

Event Manager Module

TARGET AUDIENCE: Program Administrator – Lead Resident

This guide is intended for **Program Administrator** and users assigned as **Lead Resident** role, who are responsible for the creation, configuration, oversight, and lifecycle management of events in MedSIS.

These users are expected to use the **Event Manager** module to create, and maintain events, as well as to track attendance and manage data collection.

This guide summarizes key components required to effectively manage events in MedSIS, including:

1. [User roles and access permissions](#)
2. [Navigation to the Event Manager module](#)
3. [Essentials on creating and managing events](#)
4. [Evaluations and Forms in Event Manager Module](#)
5. [Sharing events across programs](#)
6. [Best practices and important notes](#)
7. [Glossary of Terms](#)

1-User roles and access permissions

Access to the Event Manager module is based on the role of the user to avoid data integrity issues:

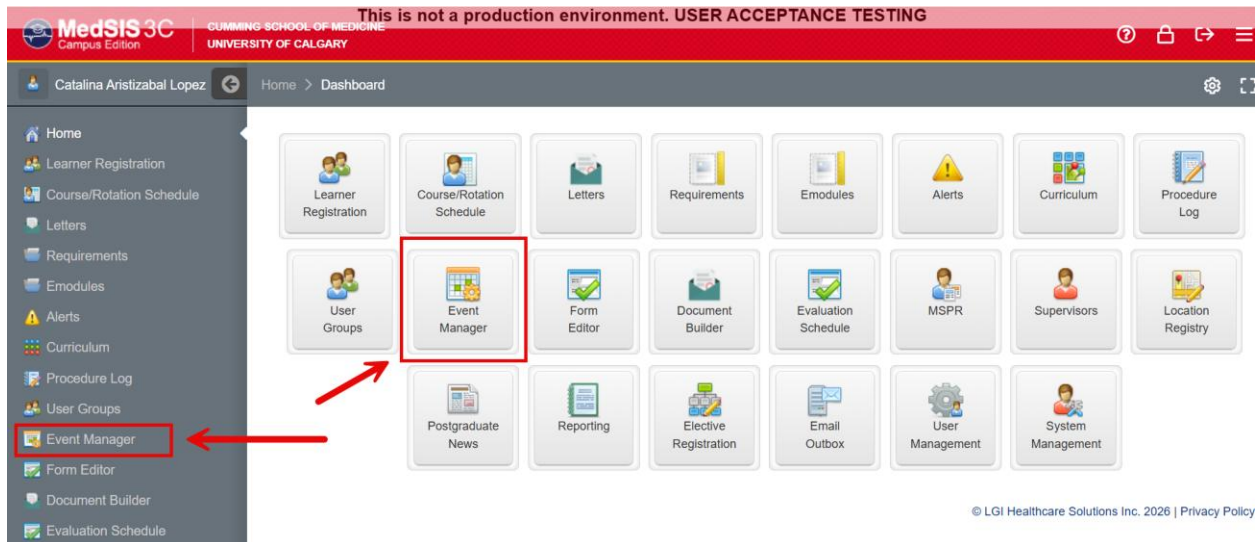
- **Granular Permissions:** MedSIS currently support role-based restrictions within the Event Manager module. The table below shows the permissions configured for the roles that will potentially act as module administrators:

Functions	Program Director	Program Administrator	Lead Resident
Manage Event Templates		✓	
Edit Event types		✓	
Auto - registration		✓	✓
Set Attendance status		✓	✓
Delete templates created by others			
Schedule Events	✓	✓	✓
Delete events created by others			
Send Mail	✓	✓	✓
Print Event details	✓	✓	✓
Event Attendance export	Unenabled		
Manage user groups	Unenabled		

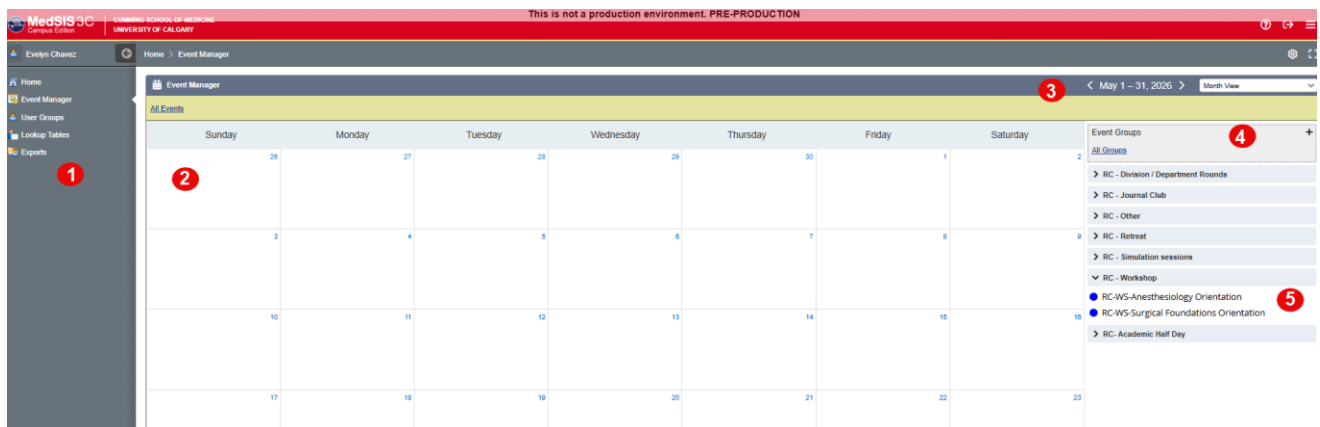
-  **Why This Matters:**
 - Users with access can **modify or delete events**, potentially impacting program workflows and active evaluations.
 - Granting access without proper training can lead to **data loss, misconfiguration, or disruption of clinical and academic processes**.

2-Navigation to the Event Manager Module

Click **Event Manager** from the left-hand navigation menu or from the dashboard.



The **Event Module** page overview:



Item	Description
1 -> Lef-hand Navigation menu	Access User Groups and Exports.
2 -> Event Calendar view	Display events by day and date.
3-> Calendar navigation	Navigate between months or switch views (month, week, day)
4-> Event Type Panel	Use to create event categories.
5-> Event Type detail list	Displays available event templates within each group.

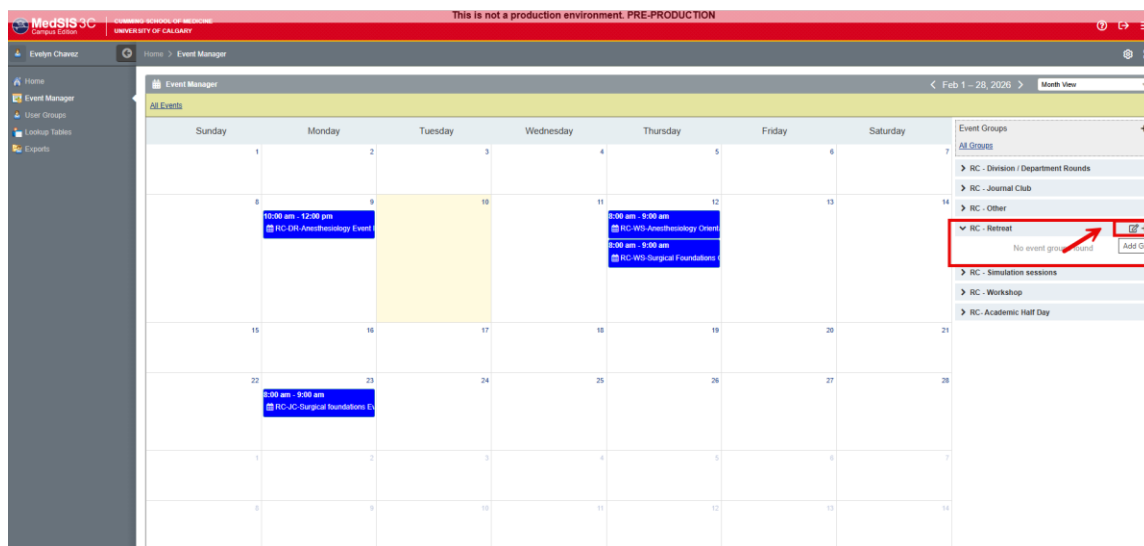
3-Essentials on creating and managing events

In MedSIS, event types are defined and created by the MedSIS Team (See section 5. Best Practices).

These groups are visible across all programs, providing a standardized structure. Each program can then create its own event templates within these groups, tailoring events to their specific needs while maintaining consistency across the system.

3.1 Creating an event template

- 1 For each Event type, an **event template** must be created. To do so, open the group's right-hand menu and click the **Add (+)** icon next to the group name.



The system displays a pop-up window with three tabs: **Event Group**, **Registration Settings** and **Summary**.

- 2 In the **Event Group** tab:



Edit Group

Event Group | Registration Settings | Summary

a. Title: RC-DR-Anesthesiology Event Manager

b. Description: Section to review and discuss recent scientific literature

c. Location: Teams

d. Location Details: Join: https://teams.microsoft.com/join/28615658802216p=Lrn8cy8WUqRZFDk4x Meeting ID: 286 156 588 022 16 Passcode: 3Ru3v2Se

e. Type: RC - Division / Department Rounds

f. Owner: Program: Anesthesiology

g. Category: Evaluation of Event

Color: [Blue dot]

Created by Evelyn Chavez on 09-Feb-2026 16:02
Modified by Evelyn Chavez on 09-Feb-2026 16:26

Save Delete Close

a. **Title:** Enter the event name following the rules described in section 3.1 **Best Practices.**

b. **Description:** Provide a brief description of the event template.

c. **Location / Location detail:** Select the physical or virtual location and enter all required details.

d. **Type** Select the event type that corresponds to the activity.

e. **Owner** Select the program responsible for the event. Optionally, select a

course or rotation if applicable.

Note: It is not possible to create a template shared across multiple programs. Each program must have its own event templates to ensure proper configuration and tracking.

- f. **Category:** Select "Evaluation of event" if you want the system to automatically sends the evaluations form at the end of the event.
- g. **Color** Select a color if needed.
Click **save**.

3 In the **Registrations Settings** tab, the attendees listed as **Participant** and **Presenter** (See section 5. **Best Practices**). For **Participant** attendees, must do:

Edit Group

Event Group **Registration Settings** Summary

Participant

Learner Anesthesiology

Automatically register eligible Participants ☐ OFF

Allow Participant to register ☐ OFF

Automatically set attendance status to Present ☒ ON

Allow Participant to opt out ☐ OFF

Presenter + Add

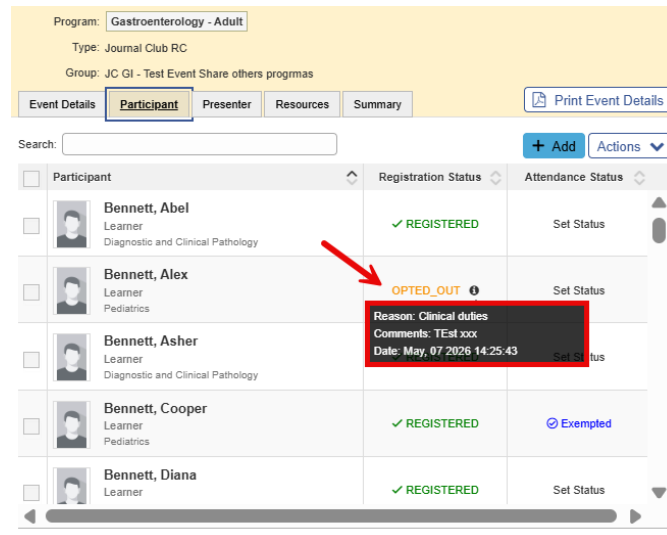
No Presenter specified

- a. **Learner** Click the button to select learners using available filters such as Program, Base location, Training level, Type or Status, Student Group and Course/Rotation Name.
- b. **Registration modes:** Define the registration modes for each type of attendees. Refer to the table below based on the expected outcomes:

Automatically registering eligible participants	Allow Participant to register	Outcomes
ON	OFF	The system automatically adds all learners who are active in the selected program
OFF	ON	The system creates the event with a button that allows each learner to register if they wish to attend (Self-registered)
OFF	OFF	The Program Administrator (PA) or the responsible role must manually add any learners who are required to attend the event.

- c. **Attendance tracker:** Define how attendance will be tracked and specify the status to be applied to attendees who choose to opt out. If the **Automatically set attendance status to Present** option is turned off, attendance for each attendee must be entered manually in the system.

When the **opt Out** option is enabled, the user can define whether participants who choose this option will be marked as **Absent** or **Exempt**. If no option is selected, the system will display the participant status as **opt Out** in the Participants tab. The user will also be able to view the reason for the opt out and manually modify the attendance status as needed by clicking **Set Status**.



Program: Gastroenterology - Adult
Type: Journal Club RC
Group: JC GI - Test Event Share others progmars

Event Details **Participant** Presenter Resources Summary [Print Event Details](#)

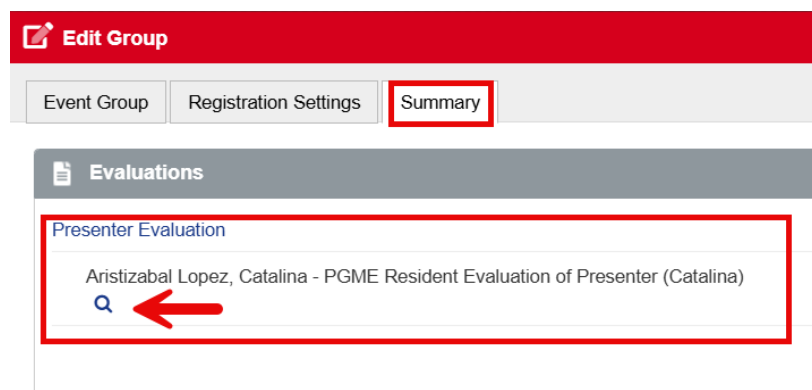
Search: [+ Add](#) [Actions](#)

Participant	Registration Status	Attendance Status
☐ Bennett, Abel Learner Diagnostic and Clinical Pathology	✓ REGISTERED	Set Status
☐ Bennett, Alex Learner Pediatrics	OPTED_OUT ⓘ	Set Status
☐ Bennett, Asher Learner Diagnostic and Clinical Pathology	Reason: Clinical duties Comments: Test xxx Date: May, 07 2026 14:25:43	Set Status
☐ Bennett, Cooper Learner Pediatrics	✓ REGISTERED	Exempted
☐ Bennett, Diana Learner	✓ REGISTERED	Set Status

- d. **Presenter view** not configuration is required. Leave the default settings as displayed by the system.
Click **save**.

Note: When the user selects the Self-registration option, the system does not allow notifications to be sent within the Event Manager module until participants have completed their self-registration. Please refer to section 3.4 for more details about this functionality.

- 4** Finally in the **Summary** tab, the system displays the **Evaluation Form** configured for the presenter and event. Click the **Preview** icon to view the detailed form.



[Edit Group](#)

Event Group Registration Settings **Summary**

[Evaluations](#)

[Presenter Evaluation](#)

Aristizabal Lopez, Catalina - PGME Resident Evaluation of Presenter (Catalina)

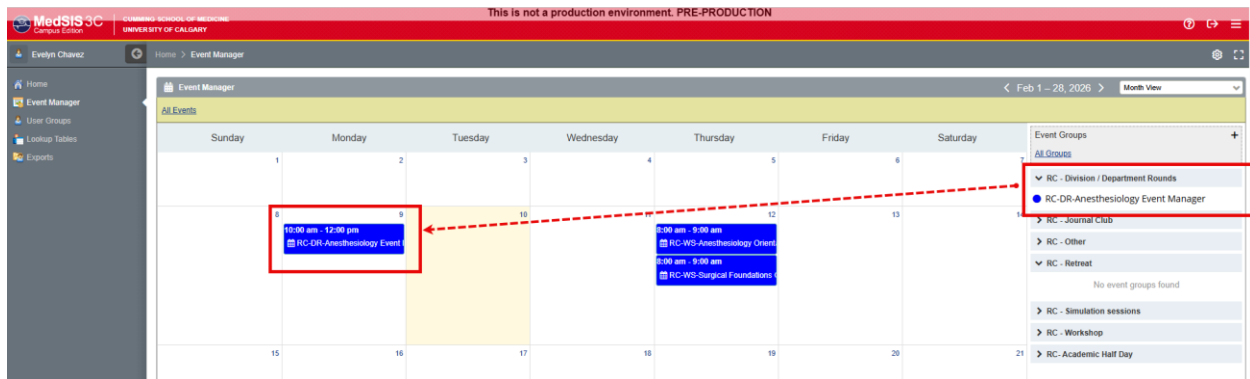
[Q](#)

3.2 Scheduling an Event

1 Schedule an event using a template: An event can be scheduled using one of the following methods:

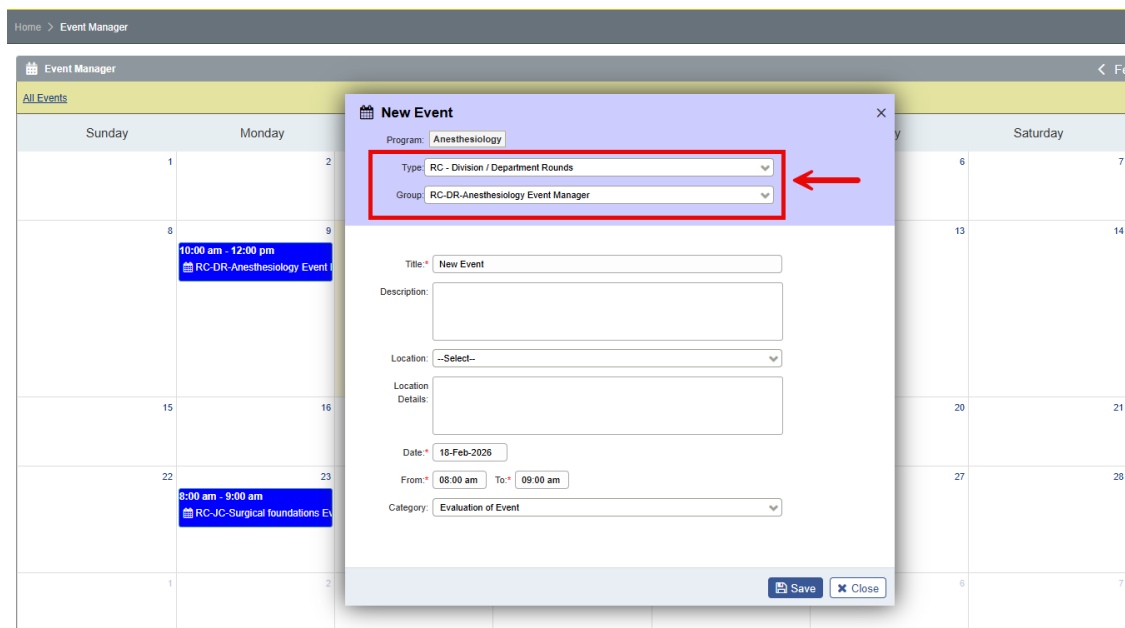
1.1 Drag and drop:

- In the **Event Manager** calendar, locate the template in the **Event types** panel (right-hand side).
- Drag the template and drop it onto the desired date in the calendar.



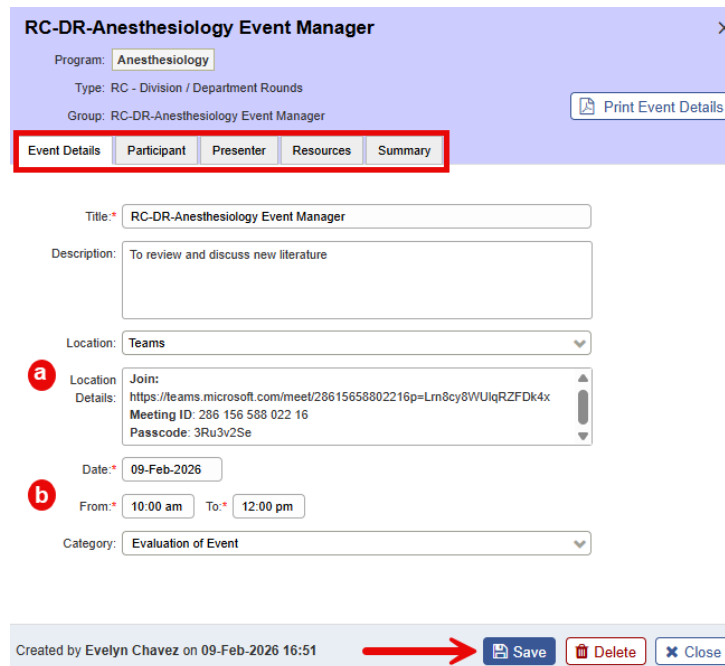
1.2 Schedule from the Calendar:

- Click directly on the desired date in the calendar.
- In the New Event window, **select the Event Type and Event Template** corresponding to the template you want to use.



After creating the event, complete the remaining tabs: Event details, Participant, Presenter, Resources and Summary.

- 2** In the **Event Details** tab, review and modify the preconfigured settings and add or update the event date, time and category (items a and b), as shown in the image:



RC-DR-Anesthesiology Event Manager

Program: Anesthesiology
Type: RC - Division / Department Rounds
Group: RC-DR-Anesthesiology Event Manager

[Print Event Details](#)

Event Details | Participant | Presenter | Resources | Summary

Title: RC-DR-Anesthesiology Event Manager

Description: To review and discuss new literature

Location: Teams

a Location Details: Join: <https://teams.microsoft.com/join/28615658802216p=Lm8cy8WUqRZFDk4x>
Meeting ID: 286 156 588 022 16
Passcode: 3Ru3v2Se

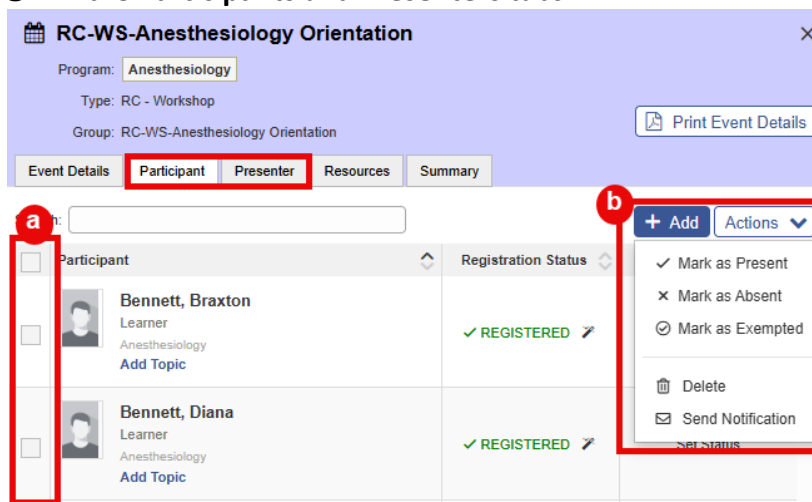
Date: **b** 09-Feb-2026

From: 10:00 am To: 12:00 pm

Category: Evaluation of Event

Created by Evelyn Chavez on 09-Feb-2026 16:51 [Save](#) [Delete](#) [Close](#)

- 3** In the **Participants** and **Presenters** tabs:



RC-WS-Anesthesiology Orientation

Program: Anesthesiology
Type: RC - Workshop
Group: RC-WS-Anesthesiology Orientation

[Print Event Details](#)

Event Details | **Participant** | **Presenter** | Resources | Summary

a

Participant	Registration Status
☐ Bennett, Braxton Learner Anesthesiology Add Topic	✓ REGISTERED ✎
☐ Bennett, Diana Learner Anesthesiology Add Topic	✓ REGISTERED ✎

b

[+ Add](#) [Actions](#)

- ✓ Mark as Present
- ✗ Mark as Absent
- ⊙ Mark as Exempted
- 🗑 Delete
- ✉ Send Notification

a. Select the participant or presenter whose attendance needs to be modified or who requires a notification.

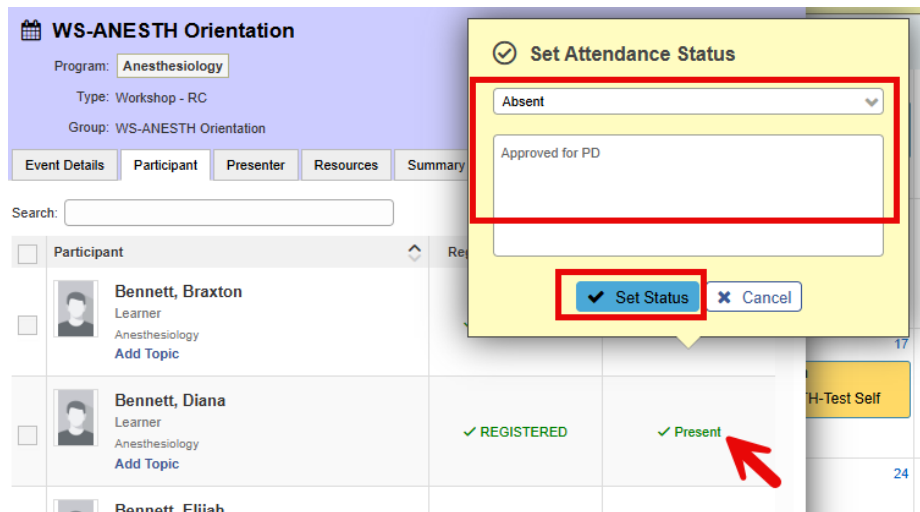
b. Add or remove new participants or presenters, update attendance status, and send notifications as needed

Note: If the option “Automatically set attendance status to Present” is enabled, the system automatically runs

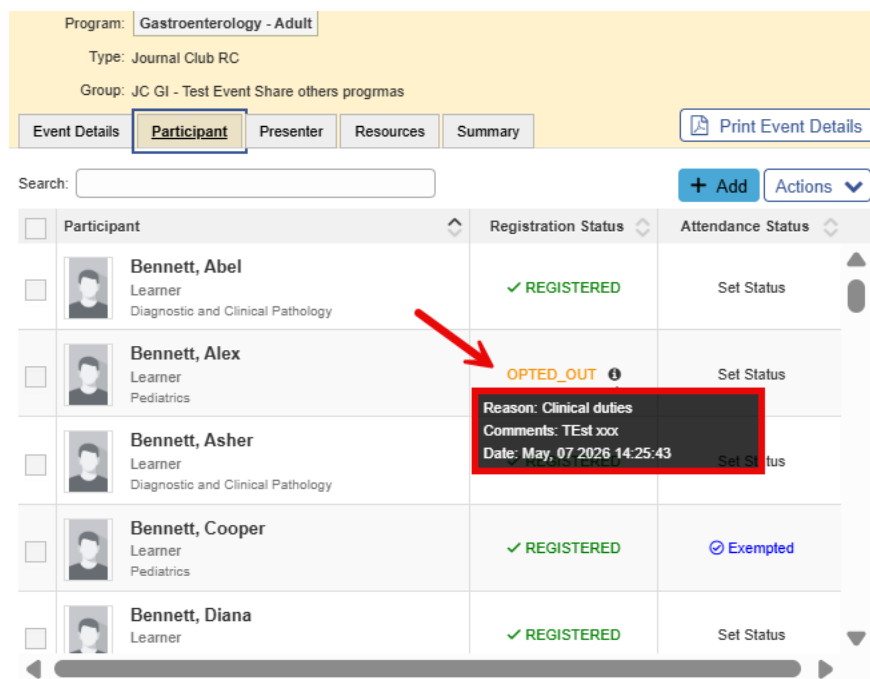
overnight and automatically marks all participants as *Present*. The user only needs to update the status for learners who were not present.

How to modify attendance status and add comments:

When the user needs to update the attendance status for one or more participants, they must select the participant(s) and, from the Actions button, choose the appropriate status. If comments need to be added, the user should click on the attendance status; the system will display a new window where the user can enter the necessary comments and then click Set Status.



Additionally, if a participant uses the Opt Out option, the user will be able to view the comments provided by the participant and update the attendance status accordingly to reflect the information submitted.



Once the event details are printed, the user will be able to view the comments that were added.



Event: JC GI - Test Event Share others programas
Event Type: Journal Club RC
Date: 14-May-2026 08:00 AM - 09:00 AM
Location: Hybrid Teams [HTEAMS]
https://youtu.be/3mFF8lt-oG8?si=nPiN_GxXuvmRNz5c

Participant

Nr	Name	Email	Status	Comments
1	Bennett, Abel	abel.bennett.42071@medsis3c.com	Absent	Approved PD
2	Bennett, Alex	alex.bennett.42065@medsis3c.com	Exempted	Opt out Clinical Duties
3	Bennett, Asher	asher.bennett.42097@medsis3c.com		
4	Bennett, Cooper	cooper.bennett.42093@medsis3c.com	Exempted	
5	Bennett, Diana	diana.bennett.42076@medsis3c.com		

RC-WS-Anesthesiology Orientation
×

Program: Anesthesiology
Type: RC - Workshop
Group: RC-WS-Anesthesiology Orientation

Print Event Details

Event Details Participant Presenter **Resources** Summary

Drop files or click to upload

4 In the **Resources** tab, upload or drag and drop files and materials related to the event.

5 Finally, in the **Summary** tab, review the evaluation form that the system will send to assess the event and the presenter.

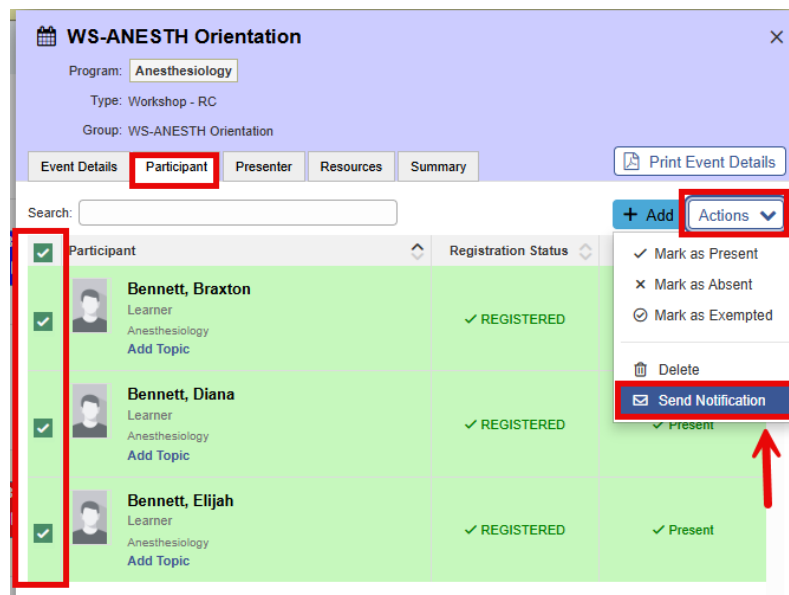


Once all information has been reviewed, click **save** in the **Event details**.

3.3 Send notifications and create templates notifications

Sending notifications: The user can send email notifications to event participants and presenters. To use this functionality, the user must:

- Select one or more participants/presenters by checking the box located to the left of their name.
- Go to the **Actions** option and click on **Send Notifications**.



The system will open the **Compose Email** window, where the user can enter the information, they wish to share and then click **Send**.

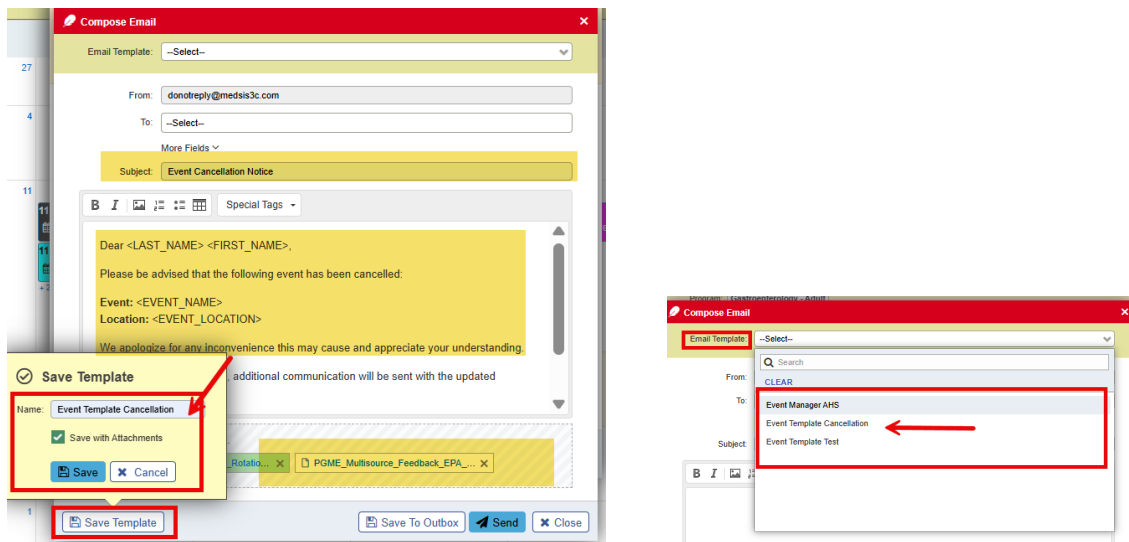


Note: When the user selects the Self-registration option, the system does not allow notifications to be sent within the Event Manager module until participants have completed their self-registration.

Creating a Notification Template: Users can create notification templates to facilitate the communication of relevant information related to specific events. For example, templates can be created to notify participants when an event is cancelled, when the location changes, or to communicate any other important or time-sensitive information about the event.

To create a notification template, the user must:

1. Navigate to the Participants or Presenters screen.
2. From the Actions button, select Send Notification.
3. In the pop-up window:
 - o Enter the email Subject.
 - o Add the content of the email template to be used.
 - o Attach files if required.
4. Click Save Template.
5. Enter a name for the template.
6. Select the Save with attachment checkbox if attachments should be saved as part of the template.
7. Click Save.
8. After saving, verify that the system displays the newly created template in the Email Template field within the pop-up window.



Note: Since the system allows all programs to view templates created by other programs, we recommend using the following naming convention for templates:

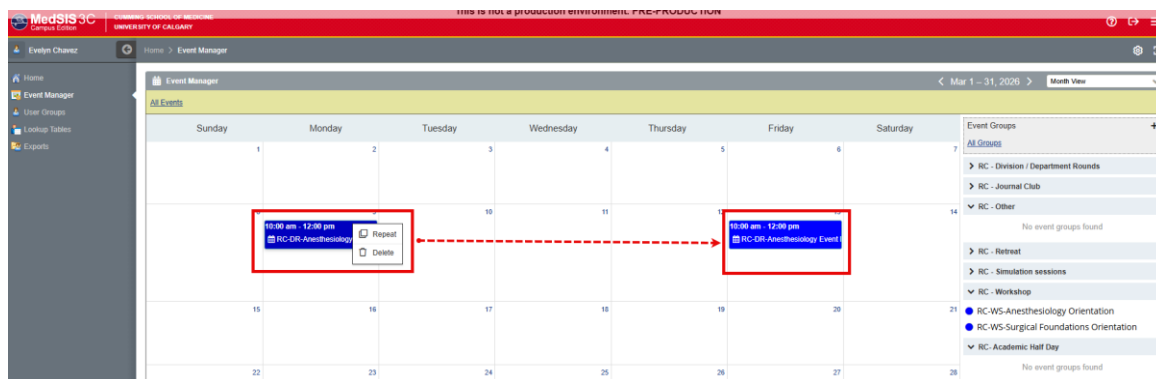
[Program Code] [Template Short Name]

Examples:

- ANESTH AHD Reminder Current Week
- NEURO Resident Reminder DMP AHD
- NEUROSX Rotation Evaluation Reminder

3.4 Duplicate, Delete and cancel scheduled events

- Duplicate:** Once an event has been created, it can be duplicated for different dates. To do this, right-click on the event, select Repeat, and choose the appropriate option to recreate the event.
- Delete:** To delete an event, follow the same steps explain before and select Delete.



Note:



- A duplicated event retains all the features and settings of the original event. Users should review the duplicated event to confirm whether any information needs to be updated.
 - If a duplicated event in the middle of the series is deleted, the system will prompt you with the option to delete all future events that follow it.
- c. **Cancel:** the system does not include this functionality. To cancel an event, the program must first send an email notification to participants and then delete the event from the calendar.

The screenshot displays the 'RC-WS-Anesthesiology Orientation' event management interface. On the left, a list of participants is shown with checkboxes and registration status. On the right, a calendar view shows the event details and a 'Repeat' button.

3.5 Printing events

Users can print and share event details if needed.

- Click the event directly on the calendar. A dialog box opens.
- Click Print Event Details button.
- A new tab opens displaying the event details in PDF format.
- Print the document if required.

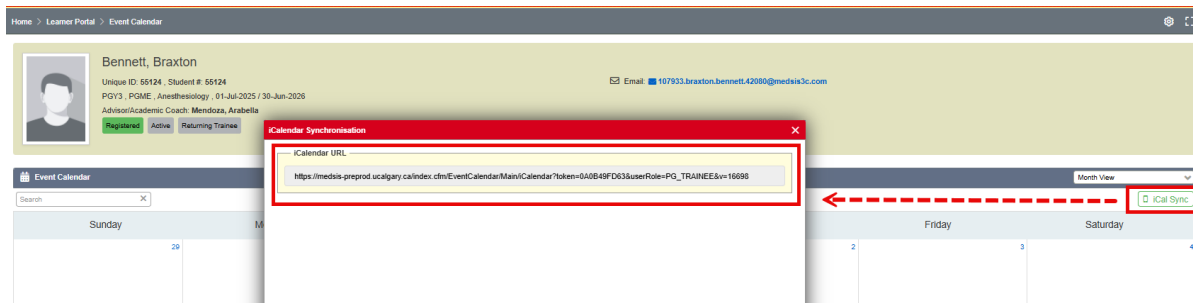
The screenshot shows the 'RC-WS-Anesthesiology Orientation' event details dialog box. A red arrow points to the 'Print Event Details' button.

3.6 Synchronizing events with a personal calendar

Users without administrative roles (Learner and Supervisor) can synchronize their events with their personal calendar using the iCalendar (iCal) link.

To sync your calendar:

1. **Go to iCal Syn button** in the top-right corner
2. **Copy the link**
3. Follow the steps for your calendar platform:



Google Calendar (Desktop)

1. Open Google Calendar in a web browser.
2. In the left panel, locate other calendars and click the + (plus) icon.
3. Select From URL.
4. Paste the iCalendar link.
5. Click Add calendar.

Apple Calendar (iPhone or iPad)

1. Open the Calendar app.
2. Tap Calendars at the bottom of the screen.
3. Tap Add Calendar.
4. Select Add Subscription Calendar.
5. Paste the iCalendar link.
6. Tap Subscribe.

Outlook (Desktop or Web)

1. Open Outlook Calendar.
2. Select Add calendar or Import calendar.
3. Choose From Internet.
4. Paste the iCalendar link.
5. Name the calendar and click OK or Import

4-Evaluations and Forms on Event Manager Module

The Events module supports two types of evaluations: Event and Presenter. These evaluations can be generated separately or together, depending on the program's requirements.

To trigger the evaluations in the system, the following conditions must be met according to the type of evaluation, as summarized in the table below:

Type of Evaluation	Check Category field	Check Participants as Present	Presenter Added
Event	✓	✓	
Presenter		✓	✓
Event + Presenter	✓	✓	✓

Notes:

- **Event Evaluation:** Triggered when the category field is checked and participants are marked as present.
- **Presenter Evaluation:** Triggered when participants are marked as present and a presenter is assigned.
- **Event + Presenter Evaluation:** Triggered when all three conditions are met.

The evaluation forms used for assessing the event and the presenters are standardized and are the same across all programs. PGME has developed the following evaluation types:

Evaluation name	Focus of evaluation	Event Type to use for
Academic Half Day	Presenter	Academic Half Day
Journal Club	Presenter	Journal Club
Division Rounds	Presenter	Division Rounds
Program Event	Event	Other, Conference and Special Event

When the user schedules an event, they must **select Category** in the event details tab for the system to **trigger** and **event evaluation**

These evaluation forms and the evaluation schedule setup are created by MedSIS team. Once the MedSIS team has created and published forms in MedSIS, they can be used in the **Evaluations Setup**.

5-Sharing events across programs

MedSIS does not support direct event sharing between programs. The system is configured so that each event template can only have one owning program. As a result, programs cannot independently access or manage event information that belongs to another program.

When an event must include participants or presenters from multiple programs, the following process must be followed:

- One program must create the event template.
- The owning program must then submit a ServiceNow ticket requesting that additional programs be added to the event template.
- The PGME Event Administrator will review the request and add the specified programs to the template.

Once the PGME Event Administrator completes the process:

- The program that created the event template (the owner program) will be responsible for scheduling events using that template, including participants and presenters from the added programs.
- The owner program will have full access to manage the event, including:
 - Editing and deleting the event
 - Updating attendance
 - Sending notifications to all participants and presenters
- Administrators from the added programs will only be able to view the event in their calendars and will not have permission to edit or delete the event.
- All participants and presenters included in the shared event will retain full MedSIS functionality, including calendar visibility and access to event-related information.

Process for sharing an event

- a. Create the Event Template: One of the participating program administrators must create the event template (owner).
- b. Submit a ServiceNow Ticket: After the event template has been created, submit a ServiceNow ticket requesting the addition of other programs. Include the following information in the ticket:
 - Event Template name
 - Event Type
 - Program that created the event
 - List of other programs to be added
- c. PGME Event Administrator Review: The PGME Event Administrator will complete the process within MedSIS and notify all participating programs once the updates are completed.
- d. Schedule an event: The program administrator owner of event template will schedule an event including participants and presenters for the other programs. Attendance Management: Attendance tracking and updates remain the responsibility of the administrator from the owner program, as administrators from other programs do not have edit or modification permissions.

Note: It is recommended to use the Self-Registration mode when sharing non-mandatory events, as it allows residents to register themselves directly for the event.

6-Best Practices and important Notes

As the Event Manager module provides broad functionality and access, clear internal controls are required to mitigate risk and ensure consistency across programs. These best practices are especially important in environments involving multiple departments or units (e.g Royal College (RC), Family Medicine (FM), Undergraduate Medical Education (UME)).

6.1 Best Practices

- Limit access** to trained staff familiar with MedSIS and Event Manager workflows
- Maintain** and **regularity** review a list of users with Event Manager access.
- Use **naming conventions** to track the **Types of events**. The name group should be clear, descriptive, and human-readable. Event type names are visible to users when creating events and must provide context. Since all users see the same names and groups, consistent and descriptive naming helps ensure clarity and prevents miscommunication across the system.

Event Type	Unit	Code
Academic Half Day	RC – UME – FM	AHD
Journal Club	RC – UME – FM	JC
PGME Workshop	RC	WS
Division/Department Rounds	RC – UME – FM	DDR
Conference	RC – UME – FM	RT
Special Event	RC – UME – FM	SE
Other	RC – UME – FM	OT

[Event Type name] (examples/list of common options):

- Academic Half Day
- Journal Club
- Conference
- Division/Department Rounds
- PGME Workshop
- Special Event
- Other

[Unit CODE] (examples/list of common options):

- RC - Royal College
- UME - Undergraduate Medical Education
- FM - Family Medicine

Naming rule example for Events template:

[Event Group/Type] Academic Half Day, Journal Club, Conference, Division Rounds, Other, Special Events, PGME Workshop [Unit Code] RC, UME, FM

Examples:

Academic Half Day RC

Journal Club RC

Academic Half Day UME

Academic Half Day FM

- d) Use **naming conventions** and internal documentation to track the **events Templates**. The name should be clear, descriptive, and human-readable. Format example: [Event Type Code] – [Program Code] – [Event Name]

[Event Group/ Type CODE] (examples/list of common options):

- AHD - Academic Half Day
- JC - Journal Club
- WS - Workshop
- DDR - Division/Department Rounds
- RT - Retreat
- SS - Simulation sessions
- OT - Other

[Program CODE] (examples/list of common options):

- ANESTH

[Target event name] (examples/list of common options):

- Different event names

Naming rule example for Events template:

[Event type code] Academic Half Day, Journal Club, Workshop, Division Rounds, Simulation sessions, Other
[Program code] ANESTH, NEURO, NEUROSX [Short name of event] Airway Management Update

Examples:

JC ANESTH Airway Management Update

OT NEURO Orientation

AHD NEUROSX Perioperative Neurosurgery Updates

WS NEUROSX Cerebrovascular Surgery Advances

- e) In Event group setup, **define the type of attendees** as:
- Participants→ Eligible roles: Learner + Supervisor
 - Presenter→ Eligible roles: Learner + Supervisor
- f) The system supports three registration modes:
- Self-registration: Learners register themselves.



- Automatic Registration: All active learners are registered automatically.
- Manual registration: Attendance is entered manually by the responsible user.

Search:

[+ Add](#) [Actions](#)

☐	Participant	Registration Status	Attendance Status
☐	 Bennett, Braxton Learner Anesthesiology	Auto Registered ✓ REGISTERED 	Present 

Self-registration is recommended to simplify daily operations and supports attendance tracking and evaluations process.

6.2 Important Notes

Please read carefully the following important notes before you start working with the Event Manager Module:

- Event cancellation is not supported. Cancellation instructions are described before in this guide.
- When schedule an event, a Category field must be selected to enable evaluations in the event details tab.
- Evaluation forms are standardized across all programs (**See section 4. Evaluations and forms**).
- If “Automatically set attendance status to Present” is enabled, participants will be marked as present automatically, and the relevant evaluation triggers will run accordingly.
- Evaluations will be automatically triggered when the following conditions are met:
 - **Event Evaluation:** When the **Category** field is checked and participants are marked as **Present**.
 - **Presenter Evaluation:** When participants are marked as **Present** and a **Presenter** is assigned.

7-Glossary of Terms

Term	Definition
Absent	Attendance status indicating that the participant did not attend the event.
Attendance Status	The attendance condition assigned to a participant for an event (e.g., Present, Absent, Exempted).
Attendance Tracker	A system feature used to record and manage participant attendance for an event.
Automatic Registration	A registration mode where the system automatically registers eligible learners for an event.
Automatically Set Attendance Status to Present	A system setting that automatically marks all registered participants as Present after the event.
Event	A scheduled activity created in the Event Manager calendar using an event template
Event Attendance Status Export	A system export that generates attendance status data for events.
Event Evaluation	A standardized evaluation used to assess the overall quality and effectiveness of an event.
Event type	A logical classification used to organize events by activity type and apply standardized configuration and templates.
Event template	A predefined configuration used to create events, including event details, roles, registration settings, and evaluations.
Evaluation Form	A standardized form used to collect feedback for events or presenters.
Evaluation Schedule	A configuration that defines when and how evaluation forms are distributed to users.
Evaluation Setup	The process of configuring evaluation details and scheduling evaluations in the system.
Evaluation Trigger	A system condition that activates the distribution of evaluation forms after an event.
Evaluation Type	The category of evaluation applied, such as Event Evaluation or Presenter Evaluation.
Evaluators	Users who complete and submit evaluation forms.
Evaluates	Users or entities being assessed through evaluation forms.
Exempted	Attendance status indicating that the participant was excused from attending the event.
Learner	A user enrolled in a program who participates in events and completes evaluations.



Manual Registration	A registration mode where an authorized user manually registers learners for an event.
MedSIS	The Medical Student Information System used to manage rotations, evaluations, and forms.
Owner	The program responsible for managing an event.
Participant	A role assigned to learners attending an event and whose attendance and evaluations are tracked.
PGME (Postgraduate Medical Education)	Unit responsible for residency training programs.
Presenter	A role assigned to supervisors or instructors responsible for delivering content during an event.
Presenter Evaluation	A standardized evaluation used to assess the performance of presenters during an event.
Present	Attendance status indicating that the participant attended the event.
RC (Royal College)	Unit responsible for Royal College programs.
Role eligible	A system-defined role that determines which users can be assigned to a specific event role.
Self-registration	A registration mode that allows learners to register themselves for an event.
Student Groups	A type of user group that organizes learners by program, course, or rotation.
Supervisor	A user responsible for teaching, presenting, or supervising learners during an event.
System Administrator (SA)	User role with full control over all forms and configurations within MedSIS.
UAT (User Acceptance Testing)	A non-production environment where new functionality is enabled and system configuration tested.
UME (Undergraduate Medical Education)	Unit responsible for undergraduate medical programs.
User Groups	Administrative groups used to organize users for filtering, reporting, or event management.

