the MMCGME Services website Rotation Request Form..

Upon receipt of the Rotation Request Form, MMCGME Services will review the request to determine if the information is complete and if the request meets the requirements of the institutions involved. These institutions are the **Sponsoring Institution (Program)** and the **Receiving Institution (Training Site for the Rotation)**.

If the Sponsoring and Receiving Institutions are different, formal agreements – **"Program Letter of Agreement" (PLA)** – must be in place before sending a resident/fellow to that training site. The program is responsible for initiating these contracts with the Receiving Institutions.

MMCGME Services will process the request and, if a similar rotation exists, will update the rotation to reflect the needs of all programs that use it.

Rotations Naming Standard

The naming standard for rotations is: [Institution] [Department/Program] [Subspecialty] [Learning Experience] [Site]

Example: UMN-PEDS-CC-PICU-HCMC

- UMN = institution/site which sponsors the training program
- PEDS = abbreviated name of the department (Pediatrics) that "owns" the program (aka 'division' – which is New Innovation's term)
- CC = sub-specialty (Critical Care) -- many of the sub-specialty names are long, so they may be abbreviated.
- PICU = learning experience detail (Pediatric Intensive Care Unit)
- HCMC = site where rotation occurs (Hennepin County Medical Center) -- a rotation may occur at more than one site, so all sites may be listed.

MMCGME Rotations

MMCGME Services has created standard rotations for events that are common to all residency and fellowship programs.

MMCGME Rotation	Definition
MMCGME-LATE START	When a resident starts off-cycle, this block occupies the time between the start of the academic year and the resident's program start date.
MMCGME-OFF CYCLE GRAD	This rotation identifies when a resident graduates from a program mid cycle. When this happens in the middle of an academic year, this block occupies the time between the program end date and the end of the academic year. Typical use of this rotation occurs when a resident starts late, had maternity/paternity leave or any other occurrence that caused them to graduate off-cycle.
MMCGME-RESIGNED	This rotation identifies when a resident resigns or leaves the program early without completing all requirements. When this happens in the middle of an academic year, this block occupies the time between the termination date and the end of the academic year.
MMCGME-TIME AWAY EXTENDS	This identifies dates during which a resident is on a Time Away that EXTENDS her/his time in the residency program. This rotation should appear in the block schedule without any other rotations appearing in the block schedule for that time period. The Time Away Extends form can be found on the MMCGME Services website on the "Forms and More Resources" page. **NOTE**: Time Away – Does NOT Extend Short/Long does not need to appear on the block schedule. It would only appear on the assignment schedule.

These rotations are used as NON-PRIMARY ROTATIONS and **DO NOT** require assignment scheduling:

MMCGME Rotation	Definition
MMCGME-MEDICAL OR PARENTAL LEAVE	FOR PROGRAMS WHO USE ROTATION PROTOCOL These are secondary rotations for use with the trainee's ORIGINAL SCHEDULE and are intended for programs who wish to track such items in RMS and are exclusively on Rotation Protocol.
MMCGME-PANDEMIC TIME AWAY	
MMCGME-PERSONAL LEAVE	
MMCGME-PROFESSIONAL CONFERENCE	
MMCGME-SICK **MMCGME-SICK HALF DAY**	
MMCGME-VACATION **MMCGME-VACATION HALF DAY**	

BLOCK SCHEDULING

The Block Schedule displays information about residents rotating to different services throughout the year and who will precept the rotation. Information such as status, post graduate year and program come from the Personnel module. Rotation names and academic year intervals used on the schedule come from Administration.

Why is this important?

Besides needing to know what rotations your trainees are serving, there are other modules in the software that use the Block Schedule for information:

- Evaluations - The Evaluation module uses the block schedule to create evaluations between people who are working together on the same rotation
- Duty Hours - ACGME Duty hour rules are calculated based on the rotation schedule
- Conferences - Conference Rosters are created using the status and rotation from the block schedule
- Assignment Schedules - Residents must first be on the block schedule in order to schedule their daily tasks on the Assignment Schedule
- Finance/IRIS – Calculations for IRIS reimbursement are based on the block schedule
- Curriculum – Distribute each rotation's Goals and Objectives to residents before they begin their rotation
- Rotation Requirements - Each program can set up their own rotation requirements to track the number of weeks a resident or fellow spends on rotations that are required for the program.

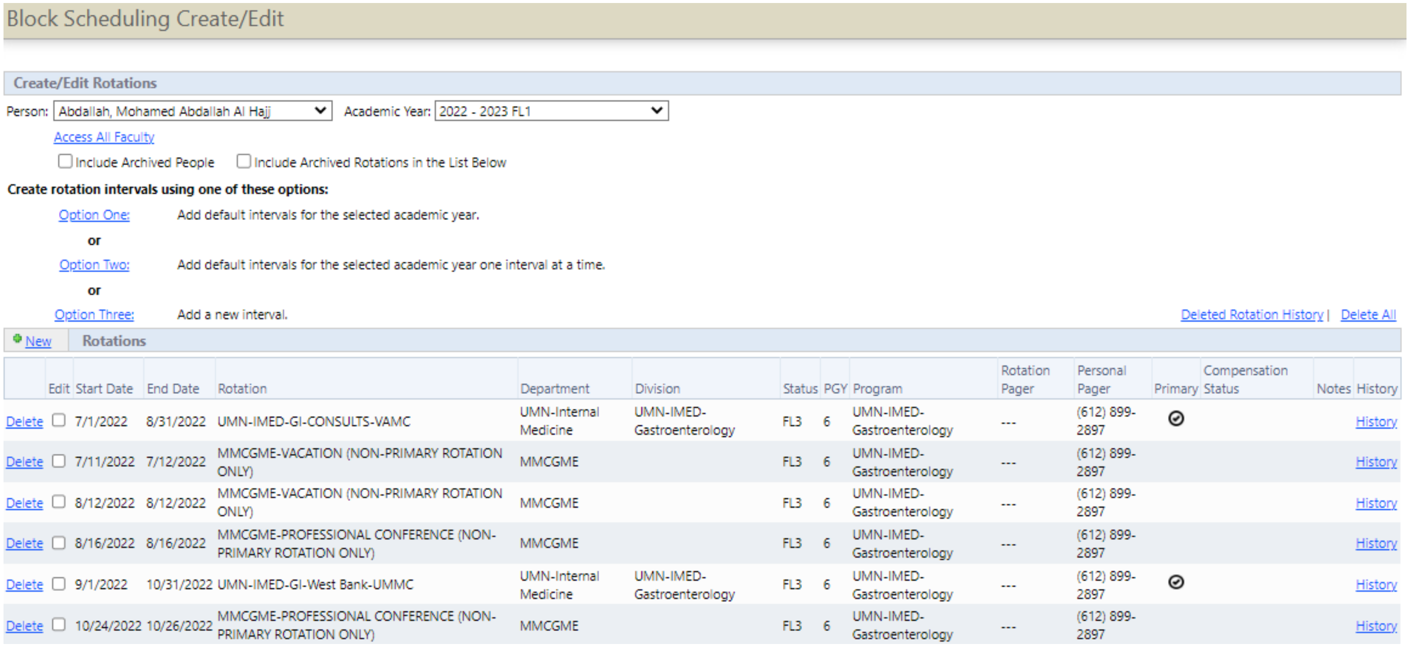
Person	July	August	September	October	November	December	January	February	March	April	May	June
PRG 1 (FM-Family Medicine)												
Archer, D	FM:SportsMed-SC	FM:MedA-SC	FM:MedB-SC	FM:MedC-SC	FM:Geri-PCMH	FM:FPC2-PCMH	FM:Derm-SC	FM:Card-VA (2/1 - 2/28)	FM:AmbGyn-SC	EM	FM:Card-SC	PED:COMMUNITY
Wolf, B	FM:Geri-PCMH	FM:AmbGyn-SC	FM:Card-SC	FM:Card-VA	FM:ComMed-SC	FM:Derm-SC	FM:FPC2-PCMH	FM:Geri-PCMH (2/1 - 2/28)	FM:MedA-SC	FM:MedB-SC	FM:MedC-SC	FM:SportsMed-SC
PRG 2 (FM-Family Medicine)												
Aktar, A	FM:Card-SC	FM:Card-SC	FM:Card-VA	FM:ComMed-SC	FM:Derm-SC	FM:FPC2-PCMH	FM:Geri-PCMH	FM:MedA-SC (2/1 - 2/28)	FM:MedB-SC	FM:MedC-SC	FM:SportsMed-SC	DM:IM:WOMEN'S HEALTH
Julka, V	FM:ComMed-SC	FM:Derm-SC	FM:FPC2-PCMH	FM:Geri-PCMH	FM:MedA-SC	FM:MedB-SC	FM:MedC-SC	FM:SportsMed-SC (2/1 - 2/28)	FM:AmbGyn-SC	FM:Card-SC	FM:Card-VA	EM
O'Doull, K	FM:MedA-SC	FM:MedB-SC	FM:MedC-SC	FM:AmbGyn-SC	FM:Card-SC	FM:Card-VA	FM:ComMed-SC	FM:Derm-SC (2/1 - 2/28)	FM:FPC2-PCMH	FM:Geri-PCMH	FM:SportsMed-SC	DM:IM:WOMEN'S HEALTH
Parke, B	FM:MedB-SC	FM:Card-SC	FM:Card-VA	FM:ComMed-SC	FM:Derm-SC	FM:Elect	FM:FPC2-PCMH	FM:Geri-PCMH (2/1 - 2/28)	FM:MedA-SC	FM:MedB-SC	FM:MedC-SC	FM:SportsMed-SC
PRG 3 (FM-Family Medicine)												
Baker, T	FM:SportsMed-SC	FM:MedA-SC	FM:MedB-SC	FM:MedC-SC	FM:AmbGyn-SC	FM:Card-SC	FM:Card-VA	FM:ComMed-SC (2/1 - 2/28)	FM:Derm-SC	FM:FPC2-PCMH	DM:IM:WOMEN'S HEALTH	EM
Gomez, M	EM	FM:AmbGyn-SC	FM:MedA-SC	FM:MedB-SC	FM:MedC-SC	FM:SportsMed-SC	FM:AmbGyn-SC	FM:Card-SC (2/1 - 2/28)	FM:Card-VA	FM:ComMed-SC	FM:Derm-SC	FM:Geri-PCMH
Wallace, C	FM:AmbGyn-SC	FM:Card-SC	FM:Card-VA	FM:MedA-SC	FM:MedB-SC	FM:MedC-SC	FM:SportsMed-SC	EM (2/1 - 2/28)	FM:AmbGyn-SC	FM:Geri-PCMH	FM:Derm-SC	FM:Card-VA

There are two ways to create your Block Schedules: Online and MedScheduler

BUILD SCHEDULES ONLINE

Select an Option:

- Option 1 – Build schedules for Residents and Fellows for all intervals in the academic year at one time. Use this option when the schedule follows the exact intervals in your academic year.
- Option 2 – Build schedules for Residents and Fellows one interval at a time. Use this option when you have split rotations or the schedule does not follow the exact intervals in your academic year. This is the recommended option for building trainee schedules.
- Option 3 – Build schedules for Faculty members. Consider extending the End Date to a year in the future to keep from entering their schedules every year.



Avoid gaps in block schedule dates. It is important to remember that residents need to have a rotation assigned to them for every week of the academic year. Rotations must be assigned even for time a resident spends in non-reimbursable activities. To identify time when a resident is not participating in reimbursable activities, a generic MMCGME block is inserted in the schedule.

If you notice that information (such as status, PGY, etc.) is incorrect in the block schedule, please notify MMCGME Services. Information flows from the Personnel Record module to the Block Schedule module, but remember updates made in the Block Schedule module **DO NOT** update Personnel Record information.

Create Resident Schedules

1. Click ***Schedules****.*
2. In the top box labeled Block Scheduling, click ***Schedule Rotations*****.**
3. Select the person from the dropdown list
4. Select the academic year to be used for scheduling
5. Select the appropriate scheduling option described below to add rotations for the selected person.

*Option Two***:** Used for adding resident or fellow schedules

1. Click **Option Two**
2. The start and end date are populated from the academic year template
3. Resident or fellow personal information is populated from Personnel Record files
4. Rotation department defaults to Rotation Favorites. If a rotation is not in Rotation Favorites, select the department where the rotation occurs from the Rotation Department dropdown list. When the screen refreshes, the Rotation dropdown list is populated with the rotations from that department
5. Select the correct rotation from the Rotation dropdown list
6. Click **Save and Continue**
7. Repeat until the block schedule for the academic year is complete

Create Faculty Schedules

Option Three: Used to build faculty schedules.

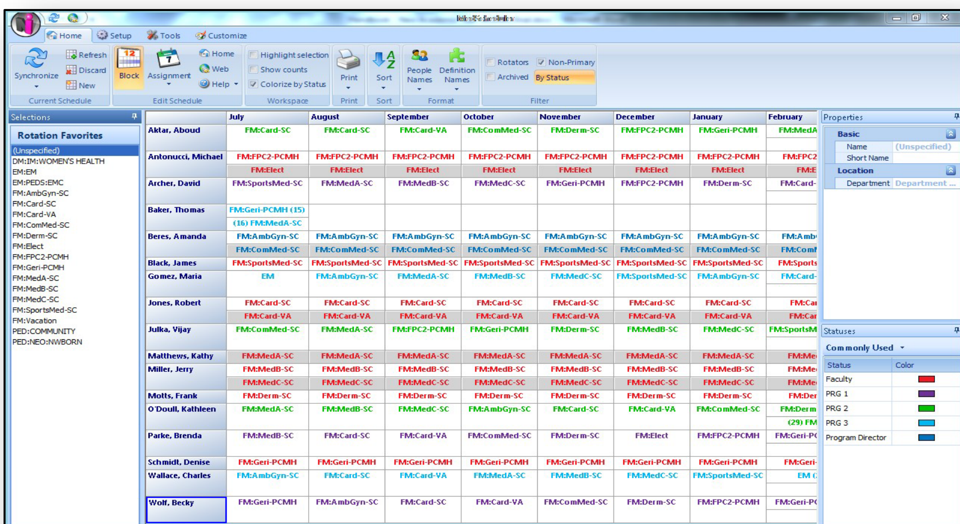
1. Select the person from the dropdown list
2. Click **Option Three**
3. Enter the start and end date of the academic year
4. Select the appropriate rotation
5. Click **Save**

BUILD SCHEDULES WITH MEDSCHEDULER

MedScheduler is a Windows desktop application that allows you to easily create your schedules using ‘drag and drop’ capabilities. MedScheduler can be installed directly onto your computer workstation. It communicates securely over the internet directly with your New Innovations online database. Once you are done modifying schedules in MedScheduler, you simply synchronize and your online database will be immediately updated to reflect the changes.

Why is this important?

- Create and edit the entire block schedule for your program at one time
- Use the easy ‘drag and drop’ functionality
- Set alerts for rule limitations and maximum sizes
- Easy print, PDF and email options



You will be required to log in each time MedScheduler is started or synchronized. MedScheduler will retain the department and username information regarding your last login.

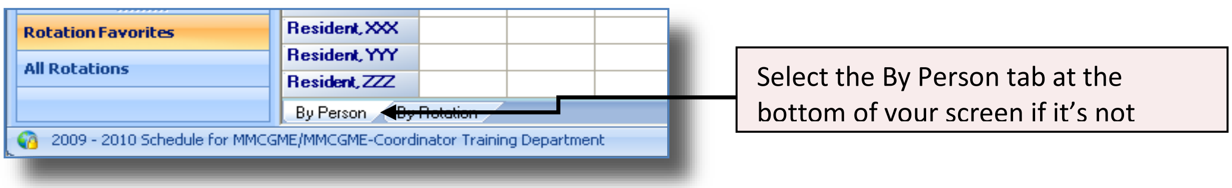
1. Go to ***Start*** *on your computer* > ***All Programs*** > ***New Innovations, Inc*** > ***MedScheduler***

NOTE: You must first download the MedScheduler application to your desktop. To do so, go to New Innovations and select ***Schedules***> ***Install MedScheduler*** **(the box appears in the lower right hand corner of the screen)** and follow the download instructions on the page.

2. After loading, the *Synchronization Wizard* dialog box will appear. Click **Next** to continue.
3. Enter your **Login Information**: The Institution Login will always be MMCGME. Enter your User Name and Password and click **Next** to continue.
4. Select a **Department/Division** and a **Year** then click **Next** to continue.
5. Verify that you have the correct Academic Year selected and click **Next** to continue.
6. Choose your **Commonly Used Statuses.** (Use the arrow buttons to transfer statuses from the Available Statuses list to the commonly used list.)
7. Verify the **Academic Year** selected for each Status and Click **Next**.
8. Click '**Finish**' and MedScheduler will proceed to load the schedule for editing.

Creating your Block Schedule

1. Select **Block** from the “Edit Schedule” tab along the top of your screen.
2. MedScheduler offers two options for creating Block Schedules, one is By Person and the other is By Rotation. This training will cover the By Person method.



3. Select a **Rotation** from “Selections Panel” which is displayed on the left side of the screen.

   NOTE: If you do not see your desired rotation you can click “All Rotations” at the bottom of the panel and click on the “+” icon to expand department rotation lists.

4. Locate the row of the person and the column of rotation interval being scheduled and click the cell to assign the rotation to that person.
5. Repeat for all additional rotations.

   NOTE: **Rotations scheduled in the MedScheduler are not saved to RMS until synchronization.** (See Synchronization of MedScheduler below for further instruction).

Editing an Individual’s Schedule in MedScheduler

Examples of situations that may require changes to a resident/fellow’s schedule are:

- A rotation changes
- An individual switches rotations
- A resident/fellow goes on maternity leave during a rotation

Swapping a Rotation

The following can be done on a resident-by-resident basis or for all residents at once:

NOTE: If you are using a newly created Rotation Favorite, you may need to re-synchronize your MedScheduler application depending on your last login.

1. Select the new rotation from the Rotation Favorites list on the left side of the screen

2. Right-click the appropriate rotation/block for the affected resident
3. This will generate a drop down menu with several options:
    a. Delete this (Existing Rotation Name) rotation
    b. Delete all (Existing Rotation Name) rotations
    c. Delete all rotations for (Resident Name)
    d. Delete all (Existing Rotation Name) rotations with (New Rotation Name) rotation
    e. Schedule (Resident Name) on a non-primary (New Rotation Name) rotation
4. Clicking any of these options will perform the above action

Editing Existing Rotations

1. Click the appropriate rotation/block for the affected resident
2. Go to the Properties window on the right hand side of the screen
3. Adjust the Start or End Date field to the newly determined date based on the rotation split and hit Enter
4. The primary first rotation will display a (date) to indicate the newly entered Start or End date from the previous step
5. Select the new rotation from the Rotation Favorites list on the left side of the screen
6. Click the block that will be split
7. The new rotation will also indicate a (date) depending on if it covers the first or second portion of the block

NOTE: By default the rotation split will adjust itself to the start and end dates set in the Academic Year. However, these dates can be adjusted on a rotational level as described in step 3.

Synchronizing MedScheduler

To transfer data to RMS, it is necessary to synchronize MedScheduler. The Sync Results button displays a report listing the details and results of the last synchronization.

1. On the Home tab along the upper left of the screen, in the Current Schedule group, click **Synchronize.**
2. Click **Next** to continue.
3. Enter your Login information and click **Next** to continue.
4. Click **Next** to synchronize the schedule.
5. The application will re-verify that you would like to submit your changes at this time, click **Yes**.
6. A window will appear that displays any changes that were made to the block schedule during the synchronization, click **Next**.

The application will notify you that the synchronization process has completed, click **Finish**

REVIEWING ASSIGNMENTS

If your department uses Assignments, review your assignments and create new assignments if residents/fellows will be going to new training sites or they have a change in the experience. Archive any assignments you do not think are needed for the next academic year. Look for opportunities to simplify and condense the number of assignments you currently have. Contact mmcgmehelp@umn.edu to get a new location code, if necessary.

Review Your Assignments

1. Click ***Schedules***
2. In the lower box labeled Assignment Scheduling, under the Setup heading, click ***Assignment Definitions***
3. Review the list for accuracy and take note of any assignments you may need to add.

   The standard for naming assignments is as follows:
   [Location]–[Dept] [Activity] [Program Name] [Program Specific]
   Optional Optional

Location – a *pre-defined* identifier (usually 4-letter location – such as ABNW for Abbott Northwestern or HCMC for Hennepin County Medical Center)

Hyphen (no space before or after)

Dept. – Where at the hospital is the activity taking place. The purpose of this field is important information for reimbursement to configure.

Activity – specific resident learning experience (i.e. call, clinic, inpatient)

Program Name – This is optional

Program Specific – This is optional and can be used to further define the assignment such as adding a preceptor name, program name or the time of day the activity takes place.

Examples include:

HCMC-OB/GYN Clinic AM (Hennepin County Medical Center OB/GYN clinic, morning session)

USTH-Sports Medicine Training Room (University of St. Thomas Sports Medicine Training Room)

UMN-Adol Health Lecture (University of Minnesota Adolescent Health Lectures)

RGHP-OR-Ortho AM (Regions Health Partners, Orthopedics, Operating Room, AM shift)

There are six main categories for naming Assignments. They are:

Patient Care - the care and treatment of specific patients, including service for which a physician or other practitioner may bill

Instructor Led Learning (Didactic) - planned learning experiences led by an instructor, preceptor, or program director

Self-Directed Learning – self study

Time Away – vacation or other leaves of absence

Call - home call service coverage

Moonlighting – additional experience outside of curriculum

Research- patient care or lab-related research activities

Examples of Resident Activity Types:

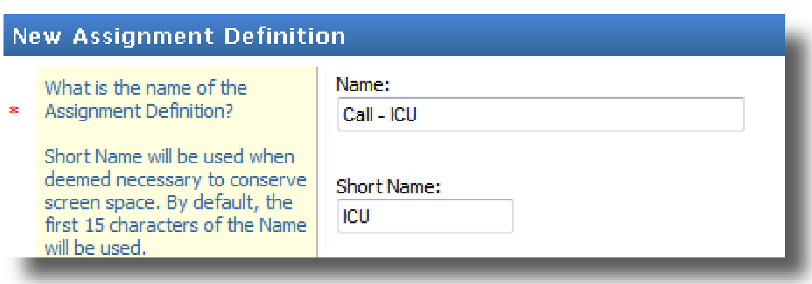
Patient Care		
OR (aka Surgery) Same Day Surgery Inpatient (aka Attending, Service, Ward, Floor, Float, Rounds)	Clinic Outpatient (aka Therapy, Consults) Continuity Clinic Morbidity & Mortality (M&M)	Morning Report ICU New Born Nursery
Patient Care Related Research		
Patient Care Activity (analyzing current or recent patient care data)	Bench Research (lab research, review of old patient records, etc.)	
Instructor-Led Learning (Didactic)		
Journal Club Grand Rounds Noon Conference	Core Curriculum (Institutional) Professional Conference Lecture	Core Competency Lecture Technical/Computer Training Evidenced Based Medicine
Self-Directed Learning		
Benchmark Labs Coursework	Parental/Child Development Labs	Scholarly Activities/Projects Community Experience
Time Away		
Time Away – Does Not Extend Training Short	Time Away – Does Not Extend Training Long	
Call		
Call (aka On Call, House/ Overnight, includes post-call time)	Home Call (Backup, Weekend Coverage, Chief Call)	

Create an Assignment Definition in RMS

1. Select ***Schedules.***
2. In the lower box labeled Assignment Scheduling, under the heading Setup, click ***Assignment Definitions***.
3. Click **New** in the header for the Assignment Definition table and the **New Assignment Definition** page will appear.

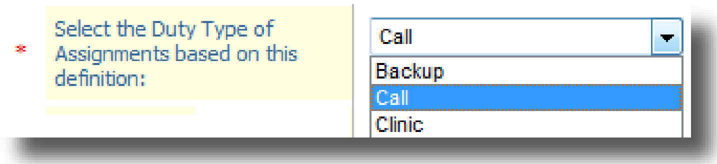
After each assignment is created, it is displayed in the *Assignment Definitions* table.

4. Enter the **Name** of the Assignment Definition.



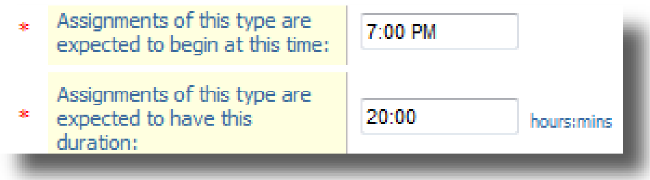
The name entered here will appear in selection lists and on the schedule. The *Short Name* field allows the assignment to appear in an abbreviated form according to schedule settings or space constraints.

5. Select the **Duty Type** from the drop down list.



6. Enter the **Training Location**.

7. Set the most common **Start Time** and **Duration** for the assignment.



8. If desired, select an identifying **Color** that will appear when the assignment is displayed on the schedule**.**

9. Click **Save Assignment Definition**.

   The *Assignment Definitions* page will appear where additional definitions may be created, existing definitions may be modified.

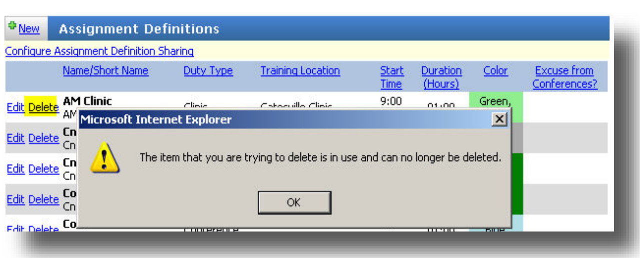
New | Assignment Definitions

Configure Assignment Definition Sharing

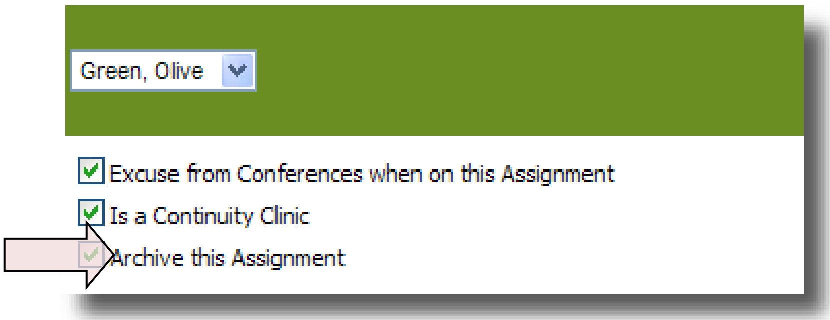
	Name/Short Name	Duty Type	Training Location	Start Time	Duration (Hours)	Color	Excuse from Conferences?
Edit Delete	**AM Clinic** AM Clinic	Clinic	Gatesville Clinic	9:00 AM	01:00	Green, Light	
Edit Delete	**Cnf** Cnf	Conference	Austin VA	9:00 AM	01:00	Gray	
Edit Delete	**CnfInfDis** CnfDH	Conference		9:00 AM	01:00	Green, Dark	

Edit, Delete or Archive/Unarchive an Assignment Definition in RMS

1. Select ***Schedules.***
2. In the lower box labeled Assignment Scheduling, under the heading Setup, click ***Assignment Definitions***.
3. If desired, click the **Delete** link located to the left of an Assignment Definition- if you have not used the assignment it can be deleted.

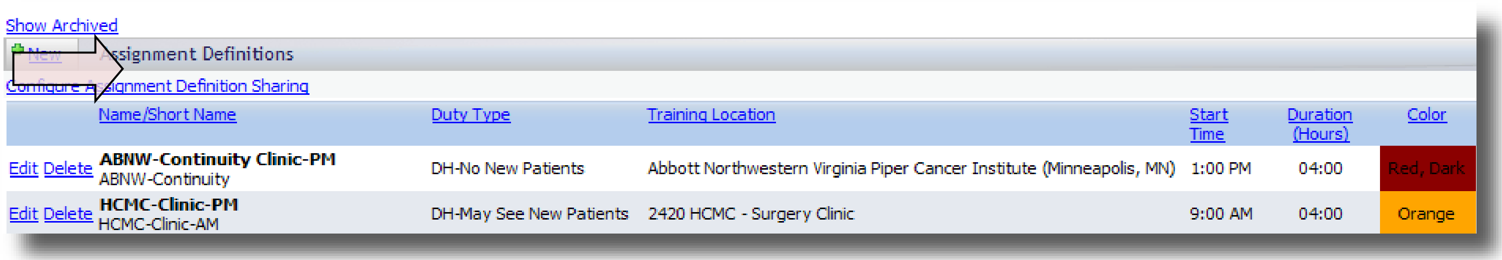


4. If you wish to edit or archive an Assignment Definition, click the **Edit** link located to the left of an Assignment Definition. Make changes as desired and then scroll to the bottom of the screen and click the **Save Assignment Definition** link. You will notice that the option to archive this assignment requires you to select the corresponding checkbox. See the example below.



NOTE: Do not change an assignment if the wrong location code was used. You MUST archive the old assignment and build a new one!

5. If you wish to un-archive an Assignment Definition, click the **Show Archived** link (pictured below) and then click the **Edit** link located to the left of the Archived Assignment Definition. Scroll down to just below the band of color (pictured above) and remove the check from the **Archive the Assignment** checkbox. Finally, scroll to the bottom of the screen and click the **Save Assignment Definition** link.

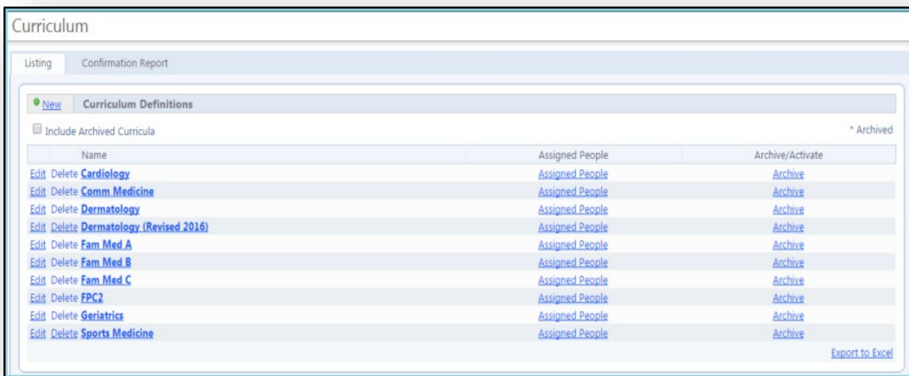


DISTRIBUTE CURRICULUM

The Curriculum module offers you a place to store rotation Goals and Objectives.

Why is this important?

- Automatically distribute curriculum to residents and fellows prior to their scheduled rotations
- Send emails and Home Page notifications to direct recipients to the curriculum documents
- Residents can confirm they've read and understood the rotation goals and objectives
- Program administrators can generate Confirmation Reports proving they have a process in place to distribute rotation goals and objectives and ensure that residents and faculty read and understood them prior to the start of their rotations
- Check resident compliance on Curriculum confirmation



If your Curriculum Definitions are changing for the new academic year you can copy and edit an old Curriculum Definition rather than create new definitions.

Copy a Curriculum Definition

Use these instructions to create a new Curriculum with the same configurations as the copy. The original Curricular Document remains with the copied Curriculum Definition. If you want to associate a different Curricular Document with the copied Curriculum Definition, use the **Swap** feature.

1. Select ***Schedules***.
2. In the top box labeled Block Scheduling, click ***Curriculum*.** Click the **Edit** link located to the left of the Curriculum you wish to copy.
3. Scroll to the bottom of the screen and click the **Clone** link and then the **OK** button.
4. Enter a unique name for the new Curriculum Definition; then click the **Save** link.
5. If needed, click the **Edit** link located to the far left of the new Curriculum Definition, change any configuration, and then click the **Save Configuration** link.
6. Edit the active dates and archive the old curriculum.

Swap One Curricular Document for Another

You may switch one Curricular Document for another at any time. However, if anyone has confirmed reading their curriculum, you must first remove all confirmations. The people that confirmed will then be assigned the new (and unconfirmed) Curricular Document, unless you change the Curriculum Definition to exclude them.

1. Select ***Schedules****.*
2. In the top box labeled Block Scheduling, click ***Curriculum*****.**
3. Click the **Edit** link located to the left of the Curriculum you wish to copy.
4. Click the **Remove Confirmations** link and then click the **OK** button. Clicking the **Remove Confirmations** link. Removed confirmations cannot be viewed using the Confirmation Report or any other method. The **Remove Confirmation** link will not be present if no one has confirmed the Curriculum.
5. If desired, edit the Curriculum Definition and then scroll to the bottom of the screen and click the **Save Curriculum** link. The new Curriculum will be assigned as configured. You may revise an existing Curricular Document by editing it on your computer and then swapping it with the old one. Or, you may upload the revised document to a new Curriculum Definition and reassign it.

TIP: When swapping out old curricular documents for new curricular documents, it is recommended to print a confirmation report for the previous year for your RRC files.

Edit a Curriculum Definition

1. Select ***Schedules****.*
2. In the top box labeled Block Scheduling, click ***Curriculum*****.**
3. Click the **Edit** link located to the left of the Curriculum you wish to edit. Make changes as necessary and then click the **Save Curriculum** link at the bottom of the screen.

If you check either email notification box while editing an existing Curriculum Definition, an email will be sent to everyone meeting the Rotation and Status Type criteria, including those who have already received an email notification when the Curriculum Definition was first created.

Delete a Curriculum Definition

It is easy to delete a Curriculum Definition associated with that Curricular Document that no one has confirmed. You simply click a **Delete** link, the Curriculum Definition disappears, and anyone who had been assigned the definition's associated Curricular Document will no longer be able to view it. However, if anyone has already confirmed a document, you must remove those confirmations before the Curriculum Definition can be deleted. If confirmations are removed and a Curriculum Definition deleted, no one will be able to access the document and there is no way to determine if a person ever read and confirmed it.

1. Select ***Schedules****.*
2. In the top box labeled Block Scheduling, click ***Curriculum*****.**
3. If the **Delete** link is active (NOT disabled), go to Step 3. If the **Delete** link IS disabled, click the **Edit** link (see first screenshot below), then click the **Remove Confirmations** and the **OK** link. Finally, click the **Curriculum** menu item located at the top of the **Edit Curriculum** screen. Go to Step 3.
4. Click the **Delete** link located to the left of the Curriculum Definition you need to delete and then click the **OK** button.

REVIEW EVALUATION FORMS

Why is this important?

- Review and archive forms you no longer use.
- You can only make small edits to existing form such as a typo. You can copy an existing form to a new form to make larger edits.

COPY SESSIONS

Why is this important?

- To maintain continuous distribution of evaluations from one year to the next.

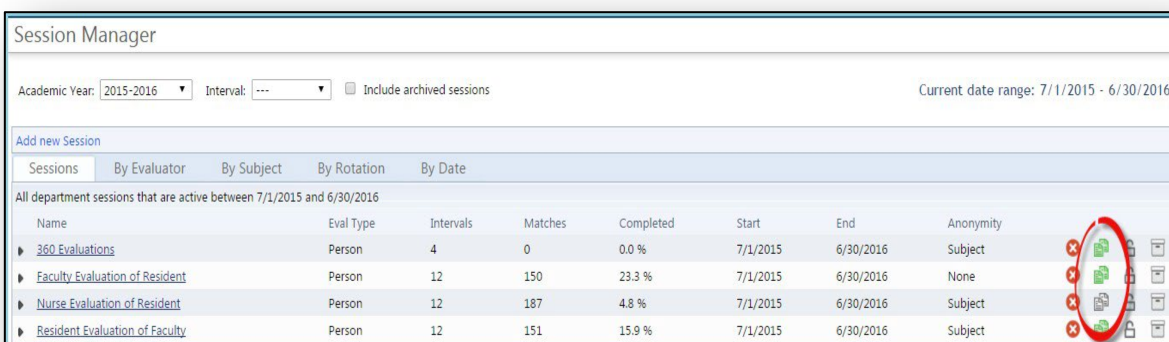
There are two ways to copy your sessions:

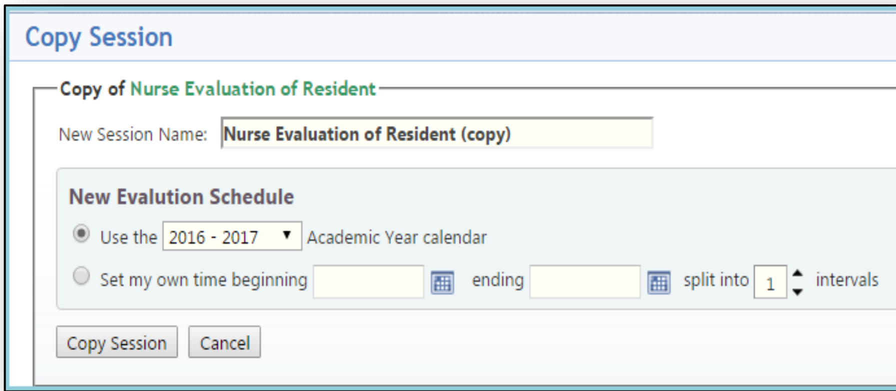
- Configure the 'Auto Copy' feature - Excellent for sessions that use the same interval configuration each year.
- Manually copy sessions one at a time - Best for sessions where the intervals will be different next year.

CONFIGURE AUTO COPY

Set up your sessions to automatically copy into the next academic year. The copy will be made on the last day of your current academic year. For most programs, that will be June 30th.

On the Session Manager page, check the Copy icons. Those marked with a 'green' Copy icon are configured to auto-copy into the next academic year on June 30th.





To maintain continuous evaluation distribution from one year to the next, all you have to do is copy your evaluation sessions to the next year. This would be also be a convenient time to make changes to your questionnaires so you can attach the new form to the new sessions. And if you'd like to change signature options for the evaluations, this is a good time for that as well.

Copy Evaluations

1. Click ***Evaluations*** > ***Session Manager***
2. Click the **Copy** icon next to the session to copy
3. You can rename the session if you like. We would suggest taking the word (copy) out of the title because it appears every time the session is copied. It is recommended to include the name of the program and the current year in the session name also.
3. Create the new interval schedule by selecting the academic year or entering start and end dates and selecting the number of intervals required.
4. Click **Copy Session**
8. Make changes to available date, due date and interval dates if needed
9. Click **Continue**

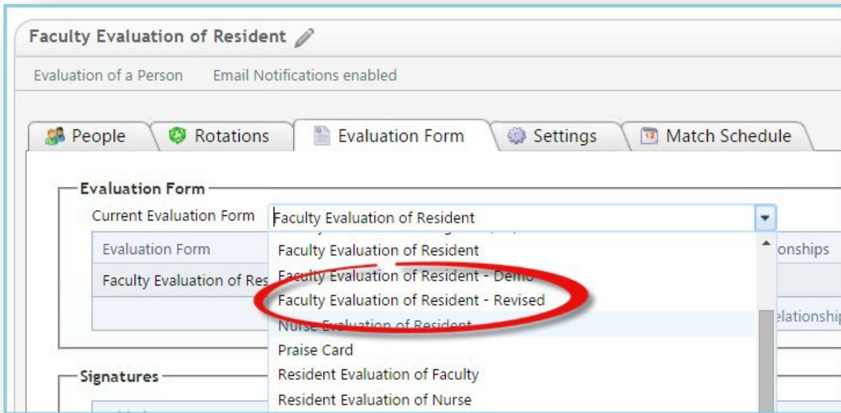
Repeat these steps for every session in your list.

You can easily copy your recurring conferences to the next year along with their notifications and surveys. And when the roster is created, it will pick up the next year's statuses and rotations for the people on the roster.

REPLACE EVALUATION FORM IN SESSION

Why is this important?

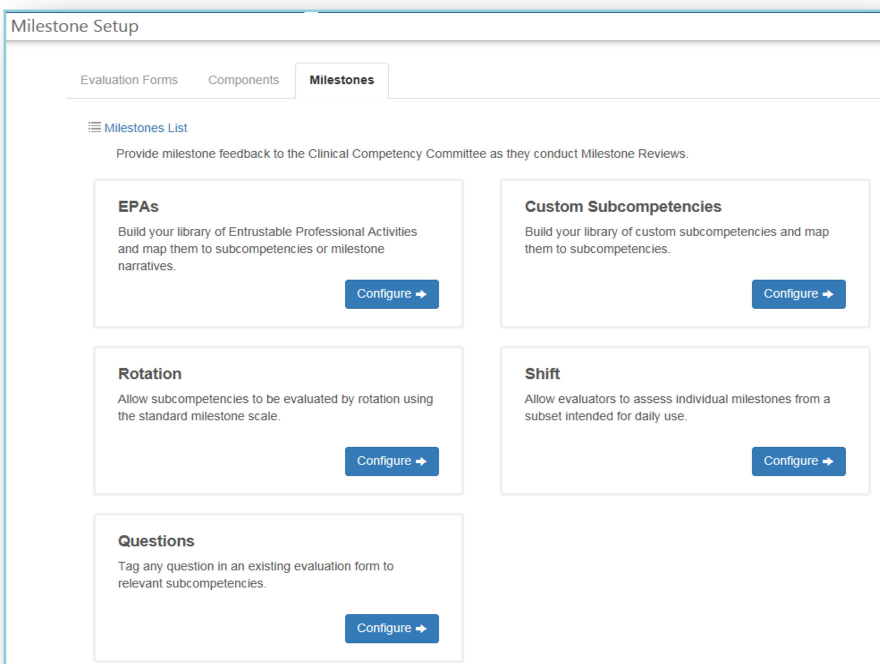
- Distribute your new or edited Evaluation Form



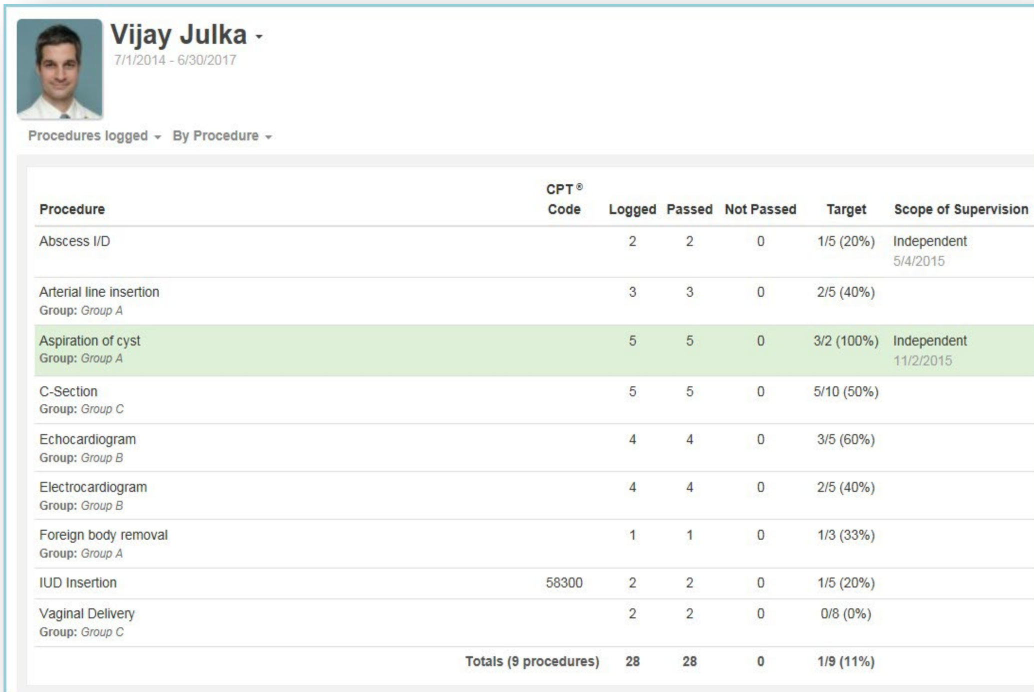
MILESTONE MAPPING

Why is this important?

- Provide evaluation results to your CCC when they're completing the Milestone Reviews



Residents can log their procedures and be automatically credentialed based on your target numbers.


Vijay Julka
7/1/2014 - 6/30/2017
Procedures logged · By Procedure

Procedure	CPT® Code	Logged	Passed	Not Passed	Target	Scope of Supervision
Abscess I/D		2	2	0	1/5 (20%)	Independent 5/4/2015
Arterial line insertion Group: *Group A*		3	3	0	2/5 (40%)	
Aspiration of cyst Group: *Group A*		5	5	0	3/2 (100%)	Independent 11/2/2015
C-Section Group: *Group C*		5	5	0	5/10 (50%)	
Echocardiogram Group: *Group B*		4	4	0	3/5 (60%)	
Electrocardiogram Group: *Group B*		4	4	0	2/5 (40%)	
Foreign body removal Group: *Group A*		1	1	0	1/3 (33%)	
IUD Insertion	58300	2	2	0	1/5 (20%)	
Vaginal Delivery Group: *Group C*		2	2	0	0/8 (0%)	
	Totals (9 procedures)	28	28	0	1/9 (11%)	

VERIFY PROCEDURE LIST IS CURRENT

Why is this important?

- Add new procedures
- Archive procedures not used anymore
- Check Supervision and Privilege targets to keep them current.

1. Select **Logger**
2. Under the Setup menu, click **Lists & Fields**
3. Click the **New** link to the left of the **Procedures** heading.
4. Type in the name of the procedure you want to add
   Enter credentialing targets for direct, on-site, off-site or oversight numbers
5. Click the **Save** button

VERIFY DIAGNOSES LIST IS CURRENT (if applicable)

You only need to do this if you provide a list for the residents.

Why is this important?

- Add new diagnoses
- Archive diagnoses not used anymore
- Check Supervision and Privilege targets to keep them current

VERIFY OTHER OPTIONS

Check the options available to your residents when logging a procedure/diagnosis, such as:

- Locations
- Visit Types
- Roles
- Supervisors
- Patient Types

Editing Roles, Locations, Patient Types and Visit Types

1. Select **Logger**
2. Under the Setup menu, click **Lists & Fields**
3. Click **Locations, Roles, Patient & Visit Types** tab
4. Click the **Edit** link

Managing Credentialing Targets

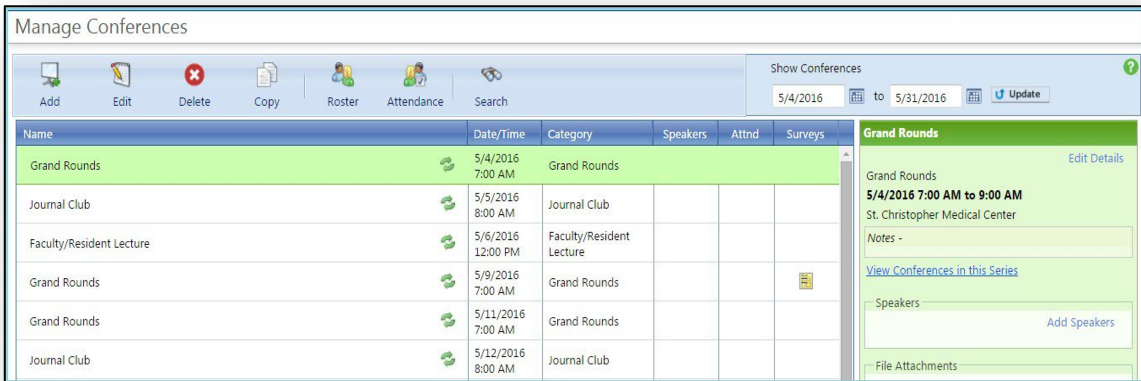
1. Select **Logger** > under **the Setup** menu, click **Lists & Fields**
2. Click **Edit** next to the procedure name.
3. Change any credential target number that you wish.

COPY CONFERENCES

Why is this important?

- Provide an accurate and continuous calendar of educational conferences
- Notify attendees and speakers with email alerts
- Offer feedback with conference surveys

Important: Copy your conferences after your block schedule is finished so everyone on your roster has the correct status and rotation.



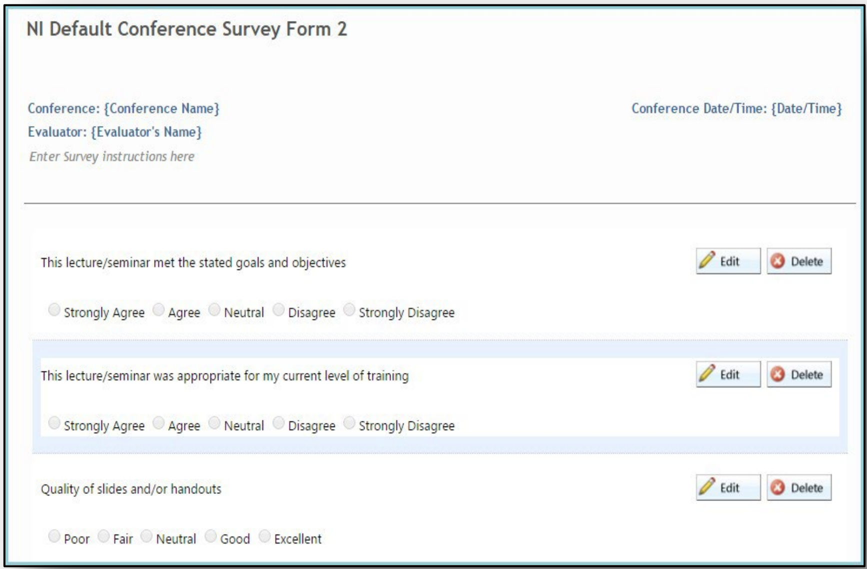
You can easily copy your recurring conferences to the next year along with their notifications and surveys. And when the roster is created, it will pick up the next year's statuses and rotations for the people on the roster.

1. Click ***Conferences*** > ***Manage Conferences***
2. Click on the conference to copy
3. Click on Copy at the top
4. Edit the title if needed. You might want to take out the words COPY OF…
5. Check the box to make the copy recur
6. Enter a date range or use the academic year to set the dates for the conference
7. Make any changes to the duration or recurrence pattern
8. Information in the original conference will be copied to the new conference. Click on a tab to review the contents.
9. When you are satisfied with the configuration, go to the bottom of the page and select *Use default roster configuration* to pick up new information, such as the residents' new status, rotation and any new people in your program
10. Click **Save**

REVIEW SURVEYS

Why is this important?

- Create a new survey to collect feedback on speakers and conferences
- Edit existing surveys for accuracy and thoroughness

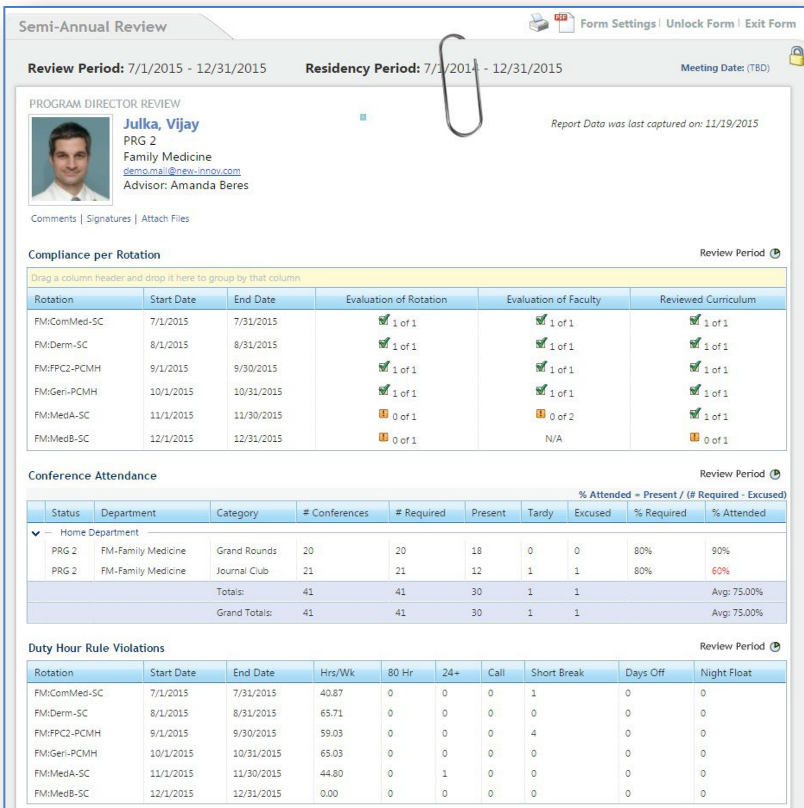


SEMI-ANNUAL REVIEWS

CHECK REVIEW FORMS

Why is this important?

- Your program may have changed policies or procedures. Make sure they're included in the form widgets.
- Edit the widgets used to ensure correct data is reported



Semi-Annual Review

Form Settings | Unlock Form | Exit Form

Review Period: 7/1/2015 - 12/31/2015 **Residency Period:** 7/1/2014 - 12/31/2015 Meeting Date: (TBD)

PROGRAM DIRECTOR REVIEW

Julka, Vijay
PRG 2
Family Medicine
demo.mail@new-innov.com
Advisor: Amanda Beres

Report Data was last captured on: 11/19/2015

Comments | Signatures | Attach Files

Compliance per Rotation

Review Period

Drag a column header and drop it here to group by that column

Rotation	Start Date	End Date	Evaluation of Rotation	Evaluation of Faculty	Reviewed Curriculum
FM:ComMed-SC	7/1/2015	7/31/2015	1 of 1	1 of 1	1 of 1
FM:Derm-SC	8/1/2015	8/31/2015	1 of 1	1 of 1	1 of 1
FM:FPC2-PCMH	9/1/2015	9/30/2015	1 of 1	1 of 1	1 of 1
FM:Geri-PCMH	10/1/2015	10/31/2015	1 of 1	1 of 1	1 of 1
FM:MedA-SC	11/1/2015	11/30/2015	0 of 1	0 of 2	1 of 1
FM:MedB-SC	12/1/2015	12/31/2015	0 of 1	N/A	0 of 1

Conference Attendance

Review Period

% Attended = Present / (# Required - Excused)

Status	Department	Category	# Conferences	# Required	Present	Tardy	Excused	% Required	% Attended
Home Department									
PRG 2	FM-Family Medicine	Grand Rounds	20	20	18	0	0	80%	90%
PRG 2	FM-Family Medicine	Journal Club	21	21	12	1	1	80%	60%
		Totals:	41	41	30	1	1		Avg: 75.00%
		Grand Totals:	41	41	30	1	1		Avg: 75.00%

Duty Hour Rule Violations

Review Period

Rotation	Start Date	End Date	Hrs/Wk	80 Hr	24+	Call	Short Break	Days Off	Night Float
FM:ComMed-SC	7/1/2015	7/31/2015	40.87	0	0	0	1	0	0
FM:Derm-SC	8/1/2015	8/31/2015	65.71	0	0	0	0	0	0
FM:FPC2-PCMH	9/1/2015	9/30/2015	59.03	0	0	0	4	0	0
FM:Geri-PCMH	10/1/2015	10/31/2015	65.03	0	0	0	0	0	0
FM:MedA-SC	11/1/2015	11/30/2015	44.80	0	1	0	0	0	0
FM:MedB-SC	12/1/2015	12/31/2015	0.00	0	0	0	0	0	0

1. Review the templates and make any necessary adjustments by adding/deleting/editing the widgets
2. Schedule the reviews – suggested time periods:
    a. July – December; and
    b. January – June

Editing Form Templates

1. Click **Portfolio**
2. Under Reviews, select **Form Templates**
3. Choose **Edit** next to the template to customize
4. You can change the name for your review template, change your widgets, and change other options you selected when creating your template
5. Click **Save**

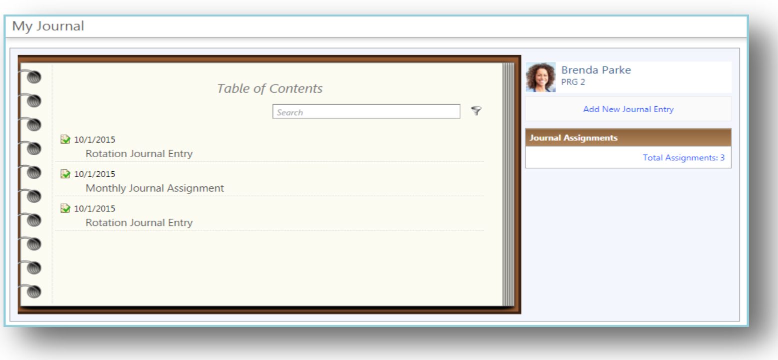
Scheduling Reviews

1. Select **Portfolio**
2. Under Reviews, select **Manage Reviews**
3. Click **New**
4. Choose to design a **New Form Template** or use an existing **Form Template**
5. Click **Continue**
6. Click **Add People**
7. Move the subject names in the left column to the right column to include in the review by **clicking and dragging** or by **highlighting** the name and using the arrow keys
8. Click **OK** when subject selection is complete
9. Entering the **start** and **end** date of the review period
10. Set the meeting date if desired
11. Click **Add Review Period**
12. Enter as many review periods as needed
13. Click **Continue**
14. Confirm which reviews to schedule and click **Schedule Selected Reviews**

JOURNALS

Why is this important?

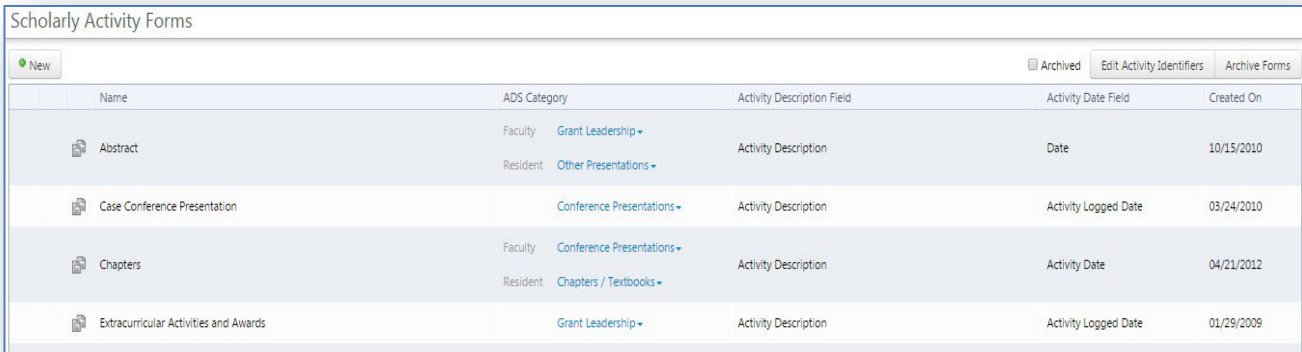
- Keep journaling assignments current



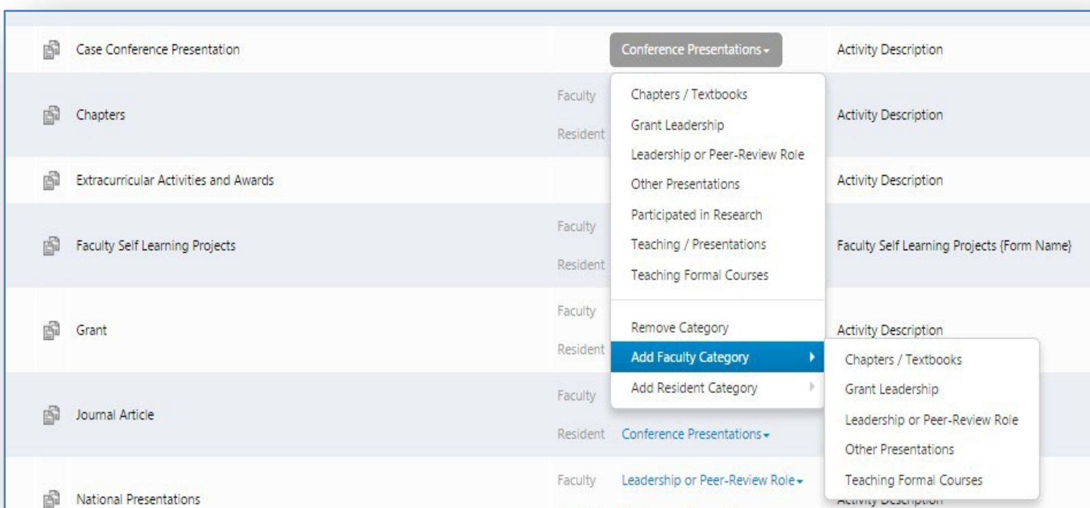
SCHOLARLY ACTIVITY

Why is this important?

- Verify that Forms are current
- Add new Forms or archive those no longer used
- Confirm all ADS categories are added to the right forms



Check ADS Categories for Residents and Faculty



CHECK FOR MILESTONE REVIEWS

Milestone Reviews are automatically created for each 6-month review period (December and June). These are available on July 1 and Jan 1, respectively, of each academic year for each of your residents and fellows.

Why this is important?

- After July 1, check the list of residents/fellows to make sure everyone is included
- For off-cycle residents, check the Training Records in their Personnel files for correct date

Sample Milestone Review: