

Administration Module

Task	Purpose
Enter Program Director and Associate Program Director names in Program Demographics <i>Program > Personnel</i>	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: <ul style="list-style-type: none"> • Included in accreditation statistics (CLER) like attrition reporting in Key Metrics • Grouped as Core Faculty, Department Faculty, or Outside Faculty in the Evaluation Reports
Check for a new Academic Year <i>Software Setup > under Local Setup: Academic Year</i>	The academic year is an integral piece of the software because it is used to define specific time periods for: <ul style="list-style-type: none"> • Block schedule intervals • Assignment schedule intervals • Evaluation distribution • Duty hour rule checking • Finance applications

Personnel Module	
Task	Purpose
Import matched residents from ERAS <i>Personnel > under Tools > Import ERAS data</i>	The ERAS import creates a profile for each new resident and adds valuable information to the profile
Request that MMCGME Manually add trainees outside of ERAS into New Innovations	If you don't use ERAS to import new residents, or you only have a few fellows, you can request that they are added manually.
Request that MMCGME add records, including email addresses for new faculty	Keep faculty members' records up to date so they can be matched for evaluations, act as supervisors for procedures or as an advisor to learners.
Request that MMCGME archive profiles for people who are no longer in your program	Get rid of data that is no longer relevant. This helps to speed up your database
Create Onboarding Checklists for new trainees and Advancement Checklists for trainees moving up in your program	Onboarding checklists help you collect information and documents for new trainees, such as tax forms, transcripts, licenses, benefits. Advancement checklists collect info from trainees or faculty: <ul style="list-style-type: none"> • Advancing to the next year • Graduating • Becoming Faculty
Check for necessary data in Personnel, such as IRIS (for trainees) and emergency contacts <i>Personnel > Personnel Records</i>	Certain information may be required by your institution for reporting

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

Block Scheduling Module	
Task	Purpose
Check Rotation names. Request any new rotations from MMCGME. <i>Setup > Rotation Names</i>	Make sure new rotations are added and unused ones are archived
Set Rotation Favorites <i>Setup > Go to Rotation Favorites</i>	Make sure all rotations that you use on a regular basis are on the 'Favorites' list
Check Rotation Requirements <i>Setup > Rotation Requirements</i>	Rotation Requirements track how rotations are assigned over a trainee's program
Revise and replace curriculum <i>Curriculum > Edit</i>	Share current goals and objectives with trainees
Load and assign curriculum <i>Curriculum > New</i>	Load and assign curriculum Curriculum > New
Archive outdated curriculum Curriculum > Archive	Removes access to obsolete curriculum documents

Evaluations Module

Task	Purpose
Convert any old forms to new format <i>Evaluation Forms>Actions>Copy to a new form</i>	Gets old forms updated and available for mobile evals
Link tags and core competencies <i>Evaluations > Evaluation Forms</i>	Provides continuity in reporting for Evaluations, Milestone Reviews and Portfolio Reviews
Map evaluation questions to Milestone Reviews <i>Evaluations > Setup > Milestones</i>	View evaluation results by competency and subcompetency in Milestone Reviews
Update evals, mapping and tagging if your specialty's Milestones have changed	Keep in sync with your specialty and ensure relevant eval data reaches the CCC Milestone Review.
Update evaluation forms as needed <i>Evaluations > Evaluation Forms</i>	Capture correct data for evaluation reporting
Create and update Program Evaluation Forms for use in Program Evaluations <i>Evaluations>Program Evaluation Forms</i>	Ensure program evaluations can be completed and reported
Archive Evaluation Forms not in use <i>Evaluations>Evaluation Forms>Actions> Archive</i>	Prevents selecting obsolete forms when creating sessions
Updated forms should be added to new sessions before matching <i>Evaluations > Session Manager</i>	Ensure that the session will use the right form when matching up subjects and evaluators
Create sessions for program evaluations <i>Session Manager > Add New Session</i>	Provide method for residents, fellows and faculty to evaluate their program
Add manual matches to those sessions that do not match automatically <i>Session Manager>Match Schedule</i>	Add matches to sessions like Peer Evaluations, Self Evaluations and 360 Evaluations.
Copy sessions to next academic year <i>Session Manager</i>	Provide continuous distribution of evaluations. <ul style="list-style-type: none"> • Configure Auto Copy for sessions that use the same interval configuration each year. • Manually copy sessions one at a time for sessions where the intervals will be different next year

Work Hours Module	
Task	Purpose
Check Work Hours Basic Configuration Confirm all Duty Types or Assignment Definitions are available to the residents for logging <ul style="list-style-type: none"> • Make sure the start day of the week is correct • Check vacation configurations <i>Setup > Basic Configuration</i>	Confirm that the Duty Hours module is set up according to your program's needs
Check Duty Hour rule configuration <i>Setup > Rule Configuration</i>	Review of the rules before the academic year might help prevent violations
Review notifications <i>Setup>Notifications</i>	Personnel may have changed in your program. Make sure the right people are receiving alerts

Logger Module	
Task	Purpose
Verify that procedures and diagnoses lists are current Archive procedures not used anymore <i>Setup > Lists & Fields</i>	Trainees need current, accurate lists to log procedures
Check Supervision and Privilege targets to keep them current.	So, you can monitor learner progress along the correct track
Check other options available such as: <ul style="list-style-type: none"> • Locations • Visit Types • Roles • Supervisors • Patient Types <i>Logger>Lists and Fields</i>	

Conferences Module	
Task	Purpose
Copy your conferences after your block schedule is finished <i>Manage Conferences>Copy</i>	Provide an accurate and continuous calendar of educational conferences <ul style="list-style-type: none"> • Notify attendees and speakers with email alerts • Offer feedback with conference surveys
Update or create new survey forms <i>Surveys>Forms</i>	Ensure forms reflect current needs
Check QR codes <i>Setup>Rooms</i>	Update room list in Conferences to make sure all rooms are added to Conferences
Check forms and distribute conference surveys	Offer method for attendees to provide feedback on conferences

Portfolio Module	
Task	Purpose
Create new Scholarly Activity forms <i>Setup > Scholarly Activity > Forms</i>	Keep forms updated with your current program standards. <ul style="list-style-type: none"> • Add new Forms or archive those no longer used • Confirm the correct ADS categories are added to the forms
Create Journal Assignments <i>Journals>Manage Journals>New</i>	Provide a vehicle for trainees to reflect on educational experiences
Create or update Portfolio Review forms <i>Reviews>Form Templates</i>	Ensure trainees are reviewed in a timely manner Edit the widgets used to ensure correct data is reported
Schedule Reviews <i>Reviews>Manage Reviews</i>	Ensure trainees are reviewed in a timely manner

Resources

Task	Purpose
Add and update home page resources	Put relevant files are in easy reach of program members
Check Department Manuals <i>Tools>Department Manuals</i>	Make sure files are up-to-date
Update Policies <i>Administration>Program>Policies</i>	Policies change from year to year. Make sure you have the latest version of each document