

# New Innovations (RMS)

## Preparing for a New Academic Year



Metro MN Council on Graduate Medical Education

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There are a few tasks that have to be completed in the software before the beginning of each new academic year. Use this guide to make sure your New Innovations software is ready. This is also a good time to check some basic configurations to make sure they are in line with new program or hospital policies.

## Administration Module

### Access

Administrators with L5 privileges in one program:

1. Go to Administration > Program
2. Click Personnel in the left panel
3. Follow the steps below to add personnel

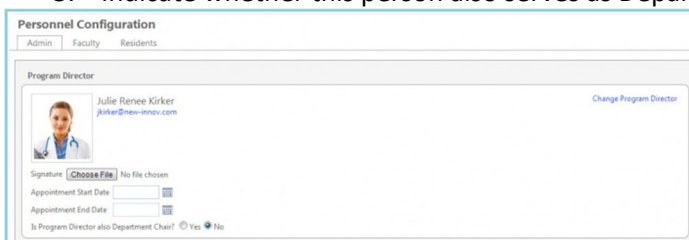
### Designating Program Personnel

#### *Administration>Program>Personnel*

- Setting a program director, assistant program director, and administrators helps the right people get the right information from New Innovations.
- 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 pages.
- 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

### Designate Program Director

1. Click Designate a Program Director
2. Select the name from the drop down list
3. Add a file with the PD's signature
4. Add Appointment Start and End date
5. Indicate whether this person also serves as Department Chair




The screenshot shows the 'Personnel Configuration' window with tabs for 'Admin', 'Faculty', and 'Residents'. The 'Program Director' section is active, displaying a profile for Julie Renee Kirker with her email 'junker@new-innov.com' and a 'Change Program Director' link. Below the profile, there is a 'Signature' field with a 'Choose File' button and the text 'No file chosen'. There are also 'Appointment Start Date' and 'Appointment End Date' fields with calendar icons. At the bottom, there is a radio button question: 'Is Program Director also Department Chair?' with 'Yes' and 'No' options.

## Designate Associate Program Director

1. Click Designate an Associate Program Director
2. Select the name from the dropdown list
3. Add another Associate PD by clicking the Designate an Associate Program Director link and selecting the next person

Associate Program Directors

Designate an Associate Program Director


 Nancy Lee Durbin  
1234 Miller Rd  
Akron, Ohio 44634  
ndurbin@med.com  
Mobile: (330) 309-7224  
Work: (330) 499-3434  
Pager: (330) 856-7777

[Change Associate Program Director](#)

## Designate Chief/Chair

1. Click Designate a Chief/Chair
2. Select the name from the drop down list
3. Click Browse to add a file with the person's signature
4. Add Appointment Start and End dates

Chief/Chair

 Jeff James Buchanan

[Change Chief/Chair](#)

Signature  No file chosen

Appointment Start Date


Appointment End Date

## Designate Program Coordinator

- Click Designate a Coordinator
- Select the name from the drop down list
- Click Browse to add a file with the person's signature
- Add Appointment Start and End dates
- Add as many coordinators as needed
- Click **Set as Primary Coordinator** to designate the person to receive emails

Coordinator


Designate a Coordinator

 Maya Fenton  
mfenton@newlinov.com  
Work: (555) 955-6767

Signature

Appointment Start Date:

Appointment End Date:

 Catherine Calloway  
DemosA@Newlinov.com  
Work: (555) 555-5555

Signature

Appointment Start Date:

Appointment End Date:

## Designate Faculty, Core Faculty, CCC

[Administration](#)>[Program](#)>[Personnel](#)>[Faculty](#)

On the Faculty tab, designate the faculty members who are 'core' faculty and which faculty members are part of the Clinical Competency Committee.

- Giving a person the CCC designation grants them permission to access the Milestone assessment pages.
  - Giving a person the Core Faculty designation includes them in accreditation statistics (CLER)
  - **If you are giving a faculty member from an outside program an appointment in your program to include them on your PEC, do not designate them as CCC or Core Faculty. Doing so will skew your accreditation statistics.**
1. Click the Add Faculty button
  2. The department drop down list defaults to your department, but you may select any department
  3. Select the name from the drop down list
    - a) Add the date of appointment (hire date)
    - b) Check the boxes to indicate if this person is core faculty or serves on the Clinical Competency Committee
  4. Click Add Faculty
    - a) You can multi-select from the faculty list but should not add the appointment dates, core faculty or CCC option unless the information is the same for all selected people.
  5. Click Save
  6. To remove a Core Faculty or CCC designation, click the edit icon, uncheck the box and Save

The screenshot shows a web interface titled "Personnel Configuration" with three tabs: "Admin", "Faculty", and "Trainees". The "Faculty" tab is selected. Below the tabs is a grid of 12 faculty member profiles, arranged in 4 rows and 3 columns. Each profile includes the name, appointment date, and two checkboxes: "Core" and "CCC". An edit icon (pencil) is located to the right of each profile.

| Name              | Appointed | Core                                | CCC                                 | Edit |
|-------------------|-----------|-------------------------------------|-------------------------------------|------|
| Andrews, Florence | 7/15/1997 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |      |
| Arden, Fred       | 7/1/2010  | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |      |
| Atkins, Chet *    | 1/1/2010  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |      |
| Bach, Ann         | 9/1/2009  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |      |
| Barata, Dawn      | 9/1/2009  | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |      |
| Bireau, Ande      | 7/1/2010  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |      |
| Clarkson, Holly   | 9/1/2009  | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |      |
| Dalvario, Angela  | 1/1/2010  | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |      |
| Danaher, William  | 9/1/2009  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |      |
| Evans, Karrie     | 7/1/2010  | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |      |
| Grayson, Bernie   | 9/1/2009  | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |      |
| Harding, Jamie    | 9/1/2009  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |      |

The CCC and Core Faculty designation can be changed at any time by clicking on the edit icon (pencil). Just turn on or off the CCC or Core button and then save your changes.

## Create an Academic Year

For more information about creating a new academic year go to [Help>Tutorial Videos>Program Administration \[2.07\] Admin-Academic Year>Create](#)

### Why is this important?

The academic year is an integral piece of the software because it is used to define specific time periods for:

- Block schedule intervals
  - Assignment (daily and call) schedule intervals
  - Evaluation distribution schedules
  - Work hour rule checking
  - Finance applications
- 
1. Go to **Administration > Software Setup >** under Local Setup: **Academic Years > Academic Years** tab
  2. Click **New**
  3. Enter new academic year name in the text box
  4. Enter the start and end dates of the Academic Year
  5. Choices for Primary and Hidden
    - a. Primary years appear first in dropdown lists and are used in Duty Hour signoff
    - b. Hidden years do not appear in lists except in the block schedule for administrators
  6. Select the number of intervals for the year
  7. Check 'Include dates' to make the interval dates appear in the interval label
  8. Edit the new interval names and start/end dates as necessary. If you change the dates, the interval name will update accordingly.
  9. Click Save

### Notes

- Deleting an academic year does not delete the Block Schedule or Evaluations. You cannot VIEW them but they are still there. Just recreate the academic year.
- When you create academic year, always make the dates consecutive with no gaps between the last day of the current year and the first day of the next year. Doing so can create problems viewing evaluation results for the correct date range and in the financial applications.
- Check the dates to make sure they are correct for your program. For example, if your rotations always start on Mondays, check that each interval starts on a Monday.



Name

Date range  to   Primary  Hidden ✔

Intervals  Sample Labels  Include dates

|                                        |                                                                                   |           |
|----------------------------------------|-----------------------------------------------------------------------------------|-----------|
| <input type="text" value="July"/>      | <input type="text" value="7/1/2023"/> to <input type="text" value="7/31/2023"/>   | July      |
| <input type="text" value="August"/>    | <input type="text" value="8/1/2023"/> to <input type="text" value="8/31/2023"/>   | August    |
| <input type="text" value="September"/> | <input type="text" value="9/1/2023"/> to <input type="text" value="9/30/2023"/>   | September |
| <input type="text" value="October"/>   | <input type="text" value="10/1/2023"/> to <input type="text" value="10/31/2023"/> | October   |
| <input type="text" value="November"/>  | <input type="text" value="11/1/2023"/> to <input type="text" value="11/30/2023"/> | November  |
| <input type="text" value="December"/>  | <input type="text" value="12/1/2023"/> to <input type="text" value="12/31/2023"/> | December  |
| <input type="text" value="January"/>   | <input type="text" value="1/1/2024"/> to <input type="text" value="1/31/2024"/>   | January   |
| <input type="text" value="February"/>  | <input type="text" value="2/1/2024"/> to <input type="text" value="2/29/2024"/>   | February  |
| <input type="text" value="March"/>     | <input type="text" value="3/1/2024"/> to <input type="text" value="3/31/2024"/>   | March     |
| <input type="text" value="April"/>     | <input type="text" value="4/1/2024"/> to <input type="text" value="4/30/2024"/>   | April     |
| <input type="text" value="May"/>       | <input type="text" value="5/1/2024"/> to <input type="text" value="5/31/2024"/>   | May       |
| <input type="text" value="June"/>      | <input type="text" value="6/1/2024"/> to <input type="text" value="6/30/2024"/>   | June      |

## Create a Recurring Academic Year

**Administration > Software Setup > Local Setup > Academic Years>Recurring**

### Why is this important?

Having the academic year automatically created ensures that functions such as work hour rule checking and evaluation distribution will continue from year to year without interruption.

Recurring Year Settings Delete

**Start Date**

Every year on July 1

First Sunday of January

**Intervals**

Calendar months

Semi-annual

Quarterly

13 intervals that are 4 weeks long

**Additional Options**

Create new year on May 1  Primary Academic Year

Email the following recipients when the Academic Year is created

demomail@new-innov.com

separate multiple addresses with semi-colons

Recurring academic years are named using the start date and end date years.

Add to academic year name

1. Go to **Administration > Software Setup > Local Setup > Academic Years > Recurring tab**
2. Click **New**
3. Select the start date of the recurring pattern for your academic year
4. Select how many intervals to use
5. Select when the system should create the new year
6. Your email address is entered for you so you can receive an email when the New Year is created. Enter other people's addresses if they should be notified too.
7. Each time a new year is created it is named using the start and end date year. If you want something additional added to the year, enter it in the text box. An example would be 'PRG-1'. When the New Year is created it will display as '2024-2025 PRG-1'.
8. Click **Save**

## Multiple academic years

When different training years start on different dates, you can create an Academic Year to accommodate each one. Doing so makes scheduling on the web and in MedScheduler easier because you don't have to adjust dates as you schedule.

When you schedule the interns, select the intern Academic Year so you're using the correct intervals for scheduling them. Select the PRG year when you schedule the 2nd and 3rd year residents.

1. Follow the steps for creating an Academic Year above
2. For step 3, name the academic year for the training year it represents. For example, 'Intern 2024-2025 and PRG 2&3 2024-2025 for the second and third years.
3. For steps 6 and 7, enter the appropriate number of intervals and edit the dates to reflect the correct interval dates
4. Go to Administration > Software Setup
5. Under Local Setup, click Academic Year
6. Select the academic year
7. Make any necessary edits to the dates or interval names:

Academic Year Start and End Dates - In the 'Date Range' fields, enter the correct dates. The dates within the intervals will automatically update for you.

- Primary - Check the box to make this academic year 'Primary,' meaning it will appear first in the drop-down lists. Only one academic year can be marked as 'Primary.'
- Hidden - Check the box to make this academic year hidden to residents and faculty. Uncheck the box to allow residents and faculty to see their block schedules, etc., for this academic year.
- Intervals - Change the number of intervals. (Note: The number of intervals cannot be changed if you're using Duty Hour Signoff.)
- Labels - Check the box to include date labels for intervals
- Interval Names - Edit the interval names
- Interval Dates - Edit the start date of an interval. The end date of the previous interval will automatically be adjusted.
- Click Save

### Notes

- Once an academic year is created, there is no way to adjust the number of intervals. Just delete the academic year and start over.
- Editing an academic year does not change any of the data that was entered using that year, such as block schedules. You will need to edit schedules independently.
- If you include the dates of the intervals in the labels, they will be displayed in the block schedule interval headers. If the dates are wrong, go back to the academic years and change them. They cannot be edited in the schedule.

## Copy academic years to other departments

Level 5 and Level 6 users can copy an academic year to other departments where they have privileges, and also to departments where they have 'implied' privileges. Implied privileges are given to coordinators for any department without a designated coordinator.

1. Go to Administration > Software Setup > Tools > Copy Academic Years
2. In the left box, select the department that has the academic year that you'd like to copy
3. Click Include Academic Years from selected Departments
4. The academic years will appear at the bottom of the page. Check the box for the year(s) you want to copy.
5. In the box to the right, select the department(s) that you want to copy the academic year to
6. Click Copy selected Academic Years to selected Departments

## Personnel Module

Each resident and fellow must have a Personnel record so they can complete evaluations, log procedures, log work hours and more. We recommend that each person has only one record within your database. Contact MMCGME Services to add new residents and fellows to RMS using one of the two following processes (some programs follow both processes). **New resident/fellow information must be received by March 29;** however, please follow your GME office set deadlines.

### Add New Trainees

Add learners either via:

- **ERAS import**  
New Innovations works with ERAS to provide a direct import of info via API or "will start" file upload. Good for adding multiple incoming learners.
- **Add New Person**  
One-off addition of a trainee within Personnel. MMCGME does this.

### ERAS Import

For more information about creating a new academic year go to [Help>Tutorial Videos> Personnel \[3.06\] Personnel-ERAS Import](#)

### Why is this important?

New Innovations works with ERAS to provide the data import, but we cannot answer questions about how the ERAS site is structured or maintained.

If you have multiple tracks in your program, such as a prelim or categorical, it is best to do two separate imports: one for people in the prelim/categorical track and one for all others.

1. **Don't import prior to noon ET on Match Day**
2. Go to **Personnel > Under Tools: Import ERAS Data**
3. Choose the appropriate program from the dropdown box. The accreditation code must match the program or the button to make the connection to ERAS will not work.
4. The status type is entered for you based on the program status mapping
5. The start date is entered for you based on the advancement section in the program
6. The Post Graduate Year defaults to 1. Leave it at 1 if most people you're importing have that PGY
7. Select the employer from the dropdown list
8. Select a Compensation Status (only applicable to Hennepin Healthcare programs)
9. Enter the start/hire date (this should be the same date as your start date)
10. At this point, choose the type of import to perform, **Connect to API** or **Upload Data file**

NOTE: if any of the prepopulated fields are incorrect reach out to MMCGME services to correct this before importing.

**ERAS API**

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

Accrediting Body    *ACGME*  
Accreditation #    *1839487499*

**Upload ERAS file**

Choose the file exported from the AAMC (PDWS).

OR

## Connect to API:

New Innovations works with ERAS to provide a direct import of information from them to our software.

- Your DIO or DME needs to approve this transfer of data once, then year after year you import ERAS data via API  
*You can see whether DIO or DME authorization has been recorded by checking in the Program Director Work Station (PDWS)*
- The Accrediting Body and Accreditation # should be populated based on the program you selected when you set import values
- Click **Connect to API**
- Click **Continue**
- The names of the people you selected from ERAS appear on this page.
- Reconcile any discrepancies
- Click **Continue**
- However, the Education record listing the Medical School will not be created for that person. To match the Medical Schools during the process:
  - Select the appropriate medical school from the dropdown lists
  - Click on Match Medical Schools at the bottom of the page
  - Check the box for all those people to import. Check for possible duplicate at the bottom of this screen. See notes below.
  - Click Continue to import the data to the Personnel module
- **First/Last Name Requirement**

If both names are not present, this error message appears. Enter the names and try again.

**Import ERAS Data**

---

The person with the last name of ErasTester needs a first name.

## Matching Medical Schools (if necessary)

Medical School names must match exactly. If ERAS Medical Schools do not match exactly to a medical school in the RMS medical school list, the person will still be imported and a Training Record for their Residency/Fellowship will be created. However, the Education record listing the Medical School will not be created for that person. To match the Medical Schools during the process:

1. Select the appropriate medical school from the dropdown lists
2. Click on **Match Medical Schools** at the bottom of the page
3. Check the box for all those people to import. Check for possible duplicate at the bottom of this screen. See notes below.
4. Click **Continue** to import the data to the Personnel module

## Manually Add Trainees to RMS

**If the program does not use ERAS, new residents and fellows must be manually added to RMS detailed below:**

1. Enter the information from the manual spreadsheet that was provided to you and return the completed form via a secure email server.
2. MMCGME Services manually enters the information into New Innovations to create the personnel data record.
3. MMCGME Services will email the coordinator or program representative to inform them that their users have been entered into New Innovations.
4. Programs are encouraged to begin gathering required documentation and building block schedules in RMS for the residents/fellows.
5. MMCGME Services will follow up with the programs if there is missing IRIS information.

### **Process for University of Minnesota programs:**

For UMN Programs, the trainees will enter their information into the Data Exchange. The manual spreadsheet cannot be accepted.

## Check Faculty Records

### Why is this important?

Keep faculty members' records up to date. Add new faculty and archive those who have left or retired. Reduce size and efficiency of selection lists. You can also find the links to these forms on RMS Home Page.

- To add new faculty or to request faculty to be archived, complete the form on the [Add a User/Faculty Request](#)

## Checklists

Checklists can contain steps for recipients to view links to training videos or have them download and upload documents.

### **For more information about checklist please go to [Help>Tutorial Videos>Personnel \[3.09\] Personnel-Create Checklists](#)**

### Why is this important?

Onboarding checklist can be distributed to people with the status of 'Incoming Resident', 'Incoming Fellow and trainees that are changing programs.' These are the statuses given to people before they are considered a first year in either a residency or fellowship. If you wait until after the residents or fellows start in their program, the onboarding checklists will not be available for you to send.

Onboarding checklists help you collect information and documents for new hires, such as tax forms, transcripts, licenses, benefits, etc.

## **Create Onboarding/Advancement/Rotation Checklists**

All three types of checklists are constructed the same way.

1. Go to **Personnel > Checklists > Select *Onboarding, Advancement or Rotation***
2. Click **New**
3. Enter a Name and Instructions
4. Check the 'Checklist for Administrator Only' box if this checklist will only be viewed and used by administrators. If this box is checked, the residents/fellows will not see this checklist.
5. Check the 'Required for Advancement' box if residents must complete this checklist by the due date in order to advance to the next level of their training (status and PGY level). This is not recommended.

*You can set due dates when distributing checklists.*

**Caution:** If you use this feature and a resident or fellow does not advance because of it, their status on the Block Schedule will not advance and the old status will be displayed. This means:

- When evaluations are created, the old status will be used and the resident or fellow will fall within the peer group of the old status
- When conference rosters are built, the old status will be used, not the new status



6. If you are a Level 6 you have these options:

#### Level 6 Options

Allow level 5 administrators to:

- Complete steps
  - Complete steps that have additional reviewers
- Modify step requirements
- Delete this checklist

- Click **Level 6 options**
- Limit what an L5 administrator can do with a checklist. Check which options you'd like to limit. Even with the boxes *unchecked*, L5 administrators can still view uploaded files, edit text boxes and return steps to recipients.

7. Click **Save Checklist Settings**

When you create your checklist, you have the option to create a brand new step or to add an existing step.

### Add a new step

1. Click **Add Step**
2. Add a step name
3. Enter instructions for the recipient in Recipient
4. Enter instructions that only administrators can see in Administrator
5. Add a date that the step is due to be completed  
Step due dates:
  - Are only linked to the single step instance on the current checklist
  - Do not copy when you copy a checklist
  - Cannot be changed for individual recipients
  - Unlike *checklist* due dates, are only visual prompts for checklist recipients. Step due dates have no other functions besides appearing on the step as a timing prompt to the recipient.
6. Click **Add Step**. A new menu will appear
7. Optional: 'Recipient can mark as complete'. This option allows the recipient to mark steps complete on the checklist. If you want an administrator to review and mark the step complete instead of the recipient, **uncheck** the box
8. Check '**Step for Administrator use only**' if only the administrator will see this step, but the recipient will not

The screenshot shows a web form titled "Add Step". It contains the following elements:

- Name:** A text input field with a character count of "Remaining Characters: 150".
- Instructions:** A section containing:
  - Recipient:** A text input field with the placeholder text "Please complete this step" and a character count of "Remaining Characters: 975".
  - Administrator:** A text input field with a character count of "Remaining Characters: 1,000".
  - Due Date:** A field with a calendar icon and the instruction "Designate an instructional due date to prioritize steps".
- Buttons:** "Add Step" and "Cancel" buttons at the bottom left.

## Add a Hyperlink

Use this feature to give recipients access to online materials.

1. Click **Hyperlink**
2. Enter a name for the link. This is the text that the recipient will click on to view the information.
3. Enter the URL (web address)
4. Click **Save Link**

## Information Exchange

Use this feature to:

- Provide files for recipients
- Request a file from recipients. Allow them to upload multiple files (Limit of 5). Files can be a Microsoft Word document or in PDF format. Limit 12 MB each.
- Provide a text box for the recipient to enter information
- Supply recipients with a form to complete
- Move uploaded files to a selected folder in Files & Notes
- Confirm receipt of Sponsor and Program policies
- Distribute Contracts. **Note:** The Future Contracts feature must be set up for Contracts to appear in the drop-down list. Contracts can be sent through Onboarding and Advancement Checklists.

1. Select a Type:
  - **Provide a File** if you only want the recipient to download and view a document that you supply
  - **File Upload**, to require the recipients to upload a file.
    - ▶ Check the appropriate boxes so that recipients can attach a file, view a file, or upload multiple files
    - ▶ Optionally specify a folder in Files & Notes where the document will be moved upon step completion. If no folder is specified, all documents will be moved to the Onboarding folder. Click Upload File to attach a document for the recipient to view
    - ▶ Recipients can upload up to five documents. After that, they'll get a popup letting them know they've reached the limit. Files can be uploaded at any time until the step is marked complete.
  - **Text Box**, to have the recipient enter information in a field. Limit of 25 characters.

- ▶ You can also provide a document to the recipient in this step by clicking Upload File. When this option is used, the text is not exportable.
  - ▶ When text is added to the field, it cannot be exported to another application or to another module.
  - ▶ Suggestion: if you want to collect data to be added to Personnel, such as license or certification information, use the Form option. Add the correct fields to the Form and add the form to the Checklist.
- **Form and the form name**, if you want to have the recipient complete a form with Personnel information. The form is created using fields linked directly to the recipient's personnel file so that when they enter information, it can be loaded automatically and sent to the corresponding personnel field. A form must be created before it can be attached to a checklist.
  - **Policy** to have the recipient confirm receiving your institution's policies. Check Sponsor Policies if you want the sponsor policies distributed to the resident. Check Program Policies if you want the program policies distributed to the resident. Policies can be uploaded into the software in the Sponsor and Program pages before or after this step is added to a checklist.
  - **Contract** to distribute contracts electronically through checklists. The word 'Contracts' will only appear in the drop-down list if the Future Contracts setup has been configured.
    - ▶ Select Contract Type
    - ▶ Select Contract Template

The screenshot shows a window titled "Information Exchange". It contains three dropdown menus: "Type" set to "Contract", "Contract Type" set to "Resident Contract", and "Contract Template" set to "Checklist Contract Template". A blue tooltip is visible over the "Contract Type" dropdown, stating "Creates mail merged future contracts on distribution for recipient signature".

- **Immunizations** to allow recipients to enter information about required immunizations. Administrators can review and confirm receipt once distributed and completed. Immunizations data is automatically stored in personnel records upon either the learner or administrator submitting the information. Level 5 privileges are subject to settings applied in Customized Security.

## Conditional Recipients

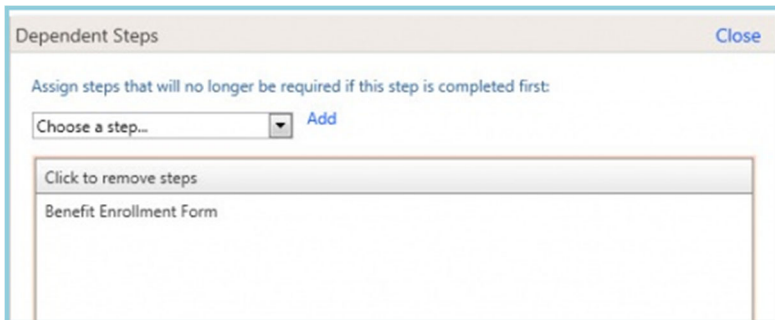
Setting up Conditional Recipients is optional and allows you to assign steps to a subgroup of recipients who meet select criteria. An example is foreign medical students who require a Visa. You can designate only those recipients who require a Visa to see the Visa step. Domestic graduates would not.

1. Click on the specific step
2. Click on **Conditional Recipient**
3. Select the condition for distributing this step
4. Click **OK**

## Dependent Steps

You can create relationships between steps so that if one is completed, its dependent steps are no longer required. For example, you may use this feature if you are asking your residents if they plan to enroll in your benefits program. If they waive their benefits, then they wouldn't be required to complete benefit enrollment forms. In this case, you might have two steps: One to complete a waiver and one to enroll in the benefits program. If they opt to complete the waiver, they will no longer be required to complete the enrollment form.

1. Click on the specific step
2. Click on the **Dependent Steps**
3. Choose a step - (Note: Steps must be created prior to using this feature)
4. Click **Add**



Dependent Steps Close

Assign steps that will no longer be required if this step is completed first:

Choose a step... Add

| Click to remove steps   |
|-------------------------|
| Benefit Enrollment Form |

## Additional Reviewers

You can set up a step so that people outside of your program can approve or complete a step. An example might be when tax information should be sent to Human Resources for processing. Create the person's profile in Personnel and give the HR person Level 1 privileges in Personnel. This allows the HR person to appear in the list of reviewers. Then go to your checklist:

1. Create the step
2. Attach document or allow the recipient to upload a document
3. Go to Additional Reviewers section and select person's name from the list

Information Exchange ▲

Type: File Upload ▼

Require a file upload for completion

Recipient can

- upload files
- view uploaded files

Specify the personnel folder where files will be moved upon completion

Onboarding ▼

---

Provide a file to the recipient

Attach File

---

Additional Reviewers ▲

Selected reviewers (click to remove)

Valarie Todd

[Add reviewers](#) | [Save as a review group](#) | [Use existing review group](#)

4. Click **Add Existing Step**
5. Choose a Step
6. Click **Add**

New Checklist Checklist settings

[Add Step](#) [Add Existing Step](#) [Delete Step](#)

Select an existing step to add to list ([View all departments](#))

Choose a step... ▼

## **Personnel Record Management**

### **Why is this important?**

Review new resident demographic information and update any necessary fields. It is very important that the necessary RMS Personnel Record fields are accurately entered and updated as hospitals use this as a resource to obtain information on the residents and fellows rotating to their institution.

## **Required Data & Documentation Standard Background**

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.

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. This standard is in effect for trainees beginning July 1, 2019 and after.

Should you need assistance in advising your training sites how to access information about your trainees in RMS, please reach out to [mmcgmehelp@umn.edu](mailto:mmcgmehelp@umn.edu).

## **Required Data & Documentation Standard**

### **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:

**Currently MMCGME Services inputs and maintains and will continue to input and maintain the following data:**

- Data: Department
- Data: ECFMG Certification Date (if applicable)
- Data: ECFMG Number (if applicable)
- Data: Email: Institutional email address
- Data: Initial Residency Program
- Data: Medical/Dental School Graduation Date
- Data: Medical/Dental School Name
- Data: Name: First
- Data: Name: Last
- Data: Name: Middle
- Data: Program/Start End Dates
- Data: Social Security Number

**Required Data to be input by Program into RMS:**

- Data: Address - Home
- Data: Address - Permanent (if different than Home Address)
- Data: Citizenship Country
- Data: Credential Degree (DO, DPM, MBBS, MB BCh, MBChB, MD, PhD, Other)
- Data: Date of birth (month/day/year)
- Data: DEA Number (if applicable)
- Data: Email: personal email address
- Data: Emergency Contact Information
- Data: Gender
- Data: MN License Number (If applicable)
- Data: MN License Expiration Date (If applicable)
- Data: MN Permit Number (if applicable)
- Data: MN Permit Expiration Date (if applicable)
- Data: NPI Number\*
- Data: Pager Number\*
- Data: PECOS\*
- Data: Phone - Cell

- Data: Phone - Home
- Data: Visa Number (if applicable)
- Data: Visa sponsorship status (if required)
- Data: Visa start and end dates

### **Required Documentation in RMS**

- Documentation: Background Study Clearance Form (NET Study 2.0)
- Documentation: Contract/Agreement (between trainee and institution)
- Documentation: ECFMG Certificate (if applicable)
- Documentation: Liability/Workers Compensation Insurance Coverage Verification\*
- Documentation: License (if applicable)
- Documentation: Medical School Diploma
- Documentation: PECOS approval letter, if enrolling for the first time\*
- Documentation: Permit (if applicable)
- Documentation: Photo
- Documentation: Prior GME Training Completion Certificates
- Documentation: Prior Training History
- Documentation: PLA

### **Preferred Data in RMS**

- Data: Race/Ethnicity

\*applicable only to GME trainees

### **Procedures:**

Programs are able to define their own process steps regarding input of the above information. Information should be entered into RMS Demographic Data prior to trainee rotation start date. MMCGME Services is available to assist with set up of checklists to facilitate ease of collecting the above information or additional on-site training as necessary.

MMCGME Services will annually monitor data and documents for non-compliance. Non-compliance with the Required Data Standard may result in trainees not being allowed to train at sites.



## Block Scheduling

For more information about block schedule go to [Help>Tutorial Videos>Block Schedule \[4.0\] Block Schedule-Block Schedule Basics](#)

### Review or Request Edits to Rotation Names

#### **Why is this important?**

The next step in preparing for the new academic year is to look at the existing rotations in RMS and compare them with the rotations identified in the annual rotation schedule for your program. Be sure that all your necessary rotations exist in RMS.

When reviewing rotations, **please be sure that any rotations not occurring at your institution are identified with a four-letter abbreviation code at the end of the rotation name.** This will ensure that the other institutions will be able to obtain the necessary information about the rotating residents.

### View Existing Rotations

1. Click **Schedules**.
2. In the top box labeled Block Scheduling, under the heading Setup, click **Rotation Names**.
3. Make a note of any rotations that do not currently exist that will be required to build the block schedules for your program(s).

### Add, Update, Remove or Archive Rotations

If you need a new rotation added, an existing rotation updated, or rotations no longer used, complete the “**Rotation Request Form**.” The Rotation Request Form is located on the MMCGME Services website [Rotation Request Form](#).

Upon receipt of the Rotation Request Form, MMCGME Services will review the request to determine if the information is complete and if the request meets the requirements of the institutions involved. These institutions are the **Sponsoring Institution (Program)** and the **Receiving Institution (Training Site for the Rotation)**.

If the Sponsoring and Receiving Institutions are different, formal agreements – “**Program Letter of Agreement (PLA)**” – must be in place before sending a resident/fellow to that training site. The program is responsible for initiating these contracts with the Receiving Institutions.

MMCGME Services will process the request.

**NOTES:**

Primary Rotations - When rotation schedules are created, you can indicate if the rotation is 'primary'. This flags the rotation as the one that should be used for:

- Duty Hour rule checking
- Rotation Requirement calculations
- Financial reports

Most rotations that residents are scheduled for should be marked primary. Non-primary rotations are used as placeholders on the schedule for things like LOA or Research.

Night Float - It indicates that any logs from the night float rotation should not be checked against the call rules. Also check it if you want to check the rules using the 2003 standards.

Requires Curriculum - Check this box if this rotation should have a goals and objectives document uploaded in the Curriculum module. When this box is checked, the Program Dashboard displays the statistics for curriculum documents available to residents.

Contact Information - You can include details for rotations, such as a contact person, that will be available to anyone scheduled on the rotation.

Add Pagers to a Rotation Definition - Pagers that are given to trainees for use during a service can be added to the information detail for a rotation. The rotation pager number can also be added to custom schedule views.

Rotation Ownership - If your faculty member precepts a rotation, then your department owns it. For example, your faculty members in the Geriatrics department precepts the Geriatrics rotation; therefore, Family Medicine shouldn't have a Geriatrics rotation.

**IMPORTANT:** When you request an update to a rotation name the updated name replaces the old name. This means that all existing data, past, current and future, in the following areas is updated

- Evaluation reports
- Schedules
- Conference rosters
- Duty Hours

Since changing the rotation name is retroactive and updates historical data, we suggest creating a NEW rotation name and archiving the old one instead of changing the original.

## 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.

## MMCGME Rotations

MMCGME Services has created standard rotations for events that are common to all residency and fellowship programs.

| MMCGME Rotation                 | Definition                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|---------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>MMCGME-LATE START</b>        | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>MMCGME-OFF CYCLE GRAD</b>    | 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.                                                                                                                                                                                                                            |
| <b>MMCGME-RESIGNED</b>          | 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.                                                                                                                                                                                                                                                                                                                                                      |
| <b>MMCGME-TIME AWAY EXTENDS</b> | 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.<br><br><b>NOTE:</b> Time Away – Does NOT Extend Short/Long does not need to appear on the block schedule. It would only appear on the assignment schedule. |

## MMCGME Non-Primary Rotations

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.

| <b>Rotation Name</b>                                                    |
|-------------------------------------------------------------------------|
| 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)            |

# Setting Rotation Favorites

## Schedules>Setup>Rotation Favorites

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.

### Add to list

1. Go to **Schedules** > Under Setup: **Rotation Favorites**
2. The rotations in your department may already be in the list at the bottom of the page The rotations in your department may already be in the list at the bottom of the page

### Rotation Favorites

[All](#) | [None](#) | [Invert](#) | Departments

[All](#) | [None](#) | [Invert](#) | Rotations

1 Selected:

[Adjust Rotations List](#) [Add Selected Rotations to Favorites](#)

[Delete All](#)

| Delete                   | Rotation Name                               | Abbreviation |
|--------------------------|---------------------------------------------|--------------|
| <input type="checkbox"/> | Rot Def 1 (Aaron's School of Medicine)      |              |
| <input type="checkbox"/> | AD-IM-AMB (AD Internal Medicine)            |              |
| <input type="checkbox"/> | AD-IM-WARDS A (AD Internal Medicine)        |              |
| <input type="checkbox"/> | DM-IM-FACONE-PVT OFC (AD Internal Medicine) |              |

3. Select departments from the list
4. Click **Adjust Rotations List**  
*Selected departments' rotations appear in the box to the right*
5. Check mark the rotation(s) from the box you want to add to your Favorites list
6. Click **Add Selected Rotations** to Favorites

## Remove from list

1. Go to **Schedules** > Under Setup: **Rotation Favorites**
2. In the Favorites list at the bottom, check the rotation to delete

| Delete                              | Rotation Name                          |
|-------------------------------------|----------------------------------------|
| <input checked="" type="checkbox"/> | Rot Def 1 (Aaron's School of Medicine) |
| <input type="checkbox"/>            | AD-IM-AMB (AD Internal Medicine)       |
| <input type="checkbox"/>            | AD-IM-WARDS A (AD Internal Medicine)   |

3. Click **Delete** at the top or bottom of the list
4. You can also click the **Delete All** link to delete all of the rotations from the favorites list

## Where you see favorites

The Rotation Favorites list appears in these modules as the default rotation list:

- Block Scheduling when building the schedule
- MedScheduler when creating block schedules
- Evaluation Sessions when setting up to make automatic matches
- Work Hours when editing logs
- Conferences when creating default roster configuration
- Milestones when creating direct milestones by rotation
- Assignment Schedules when applying templates
- Curriculum when linking curriculum documents to rotations

## Reviewing, Setting up Rotation Requirements

Set the number of weeks the residents are required to be on specific rotations according to your Common Program Requirements. This information appears in Portfolio Reviews, on the Program Dashboard in Administration, and in the Medscheduler for the Block Schedule Requirements feature. Specialized features provide for breaking down the number of weeks spent on the rotation by status. For instance, a first year resident may be required to work 4 weeks on a rotation while an upper level trainee must work 6 weeks. If you use this feature, enter the higher number in the total number of weeks spent on the rotation field.

## Add Requirements

1. Go to Schedules > Setup > Rotation Requirements
2. Select the program from the dropdown list. If you are privileged in only one department, you won't have a list.
3. Map the statuses by program year that will have rotation requirements. Click Define Statuses per Program Year. Select the statuses you use for each year and click Save
4. Click the Add Rotation Requirement button
5. Enter the name of the requirement such as 'PGY 1 Rotations' or 'SICU'
6. You can add a Short Name that will be displayed in the Medscheduler
7. Enter the total number of weeks that the resident needs to spend on this rotation. This number cannot be larger than the overall total weeks. See step 10.

8. Select the rotation from the Required Rotations list
9. Choose which year the requirement applies to
10. You can further define the number of weeks by year.
11. We have also provided an option to include all rotations in one Requirement. Check the box below the rotation list to 'Include all rotations'.
12. Click Add Rotation Requirement

### Creating a block schedule

The Block Schedule displays information about residents rotating to different services throughout the year and who will precept the rotation. Information such as status, post graduate year and program come from the Personnel module.

Rotation names and academic year intervals used on the schedule come from Administration.

### Why is this important?

Besides needing to know what rotations your trainees are serving, there are other modules in the software that use the Block Schedule for information:

- Evaluations - The Evaluation module uses the block schedule to create evaluations between people who are working together on the same rotation
- Duty Hours - ACGME Duty hour rules are calculated based on the rotation schedule
- Conferences - Conference Rosters are created using the status and rotation from the block schedule
- Assignment Schedules - Residents must first be on the block schedule in order to schedule their daily tasks on the Assignment Schedule
- Finance/IRIS – Calculations for IRIS reimbursement are based on the block schedule
- Curriculum – Distribute each rotation’s Goals and Objectives to residents before they begin their rotation
- Rotation Requirements - Each program can set up their own rotation requirements to track the number of weeks a resident or fellow spends on rotations that are required for the program.

| Person                            | July            | August       | September    | October      | November     | December        | January         | February                     | March        | April        | May               | June              |
|-----------------------------------|-----------------|--------------|--------------|--------------|--------------|-----------------|-----------------|------------------------------|--------------|--------------|-------------------|-------------------|
| <b>PRG 1 (FM-Family Medicine)</b> |                 |              |              |              |              |                 |                 |                              |              |              |                   |                   |
| Archer, D                         | FM:SportsMed-SC | FM:MedA-SC   | FM:MedB-SC   | FM:MedC-SC   | FM:Gen-PCMH  | FM:FPC2-PCMH    | FM:Derm-SC      | FM:Card-VA (2/1 - 2/28)      | FM:AmbGyn-SC | EM           | FM:Card-SC        | PED:COMMUNITY     |
| Wolf, B                           | FM:Gen-PCMH     | FM:AmbGyn-SC | FM:Card-SC   | FM:Card-VA   | FM:ComMed-SC | FM:Derm-SC      | FM:FPC2-PCMH    | FM:Gen-PCMH (2/1 - 2/28)     | FM:MedA-SC   | FM:MedB-SC   | FM:MedC-SC        | FM:SportsMed-SC   |
| <b>PRG 2 (FM-Family Medicine)</b> |                 |              |              |              |              |                 |                 |                              |              |              |                   |                   |
| Aktar, A                          | FM:Card-SC      | FM:Card-SC   | FM:Card-VA   | FM:ComMed-SC | FM:Derm-SC   | FM:FPC2-PCMH    | FM:Gen-PCMH     | FM:MedA-SC (2/1 - 2/28)      | FM:MedB-SC   | FM:MedC-SC   | FM:SportsMed-SC   | DM:WOMEN'S HEALTH |
| Julka, V                          | FM:ComMed-SC    | FM:Derm-SC   | FM:FPC2-PCMH | FM:Gen-PCMH  | FM:MedA-SC   | FM:MedB-SC      | FM:MedC-SC      | FM:SportsMed-SC (2/1 - 2/28) | FM:AmbGyn-SC | FM:Card-SC   | FM:Card-VA        | EM                |
| O'Doull, K                        | FM:MedA-SC      | FM:MedB-SC   | FM:MedC-SC   | FM:AmbGyn-SC | FM:Card-SC   | FM:Card-VA      | FM:ComMed-SC    | FM:Derm-SC (2/1 - 2/28)      | FM:FPC2-PCMH | FM:Gen-PCMH  | FM:SportsMed-SC   | DM:WOMEN'S HEALTH |
| Parke, B                          | FM:MedB-SC      | FM:Card-SC   | FM:Card-VA   | FM:ComMed-SC | FM:Derm-SC   | FM:Elect        | FM:FPC2-PCMH    | FM:Gen-PCMH (2/1 - 2/28)     | FM:MedA-SC   | FM:MedB-SC   | FM:MedC-SC        | FM:SportsMed-SC   |
| <b>PRG 3 (FM-Family Medicine)</b> |                 |              |              |              |              |                 |                 |                              |              |              |                   |                   |
| Baker, T                          | FM:SportsMed-SC | FM:MedA-SC   | FM:MedB-SC   | FM:MedC-SC   | FM:AmbGyn-SC | FM:Card-SC      | FM:Card-VA      | FM:ComMed-SC (2/1 - 2/28)    | FM:Derm-SC   | FM:FPC2-PCMH | DM:WOMEN'S HEALTH | EM                |
| Gomez, M                          | EM              | FM:AmbGyn-SC | FM:MedA-SC   | FM:MedB-SC   | FM:MedC-SC   | FM:SportsMed-SC | FM:AmbGyn-SC    | FM:Card-SC (2/1 - 2/28)      | FM:Card-VA   | FM:ComMed-SC | FM:Derm-SC        | FM:Gen-PCMH       |
| Wallace, C                        | FM:AmbGyn-SC    | FM:Card-SC   | FM:Card-VA   | FM:MedA-SC   | FM:MedB-SC   | FM:MedC-SC      | FM:SportsMed-SC | EM (2/1 - 2/28)              | FM:AmbGyn-SC | FM:Gen-PCMH  | FM:Derm-SC        | FM:Card-VA        |

There are two ways to create your Block Schedules: Online and MedScheduler

## Building a block schedule online

For more information about building block schedules go to [Help>Tutorial Videos>Block Schedule \[4.1\] Block Schedule-Creating a block schedule on the web](#)

Select an Option:

- Option 1 – Build schedules for Residents and Fellows for all intervals in the academic year at one time. Use this option when the schedule follows the exact intervals in your academic year.
- Option 2 – Build schedules for Residents and Fellows one interval at a time. Use this option when you have split rotations or the schedule does not follow the exact intervals in your academic year. **This is the recommended option for building trainee schedules.**
- Option 3 – Build schedules for Faculty members. Consider extending the End Date to a year in the future to keep from entering their schedules every year.

**Block Scheduling Create/Edit**

---

**Create/Edit Rotations**

Person: Abdallah, Mohamed Abdallah Al Haji Academic Year: 2022 - 2023 FL1

[Access All Faculty](#)

Include Archived People  Include Archived Rotations in the List Below

**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. [Deleted Rotation History](#) | [Delete All](#)

[New](#) Rotations

|                        | Edit                     | Start Date | End Date   | Rotation                                                   | Department            | Division                  | Status | PGY | Program                   | Rotation Pager | Personal Pager | Compensation | Notes | History                 |
|------------------------|--------------------------|------------|------------|------------------------------------------------------------|-----------------------|---------------------------|--------|-----|---------------------------|----------------|----------------|--------------|-------|-------------------------|
| <a href="#">Delete</a> | <input type="checkbox"/> | 7/1/2022   | 8/31/2022  | UMN-IMED-GI-CONSULTS-VAMC                                  | UMN-Internal Medicine | UMN-IMED-Gastroenterology | FL3    | 6   | UMN-IMED-Gastroenterology | ---            | (612) 899-2897 | ☉            |       | <a href="#">History</a> |
| <a href="#">Delete</a> | <input type="checkbox"/> | 7/11/2022  | 7/12/2022  | MMCGME-VACATION (NON-PRIMARY ROTATION ONLY)                | MMCGME                |                           | FL3    | 6   | UMN-IMED-Gastroenterology | ---            | (612) 899-2897 |              |       | <a href="#">History</a> |
| <a href="#">Delete</a> | <input type="checkbox"/> | 8/12/2022  | 8/12/2022  | MMCGME-VACATION (NON-PRIMARY ROTATION ONLY)                | MMCGME                |                           | FL3    | 6   | UMN-IMED-Gastroenterology | ---            | (612) 899-2897 |              |       | <a href="#">History</a> |
| <a href="#">Delete</a> | <input type="checkbox"/> | 8/16/2022  | 8/16/2022  | MMCGME-PROFESSIONAL CONFERENCE (NON-PRIMARY ROTATION ONLY) | MMCGME                |                           | FL3    | 6   | UMN-IMED-Gastroenterology | ---            | (612) 899-2897 |              |       | <a href="#">History</a> |
| <a href="#">Delete</a> | <input type="checkbox"/> | 9/1/2022   | 10/31/2022 | UMN-IMED-GI-West Bank-UMMC                                 | UMN-Internal Medicine | UMN-IMED-Gastroenterology | FL3    | 6   | UMN-IMED-Gastroenterology | ---            | (612) 899-2897 | ☉            |       | <a href="#">History</a> |
| <a href="#">Delete</a> | <input type="checkbox"/> | 10/24/2022 | 10/26/2022 | MMCGME-PROFESSIONAL CONFERENCE (NON-PRIMARY ROTATION ONLY) | MMCGME                |                           | FL3    | 6   | UMN-IMED-Gastroenterology | ---            | (612) 899-2897 |              |       | <a href="#">History</a> |

**Avoid gaps in block schedule dates.** It is important to remember that residents need to have a rotation assigned to them for every week of the academic year. Rotations must be assigned even for time a resident spends in non-reimbursable activities. To identify time when a resident is not participating in reimbursable activities, a generic MMCGME block is inserted in the schedule.

If you notice that information (such as status, PGY, etc.) is incorrect in the block schedule, please notify MMCGME Services. Information flows from the Personnel Record module to the Block Schedule module, but remember updates made in the Block Schedule module **DO NOT** update Personnel Record information.

1. Click **Schedules**.



2. In the top box labeled Block Scheduling, click **Schedule Rotations**.
3. Select the person from the dropdown list
4. Select the academic year to be used for scheduling
5. Select the appropriate scheduling option described below to add rotations for the selected person.

**Option Two: Used for adding resident or fellow schedules**

1. Click **Option Two**
2. The start and end date are populated from the academic year template
3. Resident or fellow personal information is populated from Personnel Record files
4. Rotation department defaults to Rotation Favorites. If a rotation is not in Rotation Favorites, select the department where the rotation occurs from the Rotation Department dropdown list. When the screen refreshes, the Rotation dropdown list is populated with the rotations from that department
5. Select the correct rotation from the Rotation dropdown list
6. Click **Save and Continue**
7. Repeat until the block schedule for the academic year is complete

## Create Faculty Schedules

**Option Three: Used to build faculty schedules.**

1. Select the person from the dropdown list
2. Click **Option Three**
3. Enter the start and end date of the academic year
4. Select the appropriate rotation
5. Click **Save**

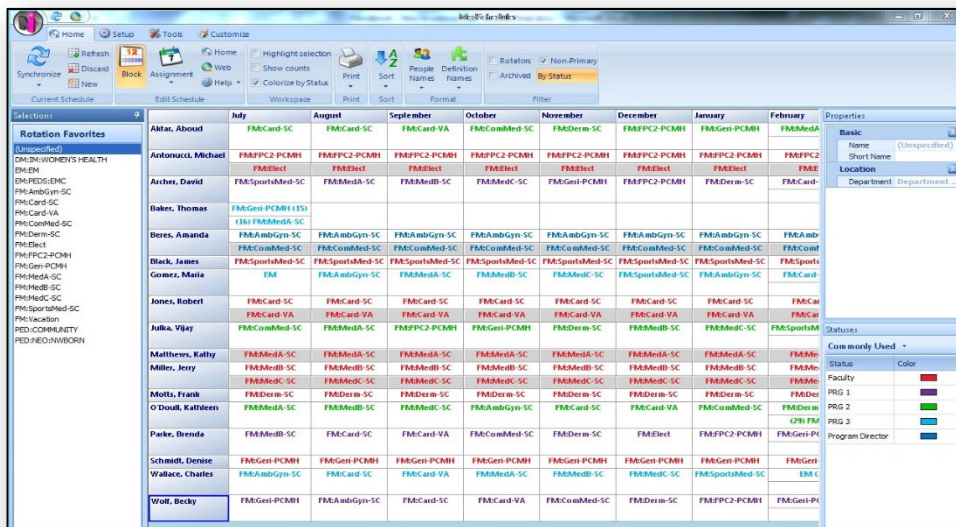
## Building a block schedule using the MedScheduler

For more information about MedScheduler go to [Help>Tutorial Videos>MedScheduler \[6.1\] MedScheduler-Overview and installation](#)

MedScheduler is a Windows desktop application that allows you to easily create your schedules using 'drag and drop' capabilities. MedScheduler can be installed directly onto your computer workstation. It communicates securely over the internet directly with your New Innovations online database. Once you are done modifying schedules in MedScheduler, you simply synchronize and your online database will be immediately updated to reflect the changes.

### Why is this important?

- Create and edit the entire block schedule for your program at one time
- Use the easy 'drag and drop' functionality
- Set alerts for rule limitations and maximum sizes
- Easy print, PDF and email options



You will be required to log in each time MedScheduler is started or synchronized. MedScheduler will retain the department and username information regarding your last login.

1. Go to **Start on your computer > All Programs > New Innovations, Inc. > MedScheduler**

**NOTE:** You must first download the MedScheduler application to your desktop. To do so, go to New Innovations and select **Schedules> Install MedScheduler (the box appears in the lower right hand corner of the screen)** and follow the download instructions on the page.

2. After loading, the *Synchronization Wizard* dialog box will appear. Click **Next** to continue.
3. Enter your **Login Information**: The Institution Login will always be MMCGME. Enter your User

Name and Password and click **next** to continue.

4. Select a **Department/Division** and a **Year** then click **next** to continue.
5. Verify that you have the correct Academic Year selected and click **next** to continue.
6. Choose your **Commonly Used Statuses**. (Use the arrow buttons to transfer statuses from the Available Statuses list to the commonly used list.)
7. Verify the **Academic Year** selected for each Status and Click **Next**.
8. Click '**Finish**' and MedScheduler will proceed to load the schedule for editing.

### Creating your Block Schedule using the MedScheduler

1. Select **Block** from the “Edit Schedule” tab along the top of your screen.
2. MedScheduler offers two options for creating Block Schedules, one is By Person and the other is By Rotation. This training will cover the By Person method.



Select the By Person tab at the bottom of your screen if it's not already selected.

3. Select a **Rotation** from “Selections Panel” which is displayed on the left side of the screen.  
**NOTE:** If you do not see your desired rotation you can click “All Rotations” at the bottom of the panel and click on the “+” icon to expand department rotation lists.
4. Locate the row of the person and the column of rotation interval being scheduled and click the cell to assign the rotation to that person.
5. Repeat for all additional rotations.  
**NOTE: Rotations scheduled in the MedScheduler are not saved to RMS until synchronization.** (See Synchronization of MedScheduler below for further instruction).

### Synchronizing MedScheduler

To transfer data to RMS, it is necessary to synchronize MedScheduler. The Sync Results button displays a report listing the details and results of the last synchronization.

1. On the Home tab along the upper left of the screen, in the Current Schedule group, click **Synchronize**.
2. Click **Next** to continue.
3. Enter your Login information and click **next** to continue.
4. Click **Next** to synchronize the schedule.
5. The application will re-verify that you would like to submit your changes at this time, click **Yes**.
6. A window will appear that displays any changes that were made to the block schedule during the

synchronization, click **next**.

The application will notify you that the synchronization process has completed, click **Finish**

## Curriculum Module

The Curriculum module offers you a place to store rotation Goals and Objectives.

*For more information about curriculum module go to [Help>Tutorial Videos>Curriculum \[5.1\] Curriculum](#)*

### Why is this important?

- Automatically distribute curriculum to residents and fellows prior to their scheduled rotations
- Send emails and Home Page notifications to direct recipients to the curriculum documents
- Residents can confirm they've read and understood the rotation goals and objectives
- Program administrators can generate Confirmation Reports proving they have a process in place to distribute rotation goals and objectives and ensure that residents and faculty read and understood them prior to the start of their rotations
- Check resident compliance on Curriculum confirmation



The screenshot shows a web interface for the Curriculum module. At the top, there are tabs for 'Listing' and 'Confirmation Report'. Below the tabs, there is a 'New' button and a section for 'Curriculum Definitions'. A checkbox labeled 'Include Archived Curricula' is present, along with a '\* Archived' indicator. The main content is a table with three columns: 'Name', 'Assigned People', and 'Archive/Activate'. Each row represents a curriculum definition with a list of medical specialties and corresponding links for 'Edit', 'Delete', 'Assigned People', and 'Archive'. A 'Report to Excel' link is located at the bottom right of the table.

| Name                                                                                   | Assigned People                 | Archive/Activate        |
|----------------------------------------------------------------------------------------|---------------------------------|-------------------------|
| <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Cardiology</a>                 | <a href="#">Assigned People</a> | <a href="#">Archive</a> |
| <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Comm. Medicine</a>             | <a href="#">Assigned People</a> | <a href="#">Archive</a> |
| <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Dermatology</a>                | <a href="#">Assigned People</a> | <a href="#">Archive</a> |
| <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Dermatology (Revised 2016)</a> | <a href="#">Assigned People</a> | <a href="#">Archive</a> |
| <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Fam. Med. A</a>                | <a href="#">Assigned People</a> | <a href="#">Archive</a> |
| <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Fam. Med. B</a>                | <a href="#">Assigned People</a> | <a href="#">Archive</a> |
| <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Fam. Med. C</a>                | <a href="#">Assigned People</a> | <a href="#">Archive</a> |
| <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">FPCQ</a>                       | <a href="#">Assigned People</a> | <a href="#">Archive</a> |
| <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Geriatrics</a>                 | <a href="#">Assigned People</a> | <a href="#">Archive</a> |
| <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Sports Medicine</a>            | <a href="#">Assigned People</a> | <a href="#">Archive</a> |

If your Curriculum Definitions are changing for the new academic year you can copy and edit an old Curriculum Definition rather than create new definitions.

### Create Curriculum for Rotations

1. Go to *Schedules > Curriculum*
2. Click New
3. Name - In the text field, enter the name of the curriculum document, such as 'Pediatric Neonatal Rotation Goals and Objectives'
4. Assign Curriculum
5. Assign by Status - Select the status types who are required to read the curriculum.
6. Assign by Rotation - Select the name of the Rotation the curriculum applies to. Narrow the list to only your department rotations by checking the box underneath the list labeled Limit choices above to rotations from (your department). NOTE: only rotations that are marked Requires Curriculum are available in the list.
7. Email, Confirmation and Notification - Selecting either one of the methods below will place a link on the person's Home page AND send an email. If neither of these are selected, no link will appear on the Home page.

- 'Send automatic email notifications and allow people to confirm this curriculum \_\_ days before the rotation begins.' - Check this box to place a Curriculum link on the person's Home Page on the day the email is sent.
  - 'Send an email notification when this Curriculum Definition is saved for rotations that start between [start date] and [end date].' - Check this box to send an immediate notification to the people assigned the curriculum and create a Curriculum link on their Home Page. Check the third checkbox to send a confirmation email to administrators listing those people who were sent emails. Enter the appropriate administrator email addresses in the text box.
8. Active Dates - Active dates are optional and do not need to be configured unless the user wishes to apply the curriculum only to a specific date range. Set the dates for the period of time the curriculum should be used. (Example: When a program distributes a new curriculum at the start of an academic year, the Active Dates boxes could be used to designate which curriculum is distributed during the current academic year and which one will be distributed after the start of the new academic year.)
    - Apply Curriculum to rotations that begin on or after this date. This option checks the Block Schedule for people whose rotations begin on or after the specified date.
    - Apply Curriculum to rotations that begin on or before this date: checks the block schedule for people whose rotations begin on or before the specified date
  9. Upload File - File can be no larger than 12 MB.
    - Click Choose File to find the file on your computer.
    - Select the document.
    - Click Open
  10. Click Save New Curriculum to upload the file and save the new curriculum definition.

## Copy a Curriculum Definition

Use these instructions to create a new Curriculum with the same configurations as the copy. The original Curricular Document remains with the copied Curriculum Definition. If you want to associate a different Curricular Document with the copied Curriculum Definition, use the **Swap** feature.

1. Select **Schedules**.
2. In the top box labeled Block Scheduling, click **Curriculum**. Click the **Edit** link located to the left of the Curriculum you wish to copy.
3. Scroll to the bottom of the screen and click the **Clone** link and then the **OK** button.
4. Enter a unique name for the new Curriculum Definition; then click the **Save** link.
5. If needed, click the **Edit** link located to the far left of the new Curriculum Definition, change any configuration, and then click the **Save Configuration** link.
6. Edit the active dates and archive the old curriculum.

## Swap One Curricular Document for Another

You may switch one Curricular Document for another at any time. However, if anyone has confirmed reading their curriculum, you must first remove all confirmations. The people that confirmed will then be assigned the new (and unconfirmed) Curricular Document, unless you change the Curriculum Definition to exclude them.

1. Select **Schedules**.
2. In the top box labeled Block Scheduling, click **Curriculum**.
3. Click the **Edit** link located to the left of the Curriculum you wish to copy.
4. Click the **Remove Confirmations** link and then click the **OK** button. Clicking the **Remove Confirmations** link. Removed confirmations cannot be viewed using the Confirmation Report or any other method. The **Remove Confirmation** link will not be present if no one has confirmed the Curriculum.
5. If desired, edit the Curriculum Definition and then scroll to the bottom of the screen and click the **Save Curriculum** link. The new Curriculum will be assigned as configured. You may revise an existing Curricular Document by editing it on your computer and then swapping it with the old one. Or, you may upload the revised document to a new Curriculum Definition and reassign it.

**TIP:** When swapping out old curricular documents for new curricular documents, it is recommended to print a confirmation report for the previous year for your RRC files.

## Edit a Curriculum Definition

1. Select **Schedules**.
2. In the top box labeled Block Scheduling, click **Curriculum**.
3. Click the **Edit** link located to the left of the Curriculum you wish to edit. Make changes as necessary and then click the **Save Curriculum** link at the bottom of the screen.

If you check either email notification box while editing an existing Curriculum Definition, an email will be sent to everyone meeting the Rotation and Status Type criteria, including those who have already received an email notification when the Curriculum Definition was first created.

## Delete a Curriculum Definition

It is easy to delete a Curriculum Definition associated with that Curricular Document that no one has confirmed. You simply click a **Delete** link, the Curriculum Definition disappears, and anyone who had been assigned the definition's associated Curricular Document will no longer be able to view it. However, if anyone has already confirmed a document, you must remove those confirmations before the Curriculum Definition can be deleted. If confirmations are removed and a Curriculum Definition deleted, no one will be able to access the document and there is no way to determine if a person ever read and confirmed it.

1. Select **Schedules**.
2. In the top box labeled Block Scheduling, click **Curriculum**.
3. If the **Delete** link is active (NOT disabled), go to Step 3. If the **Delete** link IS disabled, click the **Edit** link (see first screenshot below), then click the **Remove Confirmations** and the **OK** link. Finally, click the **Curriculum** menu item located at the top of the **Edit Curriculum** screen. Go to Step 3.
4. Click the **Delete** link located to the left of the Curriculum Definition you need to delete and then click the **OK** button.



## Evaluations Module

### Review Evaluation Forms

#### Why is this important?

- Review and archive forms you no longer use.
- You can only make small edits to existing form such as a typo. You can copy an existing form to a new form to make larger edits.

### Editing a Form Already in Use

If a form already has any responses, **only edit it to correct minor errors like typos.**

#### **Why not make more substantial edits?**

Because even inadvertently changing the meaning of questions will compromise the responses given by previous evaluators.

- For substantial edits, **Copy** the form and **Edit** the copy instead of editing the original. Then update any sessions to distribute the new form instead of the original.
- If a form has yet to be distributed, feel free to make any sort of edit

### Fix a typo in a form in use

1. Go to **Evaluations > Evaluation Forms**
2. Select **Edit** from the **Actions** dropdown to the right of the form to edit
3. Edit the name or instructions by hovering over the name and clicking on the section
4. Make changes and click **Save**
5. Edit questions by hovering over the question and clicking **edit**. When you edit a question or grade scale, you get three choices. These choices depend on where the item is used. You can make changes to:
  - Just this question only (will only see if item is used elsewhere)
  - Everywhere on this form only (will only see if item is used more than once on the form)
  - Everywhere in this department (will only see this option if the question or grade scale is used on more than one form)

Some safeguards are in place to prevent and warn against disruptive edits. Make any allowed edits with care to preserve the integrity of your evaluation data.

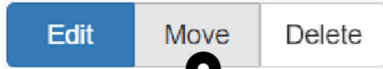
#### You cannot make these edits:

- Copy questions on the form you are editing
- Add or delete questions
- Change the type of grade scale used for a question
- Change the number of choices for a rating scale
- Edit whether a multiple choice scale can have multiple responses or not

### You can make these edits:

- Edit text of existing questions
- Edit text of grade scale labels including text for N/A Modify extra grade scale options (hi/low/default). Milestone questions added by mapping them to the form cannot be edited. Use the custom subcompetency option for instead of mapping.
- Move the location of questions

*Hover over question > click Move > click Place where you want it*



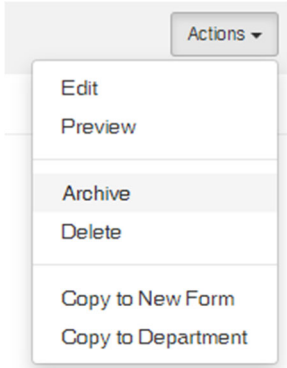
- Change default radio button selection for a grade scale
- Edit whether comments are allowed for a question
- Toggle between comments required or not
- Edit whether the question requires a response or not
- Edit minimum or maximum values for a numeric scale
- Add or delete high/low score designations
- Add or delete high/low score notifications
- Add, or delete milestone mapping
- Add or delete tags, core competencies or subcompetencies (both ACGME and OR)
- Change whether overall comments are required or not
- Edit Notifications by clicking the Notifications tab and adding or removing people from the Send To: list

### Archiving or Deleting Evaluation Forms

You can archive a form to remove it from your list and clean up your workspace. If you don't plan to distribute a form again, you should archive it.

Archived forms continue to function. An archived form:

- Is still distributed by any session
  - Can be **unarchived**
  - Has results that are still available in your reports—just click "include archived"
  - Is still available in your forms list—just click "include archived"
1. Go to **Evaluations > Evaluations Forms**
  2. Click **Archive** from the **Actions** dropdown list



## Unarchive a Form

1. Go to **Evaluations > Evaluation Forms**
2. Check the box **Include Archived**
3. Find the form you want to unarchive and click on the **Actions** dropdown
4. Click **Unarchive**

## Copy Sessions

*Evaluations > Session Manager*

### Why is this important?

- ▶ To maintain continuous distribution of evaluations from one year to the next.

There are two ways to copy your sessions:

- ▶ Configure the 'Auto Copy' feature - Excellent for sessions that use the same interval configuration each year.
- ▶ Manually copy sessions one at a time - Best for sessions where the intervals will be different next year.

## Configure Auto-Copy

Set up your sessions to automatically copy into the next academic year. The copy will be made on the last day of your current academic year. For most programs, that will be June 30.

On the Session Manager page, check the Copy icons. Those marked with a 'green' Copy icon are configured to auto-copy.

|                                            |        |    |     |        |           |           |      |  |  |  |  |
|--------------------------------------------|--------|----|-----|--------|-----------|-----------|------|--|--|--|--|
| ▶ <a href="#">G1 Rotations (2023-2024)</a> | Person | 13 | 117 | 44.4 % | 6/24/2023 | 6/23/2024 | None |  |  |  |  |
| ▶ <a href="#">G2 Rotations (2023-2024)</a> | Person | 13 | 71  | 35.2 % | 7/1/2023  | 6/30/2024 | None |  |  |  |  |
| ▶ <a href="#">G3 Rotations 2023-2024</a>   | Person | 13 | 96  | 29.2 % | 7/1/2023  | 6/30/2024 | None |  |  |  |  |

## Manually Copy a Session

For more information about copying sessions go to [Help>Tutorial Videos>Evaluations \[8.25\] Copy Sessions](#)

To maintain continuous evaluation distribution from one year to the next, all you have to do is copy your evaluation sessions to the next year. This would be also be a convenient time to make changes to your questionnaires so you can attach the new form to the new sessions. And if you'd like to change signature options for the evaluations, this is a good time for that as well.

Copy Session


Copy of **Evaluation of Faculty by Resident**

New Session Name:

**New Evaluation Schedule**

Use the  Academic Year calendar

Set my own time beginning  ending  split into  intervals

1. Click **Evaluations > Session Manager**
2. Click the **Copy**  icon next to the session to copy
3. You can rename the session if you like. We would suggest taking the word (copy) out of the title because it appears every time the session is copied. It is recommended to include the name of the program and the current year in the session name also.
3. Create the new interval schedule by selecting the academic year or entering start and end dates and selecting the number of intervals required.
4. Click **Copy Session**
8. Make changes to available date, due date and interval dates if needed
9. Click **Continue**

Repeat these steps for every session in your list.

You can easily copy your recurring conferences to the next year along with their notifications and surveys. And when the roster is created, it will pick up the next year's statuses and rotations for the people on the roster.

## Swap out a form in your session

### Why is this important?

- ▶ Distribute your new or edited Evaluation Form

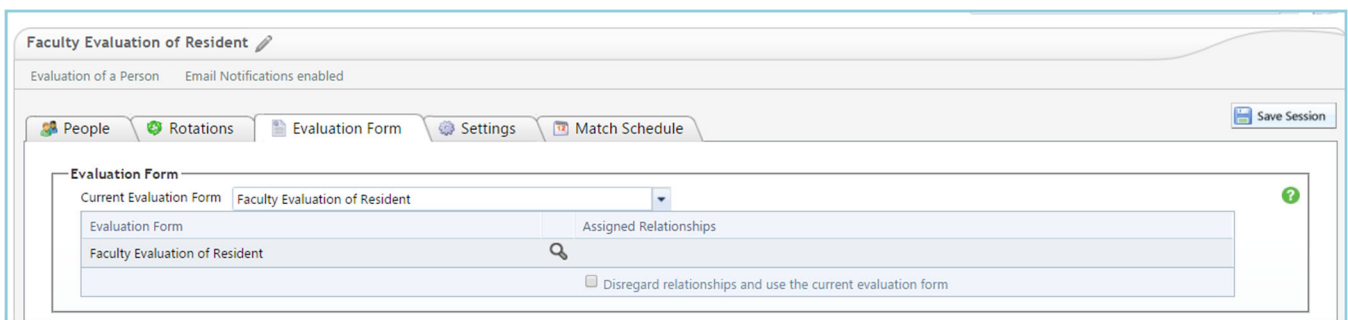
This is a two-part process: changing the form, then rematching the session.

### Select the New Form

1. Go to **Evaluations > Session Manager**
2. Click on the session you want to change.  
If you know what form you want to remove but not what session it's in, open **Evaluations > Evaluation Forms** and click on the number in the Sessions column to see what sessions that form is in.
3. In the session builder, click the **Evaluation Form** tab
4. Select the correct form from the **Current Evaluation Form** dropdown
5. Click **Save Changes/Session**

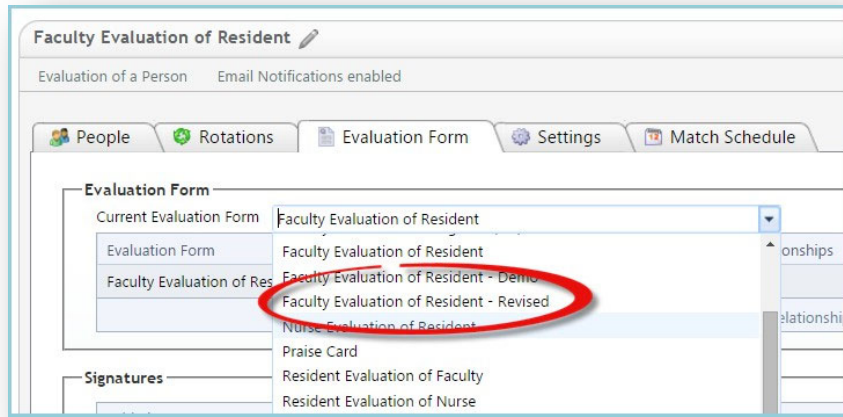
From now on, when this session matches, it will use your new form.

But what about existing matches? If the form in those matches hasn't been completed yet, you can get the new form in front of evaluators by rematching the session...



### Rematch the Session

1. Click the **Match Schedule** tab
2. Any interval that has already been matched will have the old form attached. What do you see?
  - An Interval with a match date of today's date
  - ▶ This is probably safe to rematch. It probably hasn't been completed yet
  - To remove the old form and assign the new one, delete all the existing matches and rematch the interval
  - If someone has completed the old form, you can delete the match and rematch it with the new form. This will force the evaluator to complete the new form. If you do not wish to have the evaluator complete the new form, just leave that match intact.
3. If no intervals have been matched you do not need to do anything. The system will use the new form when it creates the matches for the interval.
4. Click **Save Changes/Session**

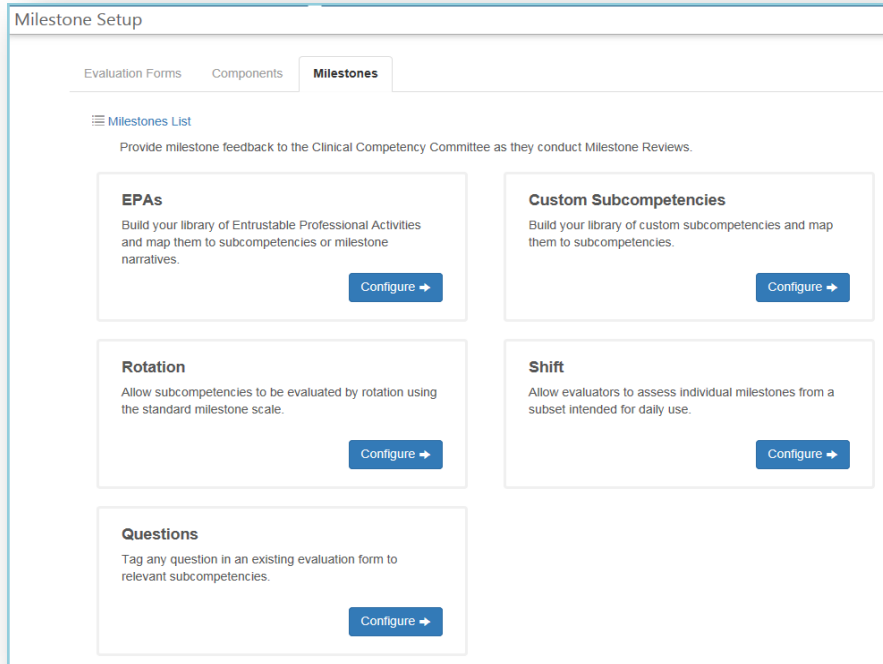


•

## Milestone Mapping

### Why is this important?

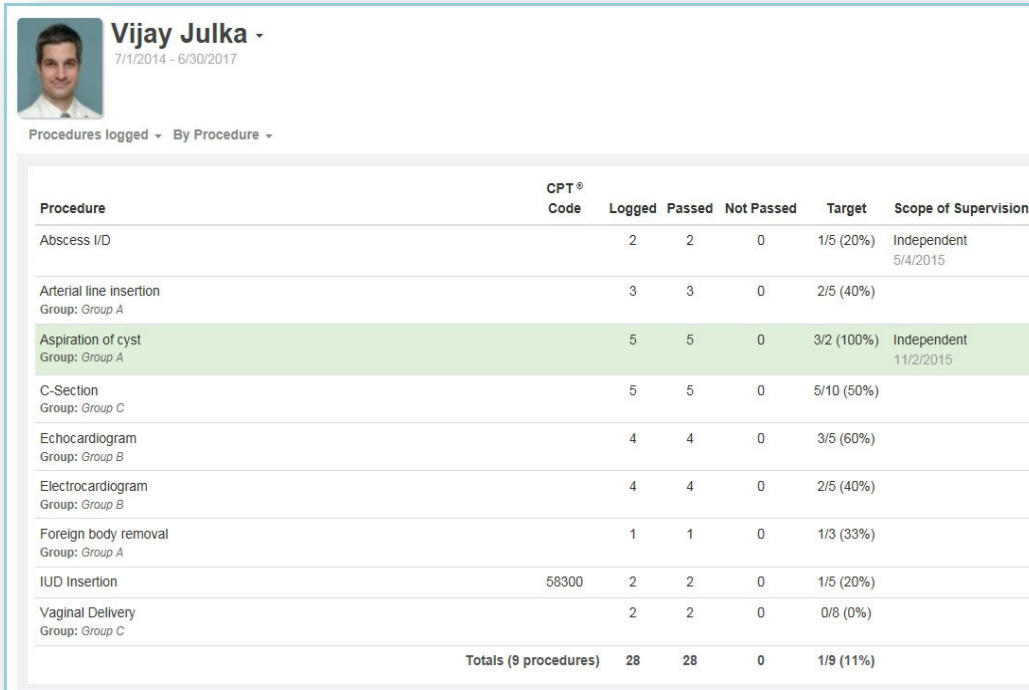
- Provide evaluation results to your CCC when they're completing the Milestone Reviews



## Logger Module

For more information about lists and configuring the logger module go to [Help>Tutorial Videos>Loggers \[10.2\] Lists or Loggers \[10.3\] Configure Module](#)

Residents can log their procedures and be automatically credentialed based on your target numbers.



**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<br>5/4/2015  |
| Arterial line insertion<br>Group: Group A |           | 3      | 3      | 0          | 2/5 (40%)  |                          |
| Aspiration of cyst<br>Group: Group A      |           | 5      | 5      | 0          | 3/2 (100%) | Independent<br>11/2/2015 |
| C-Section<br>Group: Group C               |           | 5      | 5      | 0          | 5/10 (50%) |                          |
| Echocardiogram<br>Group: Group B          |           | 4      | 4      | 0          | 3/5 (60%)  |                          |
| Electrocardiogram<br>Group: Group B       |           | 4      | 4      | 0          | 2/5 (40%)  |                          |
| Foreign body removal<br>Group: Group A    |           | 1      | 1      | 0          | 1/3 (33%)  |                          |
| IUD Insertion                             | 58300     | 2      | 2      | 0          | 1/5 (20%)  |                          |
| Vaginal Delivery<br>Group: Group C        |           | 2      | 2      | 0          | 0/8 (0%)   |                          |
| Totals (9 procedures)                     |           | 28     | 28     | 0          | 1/9 (11%)  |                          |

### Verify Procedure List is Current

#### Why is this important?

- Add new procedures
- Archive procedures not used anymore
- Check Supervision and Privilege targets to keep them current.

1. Select **Logger**
2. Under the Setup menu, click **Lists & Fields**
3. Click the **New** link to the left of the **Procedures** heading.
4. Type in the name of the procedure you want to add  
Enter credentialing targets for direct, on-site, off-site or oversight numbers
5. Click the **Save** button



## Editing Roles, Locations, Patient Types and Visit Types

1. Select **Logger**
2. Under the Setup menu, click **Lists & Fields**
3. Click **Locations, Roles, Patient & Visit Types** tab
4. Click the **Edit** link

## Managing Credentialing Targets

For more information about logger go to [Help>Tutorial Videos>Loggers \[10.4\] Privileges, Supervisors & Offsets](#)

1. Select **Logger** > under **the Setup** menu, click **Lists & Fields**
2. Click **Edit** next to the procedure name.
3. Change any credential target number that you wish.

## Conferences Module

For more information about copying conferences please go to [Help>Tutorial Videos \[11.1\] Conferences-Setup](#) or [\[11.2\] Conferences- Create a New Conference](#)

New Innovations offers you a robust interface to manage conferences and didactic events for your program. Using the Manage Conferences page, you can create new conferences, manage existing conferences, take attendance and distribute conference surveys. This module allows you to set attendance requirements and generate attendance reports incorporating those standards.

### Copying Conferences

#### Why is this important?

- Provide an accurate and continuous calendar of educational conferences
- Notify attendees and speakers with email alerts
- Offer feedback with conference surveys

**Important:** Copy your conferences after your block schedule is finished so everyone on your roster has the correct status and rotation.

| Name                      | Date/Time             | Content Category                      | Speakers | Attnd | Surveys | Wednesday Core Conference                                                                                                                                                                                                                                                                                                                                   |
|---------------------------|-----------------------|---------------------------------------|----------|-------|---------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Wednesday Core Conference | 1/31/2024<br>12:15 PM | Wednesday Core Curriculum Conferences |          | ✓     |         | <a href="#">Edit Details</a><br>Wednesday Core Curriculum Conferences<br><b>1/31/2024 12:15 PM to 5:00 PM</b><br>Hennepin County Medical Center Whittier Clinic, Racer Conference Room (Resident Room)<br><a href="#">View Attendance QR Code</a><br>Notes -<br><a href="#">View Conferences in this Series</a><br>Speakers<br><a href="#">Add Speakers</a> |
| Wednesday Core Conference | 2/7/2024<br>12:15 PM  | Wednesday Core Curriculum Conferences |          |       |         |                                                                                                                                                                                                                                                                                                                                                             |
| Wednesday Core Conference | 2/14/2024<br>12:15 PM | Wednesday Core Curriculum Conferences |          |       |         |                                                                                                                                                                                                                                                                                                                                                             |
| Wednesday Core Conference | 2/21/2024<br>12:15 PM | Wednesday Core Curriculum Conferences |          |       |         |                                                                                                                                                                                                                                                                                                                                                             |
| Wednesday Core Conference | 2/28/2024             | Wednesday Core Curriculum Conferences |          |       |         |                                                                                                                                                                                                                                                                                                                                                             |

You can easily copy your recurring conferences to the next year along with their notifications and surveys. And when the roster is created, it will pick up the next year's statuses and rotations for the people on the roster.

1. Click **Conferences > Manage Conferences**
2. Click on the conference to copy
3. Click on Copy at the top
4. Edit the title if needed. You might want to take out the words COPY OF...
5. Check the box to make the copy recur
6. Enter a date range or use the academic year to set the dates for the conference
7. Make any changes to the duration or recurrence pattern

8. Information in the original conference will be copied to the new conference. Click on a tab to review the contents.
9. When you are satisfied with the configuration, go to the bottom of the page and select *Use default roster configuration* to pick up new information, such as the residents' new status, rotation and any new people in your program
10. Click **Save**

## Review Surveys

### Why is this important?

- Edit existing surveys for accuracy and thoroughness

## Conferences - Surveys - Create and Distribute

Surveys are used to collect feedback about the content and speakers of your conferences. Administrators create survey forms and add them to a conference. Any number of forms can be created and distributed to conference attendees by status type when applicable. Emails can be sent to conference attendees notifying them that the surveys are available online.

### Notes:

- Surveys without questions on them, or questions with no rating responses, cannot be used.
- Surveys that have been attached to a conference can be edited until someone completes the survey. Then the form can be viewed but not edited.
- Multiple surveys can be linked to a conference by clicking Add Another Survey Form and selecting another form from the list. Then select the status or statuses of the people who should receive the new form. Multiple statuses can be assigned to more than one form.

## Default Conference Survey Forms

Go to Conferences > Surveys > Survey Forms to view the two survey forms already created for you to use. These can be edited or you can create your own survey form.

## Create a New Survey Form

For more information about conference surveys go to [Help>Tutorial Videos \[11.6\] Conferences-Surveys](#)

1. Go to Conferences > Surveys > Surveys Forms tab
2. Click New
3. Enter a name
4. Click Save
5. Enter instructions in the designated area
6. Click Add Question
7. Enter the text of the question
8. To have the conference objectives appear on the form check the box 'Link this question to Conference Objectives'

## Responses

1. Select the appropriate response: None, New Response or Existing Response
2. Elect to display the responses horizontally or vertically on the page
3. Enter a label for each response choice
4. Enter a name for the response
5. If using an existing response, select the response from the drop-down list
6. Check the box to Include a comment box
7. Click Save

## Add a Survey to a Conference

1. Go to Conferences > Manage Conferences
  2. Click on a conference
  3. Click Edit
  4. Click the Survey Settings tab to add a survey to a conference
  5. Select the appropriate survey from the drop-down list
  6. Choose who should receive the form by status
- Date Options
1. Enter the number of days after the conference that the survey will be available
  2. Enter the number of days after the conference that the completed survey is due

# Portfolio Module

## Semi-Annual Reviews

The Portfolio Review is designed to contain and organize evidence of learning and that trainees are working towards goals and objectives set by their program. Program administrators can configure the module to capture the information their program uses for reviews. :

## Check Review Forms

### Why is this important?

- Your program may have changed policies or procedures. Make sure they're included in the form widgets.
- Edit the widgets used to ensure correct data is reported

**Semi-Annual Review** Form Settings | Unlock Form | Exit Form

Review Period: 7/1/2015 - 12/31/2015    Residency Period: 7/1/2015 - 12/31/2015    Meeting Date: (TBD)

**PROGRAM DIRECTOR REVIEW**

**Julka, Vijay**  
 PRG 2  
 Family Medicine  
[demo.mil@new-innov.com](mailto:demo.mil@new-innov.com)  
 Advisor: Amanda Beres

Comments | Signatures | Attach Files    Report Data was last captured on: 11/19/2015

**Compliance per Rotation** Review Period

Drag a column header and drop it here to group by that column

| Rotation     | Start Date | End Date   | Evaluation of Rotation | Evaluation of Faculty | Reviewed Curriculum |
|--------------|------------|------------|------------------------|-----------------------|---------------------|
| FM:ComMed-SC | 7/1/2015   | 7/31/2015  | 1 of 1                 | 1 of 1                | 1 of 1              |
| FM:Derm-SC   | 8/1/2015   | 8/31/2015  | 1 of 1                 | 1 of 1                | 1 of 1              |
| FM:FPC2-PCMH | 9/1/2015   | 9/30/2015  | 1 of 1                 | 1 of 1                | 1 of 1              |
| FM:Ger-PCMH  | 10/1/2015  | 10/31/2015 | 1 of 1                 | 1 of 1                | 1 of 1              |
| FM:MedA-SC   | 11/1/2015  | 11/30/2015 | 0 of 1                 | 0 of 2                | 1 of 1              |
| FM:MedB-SC   | 12/1/2015  | 12/31/2015 | 0 of 1                 | N/A                   | 0 of 1              |

**Conference Attendance** Review Period

| Status          | Department         | Category     | # Conferences | # Required | Present | Tardy | Excused | % Required  | % Attended |
|-----------------|--------------------|--------------|---------------|------------|---------|-------|---------|-------------|------------|
| Home Department |                    |              |               |            |         |       |         |             |            |
| PRG 2           | FM-Family Medicine | Grand Rounds | 20            | 20         | 18      | 0     | 0       | 80%         | 90%        |
| PRG 2           | FM-Family Medicine | Journal Club | 21            | 21         | 12      | 1     | 1       | 80%         | 60%        |
| Totals:         |                    |              | 41            | 41         | 30      | 1     | 1       | Avg: 75.00% |            |
| Grand Totals:   |                    |              | 41            | 41         | 30      | 1     | 1       | Avg: 75.00% |            |

**Duty Hour Rule Violations** Review Period

| Rotation     | Start Date | End Date   | Hrs/Wk | 80 Hr | 24+ | Call | Short Break | Days Off | Night Float |
|--------------|------------|------------|--------|-------|-----|------|-------------|----------|-------------|
| FM:ComMed-SC | 7/1/2015   | 7/31/2015  | 40.87  | 0     | 0   | 0    | 1           | 0        | 0           |
| FM:Derm-SC   | 8/1/2015   | 8/31/2015  | 65.71  | 0     | 0   | 0    | 0           | 0        | 0           |
| FM:FPC2-PCMH | 9/1/2015   | 9/30/2015  | 59.03  | 0     | 0   | 0    | 4           | 0        | 0           |
| FM:Ger-PCMH  | 10/1/2015  | 10/31/2015 | 65.03  | 0     | 0   | 0    | 0           | 0        | 0           |
| FM:MedA-SC   | 11/1/2015  | 11/30/2015 | 44.80  | 0     | 1   | 0    | 0           | 0        | 0           |
| FM:MedB-SC   | 12/1/2015  | 12/31/2015 | 0.00   | 0     | 0   | 0    | 0           | 0        | 0           |

1. Review the templates and make any necessary adjustments by adding/deleting/editing the widgets
2. Schedule the reviews – suggested time periods:
  - a. July – December; and
  - b. January – June

## Editing Form Templates

1. Click **Portfolio**
2. Under Reviews, select **Form Templates**
3. Choose **Edit** next to the template to customize
4. You can change the name for your review template, change your widgets, and change other options you selected when creating your template
5. Click **Save**

## Scheduling Reviews

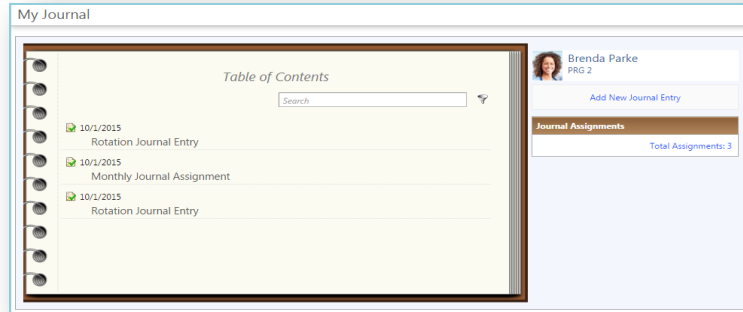
For more information about scheduling reviews please go to [Help>Tutorial Videos>Portfolio \[13.04\] Create a Review](#)

1. Select **Portfolio**
2. Under Reviews, select **Manage Reviews**
3. Click **New**
4. Choose to design a **New Form Template** or use an existing **Form Template**
5. Click **Continue**
6. Click **Add People**
7. Move the subject names in the left column to the right column to include in the review by **clicking and dragging** or by **highlighting** the name and using the arrow keys
8. Click **OK** when subject selection is complete
9. Entering the **start** and **end** date of the review period
10. Set the meeting date if desired
11. Click **Add Review Period**
12. Enter as many review periods as needed
13. Click **Continue**
14. Confirm which reviews to schedule and click **Schedule Selected Reviews**

# Journals

## Why is this important?

Keep journaling assignments current



If you would like to use Journaling as a Practice-Based Learning and Improvement tool in your program, you may want to try creating Journaling Assignments. Assignments allow you to give journaling some structure, including Instructions, Due Dates and Sign-off by key educators. You can begin shaping assignments by going to Portfolio and clicking New Journal Assignment.

## Create Assignments

[Portfolio](#)>[Journals](#)>[Manage Journals](#)>[New Journal Assignment](#)

For more information about journaling please go to [Help](#)>[Tutorial Videos](#)>[Portfolio \[13.07\] Journaling](#)

1. Go to Portfolio > Assignments
2. Click New Assignment
3. Journal Entry Title - Enter the name of the assignment that should appear in emails and in trainees' journals. (Required.)
4. Assignment Instructions - Add instructions for completing the assigned journal entry and criteria for a successful entry. (Required)
5. People - Click **Select the people** to choose who will complete this assignment. (Required)
6. Journal Entries & Due Dates - Set a due date for this assignment. (Required)
7. Click **Add another journal entry** to create additional due dates, if necessary.
8. Core Competencies - Click **Practice-Based Learning and Improvement** to open the list of Core Competencies and edit which competencies are relevant to this assignment. Practice-Based Learning and Improvement is checked by default. (Optional)
9. Assignment Approval - This optional step allows you to select who will be responsible for reviewing and approving journal assignments. See the additional notes below for more information.
10. Click Continue
11. Confirm each of the people assigned. Uncheck any that should not receive this assignment.
12. Click Distribute Selected Assignments

**New Journal Assignment**

Monthly Reflection

Describe two events that happened this month:

1. An event where you shined! Your knowledge, practice and/or communication skills were used to help a patient and/or their family
2. An event where you felt inadequately prepared to handle the situation. Describe what happened, what you learned and how you'll handle this type of situation differently in the future.

People

Select the people who should complete this assignment.

Journal Entries & Due Dates

One entry is due on [Date Picker]

Add another journal entry

Continue Cancel

**Core Competencies**  
Completing this journal assignment displays competency in [Practice-Based Learning and Improvement](#)

**Assignment Approval**  
Does this assignment need to be approved? If so, select the reviewers.

Advisor  
 Program Director  
 Associate Program Director  
Assignment is considered approved after only one person approves it.

### Why Use Assignment Approval?

You can use the Assignment Approval feature if the Journal Assignments are to be reviewed and approved by key educators in your program, such as:

**Program Director** - Defined in Program Personnel (Go to Administration > Program > Personnel)

**Associate Program Directors** - Defined in Program Personnel (Go to Administration > Program > Personnel)

**Advisors** - Defined in Personnel (Go to Personnel > Personnel Records > Select Resident > Basic Information > Advisor)

Those individuals who have been designated as reviewers of an assignment will receive an email when an assignment is submitted. If you choose more than one reviewer, they will all receive an email. However, only one of the reviewers needs to indicate his or her approval.

### Email Notifications

There are several types of email reminders that are sent:

**Assigned People:** The system automatically sends an email to the assigned people as a reminder to complete their assignments.

**Reviewers:** The system automatically sends an email to the reviewers when an assignment has been submitted.

**Delinquent:** The administrator can send additional emails to those who need reminded to complete their tasks.




### Configure Notifications:



1. Go to Portfolio > Assignments
2. Check the box(es) for those who need to be reminded
3. Click Email Reminders
4. On the Assigned People tab, click **Send Reminder**
5. On the Reviewers tab, click **Send Reminder**


Manage Journal Assignments

Below is a list of Journal Assignments in this department.

All Not Submitted Pending Approval Approved  Delete Assignments  Email Reminders  New Assignment

10/1/2012 to 5/1/2013 Ok Search

| <input checked="" type="checkbox"/>    | Due Date | Person                   | Status            | Submitted | Reviewers | Approved |
|----------------------------------------|----------|--------------------------|-------------------|-----------|-----------|----------|
| Assignment: 4/1/2013 - Monthly Journal |          |                          |                   |           |           |          |
| <input checked="" type="checkbox"/>    | 4/1/2013 | Bradshaw, David Joseph * | Alumni            |           | None      | N/A      |
| <input checked="" type="checkbox"/>    | 4/1/2013 | Brooks, Maggie           | Incoming Resident |           | None      | N/A      |
| <input checked="" type="checkbox"/>    | 4/1/2013 | Brooks, Sharon           | PRG 3             |           | None      | N/A      |
| <input checked="" type="checkbox"/>    | 4/1/2013 | Brown, Leroy             | PRG 3             |           | None      | N/A      |
| <input checked="" type="checkbox"/>    | 4/1/2013 | Carson, John             | PRG 3             |           | None      | N/A      |
| <input checked="" type="checkbox"/>    | 4/1/2013 | Collins, Phil            | PRG 3             |           | None      | N/A      |
| <input checked="" type="checkbox"/>    | 4/1/2013 | Collins, Phil            | PRG 3             |           | None      | N/A      |



## Scholarly Activity

For more information about scholarly activity please go to [Help>Tutorial Videos>Portfolio \[13.01\] Scholarly Activities](#)

### Why is this important?

- Verify that Forms are current
- Add new Forms or archive those no longer used
- Confirm all ADS categories are added to the right forms

| Scholarly Activity Forms                                                                                 |                                                                     |                            |                      |            |  |  |
|----------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------|----------------------------|----------------------|------------|--|--|
| <span>New</span> <span>Archived</span> <span>Edit Activity Identifiers</span> <span>Archive Forms</span> |                                                                     |                            |                      |            |  |  |
| Name                                                                                                     | ADS Category                                                        | Activity Description Field | Activity Date Field  | Created On |  |  |
| Abstract                                                                                                 | Faculty: Grant Leadership<br>Resident: Other Presentations          | Activity Description       | Date                 | 10/15/2010 |  |  |
| Case Conference Presentation                                                                             | Conference Presentations                                            | Activity Description       | Activity Logged Date | 03/24/2010 |  |  |
| Chapters                                                                                                 | Faculty: Conference Presentations<br>Resident: Chapters / Textbooks | Activity Description       | Activity Date        | 04/21/2012 |  |  |
| Extracurricular Activities and Awards                                                                    | Grant Leadership                                                    | Activity Description       | Activity Logged Date | 01/29/2009 |  |  |

### Check ADS Categories for Residents and Faculty

The screenshot shows the 'Scholarly Activity Forms' table with a context menu open for the 'Chapters / Textbooks' category. The menu options are:

- Chapters / Textbooks
- Grant Leadership
- Leadership or Peer-Review Role
- Other Presentations
- Participated in Research
- Teaching / Presentations
- Teaching Formal Courses
- Remove Category
- Add Faculty Category
- Add Resident Category

## Scholarly Activity - Setup

Administrators set up online forms to collect detailed information for each type of activity. New Innovations provides some basic templates which can be customized to meet program preferences for any type of scholarly activity. New forms can also be created to fit your needs.

Administrators can create and design forms that are made available to faculty and residents for the purpose of capturing all the relevant information about their scholarly activities, for example peer-reviewed journal articles and national presentations. Activities logged using these forms can then be tracked by the type of activity, ADS category or by relevant activity dates. When setting up scholarly activity forms, you can create a new form, copy an existing form or use one of our templates. Once the forms are created in each department they can be used by department members and copied to other departments the administrator is privileged in.

Only people whose personnel profile is in the department where the Scholarly Activity form was created can log activities on that form. Faculty and Residents or Fellows from outside departments will not have access to the form.

## **Create a Form**

***Portfolio>Scholarly Activity>Forms***

1. Go to Portfolio > Forms
2. Click New
3. Select Create A New Form From Scratch and then Create Form
4. You may also use one of the templated forms. Just select the form and edit any fields or names as needed.

## Milestone Reviews

For more information about Milestone Reviews please go to [Help>Tutorial Videos>Milestones \[20.01\]](#) Complete a milestone review.


### Check for Milestone Reviews

Milestone Reviews are automatically created for each 6-month review period (December and June). These are available on July 1 and Jan 1, respectively, of each academic year for each of your residents and fellows.

### Why this is important?

- After July 1, check the list of residents/fellows to make sure everyone is included
- For off-cycle residents, check the Training Records in their Personnel files for correct date

Sample Milestone Review:



**Archer, David A**  
PRG 1  
Family Medicine  
demo.mail@new-innov.com

June 2016 Draft ▾

100% Complete

Milestones
Resident Review
Attachments
Meeting Notes

**PC-1 Cares for acutely ill or injured patients in urgent and emergent situations and in all settings** *Family physicians provide accessible, quality, comprehensive, compassionate, continuous, and coordinated care to patients in the context of family and community, not limited by age, gender, disease process, or clinical setting, and by using the biopsychosocial perspective and patient-centered model of care*

| Has not achieved Level 1 | Level 1                                                                                                                                       | Level 2                                                                                                                                                                                                                                        | Level 3                                                                                                                                                                                                                                                                                                                                                | Level 4                                                                                                                                                                                                                                                                                           | Level 5                                                                                                                              |
|--------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------|
|                          | <input checked="" type="checkbox"/> Gathers essential information about the patient (history, exam, diagnostic testing, psychosocial context) | <input checked="" type="checkbox"/> Consistently recognizes common situations that require urgent or emergent medical care                                                                                                                     | <input checked="" type="checkbox"/> Consistently recognizes complex situations requiring urgent or emergent medical care                                                                                                                                                                                                                               | <input checked="" type="checkbox"/> Coordinates care of acutely ill patient with consultants and community services<br><br><input checked="" type="checkbox"/> Demonstrates awareness of personal limitations regarding procedures, knowledge, and experience in the care of acutely ill patients | <input checked="" type="checkbox"/> Provides and coordinates care for acutely ill patients within local and regional systems of care |
|                          | <input checked="" type="checkbox"/> Generates differential diagnoses                                                                          | <input checked="" type="checkbox"/> Stabilizes the acutely ill patient utilizing appropriate clinical protocols and guidelines<br><span style="background-color: #ffc107; padding: 2px;">Requires Attention</span>                             | <input checked="" type="checkbox"/> Appropriately prioritizes the response to the acutely ill patient                                                                                                                                                                                                                                                  |                                                                                                                                                                                                                                                                                                   |                                                                                                                                      |
|                          | <input checked="" type="checkbox"/> Recognizes role of clinical protocols and guidelines in acute situations                                  | <input checked="" type="checkbox"/> Generates appropriate differential diagnoses for any presenting complaint<br><br><input checked="" type="checkbox"/> Develops appropriate diagnostic and therapeutic management plans for acute conditions | <input checked="" type="checkbox"/> Develops appropriate diagnostic and therapeutic management plans for less common acute conditions<br><br><input checked="" type="checkbox"/> Addresses the psychosocial implications of acute illness on patients and families<br><br><input checked="" type="checkbox"/> Arranges appropriate transitions of care |                                                                                                                                                                                                                                                                                                   |                                                                                                                                      |

More evaluations needed to view trends

|     |      |       |
|-----|------|-------|
| AVG | PEER | PRIOR |
| N/A | 2.40 | 2.5   |

View Details



## Create an Assignment Definition

*Schedules>Assignment Scheduling>Set Up>Assignment Definitions*

1. Select **Schedules**.
2. In the lower box labeled Assignment Scheduling, under the heading Setup, click **Assignment Definitions**.
3. Click **New** in the header for the Assignment Definition table and the **New Assignment Definition** page will appear.



After each assignment is created, it is displayed in the *Assignment Definitions* table.

4. Enter the **Name** of the Assignment Definition.

A screenshot of the 'New Assignment Definition' form. It has a blue header with the text 'New Assignment Definition'. On the left, there is a yellow box with a red asterisk and the text: 'What is the name of the Assignment Definition? Short Name will be used when deemed necessary to conserve screen space. By default, the first 15 characters of the Name will be used.' To the right, there are two input fields. The first is labeled 'Name:' and contains the text 'Call - ICU'. The second is labeled 'Short Name:' and contains the text 'ICU'.

The name entered here will appear in selection lists and on the schedule. The *Short Name* field allows the assignment to appear in an abbreviated form according to schedule settings or space constraints.

5. Select the **Duty Type** from the drop down list.

A screenshot of a dropdown menu. On the left, there is a yellow box with a red asterisk and the text: 'Select the Duty Type of Assignments based on this definition:'. To the right, there is a dropdown menu with a blue border and a downward arrow. The menu is open, showing four options: 'Call', 'Backup', 'Call', and 'Clinic'. The 'Call' option is highlighted in blue.

6. Enter the **Training Location**.

A screenshot of a dropdown menu. On the left, there is a yellow box with the text: 'At what training location do Assignments of this type occur?'. To the right, there is a dropdown menu with a blue border and a downward arrow. The menu is open, showing one option: 'NI Medical Center'.

7. Set the most common **Start Time** and **Duration** for the assignment.

\* Assignments of this type are expected to begin at this time:

\* Assignments of this type are expected to have this duration:  hours:mins

8. If desired, select an identifying **Color** that will appear when the assignment is displayed on the schedule.

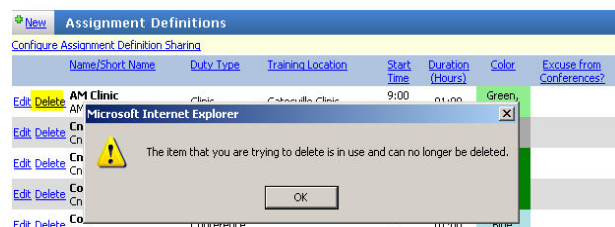
9. Click **Save Assignment Definition**.

The *Assignment Definitions* page will appear where additional definitions may be created, existing definitions may be modified.

| New Assignment Definitions                  |                               |            |                   |            |                  |              |                          |
|---------------------------------------------|-------------------------------|------------|-------------------|------------|------------------|--------------|--------------------------|
| Configure Assignment Definition Sharing     |                               |            |                   |            |                  |              |                          |
|                                             | Name/Short Name               | Duty Type  | Training Location | Start Time | Duration (Hours) | Color        | Excuse from Conferences? |
| <a href="#">Edit</a> <a href="#">Delete</a> | <b>AM Clinic</b><br>AM Clinic | Clinic     | Gatesville Clinic | 9:00 AM    | 01:00            | Green, Light |                          |
| <a href="#">Edit</a> <a href="#">Delete</a> | <b>Cnf</b><br>Cnf             | Conference | Austin VA         | 9:00 AM    | 01:00            | Gray         |                          |
| <a href="#">Edit</a> <a href="#">Delete</a> | <b>CnfInDis</b><br>CnfDH      | Conference |                   | 9:00 AM    | 01:00            | Green, Dark  |                          |

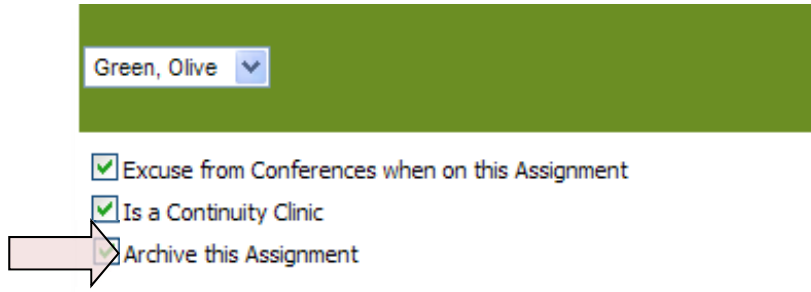
## Edit, Delete or Archive/Unarchive an Assignment Definition

1. Select **Schedules**.
2. In the lower box labeled Assignment Scheduling, under the heading Setup, click **Assignment Definitions**.
3. If desired, click the **Delete** link located to the left of an Assignment Definition- if you have not used the assignment it can be deleted.



4. If you wish to edit or archive an Assignment Definition, click the **Edit** link located to the left of an Assignment Definition. Make changes as desired and then scroll to the bottom of the screen and click the **Save Assignment Definition** link. You will notice that the option to archive this assignment requires you to select the corresponding checkbox. See the example below.





**NOTE:** Do not change an assignment if the wrong location code was used. You **MUST** archive the old assignment and build a new one!

- If you wish to un-archive an Assignment Definition, click the **Show Archived** link (pictured below) and then click the **Edit** link located to the left of the Archived Assignment Definition. Scroll down to just below the band of color (pictured above) and remove the check from the **Archive the Assignment** checkbox. Finally, scroll to the bottom of the screen and click the **Save Assignment Definition** link.

[Show Archived](#)

[New Assignment Definitions](#)

[Assignment Definition Sharing](#)

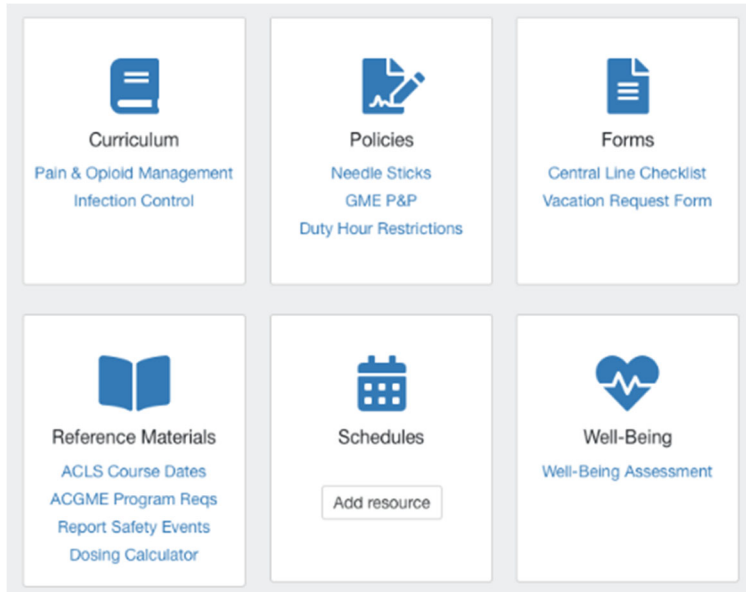
|                                             | <a href="#">Name/Short Name</a>                     | <a href="#">Duty Type</a> | <a href="#">Training Location</a>                                     | <a href="#">Start Time</a> | <a href="#">Duration (Hours)</a> | <a href="#">Color</a> |
|---------------------------------------------|-----------------------------------------------------|---------------------------|-----------------------------------------------------------------------|----------------------------|----------------------------------|-----------------------|
| <a href="#">Edit</a> <a href="#">Delete</a> | <b>ABNW-Continuity Clinic-PM</b><br>ABNW-Continuity | DH-No New Patients        | Abbott Northwestern Virginia Piper Cancer Institute (Minneapolis, MN) | 1:00 PM                    | 04:00                            | Red, Dark             |
| <a href="#">Edit</a> <a href="#">Delete</a> | <b>HCMC-Clinic-PM</b><br>HCMC-Clinic-AM             | DH-May See New Patients   | 2420 HCMC - Surgery Clinic                                            | 9:00 AM                    | 04:00                            | Orange                |

## Adding Home Page Resources

### Upload and revise documents on the home page

The home page resource panel helps you organize your residency documents for your learners and faculty.

- Each category shows up to five resource links and a See All link if there's more
- A category only appears to learners and faculty if you've added resources to that category



### Recommended Uses

Forms - use for forms your learners need for leave, vacation or other requests

Schedules - include schedules from other applications outside of New Innovations. This might include a call spreadsheet developed in Excel

Well-Being - documents for learners relating to Well-being initiatives in your hospital or program

Reference Materials - Items from the Department Manuals section you want available on the home page

Policies - Policies from the Administration module you want to share on the home page


Curriculum - upload curriculum documents that you want distributed outside of the Curriculum module

## Add a Resource


For Forms, Schedules, Well-Being, Policies, and Reference Materials:  
Load resources to Department Manuals





*Once the document is uploaded*

## Add Link to Resource Panel

1. Open the home page
2. Decide which panel should hold the resource
3. Click Add resource or the  on that panel
4. If you're in the Curriculum panel, you can click between a Curriculum tab and a Department Manuals tab to see documents in either location. Other panels only see the Department Manuals
5. Click to checkmark any document you want in this panel.  
Uncheck any checked document to remove it from the panel.
6. Click Done

## Remove Resource

1. Click the  on any panel
2. Find the resource you want to remove
3. Click Remove in the Actions column

| Name                                                                | Folder | Type                                                                                       | Size (KB) | Owning Department  |
|---------------------------------------------------------------------|--------|--------------------------------------------------------------------------------------------|-----------|--------------------|
| <input type="checkbox"/> <a href="#">Forms</a>                      | ●      |  Folder | N/A       | FM-Family Medicine |
| <input type="checkbox"/> <a href="#">Policies and Procedures</a>    | ●      |  Folder | N/A       | FM-Family Medicine |
| <input type="checkbox"/> <a href="#">Evaluation Sessions Manual</a> |        |  .doc   | 379       | FM-Family Medicine |
| <input type="checkbox"/> <a href="#">Procedure Logger Manual</a>    |        |  .doc   | 759       | FM-Family Medicine |

## Update Policies

*Administrations>Program>Policies*

### Why is this important?

- Policies change from year to year. Make sure you have the latest version of each document

Update in **Administration>Program>Policies**

| Policy                          | Type                           | Resident Compliance | Faculty Compliance | File Attachment               |
|---------------------------------|--------------------------------|---------------------|--------------------|-------------------------------|
| Americans With Disabilities Act | Accommodation for Disabilities | 0%                  | 0%                 | <a href="#">View Document</a> |

## Department Announcements

### Revise and update announcements

### Why is this important?

- Information contained in department notices may change or become outdated from year to year

Update by going to the home screen ( > Scroll to Announcements > )  
Choose the Announcement and select **Open**, edit as necessary, click **Save**