

Streamlining the Onboarding and Credentialing Process with MyEvaluations

Situation:

The University of Southern California (USC) has more than 950 trainees that must be onboarded each year. The onboarding process includes documents for both USC and Los Angeles County. For the past four years, the USC GME Office has used MyEvaluations' Onboarding and Credentialing Dashboard (OCD) module to acquire new hire records for their incoming trainees. By their own estimate, the GME Office reduced the effort spent onboarding new hires by 50%. Based on this success, USC has expanded their use of MyEvaluations for onboarding, credentialing, and termination. Over the past four academic years, USC used MyEvaluations to process more than 75,000 documents and forms incorporating 12,769 contracts with signature templates for both new and returning trainees that resulted in a seamless and comprehensive onboarding experience.

Two factors helped USC make effective use of the MyEvaluations OCD module – collaboration and creativity. In collaboration with their Human Resources (HR) and Employee Health Services (EHS) offices, the USC GME Office increased the efficiency of the onboarding process and improved cooperation between these offices and trainees. The USC GME Office additionally has found an innovative use for the OCD module to manage other workflows such as trainee termination, extending its use beyond data collection related to onboarding or credentialing.

Collaboration:

Working closely with their HR department, the GME added contracts to the documents managed through the OCD module for new and returning trainees. These contracts were configured with Signature Templates that can be customized with PGY-specific stipend levels, trainee names, and other demographic data. Multiple stakeholders were included in workflows for each document, permitting each to add their

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respective electronic signatures and review dates. Shane Slater, USC GME administrator, explained how this change from paper to electronic contracts was a boon for USC's GME: *"What I like about [the Onboarding module] is that it is a seamless process. When I assign the contracts and the trainees download and then sign them, all that data is pre-populated. All they have to do is sign it. And it all works. This is the most important thing we use the signature templates for – this is a binding contract. And you have access to the actual contract so that you can download it and look at, which is great!"*

Starting the 2018-2019 academic year, USC incorporated the bulk of their new hire requirements from HR and EHS. This was a significant expansion from just signature-documents, allowing data collection and data integration to work seamlessly. At the request of HR, the GME integrated background checks and vaccination titers as well as various other required materials for onboarding new trainees which resulted in an astounding total of 38,930 documents and forms completed prior to the start of the 2019-2020 academic year by the 350 new and 600 returning USC residents. This is a 440% increase from the 2016-2017 academic year, when USC initially processed 8,807 forms. Over this four-year period, USC improved its system utilization, and successfully eliminated the need for paper-based document management.

To empower the HR and EMS office personnel, USC set up special MyEvaluations account access for them. Their accounts were configured with limited access to required onboarding and credentialing information. As such, these key employees could view, download, and print records directly from the system without direct assistance from the GME office. As Mrs. Slater reflects, *"We were able to say, 'Don't ask me for these documents anymore, you can get them.' Collaboration in this institution is a really big deal because volume is so high with how many people we are processing at one time. It's a lot and it's really difficult to*

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Shane Slater
Graduate Medical Education
University of Southern
California

get the GME, HR, and Employee Health Services on board and working together. So that was really nice. And they were able to harvest other documents besides contracts too – like diplomas and Live Scans (federal background checks).” In this manner, HR and EHS were better able to respond to trainee inquiries as this information was available with a few keystrokes. (EHS had been notoriously reliant on handwritten paper copies of their records). Best of all, because HR was pleased by how smoothly the OCD module worked, their office will continue to collaborate with the GME Office to further fine tune the onboarding process at USC.

Creativity:

“This is a powerful tool when you get creative. It has so much potential. For instance, we did use it for our Termination Process. We added all termination documents and signed them using the Onboarding module as well. One department wanted me to use the WebAds Scholarly Activity form, so I created one of those forms. There are so many things you can do with it. We use this for our institution Emergency Contacts list. That was a big one. And Emergency Contact information is required, so they have to fill it out and provide all the information we need. We attached Learning Assignments to Onboarding Documents, so that when the trainees got here, they had already completed the SAFER (Sleep Alertness quiz) requirement.” Shane Slater, USC

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*Shane Slater
Graduate Medical
Education University of
Southern California*

Smart Strategies to Manage Your Onboarding Process

- **Configure your custom onboarding requirements**
- **Plan your onboarding timeline immediately after the Match**
- **Assign requirements to new hires and returning trainees**
- **Simplify the onboarding process with an intuitive dashboard**

- **Enforce workflow with automated email reminders and due dates**
- **Track compliance with a color-coded dashboard**
- **Provide Human Resources and Employee Health with view access**
- **Export documents as needed**

- **Capture electronic signatures at no additional cost**
- **Easily gather custom and state-required forms**
- **Centralize all documents, licenses, and certificates**
- **Secure your data with HIPAA & HITECH compliant protection**

- **Go Paperless – environmentally friendly**

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