

Preparing for a New Academic Year Guide

Metro Minnesota Council on Graduate Medical Education



Meet The Team

MMCGME (Metro Minnesota Council on Graduate Medical Education) is here to provide customer support on the RMS software, assist hospitals with CMS audits, bill hospital sponsors, support training sites, and more.

MMCGME Website: <https://www.mmcgmeservices.org/>
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Required Tasks

- How to create a new academic year
- How to perform an ERAS import
- How to review and update program personnel
- How to create program specific onboarding checklists
- Review the MMCGME Data Policy
- The importance of the block schedule
- How to create and add personnel to a block schedule
- How to review rotation names
- How to set up rotation favorites
- Review the MMCGME rotations

How to Create a New Academic Year

Location in RMS: Administration > Software Setup > Academic Years (under Local Setup)

Training Manual: Page 5

Tips/Tricks:

- **Primary:**
 - The primary academic year is the year that is used for the majority of your schedules. Marking an academic year as primary keeps it at the top of the list of academic years to choose from and it allows your department to enable the Work Hours Signoff feature.
- **Hidden:**
 - Hidden academic years are only visible to administrators. Check the box to work on schedules and prevent residents and faculty from seeing them. Remember to come back and unhide the academic year when you're ready to make your schedules available to all users.
- **Recurring:**
 - Setting up a recurring academic year can be useful if your academic years start dates, intervals, etc. are always the same.
- Intervals can be split up ranging from 1 interval, all the way up to 53.

How to Perform an ERAS Import

Import ERAS Data

Set Import Values

The following settings will be used to configure all personnel records for this import.

Program Initial Program

When did the program begin or when will it start?
Start Date Training level advancement

Complete the following details based on the start of the program.

Status

PGY

Employer

Compensation Status

Start/Hire Date

Generate Usernames and Passwords on import

You will be able to verify the data prior to import.

ERAS API

Connect to the secure ERAS API service and retrieve your data.

Accrediting Body
Accreditation #

Location in RMS: Personnel > Import ERAS Data
Training Manual: Pages 12-14

Tips/Tricks:

- Review start date for accuracy
- Start Date of the program and the Start/Hire Date should be the same
- If you have trainees that start the program on different dates, enter the earliest Start Date
 - The trainees with off-cycle start dates will have their Start Dates adjusted in RMS during the Data Exchange



How to Review and Update Faculty Records

Location in RMS: Personnel > Personnel Records
Training Manual: Page 15

Tips/Tricks:

- Review list of faculty under the dropdown menu
- If you have faculty that can be archived, complete this [form](#) to notify MMCGME
- If you would like a report (excel document) with details of your program’s faculty members, contact MMCGME at MMCGMEHelp@umn.edu



How to Create Program Specific Onboarding Checklists

Location in RMS: Personnel > Onboarding (under Checklists)

Training Manual: Pages 15-20

Tips/Tricks:

- Copy over your program's previous year onboarding checklist and use that as a starting template
- If your program is starting from scratch, ask another program administrator to copy over their checklist to your program, or you can search existing steps within the checklist
- If you are asking the trainee to upload a file to a step, uncheck the "Recipient can mark as complete" box
 - This way, you will need to review the uploaded document before it's save to their personnel record files and notes and before the step is marked as complete



Required Data Policy

Navigating MMCGME Website: Resources and Forms > Policies > Required Data & Documentation Policy

Direct Link: [MMCGME Policies - mmcgm services](#)

Tips/Tricks:

- Under the “Required Data Details” tab
 - You will find not only what data is required in be inputted into RMS for the trainees, but also who is responsible for what (Program Administrator vs MMCGME)
- History:
 - 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
- Purpose:
 - 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

REQUIRED DATA & DOCUMENTATION STANDARD POLICY

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:



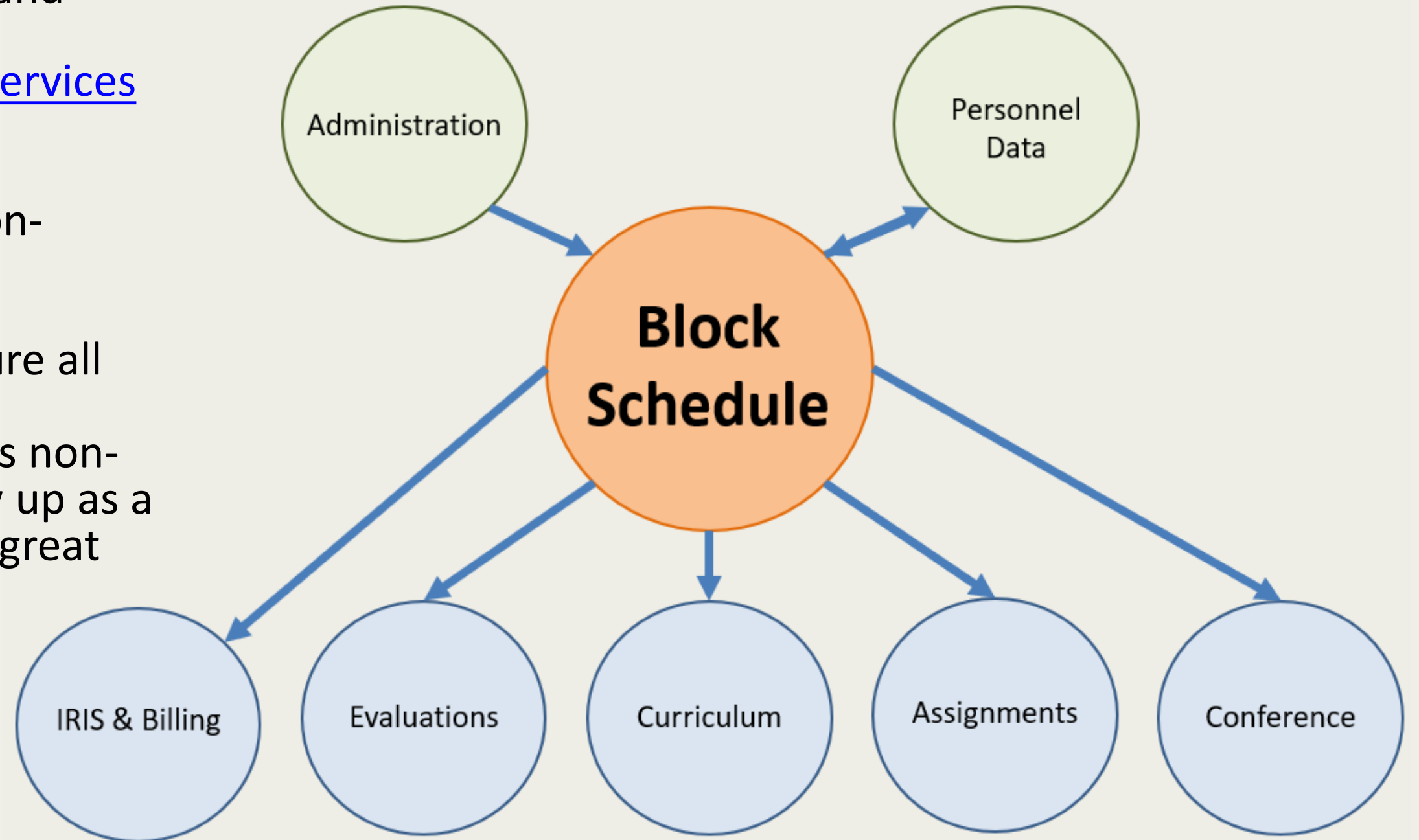
Importance of the Block Schedule

Navigating MMCGME Website: Resources and Forms > Policies > Block Schedule Policy

Direct Link: [MMCGME Policies - mmcgme services](#)

Tips/Tricks:

- Mark rotations that are indicated as “Non-Primary Rotation Only” as non-primary rotations
- Run monthly gap locator reports to ensure all dates are accounted for
- Mark elective or placeholder rotations as non-primary. This allows them to easily show up as a gap in the gap locator report, which is a great monthly reminder!



How to Create a Block Schedule

Location in RMS: Schedule > Schedule Rotations
Training Manual: Pages 30-32

Tips/Tricks:

- Use option One if you are ready to enter an ENTIRE academic year schedule for a trainee
- Choose option Two if you only want to enter a few rotations at a time with the set intervals
- Option Three allows you to enter a new interval (different than what was setup with your academic year intervals) and schedule one rotation at a time
 - This option is good for adding non-primary rotations, such as vacation time

Create rotation intervals using one of these options:

[Option One:](#)

Add default intervals for the selected academic year.

or

[Option Two:](#)

Add default intervals for the selected academic year one interval at a time.

or

[Option Three:](#)

Add a new interval.

How to Review Rotation Names

Location in RMS: Schedule > Rotation Names (under setup)

Training Manual: Pages 24-27

Tips/Tricks:

- It is recommended that you review your rotations prior to the start of every academic year
- If you need new rotations added or current rotations archived, use this [form](#) to submit your request to MMCGME
- Rotation naming standard is shown below

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.

How to Create Rotation Favorites

Location in RMS: Schedule > Rotation Favorites (under setup)

Training Manual: Pages 28-29

Tips/Tricks:

- Rotation favorites are rotations that you use regularly when scheduling residents and faculty. The list can include your rotations and rotations from other departments. By adding the rotations from the other departments to your “Rotation Favorites” list, they'll automatically appear in your list throughout the software
- Ensure you have all MMCGME rotations (listed in the next two slides) in your rotation favorites

MMCGME Primary Rotations

Training Manual: Page 27

Tips/Tricks:

- These rotations are standard rotations for events that are common to all programs
- Mark these as primary when adding to the block schedule

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	<p>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. University of Minnesota programs do not use this form. They have an internal process.</p> <p>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.</p>



MMCGME Non-Primary Rotations

Training Manual: Page 28

Tips/Tricks:

- These rotations must have a primary rotation that covers the time
- When using these rotations, the primary checkbox must be unchecked
- They can be used for tracking time away for the programs.

Rotation Name
MMCGME-MEDICAL, CAREGIVER OR PARENTAL LEAVE (NON-PRIMARY ROTATION ONLY)
MMCGME-PERSONAL LEAVE (NON PRIMARY ONLY)
MMCGME-PROFESSIONAL CONFERENCE (NON-PRIMARY ROTATION ONLY)
MMCGME-PROFESSIONAL CONFERENCE HALF DAY (NON-PRIMARY ROTATION ONLY)
MMCGME-SICK (NON-PRIMARY ROTATION ONLY)
MMCGME-SICK HALF DAY (NON-PRIMARY ROTATION ONLY)
MMCGME-VACATION (NON-PRIMARY ROTATION ONLY)
MMCGME-VACATION HALF DAY (NON-PRIMARY ROTATION ONLY)
MMCGME-TIME AWAY-DOES NOT EXTEND (NON-PRIMARY ROTATION ONLY)



Optional Tasks to Complete

- **Schedules:** Review assignments; manage assignment definitions
- **Curriculum:** Manage curriculum definitions; pull reports
- **Evaluations:** Review, create, copy forms; configure auto copy
- **Logger:** Manage procedures, roles, locations, and targets
- **Conferences:** Copy conferences; update and distribute surveys
- **Portfolio:** Review forms; schedule reviews; manage journals and activities
- **Home Page:** Request faculty/rotations; upload/edit docs and policies

Assignments

Location in RMS: Schedules > Assignment Definitions
Training Manual: Pages 61-63

Tips/Tricks:

- Archive unused assignments annual
- Look for opportunities to simplify and condense
- Create new assignments
 - Create new assignments on your own or [complete this form](#) for MMCGME to create
 - Follow the naming standard (e.g., Location-Department-Activity)

Assignment Scheduling Setup

[Show Archived](#)

[New](#) Assignment Definitions

[Sharing Assignments with Work Hours](#) | [History Report](#)

	Name/Short Name	Work Type	Training Location	Start Time	Duration (Hours)	Color	Is CC?	Excuse from Conferences?	Pager	Extension	Pager Template
Edit Delete	_Time Away Does Not Extend_Vacation Vacation	Vacation		8:30 AM	10:00	Blue, Dark		☑			
Edit Delete	CCIR-RAD-Research AM CCIR AM	DH-May See New Patients	Center for Clinical Imaging Research (Minneapolis, MN)	9:00 AM	01:00						
Edit Delete	CCIR-RAD-Research PM CCIR PM	DH-May See New Patients	Center for Clinical Imaging Research (Minneapolis, MN)	9:00 AM	01:00						
Edit Delete	HCMC CSC-Radiology HCMC CSC	DH-May See New Patients	Hennepin Healthcare (Minneapolis, MN)	9:00 AM	01:00						
Edit Delete	HCMC-Body P4 HCMC Body	DH-May See New Patients	Hennepin Healthcare (Minneapolis, MN)	9:00 AM	01:00						
Edit Delete	HCMC-Holiday HCMC Holiday	Off Duty		9:00 AM	01:00			☑			

Curriculum

Location in RMS: Schedules > Curriculum
Training Manual: Pages 36-39

Tips/Tricks:

- Curriculum will automatically distribute goals and objectives
- Use the copy and edit method if curriculum definitions are changing for the new academic year
- Review curriculum report for resident compliance
- Helpful Video: RMS > Help > Tutorial Videos > Curriculum [5.1]

Curriculum

Listing Confirmation Report

[New](#) Curriculum Definitions

Include Archived Curricula * Archived

Name	Assigned People	Archive/Activate
Edit Delete Cardiology	Assigned People	Archive
Edit Delete Comm Medicine	Assigned People	Archive
Edit Delete Dermatology	Assigned People	Archive
Edit Delete Dermatology (Revised 2016)	Assigned People	Archive
Edit Delete Fam Med A	Assigned People	Archive
Edit Delete Fam Med B	Assigned People	Archive
Edit Delete Fam Med C	Assigned People	Archive
Edit Delete FPC2	Assigned People	Archive
Edit Delete Geriatrics	Assigned People	Archive
Edit Delete Sports Medicine	Assigned People	Archive

[Export to Excel](#)

E v a l u a t i o n s

Forms Location in RMS: Evaluations > Evaluation Forms


Session Location in RMS: Evaluations > Session Manager

Training Manual: Pages 40-46

Tips/Tricks

- We recommend using the auto matching function as often as possible to help streamline the process
- Setting up notifications help eliminate email burden on the administrative side
- Review your evaluation forms prior to the start of the new academic year
 - If you need to make edits, you can only make small edits to forms in use such as typos
 - If larger edits are need, copy an existing form to a new form
- Auto copy can be helpful to setup if the evaluation sessions remain the same year to year
- Map your evaluations to milestones to help with trainee Milestone Reviews (CCC)
- Helpful Videos: RMS > Help > Tutorial Videos > Evaluations [8.25]

Logger

 **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%)	

Location in RMS: Logger > Lists & Fields (under setup)
Training Manual: Pages 47-48

Tips/Tricks:

- Verify procedure list is current
- Review credentialing targets
- Review your privileges and supervisors
- Helpful Tutorial Videos: RMS > Help > Tutorial Videos > Loggers [10.2, 10.3, & 10.4]

Conferences

Location in RMS: Conferences > Manage Conferences
Training Manual: Pages 49-51

Tips/Tricks:

- Reviewing conferences helps ensure an accurate and continuous calendar of educational conferences
- Helpful Videos: RMS>Help>Tutorial Videos>Conference [11.1, 11.2, & 11.6]

Manage Conferences

Add Edit Delete Copy Roster Attendance Search

Show Conferences: 3/13/2025 to 5/13/2025 Update

Name	Date/Time	Content Category	Speakers	Attn	Surveys
COPY OF Noon Conference	3/13/2025 7:30 AM	Noon Conference			
COPY OF Noon Conference	3/14/2025 7:30 AM	Noon Conference			
Noon Conference	3/14/2025 12:00 PM	Noon Conference			
COPY OF Noon Conference	3/17/2025 7:30 AM	Noon Conference			
COPY OF Noon Conference	3/18/2025 7:30 AM	Noon Conference			
COPY OF Noon Conference	3/19/2025 7:30 AM	Noon Conference			
COPY OF Noon Conference	3/20/2025 7:30 AM	Noon Conference			
COPY OF Noon Conference	3/21/2025 7:30 AM	Noon Conference			
Noon Conference	3/21/2025 12:00 PM	Noon Conference			
COPY OF Noon Conference	3/24/2025 7:30 AM	Noon Conference			
COPY OF Noon Conference	3/25/2025	Noon Conference			

COPY OF Noon Conference [Edit Details](#)

Noon Conference
3/13/2025 7:30 AM to 8:30 AM
University of Minnesota Medical School, Conference Room A
[View Attendance QR Code](#)

Notes -
[View Conferences in this Series](#)

Speakers [Add Speakers](#)

File Attachments [Add Files](#)

Links [Add Links](#)

Attendee Notifications
[Send Manual Notifications](#)
[Add Notifications](#)

[Competencies & Objectives](#)

Surveys
Surveys Not Configured
[Survey Settings](#)

S e m i - A n n u a l R e v i e w s , J o u r n a l s , S c h o l a r l y A c t i v i t y

Location in RMS: Logger > Lists & Fields (under setup)
Training Manual: Pages 52-58

Tips/Tricks:

- Helpful Videos: RMS>Help>Tutorial Videos>Portfolio [13.01 – Scholarly Activities, 13.04 – Create a Review, and 13.07 – Journaling)
- Semi-Annual Reviews: Organizes evidence of learning and that trainees are working towards goals and objectives set by their program
 - Review forms to ensure the correct widgets/data is included
 - Schedule Reviews
- Journals: Is a practice-based learning and improvement too. You can assign journals, designate reviewers, send email notifications and more.
- Scholarly activity: Is designed to capture all relevant information about scholarly activities. These forms can then be tracked by type of activity.

Home Page Resources

Location in RMS: RMS > Home Page
Training Manual: Pages 65-68

Tips/Tricks:

- Home page resource panel helps you organize documents for your learners/faculty
- Recommended Uses:
 - **Forms:** Vacation or Other Requests
 - **Schedules:** Call Schedules
 - **Well-Being:** Institution/Programs initiatives or resources
 - **Reference Materials:** Department manual
 - **Policies:** policies you want to share on the home page
 - **Curriculum:** Documents you want shared outside of the Curriculum module

The screenshot displays a grid of six resource categories, each with a blue icon and a list of associated items:

- Curriculum:** Pain & Opioid Management, Infection Control
- Policies:** Needle Sticks, GME P&P, Duty Hour Restrictions
- Forms:** Central Line Checklist, Vacation Request Form
- Reference Materials:** ACLS Course Dates, ACGME Program Reqs, Report Safety Events, Dosing Calculator
- Schedules:** Add resource
- Well-Being:** Well-Being Assessment

Resources & Additional Training

Below are the training materials for Preparing for a New Academic Year:

- [Training Manual](#)
- [Training Course Outline](#)
- [FAQs](#)
- [Preparing for the New Academic Year Tasks](#)

Additional Training:

- Block Schedules (required)
- Introduction to RMS & GME Payment
- Evaluations
- Conferences
- Onboarding & Checklists
- Curriculum
- Portfolio Review
- Scholarly Activity
- Statements of Activity/Billing
- Logger, Log Books, and Continuity Clinic
- Journals
- Custom Reports
- Work Hours
- Agreements

www.mmcgmeservices.org/training.html



THANK YOU!

Email MMCGMEHelp@umn.edu if you have any questions!

