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EXCELLENCE IN MEDICAL EDUCATION

Rotation Checklist Handbook

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INTRODUCTION

Use the Rotation Checklist to assign checklists to recipients who are on the block schedule. Recipients should:

- Have a current Training Record which means the record is active at the time the checklist is distributed
- Be on the Block Schedule. The location of the rotation does not matter – it can be a rotation from a principal program or a rotator program

There are no other requirements to use this checklist

WHO CAN USE CHECKLISTS?

You can take advantage of this feature whether you are a GME administrator or a Program administrator. Rotating recipients and fellows can use their checklists to indicate their own progress. See Appendix A for details.

PREPARE TO RECEIVE ROTATORS

Before you begin building your checklist for visiting recipients and fellows, you may want to make a list of things you distribute and collect from visiting recipients and fellows as well as your recipients assigned on outside rotations or rotations in programs that need additional information from a rotator.

For example:

- Licenses & Certifications
- Contact information
- Policies and procedures
- Proof of insurance

This worksheet can help you collect all pertinent details:

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ROTATION CHECKLIST WORKSHEET

Prepare to Receive Rotators

1. **Who enters Rotation records into the database?** ☐ GME ☐ Program Admin
2. **When should the checklist be sent?** ☐ Added to Personnel ☐ Added to Block Schedule

Step	Document Request	Provide Document	Website	Task	Who Marks this Complete?	Are there Special Conditions?
Update contact information	☑	☑	☐	☐	Program Coordinator	
Read residency handbook	☐	☑	☐	☐	Applicant	
Sign and return insurance document	☐	☑	☐	☐	GME	
	☐	☐	☐	☐		
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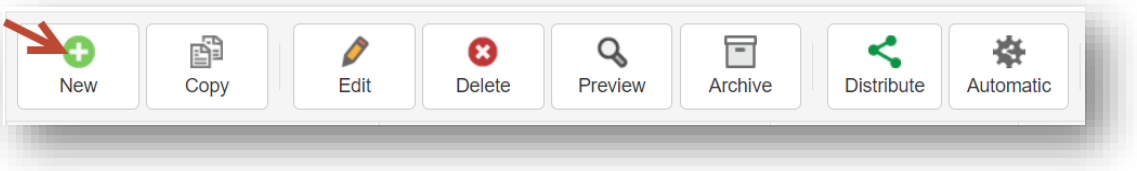
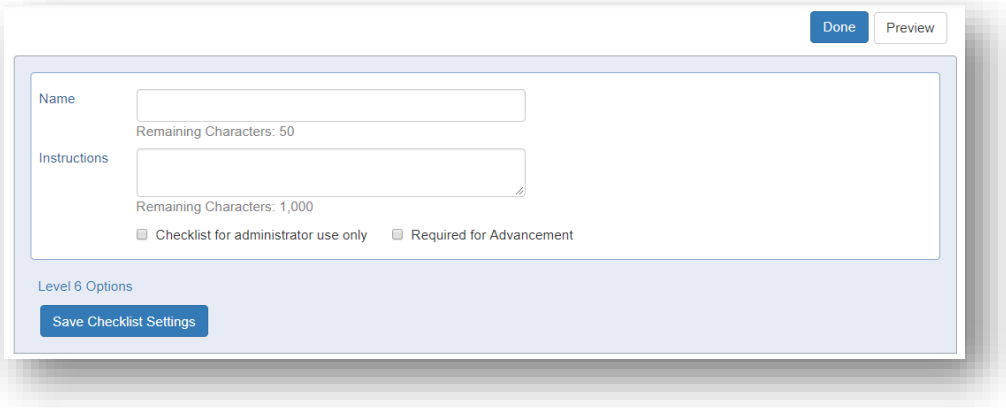
SETUP ROTATION CHECKLISTS

Rotation checklists are interactive to-do lists that can contain steps as simple as confirming a task is complete or uploading a document. You can add links that the recipient can click for more information. You can also set requirements for who should be assigned to complete steps.

1. Go to *Personnel > Checklists > Rotation*
2. Click the **Checklists** link
3. Click **New**



4. Enter a name for the checklist
5. Enter instructions for the recipient on how to complete the form
6. *Optional*
    a. 'Checklist for administrator use only' – Check this box if the entire checklist will be used by an administrator for internal use only. The checklist would not be distributed to recipients. You might use it to keep track of things you do for orientation.
    b. 'Required for Advancement' –This option is not usually used for rotators.
7. *Option for Level 6 users. Check the box to allow Level 5 Admins to:*
    a. Complete steps
        i. Complete steps when an additional reviewer has not marked complete
    b. Modify step requirements
    c. Delete this checklist
8. Click **Save Checklist Settings**



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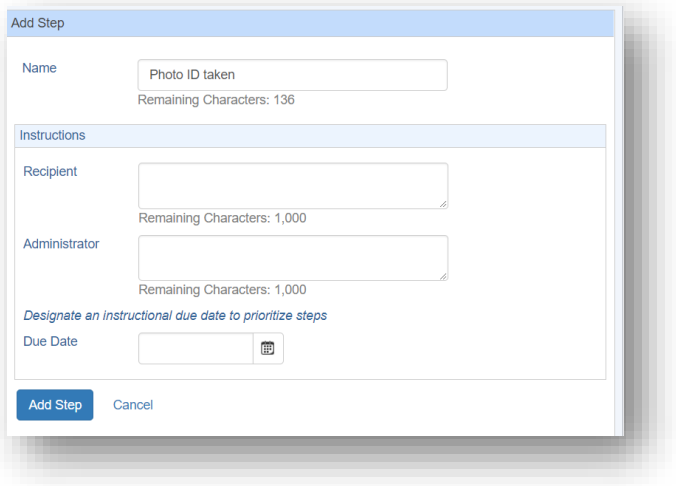
ADD NEW STEPS

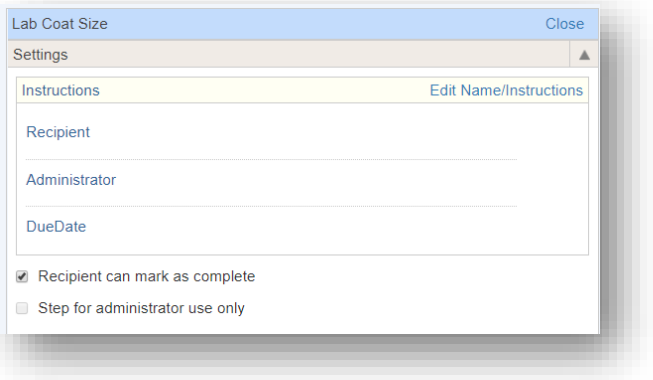
There are a variety of steps that can be added to get the data you require. To start:

1. Click **Add Step**
2. Add a step name
3. Instructions (Optional):
    a. For the recipient
    b. For administrators only
4. Designate Due Date. The purpose of the due date is to give the recipient an idea of when the step should be completed.
5. Click **Add Step**



Recipient can mark as complete**:**

Check the box to allow the recipient to complete the step. This might be used if the recipient is required to watch a video.



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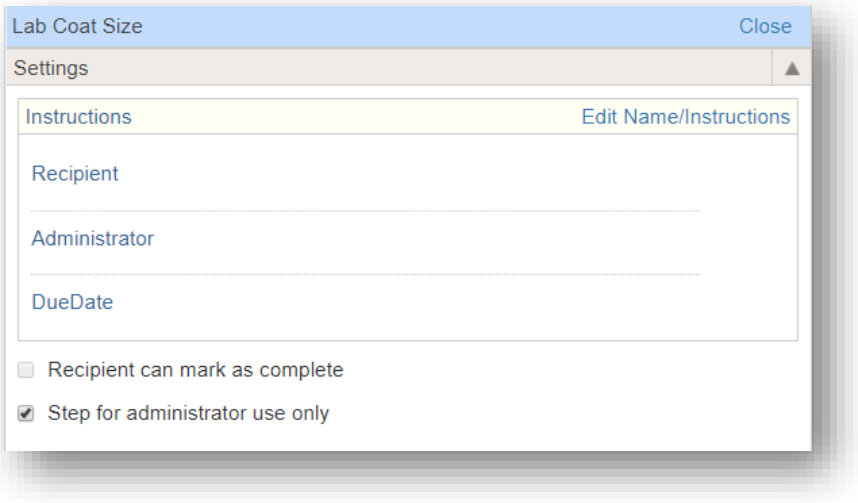
ADMINISTRATOR ONLY STEP

Check the box if this step is for administrators only. The recipient would never see this step. (Optional)

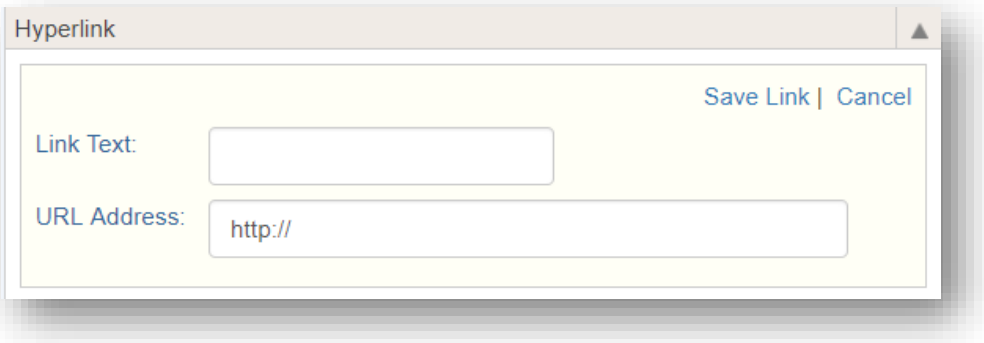


TYPES OF STEPS

HYPERLINK: ADD A WEB ADDRESS TO A STEP

This step allows you to provide a website address to your trainees. Ex: View a safety video.

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



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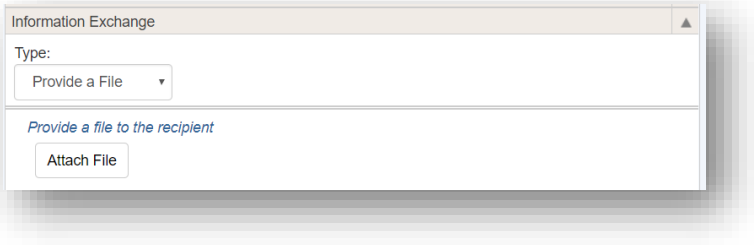
INFORMATION EXCHANGE

Use this feature to exchange documents with your recipients. There are six types of Information Exchange steps.

1. PROVIDE A FILE

Provide documents for recipients to read.

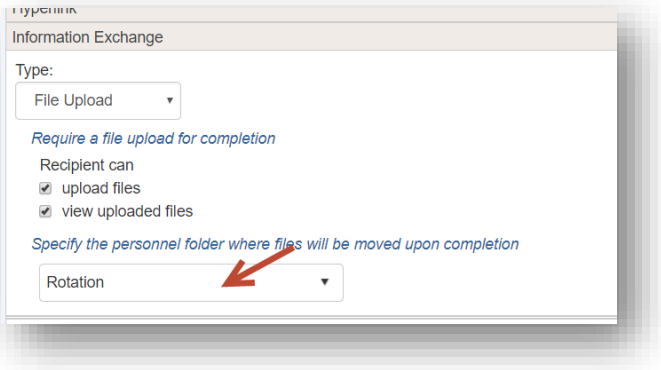
1. Click **Information Exchange**
2. Select **Provide a File**
3. Click **Attach File**
4. Select your document and click **Open**



2. FILE UPLOAD

Provide documents for the recipients to read, request them to upload documents, and specify what folder the document should be saved. They can upload a max of 5 documents. Limit 12 MB each.

1. Click **Information Exchange**
2. For Type, select **File Upload**
3. Select options: Recipient can
    a. Upload files
    b. View uploaded files
4. Optionally, specify a folder in Files & Notes where document will be moved upon step completion.
5. Click **Attach File** if you have a document you want to provide to them



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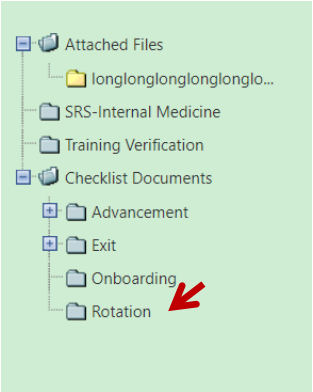
If you would like to have final approval before the step can be marked 'Complete,' you can uncheck the box to allow recipients to mark the step complete. When the recipient uploads the file or completes a form, the status of the step will be considered 'Pending' until you review and approve it.

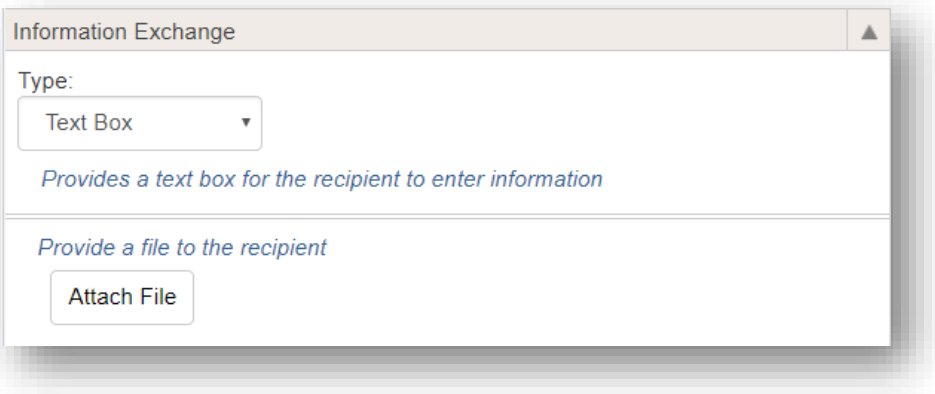
Once the step is marked 'Complete' or 'Approved,' the document will be stored in the folder you have selected in the setup. If no specific folder is designated, the document will be stored in the recipient's Files & Notes in a folder under 'Checklist Documents.' From there you can move the document to the appropriate area in Personnel.



3. TEXT BOX

Offer a text box for recipients to complete (limit of 25 characters).

1. Click **Information Exchange**
2. For Type, select **Text Box**
3. Click **Attach File** if you want to provide a document



4. FORM

You can provide a Form that contains fields from Personnel, such as address, phone number and emergency contacts. Recipients complete the Form and submit their entries to you for approval. Recipients cannot mark steps with Forms as 'Complete.' Information submitted through a Form will require administrator approval because the data will be directly added to recipients' Personnel records.

Before you can create a step with a Form, you must first create the Form.

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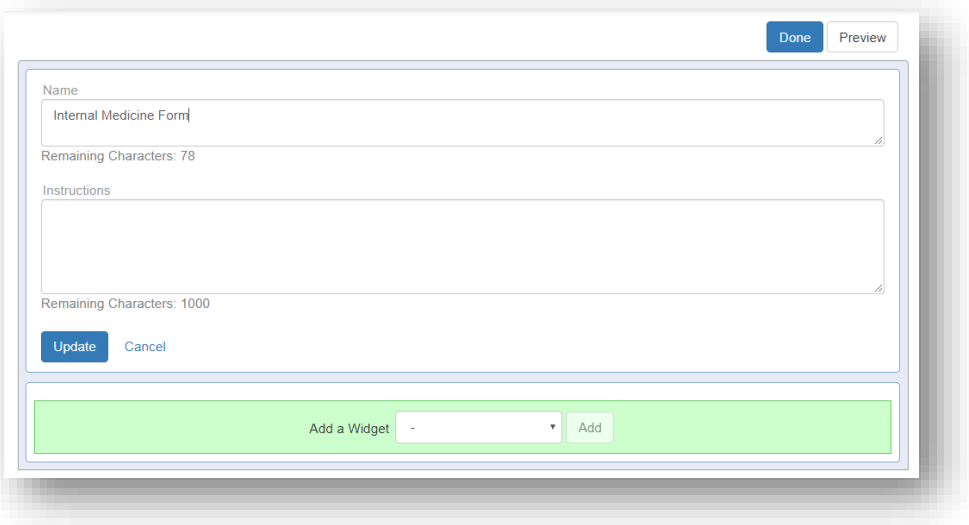
Create a Form

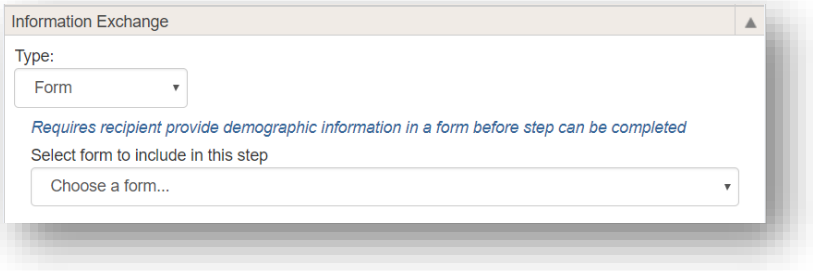
1. Go to *Personnel > Checklists > Rotation*
2. Click **Forms**
3. Click **New**
4. Enter a name for the form
5. Add instructions for the recipient
6. Click **Update**
7. Select a field from the **Add a Widget** dropdown list
8. Click **Add**
9. Use the gear icon in the widget to add instructions or customize the widget. Click **Update** when finished
10. Continue to add Widgets to your Form. Widget panels can be moved in a different order by using the drag-and-drop functionality.
11. Click **Preview** to see how the Form will appear to the recipient
12. Click **Done** at the top right when the Form is completed. The Form is automatically saved as you create it.
13. Click **Rotation** to return to the checklist page



Add Form to Checklist

A form is a means to collect information from the recipient and have it populate specific fields in Personnel.

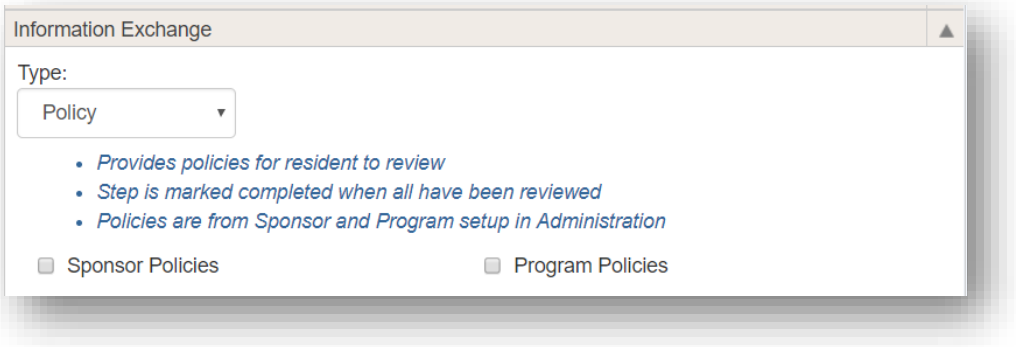
1. Click **Information Exchange**
2. For Type, select **Form**
3. Select a form from the dropdown list



5. POLICY

Recipients can confirm that they have received and read both Sponsor and Program Policies. Policies can be uploaded into the Administration module of the software before or after this step is added to a checklist.

1. Click **Information Exchange**
2. For Type, select **Policy**
3. Check **Sponsor Policies** if you want the Sponsor Policies distributed to the recipient
4. Check **Program Policies** if you want the Program Policies distributed to the recipient



Notes:

- To upload Sponsor Policies, go to *Administration > Sponsor > Policies > Add Policy*
- To upload Program Policies, go to *Administration > Program > Policies > Add Policy*
- When the policies have been confirmed by the recipient, results will appear on the CLER Visit screen in Administration

ADDITIONAL REVIEWERS

If there are people who need to monitor a few checklist items, you can select them as Additional Reviewers for specific steps. For example, maybe your Human Resource administrators are responsible for collecting updated benefit forms. You can create steps for them to receive, review and complete, if they have at least Level 1 privileges in Personnel Data.

1. Click **Additional Reviewers**
2. Click either of the following:
    a. **Add Reviewers** – Select a department and person
    b. **Use existing review group** – Select a group

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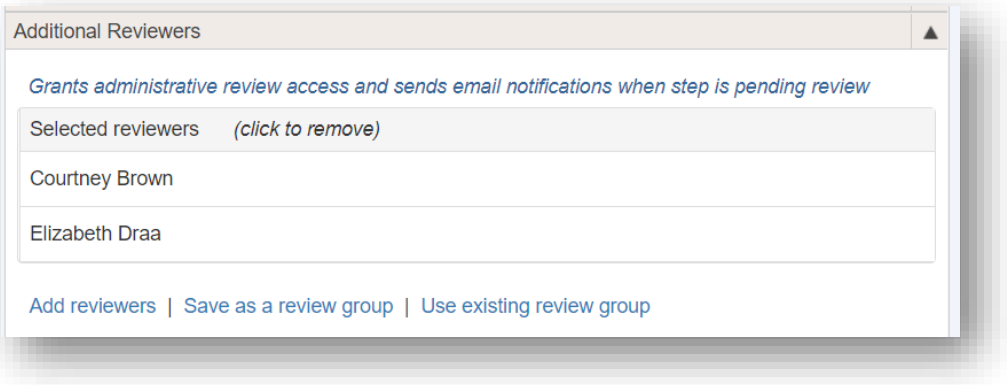
3. Click **Done**

Create Review Groups

1. Click the **Additional Reviewers** section
2. Click **Add Reviewers** – Select a department and person. Click **Done**
    a. Click **Save as a review group**
    b. Name the group
    c. Save



CONDITIONAL RECIPIENTS

Conditional Recipients settings are optional and they allow you to assign steps to a subgroup of incoming recipients and fellows who meet one of the following criteria:

- Attended Medical School
- Belongs to a certain Program:
- Does not belong to Program:
- Employer is:
- Gender is:
- Has a test score type
- Has Credential
- Has PGY level of:
- Has Visa
- Has Visa Type of:
- International Medical School Graduate
- On Rotation
- PaySource is
- Training Program is Accredited

1. Click **Conditional Recipients**
2. Select the condition for distributing this step
3. Click **Add values that qualify for this condition**

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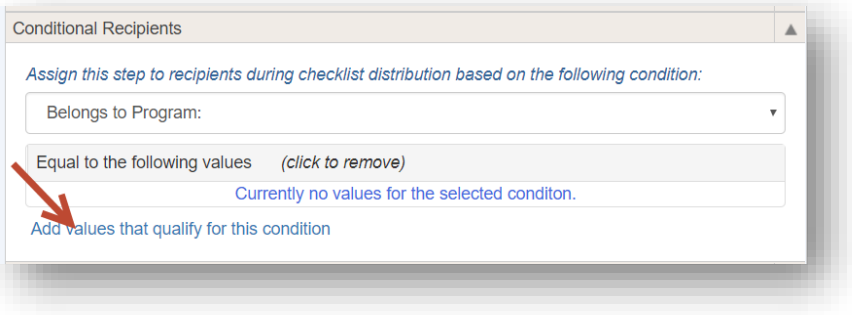
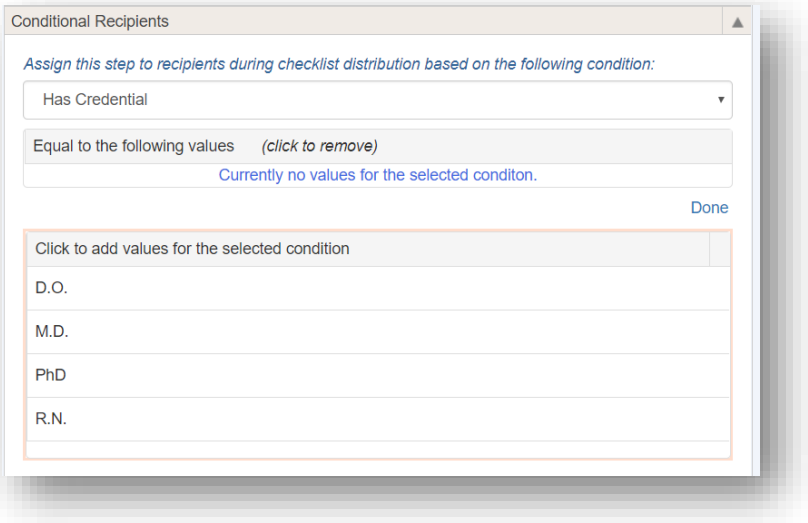


4. Click all relevant values to add them to this condition
5. Click **Done**. This step will only be available to recipients who meet this criteria.



DEPENDENT STEPS

Use this option to cancel other steps if the step specified here is completed. For example, you might have steps for insurance benefits that allow the recipient to confirm one option: Family Coverage, Single Coverage or Waive Coverage. When the recipient chooses one step, the other steps indicated in this option will be disabled.

1. Click on a specific step
2. Click **Dependent Steps**
3. Choose the steps that will no longer be required if the current step is completed
4. Click **Add**

The steps that you added will be disabled once the current step is chosen.

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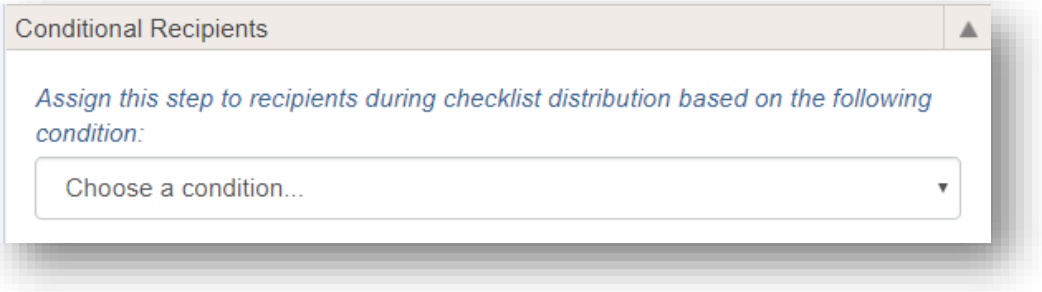
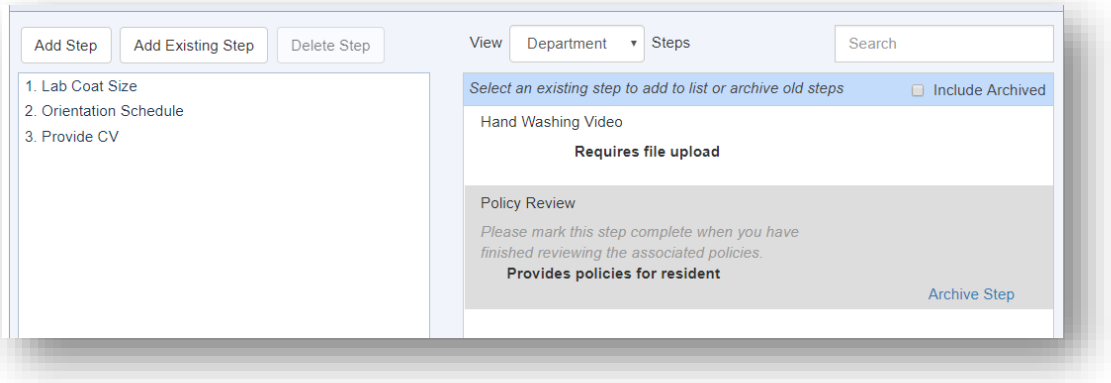


In the example given above for insurance benefits, the Conditional Recipients settings would need to be configured on all three steps: Family, Single and Waive Coverage.

ADD EXISTING STEPS

Steps that have been used on previous checklists can be used again. Also, steps created by other departments can be used on your checklist. However, there is a limit as to what can be changed on these steps. Sometimes it's best to make a copy of the step and make changes to the new step, leaving the former step intact.

1. Click **Add Existing Step**
2. Select one of your existing steps from the list on the right. Click *Department > All* to view a list of steps from all departments.



3a. Options when selecting one of your own existing steps:

a. Click **View/Edit Step** to make permanent changes to this step everywhere it is used, even to checklists in the past
b. Click **Copy and make new step** to keep the existing step intact and make a new step with changes

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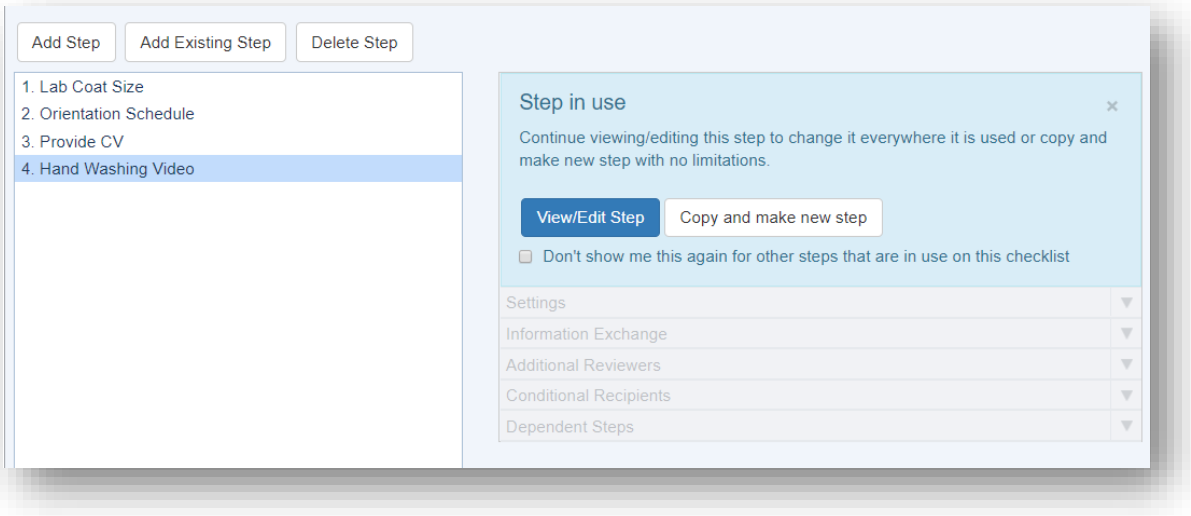
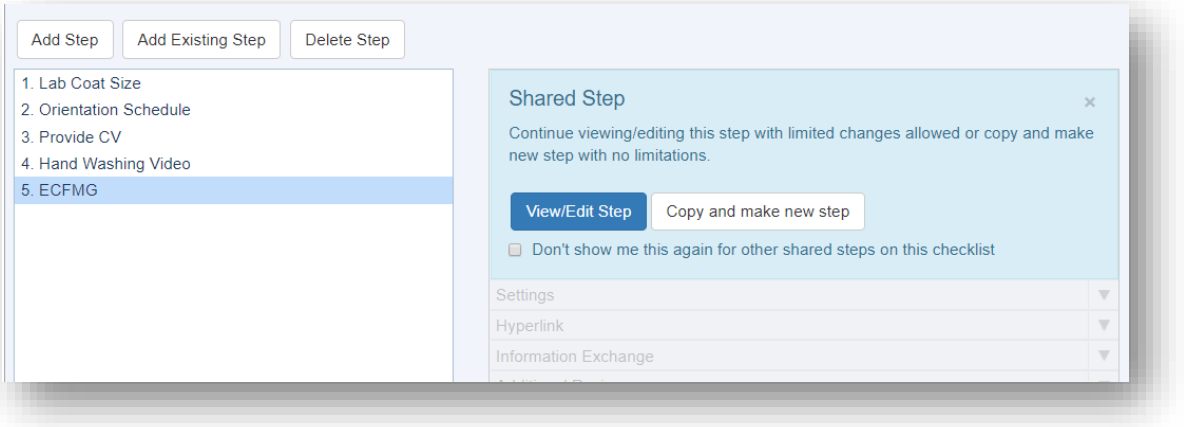


3b. Options when selecting an existing step from another department called a 'Shared Step:'

a. Click **View/Edit Step** to make limited changes to this step
b. Click **Copy and make new step** to keep the existing step intact and make a new step with unlimited changes



Note: Once you click on the **View/Edit Step** button on a Shared Step from another department, click the arrow (under 'Close') to view the 'allowed' changes.

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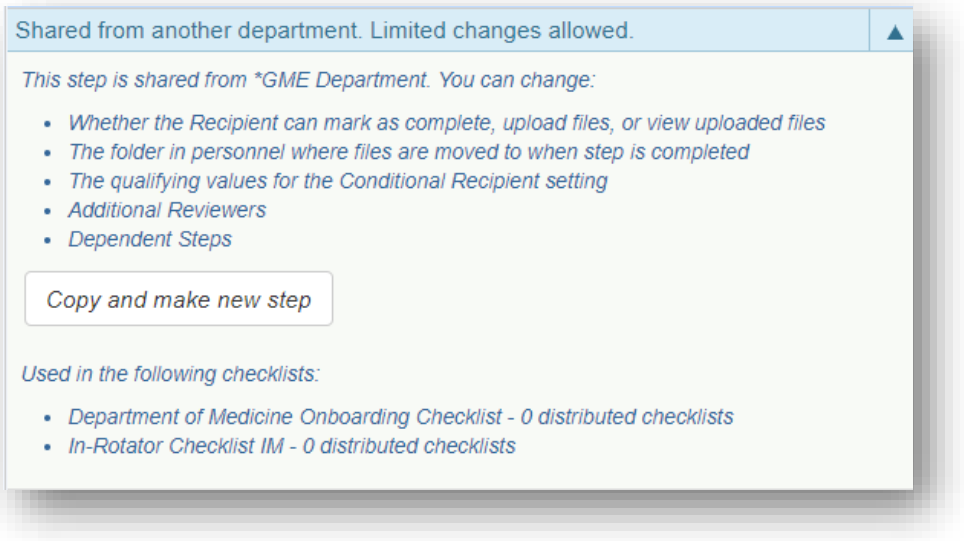

DISTRIBUTE NOTIFICATIONS

Once your checklist is complete and ready to send to recipients, you can set up notifications. You can configure email notifications to go to recipients when their checklists are available, when their checklists are complete, and when and if they become overdue. You can also set up administrative emails that detail how recipients are progressing with their Rotation tasks. Notifications are sent in the daily consolidated email. There are five types of email notifications:

- Initial: Sent to recipients the day after a checklist is distributed to them
- Reminder: Sent to recipients with incomplete steps remaining on their checklist
- Complete: Sent to recipients the day after all checklist steps are completed
- Administrative: Sent to the people whose names are designated in the Program Personnel section in Administration for the following roles:
    - Program Coordinator
    - Program Director
    - Associate PD
    - Program Chair
- Pending: Sent to designated administrators and additional reviewers when steps are pending review. Click a link to go to the Steps section of the Checklist.

Notifications are set up once and then may be used for different types of checklists.

SET UP

1. Go to **Personnel** > *Checklists* > *Rotation*
2. Click **Notifications**
3. Click **Add Notification**
4. Enter a name for the notification

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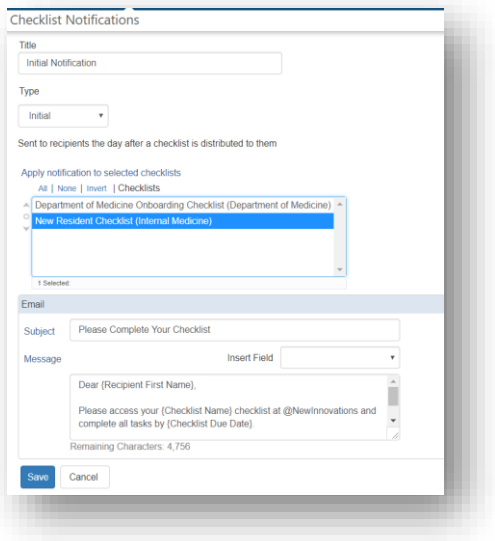
Initial Email

5. Select the type of notification: **Initial**
6. Select all checklists this email applies to. The list contains checklists from departments where you have privileges in Personnel.



7. A default 'Subject' is supplied. Change, if necessary
8. A default 'Message' is supplied, Change, if necessary
9. You can insert fields into the body of the message using the tokens from the dropdown list on the right to personalize your emails, including:
    - Recipient Name, First Name or Last Name
    - Program Name
    - Program Start Date
    - Coordinator Name
    - Coordinator Email
    - Checklist Name
    - Checklist Due Date
    - Institution Login
10. Click **Save**

Reminder Email

Follow steps 1 – 4 from above

5. Select the type of notification: **Reminder**
6. Select all checklists that this email applies to. The list contains checklists from departments where you have privileges in Personnel.
7. Send options:
    a. Send a reminder X number of days prior to the due date
    b. Send the reminder at regular intervals
8. CC Options:
    a. Program Coordinator

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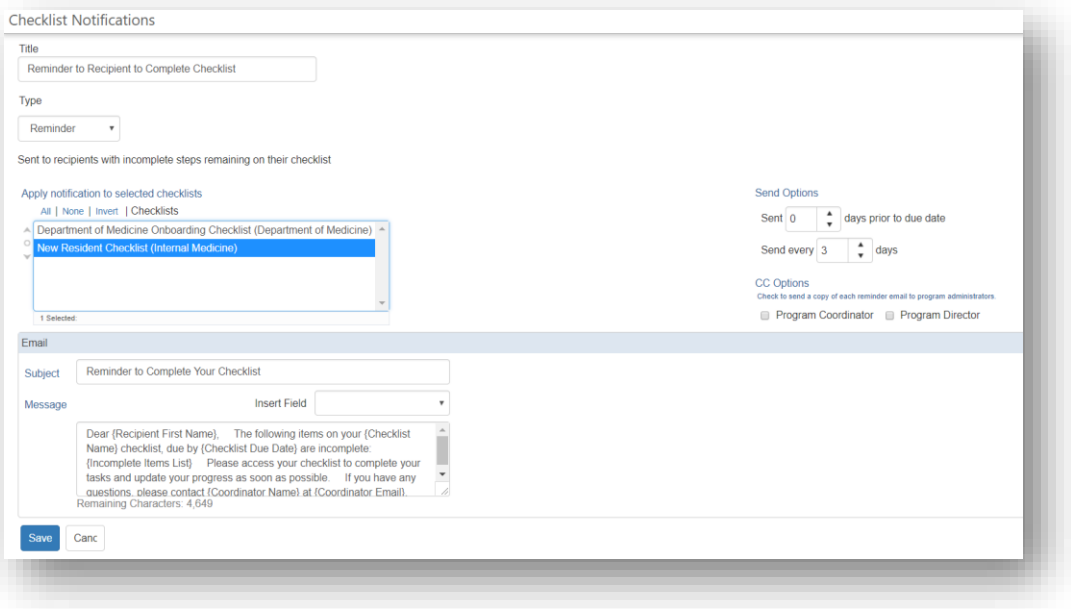
b. Program Director

9. A default Subject is provided. Change, if necessary
10. A default Message is provided. Change, if necessary.
11. Incomplete steps are provided for the recipient
12. You can insert fields into the body of the message using the tokens from the dropdown list on the right to personalize your email
13. Click **Save**



Complete Email

Follow steps 1 – 4 for Set Up

5. Select the type of notification: **Complete**
6. Select all checklists that this email applies to. The list contains checklists from departments where you have privileges in Personnel.
7. Enter the body of the message
8. You can insert fields into the body of the message using the tokens from the dropdown list on the right to personalize your emails
9. Click **Save**

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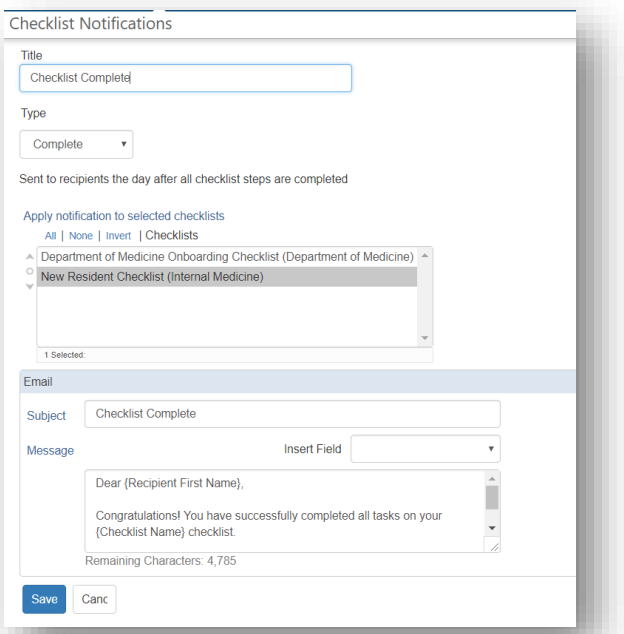

Administrative Email

Follow steps 1 – 4 for Set Up

5. Select the type of notification: **Administrative**
6. Select all checklists that this email applies to. The list contains checklists from departments where you have privileges in Personnel.
7. Duration
    a. Daily summaries are sent when there are active (not archived) checklists for people in your department
    b. Daily summaries are sent during a certain date range
        i. When this radio button is selected, enter the start and end date of the duration
8. Select email recipients
    a. Administrators
    b. Include recipients: Program Coordinator, Program Director, Associate Program Director, and/or Program Chair. These people are dynamically identified in Program Demographics (*Main > Administration > Global Setup > Programs*)
    c. Additional email addresses: Send emails to people who are not one of the above
9. Click **Save**

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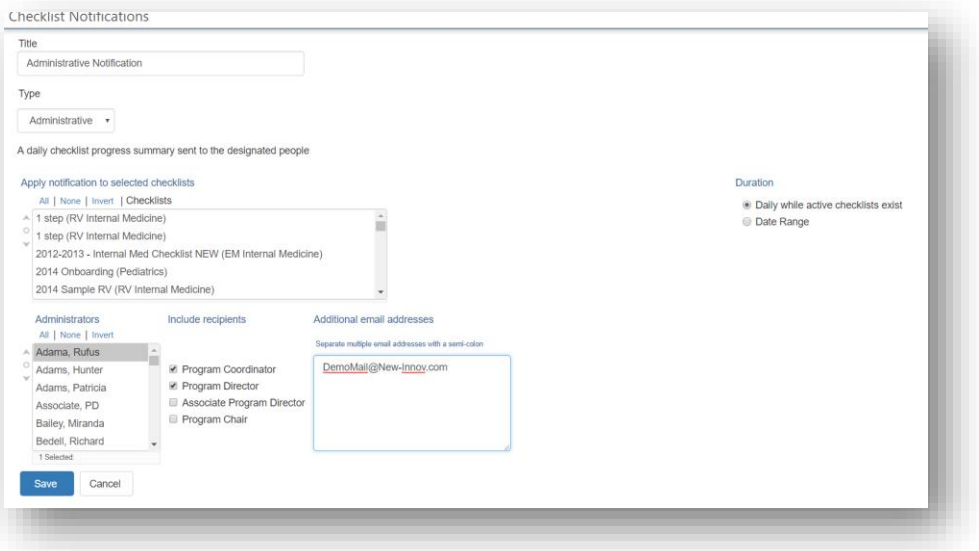
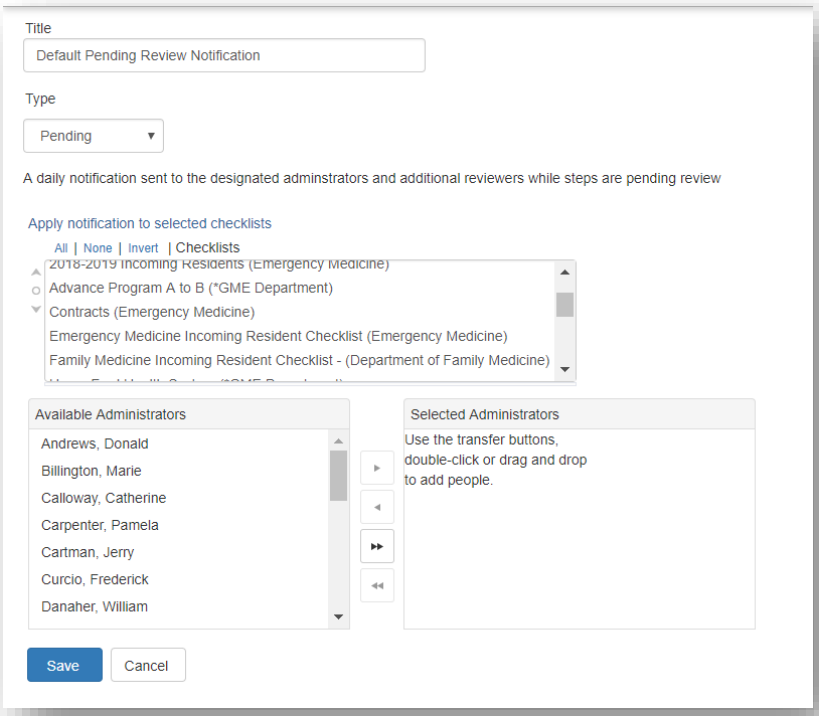


Pending

Follow steps 1 – 4 for Set Up

5. Select the type of notification: **Pending**
6. Select the checklist
7. Select Administrators by moving their names to the 'Selected Administrators' box on the right.
8. Click **Save**
9. The notification contains links to pending items for your review.



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DISTRIBUTE CHECKLISTS

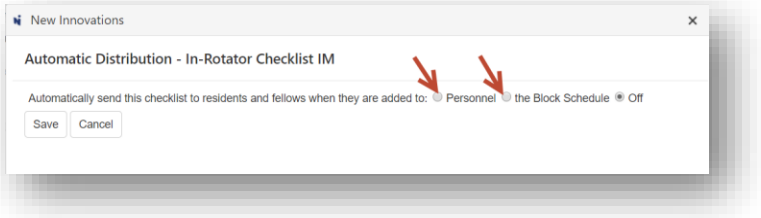
CHECKLIST DISTRIBUTION – AUTOMATIC OR MANUAL?

You can choose to send your checklists out automatically after you add visiting recipient and fellow records to the database or you can distribute them at a later date.

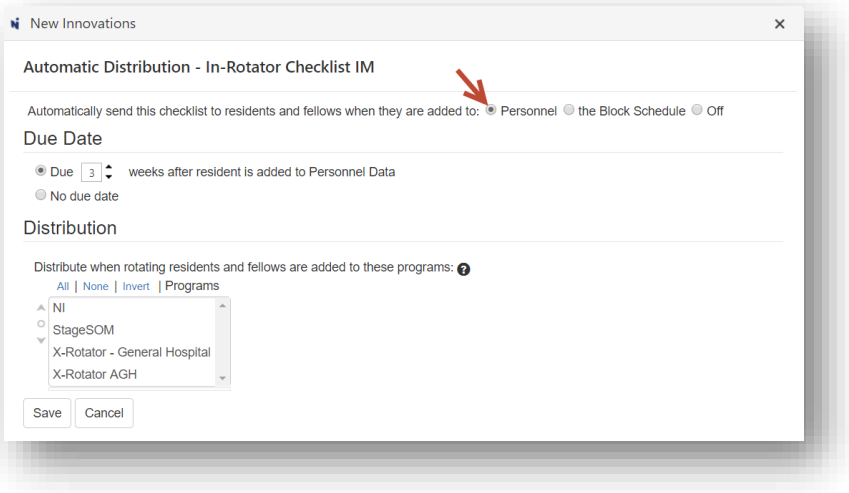
- Use Automatic if you are building your checklists prior to adding recipients to Personnel or to the Block Schedule.
- Use Manual to control when the checklist is distributed

AUTOMATIC DISTRIBUTION

1. Go to *Personnel > Checklists > Rotation*
2. Click **Checklists**
3. Select a checklist
4. Click **Automatic**
5. Choose to have the checklist distributed when the recipient is entered in Personnel or when scheduled on a rotation on the Block Schedule



ROTATION PROFILE ENTERED IN PERSONNEL



1. Select the due date
   - Due a selected number of weeks after the recipient's profile is added to Personnel

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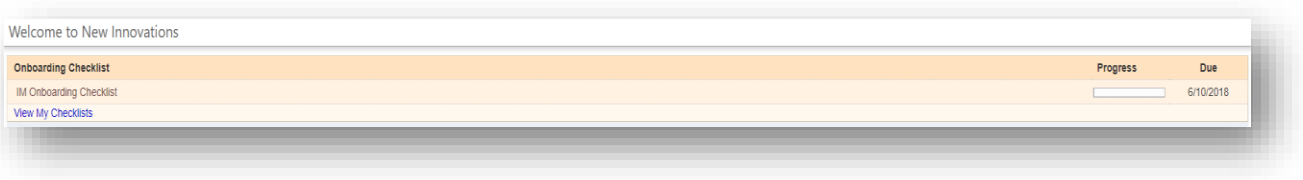
- No Due date

2. Select the program – only Rotator programs are available to select
3. **Save**

When Visiting Recipients or Fellows are entered in Personnel, the Checklist will be available on their Home Page



ROTATION ADDED TO THE BLOCK SCHEDULE

1. Select the Block Schedule radio button to have the checklist available to the recipient when his or her name is added to Block Schedule

1. Set the due date either before or after the scheduled rotation start date
    - Due a selected number of weeks before or after the rotation start date
    - No Due date
2. Choose the number of weeks prior to the recipient's rotations start date in the Program to distribute the Checklist
3. Select the programs. Only principal programs are available to choose.
4. Distribution options
    - Any time they are on a rotation
    - The first time they are on the scheduled rotation. Sometimes recipients will rotate to your hospital for the same rotation more than once. This option prevents the person from getting the same checklist every time they are on the rotation selected in the configuration.
    - Not the first time but every subsequent time they are on a rotation. This option might be used to send the recipient a checklist to update information in their Personnel record.
    - If recipient as already completed this checklist in the past X months, do not distribute another. Enter the number of weeks in between distribution.
5. Place on hold if necessary to review the checklist before it's distributed.
6. Click **Save**

When the visiting recipients and fellow records are added to the software, they will have a checklist assigned to them and will receive an email notification the next day (if an initial email is configured).

MANUAL CHECKLIST DISTRIBUTION

Manual distribution requires that the:

- Recipient's profile is entered in a non-principal Rotator Program
- Recipient must be scheduled on a rotation that belongs to a principal program in your institution

1. Go to *Personnel > Checklists > Rotation*

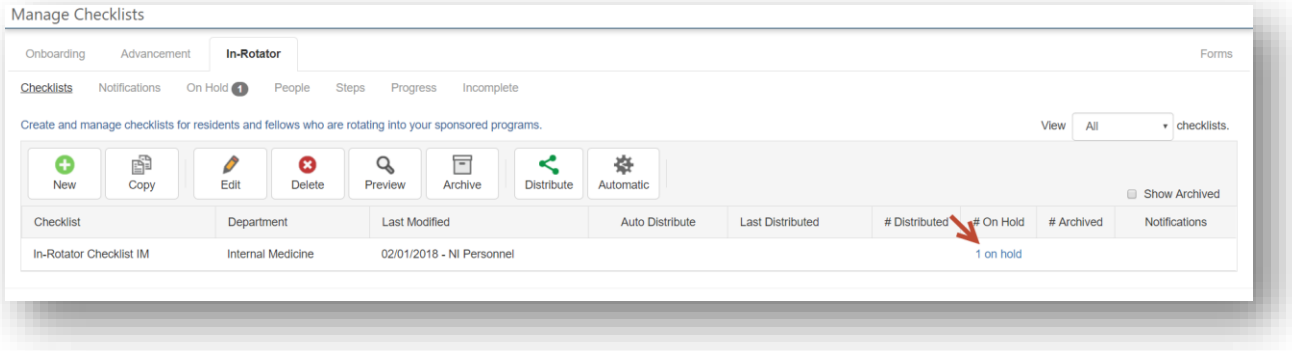
2. Highlight the checklist
3. Click **Manual Distribution**

4. Set the due date preferences for this checklist
    a. Due a selected number of weeks before or after the program start date
    b. Due on a specified date
    c. No Due date
5. Select the program where the checklist will be distributed
6. Highlight the names in the list to receive the checklist
7. Click **Distribute**

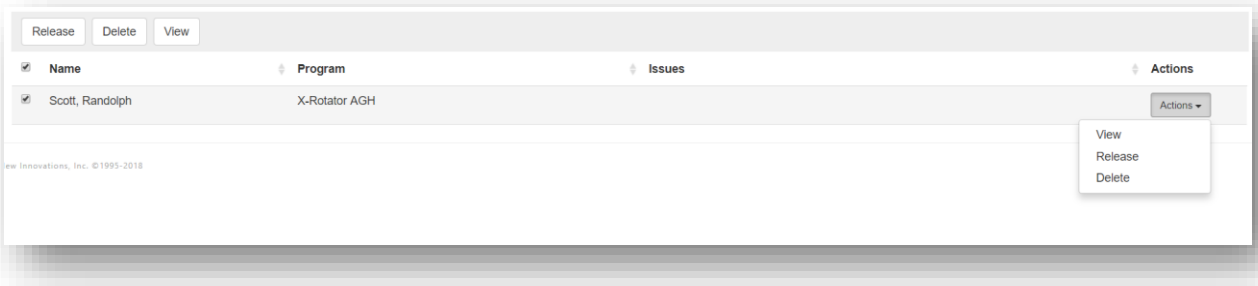
If you have configured an initial email, it will be sent to recipients the next day, unless the checklist is on hold. Then the email will go the day after it is released.

RELEASE CHECKLISTS ON HOLD FOR REVIEW

1. Go to *Personnel > Checklists > Rotation*
2. Click **Checklists**
3. Click the link to access people whose checklists are on hold



4. Click the checklist that you want to distribute



5. Click **Release**

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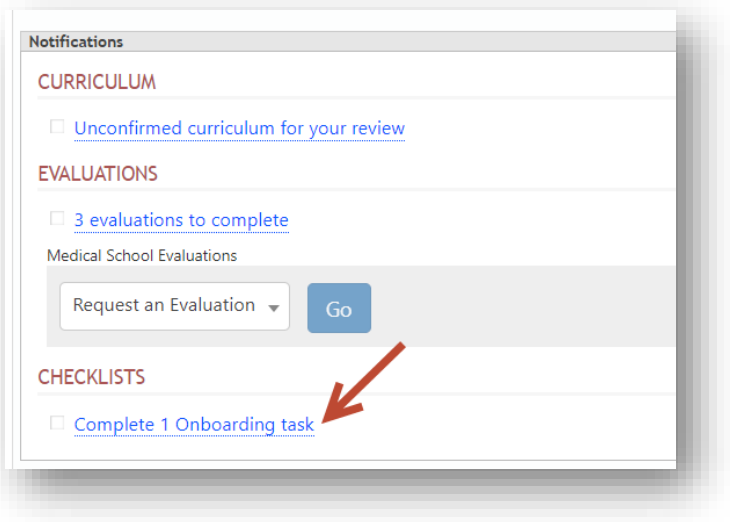
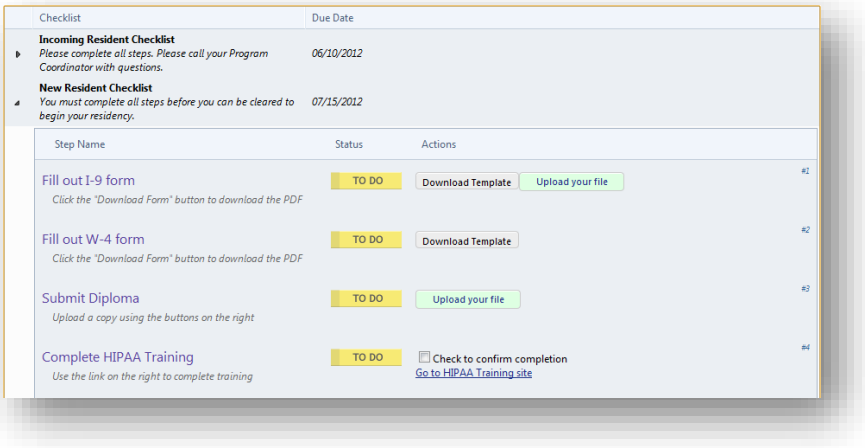
WHAT DO VISITING RECIPIENTS AND FELLOWS SEE?

When the Visiting recipients and fellows log in to New Innovations to complete their checklists, they will see the checklist in the Notifications panel



They can click the link to access their checklists.



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MANAGE CHECKLISTS

Once you have distributed your checklists, you can get detailed information about progress by using the management pages in the Rotation area. Go to *Personnel > Checklists > Rotation* and click the appropriate tab.

CHECKLISTS TAB

There are a series of buttons on the Checklist tab to help you manage your checklists.

Go to *Personnel > Rotation > Checklists tab*

Copy - You have the ability to copy a checklist to your own program or to another department.

1. Select the checklist you want to copy
2. Click the **Copy** icon
3. Enter a name for the copied checklist. This cannot be the same name as the original.
4. Select the Department. Your own department will be selected by default.
5. Select the type of checklist: Onboarding, Advancement or Rotation
6. Click **Copy**

Edit

1. Select the checklist you want to edit
2. Click the **Edit** icon
3. Select a step
4. Make necessary additions or changes
5. Click **Done**

Delete

1. Select the checklist you want to delete. Note: You cannot delete a checklist in use.
2. Click the **Delete** icon
3. You will be prompted by the system to make sure you want to delete the checklist
4. Click **OK**

Preview - View your checklist to see how it will appear to your recipients.

1. Select your checklist
2. Click **Preview**
3. Click '**X**' to close

Archive

1. Click the **Checklists** tab
2. Select the checklist you want to archive
3. Click the **Archive** icon
4. The pop-up box will display the following question: 'Would you also like to archive all distributed checklists?' Select one of the following:
    a. Yes, archive them all

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b. No thanks
c. Cancel

Notes:

- To view the archived checklist, check the box for **Show Archived**
- To unarchive a checklist, check the box for **Show Archived**, select the checklist and click the **Unarchive** icon

Archive multiple recipients' checklists

1. Go to *Personnel > Checklists > Rotation*
2. Click the file box beside the number in the '# Distributed' column
3. Click **OK**

ON HOLD TAB

Release Checklists that are 'On Hold' for review. If Initial emails have been configured, they will be sent to the recipients the following day notifying them that they have a checklist to complete.

1. Go to *Personnel > Checklists > Rotation*
2. Click **On Hold**. (The number shows how many checklists are 'On Hold')
3. Select the checklist from the dropdown list
4. Options:
    a. For an individual person, click **Actions**, then **View**, **Release** or **Delete**
    a. For multiple people, check the boxes, then click the **Release**, **Delete** or **View** button

PEOPLE TAB

You can select individual recipients and check their progress completing their tasks.

On this page, you can:

- View overall progress
- Review submitted documents and forms
- Delete incorrect documents that have been submitted
- Mark steps complete
- Make a step required or not required
- Delete checklists for individuals
- Waive a checklist for a person to suspend work on it

Filters Available:

- Check the following boxes to view the steps in various stages of completion: **Completed**, **Incomplete** or **Pending**

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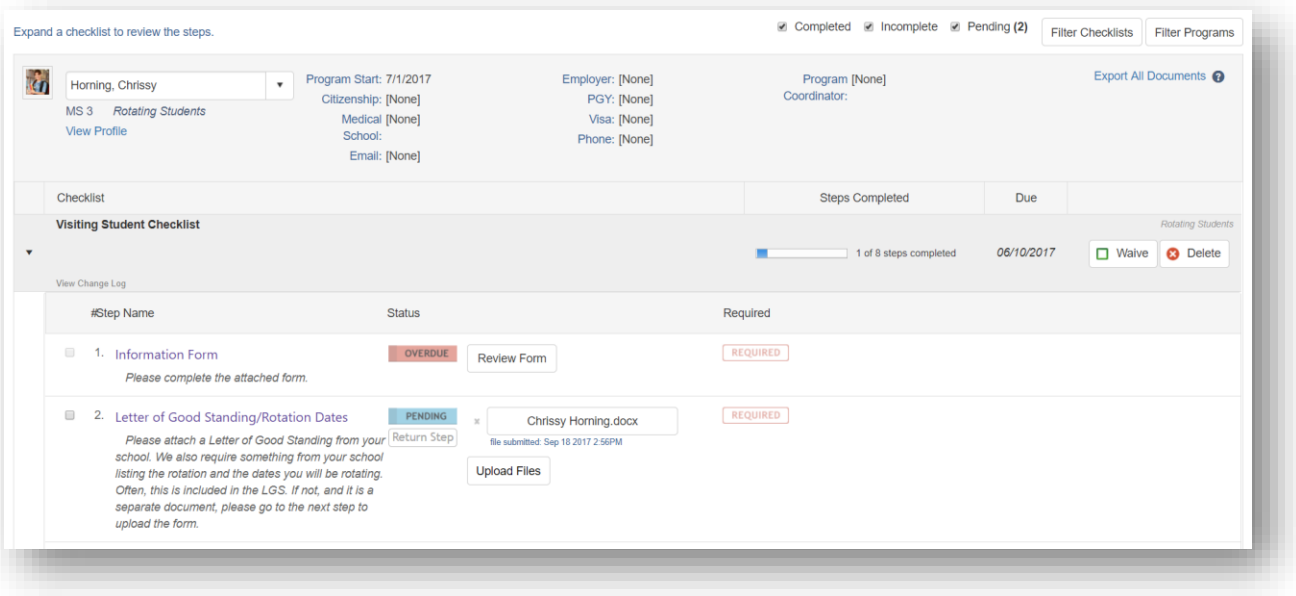
- Click **Filter Checklist** to limit results by a certain checklist
- Click **Filter Programs** to limit who you see by program



Status Column:

- Pending: A document or form has been submitted for administrator review.
- To Do: The recipient has yet to complete this task
- Complete: The recipient or administrator has completed this task
- Overdue: The checklist due date has passed and the step is not complete

Actions:

- Waive a checklist: This option marks the checklist 'complete' and removes it from the recipient's queue.
- Delete: Deletes the checklist from the person's queue.
- Export all Documents**:** Export documents this person has uploaded into a .pdf file.

Manage 'Pending' Documents

If you have added steps to your checklist that require recipients to upload documents and you've not allowed recipients to mark the step 'Complete,' those steps will require your approval. These steps will be in 'Pending' status until they are approved. You will also need to approve all forms submitted, since recipients are not permitted to mark them complete. Access the Pending items by person or by step to review the documents and mark the steps complete.

1. Go to *Personnel > Checklists > Rotation > People tab*
2. Select an individual with a pending icon next to their name

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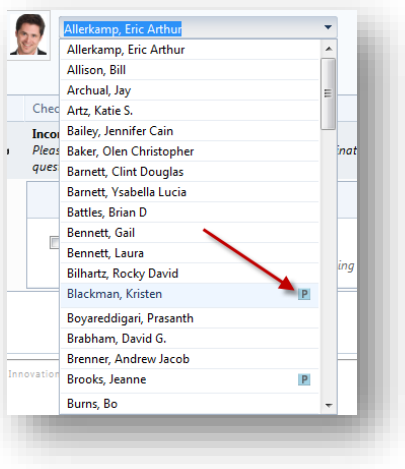
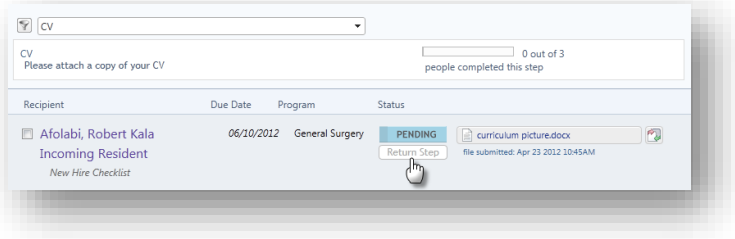
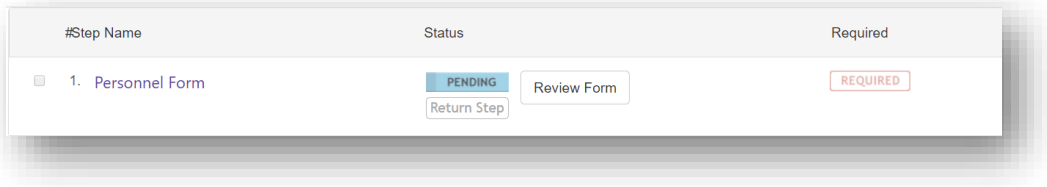


3. Click the file to open and review it.
    a. Check the box to approve it.
    b. If a recipient has submitted the wrong document, click the 'X' in front of the document to delete it.
    c. Click **Return Step** to send it back to the recipient. Add a note in the text box provided to explain why it is being returned.



Approving Forms

1. Go to *Personnel > Checklists > Rotation > People tab*
2. Select an individual with a Pending icon next to their name
3. Click **Review Form** to open and review it



4. After reviewing the information:
    a. Click **Commit** to transfer this information from the Form to the recipient's Personnel record. The step will then be marked as 'Complete.'
    b. Click **Save and Close** to save your changes but not submit them just yet
    c. Click Cancel to return to the previous screen
5. Click **Return Step** to send the step back to the recipient. Enter a reason in the text box provided for returning it

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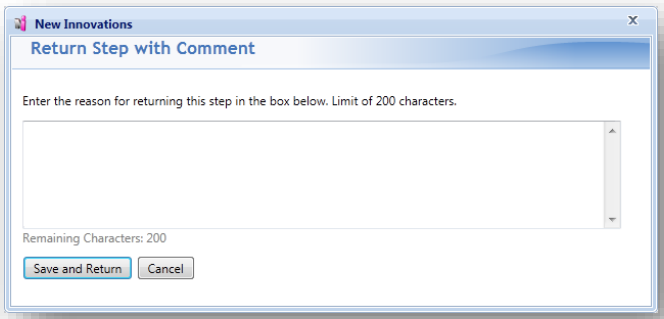
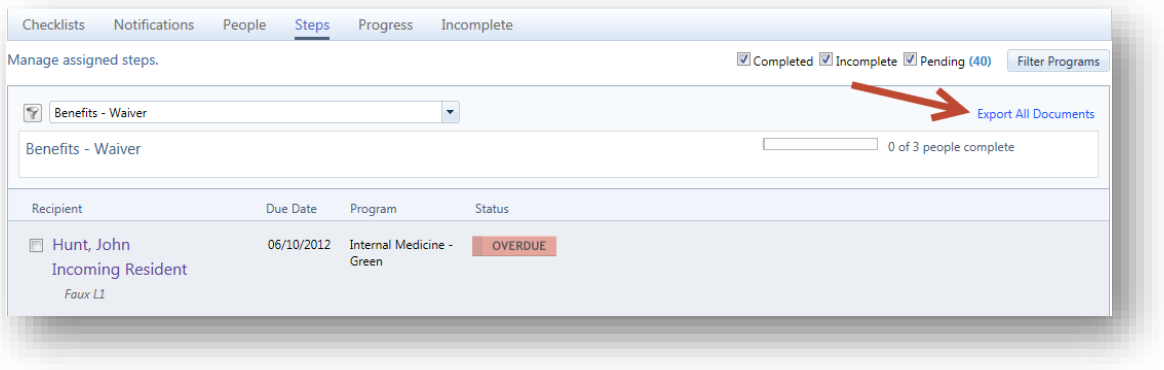


Bulk Printing

On the People and Steps tabs, you're able to print multiple documents at one time. The documents are exported into PDF format which can then be printed. For example:

1. Go to *Personnel > Rotation*
2. Click the **Steps** tab
3. Select a step
4. Click **Export All Documents**
5. Select one:
    a. Click **Open** to open the PDF document
    b. Click **Save** to save the PDF document to your computer
6. The PDF document can then be printed



STEPS TAB

You can review progress by an individual step on the Steps tab. You can narrow the list of steps you see to steps from certain checklists by clicking the filter icon to the left of the dropdown list.

Click **Filter Programs** to limit what you see by program. Use the view checkboxes to see steps that are completed, incomplete, or pending administrative review. The number following 'Pending' indicates how many items are pending administrative review.

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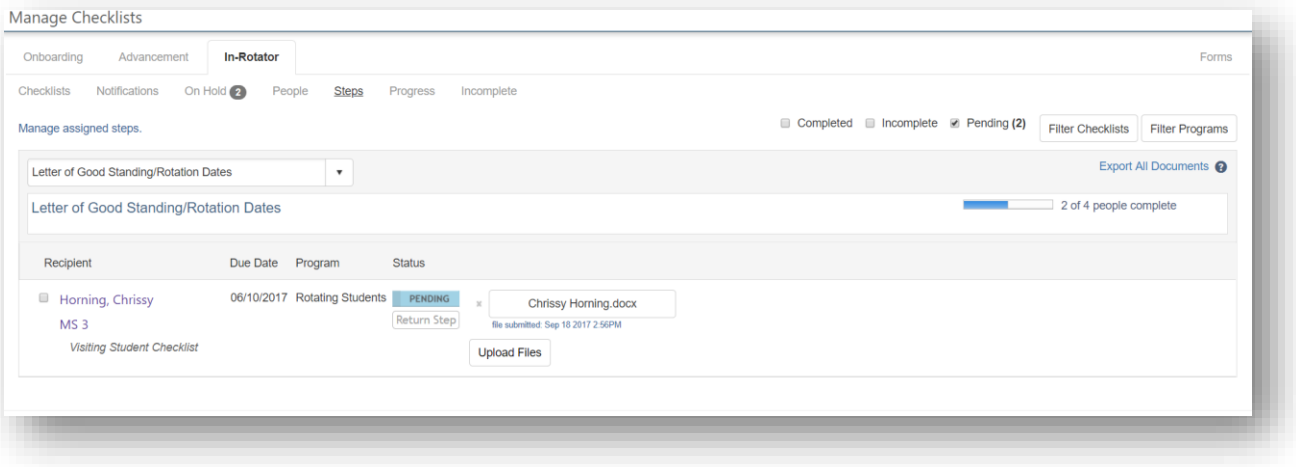
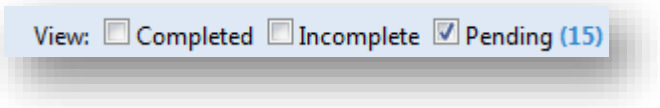


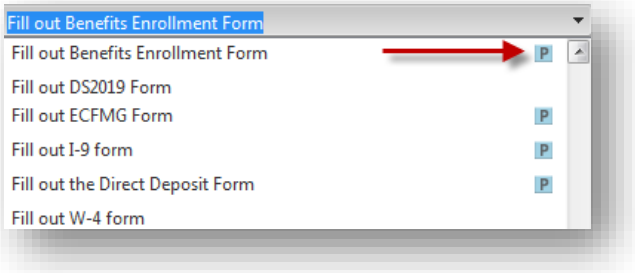
Manage 'Pending' Documents

If you have added steps to your checklist that require recipients to upload documents and you've not allowed recipients to mark the step 'Complete,' those steps will require your approval. These steps will be in 'Pending' status until they are approved. You will also need to approve all forms submitted, since recipients are not permitted to mark them complete. Access the Pending items by step to review the documents and mark the steps complete.

1. Go to *Personnel > Checklists > Rotation > Steps tab*
2. Uncheck **Completed** and **Incomplete** so that only **Pending** steps will show up on the page



3. Select a step with a 'Pending' icon from the dropdown list.



4. A list of people who have submitted this step for approval will appear.
5. Click the file to open and review it.
    a. Check the box to approve it. The documents are then stored in the Files & Notes tab in the recipient's Personnel file
    b. If a recipient has submitted the wrong document, click the 'X' in front of the document to delete it.
    c. Click **Return Step** to send it back to the recipient. Add a note in the text box provided to explain why it is being returned.

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6. Click **Export All Documents** to print the documents

Approving Forms

1. Go to *Personnel > Checklists > Rotation > Steps tab*
2. Select a Form step with a Pending icon
3. Click **Review Form** to open it and review the data
4. Options:
   - Click **Commit** to transfer this information from the form to the recipient's Personnel record. The step will be marked as 'Complete.'
   - Click **Save and Close** to save your changes but not submit them just yet
   - Click **Cancel** to return to the previous screen
5. Check the box to approve the submission or click **Return Step** to send it back to the recipient. Add a note to explain

Information committed to a person's Personnel file will overwrite existing data.

PROGRESS TAB

Use the Progress Tab to see a summary of how everyone is progressing on their checklists. Select the Checklist from the dropdown list to get a list of recipients and a count of how many steps have been completed.

You can take the following actions on this page:

- View the overall summary of progress for each checklist you have distributed
  - Select **View by People** or **View by Step**
- Click a person's name to access his or her checklist
- Click and drag to select multiple rows
- Check the box and select one of the following actions:
  - Click **Delete** to get rid of selected checklists
  - Click **Archive** or **Unarchive** a checklist for a person
  - Click **Update Due Dates** to change the due dates for selected checklists
  - Click **Sync to Advance** to advance a person's status if they have not completed a checklist that requires completion to advance
  - Select a type of email to send to people with selected checklists:
    - Initial: Sends the initial email you have configured for this checklist
    - Reminder: Sends the reminder email you have configured for this checklist
    - Completion: Sends the completion notice that you have configured for this checklist
    - Custom: Opens an email from your email program so that you can create a custom message and send it

Notes:

- To view the archived checklists, check the Archived box in the View filters.
- An entire checklist can be archived on the Checklist tab

View by Steps:

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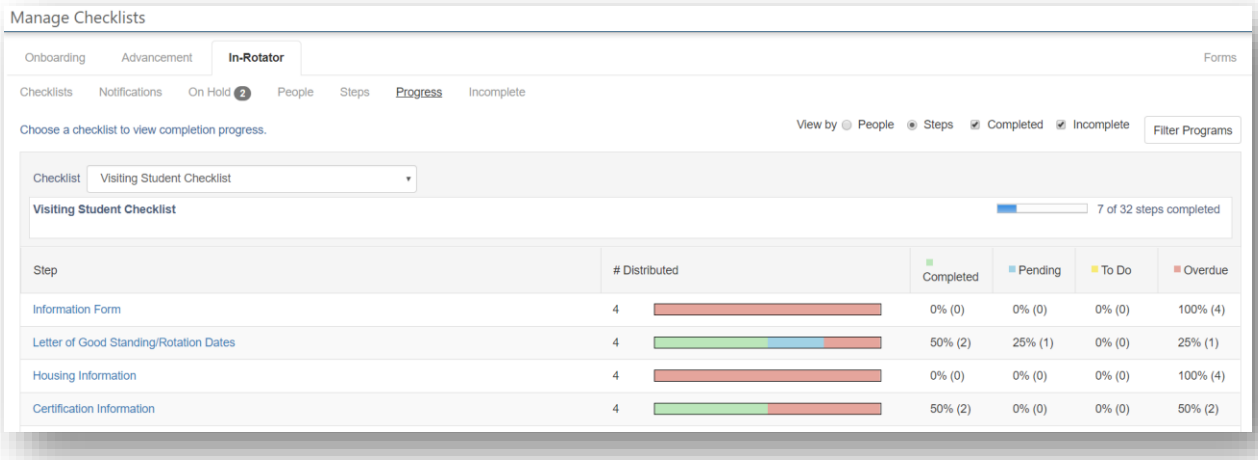
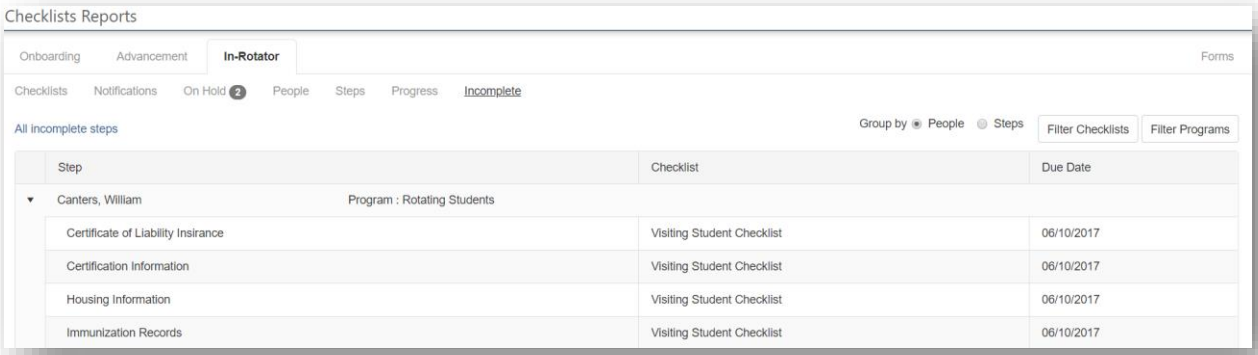


INCOMPLETE TAB

You can click the **Incomplete** tab to see a list of steps that have not been done by your recipients. This includes steps from all *Rotation* checklist types. You can either group the list by person or by step:



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APPENDIX **A** – ACCESS TO CHECKLISTS

GME ADMINISTRATORS – LEVEL 6 ACCESS

Administrators who oversee other programs and have **Level 6** privileges in Personnel can:

- Create, edit, view any checklists in any department
- Supply blank documents for any visiting recipient or fellow
- Create and attach forms to checklists
- View progress and steps for all checklist recipients in all programs
- Approve all submitted documents
- Approve data collected in forms and send it to recipients' Personnel records
- Mark any step complete

GME AND PROGRAM ADMINISTRATORS - LEVEL 5 ACCESS

Administrators who are responsible for specific programs should have **Level 5** privileges in Personnel so that they can:

- Create, edit, view any checklists created in departments they have access to
- Supply blank documents for recipients
- Create and attach Forms to checklists
- View progress and steps for all recipients in programs they have access to
- Approve documents submitted by recipients in their program
- Approve data collected in Forms and send it to recipients' Personnel records, provided they are not prevented from doing so by customized security
- Mark steps complete for people in programs they have access to

ADMINISTRATORS - LEVEL 4 ACCESS

People with **Level 4** access can view checklists assigned to people in their departments and monitor their progress.

ADDITIONAL REVIEWERS – LEVEL 1 ACCESS

Reviewers are people who are given very specific access to certain steps on a checklist. You can identify certain people who are responsible for specific steps. For example, your human resources administrators may collect benefits enrollment forms. You could create a review group for them and assign the step 'Submit benefits enrollment forms' to them. Then when they log into New Innovations and access checklists, they will only see the benefit enrollment form steps they are responsible for and no other steps.

Reviewers need to have **Level 1 access or higher** in Personnel so that they can:

- Review and approve specific materials submitted for steps they have access to

RECIPIENTS AND FELLOWS

Visiting Recipients must meet the following conditions to be able to receive on *Rotation* Checklist:

- Profile entered in a Rotating Recipient Non-Principal Program
- On the Block Schedule on a rotation from a Principal Program from your institution

Recipients and Fellows do not need special privileges in Personnel to complete a checklist, but they do need privileges in at least one module to be able to access the software. You may want to consider giving them at least **Level 1** access so that they can view their own Personnel record.

Visiting Recipients and Fellows can:

- View documents and websites
- Submit documents
- Complete Forms
- Mark steps as 'Complete'

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