Changing Program Coordinators

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When a new Program Coordinator starts using New Innovations, there are some things that need to be updated in the software to ensure a smooth transition. Items in blue need to be completed by MMCGME Services. Contact them at RMSHelp@umn.edu. Items in black may be completed by coordinators.

MMCGME Updates Tasks by Module

These are tasks that the MMCGME team needs to when a new coordinator starts in a program.

Personnel

Archive or Move Former Coordinator's Record.

1. Go to Personnel > Personnel Records
2. Select the former coordinator's record
3. Select one:
    1. Archive Record
        1. Click Email Addresses, click Delete
        2. Click Archive Record. (This will remove the person's username and password so they can no longer log into New Innovations.)
    2. Move Person to Different Department
        1. Click Basic Information, select new Dept/Div and click Save and Return
        2. Click Security & Privileges. Click New. Select the new Department. Select the Program Administrator/Coordinator preset. Click Apply Preset and Save and Return.
        3. Optional: Click Delete in front of the former Dept/Div if the person should no longer have access to those records.
    3. Change the person listed as the Coordinator in the Personnel listing

        1. Go to Administration > Program
        2. Click Personnel
        3. Click Change Coordinator
        4. Select the new coordinator from the dropdown list
    4. Change the person listed as the Email Administrator

        1. Go to Administration > Software Setup
        2. Under Local Setup, click Email Notification

    3. In the Email Administrator field, select the new coordinator
    4. Optional: Make any necessary changes to the 'Introductory Message'
    5. Click Save
    6. For each of the tabs (Certifications, Contracts, etc), enter the new coordinator's email address
    7. Click Save
5. Change the person notified when recurring Academic Years are created
    1. Go to Administration > Software Setup
    2. Under Local Setup, click Academic Years
    3. Click the Recurring tab
    4. Click on a row
    5. Change the email address
6. Click Save

Coordinator tasks at the Program Level

Coordinators may make the following updates!

Update the notifications within Checklists.

1. Go to Personnel > Checklist > Onboarding/Advancement/In-Rotator
2. Click the Notifications tab
3. Select the type of Notification:
    - Initial - Check the custom message
    - Reminder - Check the CC Options and the custom message
    - Complete - Check the custom message
    - Administrative - Check the Recipients
4. Click Save

Evaluations

Change the email address in each session

1. Go to Evaluations > Session Manager
2. Click the name of a session
3. Click the Settings tab
    1. Under the Email Settings section, change the Administrator email address in 4 places to the new coordinator
    2. Optional: Click Customize to make any necessary changes to a customized message
    3. Click Save Changes
4. Click the Match Session tab

    1. In the Automatic Matching section, edit the email address
    2. In the End of Session Settings section, edit the email address
    3. Click Save Changes
5. Repeat this process for each session

Change email address for High/Low Score notification

1. Go to Evaluations > Evaluation Forms
2. Beside a from, click Actions > Edit
3. Click Formatting
4. In the High/Low Score Notifications section, click Edit notifications
5. Deselect the box for the former coordinator
6. Check the box for the new coordinator
7. Click Save
8. Repeat this process for each form with High/Low Notifications

Duty Hours

Check the CC Recipients and Custom Messages for Logging Notifications

1. Go to Duty Hours > Setup > Notifications
2. Under the Logging panel, click Edit
3. Make any changes necessary:
    1. In the 'Message Body' field
    2. For 'CC Recipients'
4. Click Save

Check the cc Recipients and Custom Messages for Sign off Notifications

1. Under the Sign off panel, click Edit
2. Make any changes necessary:
    1. In the 'Message Body' field
    2. For 'CC Recipients'
3. Click Save

Procedure Logger

Change administrative email alerts

1. Go to Logger > Setup > Configuration

2. In the 'Notifications' section, if Administrative Email Alerts are 'Enabled,' change the email address
3. Click Save Configuration

Conferences

Change administrative emails for Attendee Notifications, Speaker Notifications and Survey Notifications.

Attendee Notifications

1. Go to Conferences > Manage Conferences
2. Click on a conference
3. Click Edit
4. Click the Attendee Notifications tab
5. Click the Pencil icon in front of a Notification
6. Make the necessary changes to the email address and custom message
7. Click Update Notification in Grid
8. Check the box to apply these changes to other conferences in the series
9. Click Save

Speaker Notifications

1. Click the Speakers tab
2. Click the Pencil icon in front of a Notification
3. Make the necessary changes to the email address and custom message
4. Click Update Speaker in Grid
5. Check the box to apply this change to other conferences in the series
6. Click Save

Survey Notifications

1. Click the Survey Settings tab
2. In the 'Administrative Emails' section, change the email address to the new coordinator's address
3. Check the box to apply this change to other conferences in the series
4. Click Save

Administration

Change email address in Agreements

1. Go to Administration > Agreements > Setup
2. Click the Notifications tab
3. Click Edit
4. In the Email Recipients section, make changes in the 'Administrators' box or the 'Addition email addresses' field
5. Click Save