Yearly Tasks

Here are some tasks you should complete before the beginning of each new academic year:

<table>
<tr><th colspan="2">Administration</th></tr>
<tr><th>Task</th><th>Purpose</th></tr>
<tr><td>Check to make sure the Program Director, Associate Program Director names are correct Program demographics
Check to make sure the program coordinator information is correct
Program>Personnel

Check to make sure Core Faculty and CCC are identified
Program>Personnel>Faculty</td><td>The listed PD and APD get emails and alerts like work hour violations, signatures and confidential comments, and notices for viewing portfolio reviews.

CCC members get access to Milestone Review

Core Faculty are:
Included in accreditation statistics (CLER) like attrition reporting in Key Metrics
Grouped as Core Faculty, Department Faculty, or Outside Faculty in the Evaluation Reports</td></tr>
<tr><td>Create an Academic Year

Software Setup > under Local Setup>Academic Year</td><td>The academic year is an integral piece of the software because it is used to define specific time periods for:
Block schedule intervals
Assignment schedule intervals
Evaluation distribution
Work hour rule checking
Finance applications</td></tr>
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Personnel	
Task	**Purpose**
Import matched residents from ERAS *Personnel >Tools > Import ERAS data*	The ERAS import creates a profile for each new resident and adds valuable information to the profile
Provide MMCGME your NON-ERAS Spreadsheet or have your trainees entered into the data exchange to have them entered into New Innovations	If you don't use ERAS to import new residents, or you only have a few fellows, you can request them to be added them manually
Review your list of trainees and faculty in your program. • Request MMCGME to archive anyone no longer working with the program. *Personnel>Personnel Records*	Get rid of data that is no longer relevant. This helps to speed up your database.
Create Program Specific Onboarding Checklists for your new trainees and Advancement Checklists for those moving to another level in your program *Personnel>Checklists>Onboarding or Advancement*	Checklists can distribute information to new trainees and those advancing to the next year in the program
Check to make sure all required data is up to date in your program *Personnel>Personnel records*	Certain information is be required by your institution for reporting

Schedules-Block

Task	Purpose
Review your Rotation Names • Review Current List of Rotations • Request Edits to Rotation Names • Request unused Rotations are archived • Update Rotation Favorites *Schedules>Setup>Rotation Names*	Make sure new rotations are added and unused ones are archived
Setting up or Revising Rotation Favorites *Schedules>Setup>Rotation Favorites*	Make sure the rotations you need to build the block schedule are easily assessable to you.
Reviewing, Setting up Rotation Requirement • Adding Requirements *Schedules>Setup>Rotation Requirement*	To easily meet ACGME expectations.
Building a Block Schedule on the Web *Schedules>Schedule Rotations*	
Building a Block Schedule Using the Med Scheduler	
Revise & Replace Curriculum *Schedules>Curriculum>Edit*	Share current goals and objectives with trainees
Load and Assign Curriculum *Schedules>Curriculum>New*	Distribute curriculum documents for new rotations to people on the block schedule
Archive Outdated Curriculum Schedules>Curriculum>Archive	Removes access to obsolete curriculum documents

Evaluations

Task	Purpose
Convert any old forms with html code to the new format • Look for any forms with the • This means you have html code in your forms (italics, bold, underlining, etc. • This type of content does not translate well on the mobile app *Evaluations>Evaluation Forms>Actions>Copy to a new form*	Gets old forms updated and available for mobile evaluations.
Update or link tags and core competencies *Evaluations>Evaluation Forms>Edit*	Provides continuity in reporting for Evaluations, Milestone Reviews and Portfolio Reviews
Map Evaluations Questions to Milestone Reviews Evaluations>Setup>Milestones	View evaluation results by competency and subcompetency in Milestone Reviews
Update evaluations, mapping and tagging if you specialty's milestones have changed. Evaluations>Evaluation Forms>Edit	Keep in sync with your specialty and ensure relevant data reaches the CCC Milestone reviews
Update evaluation forms as needed *Evaluations>Evaluations Forms>Edit*	Capture correct data for evaluation reporting
Create and update Program Evaluation Forms for use in Program Evaluations *Evaluations>Program Evaluations Forms*	Ensure program evaluations can be completed and reported.
Archive Evaluation Forms not in use *Evaluations>Evaluation Forms>Actions>Archive*	Prevents selecting obsolete forms when creating sessions
Add manual matches for those sessions that do not match automatically *Evaluations>Session Manager*	Add matches to sessions like Peer Evaluations, Self Evaluations and 360 Evaluations.
Copy sessions into next academic year Evaluations>Session Manager>Select the two pieces of paper icon on the right hand side of the page	Provide continuous distribution of evaluations. • Configure Auto Copy for sessions that use the same interval configuration each year. • Manually copy sessions one at a time for sessions where the intervals will be different next year

Logger

Task	Purpose
Verify that procedures and diagnoses lists are current • Add any new procedures or diagnosis codes *Logger>Setup>Lists and Fields*	Trainees need current, accurate lists to log procedures
Check Privileges targets to keep them current *Logger>Setup>Lists and Fields>Edit*	So you can monitor that trainees are reaching their targets.
Check other options available such as: • Locations • Visit Types • Roles • Patient Types *Logger>Setup>Lists and Fields>Edit*	

Conferences	
Task	**Purpose**
Copy your conferences after your block schedule is finished *Conferences>Manage Conferences>Copy*	Provide an accurate and continuous calendar of educational conferences • Notify attendees and speakers with email alerts • Offer feedback with conference surveys
Update or create new survey forms *Conferences>Survey Forms*	Ensure forms reflect current needs
Check QR Codes *Conferences>Configurations and Defaults>Rooms*	Update room list in Conferences to make sure all rooms are added to Conferences
Check Forms and distribute conference surveys *Conferences>Surveys>Forms & Responses*	Offer method for attendees to provide feedback on conferences

Portfolio	
Task	**Purpose**
Create New Scholarly Activity Forms *Setup > Scholarly Activity > Forms*	Keep forms updated with your current program standards. • Add new Forms or archive those no longer used • Confirm the correct ADS categories are added to the forms
Create Journal Assignments *Portfolio>Manage Journals*	Provide a vehicle for trainees to reflect on educational experiences
Create or Update Portfolio Review Forms *Portfolio>Reviews>Form Templates*	Ensure trainees are reviewed in a timely manner Edit the widgets used to ensure correct data is reported
Schedule Portfolio Reviews *Portfolio>Reviews>Manage Reviews*	Ensure trainees are reviewed in a timely manner

Schedules-Assignments

Task	Purpose
Archive unused assignment definitions *Schedules > Assignment Schedule > Assignment Definitions*	Clean up list of definitions
Update Assignment Definitions to reflect the type of work and time *Schedules > Assignment Schedule > Assignment Definitions*	For example, if your AM Outpatient clinic has moved from 8 AM to 8:30 AM, update with the correct time

Home Page Resources

Task	Purpose
Add and Update home page resources • Check Department Notices to make sure they still apply • Add or remove any documents to the buckets *Administration>Software setup>Tools>Department Manuals*	Put relevant files are in easy reach of program members
Check Department Manuals Documents *Administration>Software setup>Tools>Department Manuals*	Make sure Files are up-to-date
Update Policies *Administration>Program>Policies*	Policies change from year to year. Make sure you have the latest version of each document