MedSIS Training For PA/PD/CC Chair For Fall 2024 Session 2

The University of Calgary, located in the heart of Southern Alberta, both acknowledges and pays tribute to the traditional territories of the peoples of Treaty 7, which include the Blackfoot Confederacy (comprised of the Siksika, the Piikani, and the Kainai First Nations), the Tsuut'ina First Nation, and the Stoney Nakoda (including Chiniki, Bearspaw, and Goodstoney First Nations). The City of Calgary is also home to the Métis Nation of Alberta (Districts 5 and 6).

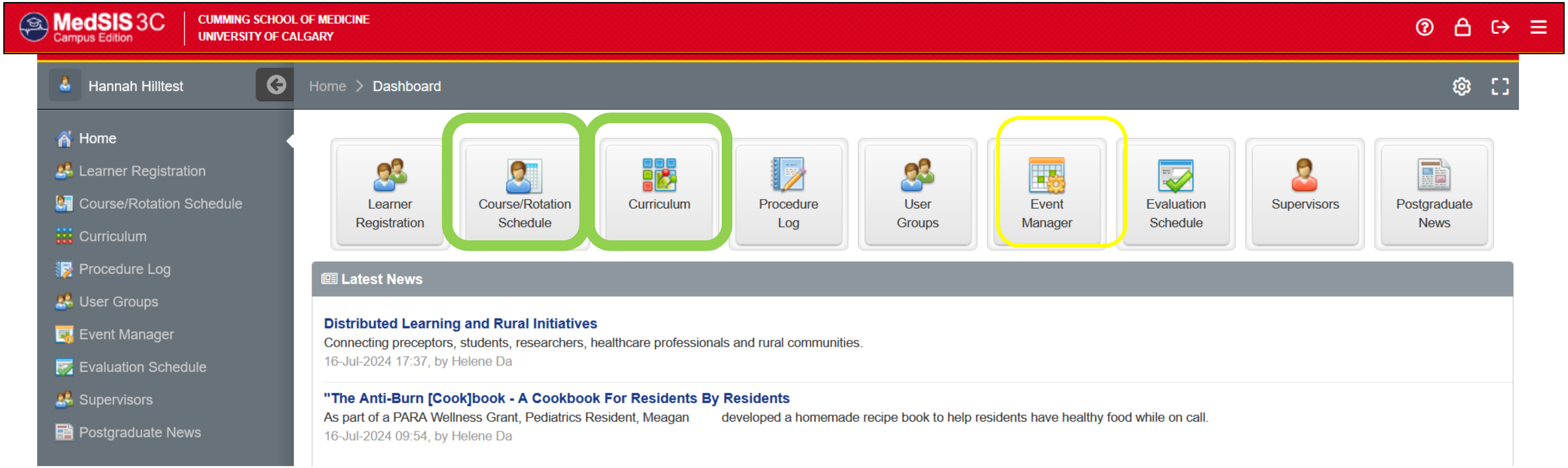
Agenda

- User Groups – managing your CC membership
- Academic Coach – managing your AA and assigning them to residents
- Setting up a Competence Committee meeting in the system
- Break
- Rotation Schedule Module
- Sneak peak at Events Module (time permitting)

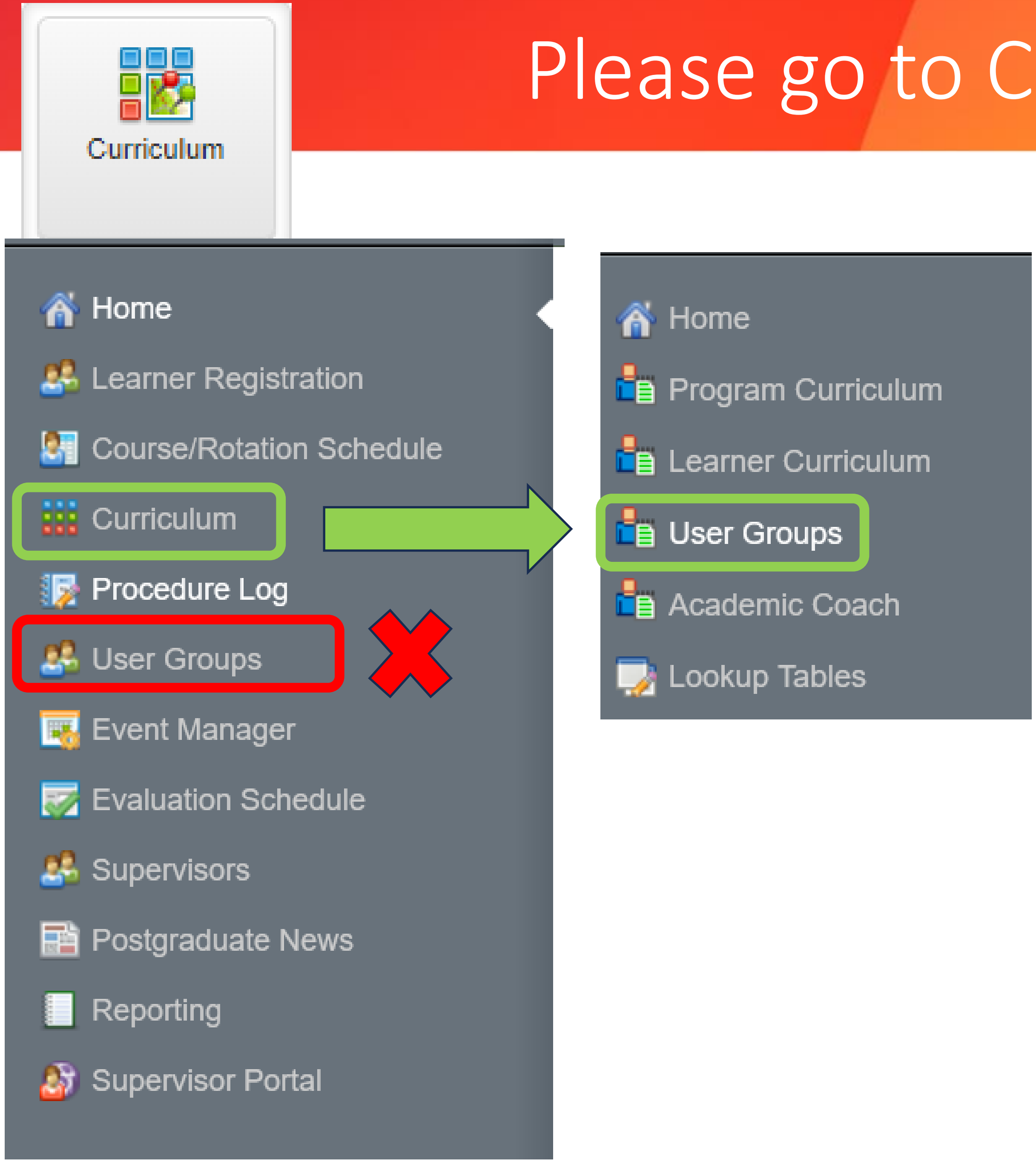
Detailed Agenda

1300-1310	Welcome and Housekeeping
1310-1320	User Groups – managing CC membership – with time to explore
1320-1330	User Groups – managing AA membership – with time to practice
1330-1350	How to configure your CC meetings
1350-1400	Live Demo configure CC meeting
1400-1410	Practice configuring CC meeting
1410-1425	BREAK
1425-1435	Rotation Schedule Lookup Tables – with time to explore
1435-1450	View Schedules from Learner Perspective – with time to practice
1450-1500	View Schedules from Rotation Perspective – with time to practice
1500-1510	Viewing Rotation Details – with time to practice
1510-1525	Editing a Rotation Schedule – with time to practice
1525-1535	Registration Module – with time to practice
1535-1545	Event Module
1545-1550	Wrap up / Questions

Landing Page (Admin Portal)

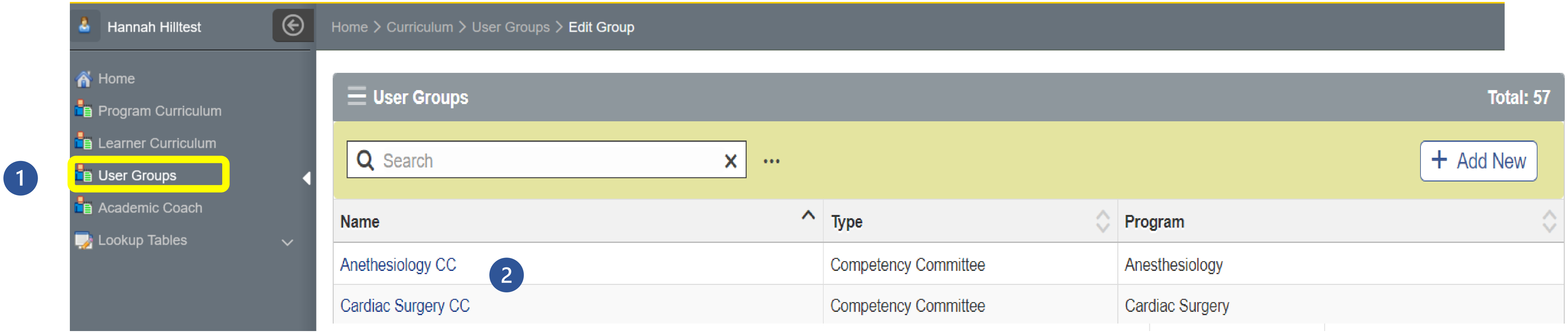


Please go to Curriculum > User Groups



User Groups

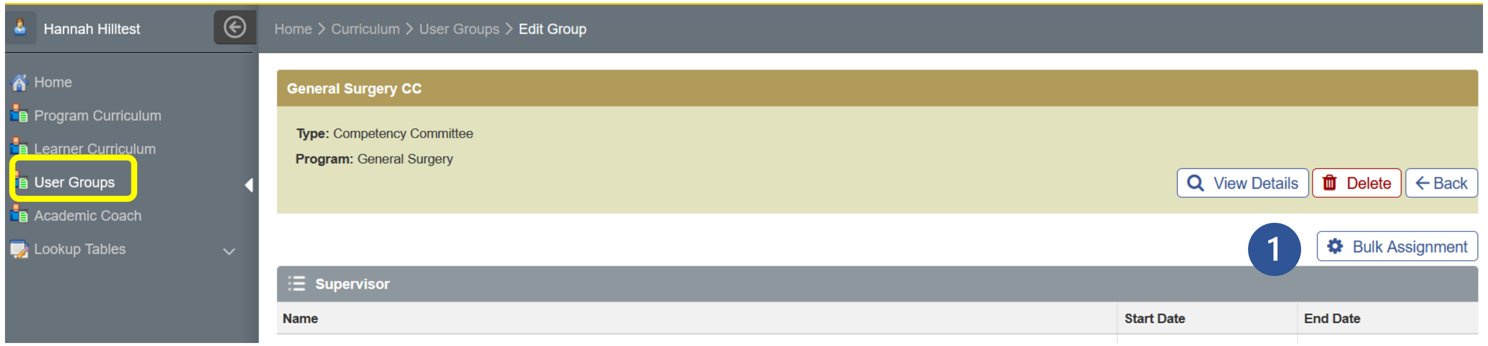
Viewing your CC membership

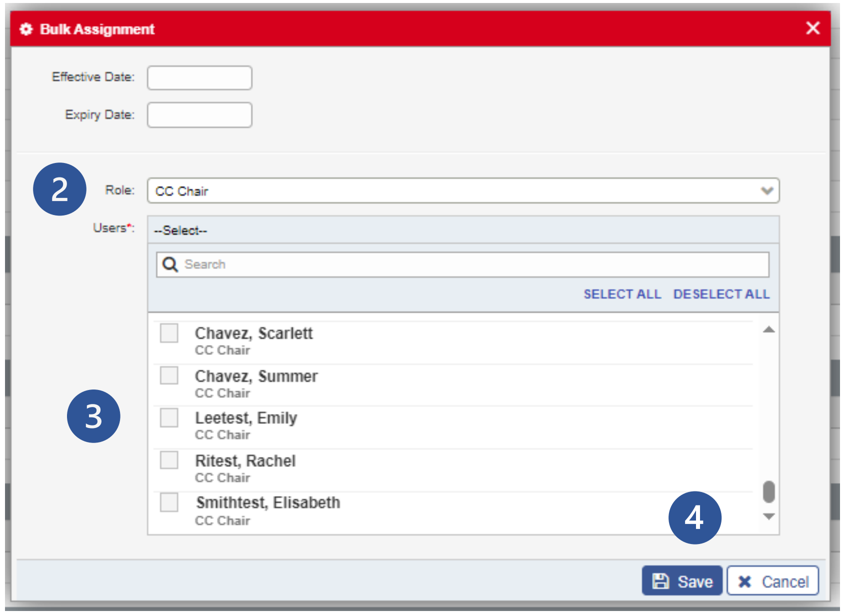


1. In the Curriculum Module, go to User Groups
2. Your available committees will be listed – select a Competence Committee

Curriculum > User Groups
Managing your Competence Committee Membership

- Competence committee members listed by their other roles in the system: supervisors, PDs, PAs, CC Chair
- *If they have no other role in the system they are listed as External members*





Adding a member:

1. Click Bulk Assignment
2. Select role (for your program)
3. Select Name (if name is not visible, the user doesn't have the correct role relative to this program or is already a CC member
4. Click Save

Deleting a member:

Click on their name
Click "delete"

DEMO – managing CC members

- Add a member
- Remove a member

1

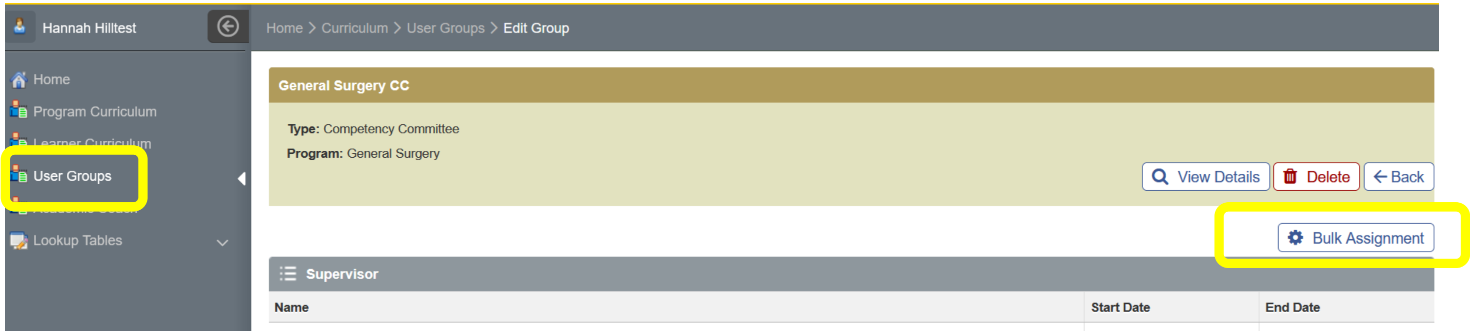
PRACTICE

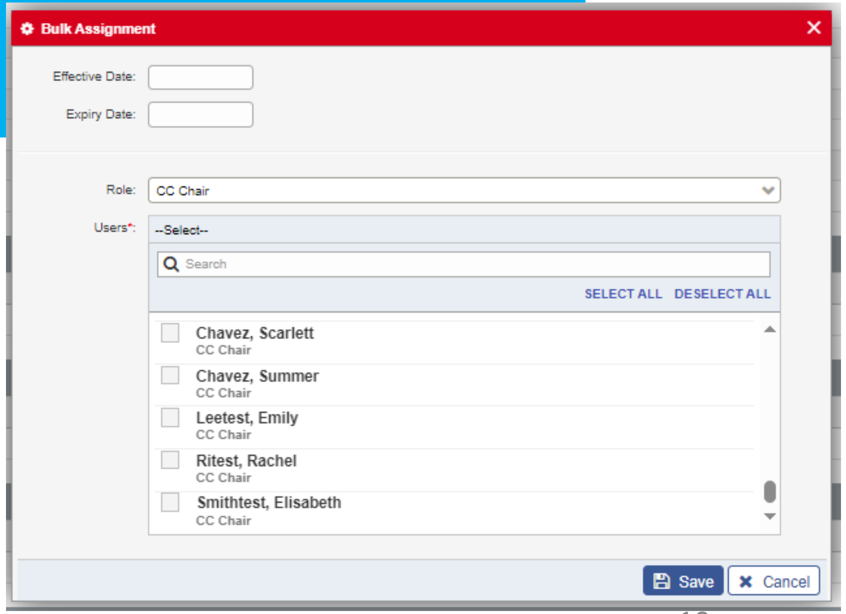
Review your CC membership

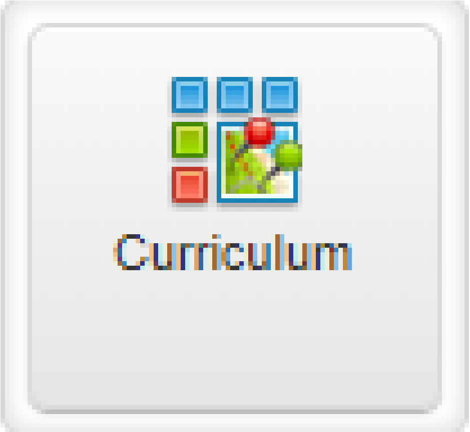
(Not correct? – you can update after go-live)

Add a CC member

Remove a cc member

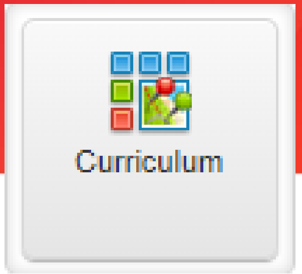


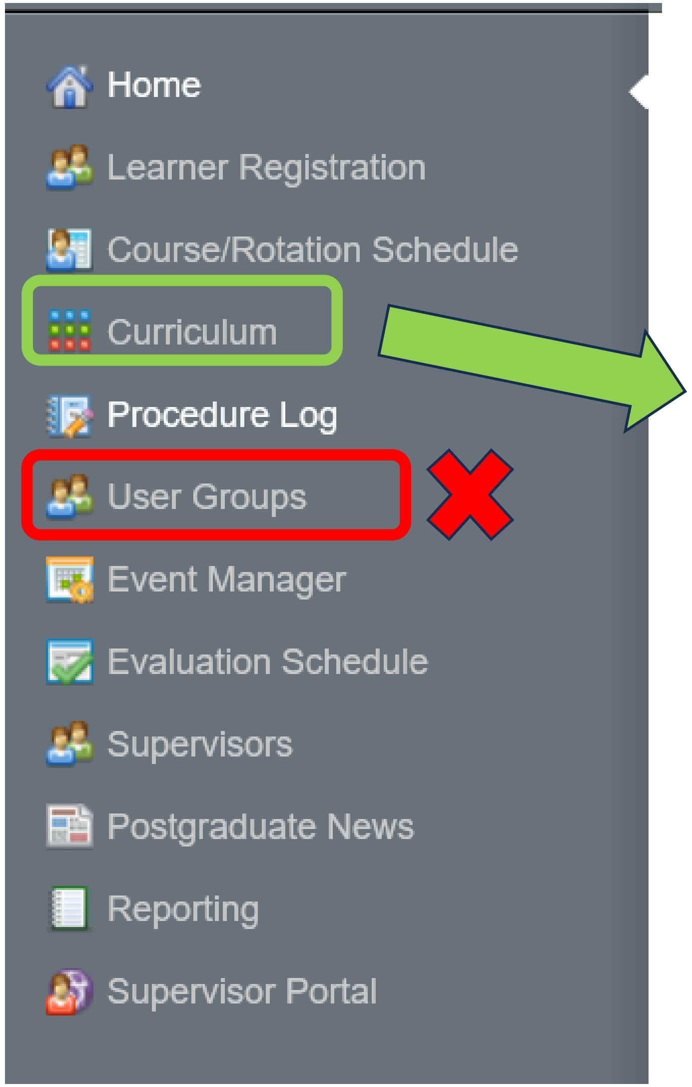


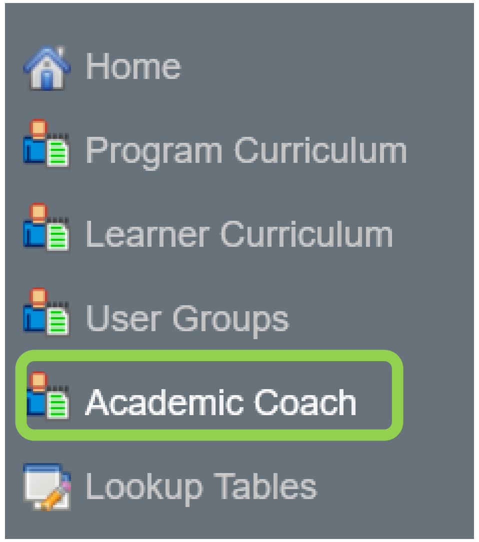


Academic Coach

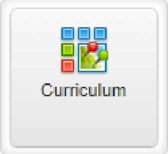
Please go to Curriculum > Academic Coach





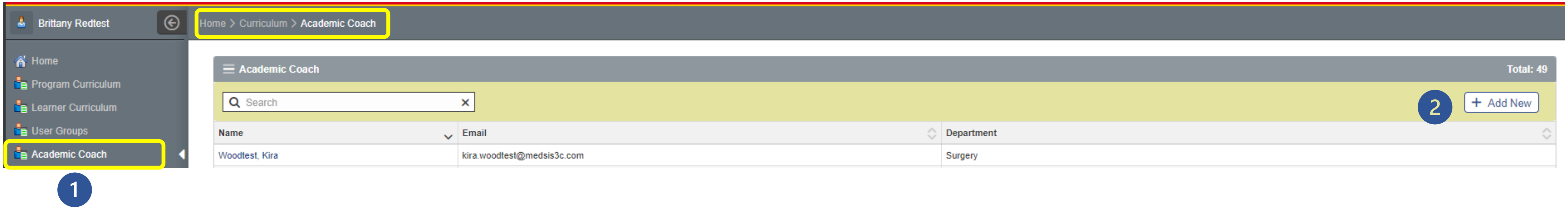


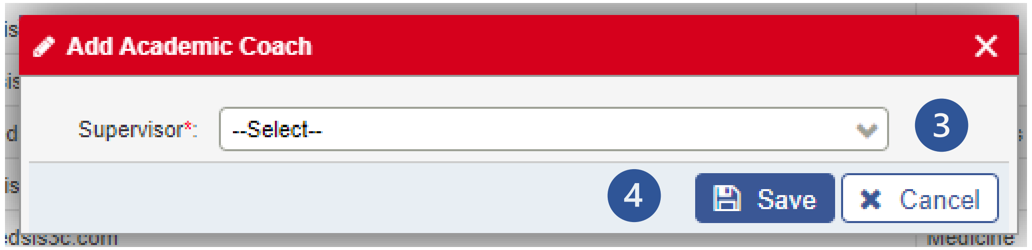
Academic Coach



Give a Supervisor an Academic Coach Role

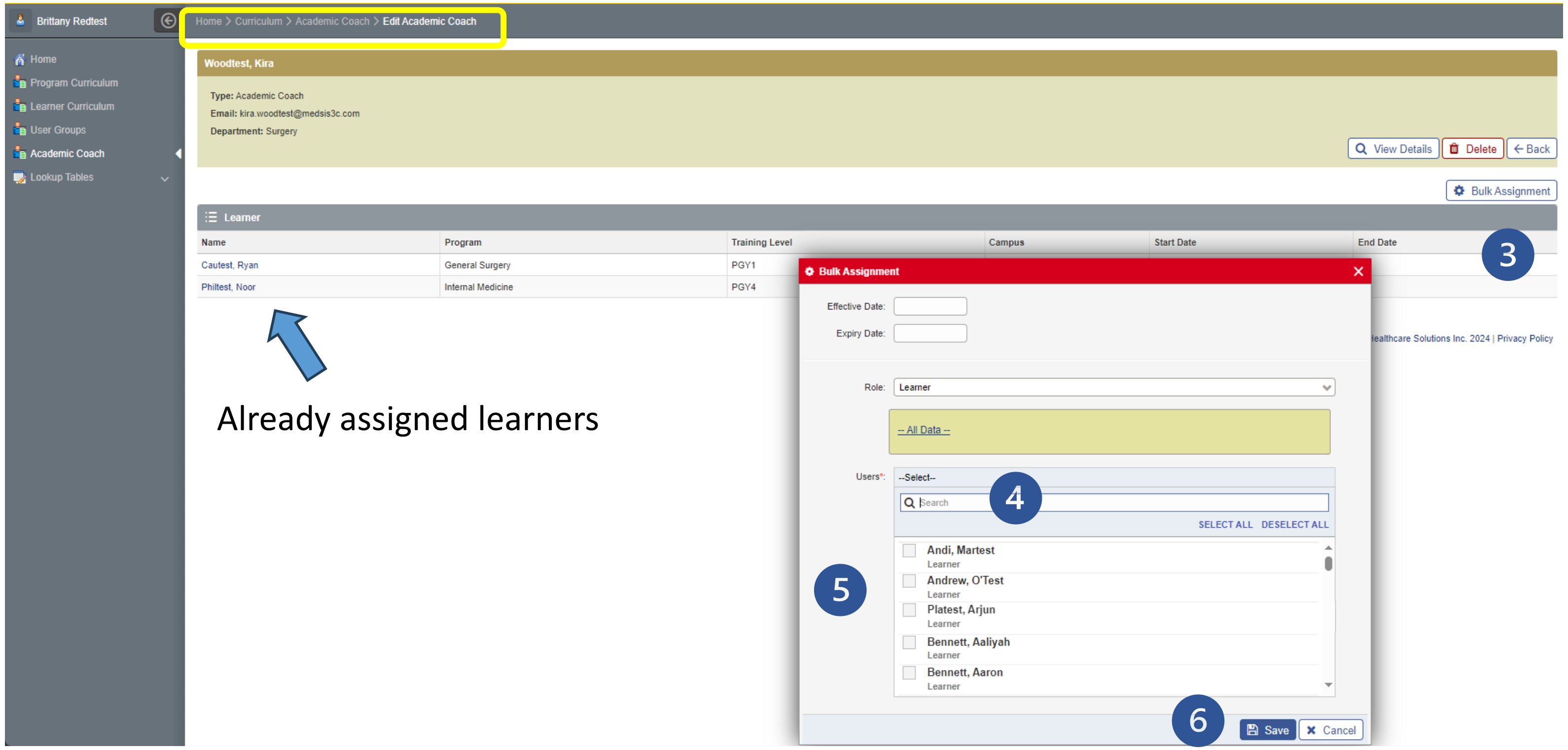
A supervisor must be given the Role of an Academic Coach before they can be assigned a resident





1. Go to **Curriculum > Academic Coach**
   (will see list of all Supervisors who do not have Coach role)
2. Click on **Add New**
3. Select the Supervisor
   If the Supervisor is not on the list: the supervisor already has the Academic Coach role and Learners can be assigned to them, OR the Supervisor is not registered in MedSIS
4. Click on **Save**

Add Learner(s) to an Academic Coach



1. Go to **Curriculum > Academic Coach**
2. Search and click on the academic coach's name
3. Click on **Bulk Assignment**
4. Search for the learner's name
5. Select Learner
6. Click on **Save** to assign Learner

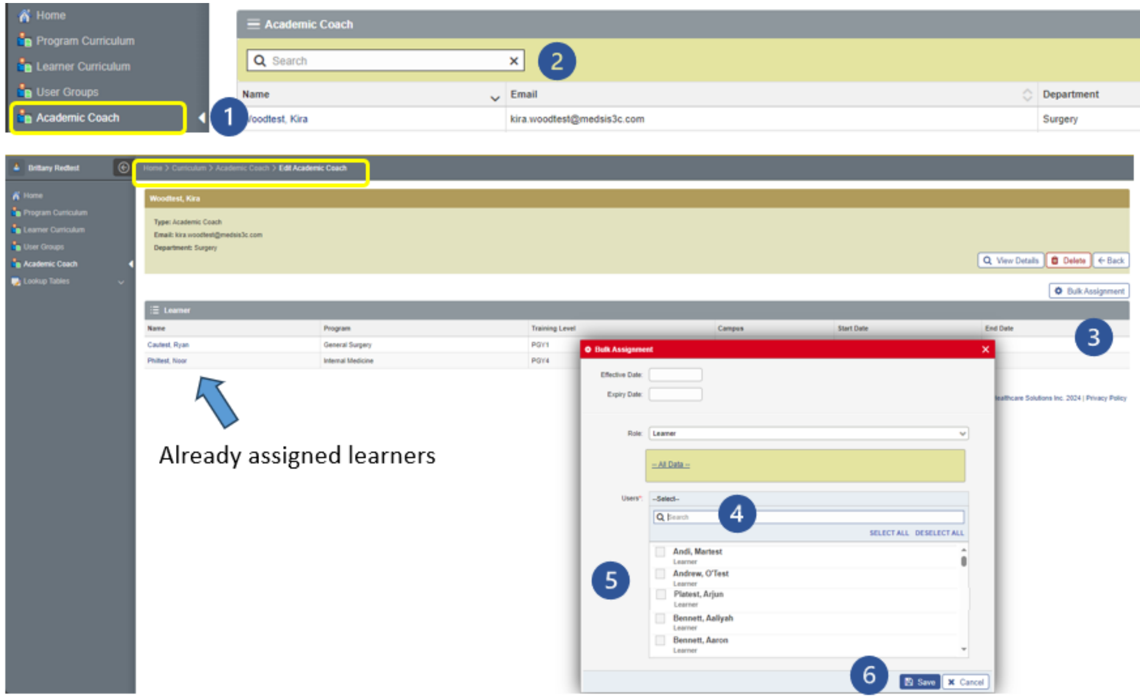
DEMO – managing AAs

- Add a coach
- Add a learner to a coach

2

PRACTICE

a) Add a coach



b) Assign a learner to a coach

1. Go to **Curriculum > Academic Coach**
2. Search and click on the academic coach's name
3. Click on **Bulk Assignment**
4. Search for the learner's name
5. Select Learner
6. Click on **Save** to assign Learner

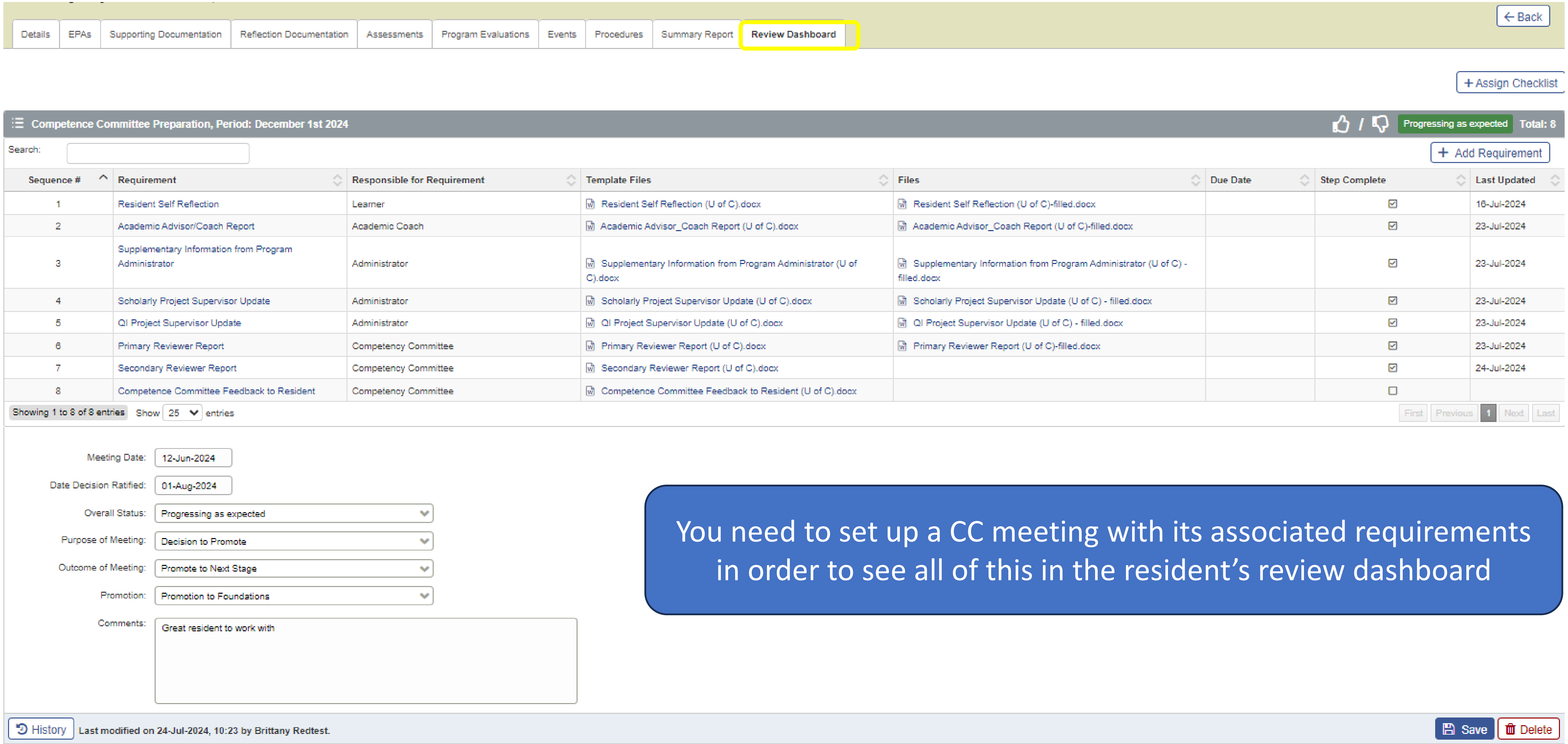
Configuring Competence Committee Meetings

For Awareness Only: Assigning a resident to a CC

- MedSIS supports multiple committees (CC, Remediation sub-committees, RPC etc)
- Each program should have at least one CC in MedSIS (we have set this up for you)
- You have to link each resident to a given committee – it is not automatic (*we have already done this for you for this year – we will teach you how to do this for your new residents in the spring*)

Curriculum

Curriculum > Learner Curriculum > Learner Dashboard Review Dashboard tab



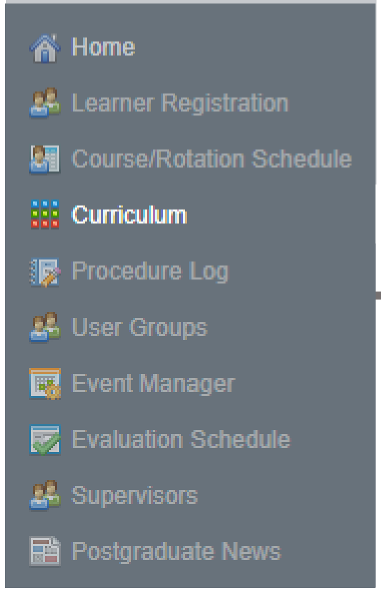
You need to set up a CC meeting with its associated requirements in order to see all of this in the resident's review dashboard

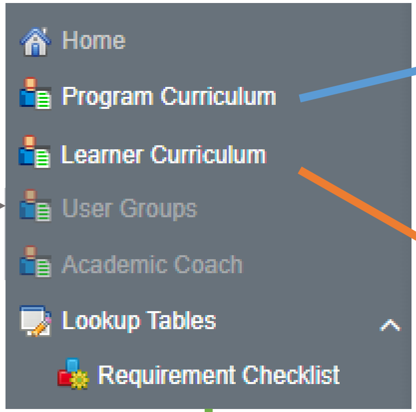
Configuring a Competence Committee Meeting

Summary of Steps (MUST DO IN ORDER):

- **Step 1** – Decide what documents (requirements) you wish to link to your CC meeting and add the *names* of these requirements to the Lookup tables (just need to add these once – can use them for future meetings)
- **Step 2** - Create a Review Period for your CC meeting in your Lookup table
- **Step 3** - Add a Requirements checklist meeting tile to your Requirements tab in Program Curriculum (usually labeled by meeting date)
- **Step 4** - Upload all relevant blank document templates for your requirements, assign who is responsible to complete them and set due dates
- **Step 5** - Select the residents who you wish to review at that meeting

Competence Committee Configuration





2

Path: Program Curriculum > Requirement Checklist
Steps 3 - 5

Create CC Review Checklist tile (This creates the meeting)

- Select the review period
- Add the Requirement templates you want for this meeting
- Select the residents you want to review in the meeting

3

Path: Learner Curriculum > Learning Path > Review Dashboard

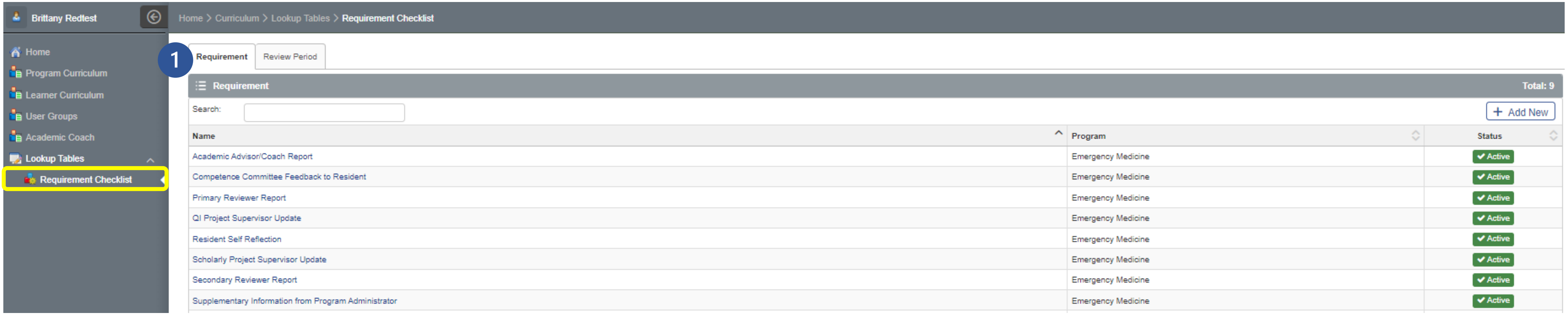
- Download requirement templates and upload completed requirements to individual Resident Dashboards
- Record Meeting Decisions in Resident File

1

Path: Lookup Tables > Requirement Checklist
Steps 1 & 2

- Create name of Requirements (documents) needed for your Competence Committees
- Create a Review period (usually previous meeting date to next meeting date)

Steps 1 & 2 - Curriculum > Lookup tables > Requirement Checklist

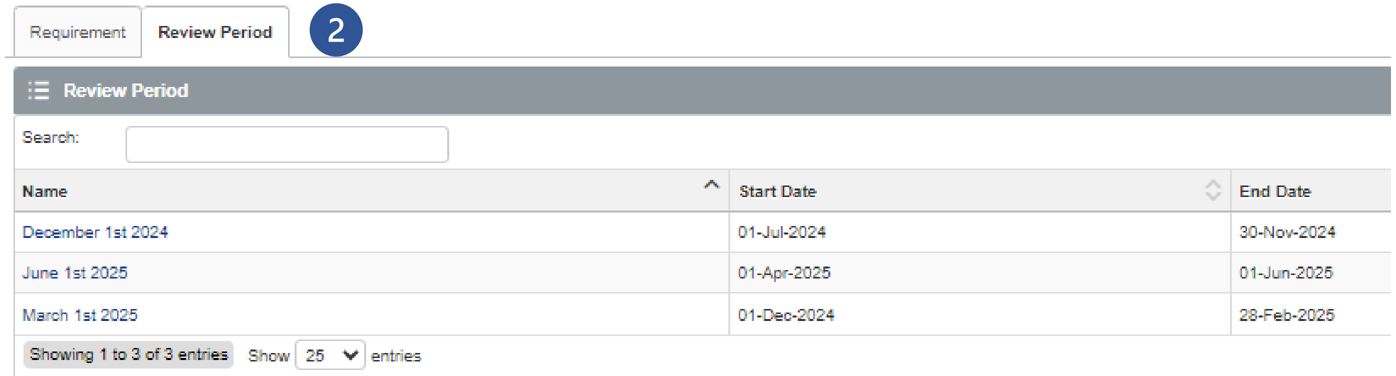


The Requirement Checklist subfolder in Lookup Tables contain 2 tabs:

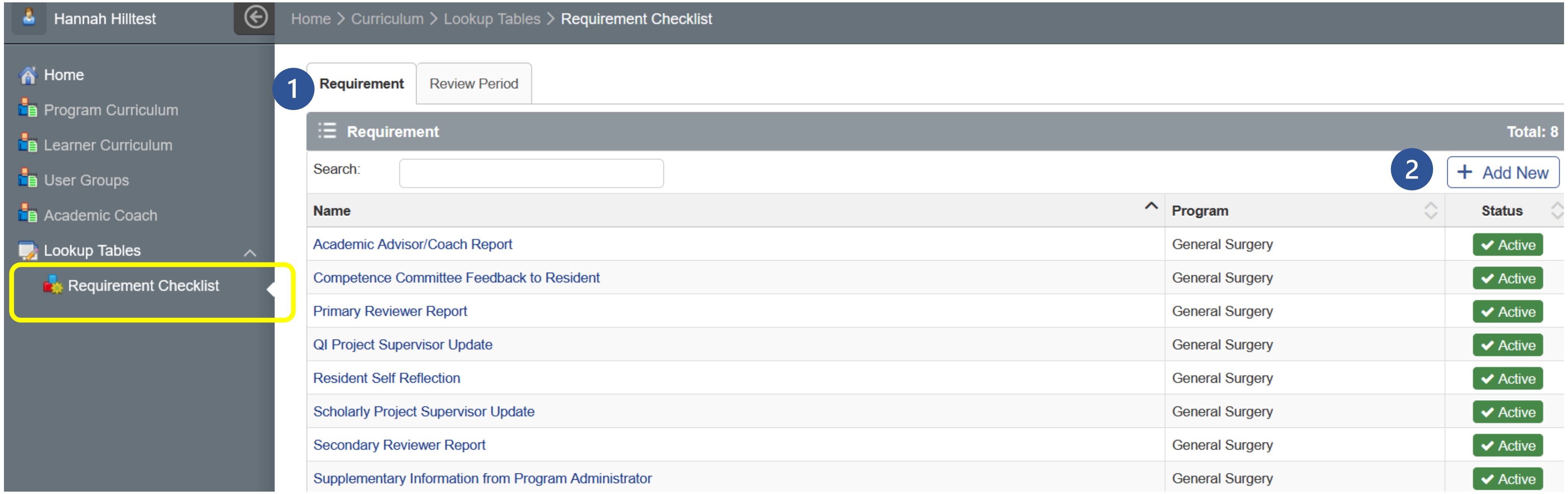
1. **Requirement** – this is a list of document names your program uses to support the workflows of your competence committee (for example: academic advisor report, feedback to resident etc)

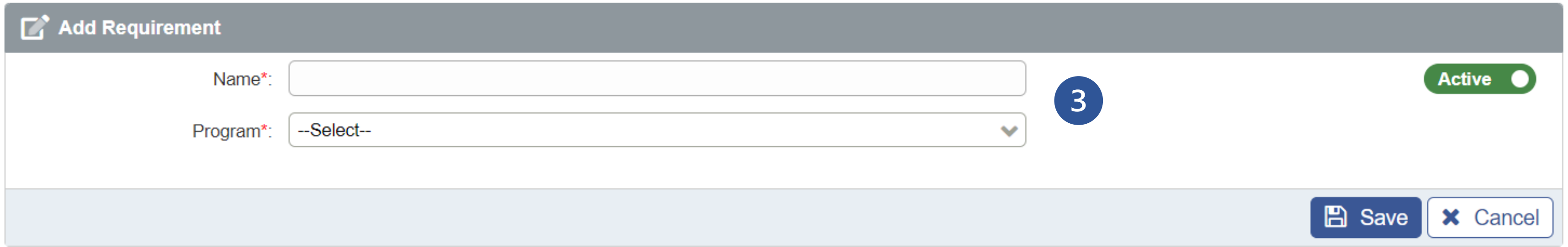
   You will select from these requirements for each CC meeting (review)

2. **Review Period** – this is a list of date ranges linked to each competence committee meeting



STEP 1 - Adding/Deleting CC Requirement Names to your lookup table



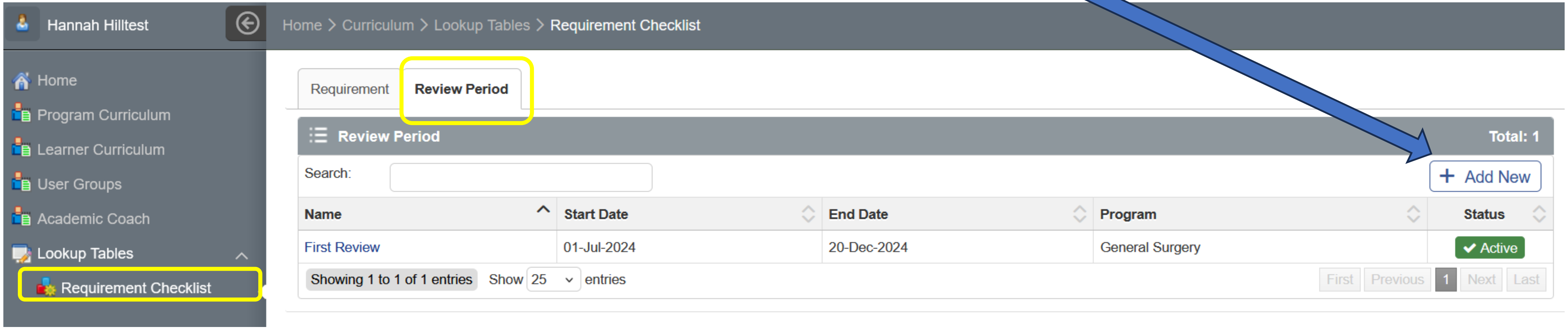


1. Go to the Requirement Tab
2. Click Add New to add a new requirement name (see next slide)
3. Add a name, select program, click Save

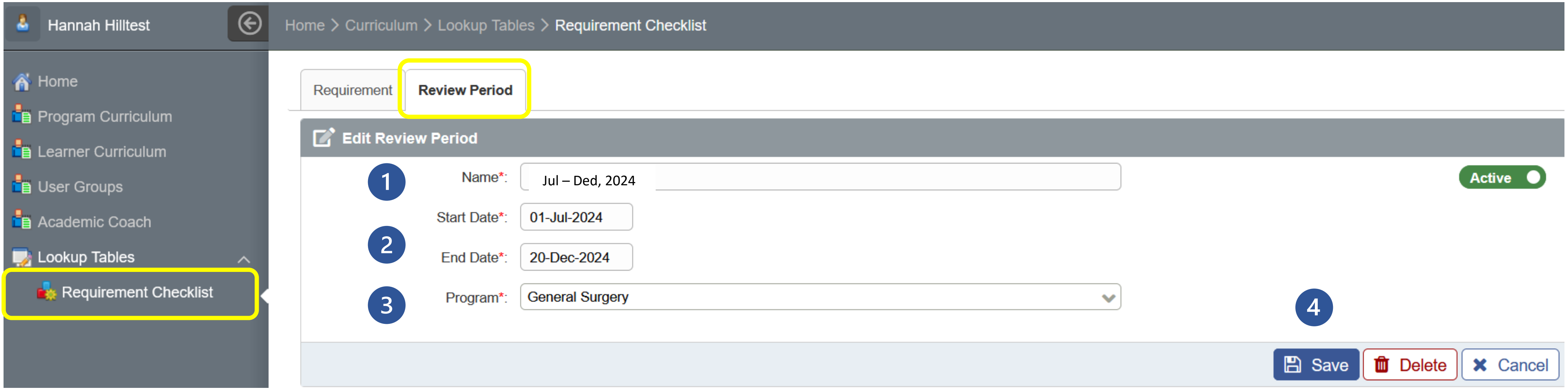
Note: This adds the *name* of your new document to the lookup table (the catalogue of available documents)
Repeat this for each document template that you wish to have available for your CC meetings. Only need to do this once.
To see/modify the *actual document*, you must go to Program Curriculum > Requirement Checklist

Step 2 – Creating a CC Review Period

- Each program must set up a Review Period that will be linked to each CC meeting
- This is usually the date range between that last CC meeting and the next meeting
- Each Review Period has a Name and a Date Range (for the name - likely easiest to just use the date range
- Click + Add New to create a new Review Period

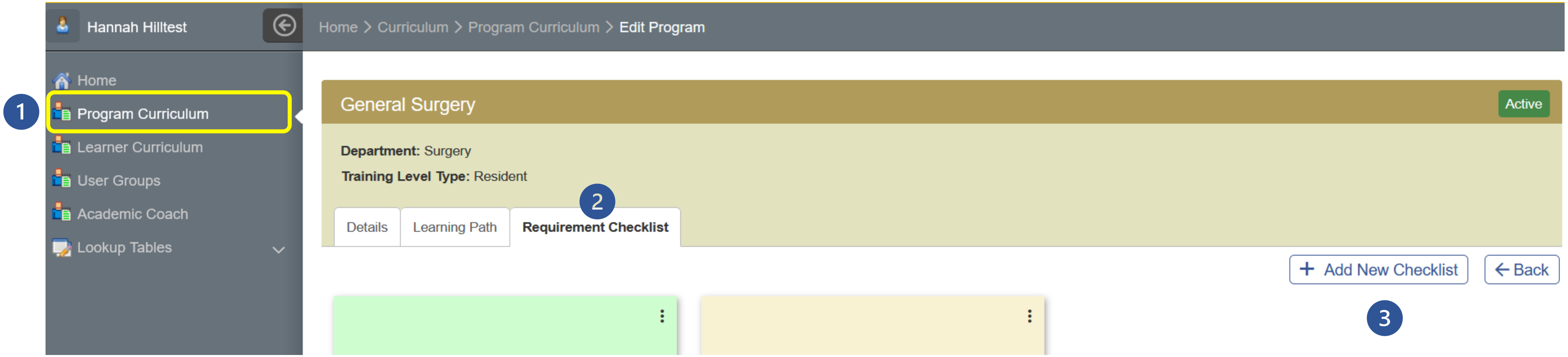


Step 2 - Creating a CC Review Period



1. Enter a "Name" – try to keep a consistent nomenclature – for example:
   - *Jul – Dec, 2024*
2. Adjust the start and end date of the Review Period (we recommend using the date of the most recent CC meeting as the start date and date of the upcoming CC meeting as the end date)
3. Select the name of your program
4. Click Save

Step 3 - Adding a CC Requirement Checklist



1. Go to Program Curriculum

   Select your program

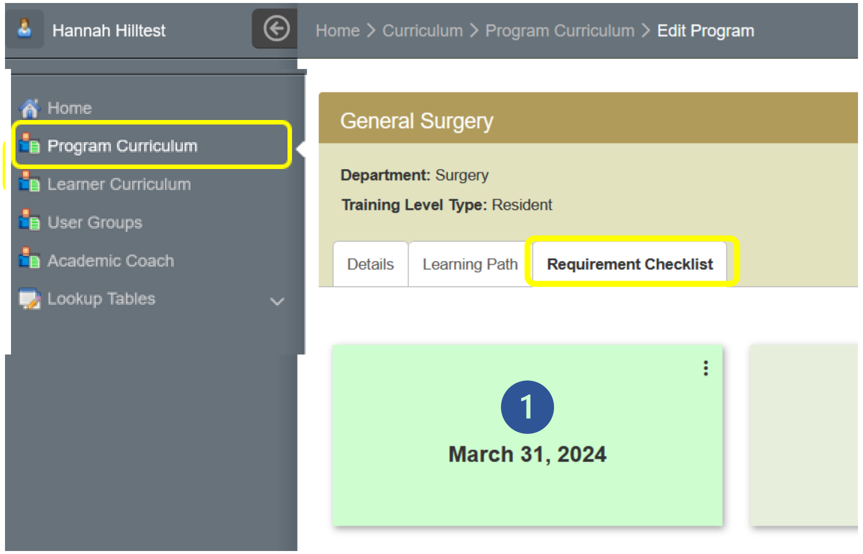
2. Go to Requirement Checklist tab
3. Click +Add New Checklist

You can think of this step as creating the CC meeting

Step 3 - Adding a CC Requirement Checklist

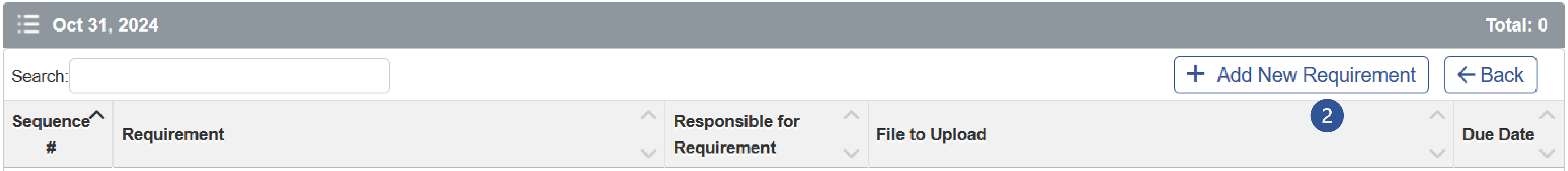
1. We recommend putting the ***date*** of the upcoming CC meeting as the "name", but you can choose other names if preferred
2. The sequence just orders your tiles (you can just put 1 when you start)
3. Select the review period created for this meeting (see previous slides)
4. Click save

Step 4: Adding Competence Committee Requirements to a CC meeting

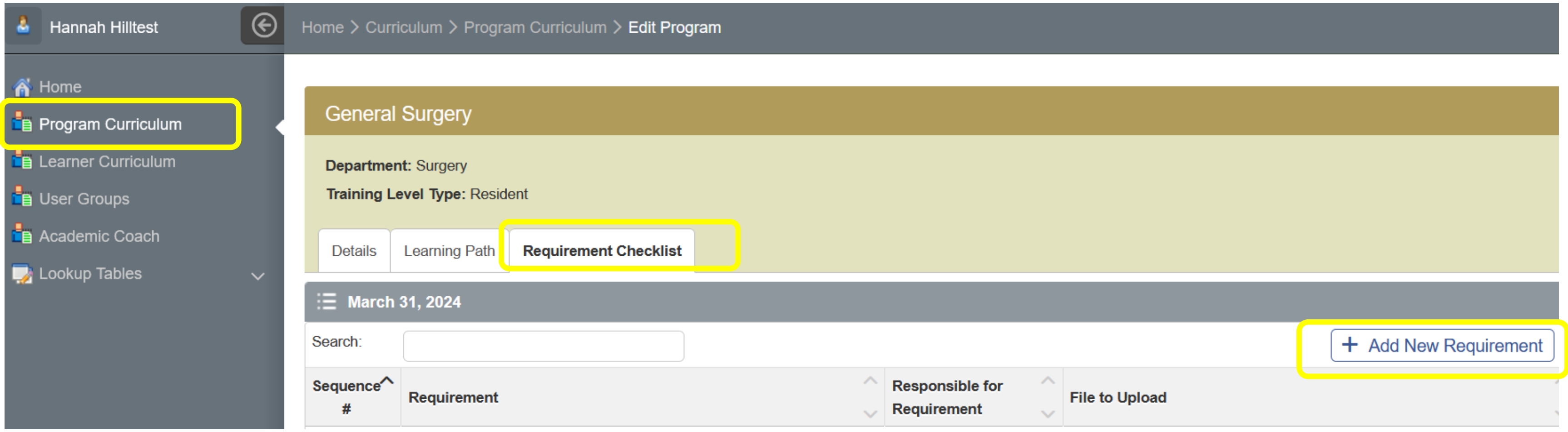


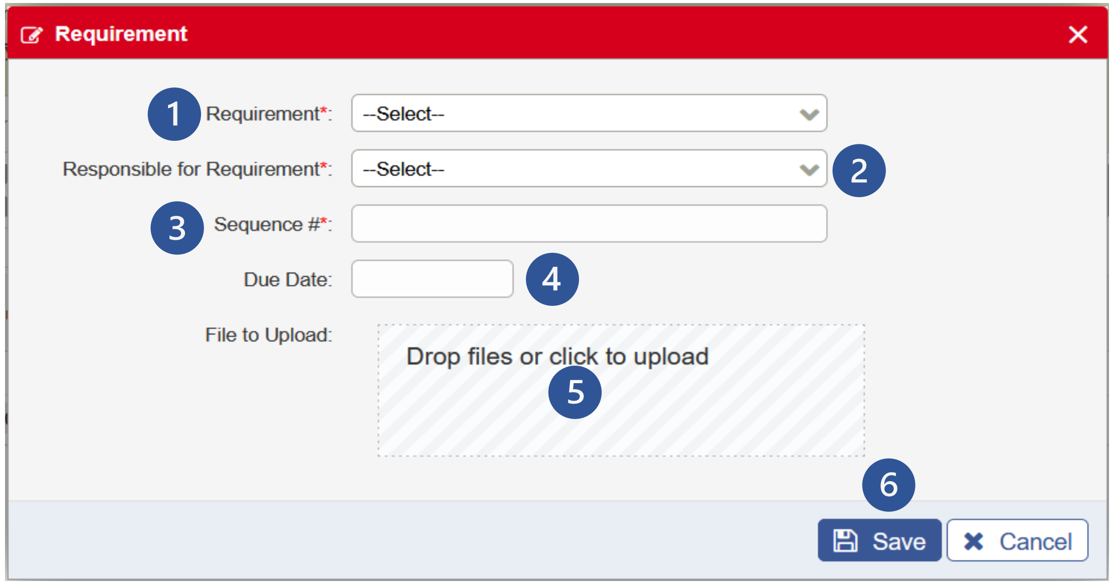
In Curriculum > Program Curriculum > Requirement Checklist

1. Click on the tile for your upcoming meeting date
2. Click Add New Requirement



Step 4 : Adding Competence Committee Requirements to a CC meeting





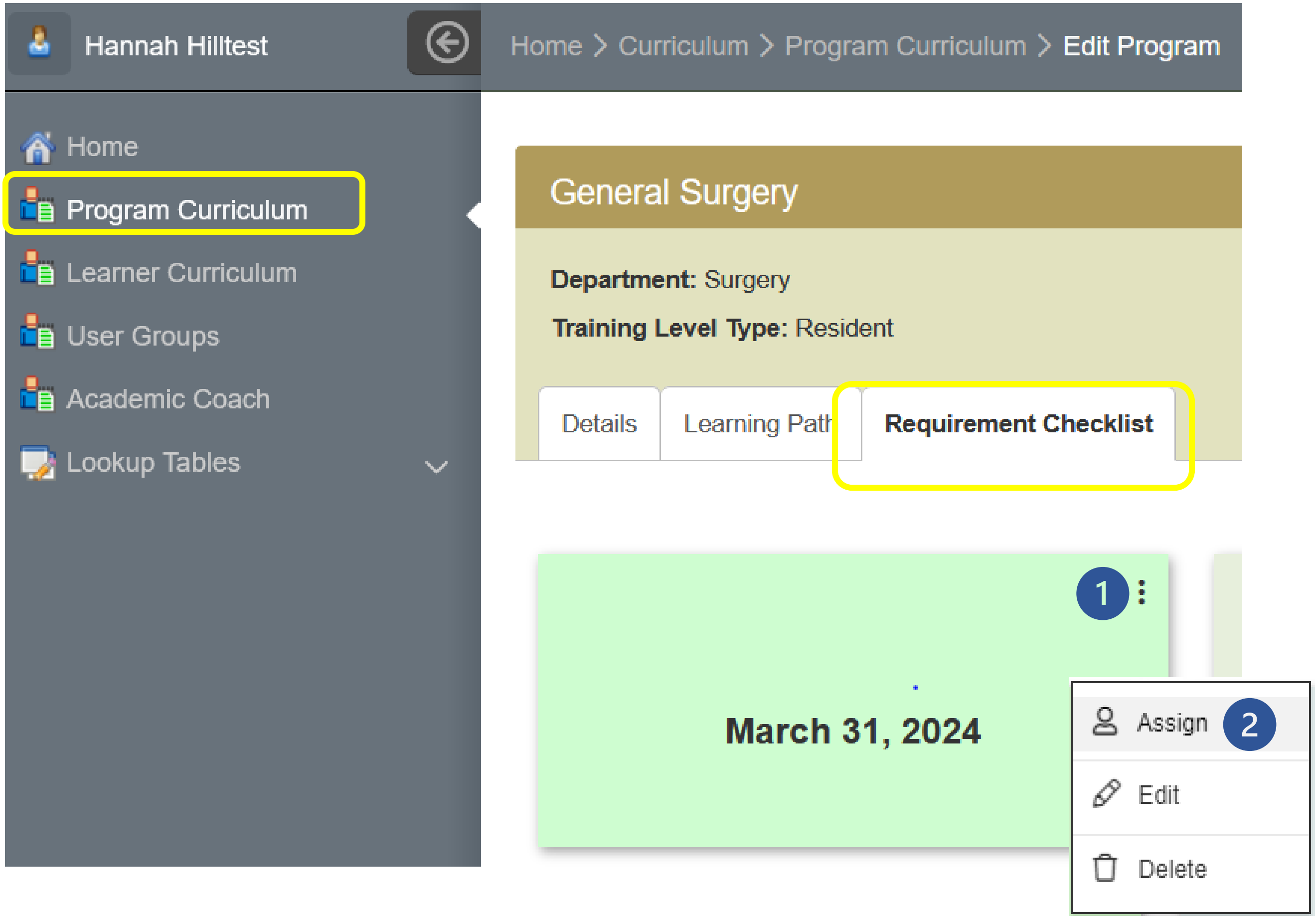
Pop up window:

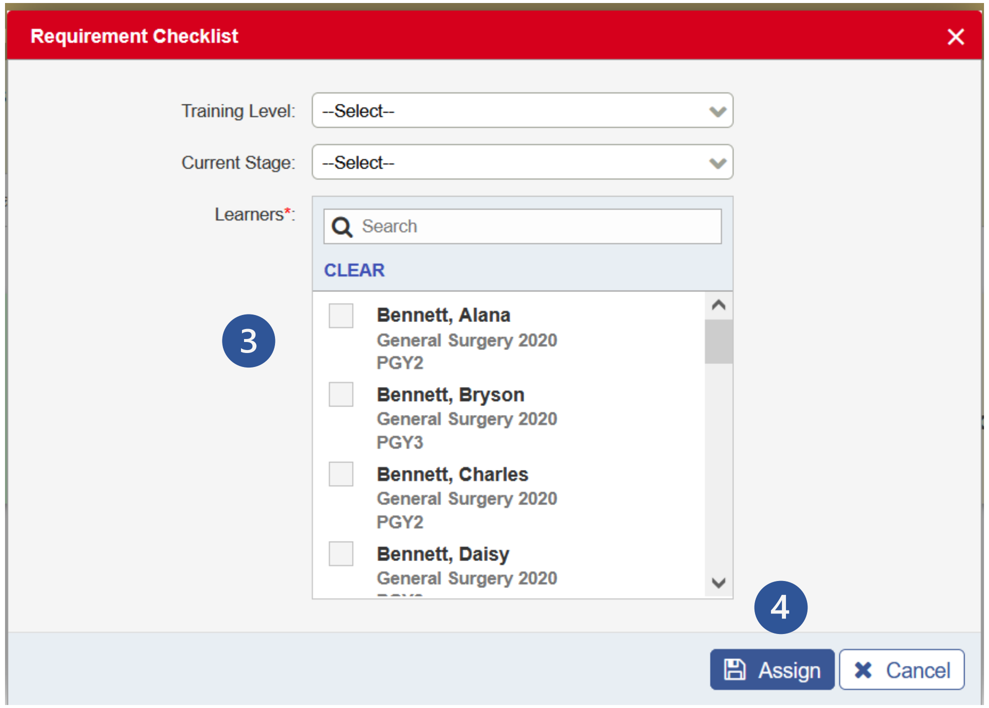
1. Select requirement name (populated from your Requirement Lookup Table)
2. Indicate who is responsible for the requirement
3. Indicate a sequence # for the requirement
4. Select a due date (optional)
5. Click in "Drop files or click to upload" box

   Drag the appropriate blank template into box
6. Click Save

Repeat until all of the blank templates you wish to add to this meeting have been added

Step 5 - Select the Residents for Review



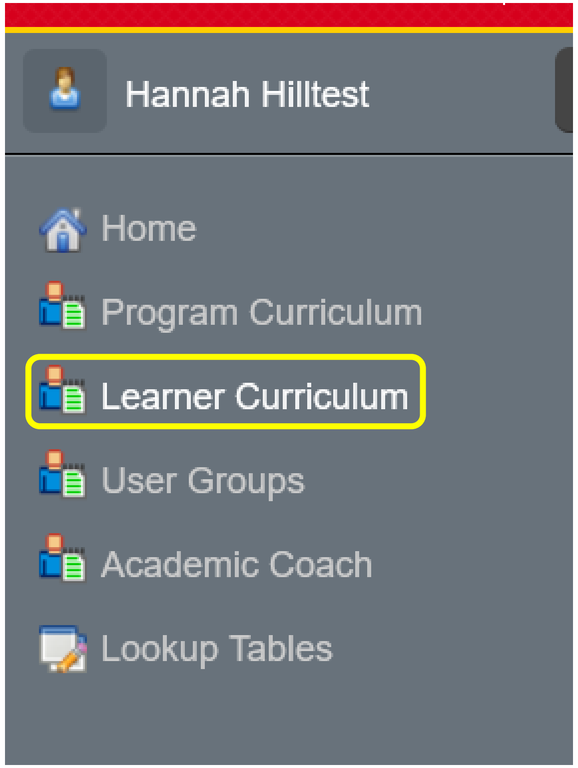


1. Click on the **3 dots** for the CC meeting
2. Click on **Assign**

3. Select the residents who you wish to review at the meeting. Can filter by training levels or stages to make them easier to find.
4. Click on **Assign**

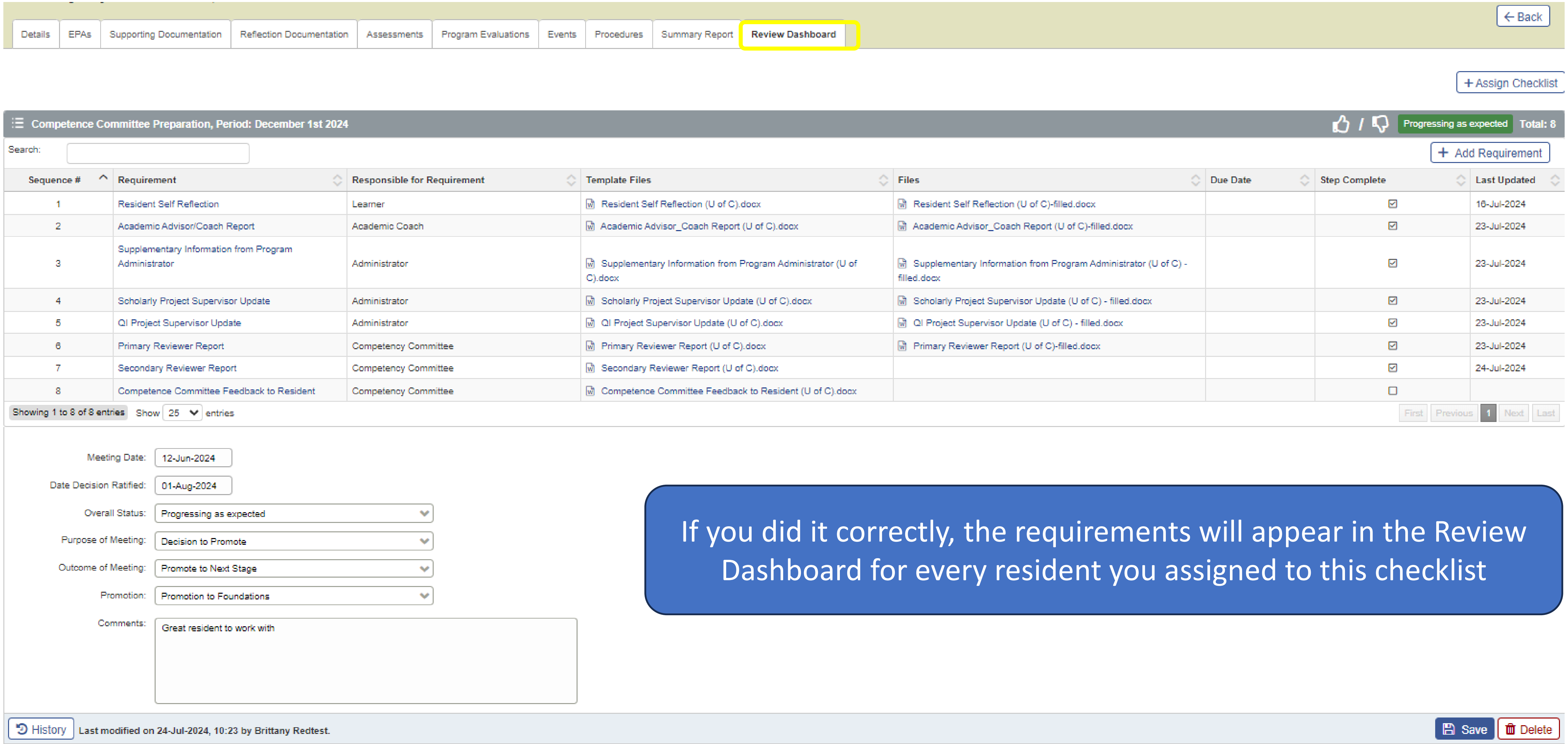
Note: if you don't see a resident on the list, they have already been assigned to this CC meeting

Checking to see if you did it correctly



- All templates attached to your meeting will appear in the **Review Dashboard** tab for each resident assigned for review at that meeting
- You must enter a resident's file to download requirement templates, upload completed requirements, and view their completed requirements
- Reminder: Find your residents in Curriculum > **Learner Curriculum**

Curriculum > Learner Curriculum > Learner Dashboard Review Dashboard tab

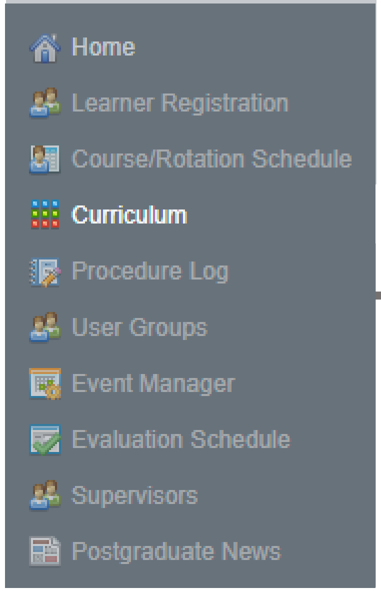


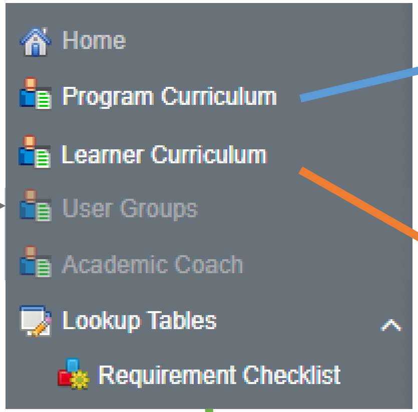
If you did it correctly, the requirements will appear in the Review Dashboard for every resident you assigned to this checklist

WARNING!!!!!

- The files that are uploaded into the review dashboard are visible to anyone who has access to the resident's file
  - The resident
  - PD/PA
  - CC members
  - AA

Competence Committee Configuration





2

Path: Program Curriculum > Requirement Checklist
Steps 3 - 5

Create CC Review Checklist tile (This creates the meeting)

- Select the review period
- Add the Requirement templates you want for this meeting
- Select the residents you want to review in the meeting

3

Path: Learner Curriculum > Learning Path > Review Dashboard

- Download requirement templates and upload completed requirements to individual Resident Dashboards
- Record Meeting Decisions in Resident File

1

Path: Lookup Tables > Requirement Checklist
Steps 1 & 2

- Create name of Requirements (documents) needed for your Competence Committees
- Create a Review period (usually previous meeting date to next meeting date)

3

PRACTICE – set a CC meeting up from scratch

- You have an upcoming meeting on December 20, 2024
- Your last meeting was September 10, 2024
- You want to include a new document *the resident is responsible for*

We need a sample document in order to do this exercise.
Go to: Curriculum > Learner Curriculum > Review Dashboard: click on template file “Comp Com Feedback…” to download to the Downloads file on your training computer – it will be read only on your training computer - we will use this file to demo upload functions

2025 January Review, Period: 2025 Jan Review Total: 2

Search: + Add Requirement

Sequence #	Requirement	Responsible for Requirement	Template Files	Files	Due Date	Step Complete	Last Updated
1	Competence Committee Summary	Competency Committee	Competence Committee Feedback to Resident (U of C) (1).docx			☐	

4 PRACTICE - Set your meeting up from scratch

Summary of Steps (**MUST DO IN ORDER**):

Steps 1 & 2 | Home > Curriculum > Lookup Tables > Requirement Checklist

- **Step 1** – Decide what documents (requirements) you wish to link to your CC meeting and add the *names* of these requirements to the Lookup tables (just need to add these once – can use them for future meetings)

- **Step 2** - Create a Review Period for your CC meeting in your Lookup table

Steps 3 - 5 | Home > Curriculum > Program Curriculum > Edit Program | > Requirement Checklist tab

- **Step 3** - Add a Requirements checklist meeting tile to your Requirements tab in Program Curriculum (usually labeled by meeting date)

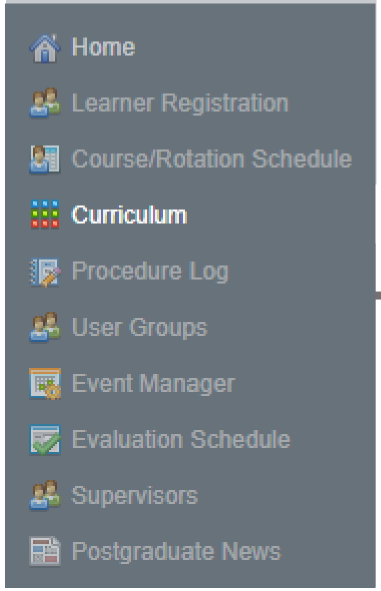
- **Step 4** - Upload all relevant blank document templates for your requirements, assign who is responsible to complete them and set due dates

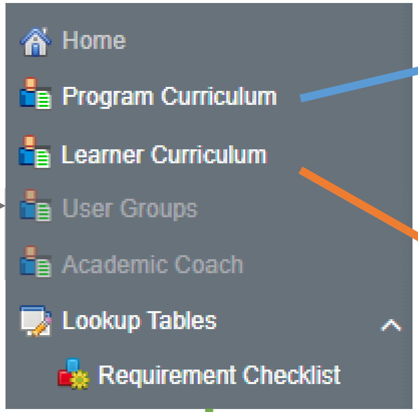
- **Step 5** - Select the residents who you wish to review at that meeting

5

Competence Committee Configuration

PRACTICE





2

Path: Program Curriculum > Requirement Checklist
Steps 3 - 5

Create CC Review Checklist tile (This creates the meeting)

- Select the review period
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- Select the residents you want to review in the meeting

3

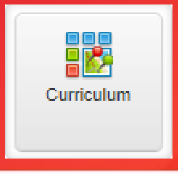
Path: Learner Curriculum > Learning Path > Review Dashboard

- Download requirement templates and upload completed requirements to individual Resident Dashboards
- Record Meeting Decisions in Resident File

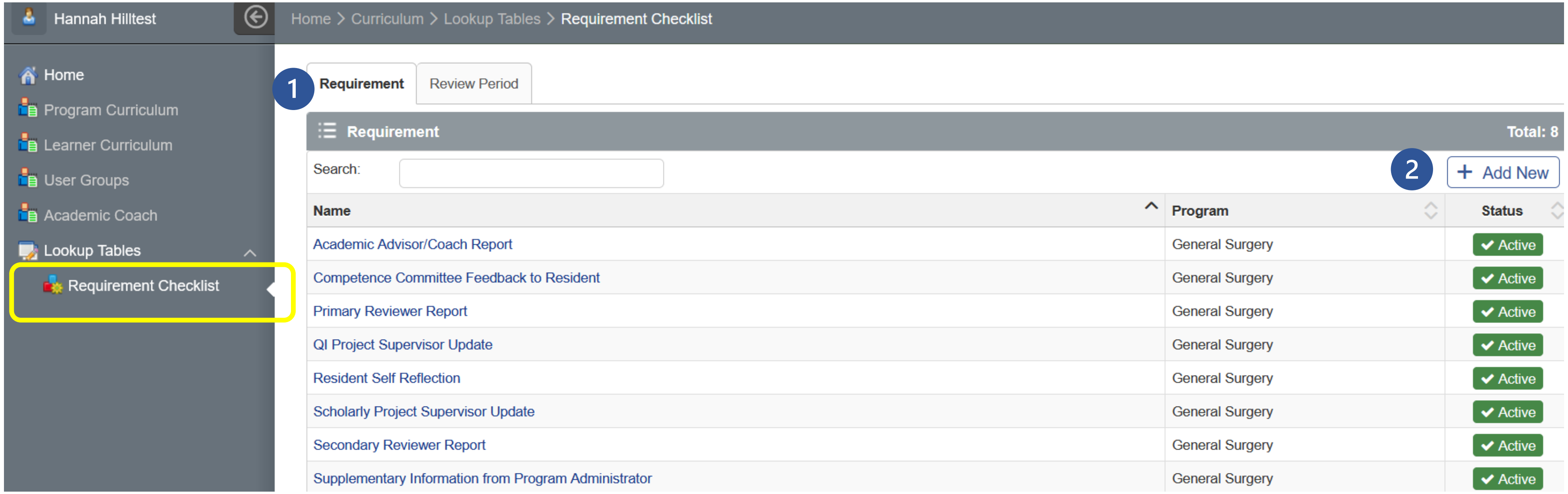
1

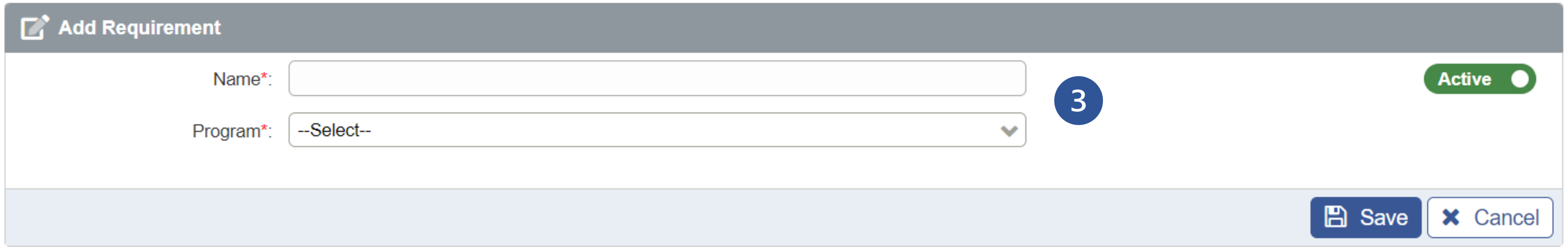
Path: Lookup Tables > Requirement Checklist
Steps 1 & 2

- Create name of Requirements (documents) needed for your Competence Committees
- Create a Review period (usually previous meeting date to next meeting date)



DEMO: STEP 1 - Adding a new CC Requirement to your lookup table



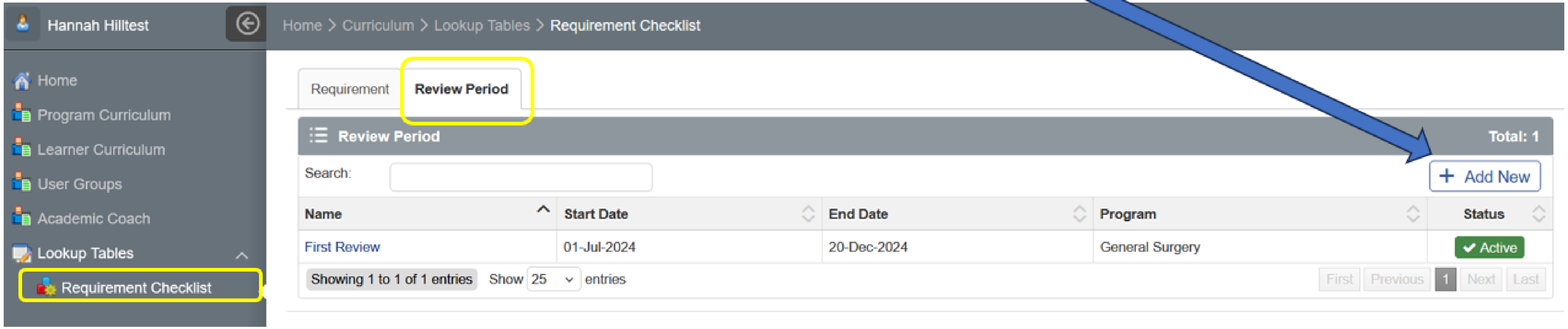


1. Go to the Requirement Tab
2. Click Add New to add a new requirement name (see next slide)
3. Add a name, select program, click Save

Curriculum

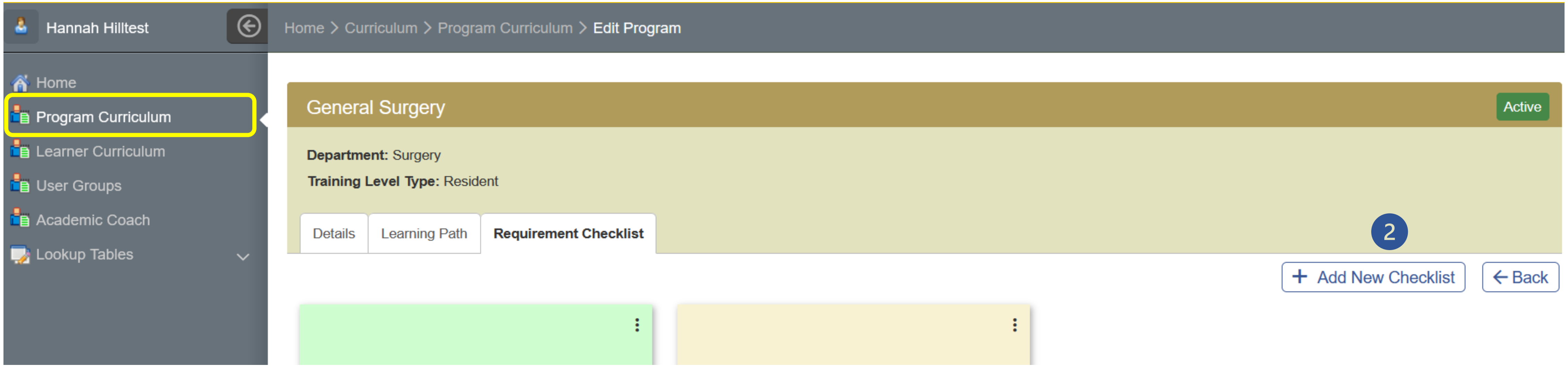
DEMO: Step 2 – Creating a CC Review Period

- Click + Add New to create a new Review Period

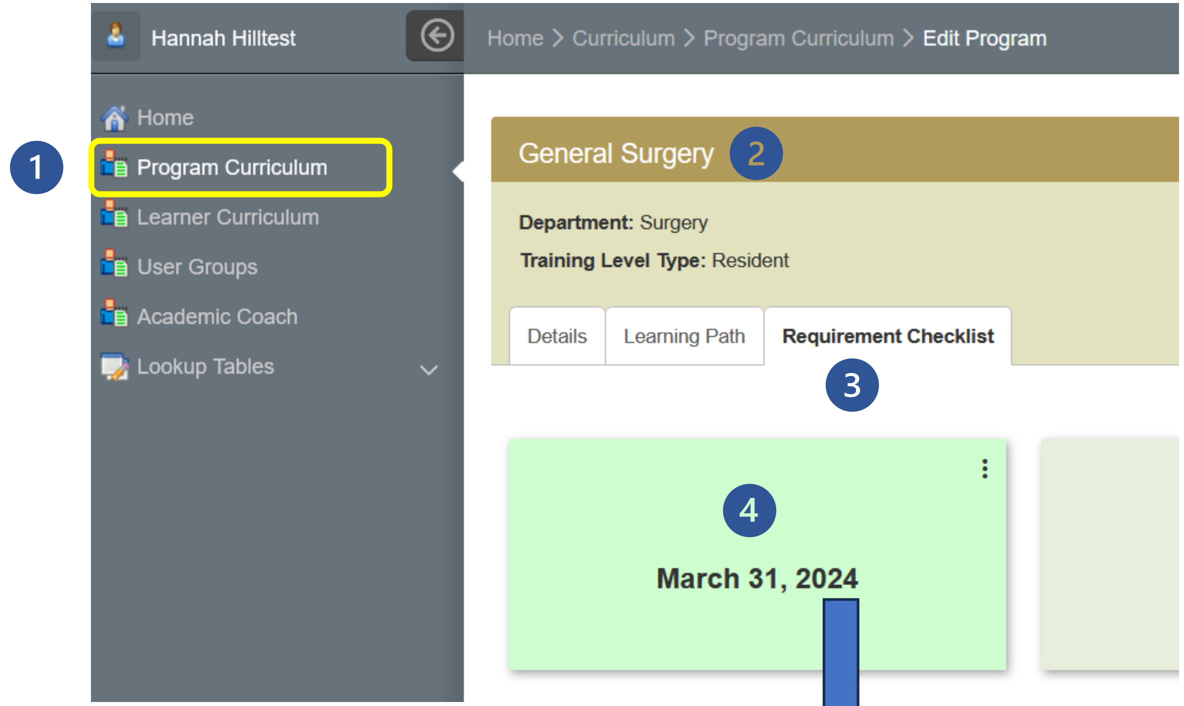


Curriculum

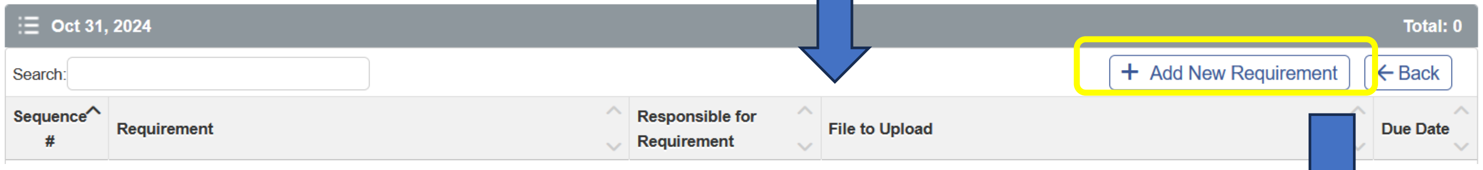
DEMO: Step 3 - Adding a CC Requirement Checklist

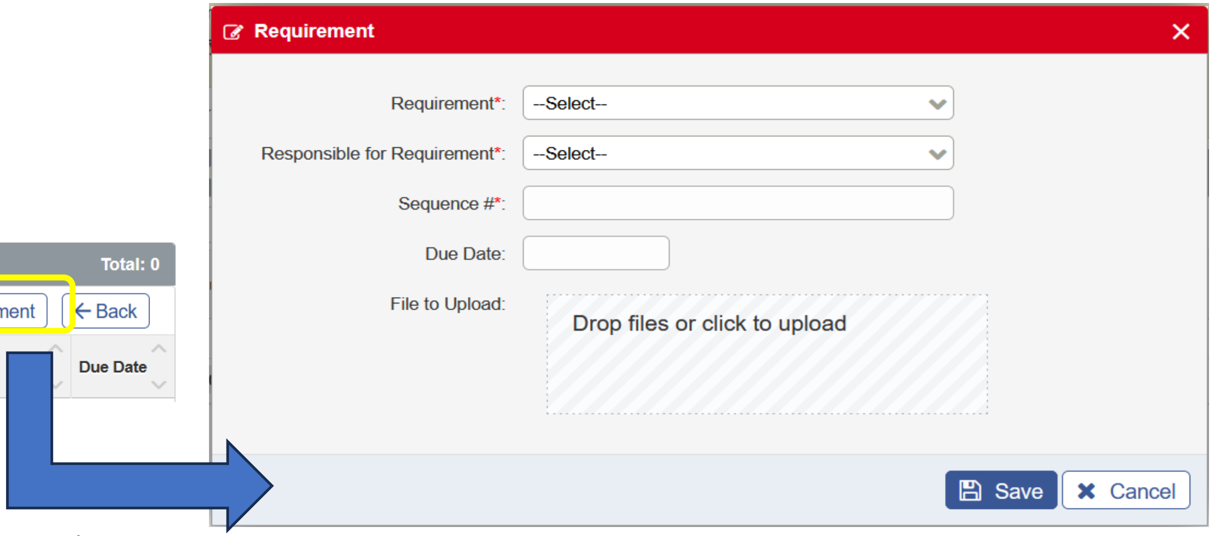


DEMO: Step 4: Adding Competence Committee Requirements to a CC meeting

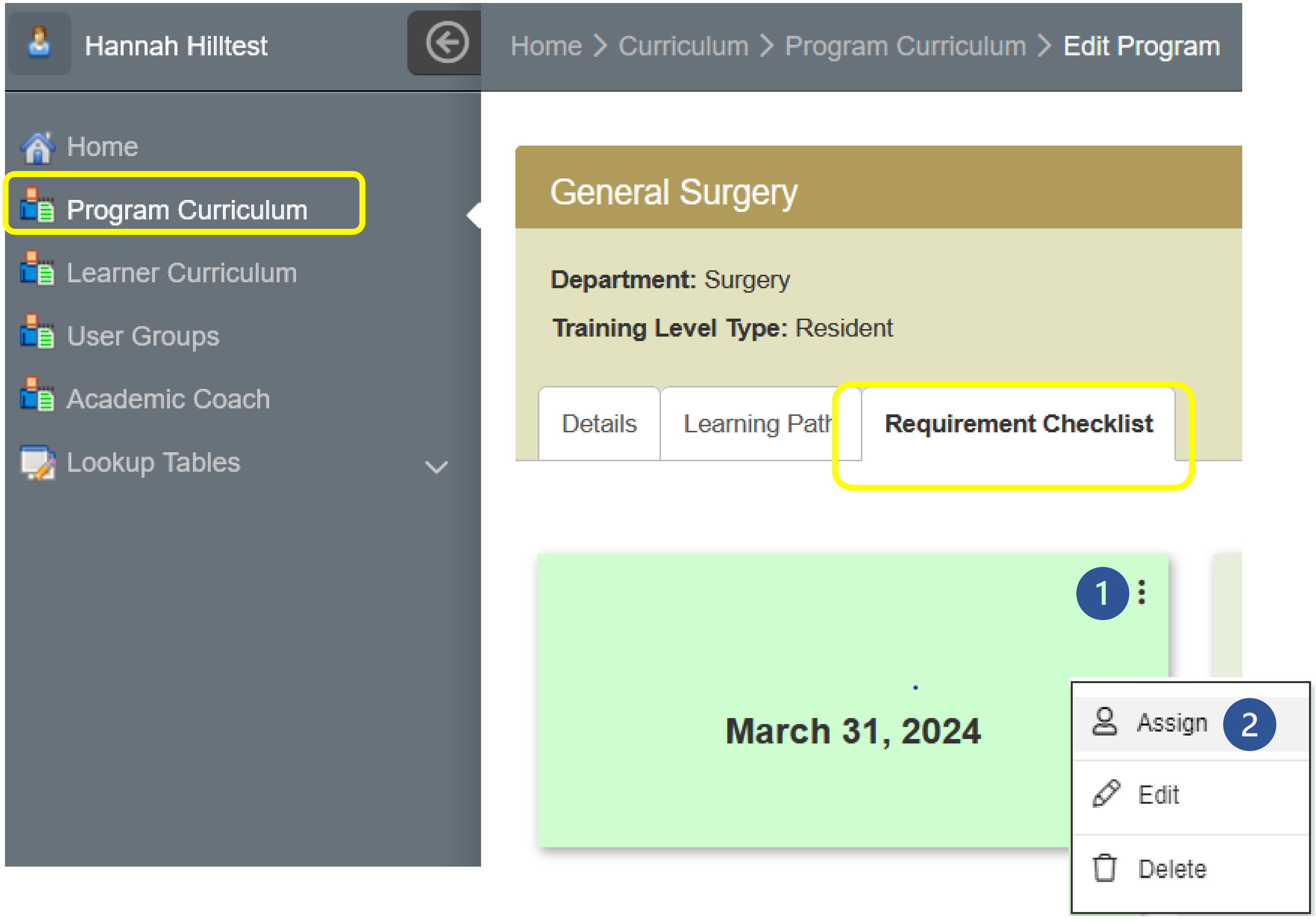


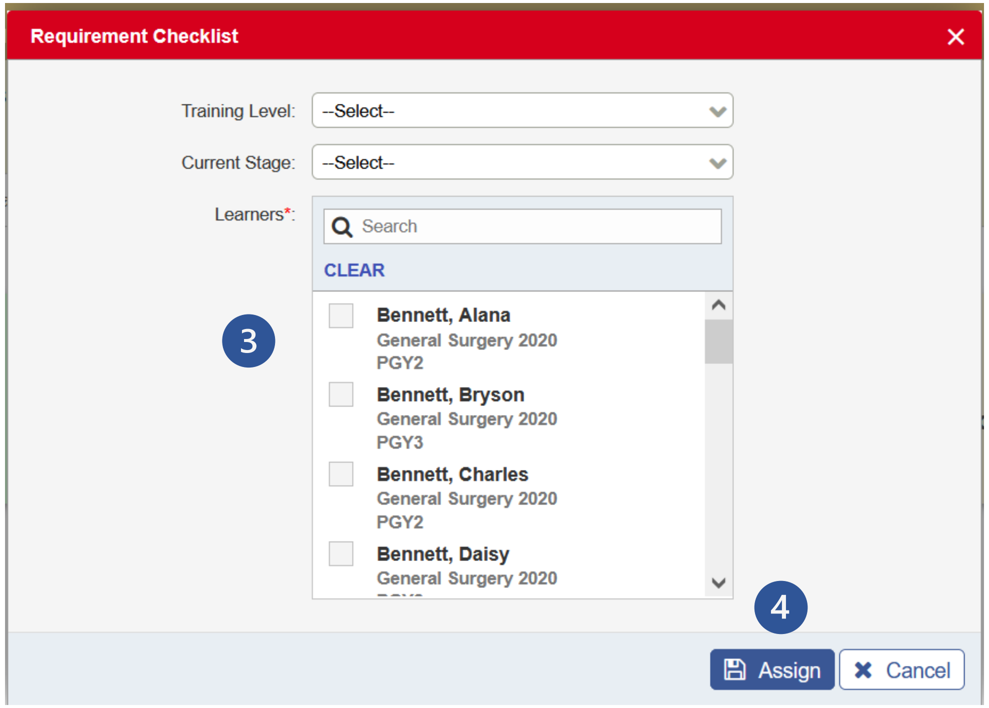
1. In Program Curriculum
2. Select your program name
3. Go to Requirement Checklist tab
4. Click on the tile for your upcoming meeting date





DEMO: Step 5 - Select the Residents for Review





1 Click on the **3 dots** for the CC meeting

2 Click on **Assign**

3 Select the residents who you wish to review at the meeting. Can filter by training levels or stages to make them easier to find.

4 Click on **Assign**.

Curriculum

DEMO: Check if done correctly
Curriculum > Learner Curriculum > Learner Dashboard

Details | EPAs | Supporting Documentation | Reflection Documentation | Assessments | Program Evaluations | Events | Procedures | Summary Report | **Review Dashboard**

← Back

+ Assign Checklist

Competence Committee Preparation, Period: December 1st 2024 / Progressing as expected Total: 8

Search:

+ Add Requirement

Sequence #	Requirement	Responsible for Requirement	Template Files	Files	Due Date	Step Complete	Last Updated
1	Resident Self Reflection	Learner	Resident Self Reflection (U of C).docx	Resident Self Reflection (U of C)-filled.docx		☑	16-Jul-2024
2	Academic Advisor/Coach Report	Academic Coach	Academic Advisor_Coach Report (U of C).docx	Academic Advisor_Coach Report (U of C)-filled.docx		☑	23-Jul-2024
3	Supplementary Information from Program Administrator	Administrator	Supplementary Information from Program Administrator (U of C).docx	Supplementary Information from Program Administrator (U of C) - filled.docx		☑	23-Jul-2024
4	Scholarly Project Supervisor Update	Administrator	Scholarly Project Supervisor Update (U of C).docx	Scholarly Project Supervisor Update (U of C) - filled.docx		☑	23-Jul-2024
5	QI Project Supervisor Update	Administrator	QI Project Supervisor Update (U of C).docx	QI Project Supervisor Update (U of C) - filled.docx		☑	23-Jul-2024
6	Primary Reviewer Report	Competency Committee	Primary Reviewer Report (U of C).docx	Primary Reviewer Report (U of C)-filled.docx		☑	23-Jul-2024
7	Secondary Reviewer Report	Competency Committee	Secondary Reviewer Report (U of C).docx			☑	24-Jul-2024
8	Competence Committee Feedback to Resident	Competency Committee	Competence Committee Feedback to Resident (U of C).docx			☐	

Showing 1 to 8 of 8 entries Show 25 entries

First Previous 1 Next Last

Meeting Date: 12-Jun-2024

Date Decision Ratified: 01-Aug-2024

Overall Status: Progressing as expected

Purpose of Meeting: Decision to Promote

Outcome of Meeting: Promote to Next Stage

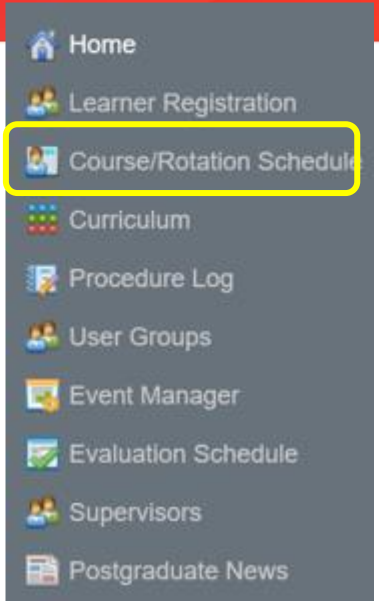
Promotion: Promotion to Foundations

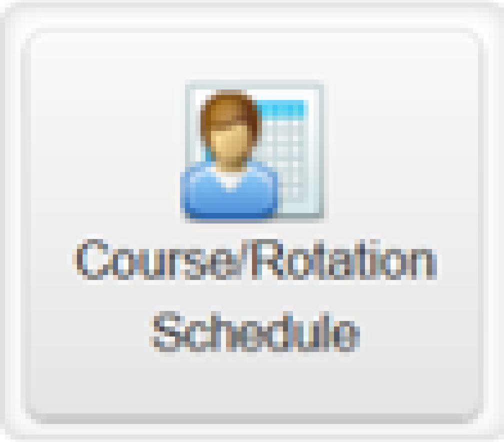
Comments: Great resident to work with

History Last modified on 24-Jul-2024, 10:23 by Brittany Redtest.

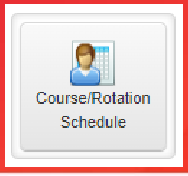
Save Delete

If you did it correctly, the requirements will appear in the Review Dashboard for every resident you assigned to this checklist

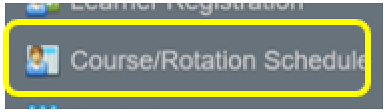


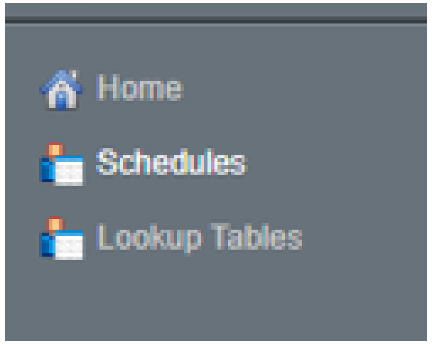


Course/Rotation Schedule



Course/Rotation Schedule Module: key functions





Schedules

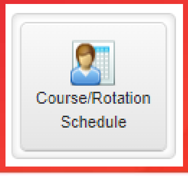
- View/edit my resident schedules
- Update rotation details
- Publish rotations
- Filter on-service and off-service residents

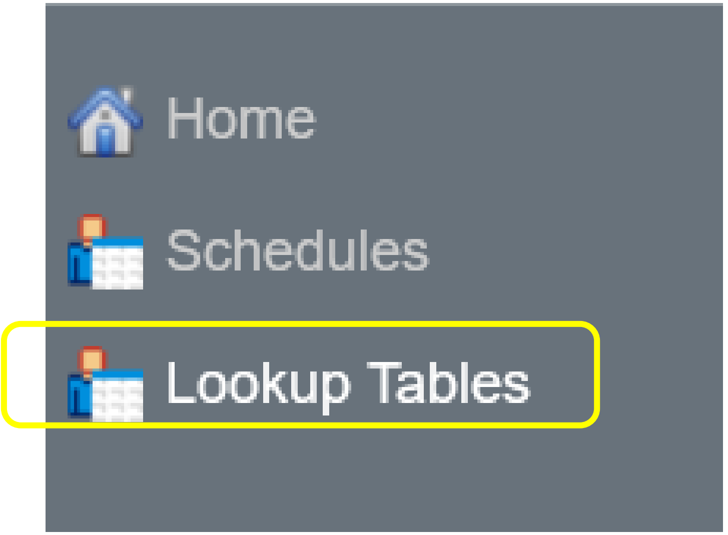
Slide x

Lookup Tables

- Review the rotation catalogue

Slide x

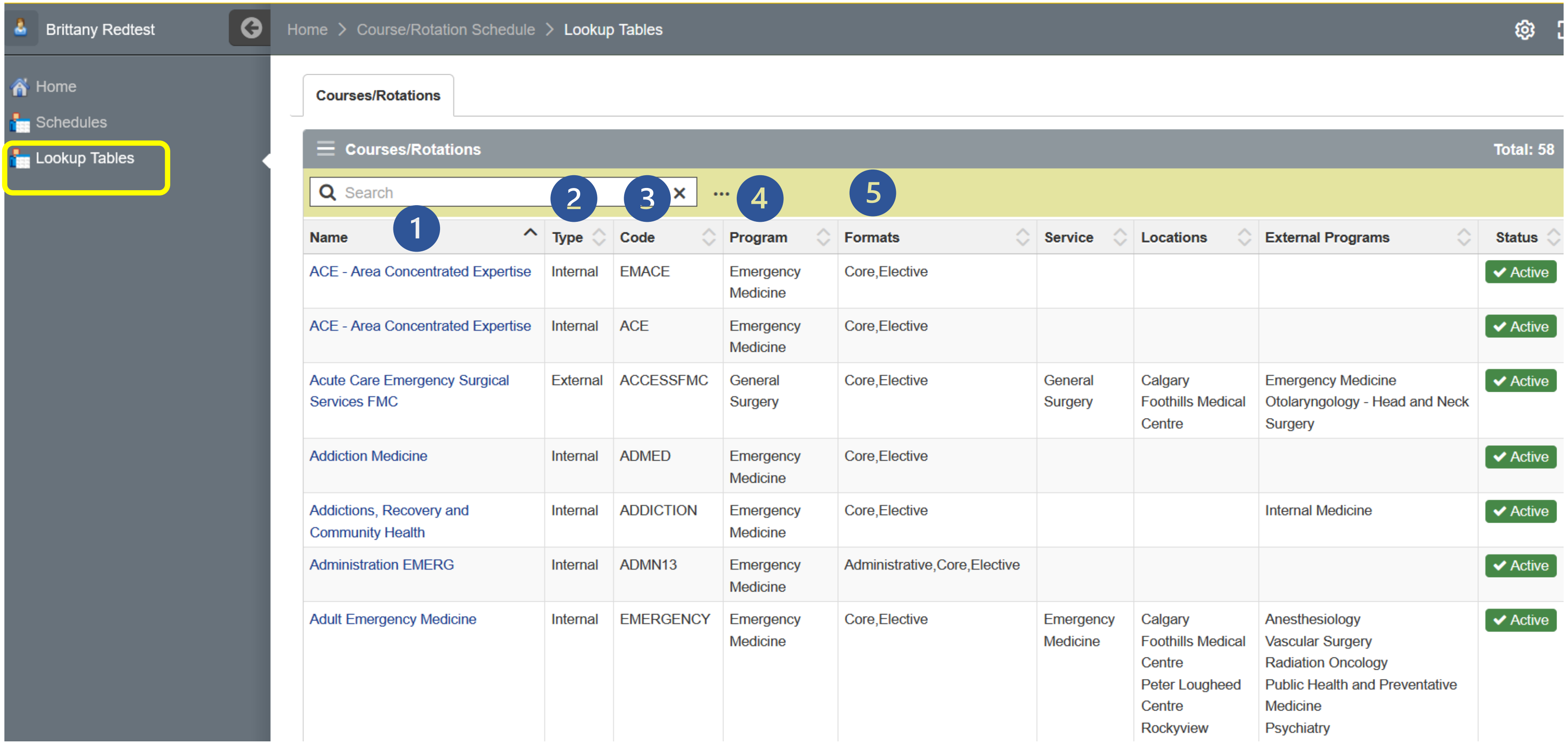




Lookup Tables

Course/Rotation Schedule > Lookup Tables

- View the rotations that have been linked to your program



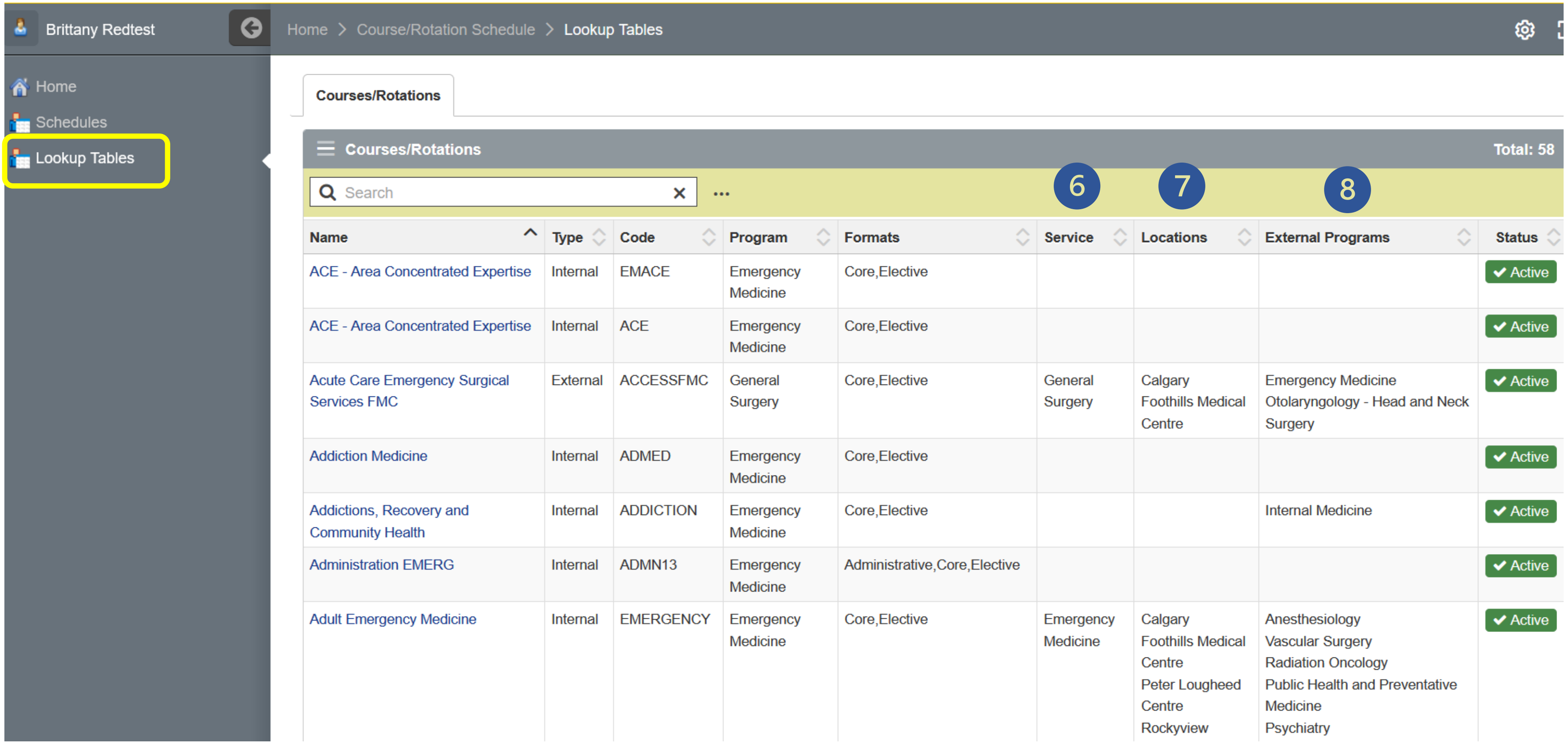
Name	Type	Code	Program	Formats	Service	Locations	External Programs	Status
ACE - Area Concentrated Expertise	Internal	EMACE	Emergency Medicine	Core,Elective				Active
ACE - Area Concentrated Expertise	Internal	ACE	Emergency Medicine	Core,Elective				Active
Acute Care Emergency Surgical Services FMC	External	ACCESSFMC	General Surgery	Core,Elective	General Surgery	Calgary Foothills Medical Centre	Emergency Medicine Otolaryngology - Head and Neck Surgery	Active
Addiction Medicine	Internal	ADMED	Emergency Medicine	Core,Elective				Active
Addictions, Recovery and Community Health	Internal	ADDICTION	Emergency Medicine	Core,Elective			Internal Medicine	Active
Administration EMERG	Internal	ADMN13	Emergency Medicine	Administrative,Core,Elective				Active
Adult Emergency Medicine	Internal	EMERGENCY	Emergency Medicine	Core,Elective	Emergency Medicine	Calgary Foothills Medical Centre Peter Lougheed Centre Rockyview	Anesthesiology Vascular Surgery Radiation Oncology Public Health and Preventative Medicine Psychiatry	Active

1. Name of Rotation
2. Type: Internal = owned by this program; External = owned by another program
3. Code = short name
4. Program = owner of rotation
5. Format = rotation format (e.g. core, elective, selective, research, admin)

Course/Rotation Schedule

Course/Rotation Schedule > Lookup Tables

- View the rotations that have been linked to your program

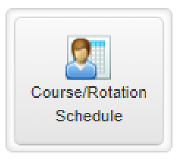


Name	Type	Code	Program	Formats	Service	Locations	External Programs	Status
ACE - Area Concentrated Expertise	Internal	EMACE	Emergency Medicine	Core,Elective				Active
ACE - Area Concentrated Expertise	Internal	ACE	Emergency Medicine	Core,Elective				Active
Acute Care Emergency Surgical Services FMC	External	ACCESSFMC	General Surgery	Core,Elective	General Surgery	Calgary Foothills Medical Centre	Emergency Medicine Otolaryngology - Head and Neck Surgery	Active
Addiction Medicine	Internal	ADMED	Emergency Medicine	Core,Elective				Active
Addictions, Recovery and Community Health	Internal	ADDICTION	Emergency Medicine	Core,Elective			Internal Medicine	Active
Administration EMERG	Internal	ADMN13	Emergency Medicine	Administrative,Core,Elective				Active
Adult Emergency Medicine	Internal	EMERGENCY	Emergency Medicine	Core,Elective	Emergency Medicine	Calgary Foothills Medical Centre Peter Lougheed Centre Rockyview	Anesthesiology Vascular Surgery Radiation Oncology Public Health and Preventative Medicine Psychiatry	Active

6 Clinical service linked to rotation (if relevant)

7 Locations available for this rotation (if blank, can choose anywhere)

8 External Programs: These are the off-service programs who can access the rotation



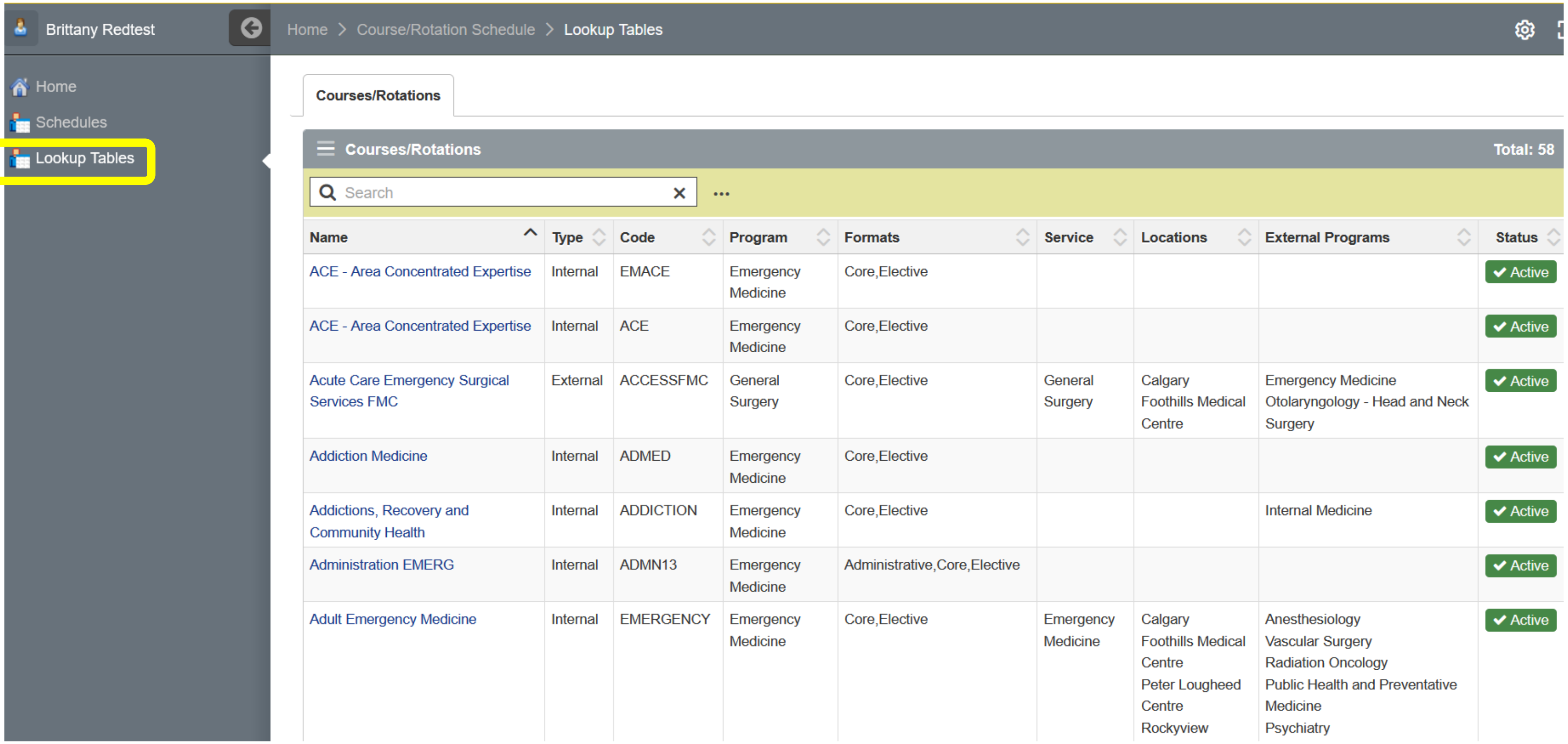
Course/Rotation Schedule > Lookup Tables

Important

- The available rotations in the Lookup Table were generated from the information provided by programs and a review of past rotation schedules in one45
- Some rotations did not have a natural program “owner” so you may see a rotation that seems unusual for you to “own” – let PGME know if it would be better situated with another U of C Residency Program
- If a location is blank, then it can be completed anywhere, if a list of locations is provided, then it can only be done at one of the listed locations. If you see errors in the location options for a rotation, please notify PGME
- If you do not have access to all of the rotations that you need, contact PGME and we can add you to rotations as needed

EXPLORE

- Take a few minutes to look through the rotations that you OWN internal) and those that you have access to (external)



Name	Type	Code	Program	Formats	Service	Locations	External Programs	Status
ACE - Area Concentrated Expertise	Internal	EMACE	Emergency Medicine	Core,Elective				✔ Active
ACE - Area Concentrated Expertise	Internal	ACE	Emergency Medicine	Core,Elective				✔ Active
Acute Care Emergency Surgical Services FMC	External	ACCESSFMC	General Surgery	Core,Elective	General Surgery	Calgary Foothills Medical Centre	Emergency Medicine Otolaryngology - Head and Neck Surgery	✔ Active
Addiction Medicine	Internal	ADMED	Emergency Medicine	Core,Elective				✔ Active
Addictions, Recovery and Community Health	Internal	ADDICTION	Emergency Medicine	Core,Elective			Internal Medicine	✔ Active
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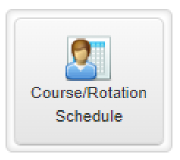
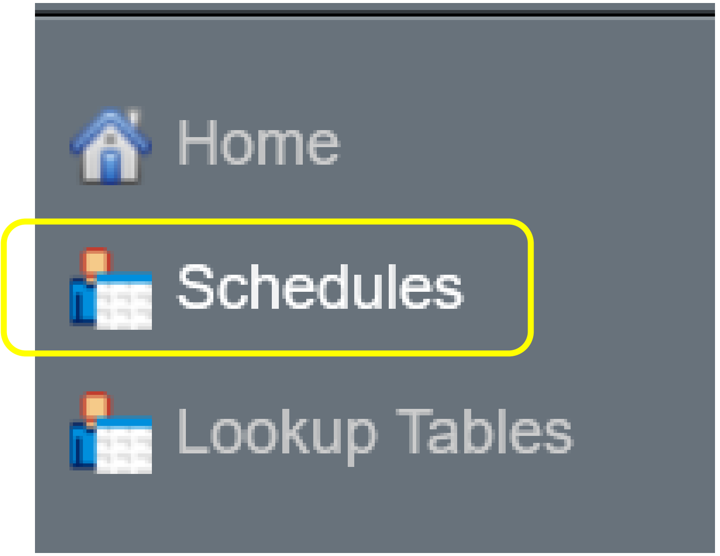
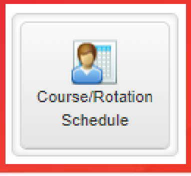




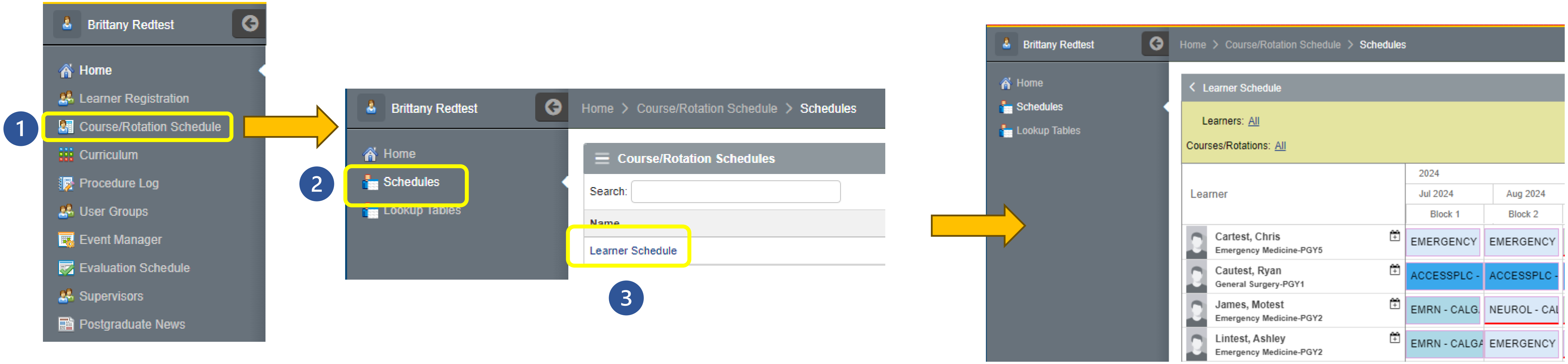
Schedules

IMPORTANT NOTICE

- Rotation schedules for your residents based on the schedule information provided to PGME in June/July
- Any modifications made since then will not be reflected
- **You can update your resident schedules**
- Errors in a resident schedule for the 2024/25 academic year will NOT impact assessments, however EPAs do show the rotation on which they were completed, so this information will be inaccurate if the rotation schedule is inaccurate
- **Accurate rotation schedules will be critical in future academic years** when rotation assessments are completed within MedSIS (these will remain in one45 for the 2024/25 academic year)
- The schedules in UAT will often be wrong – we use them to practice

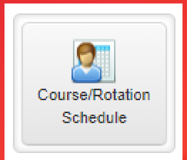


Course/Rotation Schedule > Schedules

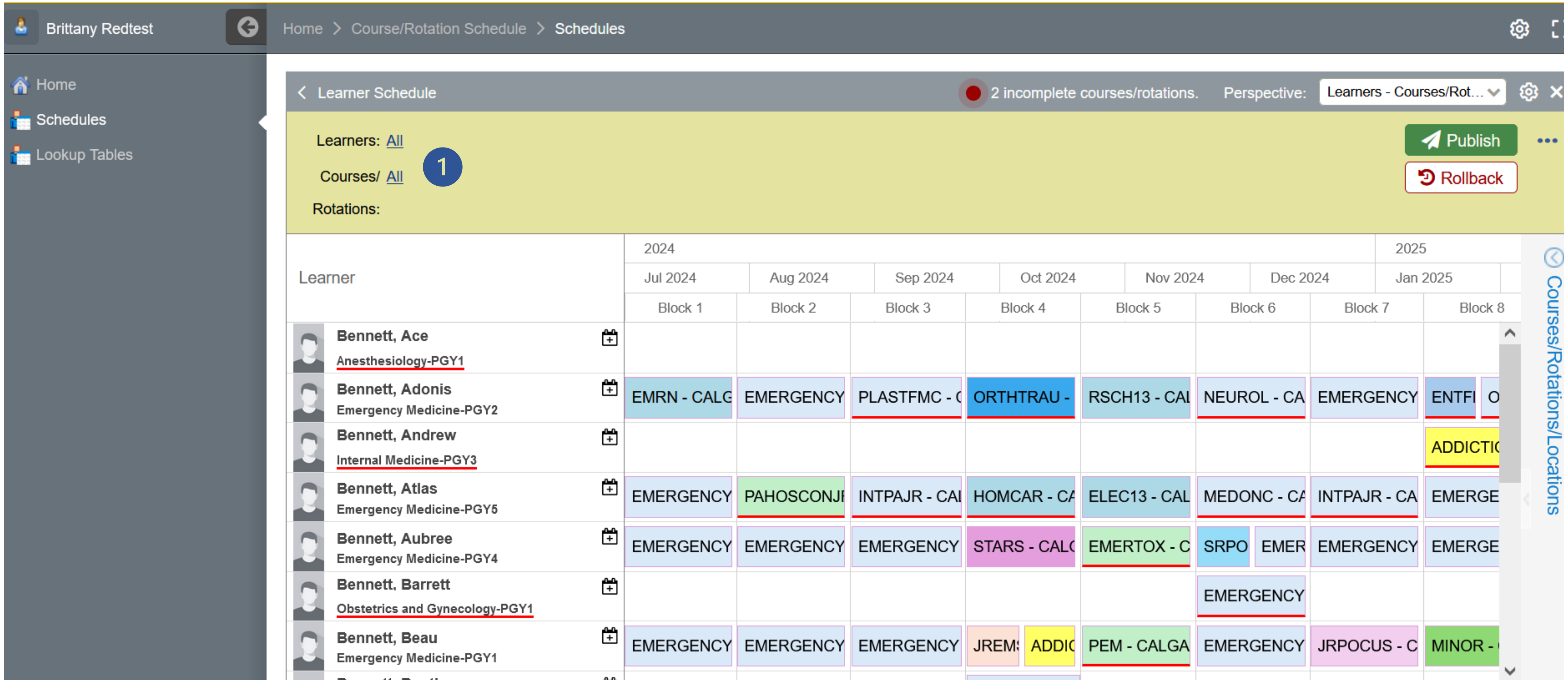


To view rotation schedules:

1. Select Course/Rotation Schedule
2. Select Schedules
3. Select Learner Schedule

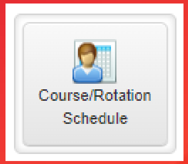


Course/Rotation Schedule > Schedules



This brings you to an unfiltered view – it will contain a list of all of your residents as well as all off-service residents who are doing a rotation that is “owned” by you

You can filter your view by learners as well as rotations (called courses) by clicking “All” 1



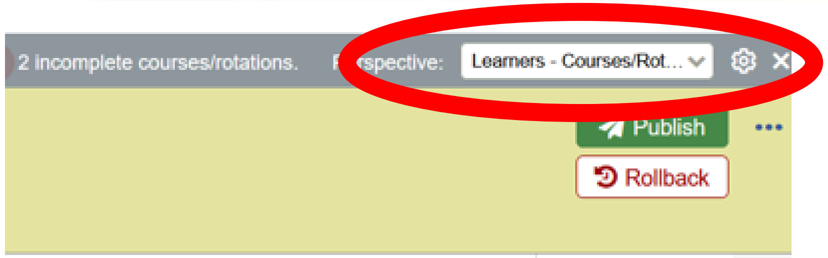
Seeing your home resident’s schedules

I just want to see my home resident’s schedules…

How do I do that?

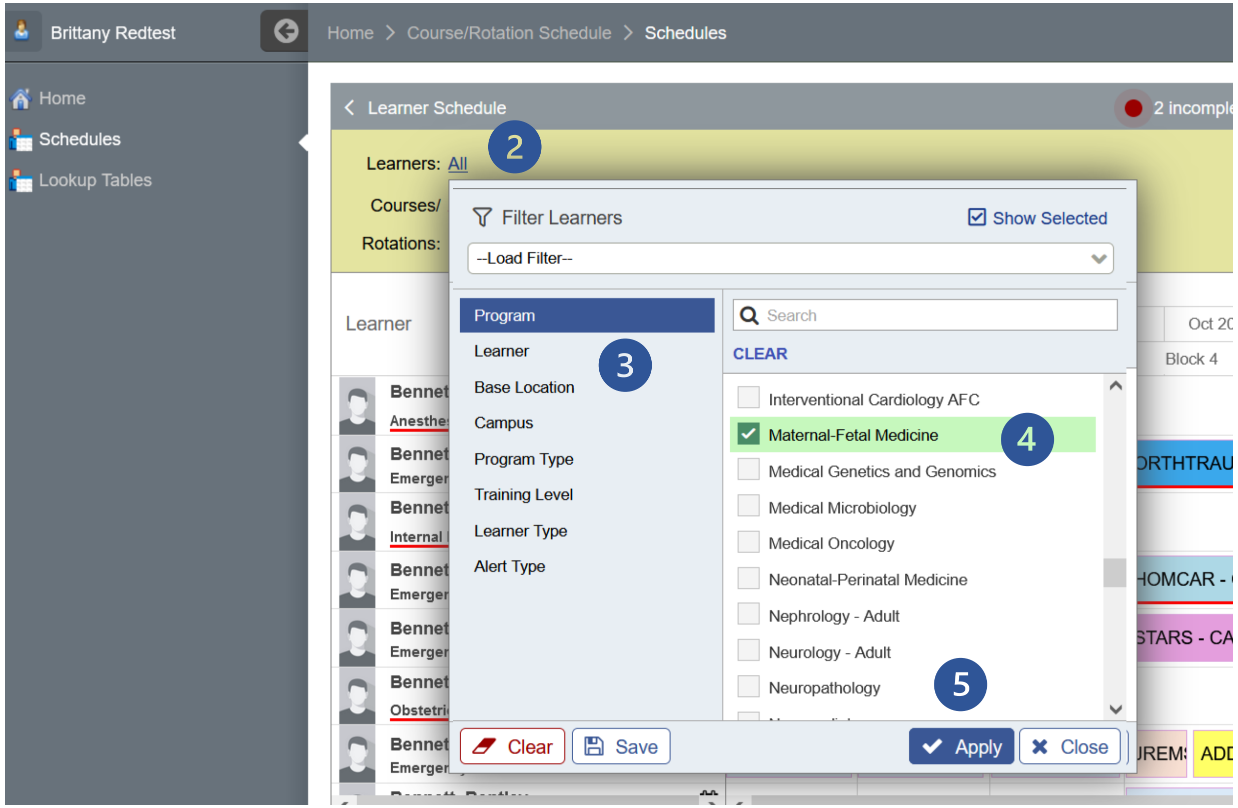
Course/Rotation Schedule

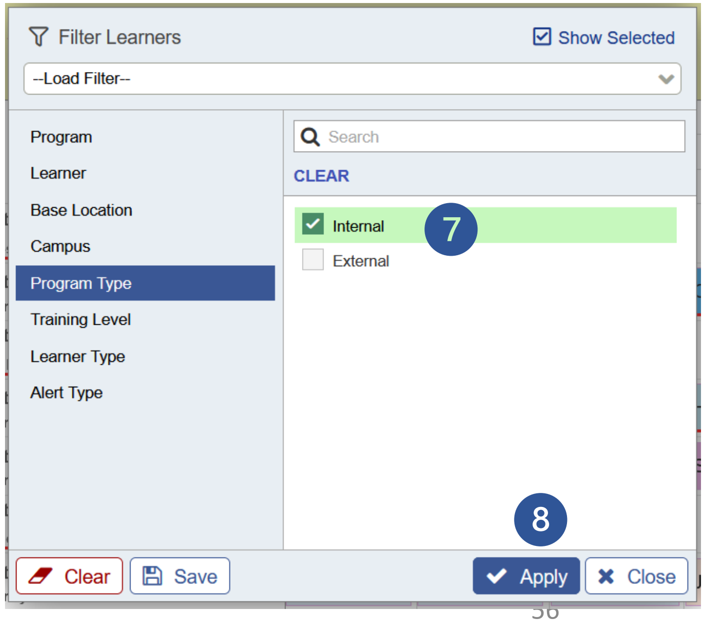
Course/Rotation Schedule > Schedules
Filtering Rotation Schedules by Program and Program Type

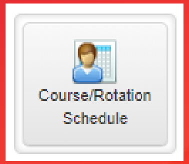


1 Toggle Perspective to Learners – Courses

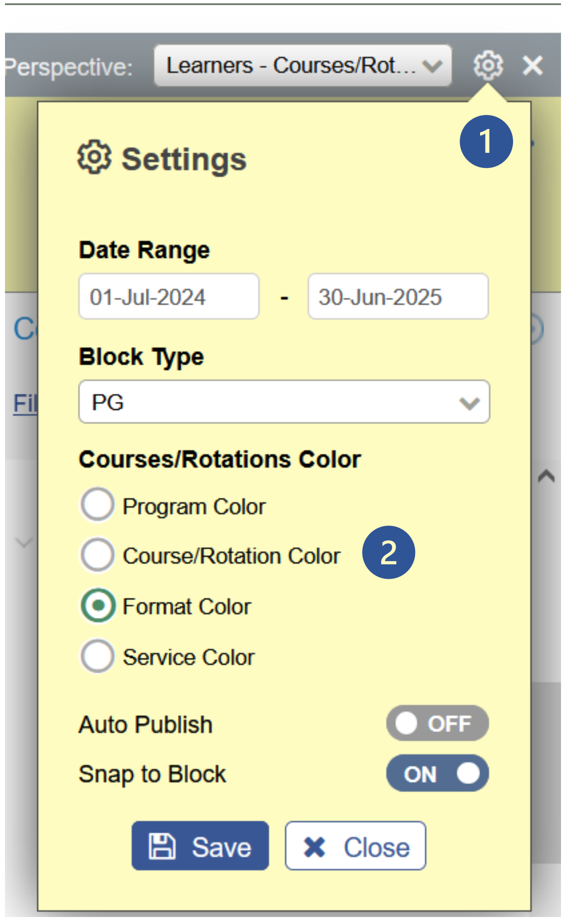
2 Click All (beside Learners)
3 Click on Program
4 Select your home program
5 Select Apply
6 Click on Program Type
7 Select Internal
8 Apply







Want different colors for your rotations?



1. Click on the Gear
2. Select Course/Rotation Color

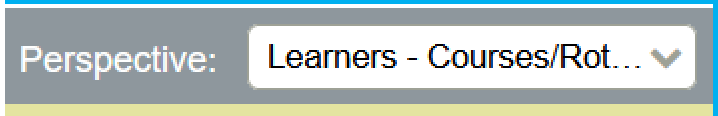
DEMO – Rotation Schedule: Learner perspective

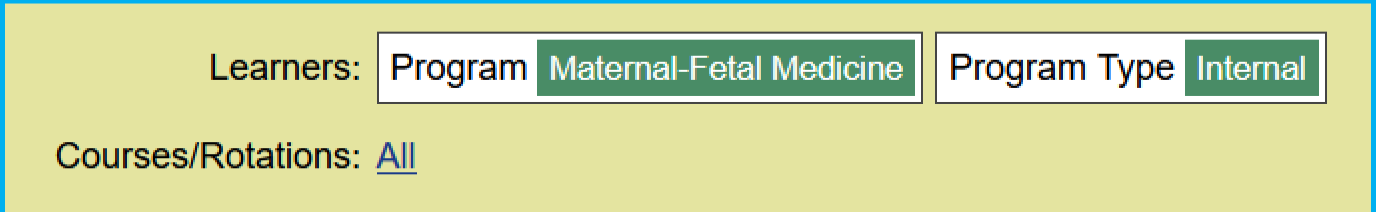
- Open rotation schedule
- Toggle to learner perspective
- Filter Learners, by Program and Program Type = Internal
- Set color choice to rotations

7

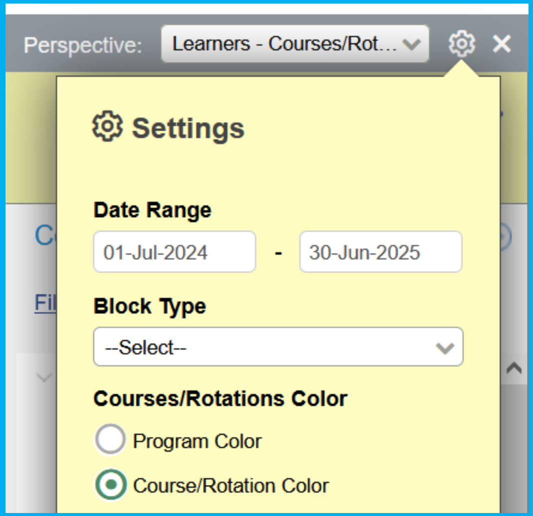
Practice

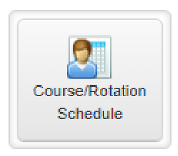
- Take a few minutes to generate a view that includes just your home program resident schedules





- Now add some color!





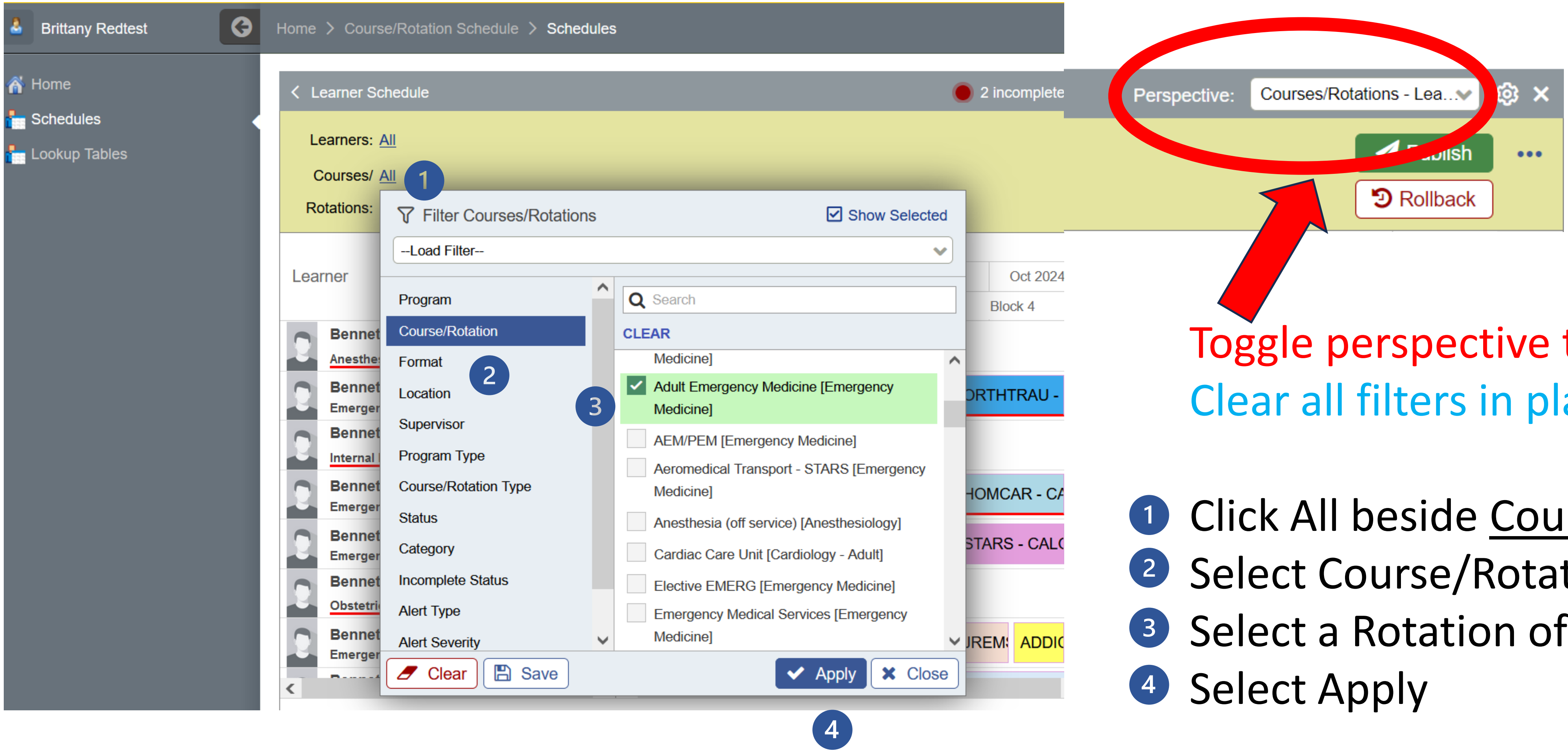
Viewing the learners coming to a rotation by block

I manage a rotation that has lots of visiting off service learners rotating though

Can I see a view that combines home and off-service learners on a rotation?

Course/Rotation Schedule

Course/Rotation Schedule > Schedules
Filtering Rotation Schedules by Rotation

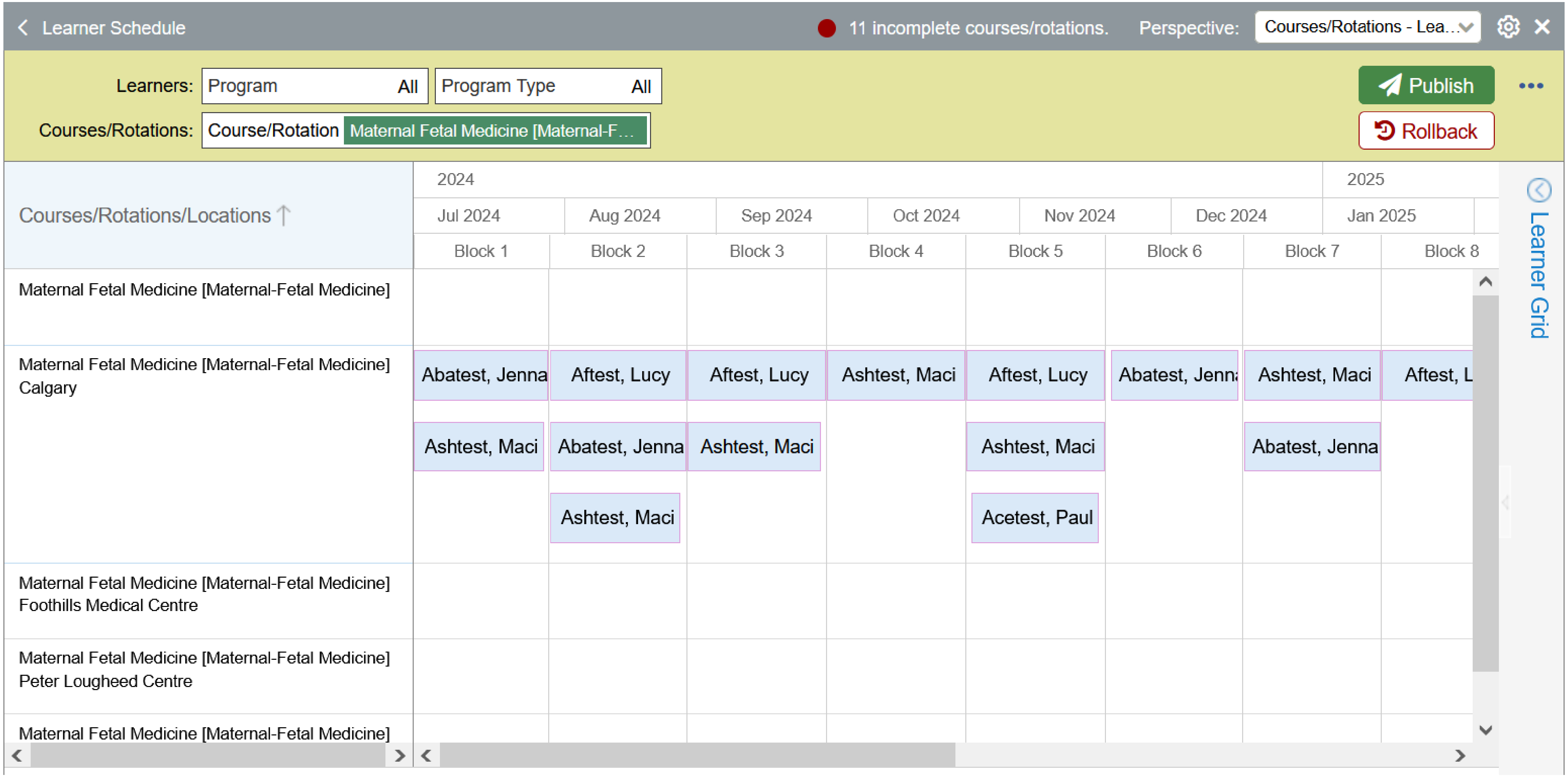


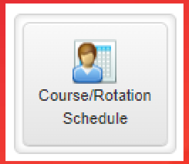
Toggle perspective to Courses/Rot

Clear all filters in place

1. Click All beside <u>Courses</u>
2. Select Course/Rotation
3. Select a Rotation of interest
4. Select Apply

Course/Rotation Schedule > Schedules
Filtering Rotation Schedules by Rotation



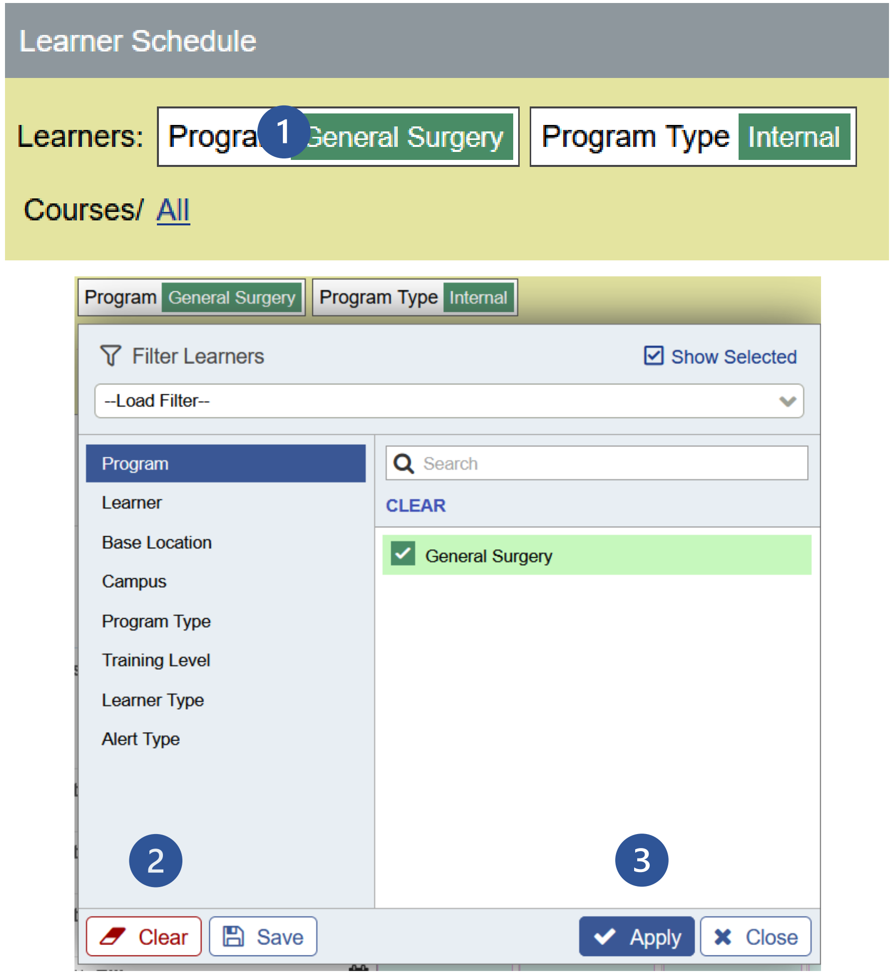


Course/Rotation Schedule > Schedules
Filtering Rotation Schedules by Rotation

Can't find what you are looking for?

Trying clearing your filters:

1. Click on any filter
2. Select Clear
3. Select Apply



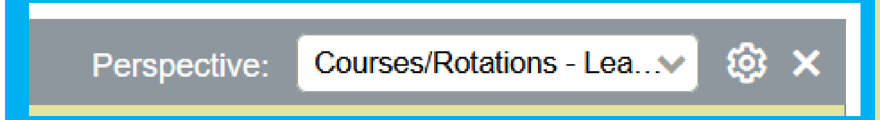
DEMO – Rotation schedule: Rotation perspective

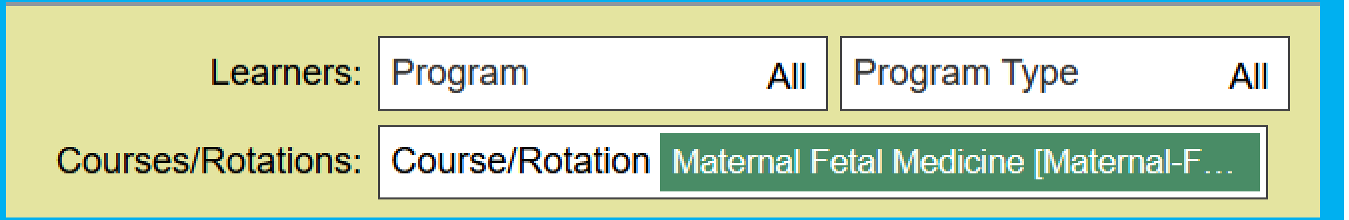
- Open rotation schedule
- Toggle to course/rotation perspective
- Filter by Course/Rotations – select a rotation

8

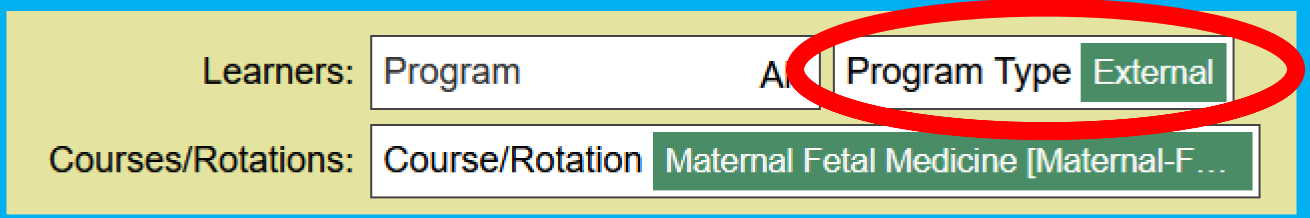
Practice

- Take a few minutes to generate a view that shows your residents by block – if you target a minimum or maximum number of residents per block, this view will help you

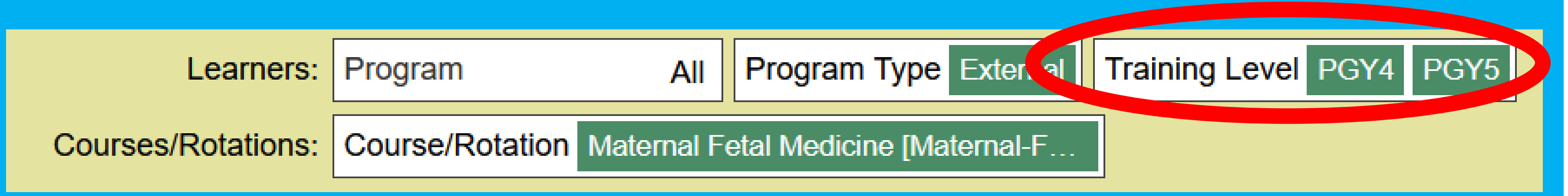


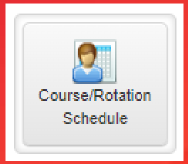


- Now filter that view to see only your off service residents



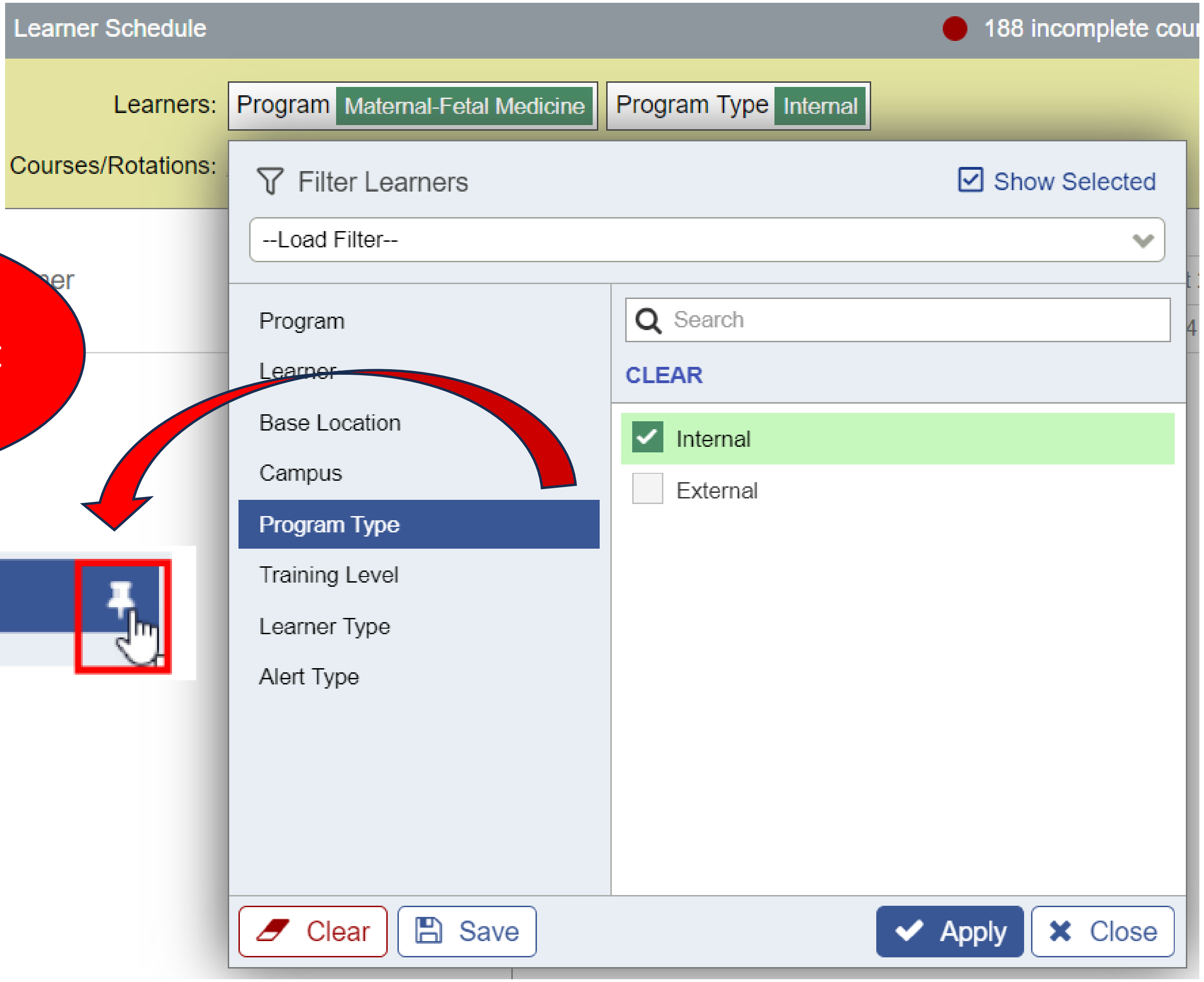
- Need a minimum # of seniors to cover the service? Filter by PGY level

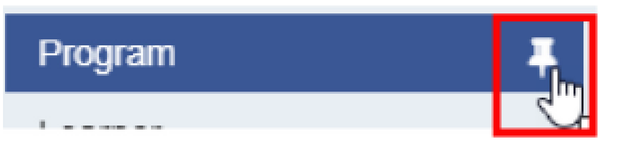


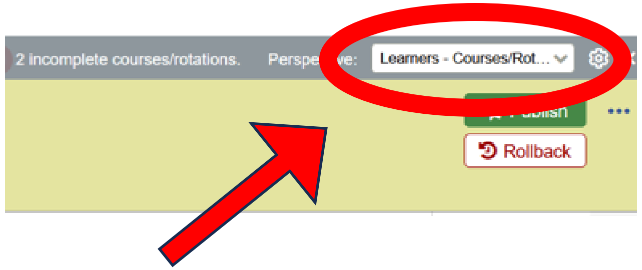


Pinning Filters

You can pin selections that you like





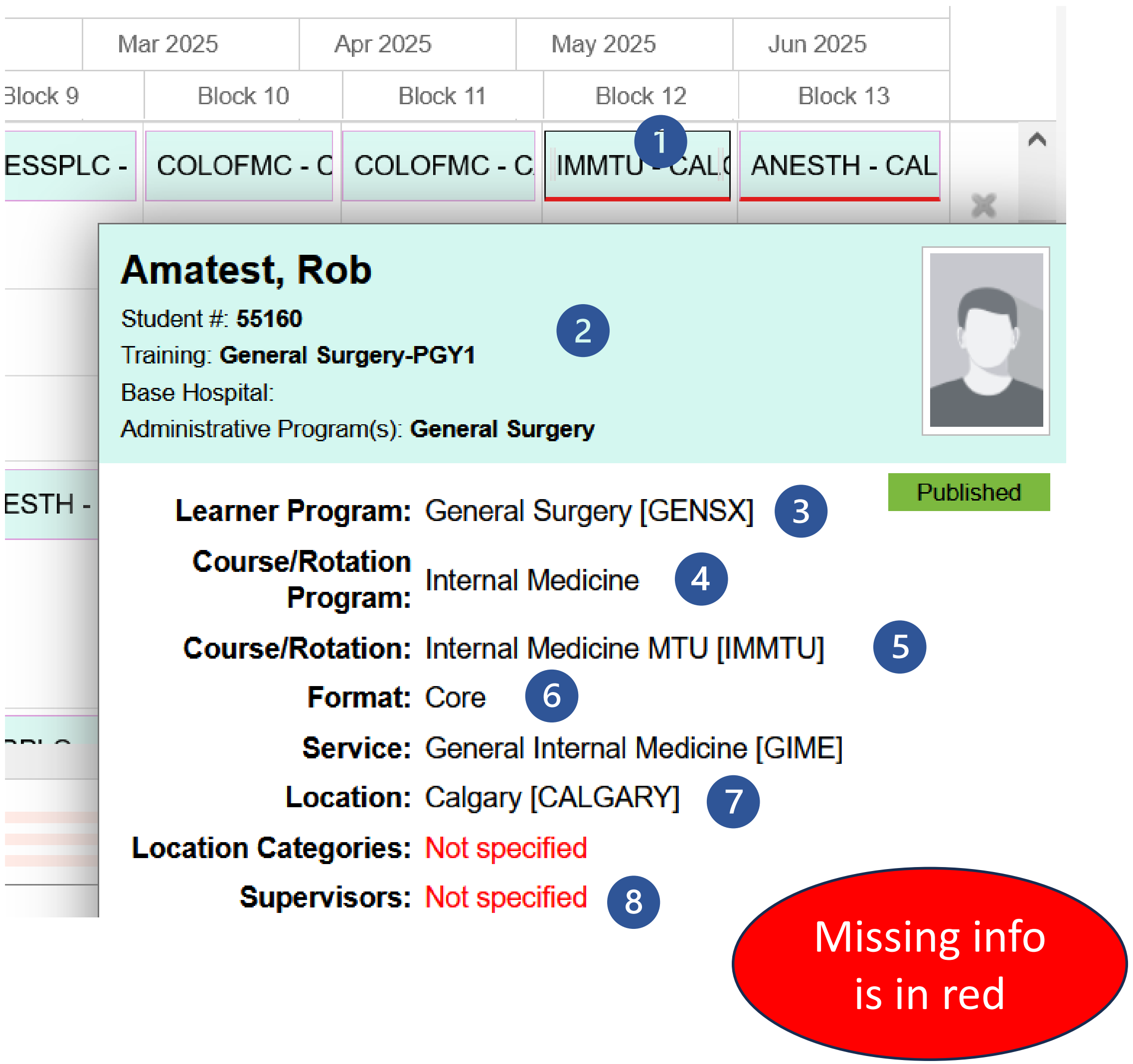


Caution: Pinned filters carry over from one Perspective to the other when you toggle between them

Not ideal, but that's how it works – so likely best to pin the filters in the view that you anticipate being in most

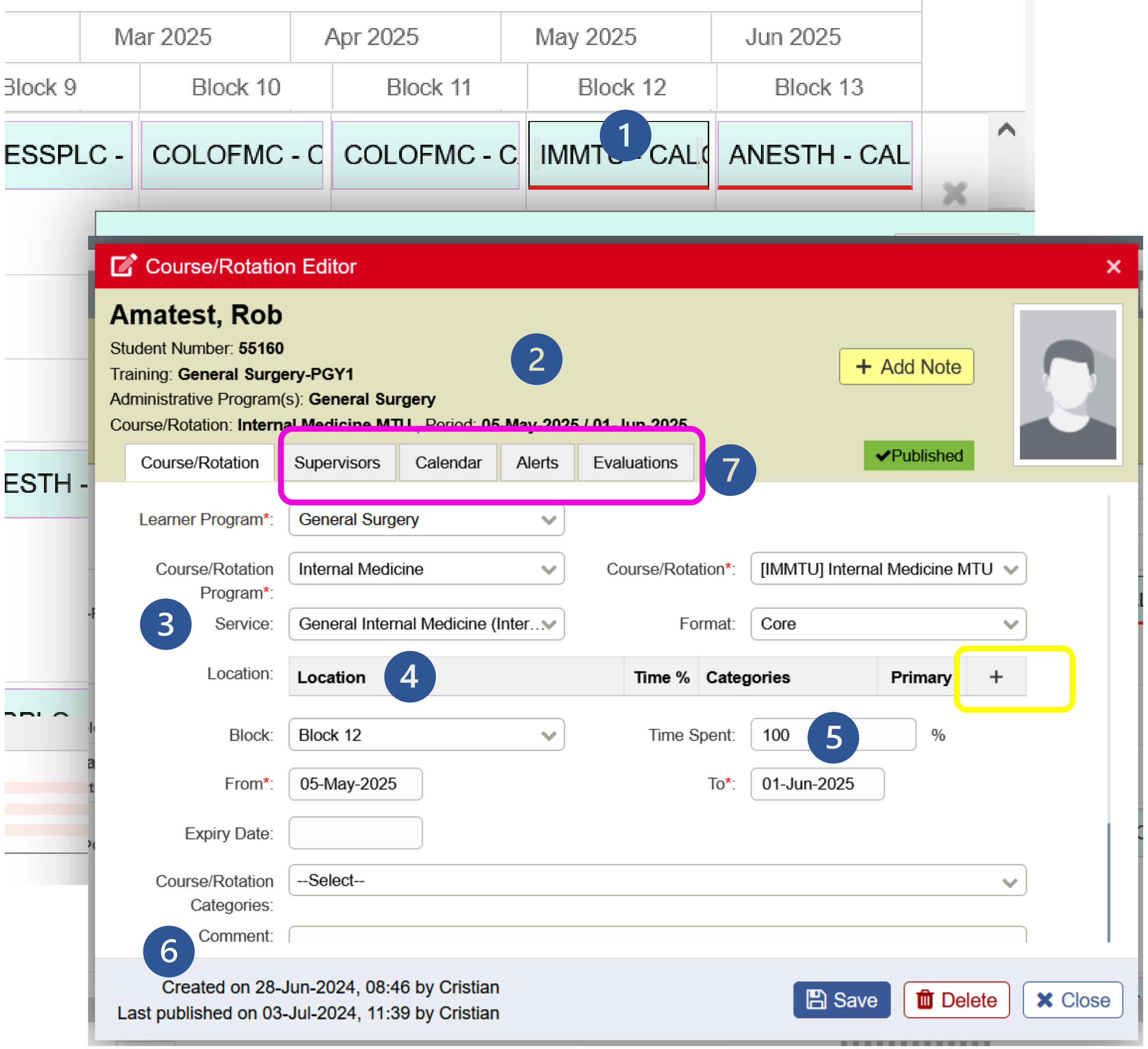
Course/Rotation Schedule

Course/Rotation Schedule > Schedules
Viewing rotation information – Quick View

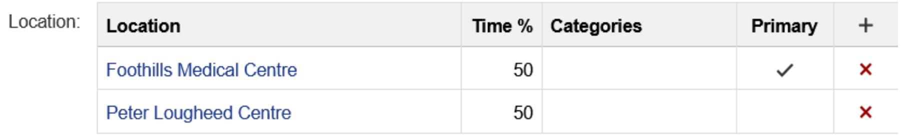


1. **Hover over** a rotation to see a pop up with more info
2. Resident demographics
3. Home program
4. Program who owns the rotation
5. Name of rotation
6. Format (e.g. core, elective, selective)
7. Location
8. Supervisors – these can be configured as needed – this is not needed for MedSIS launch – more training will be provided in spring on this feature as it will be needed for form send outs (Rotation evaluations etc)

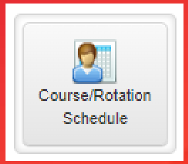
Course/Rotation Schedule > Schedules
Viewing rotation information – Detailed info



1. **Click** on a rotation to see a pop up with more info
2. Resident demographics
3. Rotation information
4. Location can be single or multi-site. To add location, select the + sign and enter locations and % of time



5. The % of time spent on this rotation can be adjusted – for example if a resident is doing a split rotation – half research, half clinics, both rotations can be present for the block with each set to 50%
6. Comments can be added here
7. Additional tabs NOT needed for MedSIS launch – more training will be provided in spring



Editing and Viewing rights

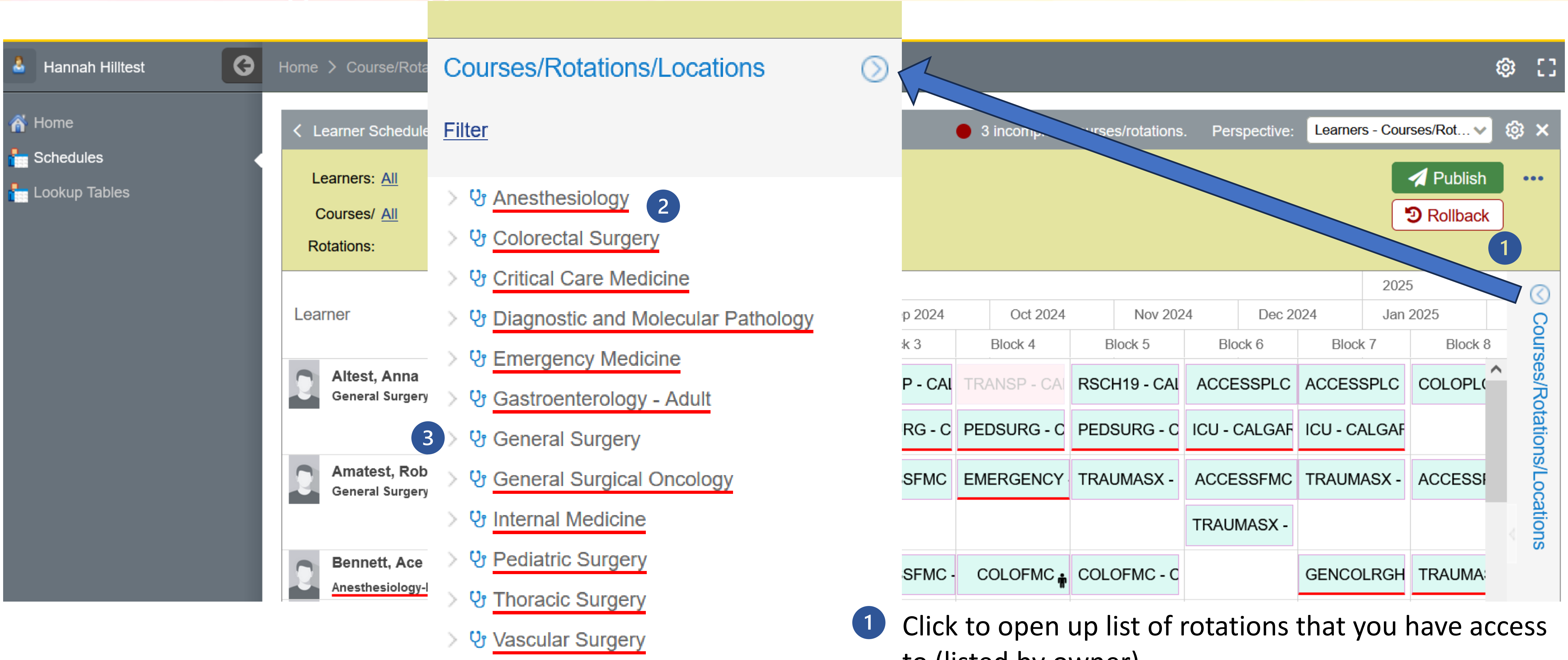
- As a PA, you have viewing AND editing rights to the rotation details of your home program residents
- You have viewing and LIMITED editing rights to the rotation details of off service residents
  - You can add supervisors in the Supervisor tab

9

EXPLORE

- Take a few minutes to hover over a few rotations
- Then click on a couple to view the rotation info

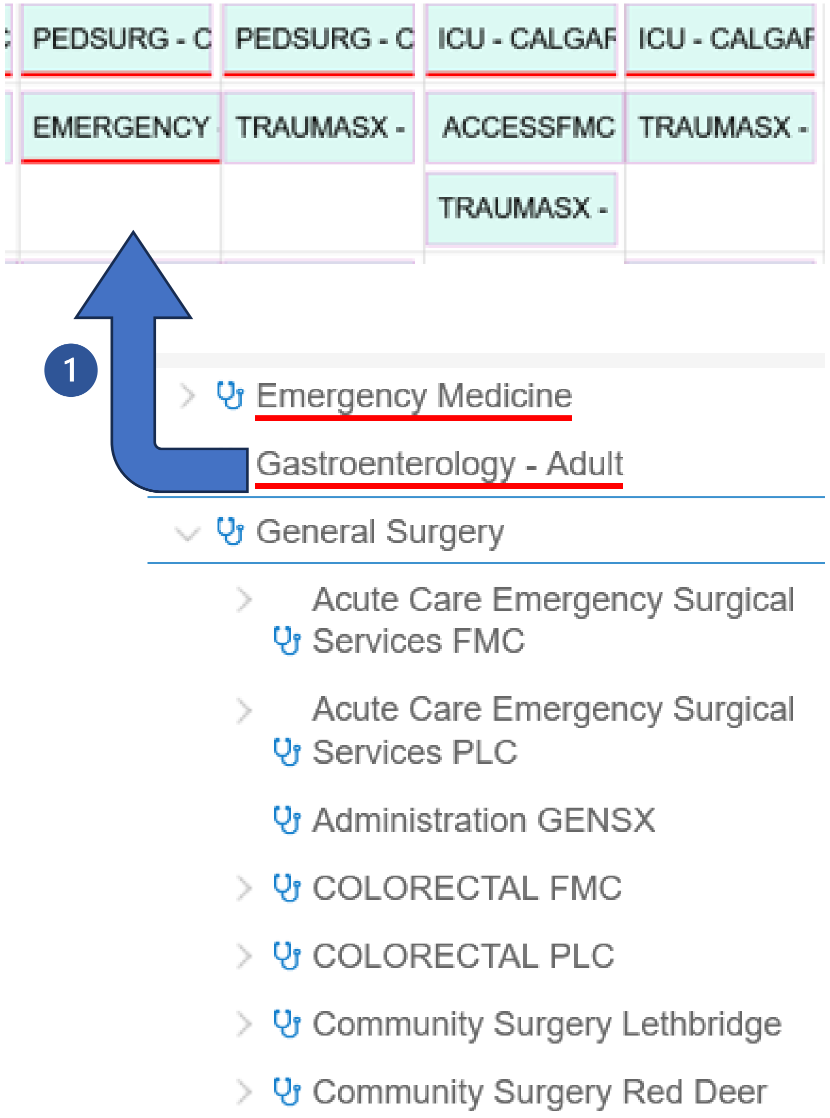
Course/Rotation Schedule > Schedules
Making changes to a resident's rotation schedule

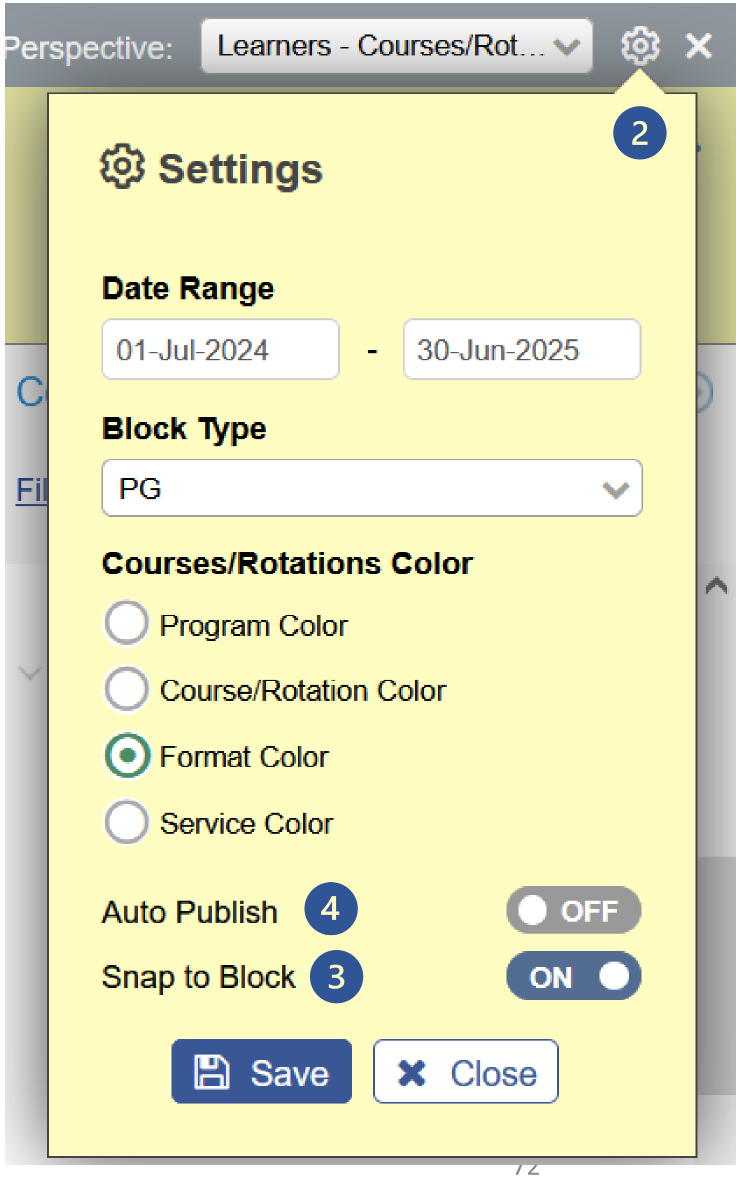


1. Click to open up list of rotations that you have access to (listed by owner)
2. Off service programs are underlined in red
3. Click > to open up available rotations (see next slide)

Course/Rotation Schedule > Schedules
Making changes to a resident's rotation schedule

1. Rotations can be clicked, dragged and dropped into a block
2. Select gears to open up additional options
3. Snap to Block will place the rotations in the pre-defined block dates. Toggle to OFF if you wish to place the rotation into dates that do not match the block dates
4. Auto Publish – keep to OFF while working – then others cannot see your work (when published, everyone can see the schedule)

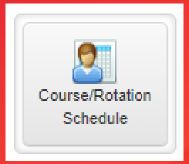


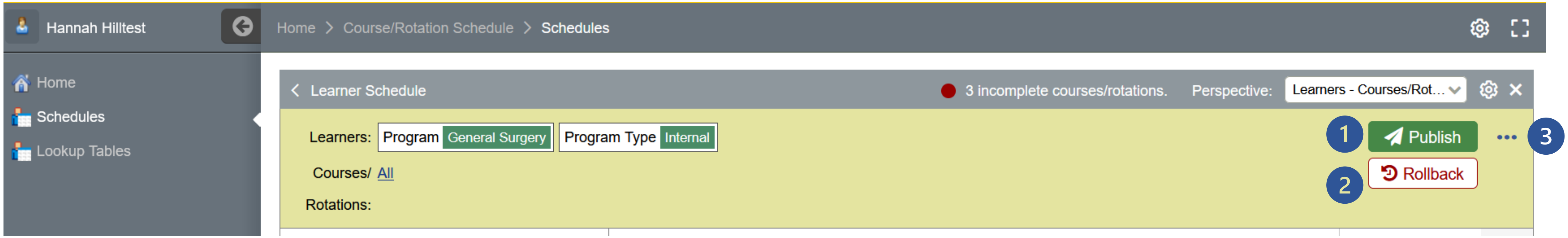


DEMO – Adding/Removing Rotations

- Add a rotation
- Remove a rotation
- Demonstrate how to publish

Course/Rotation Schedule > Schedules Publish and Role Back

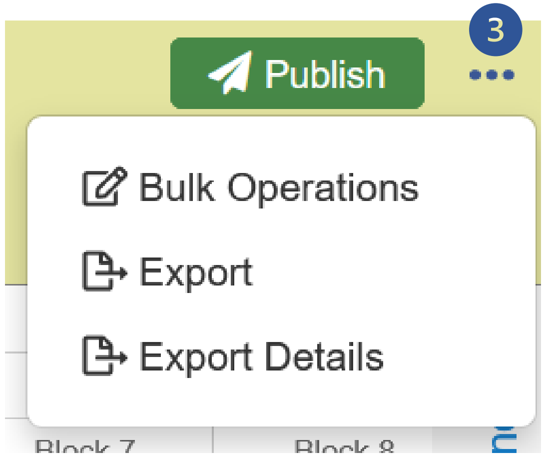




1. Publish – allows residents to see their schedule

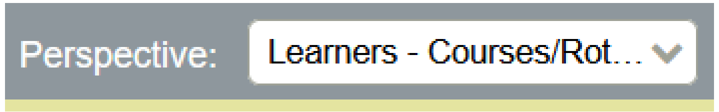
2. Rollback is similar to “undo” – it brings you back to your most recent published version (cannot be undone – ie the is no “redo”, so be careful!)

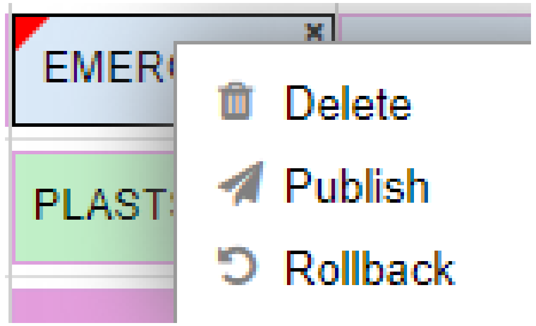
3. Select 3 dots then Export to download an excel copy of the schedule

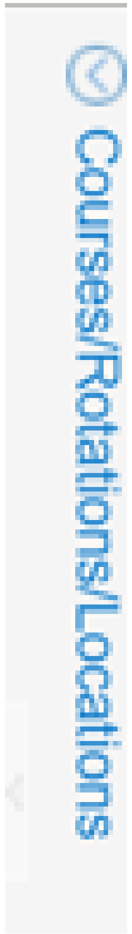


Practice

- Navigate back to your Learner Perspective
- Delete a rotation (right click)
- Drag and drop a new rotation in from the side bar



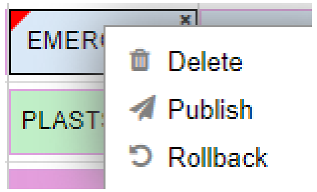




Course/Rotation Schedule

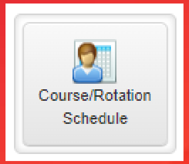
Rotation Icons

Icon	Description
Color	The System Administrator configures the colors for each course/rotation. They are used differently by each program but can be used to differentiate between course/rotation, format, service, or programs.
AUMASX	The person icon indicates that a **supervisor** has been added to this course/ rotation *(not important now, but will be next year)*
TRAUMASX	A red triangle in the top left-hand corner of the course box indicates that this course/rotation is **unpublished**.
PEDanesth - C	A red line at the bottom of the course/rotation box shows that this rotation is an **off-service** rotation (external to your program)
Arttest, Haptest	A red line below a resident name shows that this learner is an **off-service** resident (external to your program)
ICU - FMC	A "double location" icon indicates the rotation is in several locations
	A greyed-out box indicates that the learner does not have a training line covering this period and a course/rotation cannot be scheduled.
	A striped box indicates that the learner is on leave (maternity, parental, medical, unpaid, etc.) for that period.
ENCY	The X on the top corner of a rotation indicates that the course/rotation is incomplete and there is an alert for that incomplete course/rotation. Hover a course/rotation schedule to see the missing information in red.

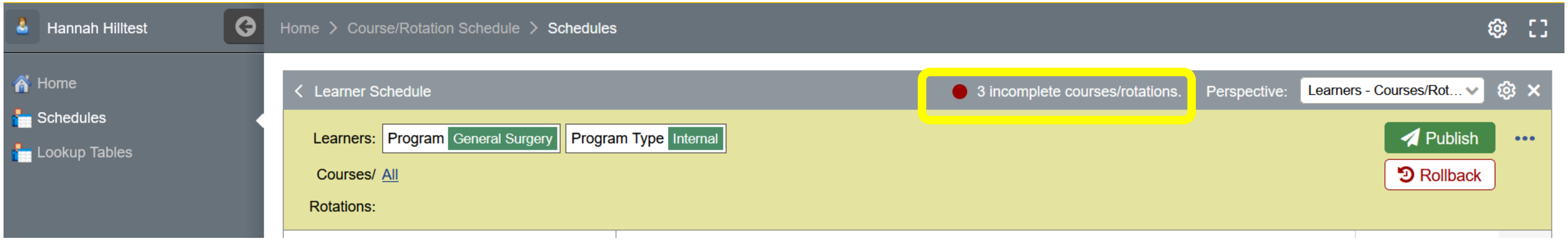


Note:

- Each time you do a change to a rotation and the top left triangle appears, click right on the rotation to republish it.
- When you "delete" a rotation, you need to click right and click on "publish" to validate your action



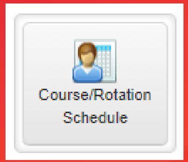
Incomplete rotation Alert



Click the **Incomplete courses/rotations alert** to see incomplete rotations

Rotations are incomplete if:

- Information on service, format, location, or supervisor is missing
- The rotation has more than one location assigned and the time % for each location does not sum to 100%
- The learner has two overlapping rotations with a sum of time over/under 100

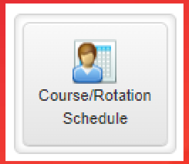


Incomplete Rotations – Does it matter?

- For 2024-2025, incomplete rotations will not impact things
- In spring, when you create your 2025-2026 schedule, it will matter

- So, we recommend using the next 6 months to practice
  - Update schedules this year as changes occur

- We will provide more training on the rotation schedule module in spring (we will teach you how to replicate what you currently do in one45)
  - How to add supervisors and rotation evaluators
  - How to create automatic form send outs



Rotation Schedule Building – just an FYI for future

There are three ways to build a schedule for a learner:

1. Dragging a course/rotation or a learner directly to the roster
2. Copying a schedule from one learner to another
3. *Importing data from an LGI template (requires PGME IT resources – may explore possibility for very large programs)*

For this year, the PGME Office has imported your program rotation schedules

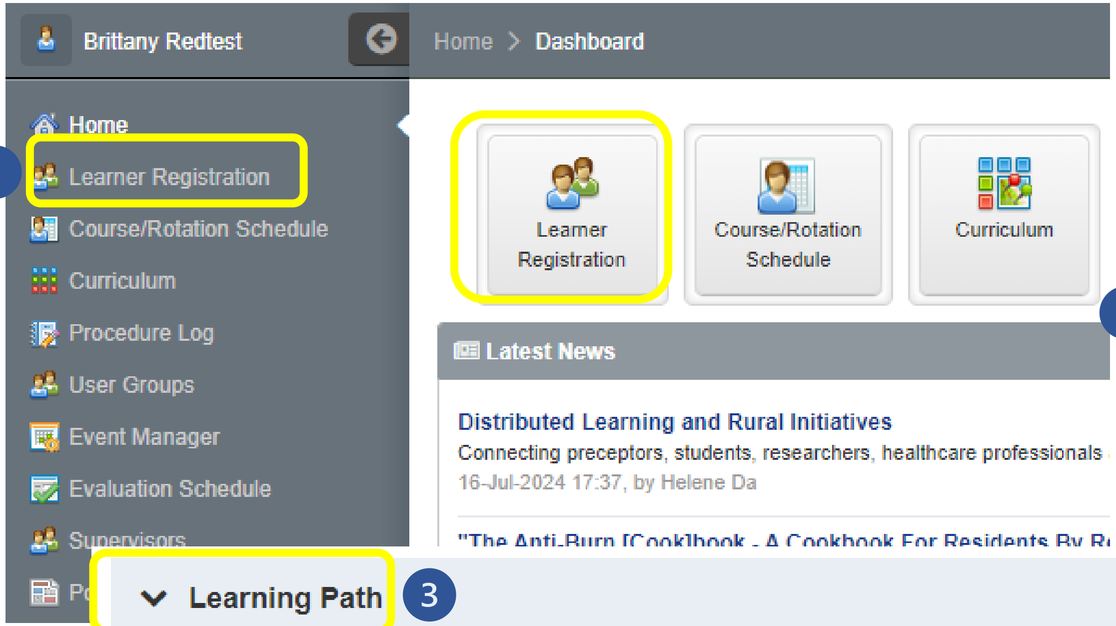
We will teach you how to do it in the spring

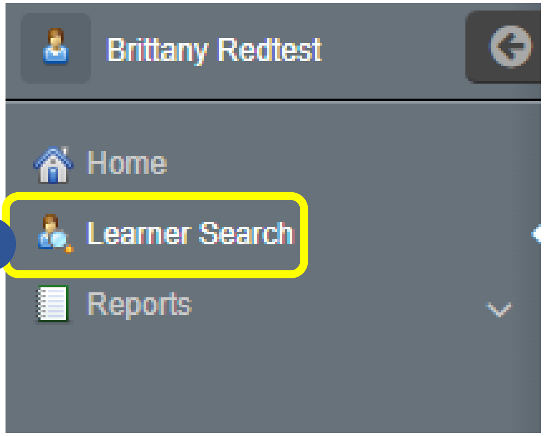

Learner
Registration

Learner Registration Module

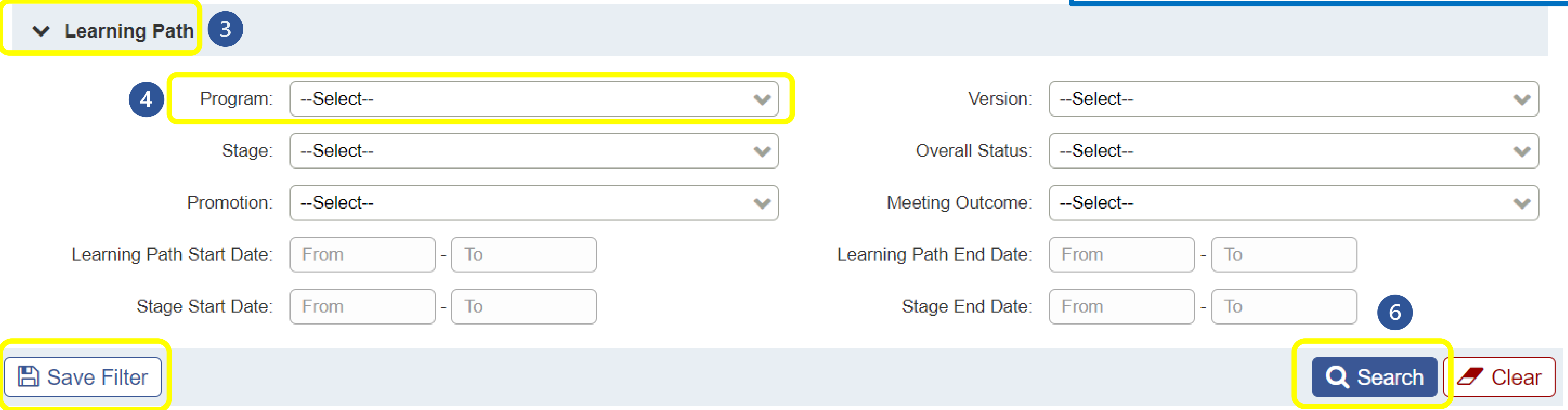
- Permits another way to see all of your residents
- You can load them and scroll through them easily
- You can see full administrative details
- You can use this to verify that they have been configured with the correct:
  - Academic advisor/coach
  - Learning Path(s)
  - Start/End dates
  - PGY-level

Finding your Residents in Learner Registration

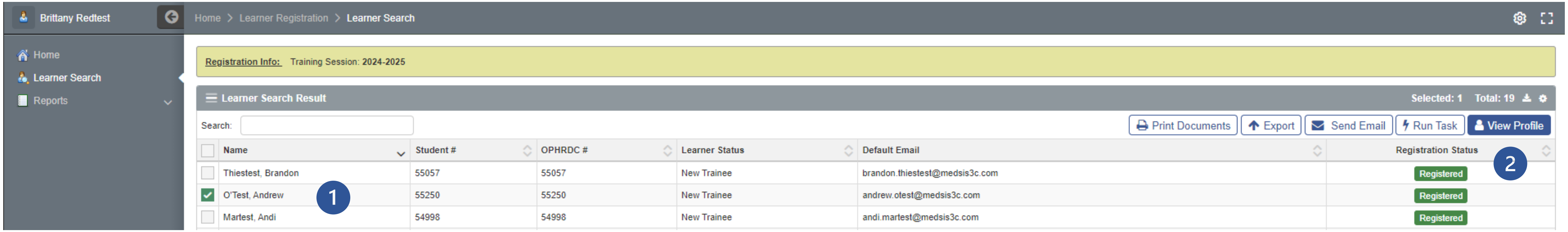




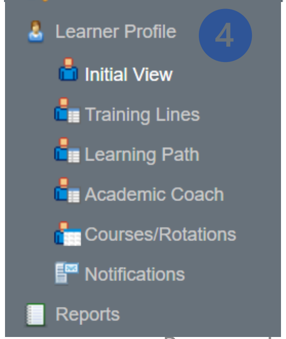
1. Go to Learner Registration
2. Go to Learner Search
3. Open Learning Path
4. Select your program
5. Click Save Filter (optional)
6. Click Search



Finding your Residents in Learner Registration



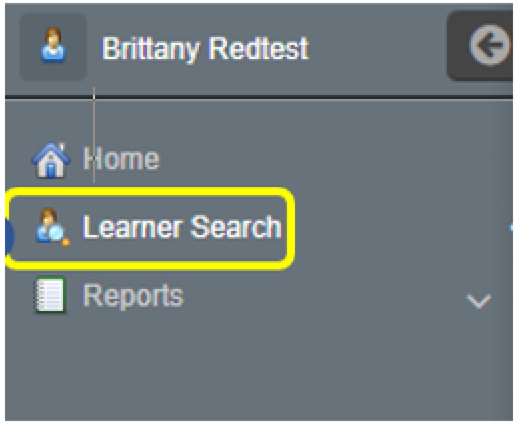
1. Click (check) beside all of the residents that you would like to view
2. Click View Profile

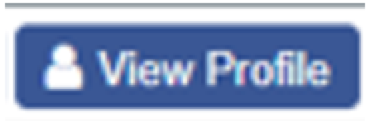


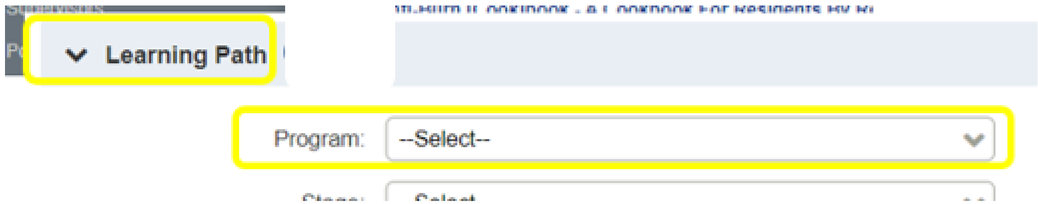
The first resident will load

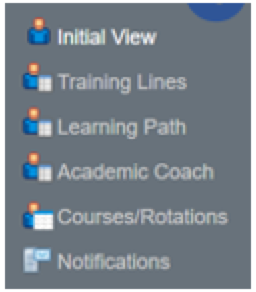
3. Use the arrows to scroll through your residents
4. Explore subfolders in Learner Profile on left side bar

DEMO – viewing residents in registration module



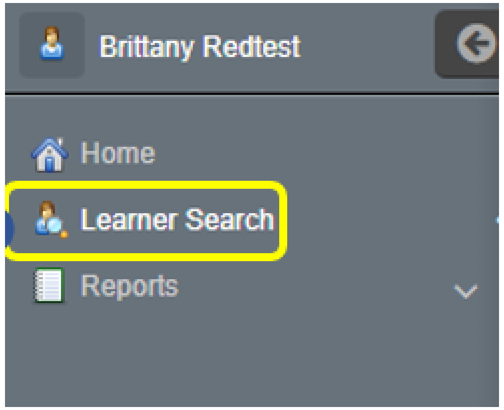


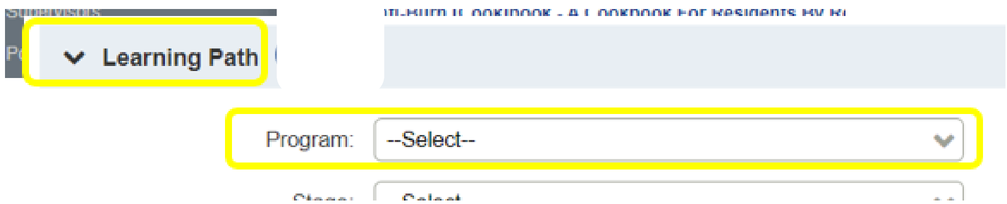


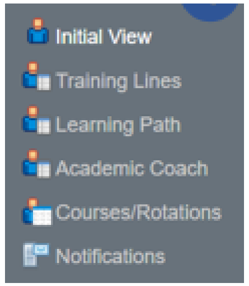


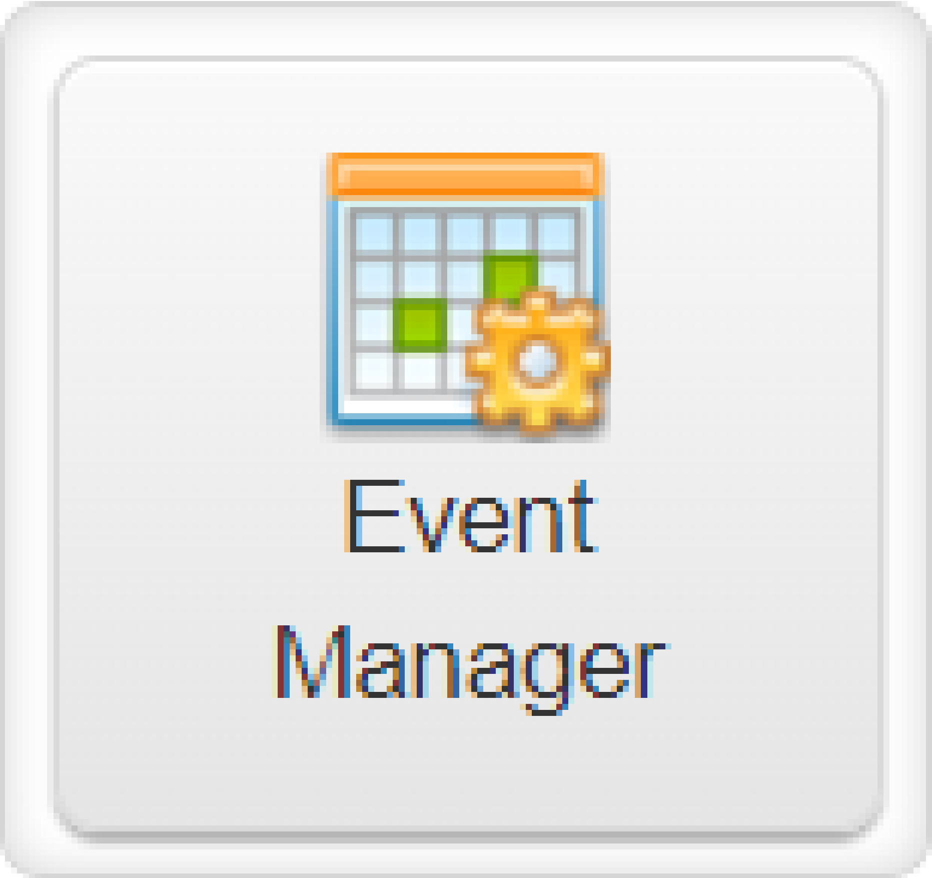
Practice

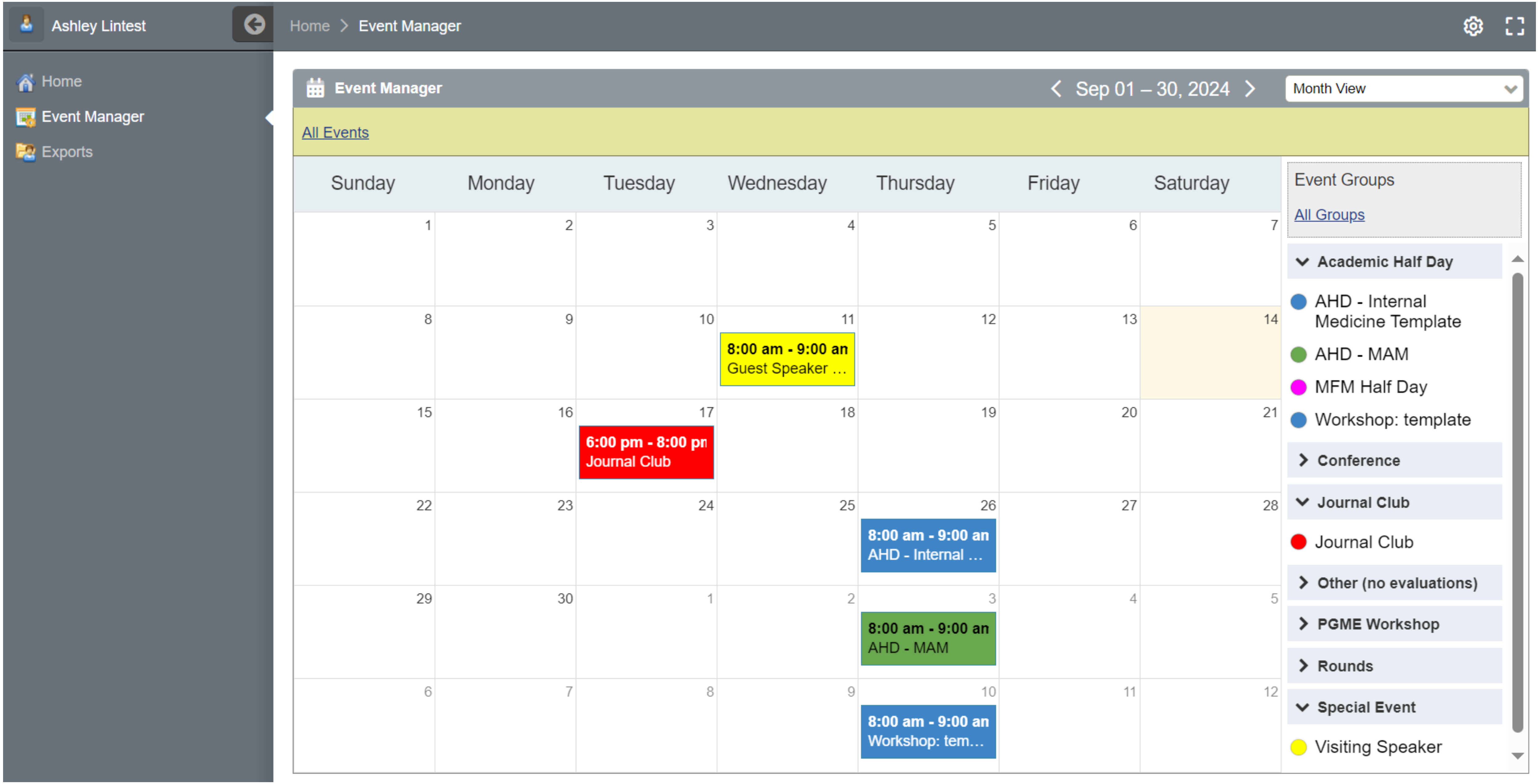
- Go to the Registration Module
- Find your residents (or a selection of them)
- View their profiles
- Scroll through the residents
- Explore the subfolders in a Learner Profile








Event
Manager


Ashley Lintest
Home
Event Manager
Home
Event Manager
Exports
Event Manager
Sep 01 – 30, 2024
Month View
All Events
Sunday
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
8:00 am - 9:00 an
Guest Speaker …
6:00 pm - 8:00 pn
Journal Club
8:00 am - 9:00 an
AHD - Internal …
8:00 am - 9:00 an
AHD - MAM
8:00 am - 9:00 an
Workshop: tem…
Event Groups
All Groups
Academic Half Day
AHD - Internal Medicine Template
AHD - MAM
MFM Half Day
Workshop: template
Conference
Journal Club
Journal Club
Other (no evaluations)
PGME Workshop
Rounds
Special Event
Visiting Speaker

DEMO – Event Manager