# Getting Ready for 2019 - 2020

**In preparation for the new academic year we recommend preparing with the tasks listed in this document. Please contact Support with any special request or if you need assistance with building or transitioning your schedules.**

Complete each section of tasks outlined below in preparation for the new academic year:

## Tasks to Complete

## Managing Users

### Step 1: Establish or Re-establish Connectivity with ERAS/AAMC

Three easy steps to establish a connection from MyEvaluations.com to ERAS/AAMC. Use this for direct data importing from ERAS into your MyEvaluations.com account:

**Step 1.** **DIO Authorization:** Each year the DIOs/DMEs must authorize the release of your institution's data and designate MyEvaluations.com in the web-based PDWS. PSU, APSU and PC1 users will be alerted on their PDWS Dashboard when the authorization has been completed.

Steps for or DIOs/DMEs on the PDWS Dashboard (**Click here for complete instructions**):

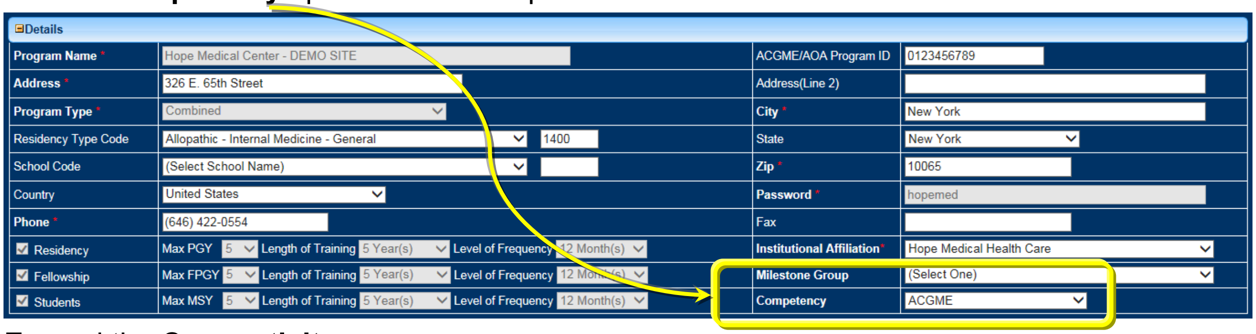
1. Accept the amended Terms and Conditions with the new terms of service for the new data exchange.
2. Navigate to the **Setup** tab in PDWS Setup Menu > RMS tab (left navigation).
   The question that appears to Approve and to select vendor > Choose MyEvaluations.com > Click Save/Submit.

**Step 2.** **Setup "Will Start" for incoming residents:** Authorized program staff must update all the matched applicants' application status to "Will start" in the web-based PDWS (ERAS).

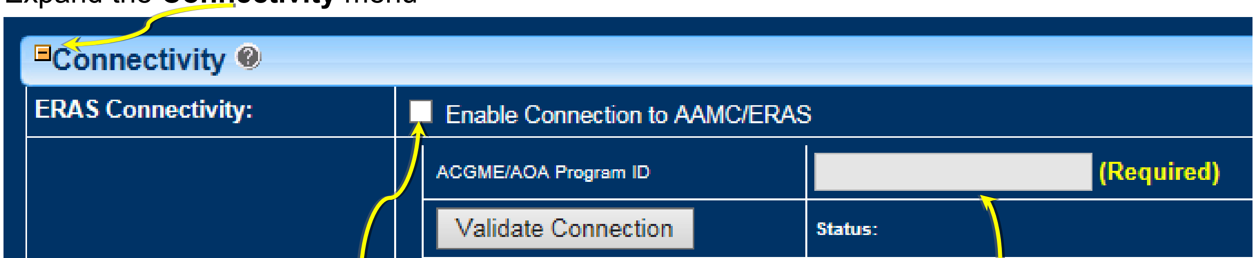
**Step 3.** **Enable ERAS in MyEvaluations.com:** The Global Administrator, Program Director or Program Administrator must authorize and enable connectivity service.

**A.** Go to the menu Setup

**B.** For the **Competency** option select the option for **ACGME** or **AOA**



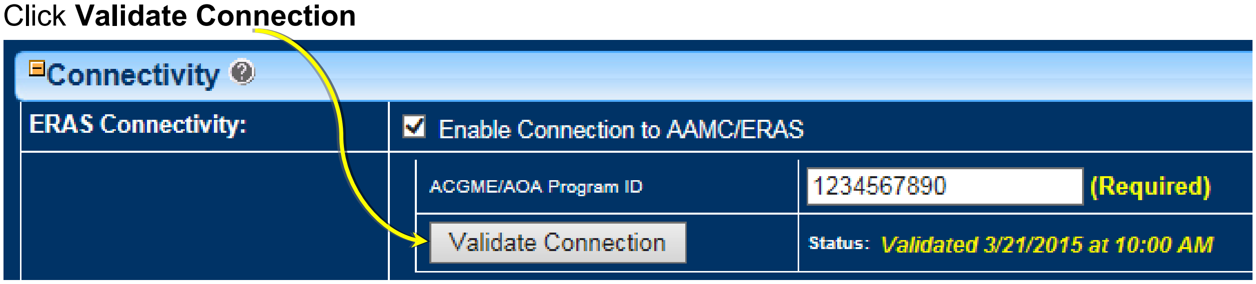

**C.** Expand the **Connectivity** menu




**D.** Check-off the option to "**Enable Connection to AAMC/ERAS**"

**E.** Enter you ACGME or AOA Program ID

**F.** Click **Validate Connection**




Once the connection has been validated you will receive a validation date and time confirmation listed in the Status field.

## Step 2: Importing Data from ERAS/AAMC or Update from a File


Once connectivity to ERAS/AAMC has been validated (see previous page), then use below steps for data importing into MyEvaluations.com.

1. Go to the menu **Users** > **User Importing**
2. **Step 1 of 3: Select the type of user:** Select "Resident" or "Fellow" user type to import.

**Import from ERAS** or **File to Upload**.

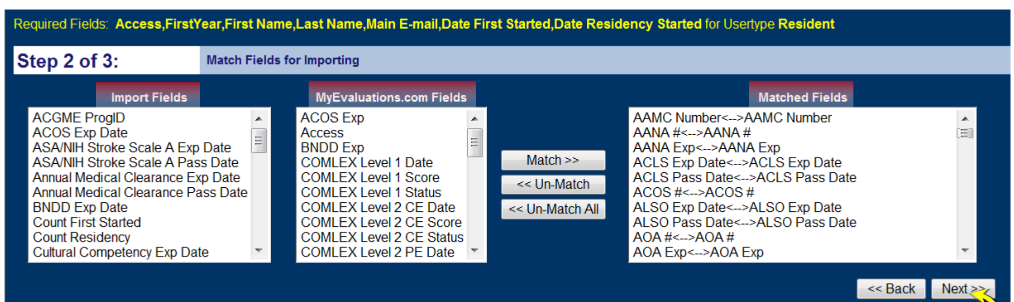
3A. ERAS data importing
Click **Import from ERAS**

3B. Uploading data from a file
Click **File to Upload**
If the Excel file has more than one sheet you will be prompted to select the desired sheet to use for importing.

- Click "**Browse**" to locate the data export file you saved on your local computer.
- Once the file is located, select the file and click Open

4. Click "**Next**"
   - If importing a Microsoft Excel file with one or more sheets you will be prompted to select the Sheet Name from the file. Select the appropriate sheet name and click Next.
5. **Step 2 of 3: Match Fields for Importing:** Identify the specific fields to be imported into MyEvaluations.com. The system will automatically match field names with standard headings. All additional fields may be manually matched:

   There are two columns, with the "**Import Fields**" displaying the field names from your data import file, and "**MyEvaluations.com Fields**" displaying the field names available in MyEvaluations.com. The "**Matched Fields**" shows the fields that have been matched and are ready for importing.




   - Select a field name from the **Import Fields** column, and the corresponding field from the **MyEvaluations.com Fields** column.
   - Click Match for to pair the fields, and to add into the **Matched Fields** column.
   - When adding new users the minimum Required Fields include First Name, Last Name and Main E-mail; Date First Started and Date Residency Started is also required for residents and fellows.
   - When all required fields are matched click "Next".
6. **Step 3 of 3: Select Users for Importing:** The confirmation page displaying the user information to be imported into MyEvaluations.com. By default all users are selected for importing. Note the check mark in the far left column represents each selected user that will be imported or updated. By default all imported users are checked for importing. The following fields are always displayed for confirmation:

**MINIMUM REQUIRED FIELDS FOR DATA IMPORTING**

- ✓ **First Name**: Required field
- ✓ **Last Name**: Required field
- ✓ **Main E-Mail**: Each user has both a Main (*required*) and Permanent e-mail field.
- ✓ **Shared**: When your department is linked to other departments you will have this option. By default the Shared option will be checked. If check then the user will be marked as shared, and visible to linked departments.
- ✓ **Sub-Specialty** *(for attendings and PA/NPs)*: Displayed and Required field when importing attendings and PA/NP/Tech/Others.

- ✓ **Date First Started**: Default value is the start date of the current academic year. For residents and fellows this will default for both the First Date of Starting Residency and the Date First Started in your department.
  - Check off all the users that will be imported or updated.
  - Update the Main E-mail address for sending a welcome email.
  - Update the Start Date if the default date is not accurate.
  - Select **Sending Welcome e-mail to imported users** at the bottom:

At the bottom of the table in Step 3 of 3 there is an option to send a welcome e-mail to new users.

**Do you want to send New User Welcome Email:** ◉ **Yes** ○ **No**

By default this option is set to "**Yes**" and a welcome e-mail will be sent to imported users. Select "No" and a welcome e-mail will not be sent. *If you do not send a welcome e-mail, then new users will not receive an initial e-mail with access instructions to MyEvaluations.com. However they will receive instructions when they are assigned evaluations.*

- Click **Confirm Data Importing** to continue to the next step.

**Confirmation Page**

The last step after selecting Confirm Data Importing will depend on the options you are importing.

1. **Importing New Users:** If you are importing new users, then you will receive a green confirmation table for all the new users that have been imported. A red confirmation table with the heading "List of Not Imported Users" that will display users not imported. Review the "Reason" column for an explanation. Click Update in order to change user demographics and retry importing for failed users.

2. **Updating Demographics:** If you are updating user demographics, then you will receive a red confirmation table with the heading "List of Existing Users: Click below to Update Demographics Data" that will display users to be updated.

   - Click **Update Demographics Data** at the bottom of the page to continue.
   - You will receive a confirmation message "Demographics data for existing users will be updated." Click **OK** to continue.
   - If Importing and Updating simultaneously, you may be returned to Step 3 of 3 for another confirmation. Review the information and click **Confirm Data Importing** at the bottom of the page.
   - You will receive a final green confirmation table with the heading "List of Updated Users." Updating has been completed and confirmed.

**IMPORTANT: User must validate their email address in order to receive email notification from MyEvaluations.com**

**IMPORTANT:** According to the AAMC your access to transfer the data into MyEvaluations.com will remain available only until the end of your application season, May 31, 2019.

| Date | Event |
|---|---|
| **May 31st 5:00PM ET** | Closure of ERAS web applications and external facing data services. |
| **June 1st – June 5th** | Production Verification of ERAS applications. Transcript Service will be re-opened during this window. |
| **June 6th 9:00AM ET** | ERAS 2010 Season Open – Applicants can begin completing their application, gather documents and searching for programs. |
| **July 5th** | Early opening for applicants applying to July cycle fellowships. |
| **July 15th** | July cycle fellowship programs will have access to view applications submitted by applicants. |
| **September 5th** | Early opening for applicants applying to ACGME accredited residency programs and residency programs previously under AOA Accreditation. |
| **September 15th** | ACGME accredited programs will have access to view applications submitted by applicants. |
| **October 1st** | MSPE are released to programs. |
| **November 21st** | Early opening for applicants applying to December cycle fellowship programs. |
| **December 1st** | December cycle fellowship programs will have access to view applications submitted by applicants |

## Step 3: Email Validation

After new users have been imported the system will automatically send a Welcome email *(unless you unselect this option)*. Users will also receive an **Email Verification** email that includes a link for validating their email address.

Hope Medical Center
Residency Demo Site

**Dr. Nayudu,**

**Please validate your email with MyEvaluations.com. This is a required step for completing your registration with Hope Medical Center - DEMO SITE .**

**Click on the link below to validate your email, and to activate your account:**
**Click here to validate your email address**

*If you are unable to click on the link, then copy and paste the link into your browser:*
https://www.myevaluations.com/Login.aspx?crypt=0x010000007a2c595bb3e12231459726eb51eeb7e47e709fd20383816fdbd402ae373aa01c0c2dea7e20752a49d45f63da60805049ee6380f

**Please direct your questions to:**

Customer Support at (646)422-0554 or email: support@myevaluations.com

**Thank You**

*(This message was automatically generated by MyEvaluations.com © 1998 - 2014)*

Once the user clicks the link, then their email is validated, and they will start receiving email notices from MyEvaluations.com. If a user fails to confirm their account, then a **yellow exclamation** will be listed next to their email address, from the menu Users > Add/Edit Existing Users:

| Action | Username/Password | First Name | Last Name | Type | Access | Year | Level | E-Mail Address |
|---|---|---|---|---|---|---|---|---|
| | JDoe4 / hopemed | John | Doe | Resident* | User | 2014 | PGY-0 | hopemed@myevaluations.com |

You may click on their email in order to resend a notice. To resend notices to multiple users go to the menu Users > Send Reminders.

Once the user validates their account, then a **green checkmark** will be listed next to their email address:

| Action | Username/Password | First Name | Last Name | Type | Access | Year | Level | E-Mail Address |
|---|---|---|---|---|---|---|---|---|
| | JDoe4 / hopemed | John | Doe | Resident* | User | 2014 | PGY-0 | hopemed@myevaluations.com |

# Update Schedules

## Step 1: Download OnCall

Skip this step if you have already downloaded and installed OnCall.exe. Otherwise download the desktop application for building and publishing online schedules:

**Download the AMION administrator's module for managing schedules:**
https://www.amion.com/OnCallSetup.exe

If your department does not have an OnCall Scheduling service agreement, please contact our Sales office for assistance (Sales@MyEvaluations.com).

**Installing the AMION (OnCall) software**

Choose the download option above. If your browser allows it, run the program directly from the web site. When it runs, click the Extract button, and you'll be ready to use OnCall.

If you cannot run the file directly from the web site, then save the file to your computer and open the saved file. For example, it will be named "OnCall.exe". Locate the saved file and run the file. Please run the file in order to install the software. If you cannot find the file nor have trouble running the install file, go to Search option on the Windows Start menu and search for "OnCall". When you've found the file, double click on it. Click on the Extract button to install the software.

For comprehensive instruction on managing your schedules please go to http://www.amion.com/Help.shtml.

Once you have uploaded your schedules, please post your Admin and Schedule passwords into MyEvaluations. Go to the menu Evaluations > Assign Evaluations > Integrated OnCall Schedules

**Instructions for managing AMION**

Please access the following links for instructions on using AMION:

A. **Crash course on setting up AMION**: http://amion.com/cgi-bin/ocs?Page=Help:15
*Instructions for setting up schedules, and for moving into the next academic year.*

B. **Accessing and managing schedules**: http://amion.com/cgi-bin/ocs?Page=Help:56

C. **Schedule backup and what to do if you get into trouble**:

- Schedule is missing or blank. What happened? Does anyone else handle your schedule? If so, it's possible they overwrote your work by not opening "from the web" when they started doing some work. If that's the case, look beneath the online schedule for the time and date stamp. To the right in orange text should be the name of the administrator that last published the schedule. If someone else shares the scheduling tasks, then send them this link to learn how to share access the correct way: http://amion.com/cgi-bin/ocs?Page=Help:56

- How can I access a backup of the schedule? Backups are performed automatically. To retrieve a back, use the OnCall (AMION) application:
  1. Go to menu File > **Open from backup folder**
  2. Click "Open from amion" in the lower right corner. You will be presented with a list of available backups in a dialog box.
  3. Scroll through to find a backup that has the information you want. Open the file and publish (File > Publish to AMION) in order to overwrite current schedule. If there are additional issues, then please contact us at Support@AMION.com or Support@MyEvaluations.com.

## Step 2: Convert Schedule from 2018-2019 to the 2019-2020 Format

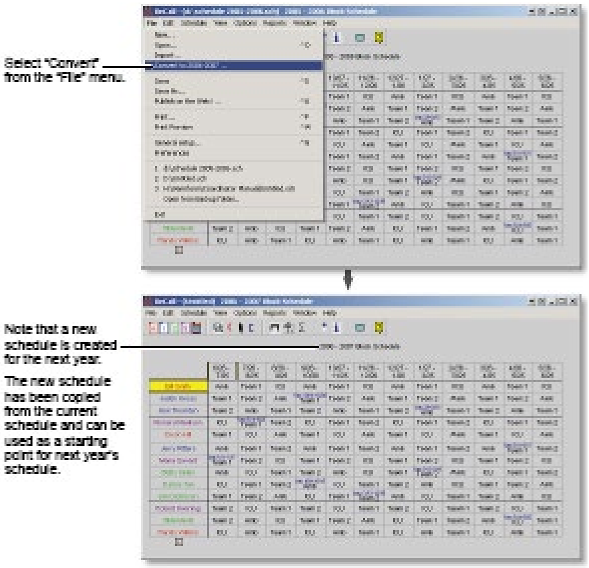
As the end of each academic year approaches, it will be necessary to set up schedules for the next academic year. Do Not Create new users instead follow these steps for creating a seamless transition to next year.

1. Download and install OnCall (see above instructions).

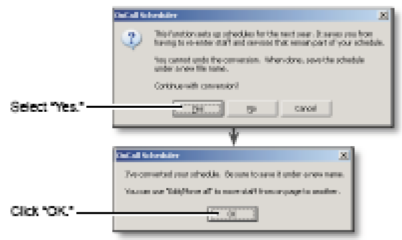
**Upgrading OnCall: Confirm you are using the newest version of OnCall.**

2. Open your current schedule with the newer version of OnCall.

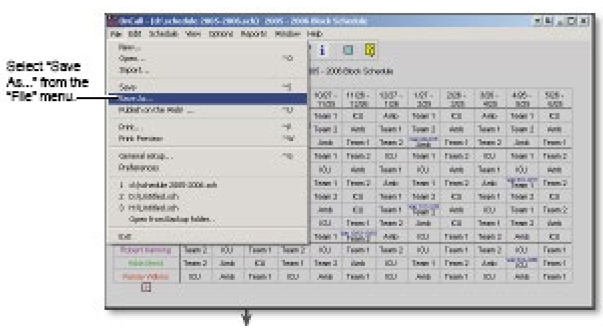
3. Convert the current schedule to a new year.

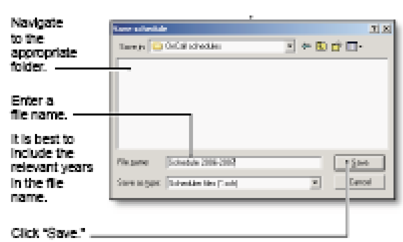



4. Confirm the conversion.




5. Save the new schedule into a new file.



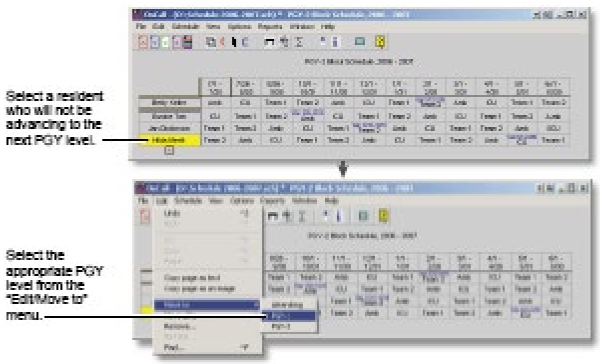

Working with separate schedules

Each schedule can still be opened, edited, and uploaded to the AMION website. On the website, the schedules will appear as one continuous schedule.

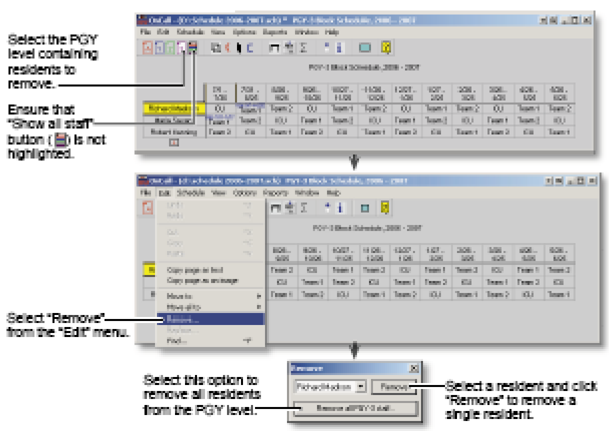
## Step 3: Remove Graduates and Advance Residents on Schedule

Updating data in a converted schedule

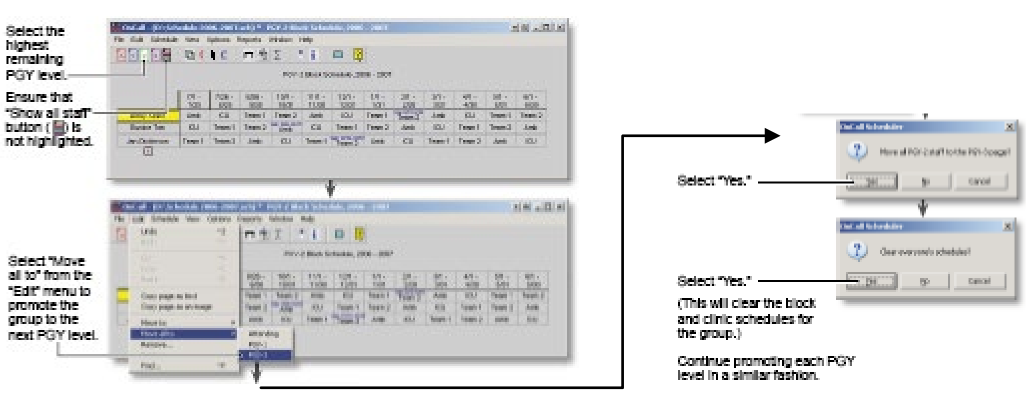
1. Any residents who will not be advancing to the next PGY level (such as off-cycle residents) should be moved back by one PGY level through OnCall and MyEvaluations.com.




2. Remove any residents who will not be returning next year (such as graduating residents).



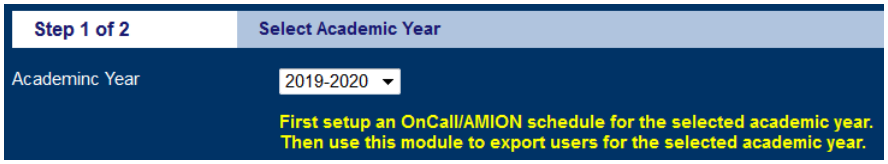

3. Promote the remaining residents to the next PGY level.



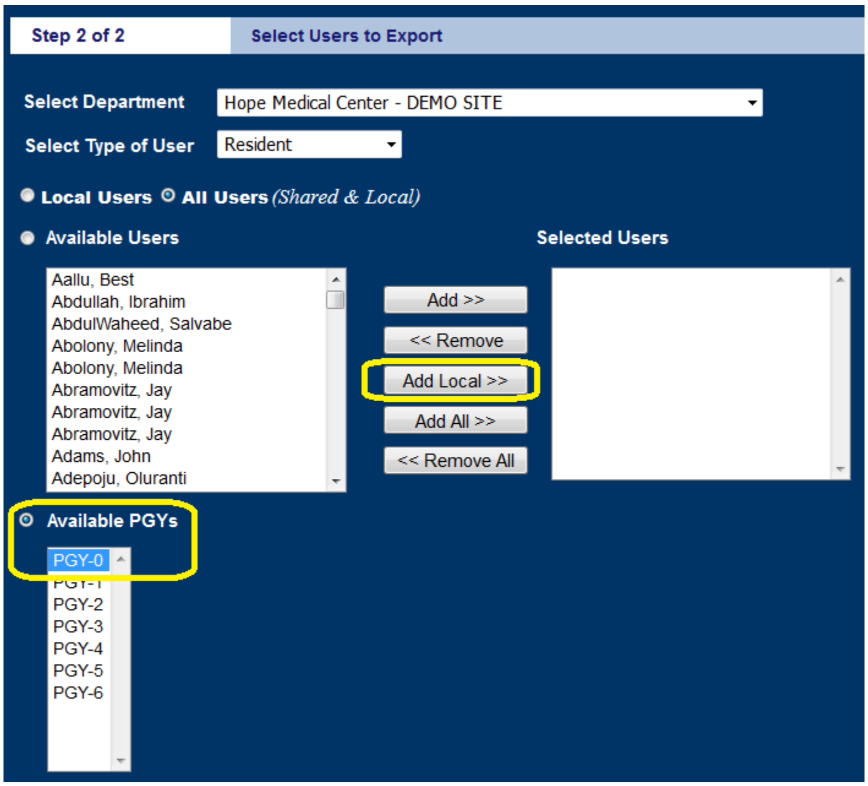
## Step 4: Export Users to OnCall/AMION Schedule

After importing new users from ERAS, or importing from Excel, you may export the users to AMION. In MyEvaluations.com go to the menu Evaluations > Assign Evaluations > Integrated OnCall™ Assignments > Export to OnCall.

1. Close the OnCall application on your desktop.
2. Select the “2019-2020” academic year.



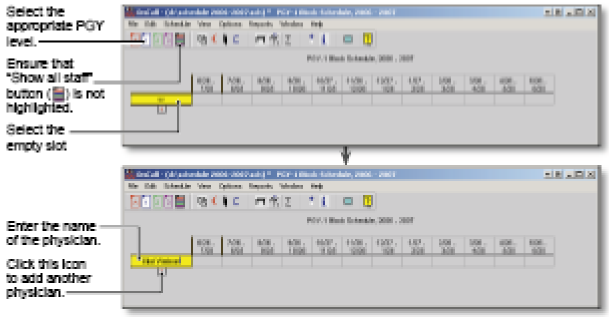

2. Select “Available PGYs” and choose the “PGY-0” option for incoming interns, and click “Add Local”



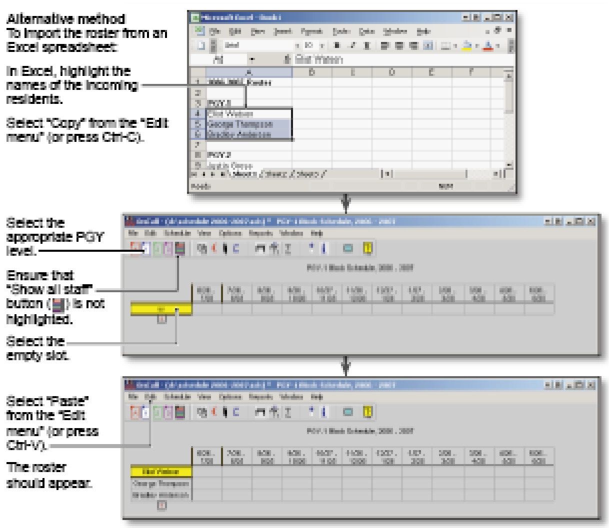

3. Scroll to the bottom and click “Export to OnCall”. This will export your users to the schedule.
4. Open the OnCall application, and the new users will be available to schedule.

## Step 5: Manually Adding users to OnCall/AMION Schedule

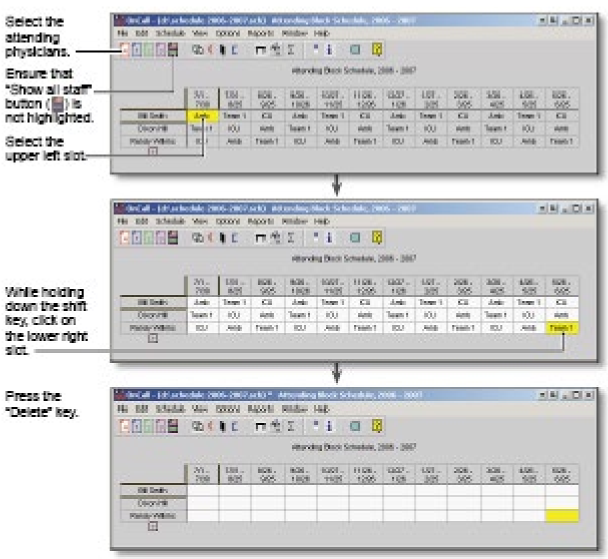
1. Add the new physicians (such as incoming residents) to the schedule.



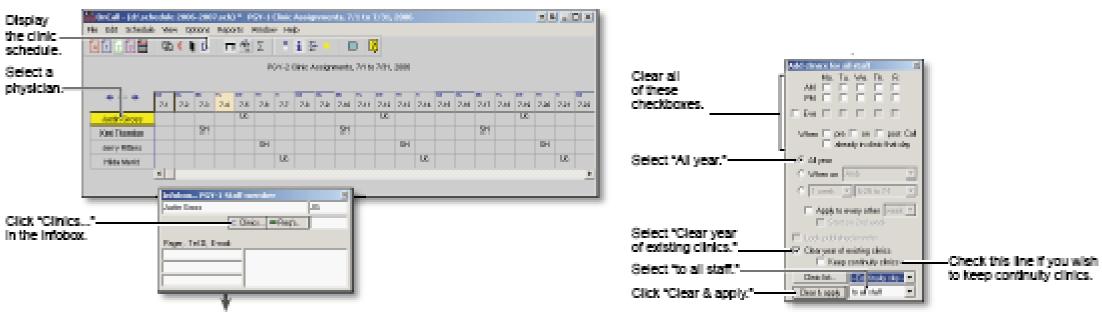

Alternative method for importing users:




2. Clear any remaining block schedules that should not carry over to the next year. (In particular, the attending physicians block schedules usually need to be cleared).



3. Clear any clinic schedules that should not carry over to the next year.




4. The schedule is now ready for you to enter the block, call, and clinic schedules for the next year. This would be an appropriate time to save your work.

## Additional Schedule Changes

# Synchronize Data

Each academic year, **NEW** users, rotations, clinics, and calls must be synchronized between OnCall schedules and MyEvaluations.com. Go to the menu Evaluations > Assign Evaluations > Integrated OnCall™ Assignments. ***Complete these steps only when you add new users, rotations, calls or clinics to your schedule.***

## Step 1: Synchronize Users

**Follow the steps to synchronize new users.** Go to the menu Evaluations > Assign Evaluations > Integrated OnCall™ Assignments > Sync Users (OnCall & MyEvaluations.com).

Click "Auto Sync" to match all new users automatically. Then manually match users that were not automatically matched. All graduates and archived users should be un-synced.

## Step 2: Synchronize Rotations

You may add new rotation names from the menu Evaluations > Assign Evaluations > Manage Rotation Names.

**Follow the steps to synchronize new rotations.** Go to the menu Go to the menu Evaluations > Assign Evaluations > Integrated OnCall™ Assignments > Sync Rotations (OnCall & MyEvaluations.com).

Click "Auto Sync" to match any new rotation names automatically. Then manually match rotation names that were not automatically matched.

## Step 3: Synchronize Clinics

You may add new clinics from the menu Clinical Hours > Clinics/Conferences > Manage Clinics/Conferences.

**Follow the steps to synchronize clinics.** Go to menu Clinical Hours > Clinical Hours Setup > Sync Clinics (OnCall & MyEvaluations).

Click "Auto Sync" to match any new rotation names automatically. Then manually match rotation names that were not automatically matched.

## Step 4: Synchronize Calls

**Follow the steps to synchronize new call with clinical hour activity types.** Go to the menu Clinical Hours > Clinical Hours Setup > Sync Call Services (OnCall & MyEvaluations). Click "Auto Sync" to match any new calls Clinical hour activity types. Then manually match rotation names that were not automatically matched.
Call activities are managed from the menu Clinical Hours > Clinical Hour Setup > Manage Activity Types.

Now your schedule data is fully synchronized with MyEvaluations.com.

# Add/Update Evaluations

## Step 1: Design New Evaluation Forms

The start of the academic year is a good time to introduce new evaluations, and to update the old evaluation forms with new and more relevant evaluations. Make sure each evaluations covers relevant topics, rotations, milestones, and rotation objectives.

Design new evaluations from the menu Evaluations > Design an Evaluation:

- Express: Design an evaluation using a single answer scale throughout the entire evaluation form.
- Custom: Design an evaluation using different answer scales for each question.

The 4-Step process for building an on-line Express evaluation. The fully automated feature will guide you step-by-step for designing your own customized on-line evaluation.

**Step 1:** Select the target audience, select a subject (group) to be evaluated, give an evaluation title, specify the requirements for comments, and specify the availability of an evaluation. Select 'Next' to advance to Step 2, or 'Cancel' to exit and return to the Evaluations menu.

**Step 2:** Select the answer choices by choosing a scale from the drop-down menu, and a respective category by clicking on the appropriate radio button. Select 'Next' to advance to Step 3, 'Back' to return to Step 1, or 'Cancel' to exit and return to the Evaluations menu.

**Step 3:** Select the questions to include in the evaluation. Scroll through the list and mark each question with a check mark. Select 'Next' to advance to Step 4, 'Back' to return to Step 2, or 'Cancel' to exit and return to the Evaluations menu.

**Step 4:** View and confirm the evaluation as it will appear when published. Select 'Finish' to confirm the evaluation, 'Back' to return to Step 3, or 'Cancel' to exit and return to the Evaluations menu. By selecting 'Finish' you may still make changes to the evaluation.

## Step 2: Update Linked Evaluations to Rotations

Each academic year, **NEW** evaluations must be linked to rotations in order to create automatic evaluation assignments and to send automatic email notifications. Use this feature to specify which evaluation will be used for each rotation. Go to the menu Evaluations > Assign Evaluations > Integrated OnCall™ Assignments > **Link Evaluations to Rotations**. ***Complete these steps only when you have new evaluation forms.***

Link specific evaluations for each rotation. Evaluations may be specified by rotation as well as PGY level. Select a rotation name, then specify the desire evaluations, and click Update All at the bottom of the page.

- Only linked rotations can be included in auto-assignments (see Step 2).
- Only published evaluations are included in auto-assignments.

Start by selecting a rotation name “Select a Rotation Name to Manage Evaluation Assignments.” For each rotation name specify the evaluations that will be automatically assigned. After the selecting the desired evaluations, click “Update All” at the bottom of the page.

**Optional overlap settings:** By default all evaluations will be assigned based on overlaps in the block schedule. Use the overlap settings to include overlaps in the call or clinic schedule. This is useful when residents and attendings are not on the same block schedule, but may have multiple overlapping call or clinic schedules.

Overlap with Clinical Schedule

Overlap with Call Schedule

No Call/Clinic Overlap

3 Number of Overlaps

- **No Call/Clinic Overlap:** (default) only the block schedule is used to determine which evaluations are assigned.

- **Overlap with Call Schedule:** In addition to using the block schedule, the system will also use the call schedule to determine which evaluations are assigned. Select this option then select the number of overlaps that should queue an evaluation. *For example, a resident and attending may not be on the same block schedule, however they may have multiple call with one another. If this option is selected with 3 overlaps, then evaluations are assigned when the attending and resident have had 3 calls with one another.*

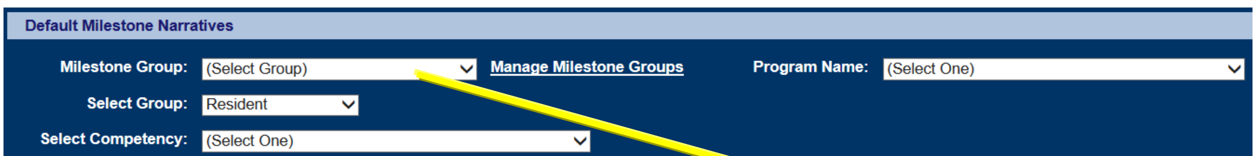
- **Overlap with Clinic Schedule:** In addition to using the block schedule, the system will also use the clinic schedule to determine which evaluations are assigned. Select this option then select the number of overlaps that should queue an evaluation. *For example, a resident and attending may not be on the same block schedule, however they may have multiple clinic days with one another. If this option is selected with 3 overlaps, then evaluations are assigned when the attending and resident have had 3 clinic days with one another.*

## Step 3: Map New Evaluation Questions to the Sub-Competencies/Milestone Narratives

All new evaluation questions must be linked to the sub-competencies and milestones.

Access the menu Evaluations > Curricular & Milestone Management > **Milestone Performance Mapping**

Your program-specific milestones is listed by selecting the **Milestone Group** (see below example). If your published milestone is not listed then click **Manage Milestone Groups** in order to add your own set of milestones or contact Support@MyEvaluations.com for assistance.

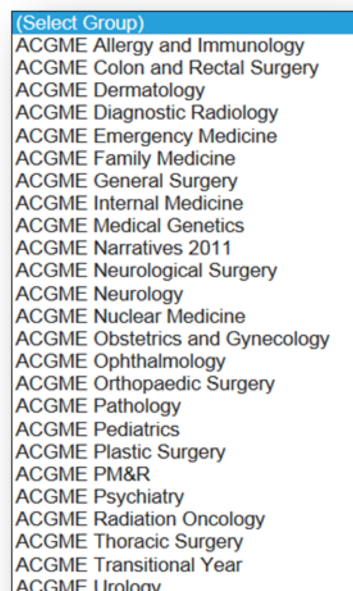



All the Milestone Narratives are sorted by the 6 Core Competencies. Select the desired Milestone Group, and select a Competency to access the specific Sub-Competencies and Milestone Narratives.

Each Milestone Narrative can be associated with the following data point categories:

(1) Entrustable Professional Activities
(2) Curricular Milestones
(3) Procedures Performed
(4) Quiz Questions

The data from these four categories can be mapped to your sub-competencies/reportable milestones.

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Start by selecting one the core competencies. Then you will see the sub-competency and milestones associated with the competency. Now you have the option to add EPAs, Curricular Milestones, Procedures and/or Quiz Questions to the sub-competencies and milestones.

*Milestone Narratives/Descriptors associated with each sub-competency.*

*Each **Sub-Competency** is listed here*

*<u>Mapping Options</u>*

***Add Entrustable Activity***

***Add Curricular Milestones***

***Add Procedure***

***Add Quiz Question***

***Add Conference***

*Click **Add Milestone Narrative** to add a new sub-competency*

*Click **Update All Users** to*

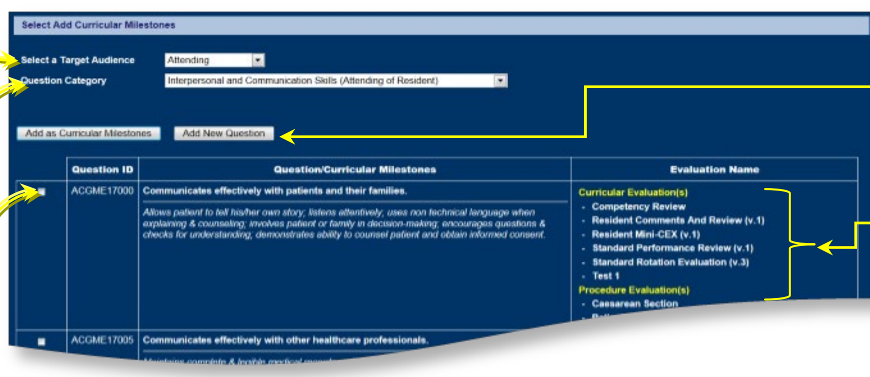

*Move gauges in order to set **Levels of Readiness** for each PGY level.*

Each curricular milestone is an evaluation question that may appear on one or more evaluation form. Start by clicking “Add Curricular Milestones” and choose the questions you wish to map.

***Select a Target Audience** or **Clinic/Conference** source of the evaluator.*

*Select a **Question Category***

*Check off each curricular milestone that will be associated with the sub-competency*




*Click **Add New Question** to add new curricular milestones.*

*List of **Evaluations** and **Procedure Evaluations** associated with each curricular milestone.*

Check off each Curricular Milestone (evaluation question) that you want to associate with the selected sub-competency. Then click **Add as Curricular Milestones**. Now click **Update All Users** to save your data.

Now the data from your evaluation forms is mapped to your sub-competencies and milestones.

# Add/Update Rotation Goals and Objectives

## Step 1: Upload New Goals and Objectives

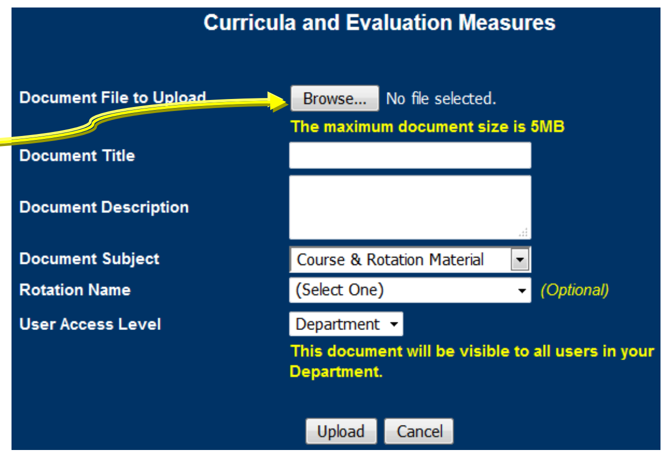
Use these instructions to add rotation-specific goals and objectives, and to update the old goals and objectives with new and more relevant documents. It is important that each document is rotation-specific and covers relevant topics and objectives. ***Complete these steps only when you have new evaluation forms.***

The system will send users automatic email notification to review the goals and objects. You must upload the goals and objectives, and setup rotation schedules (see above “Update Schedules” and “Synchronize Data”). Once completed, users will receive automatic email notifications 1-day before the start of the rotation, with a link to directly access and review the documents in MyPortfolio. The system will also track the date a user has reviewed the associated documents.

There are two places in the system you may upload goals and objectives.  Both will give you the same result:

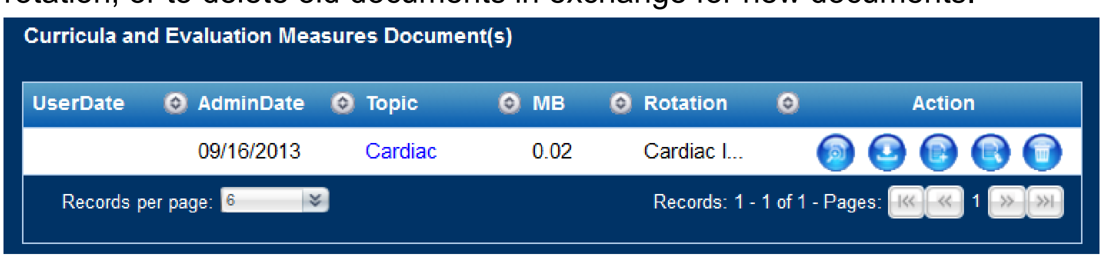
Option 1: Go to the menu MyPortfolio > Policies, Curricula, Videos & Conference Handouts > **Curricula and Evaluation Measures.**

A. Click “Add New Curricula and Evaluation Measure” to launch a pop-up window *(shown to the right).*
B. Click “**Browse**” to select the document.
C. The “**Document Tile**” show be a recognizable name.
D. The “**Document Description**” should outline what is included in the document.
E. The “**Document Subject**” should be “Course & Rotation Material”




F. The “**Rotation Name**” should be the appropriate rotation for the selected document.

   If the selected rotation has existing documents, the you will be presented with a table (example below). You may choose to add multiple documents to the rotation, or to delete old documents in exchange for new documents.

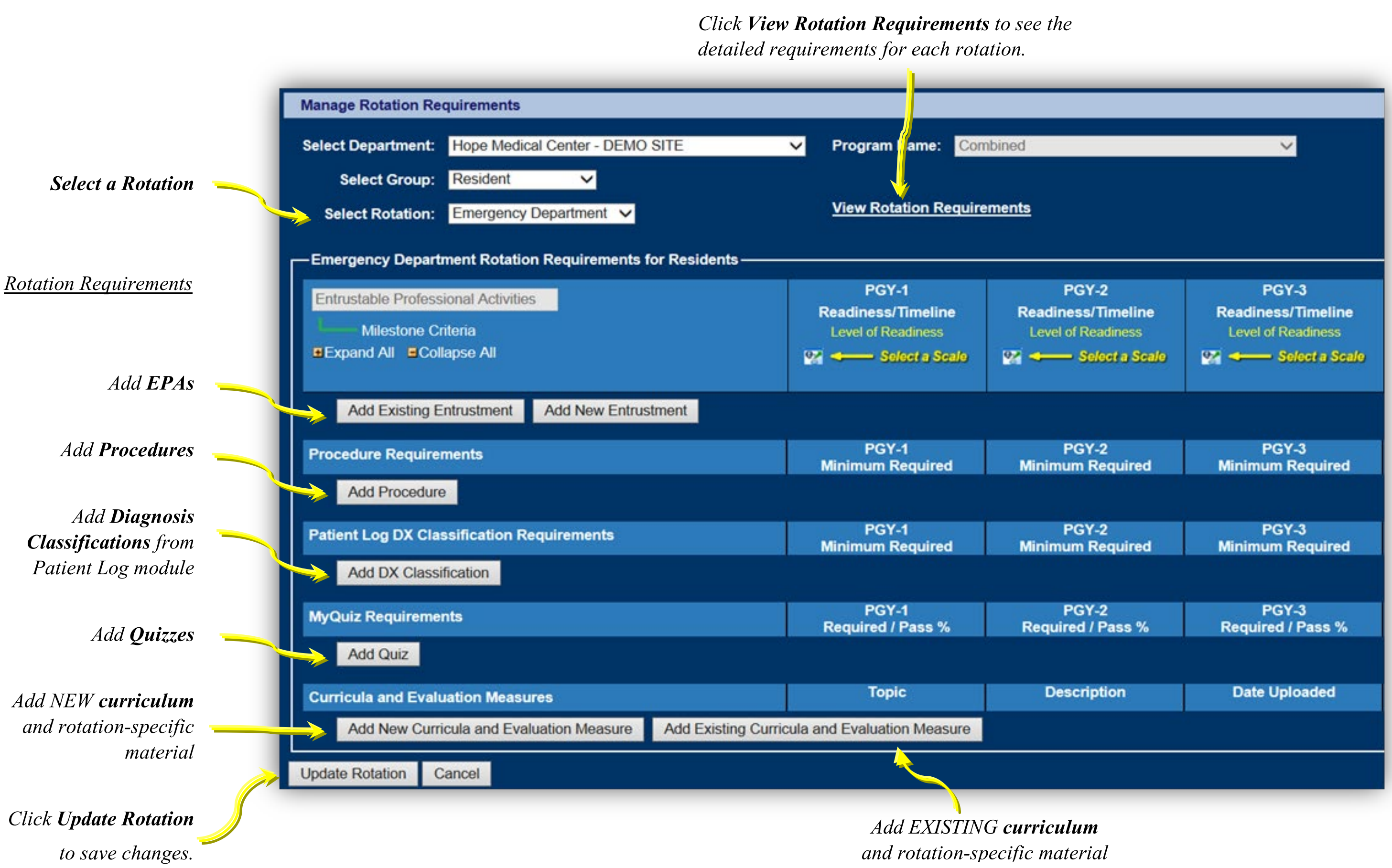



G. The “**User Access Level**” is defaulted to **Department** and should remain unchanged.
H. Click “**Upload**” to save the changes.

Option 2: Go to the menu Evaluations > Curriculum Management & Reports > **Manage Rotation Requirements**.

Use this module to establish your rotation requirements and to track each rotation's performance in comparison to established benchmarks. Select each item below to set benchmarks specific to each training level. Each rotation has specific requirements, including:

- **Entrustable Activities**: These are specific activities the trainee is expected to learn and develop proficiency. Set the expected Levels of Readiness to be achieved. These activities may be rotation-specific or common to multiple rotations.
- **Procedures**: These are specific procedures the trainee is expected to experience and perform. Set the minimum number of procedures to be logged. The procedures may be rotation-specific or common to multiple rotations.
- **Patient Logs**: These are specific Diagnosis Classifications (patient categories) the trainee is expected to see, evaluate and manage. Set the minimum number of patient encounters. The patient types may be rotation-specific or common to multiple rotations.
- **Quizzes**: These are specific quizzes the trainee is expected to complete. The quizzes will usually have questions pertinent to the rotation. Set the minimum pass requirement.
- **Curricula and Evaluation Measures**: These are rotation-specific learning documents, curricula and goals & objectives.




A. Click "**Add New Curricula and Evaluation Measures**" to add new material (use same instructions as Option 1 steps A-H).
B. Click "**Add Existing Curricula and Evaluation Measures**" to select from documents already uploaded into MyPortfolio. Choose a department administrator to continue.
C. Click "**Update Rotation**" to save changes.

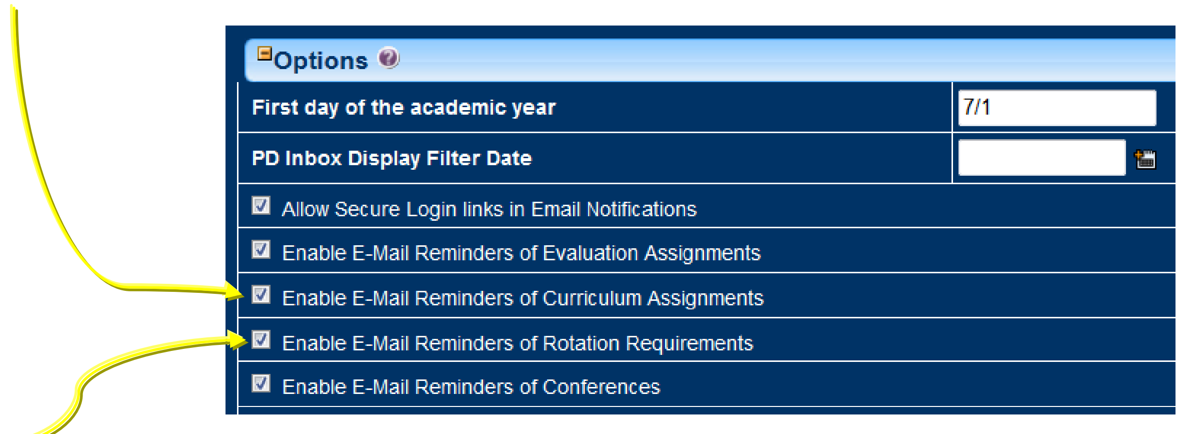
## Step 2: Enable Automatic Notifications

Use these to enable automatic email notifications for “Curriculum and Evaluation Measures” and/or “Rotation Requirements.” ***Complete these steps only if the features have not been previously enabled.***

Go to the menu Setup > **Options**.

There are two options to manage:

1. **Enable E-Mail Reminders of Curriculum Assignments**: This will enable notifications for goals and objectives uploaded through MyPortfolio > Policies, Curricula, Videos & Conference Handouts > Curricula and Evaluation Measures (see Step 1, Option 1).




2. **Enable E-Mail Reminders of Rotation Requirements**: This will enable notifications for rotation objectives setup through Evaluations > Curriculum Management & Reports > **Manage Rotation Requirements** (see Step 1, Option 2).

You may enable both features. If a rotation has both Curriculum Assignments and Rotation Requirements, then the system will send single email. The notification will include the Rotation Requirements and all associated Curricula and Evaluation Measures.

## Setup Onboarding Requirements

Use this section to setup a process for hiring a new employee and completing the required documents. Each new employee can be required to complete various "new hire" documents that are necessary to start within the institution. The same employees may be required to complete the credentialing documentation in order to have permission to perform specific tasks in the hospital.

The onboarding and credentialing process can be managed both at the department-level and at the institution-level. The features include:

- Tools to setup onboarding and credentialing requirements.
- Form creation for users to complete in order to meet the requirements.
- Document uploading tools for users to upload in order to meet the requirements.
- Track completion of forms and uploading of documents.
- Tools to manage email reminders to users and admins to complete requirements.
- Graphical dashboard tools for users to monitor completion status of requirements.
- Reports for administrators to monitor completion status of requirements of individual users, the department and the institution.
- Data integration into MyPortfolio > Credentialing Documentation > **Onboarding and Credentialing Dashboard**

### Step 1: Setup Onboarding Requirements

See pages 4-9 of the "Onboarding and Credentialing.PDF" document located under the menu MyHelp.

### Step 2: Assign Requirement Groups

See pages 12-16 of the "Onboarding and Credentialing.PDF" document located under the menu MyHelp.

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# Update Clinical Hour Requirements

Use this section to update the clinical hour requirements for the new academic year.

## Step 1: Setup Clinical Hour Rotation Blocks

Go to the menu Clinical Hours > Clinical Hour Setup > **Setup Clinical Hour Rotation Blocks**

Setup the Clinical Hour rotation blocks representing each rotation in your department, and specific to each PGY level. The default rotation block setup is by calendar month. Each rotation block is entered as MM/DD (month and day). MyEvaluations.com will automatically include the year for your rotation blocks.

Note: Enter all dates within a given year. For example, if you start at 07/01 then the last entry should be for 06/30.

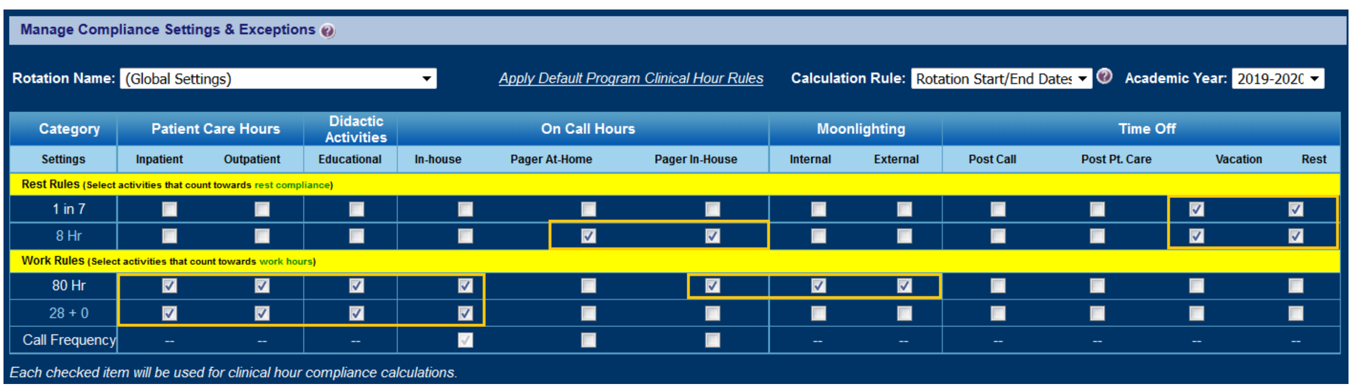
## Step 2: Setup Compliance Settings & Exceptions

Go to the menu Clinical Hours > Clinical Hour Setup > **Manage Compliance Settings & Exceptions**

Use this section to setup ACGME exceptions for Clinical hour compliance, and to customize rules specific for each rotation. Only make these changes when you familiar with all rule requirements. By default all Clinical hour reports are generated based on "Global Settings" for the current Academic Year. You have the option to customize the rules for specific Academic Year, Rotation and Training Level.

**Global Settings**

The rules configured under the global settings are applied to all rotations. Start by selecting the appropriate Academic Year. The default settings are as follows:




***NOTE:*** *All checked items are applied by default.*

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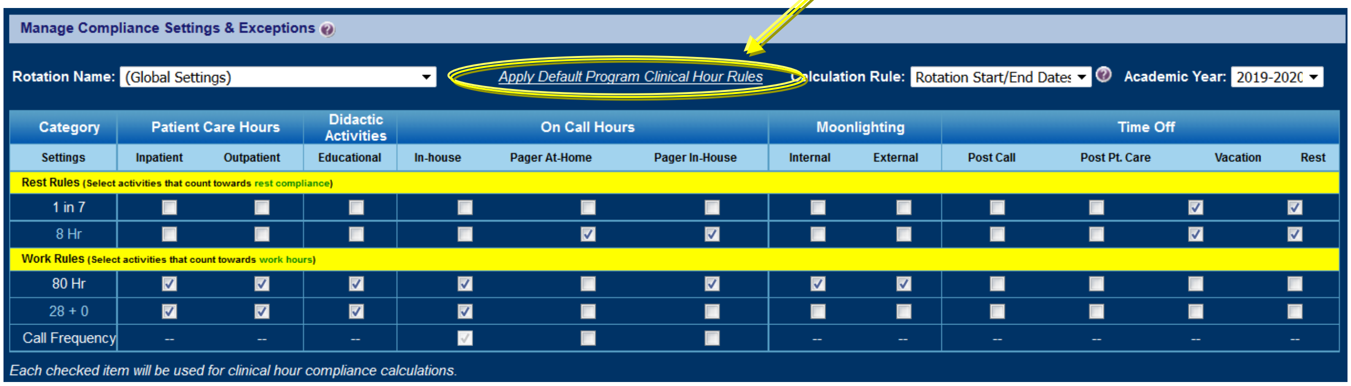
## Rotation-Specific Settings

The rules configured under each rotation name will be used only for the specific rotation. By default, when selecting a specific rotation name, the fields will be checked with the same options as the Global Setting. Select the option "**Apply Default Program Clinical Hour Rules**" in order to reset the current settings to the rules outlined by the ACGME for your program type:




**NOTE:** If you choose to setup rotation-specific rules, then you must configure the rules for all the rotations. When generating reports, you will have the option to choose "Global Setting" or "Rotation Specific" rules. By default, all reports will use "Global Settings."

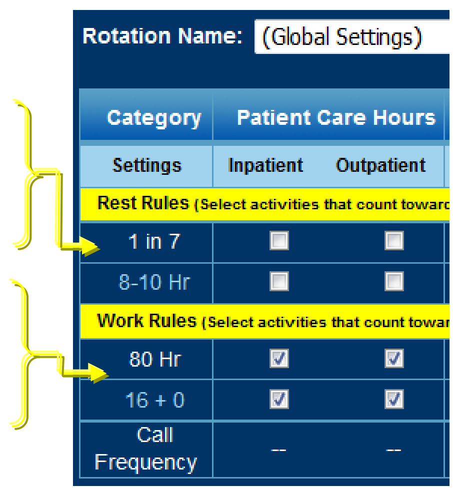
You may check or uncheck each item in order to apply the specified rules to each rotation. The rules are divided into the Rest Rules and Work Rules. By checking an option, you are applying the rule. By un-checking an option are excluding the rule. Selecting an activity under Rest Rule will force that activity to count towards rest compliance. Selecting an activity under Work Rules will force that activity to count towards work hours.

**WARNING: Selecting rules incorrectly will result in reporting that IS NOT consistent with ACGME Clinical hour rules. The default settings are consistent with Common Program Requirements (section VI.G.).**

Here are a few examples:

Selecting the Out-Patient for 1-in-7 Rest Rule will cause all Out-Patient activities to be counted towards the 1-in-7 rest. This is not consistent with ACGME rule requirements, since Out-Patient activities are not considered rest activities.

Selecting the In-Patient for 80 Hr Work Rule will cause all In-Patient activities to be counted towards the 80-hour rule compliance. This is consistent with ACGME rule requirements, since In-Patient activities are considered work hours.




You may modify the following options for the Global settings and for Specific Rotation and each Training Level. **You also have the option to disable specific requirements.**

Start by selecting the training level:


1. **Enable Moonlighting**: *default disabled for PGY-1 and enabled for all other training levels.* In addition to enabling this option for a training level, you must also activate the Moonlighting Activity (see Step 4 above).
2. **Rest Compliance**: *default will vary by level and program.* Minimum hours the resident should have off between shifts. The following are specific examples:

- **Previous ACGME: 8, 10, or 8-10**: As of 2017 rest tracking is no longer required. The 8 and 10 hour options will require the resident to strictly comply with those hours. The 8-10 option will generate a violation if the resident has less than 10 hours off. The 8-10/14 option will generate the same minimum rest violation, and will monitor for at least 14 hours off after a 24-hour shift.
- **Split Options: 6/12, 8/12, 10/12**: Using the 6/12 as an example, the trainee must have at least 6 hours off after a shift, or at least 12 hours off after a call prior to a new shift. The numerator period is defined by the AOA as "a reasonable rest time."
- **Shift Option: >=Shift**: The trainee must have a minimum rest period between shifts, as defined by the AOA: If shift is 20 or more hours, then 12 hours off;
  If shift is 12-19 hours, then 10 hours off; If shift is less than 12 hours, then 8 hours off

**Average Rest Over 4-weeks**: *default Yes.* By averaging the system will count the number of days off on the rotation, requiring 1 day off for every 7 day increment on the schedule, but averaged over the rotation. On a 28 day rotation the trainee should have 4 days off (28 days / 7 days = 4 days); same as 31 day rotation (31 days / 7 days = 4.43 days, rounded down to 4 days); while a 32 day rotation will require 5 days (32 days / 7 days = 4.57 days, rounded up to 5 days). Program in Internal Medicine and all those located in New York State are required not to average their rest compliance. For example, for every 7 days there must be 1 day off.

3. **Average Hours:** *default 80 hours.* Average hours a resident may work when averaged over four weeks. Options include values between 80-88 hours.
4. **24 Compliance:** *default 16+0 for first years and 24+0 hours for others.* Total number of continuous hours a resident may work without interruption or break. The options include
   - 16 + 0 hours: the user may submit up to 16 continuous hours in work without a break.
   - 24 + 0 hours: the user may submit up to 24 continuous hours in work without a break.
   - 24 + 4 hours: the user may submit up to 24 continuous hours of patient care, plus an additional 4 hours of post-care patient activities.
5. **Call Frequency:** *default 3 ((CPR VI.G.7.) PGY-2 residents and above must be scheduled for in-house call no more frequently than every-third-night (when averaged over a four-week period).* Maximum frequency of calls allowed. Options include values between 1-30.
   - **Average Calls Over 4-weeks**: *default Yes.* By averaging the system will count the number of days on the rotation and divide by the call frequency. The total number of calls cannot exceed this value. Selecting No will enable a strict call frequency option. For example, if the Call Frequency is set to 3, and No Averaging, then the user can be on call every 3rd day.
6. **Average Calls Over 4-weeks:** *default Yes.* Determines that call frequency may be averaged over the period of the rotation, with 7 day increments. If No, then call frequency will not be averaged, and will be counted in 7-day increments. This rule is determined by individual RRCs.
7. **Average Rest Over 4-weeks:** *default Yes. default Yes.* Determines that rest compliance for days-off may be averaged over the period of the rotation, with 7-day increments. If No, then rest compliance will not be averaged, and will be counted in 7-day increments.
8. **Time Off Interval**: *default 24 hours/week.* Total number of hours off required per 7-day increment.
9. **Rest before New Shift**: *default 5 hours.* Total number of hours off between activities, which results in a shift break and the automatic start of a new shift. Options include values between 3-16 hours.
10. **Night Float Frequency**: *default 6 shifts.* Maximum number of consecutive nights a resident may work on a night float schedule.

# Archiving and Promoting User

Use this section to archive graduates and promote remaining users to attendings.

## Step 1: Archiving Users without Promoting

Archiving should be completed in August after the new academic year has started, and remaining evaluations have been completed. Before archiving users:

Generate all detailed, comparative and summary reports before you archive a user. Confirm that ALL ASSOCIATED EVALUATIONS AND PROCEDURES HAVE BEEN COMPLETED. Use reports such as "Completion Status", "Overdue Evaluations" and "Ledger of Evaluations" and "Procedures Pending Authorization" to confirm that all activities are up-to-date.

**Once a user is archived, their incomplete evaluation assignments will be deleted; if unarchived, the deleted assignments are restored. Pending procedures to be reviewed on the archived trainee will remain for the supervisor to verify.**

**IMPORTANT: Before archiving users generate all comparative summary reports. Although you can still run reports on archived users, you will not be able to generate comparisons to existing residents.**

**Use the following steps to Archive users:**

**(1) Select default Admin:**
- A default administrator is required to complete the archiving process. This will ensure that archived administrators will be replaced in evaluation assignments that have already been processed.

**(2) Select user type(s) to archive:**
- For example, select "Resident" if you want to archive residents.
- Select the button to display the available names. You will be presented with users listed by year first started from high to low. Selecting other user types will present you with all respective names.

**(3) Select the users to be archived:**
- Place a check-mark by the name of each user you want to archive. A maximum of 5 users can be archived at any one time.
- Select the button to initiate the archive process.

**(4) Confirm Archiving:**
- Select the button to confirm the users to be archived. If the users you have selected are not accurate then select the button to change your selection, or select the CANCEL button to quit the archiving procedure.

**(5) Final Confirmation:**
- You will be presented with a series of confirmation screens to confirm the users selected for archiving.
- A pop-up page will display the users being archived. Print this page for your records:

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The following users will be archived by the MyEvaluations.com system:

- Eldridge Cleaver (ECleaver) / First Year = 2015

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NOTE: Please print out a copy for your records.
To make adjustments to the list, close the window and go back and either add or remove users.

- By archiving the selected users all associated data will be archived and deleted from the active user database.

**You have access to all archived data from the menu Reports by selecting the option for "Archived Users".**
- Select the button to confirm the users to be archived. **This is your last confirmation.**
- Please allow for the system to archive the users. You will be redirected to the archive page when the process is complete. **NOTE - Press the archive button once.**
- Select the CANCEL button to terminate archiving.

## Step 2: Promoting Residents to Fellows or Attendings

**IMPORTANT: You have the option to promote user without archiving.**

Before promoting please review the section on archiving users.

**Use the following steps to Promote users:**

**(1) Select default Admin:**
**(2) Select user type(s) to promote:**

- For example, select "Resident" if you want to promote residents to attending or fellow.
- Select the button to display the available names. You will be presented with users listed by year first started from high to low. Selecting other user types will present you with all respective names.

**(3) Select the users to be promoted:**

- Select the name of each user you want to promote and click Add.

**(4) Confirm Archiving:**

- If you need to promote user but do not want to archive them, then uncheck the Archive checkbox.
- Select the button to confirm the users to be archived. If the users you have selected are not accurate then select the button to change your selection, or select the CANCEL button to quit the archiving procedure.
- Change the option from Archive to Attending or Fellow. When selecting Attending you will be prompted to select a sub-specialty.

**(5) Final Confirmation:**

- You will be presented with a series of confirmation screens to confirm the users selected for archiving.
- A pop-up page will display the users being archived. Optionally print this page for your records.

*End of Document*