

## Monthly Checklist

- For programs that are on rotation protocol – please follow the steps highlighted in blue. Also, notify [RMSHelp@umn.edu](mailto:RMSHelp@umn.edu) immediately if there are changes to a rotation’s location(s).
- For programs not using rotation protocol, please follow all steps.

### MONTHLY -- By the last working day of each month

Activity	Recommended Actions/Tools
1. Ensure that all resident time has been entered and approved for the month, including: <ul style="list-style-type: none"> <li>▪ <a href="#">Duty hours</a></li> <li>▪ <a href="#">Vacation/sick leave</a></li> </ul>	<b>Review the Duty Hours Usage Report</b> <ol style="list-style-type: none"> <li>1. From the top menu ribbon, click <b>Duty Hours</b>, then <b>Reports</b>.</li> <li>2. Under <i>Usage</i>, select <b>Usage Summary</b>.</li> <li>3. Review individual residents’ duty hours</li> </ol> <b>Look for:</b> <ul style="list-style-type: none"> <li>• Low hourly totals (&lt;160 per month, or appropriate hours for your program)</li> <li>• Gaps of &gt;2 days for which time needs to be logged</li> <li>• Unapproved hours</li> <li>• Overlaps</li> </ul>
2. Review schedules for any time away that will extend training (leaves of absence, FMLA, etc.). <ul style="list-style-type: none"> <li>▪ Add the <b>MMCGME – Time Away Extends</b> rotation to the block schedule for any resident who falls into this category.</li> <li>▪ Fill out MMCGME <a href="#">Time Away Extends</a> form.</li> </ul>	Edit the block schedule to add MMCGME – Time Away Extends rotation to resident’s block schedule. From the top menu ribbon, select <b>Schedules</b> and click <b>Schedule Rotations</b> . <ol style="list-style-type: none"> <li>1. Select the Person and Academic Year from the dropdown menus.</li> <li>2. Scroll down to the list of Rotation Intervals and check those you need to edit. Then click the <b>Edit</b> link.</li> <li>3. To create a split block rotation within a selected interval, change the existing start/end dates to create a “gap” in the schedule. Add the new rotation information to the created gap.</li> <li>4. Edit the Rotation Intervals. Click <b>SAVE</b> at the bottom of the screen.</li> </ol>
3. Run a <b>Block Gap Locator Report</b> to check for scheduling gaps. Ensure rotations are listed as primary and that there are no unspecified rotations (rotations without a name). There should be no gaps for any previous months through the upcoming month. <p>Use <b>MMCGME Rotations</b> for situations where the resident/fellow is:</p> <ul style="list-style-type: none"> <li>▪ Starting the program late</li> <li>▪ Graduating early</li> <li>▪ On a leave that will extend training</li> <li>▪ Resigned before the academic year ends</li> </ul>	If any gaps appear for previous months through the upcoming month, adjust the rotation so that there are no dates within the Academic year that are not covered by a rotation. <p><b>Gap Locator Report:</b> From the top menu ribbon, click <b>Schedules</b>, in the <i>Block Scheduling</i> box, click <b>Gap Locator</b>.</p>
4. Remove any generic Elective rotations and replace with the rotation the trainee ended up doing. Generic Elective rotations for rotation protocol are not configured and will not generate FTE’s.	Edit the block schedule to add the correct rotation. From the top menu ribbon, select <b>Schedules</b> and click <b>Schedule Rotations</b> . <ol style="list-style-type: none"> <li>1. Select the Person and Academic Year from the dropdown menus.</li> <li>2. Check the box next to the generic elective, then click the Edit link.</li> <li>3. Edit the Rotation Interval(s) and replace the generic elective with the correct rotation. Click <b>SAVE</b> at the bottom of the screen.</li> </ol>

<p>5. Review life events for residents/fellows and provide the appropriate documentation to MMCGME for events including:</p> <ul style="list-style-type: none"> <li>▪ Off-cycle graduations</li> <li>▪ Terminations/resignations from the program</li> <li>▪ New hires</li> <li>▪ Name changes</li> </ul>	<p><b>Required Documentation:</b> Copies must be sent to MMCGME within one month after the resident begins the program.</p> <ul style="list-style-type: none"> <li>▪ <u>Graduations</u>: Completion Certificate/Termination Form with graduation date listed</li> <li>▪ <u>Terminations/Resignations</u>: Termination Form with last date in program and Completion Certificate</li> <li>▪ <u>New Hires</u>: Provide the following information: <ul style="list-style-type: none"> <li>• First, middle, last name</li> <li>• Program name</li> <li>• Program start and end dates</li> <li>• Previous program information</li> <li>• Medical school name and graduation date</li> </ul> </li> <li>▪ <u>Name Changes</u>: Provide proof of the change (e.g., copy of new Social Security Card or Marriage License)</li> </ul>
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**All resident/fellow time for the previous month must be entered and approved by the 5<sup>th</sup> working day of the new month.**

# Yearly Checklist

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

Activity	Recommended Actions/Tools
<p>Ensure that copies of the following reimbursement and audit-related documents for all residents/fellows are on file with MMCGME Services:</p> <ul style="list-style-type: none"> <li>▪ RMS Data Form</li> <li>▪ Medical School Diploma</li> <li>▪ Copies of all certificates for prior completed GME programs</li> <li>▪ Contract/Residency Agreement</li> <li>▪ ECFMG Certificate (for graduates of foreign medical schools)</li> <li>▪ Curriculum Vitae</li> </ul>	<p>Submit required documents to MMCGME Services to: <a href="mailto:RMSHelp@umn.edu">RMSHelp@umn.edu</a></p>

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

Activity	Recommended Actions/Tools
<p>Ensure that copies of the following audit-related documents for all residents/fellows are on file with MMCGME Services:</p> <ul style="list-style-type: none"> <li>▪ Residency/Fellowship Completion Certificate (after program completion)</li> <li>▪ Termination/Resignation Form</li> <li>▪ Time Away Extends Documentation (if program was extended due to time away)</li> </ul>	<p>Submit required documents to MMCGME Services to: <a href="mailto:RMSHelp@umn.edu">RMSHelp@umn.edu</a></p>

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

Activity	Recommended Actions/Tools
<p>1. Create an academic year for your residents/fellows, and add intervals for each block rotation.</p>	<p><b><u>Steps to Create Academic Year and Add Intervals</u></b></p> <ul style="list-style-type: none"> <li>● From the top Menu ribbon, select <b>Administration &gt; Software Setup &gt; Academic Years</b></li> <li>● Click <b>New</b>.</li> <li>● Enter a name for the Academic Year and set the date range.</li> <li>● Select the number of intervals that will compose your Academic Year, rename the intervals and edit the interval dates if necessary.</li> <li>● Click the <b>Save</b> link at the bottom of the screen.</li> </ul>
<p>2. Create a block schedule for each resident/fellow. Please note the unique deadline dates for block schedule entry <a href="#">here</a>.</p>	<p><b><u>Steps to Create Block Schedule</u></b></p> <ul style="list-style-type: none"> <li>● Select <b>Schedules</b> from the top Menu ribbon and click <b>Schedule Rotations</b>.</li> <li>● Select a person from the <b>Person</b> drop-down box.</li> <li>● Then select an <b>Academic Year</b> from the Academic Year drop-down box. You may only create rotations for the selected Academic Year.</li> <li>● Next, select one of the three options for building a Block Schedule for the selected individual.</li> <li>● Verify that the following fields are correct:             <ul style="list-style-type: none"> <li>● Start and End Date</li> <li>● Person Status</li> <li>● Home Department</li> <li>● Program</li> </ul> </li> </ul>

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|  | <ul style="list-style-type: none"><li>• Post Graduate Year</li><li>• Select a Rotation from the list that will be assigned to this interval.</li><li>• Click <b>SAVE</b> at the bottom of the page.</li><li>• Repeat these steps to build each resident/fellow's block schedule.</li></ul> |
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