2026

New Innovations (RMS) Agreements Training

MMCGME

Metro MN Council on Graduate Medical Education

Table of Contents

Intro to Agreements

What is an Agreement

According to the ACGME, programs and institutions are required to have Program Letters of Agreement (PLA) in place if they send residents to other locations to train. The agreement defines the relationships between programs and sites that participate in Graduate Medical Education.

Agreements should:

- Identify the faculty
- Outline faculty responsibilities
- Define the duration and content of the education experience at the affiliate location
- Outline the policies and procedures for resident education.

The Agreements module in New Innovations is a resource for GME and program administrators to store and track agreements between:

- Programs and Affiliate Training Locations
- Sponsoring Institutions and Affiliate Training Locations in the Software. Agreement templates, such as contracts with blank signature lines can be uploaded for continual use. Or a scanned contract with completed signatures can be stored.
- Institutions/Locations

  Each institution that you have an agreement with should be entered in the institution/location section of Administration. Also enter the contact information so you can run the contacts report.

Milestones and Dates

A 'milestone' in agreements are events such as when the agreement has been signed by a specific person, when an agreement is waiting for a signature, or when it is approved and finalized. Milestones are set by each institution. Using this feature lets you see at a glance the status of an agreement in the list. In addition, you can record the start and end dates for each agreement and the date the agreement was approved.

Access:

Level 6 - View/Modify/Create Agreement types, agreement milestones, agreement notifications, program agreements, institution agreements & agreement reports.
Level 5 - View/Modify/Create program agreements and agreement reports; View agreement types, agreement milestones & institution agreements.
Level 4 - View/Modify program agreements; View agreement types, agreement milestones & institution agreements.
Level 3 - N/A
Level 2 - N/A
Level 1 - View program and institution agreements.

The privilege level presets for Low-Level Administrator and Faculty will not automatically have access to the Agreements module, so if a low-level admin or faculty needs to see them, give them Level 4 in Agreements which will give them view/edit access. They will not be able to create new agreements.

1. **Go to Personnel > Personnel Records**
2. Select the person
3. Click Security & Privileges
4. Click Edit
5. Check the box for Level 4 in Agreements. (Leave the other check boxes as is)
6. Click Save and Return

Creating Agreement Milestones

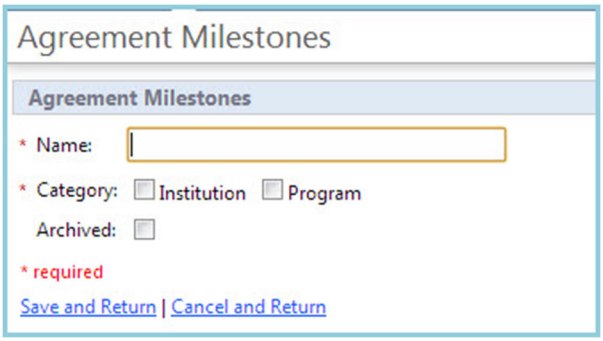
Not to be confused with ACGME Milestones, Agreement Milestones represent significant steps in the agreements process, such as when particular signatures are gathered. These milestones can be edited, deleted, archived, and exported to Excel from the Milestones tab.

You don't need to create Agreement Milestones for these states:

- Approval—This milestone is effectively documented as the 'Approval Date' when you create an agreement.
- Renewal—To renew an agreement, create a new agreement interval

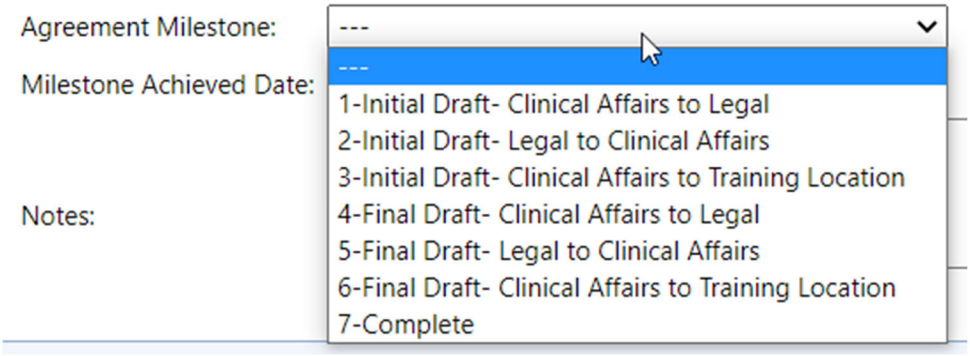
Create Agreement Milestone

1. **Go to Administration > under Agreements: Setup > Milestones tab**
2. Click New
3. Enter Milestone name
4. Select the Category
5. Click Save and Return



Control order of Milestones

You cannot control the order in which Agreement Milestones can be selected, but you can influence it.

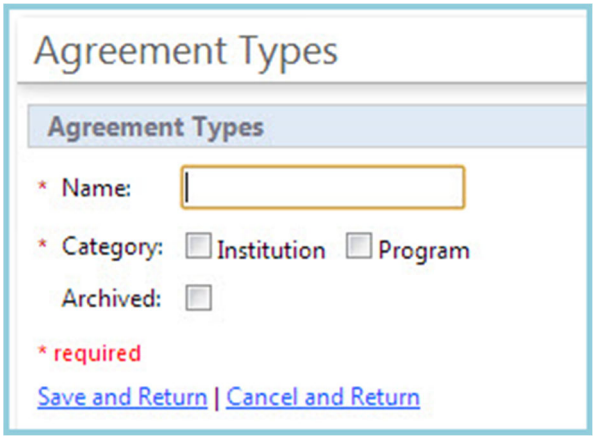


Add a number to the beginning of each Agreement Milestone's name. This affects the order they display in the dropdown and can help convey the intended sequence.

Creating Agreement Types

Agreement types are used to organize and categorize program and institution agreements for tracking and reporting purposes. The Program Level Agreement (PLA) and Master Affiliation agreement types have already been created for you. They cannot be deleted or edited, but they can be archived if you don't need them. You can create as many additional agreement types as you need.

1. **Go to Administration > under Agreements: Setup**
2. Click New
3. Enter Agreement Type name
4. Identify it as a program or institution agreement
5. Click Save and Return

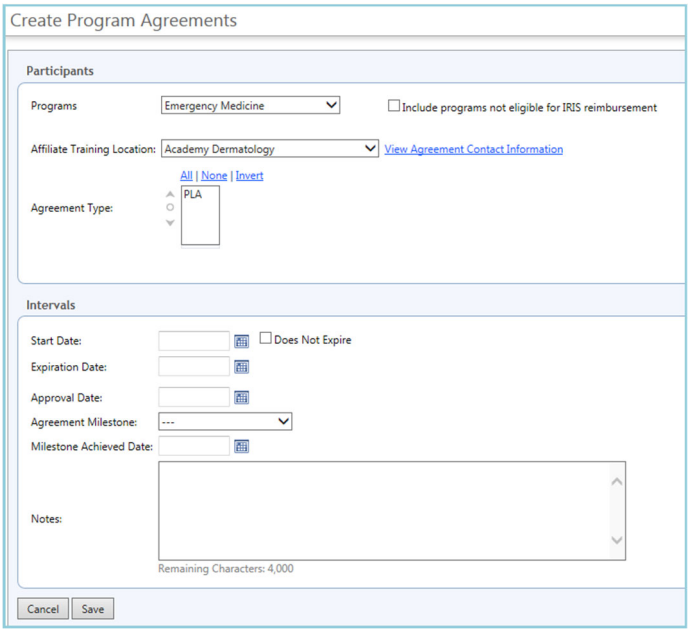


Creating Program Agreements

Your programs may have business arrangements with outside institutions to train learners. These arrangements define the relationships between sites that participate in the education of the resident or fellow. In New Innovations, you can use the Agreements feature in the Administration module to record and monitor these Agreements during and after the negotiation and signing phase.

Create a Program Agreement

1. **Go to Administration > Agreements column: Program**
2. Click New
3. Participants:
   a. Select a program
   b. Select an affiliate training location
   c. Select an Agreement Type - PLA (Program Level Agreement) or a type associated with 'PLA'
4. Intervals:
   a. Enter the start date and expiration date for the current interval (These are the dates that the agreement is in effect. If the interval does not expire, check the 'Does Not Expire' box.)
   b. Enter the Approval Date
   c. Select the Milestone
   d. Select the Milestone Achieved date (This can be updated later if the milestone has not been achieved yet)
   e. Enter any Notes
5. Click Save

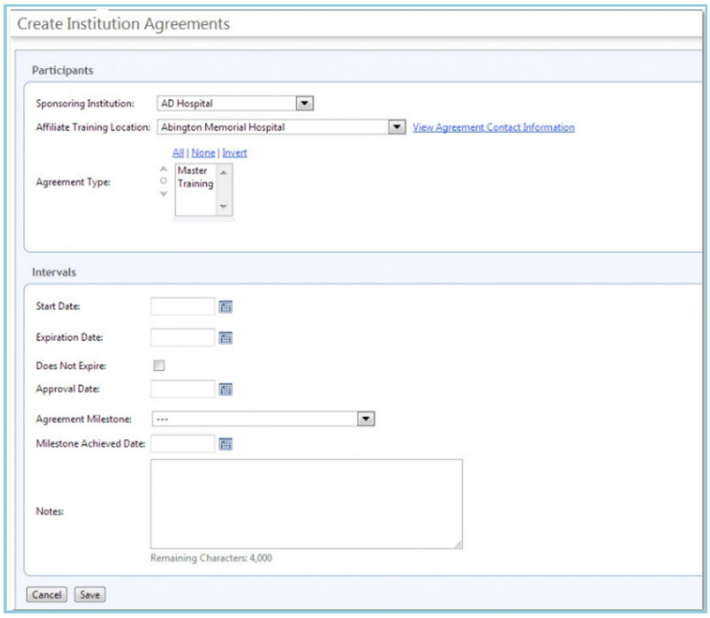


Creating and Editing Institution Agreements

This section of the software permits you to store information about agreements between institutions and affiliate locations where resident or fellow training takes place. Only people with Privilege Levels of 6 are able to create institution agreements. However, people with Privilege Levels of 1, 4 and 5 can view Institutional Agreements and Agreement Intervals with documents attached to them.

Create Institution Agreement

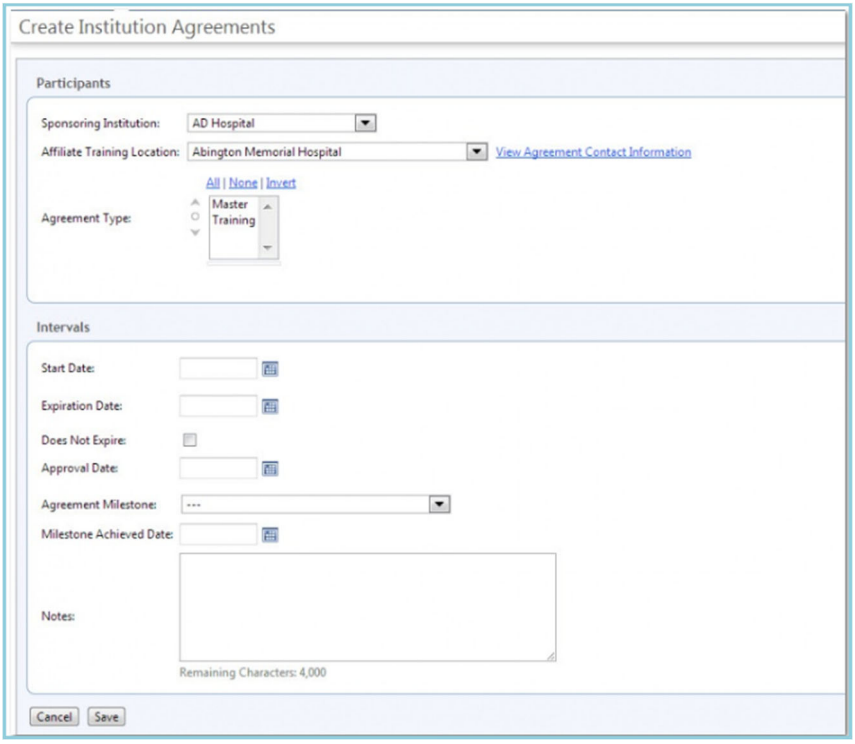
1. **Go to Administration > under Agreements: Institution**
2. Click New
3. Select Sponsoring Institution
4. Select Affiliate Training Location
5. Select Agreement Type
6. Enter the start date and expiration date for the current interval. The start and expiration date are the dates that the agreement is in effect (or if it does not expire check the 'Does Not Expire' box)
7. Enter the Approval Date. This date can be entered later if still waiting on approval. However, no expiration notifications will be sent if this field is blank.)
8. Select the Milestone
9. Select the Milestone Achieved date (or this can be entered later if still in process)
10. Enter any Notes
11. Click Save



Update Institution Agreement

1. **Go to Administration > under Agreements: Institution**
2. Click Edit in front of the Agreement
3. You can Edit the Interval to update the Milestone
4. Documents can be uploaded and attached to the Agreement as well

Notes:
The Sponsoring Institution list is populated by the Institutions/Locations list in Administration. The Affiliate Training Location typically represents the physical location where trainees participate in learning experiences.
If an institution does not appear in the list, go to Administration > Software Setup > Institutions/Locations and check the 'Training Location' box for the institution
See File Manager article for instructions on how to upload a document to Agreements



Upload and File Manager

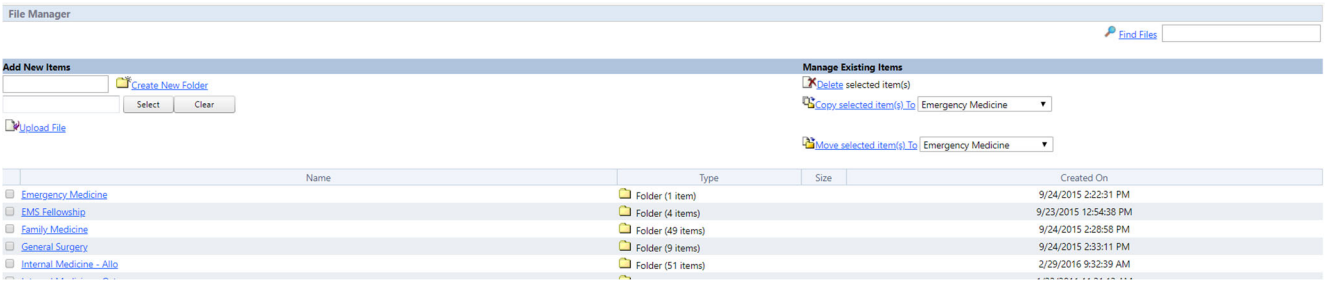
Set Up

The file manager offers administrators a place to upload and store relevant agreements documents.

1. **Go to Administration > Agreements > File Manager**
2. Enter a folder name and click Create New Folder
3. Click Select to browse your computer and find file
4. Click Upload File

Delete a File or Folder

1. Check the box to the left of the file or folder you want to delete. If you delete a folder containing files, all the files will be deleted too
2. Click Delete
3. Click OK



Search

Enter a letter, a word, or part of a word known to be contained in a file name, and then click the Find Files link. Search terms are not case sensitive.

For the most reliable search results, search ONLY from top level of your folder hierarchy. Click the Parent Folder link at the top of the screen until you see the '/' symbol.

To return to the File Manager, click on the Return to Previous Page link.

Agreements Notifications

You can set up and designate who receives agreement notification emails and/or Home page notifications when agreements are expiring. You can also configure how far in advance notifications will be sent and how frequently after the initial notification that reminder email is sent.

An approval date must be entered in the Agreement for expiration notifications to be sent. Go to Institution or Program. Click edit next to the agreement without an approval date. Click Edit, fill in the approval date and click Save.

- Notifications will be sent as configured for every agreement associated with the selected agreement type.
- The initial notification can be sent from 1 through 180 days in advance of the expiration date.
- The follow-up email can be sent from 1 through 14 days after the initial email.
- The number of days entered into the follow-up email box must be smaller than the number entered into the initial email notification box.
- The expiration date is entered when creating an Agreement Interval.

If you selected an agreement type associated only with the Institution Category, you can choose to notify any administrator (or any personnel by clicking Show all Personnel).

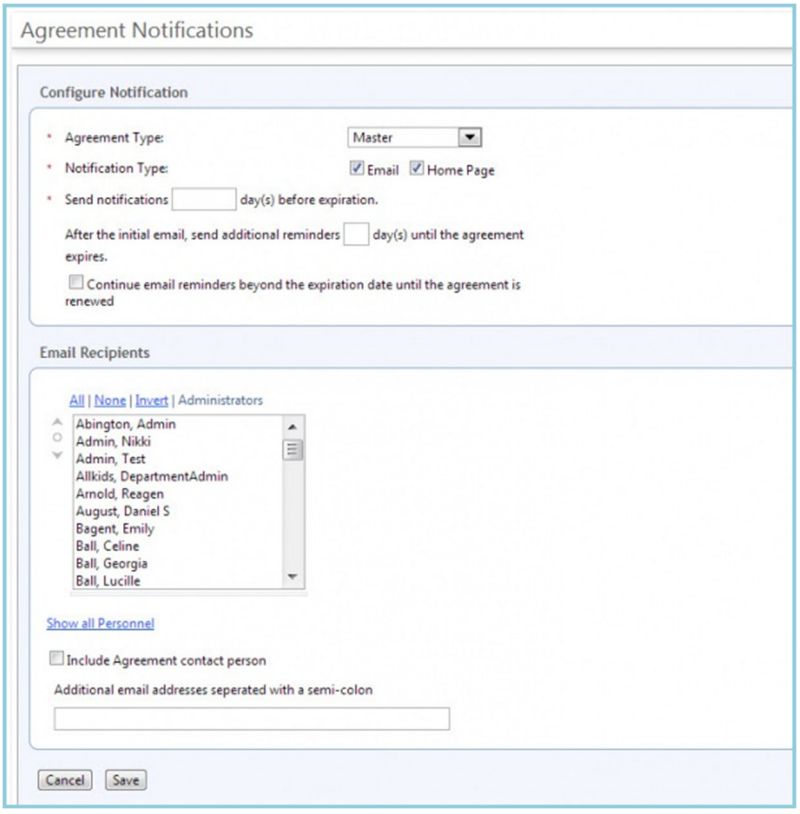
If you selected an agreement type associated only with the Program Category, you can select notification recipients by status type. Once you choose the status, you can perform a "view only" of selected personnel by clicking Show included Personnel. Statuses that you choose to receive email notifications will receive a notification for their program's expiring agreement.

You can also enter email addresses in the provided field. Please separate multiple addresses with semi-colons. Anyone whose email address is entered here may receive notifications regardless of their Department, program membership, status type, their privileges, or whether they even have access to New Innovations.

Individuals appear in the personnel lists regardless of whether or not they have a primary email address entered into their personnel data record. If there is no primary email address listed for them, they will not receive an email notification; however, they can still receive a home page notification if home page notifications are enabled.

Setup Notifications

1. Go to Administration > Agreements > Setup
2. Access the Notifications tab
3. Click New
4. Select Agreement Type
5. Select Notification Type
6. Enter number of days prior to expiration for notice to be generated (this is the number of emails that will be sent up until the agreement expiration date. If the expiration date comes before the number of emails has been sent, they will stop anyway)
7. Enter how often follow up reminders should be generated
8. Check the box to Continue email reminders until the agreement expiration date is updated
9. Select recipients
10. Check the box to include the Agreement contact person
11. Optional: Add email addresses for people who are not in the database but need to be informed
12. Click Save



Program Agreements Report

View active and expired Agreements between Programs and Training Locations.

1. **Go to Administration > Agreements > Program**
2. Access the Report tab
3. Select the appropriate programs
4. Select the appropriate affiliates
5. Set the filter to include active, expired or both active and expired agreements
6. Optional: Check to include archived or historical intervals
7. Optional: Check to include department/division column and interval notes column
8. Click View Report

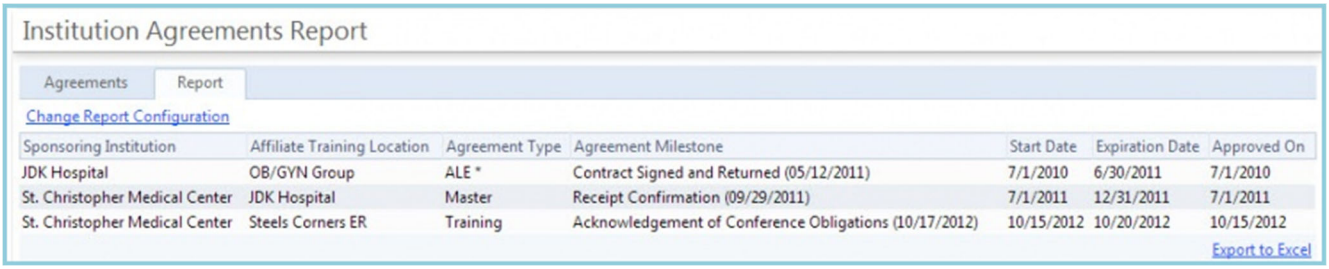
Notes:

- Only approved Program Agreement Intervals will be included in reports. Approval is indicated by entering an 'Approval Date' when creating an Agreement Interval.
- Active agreements are those containing one or more approved agreement intervals that have not expired. Expired agreement intervals will be excluded from the report unless you select the Include Historical Intervals option below.
- Expired agreements are those containing only expired and approved agreement intervals. Only the most recently expired agreement interval will be listed. If you would like to view all expired agreement intervals within all expired agreements, select the Include Historical Intervals option.

Institution Agreement Reports

Agreement reports are available to view active and expired agreements on one page.

1. **Go to Administration > Agreements > Institution**
2. Access the Report tab
3. Select the appropriate sponsors
4. Select the appropriate affiliates
5. Set the filter to include active, expired or both active and expired agreements
6. Optional: Check the box to include archived or historical intervals
7. Optional: Check the box to include interval notes column
8. Click View Report
9. Click Change Report Configuration to choose different filters



Notes:

- Only approved Institution Agreement Intervals will be included in reports. Approval is indicated by entering an 'Approval Date' when creating an Agreement Interval.
- Active agreements are those containing one or more approved agreement intervals that have not expired. Expired agreement intervals will be excluded from the report unless you select the Include Historical Intervals option below.
- Expired agreements are those containing only expired and approved agreement intervals. Only the most recently expired agreement interval will be listed. If you would like to view all expired agreement intervals within all expired agreements, select the 'Include Historical Intervals' option.

Contacts Report

The Contacts Report displays the following information about your agreements:

- Institution/Location
- Contact Name
- Telephone
- Fax
- Email
- Address

Generate Report

1. **Go to Administration > Agreements > Contacts Report**
2. Select the Training Locations
3. Click View Report