

Preparing for the New Academic Year Training Outline

Section	Page	Recommended Webinar
Administration Module- Required <ul style="list-style-type: none"> Review and update as necessary the PD, APD and Program Coordinator Create the new academic year & a recurring academic year 	Pages 4-6 Pages 7-11	Help>Tutorial Videos>Program Administration [2.07] Admin-Academic Year>Create
Personnel-Required <ul style="list-style-type: none"> Importing or Addition of trainees into RMS Review the people in your program and request anyone not needed to be archived Create Program Specific Onboarding Checklists Make sure all required data is up to date for your program 	Pages 12-14 Page 15 Pages 15-20 Pages 21-23	Help>Tutorial Videos>Personnel [3.06] Personnel-ERAS Import Help>Tutorial Videos>Personnel [3.09] Personnel-Create Checklists Help>Tutorial Videos>Personnel [3.08] Personnel-Manage Attached Files
Block Scheduling-Required <ul style="list-style-type: none"> Review Rotation Names How to request New Rotations or Edits to old ones MMCGME Rotations Setting up Rotation Favorites Reviewing, Setting up Rotation Requirements How to Build a block schedule in New Innovations/ MedScheduler 	Page 24 Pages 24-26 Pages 26-27 Pages 28-29 Pages 29-30 Pages 31-34	Help>Tutorial Videos>Block Schedule [4.0] Block Schedule-Block Schedule Basics Help>Tutorial Videos>Block Schedule [4.10] Block Schedule-Creating a block schedule on the web
Curriculum Know when to: <ul style="list-style-type: none"> Create a New Curriculum Definition Copy a Curriculum Definition Swap one document for another Edit a Curriculum Definition Delete a Curriculum Definition 	Pages 35-38	Help>Tutorial Videos>Curriculum [5.1] Curriculum

<p>Evaluations</p> <ul style="list-style-type: none"> • Review evaluation forms • Archiving/Deleting Form • Unarchiving a form • Copy Sessions or Configure Auto Copy • Swap out a form in a session • Milestone Mapping 	<p>Page 39 Page 40 Page 41 Pages 41-42 Page 43-44 Page 45</p>	<p>Help>Tutorial Videos>Evaluations [8.25] Copy Sessions</p>
<p>Logger</p> <ul style="list-style-type: none"> • Verify Procedure list • Editing Roles, Locations, Patient & Visit Types • Managing Credentialing Targets 	<p>Page 46 Page 47 Page 47 Page 47</p>	<p>Help>Tutorial Videos>Loggers [10.2]Lists Help>Tutorial Videos>Loggers [10.3] Configure Module Help>Tutorial Videos>Loggers [10.4] Privileges, Supervisors & Offsets</p>
<p>Conferences</p> <ul style="list-style-type: none"> • Copy Conferences • Update or create survey forms • Create form and distribute conference surveys 	<p>Pages 48-49 Pages 49-50 Pages 49-50</p>	<p>Help>Tutorial Videos [11.1] Conferences-Setup Help>Tutorial Videos [11.2] Conferences-Create a New Conference Help>Tutorial Videos [11.6] Conferences-Surveys</p>
<p>Portfolio</p> <ul style="list-style-type: none"> • Check/edit semi-annual review forms as necessary • Scheduling Reviews • Creating & Updating Journal Assignments • Creating and Update Scholarly Activity Forms • Check for Milestone Reviews 	<p>Pages 51-52 Page 52 Page 53 Pages 53-55 Pages 55-57 Page 58</p>	<p>Help>Tutorial Videos>Portfolio [13.04] Create a Review Help>Tutorial Videos>Portfolio [13.05] Managing Reviews Help>Tutorial Videos>Portfolio [13.07] Journaling Help>Tutorial Videos>Portfolio [13.01] Scholarly Activities</p>
<p>Schedules- Schedule Assignments</p> <ul style="list-style-type: none"> • Review your assignments • Create an Assignment Definition • Edit, Delete, Archive or Unarchive an assignment 	<p>Page 59 Page 60-61 Pages 61-62</p>	
<p>Home Page Resources</p> <ul style="list-style-type: none"> • Uploading and Revising Documents on the home page • Adding a resource/Adding/Removing a link to the resource panel • Updating policies • Review and Update Announcements 	<p>Page 63 Page 64 Page 65 Page 65</p>	