

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)

MedSIS 3C Campus Edition | CUMMING SCHOOL OF MEDICINE UNIVERSITY OF CALGARY

Hannah Hilltest | Home > Dashboard

Navigation Menu:

- Home
- Learner Registration
- Course/Rotation Schedule
- Curriculum
- Procedure Log
- User Groups
- Event Manager
- Evaluation Schedule
- Supervisors
- Postgraduate News

Main Content Area Icons:

- Learner Registration
- Course/Rotation Schedule (highlighted with green box)
- Curriculum (highlighted with green box)
- Procedure Log
- User Groups
- Event Manager (highlighted with yellow box)
- Evaluation Schedule
- Supervisors
- Postgraduate News

Latest News

Distributed Learning and Rural Initiatives
Connecting preceptors, students, researchers, healthcare professionals and rural communities.
16-Jul-2024 17:37, by Helene Da

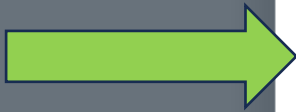
"The Anti-Burn [Cook]book - A Cookbook For Residents By Residents
As part of a PARA Wellness Grant, Pediatrics Resident, Meagan developed a homemade recipe book to help residents have healthy food while on call.
16-Jul-2024 09:54, by Helene Da

Please go to Curriculum > User Groups



Curriculum

- Home
- Learner Registration
- Course/Rotation Schedule
- Curriculum
- Procedure Log
- User Groups
- Event Manager
- Evaluation Schedule
- Supervisors
- Postgraduate News
- Reporting
- Supervisor Portal



- Home
- Program Curriculum
- Learner Curriculum
- User Groups
- Academic Coach
- Lookup Tables

User Groups



Viewing your CC membership

Hannah Hilltest Home > Curriculum > User Groups > Edit Group

1

2

User Groups Total: 57

Q Search X ... + Add New

Name	Type	Program
Anesthesiology CC	Competency Committee	Anesthesiology
Cardiac Surgery CC	Competency Committee	Cardiac Surgery

- 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*

The screenshot shows the 'Edit Group' page for 'General Surgery CC'. The left sidebar has 'User Groups' highlighted. The main content area shows the group details: 'Type: Competency Committee' and 'Program: General Surgery'. There are buttons for 'View Details', 'Delete', and 'Back'. A 'Bulk Assignment' button is circled with a blue '1'.

The screenshot shows the 'Bulk Assignment' dialog box. It has fields for 'Effective Date' and 'Expiry Date'. The 'Role' dropdown is set to 'CC Chair'. The 'Users' section has a search bar and a list of users with checkboxes. The users listed are: Chavez, Scarlett (CC Chair), Chavez, Summer (CC Chair), Leetest, Emily (CC Chair), Ritest, Rachel (CC Chair), and Smithtest, Elisabeth (CC Chair). The 'Save' button is circled with a blue '4'.

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

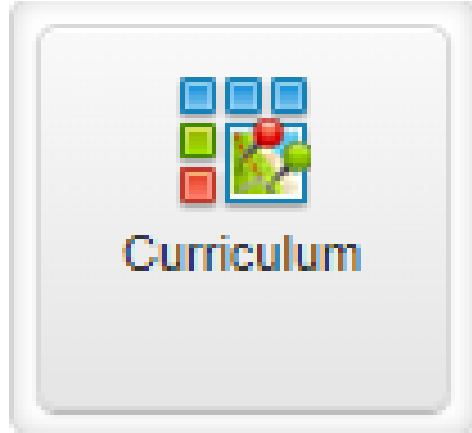
PRACTICE

Review your CC membership
(Not correct? – you can update after go-live)

Add a CC member
Remove a cc member

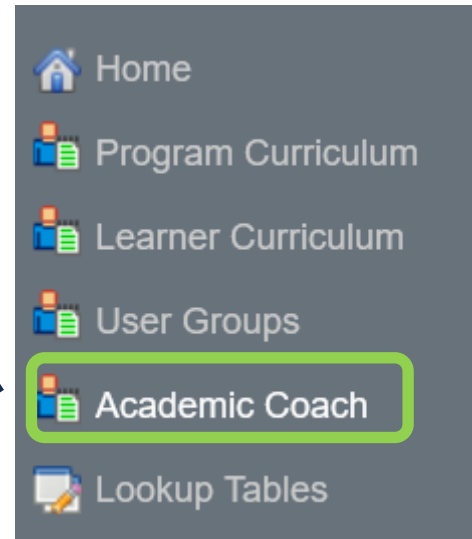
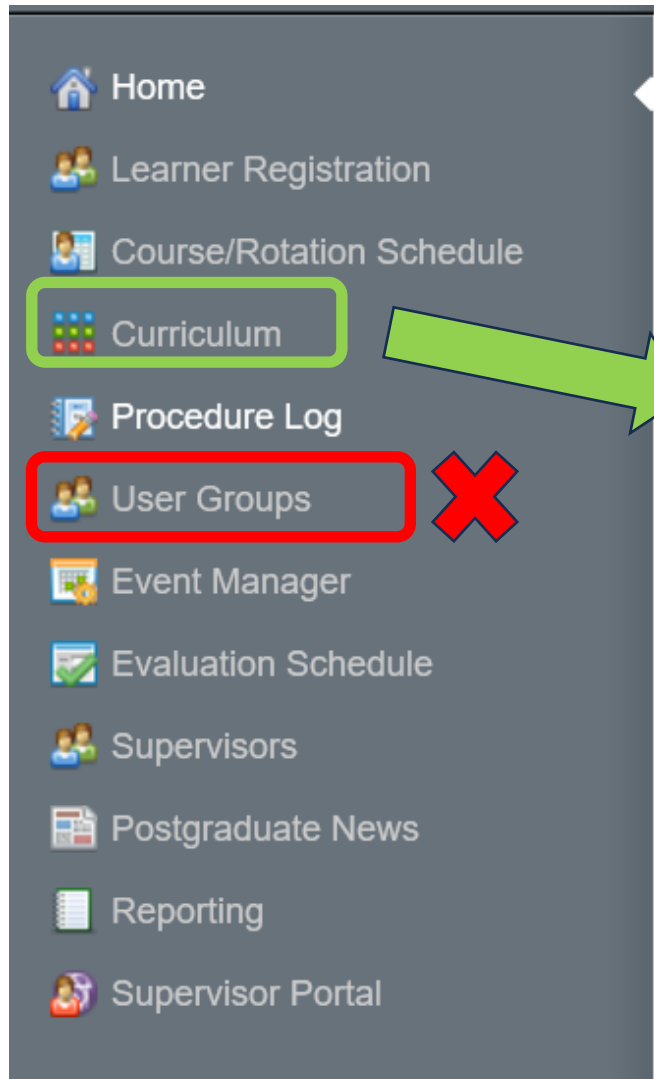
The screenshot shows the 'Edit Group' page for 'General Surgery CC'. The left sidebar has a 'User Groups' menu item highlighted with a yellow box. The main content area shows the group details: 'Type: Competency Committee' and 'Program: General Surgery'. At the bottom, there is a 'Bulk Assignment' button highlighted with a yellow box. The page also shows a table with columns for 'Name', 'Start Date', and 'End Date'.

The screenshot shows the 'Bulk Assignment' modal window. It has fields for 'Effective Date' and 'Expiry Date'. The 'Role' is set to 'CC Chair'. The 'Users' section has a search bar and a list of users with checkboxes: Chavez, Scarlett (CC Chair), Chavez, Summer (CC Chair), Leetest, Emily (CC Chair), Ritest, Rachel (CC Chair), and Smithtest, Elisabeth (CC Chair). There are 'SELECT ALL' and 'DESELECT ALL' buttons. At the bottom, there are 'Save' and 'Cancel' buttons.



Academic Coach

Please go to Curriculum > Academic Coach

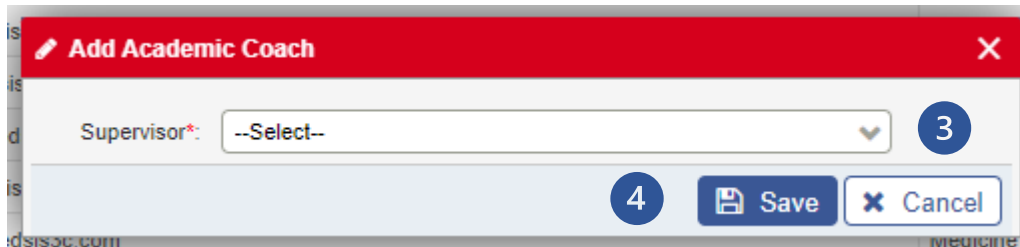
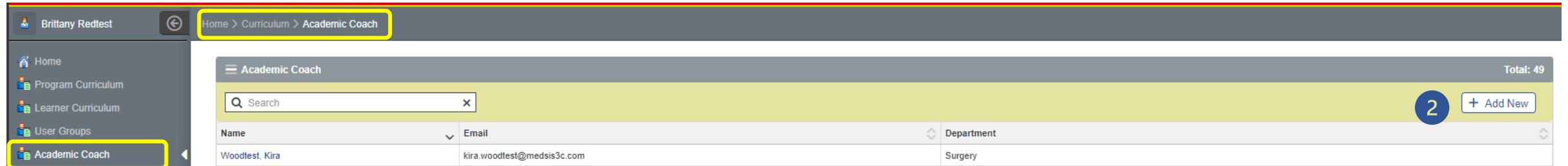


Academic Coach



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

The screenshot shows the MedSIS Academic Coach interface. The sidebar on the left contains navigation options: Home, Program Curriculum, Learner Curriculum, User Groups, and Academic Coach. The top breadcrumb trail shows the path: Home > Curriculum > Academic Coach. The main content area displays a table of academic coaches. A search bar is present, and a 'Bulk Assignment' button is visible. A modal window titled 'Bulk Assignment' is open, showing a list of learners to be assigned. The modal includes fields for Effective Date, Expiry Date, and a dropdown for Role. A list of learners is shown with checkboxes for selection. The 'Save' button is at the bottom of the modal.

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

Already assigned learners

DEMO – managing AAs

- Add a coach
- Add a learner to a coach

PRACTICE

Academic Coach Total: 49

Search

+ Add New

Name	Email	Department
Woodtest, Kira	kira.woodtest@medsis3c.com	Surgery

Academic Coach Total: 49

Search

+ Add New

Name	Email	Department
Woodtest, Kira	kira.woodtest@medsis3c.com	Surgery

Academic Coach Total: 49

Search

+ Add New

Name	Program	Training Level	Campus	Start Date	End Date
Cadest, Ryan	General Surgery	PGY1			
Woodtest, Kira	Internal Medicine	PGY4			

Bulk Assignment

Effective Date:

Expiry Date:

Role: Learner

Users:

SELECT ALL DESELECT ALL

Save Cancel

Already assigned learners

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

a) Add a coach

b) Assign a learner to a coach

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

[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		<input checked="" type="checkbox"/>	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		<input checked="" type="checkbox"/>	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		<input checked="" type="checkbox"/>	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		<input checked="" type="checkbox"/>	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		<input checked="" type="checkbox"/>	23-Jul-2024
6	Primary Reviewer Report	Competency Committee	Primary Reviewer Report (U of C).docx	Primary Reviewer Report (U of C)-filled.docx		<input checked="" type="checkbox"/>	23-Jul-2024
7	Secondary Reviewer Report	Competency Committee	Secondary Reviewer Report (U of C).docx			<input checked="" type="checkbox"/>	24-Jul-2024
8	Competence Committee Feedback to Resident	Competency Committee	Competence Committee Feedback to Resident (U of C).docx			<input type="checkbox"/>	

Showing 1 to 8 of 8 entries
Show entries

[First](#)
[Previous](#)
1
[Next](#)
[Last](#)

Meeting Date:
Date Decision Ratified:
Overall Status:
Purpose of Meeting:
Outcome of Meeting:
Promotion:
Comments:

Great resident to work with

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

[History](#)
Last modified on 24-Jul-2024, 10:23 by Brittany Redtest.

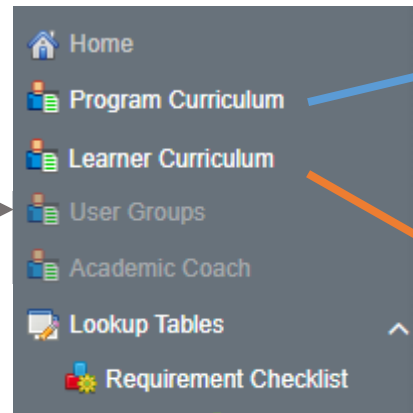
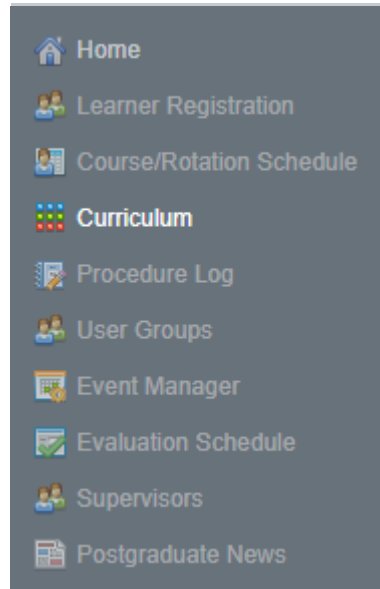
[Save](#)
[Delete](#)

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

Brittany Redtest

Home > Curriculum > Lookup Tables > Requirement Checklist

Home

Program Curriculum

Learner Curriculum

User Groups

Academic Coach

Lookup Tables

Requirement Checklist

1

Requirement

Review Period

Requirement

Search:

Name	Program	Status
Academic Advisor/Coach Report	Emergency Medicine	Active
Competence Committee Feedback to Resident	Emergency Medicine	Active
Primary Reviewer Report	Emergency Medicine	Active
QI Project Supervisor Update	Emergency Medicine	Active
Resident Self Reflection	Emergency Medicine	Active
Scholarly Project Supervisor Update	Emergency Medicine	Active
Secondary Reviewer Report	Emergency Medicine	Active
Supplementary Information from Program Administrator	Emergency Medicine	Active

Total: 9

+ Add New

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

Requirement

Review Period

2

Review Period

Search:

Name	Start Date	End Date
December 1st 2024	01-Jul-2024	30-Nov-2024
June 1st 2025	01-Apr-2025	01-Jun-2025
March 1st 2025	01-Dec-2024	28-Feb-2025

Showing 1 to 3 of 3 entries

Show

25

entries



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

Hannah Hilltest Home > Curriculum > Lookup Tables > Requirement Checklist

1 Requirement Review Period

Requirement Total: 8

Search:

2 + Add New

Name	Program	Status
Academic Advisor/Coach Report	General Surgery	✓ Active
Competence Committee Feedback to Resident	General Surgery	✓ Active
Primary Reviewer Report	General Surgery	✓ Active
QI Project Supervisor Update	General Surgery	✓ Active
Resident Self Reflection	General Surgery	✓ Active
Scholarly Project Supervisor Update	General Surgery	✓ Active
Secondary Reviewer Report	General Surgery	✓ Active
Supplementary Information from Program Administrator	General Surgery	✓ Active

- 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

Add Requirement

Name*:

Program*: --Select--

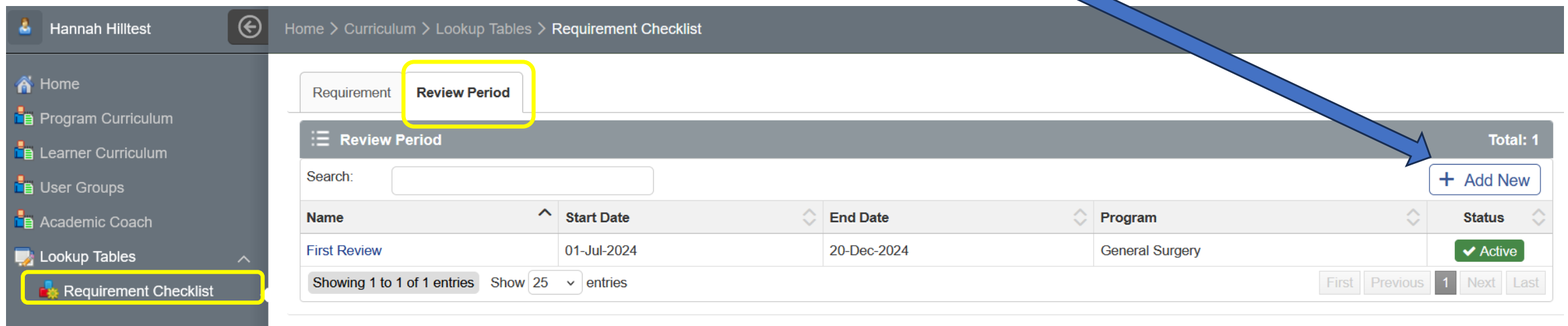
3 Active

Save Cancel

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



The screenshot shows the 'Requirement Checklist' interface. The left sidebar has a yellow box around 'Requirement Checklist'. The top navigation bar shows 'Home > Curriculum > Lookup Tables > Requirement Checklist'. The 'Review Period' tab is selected and highlighted with a yellow box. Below the tab is a search bar and a table with one entry: 'First Review' from '01-Jul-2024' to '20-Dec-2024' for 'General Surgery', with a status of 'Active'. A blue arrow points from the '+ Add New' button in the top right of the table area to the text 'Click + Add New' in the list above.

Name	Start Date	End Date	Program	Status
First Review	01-Jul-2024	20-Dec-2024	General Surgery	Active



Step 2 - Creating a CC Review Period

Hannah Hilltest

Home > Curriculum > Lookup Tables > Requirement Checklist

Requirement **Review Period**

Edit Review Period

1 Name*: Jul - Dec, 2024 Active

2 Start Date*: 01-Jul-2024

3 End Date*: 20-Dec-2024

4 Program*: General Surgery

Save Delete Cancel

- 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

The screenshot shows the MedSIS Training interface. At the top, a user profile for Hannah Hilltest is visible. Below it, a breadcrumb trail reads: Home > Curriculum > Program Curriculum > Edit Program. On the left, a sidebar menu contains: Home, Program Curriculum (highlighted with a yellow box and a blue circle with the number 1), Learner Curriculum, User Groups, Academic Coach, and Lookup Tables. The main content area is titled 'General Surgery' and has an 'Active' status. Below the title, it shows 'Department: Surgery' and 'Training Level Type: Resident'. There are three tabs: 'Details', 'Learning Path', and 'Requirement Checklist' (highlighted with a blue circle with the number 2). At the bottom right of the main content area, there are two buttons: '+ Add New Checklist' (highlighted with a blue circle with the number 3) and '← Back'. Below the tabs, there are two colored boxes (green and yellow) with vertical ellipsis icons.

- 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



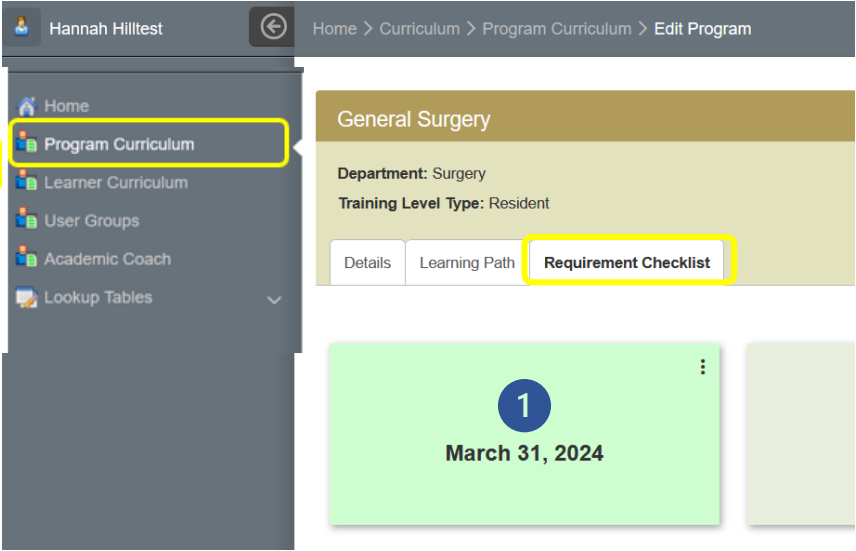
Step 3 - Adding a CC Requirement Checklist

- 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

A screenshot of a software dialog box titled "Requirement Checklist" with a red header bar. The dialog contains three numbered input fields: 1. "Name*:" with a text input field. 2. "Sequence #*:" with a text input field. 3. "Review Period*:" with a dropdown menu showing "--Select--". At the bottom right, there are two buttons: "Save" (with a floppy disk icon) and "Cancel" (with an 'X' icon). The numbers 1, 2, 3, and 4 from the list above are placed next to their respective fields and the Save button.



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

Oct 31, 2024					Total: 0
Search: <input type="text"/>					+ Add New Requirement ← Back
Sequence #	Requirement	Responsible for Requirement	File to Upload	Due Date	
					2



Step 4 : Adding Competence Committee Requirements to a CC meeting

Hannah Hilltest Home > Curriculum > Program Curriculum > Edit Program

Home
Program Curriculum
Learner Curriculum
User Groups
Academic Coach
Lookup Tables

General Surgery

Department: Surgery
Training Level Type: Resident

Details Learning Path Requirement Checklist

March 31, 2024

Search:

+ Add New Requirement

Sequence #	Requirement	Responsible for Requirement	File to Upload
------------	-------------	-----------------------------	----------------

Requirement

1 Requirement*: --Select--

Responsible for Requirement*: --Select-- 2

3 Sequence #*:

Due Date: 4

File to Upload:

Drop files or click to upload 5

6

Save Cancel

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

Hannah Hilltest

Home > Curriculum > Program Curriculum > Edit Program

Home

Program Curriculum

Learner Curriculum

User Groups

Academic Coach

Lookup Tables

General Surgery

Department: Surgery

Training Level Type: Resident

Details Learning Path Requirement Checklist

March 31, 2024

Assign Edit Delete

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

Requirement Checklist

Training Level: --Select--

Current Stage: --Select--

Learners*

Search

CLEAR

3

Bennett, Alana
General Surgery 2020
PGY2

Bennett, Bryson
General Surgery 2020
PGY3

Bennett, Charles
General Surgery 2020
PGY2

Bennett, Daisy
General Surgery 2020
PGY2

4

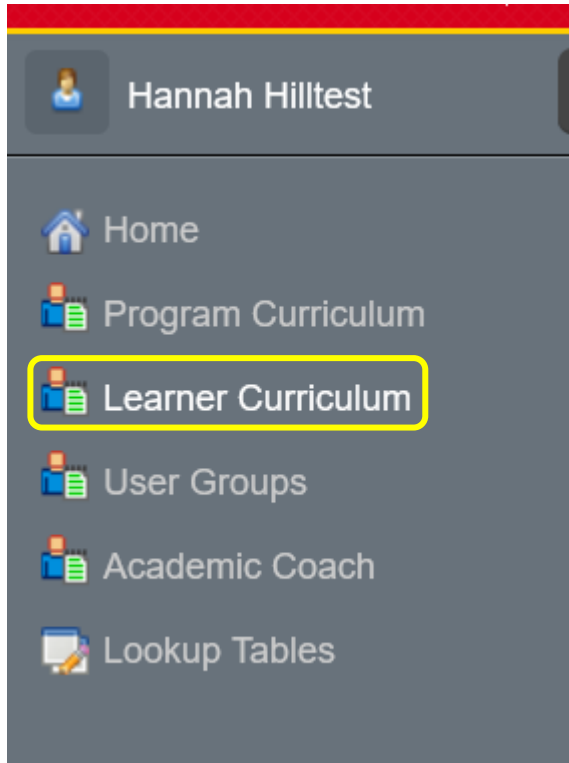
Assign Cancel

- 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

Curriculum > Learner Curriculum > Learner Dashboard

Review Dashboard tab

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		<input checked="" type="checkbox"/>	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		<input checked="" type="checkbox"/>	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		<input checked="" type="checkbox"/>	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		<input checked="" type="checkbox"/>	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		<input checked="" type="checkbox"/>	23-Jul-2024
6	Primary Reviewer Report	Competency Committee	Primary Reviewer Report (U of C).docx	Primary Reviewer Report (U of C)-filled.docx		<input checked="" type="checkbox"/>	23-Jul-2024
7	Secondary Reviewer Report	Competency Committee	Secondary Reviewer Report (U of C).docx			<input checked="" type="checkbox"/>	24-Jul-2024
8	Competence Committee Feedback to Resident	Competency Committee	Competence Committee Feedback to Resident (U of C).docx			<input type="checkbox"/>	

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

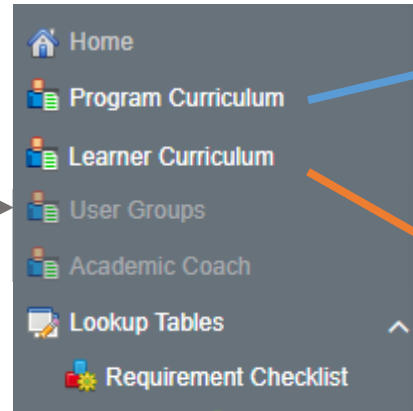
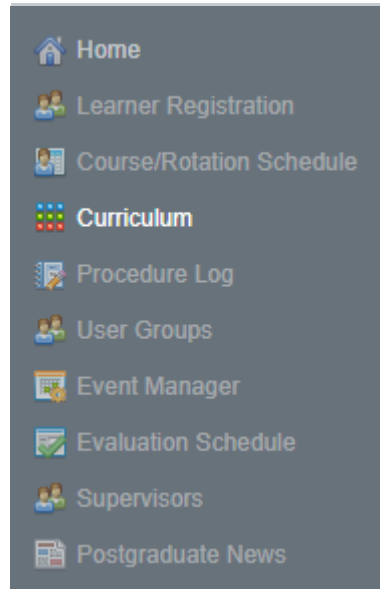


WARNING!!!!!!

- 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)

P3 TICE – 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: <input type="text"/>							+ 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			<input type="checkbox"/>	

PRACTICE - Set your meeting up from scratch

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

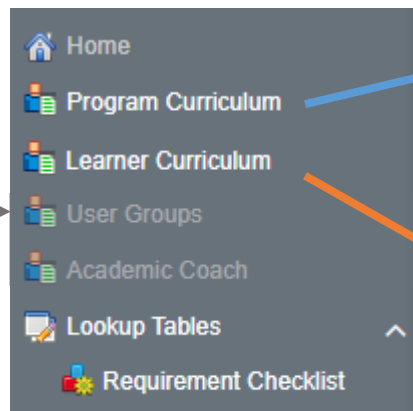
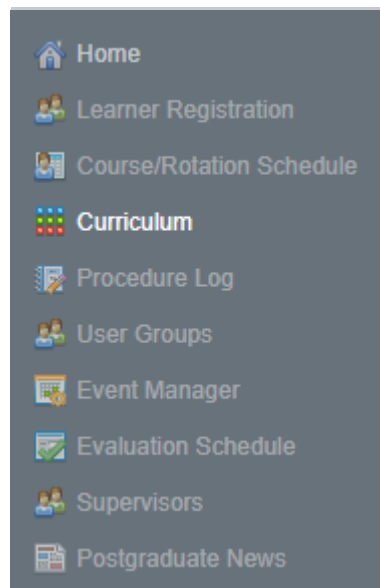
Steps 1 & 2 Home > Curriculum > Lookup Tables > Requirement Checklist

- **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

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)

PRACTICE



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

Hannah Hilltest Home > Curriculum > Lookup Tables > Requirement Checklist

1 Requirement Review Period

Requirement Total: 8

Search:

2 + Add New

Name	Program	Status
Academic Advisor/Coach Report	General Surgery	✓ Active
Competence Committee Feedback to Resident	General Surgery	✓ Active
Primary Reviewer Report	General Surgery	✓ Active
QI Project Supervisor Update	General Surgery	✓ Active
Resident Self Reflection	General Surgery	✓ Active
Scholarly Project Supervisor Update	General Surgery	✓ Active
Secondary Reviewer Report	General Surgery	✓ Active
Supplementary Information from Program Administrator	General Surgery	✓ Active

- 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

Add Requirement

Name*:

Program*: --Select--

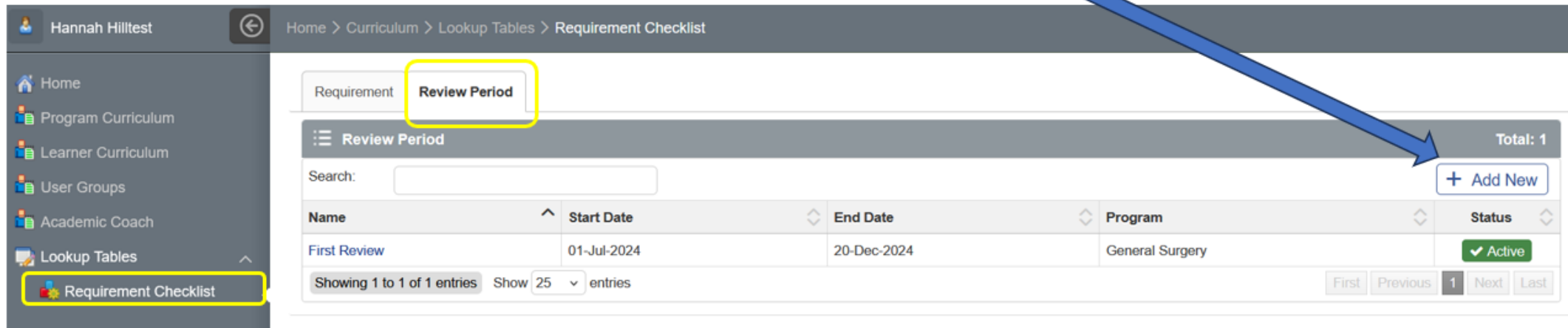
3

Active ☐

Save Cancel

DEMO: Step 2 – Creating a CC Review Period

- Click **+ Add New** to create a new Review Period



Hannah Hilltest Home > Curriculum > Lookup Tables > Requirement Checklist

Requirement **Review Period**

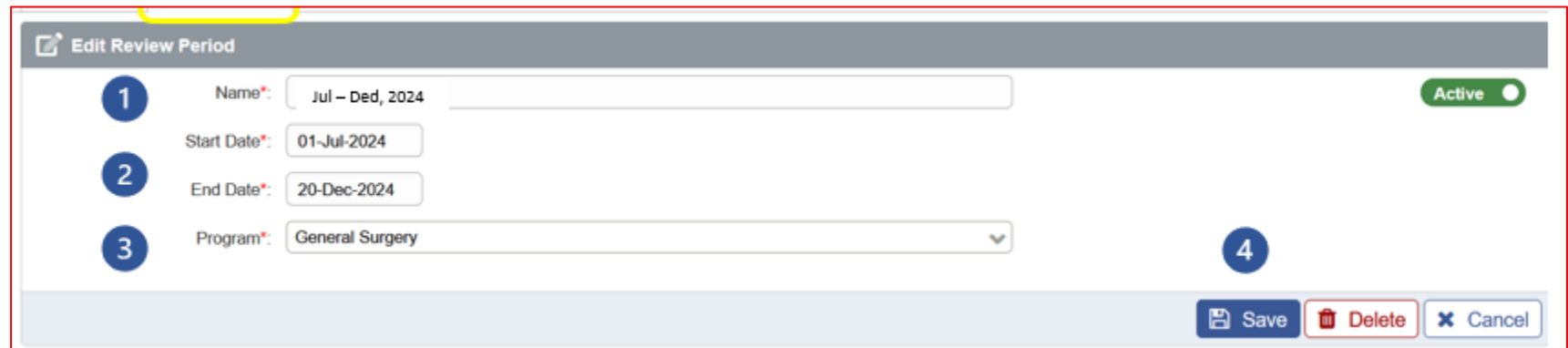
Review Period Total: 1

Search:

Name	Start Date	End Date	Program	Status
First Review	01-Jul-2024	20-Dec-2024	General Surgery	Active

Showing 1 to 1 of 1 entries Show 25 entries First Previous 1 Next Last

+ Add New



Edit Review Period

1 Name*: Jul - Dec, 2024 Active

2 Start Date*: 01-Jul-2024

3 End Date*: 20-Dec-2024

4 Program*: General Surgery

Save Delete Cancel



DEMO: Step 3 - Adding a CC Requirement Checklist

Hannah Hilltest Home > Curriculum > Program Curriculum > Edit Program

1

- Home
- Program Curriculum
- Learner Curriculum
- User Groups
- Academic Coach
- Lookup Tables

General Surgery Active

Department: Surgery
Training Level Type: Resident

Details Learning Path Requirement Checklist

2

+ Add New Checklist ← Back

Requirement Checklist

1 Name*:

2 Sequence #:

3 Review Period*: --Select--

4

Save Cancel



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

The screenshot shows the 'Edit Program' interface for 'General Surgery'. The left sidebar has 'Program Curriculum' highlighted. The main content area has tabs for 'Details', 'Learning Path', and 'Requirement Checklist'. A green tile for 'March 31, 2024' is visible. A blue arrow points from the tile to the '+ Add New Requirement' button in the bottom right corner.

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

- 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

The 'Requirement' form modal contains the following fields:

- Requirement*: --Select--
- Responsible for Requirement*: --Select--
- Sequence #*:
- Due Date:
- File to Upload: Drop files or click to upload

Buttons: Save, Cancel



DEMO: Step 5 - Select the Residents for Review

The screenshot shows the 'Program Curriculum' interface. The left sidebar has a yellow box around 'Program Curriculum'. The main area shows 'General Surgery' with 'Department: Surgery' and 'Training Level Type: Resident'. Below this are tabs for 'Details', 'Learning Path', and 'Requirement Checklist', with the last one highlighted by a yellow box. A green box labeled 'March 31, 2024' has a blue circle '1' and three dots next to it. A context menu is open with options 'Assign' (circled with a blue circle '2'), 'Edit', and 'Delete'.

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

The 'Requirement Checklist' dialog box is shown. It has fields for 'Training Level' and 'Current Stage', both set to '--Select--'. Below is a 'Learners*' section with a search bar and a 'CLEAR' button. A list of residents is shown, each with a checkbox and a blue circle '3' next to it. The residents are: Bennett, Alana (General Surgery 2020 PGY2), Bennett, Bryson (General Surgery 2020 PGY3), Bennett, Charles (General Surgery 2020 PGY2), and Bennett, Daisy (General Surgery 2020 PGY2). A blue circle '4' is next to the 'Assign' button at the bottom right.

- 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		<input checked="" type="checkbox"/>	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		<input checked="" type="checkbox"/>	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		<input checked="" type="checkbox"/>	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		<input checked="" type="checkbox"/>	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		<input checked="" type="checkbox"/>	23-Jul-2024
6	Primary Reviewer Report	Competency Committee	Primary Reviewer Report (U of C).docx	Primary Reviewer Report (U of C)-filled.docx		<input checked="" type="checkbox"/>	23-Jul-2024
7	Secondary Reviewer Report	Competency Committee	Secondary Reviewer Report (U of C).docx			<input checked="" type="checkbox"/>	24-Jul-2024
8	Competence Committee Feedback to Resident	Competency Committee	Competence Committee Feedback to Resident (U of C).docx			<input type="checkbox"/>	

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

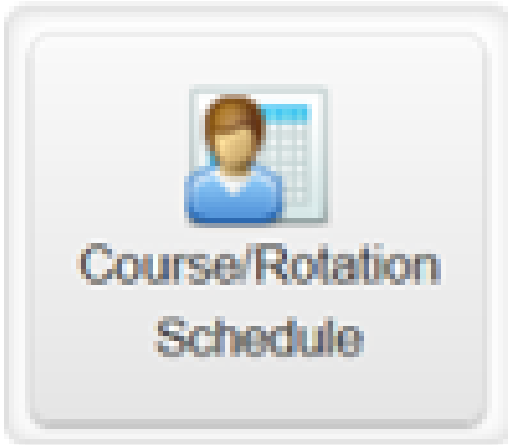
History

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

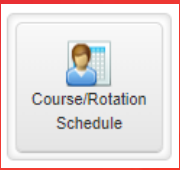
Save
Delete

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

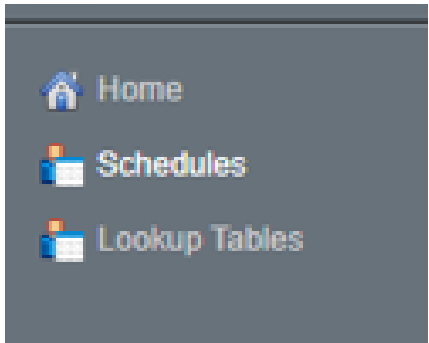
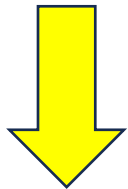
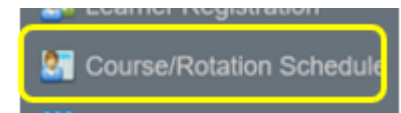
- Home
- Learner Registration
- Course/Rotation Schedule
- Curriculum
- Procedure Log
- User Groups
- Event Manager
- Evaluation Schedule
- Supervisors
- Postgraduate News



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



Home

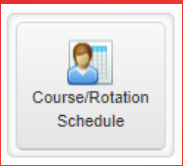


Schedules



Lookup Tables

Lookup Tables



Course/Rotation Schedule > Lookup Tables

- View the rotations that have been linked to your program

Brittany Redtest Home > Course/Rotation Schedule > Lookup Tables

Home Schedules **Lookup Tables**

Courses/Rotations

Courses/Rotations Total: 58

Search

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	ADDITION	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 > Lookup Tables

- View the rotations that have been linked to your program

Brittany Redtest Home > Course/Rotation Schedule > Lookup Tables

Home Schedules **Lookup Tables**

Courses/Rotations Total: 58

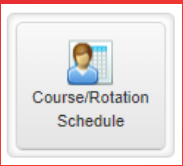
Search

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	ADDITION	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

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

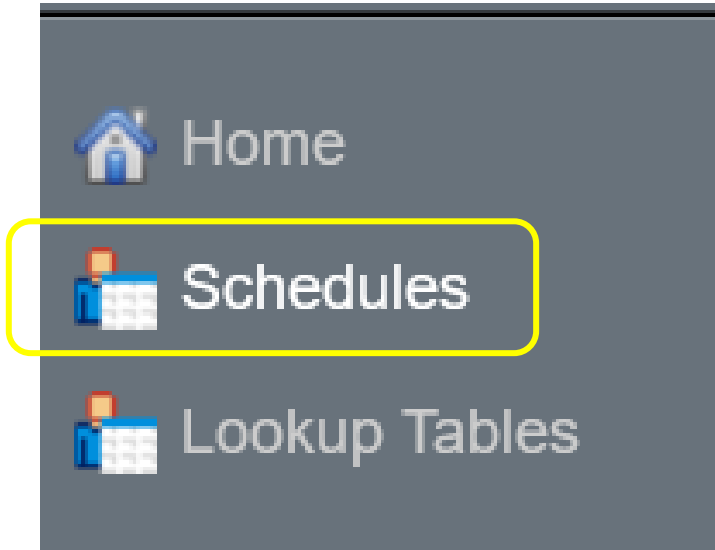
Brittany Redtest Home > Course/Rotation Schedule > Lookup Tables

Home Schedules **Lookup Tables**

Courses/Rotations Total: 58

Search

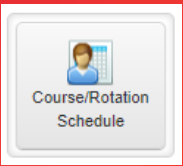
Name	Type	Code	Program	Formats	Service	Locations	External Programs	Status
ACE - Area Concentrated Expertise	Internal	EMACE	Emergency Medicine	Core, Elective				✓ Active
ACE - Area Concentrated Expertise	Internal	ACE	Emergency Medicine	Core, Elective				✓ Active
Acute Care Emergency Surgical Services 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



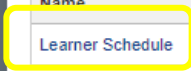
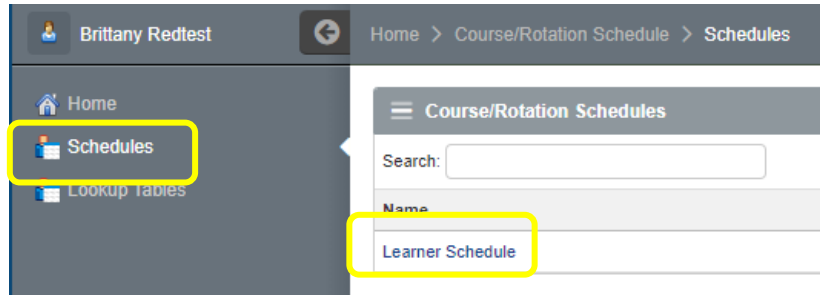
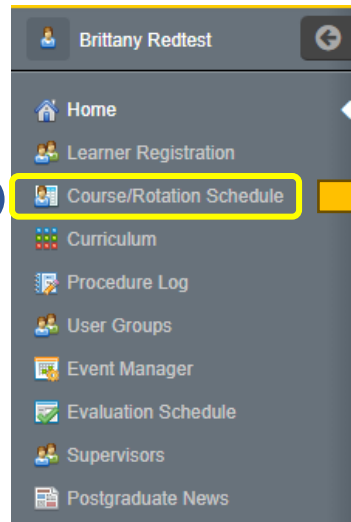
Schedules

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




		2024	
		Jul 2024	Aug 2024
Learner		Block 1	Block 2
	Cartest, Chris Emergency Medicine-PGY5	EMERGENCY	EMERGENCY
	Cautest, Ryan General Surgery-PGY1	ACCESSPLC -	ACCESSPLC -
	James, Motest Emergency Medicine-PGY2	EMRN - CALG	NEUROL - CAL
	Lintest, Ashley Emergency Medicine-PGY2	EMRN - CALGA	EMERGENCY

To view rotation schedules:

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

Course/Rotation Schedule > Schedules


Brittany Redtest

Home > Course/Rotation Schedule > Schedules

Home
Schedules
Lookup Tables

< Learner Schedule
2 incomplete courses/rotations.
Perspective: Learners - Courses/Rot...








Learners: [All](#)

Courses/ [All](#) 1

Rotations:

2024

2025

Learner	Jul 2024	Aug 2024	Sep 2024	Oct 2024	Nov 2024	Dec 2024	Jan 2025
	Block 1	Block 2	Block 3	Block 4	Block 5	Block 6	Block 7
 Bennett, Ace <u>Anesthesiology-PGY1</u>							
 Bennett, Adonis Emergency Medicine-PGY2	EMRN - CALG	EMERGENCY	PLASTFMC - C	ORTHTRAU -	RSCH13 - CAL	NEUROL - CA	EMERGENCY
 Bennett, Andrew <u>Internal Medicine-PGY3</u>							ADDICTIO
 Bennett, Atlas Emergency Medicine-PGY5	EMERGENCY	PAHOSCONJI	INTPAJR - CAI	HOMCAR - CA	ELEC13 - CAL	MEDONC - CA	INTPAJR - CA
 Bennett, Aubree Emergency Medicine-PGY4	EMERGENCY	EMERGENCY	EMERGENCY	STARS - CALC	EMERTOX - C	SRPO	EMER
 Bennett, Barrett <u>Obstetrics and Gynecology-PGY1</u>						EMERGENCY	
 Bennett, Beau Emergency Medicine-PGY1	EMERGENCY	EMERGENCY	EMERGENCY	JREM: ADDIC	PEM - CALGA	EMERGENCY	JRPOCUS - C

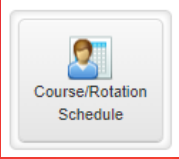
This brings you to an unfiltered view – it will contain a list of all of your residents as well as all off-service residents who are doing a rotation that is “owned” by you

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

Program Leadership (PA, PD, CC Chair)

Cumming School of Medicine – MedSIS Training

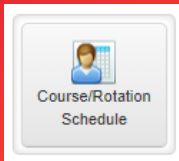
54



Seeing your home resident's schedules

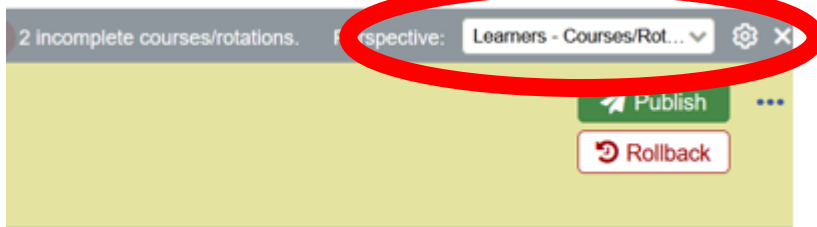
I just want to see my home resident's schedules...

How do I do that?



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

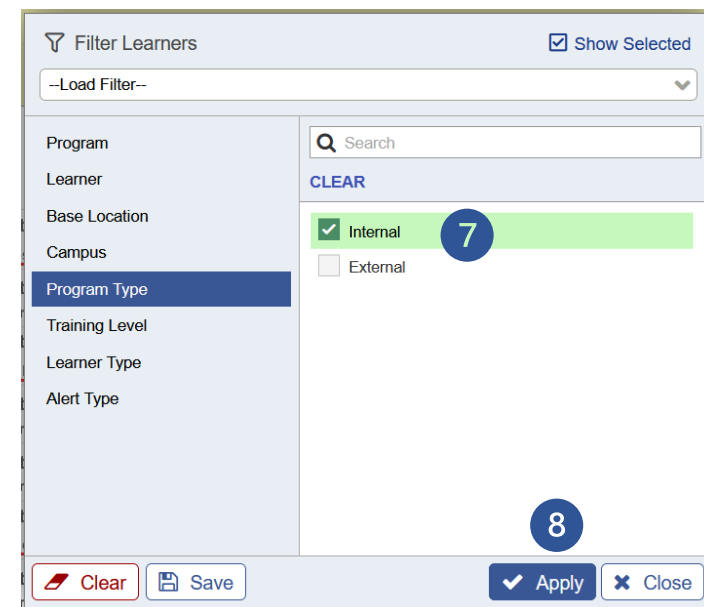
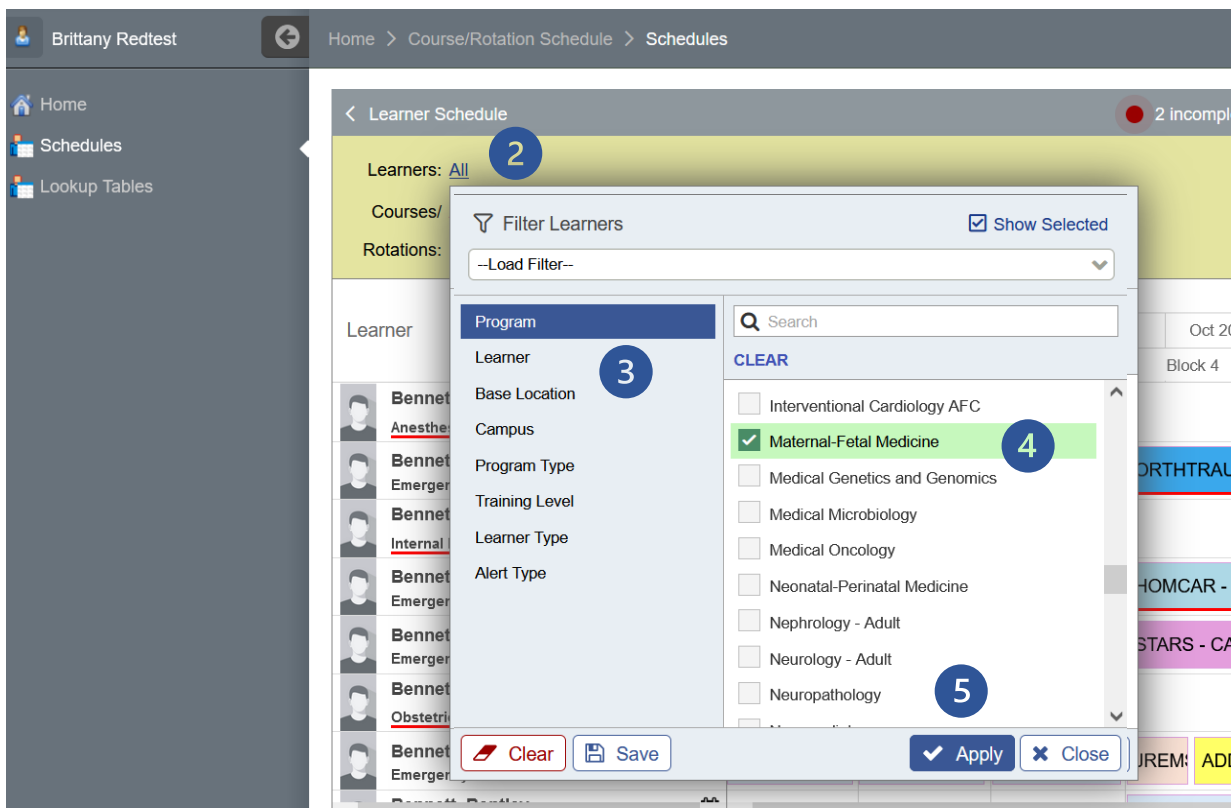
4 Select your home program

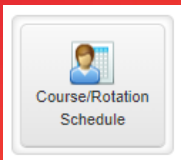
5 Select Apply

6 Click on Program Type

7 Select Internal

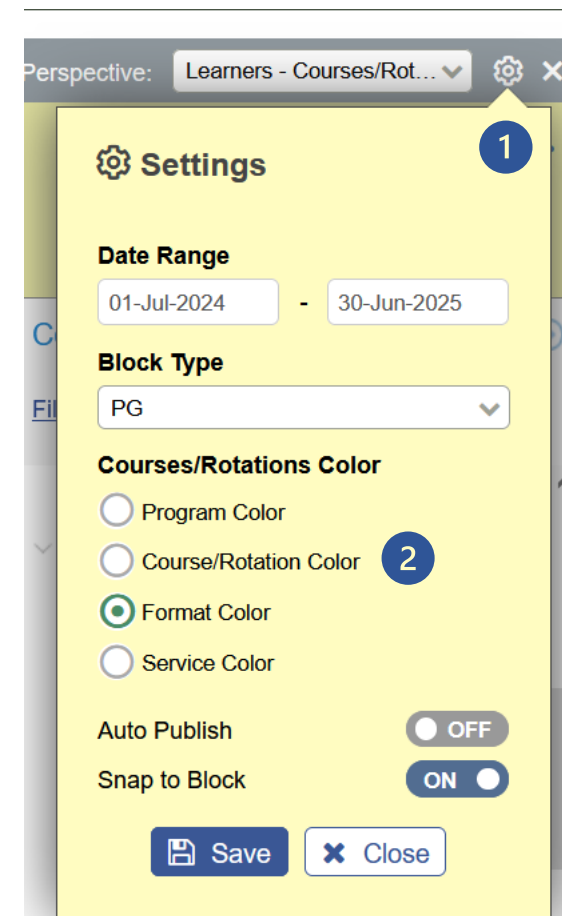
8 Apply





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

Practice

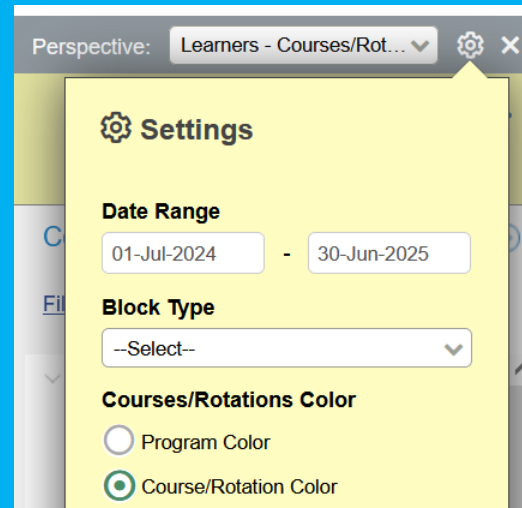
- Take a few minutes to generate a view that includes just your home program resident schedules

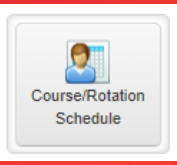
Perspective: **Learners - Courses/Rot...** ▼

Learners: Program **Maternal-Fetal Medicine** Program Type **Internal**

Courses/Rotations: [All](#)

- Now add some color!

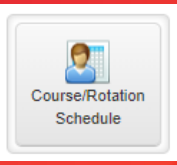




Viewing the learners coming to a rotation by block

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?



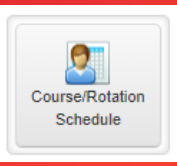
Course/Rotation Schedule > Schedules

Filtering Rotation Schedules by Rotation

The screenshot shows the 'Course/Rotation Schedule' interface. The top navigation bar includes 'Home > Course/Rotation Schedule > Schedules'. The left sidebar has 'Home', 'Schedules', and 'Lookup Tables'. The main area is titled 'Learner Schedule' and shows 'Learners: All', 'Courses/ All' (marked with a blue circle 1), and 'Rotations:'. A 'Filter Courses/Rotations' dialog box is open, showing a list of filters on the left (Program, Course/Rotation, Format, Location, Supervisor, Program Type, Course/Rotation Type, Status, Category, Incomplete Status, Alert Type, Alert Severity) and a list of rotations on the right. 'Adult Emergency Medicine [Emergency Medicine]' is selected (marked with a blue circle 3). The 'Apply' button is marked with a blue circle 4. A red circle highlights the 'Perspective: Courses/Rotations - Lea...' dropdown in the top right, with a red arrow pointing to it.

Toggle perspective to Courses/Rot
Clear all filters in place

- 1 Click All beside Courses
- 2 Select Course/Rotation
- 3 Select a Rotation of interest
- 4 Select Apply



Course/Rotation Schedule > Schedules

Filtering Rotation Schedules by Rotation

< Learner Schedule

11 incomplete courses/rotations.

Perspective: Courses/Rotations - Lea...

⚙️

✕

Learners: Program All Program Type All

Courses/Rotations: Course/Rotation Maternal Fetal Medicine [Maternal-F...

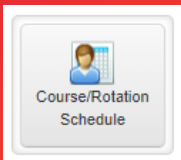
Publish

Rollback

Courses/Rotations/Locations ↑	2024							2025
	Jul 2024	Aug 2024	Sep 2024	Oct 2024	Nov 2024	Dec 2024	Jan 2025	
	Block 1	Block 2	Block 3	Block 4	Block 5	Block 6	Block 7	Block 8
Maternal Fetal Medicine [Maternal-Fetal Medicine]								
Maternal Fetal Medicine [Maternal-Fetal Medicine] Calgary	Abatest, Jenna	Aftest, Lucy	Aftest, Lucy	Ashtest, Maci	Aftest, Lucy	Abatest, Jenna	Ashtest, Maci	Aftest, L
	Ashtest, Maci	Abatest, Jenna	Ashtest, Maci		Ashtest, Maci		Abatest, Jenna	
		Ashtest, Maci			Acetest, Paul			
Maternal Fetal Medicine [Maternal-Fetal Medicine] Foothills Medical Centre								
Maternal Fetal Medicine [Maternal-Fetal Medicine] Peter Lougheed Centre								
Maternal Fetal Medicine [Maternal-Fetal Medicine]								

< < > >

Learner Grid



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

Learner Schedule

Learners: Program **1** General Surgery Program Type Internal

Courses/ [All](#)

Program General Surgery Program Type Internal

Filter Learners ☒ Show Selected

--Load Filter--

Program

Learner

Base Location

Campus

Program Type

Training Level

Learner Type

Alert Type

Search

CLEAR

☒ General Surgery

2 3

Clear Save Apply Close

DEMO – Rotation schedule: Rotation perspective

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

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

Perspective: Courses/Rotations - Lea... [Settings] [Close]

Learners: Program [All] Program Type [All]

Courses/Rotations: Course/Rotation Maternal Fetal Medicine [Maternal-F...]

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

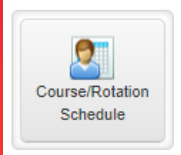
Learners: Program [All] Program Type [External]

Courses/Rotations: Course/Rotation Maternal Fetal Medicine [Maternal-F...]

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

Learners: Program [All] Program Type [External] Training Level [PGY4] [PGY5]

Courses/Rotations: Course/Rotation Maternal Fetal Medicine [Maternal-F...]



Pinning Filters

Learner Schedule 188 incomplete courses/rotations

Learners: Program **Maternal-Fetal Medicine** Program Type **Internal**

Courses/Rotations:

Filter Learners Show Selected

--Load Filter--

Program

Learner

Base Location

Campus

Program Type

Training Level

Learner Type

Alert Type

Search

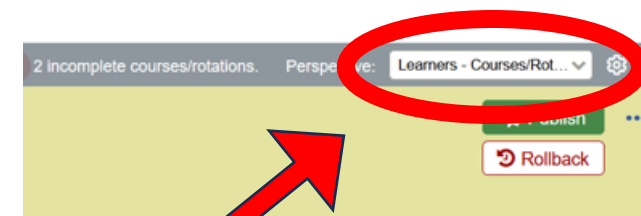
CLEAR

☒ Internal

☐ External

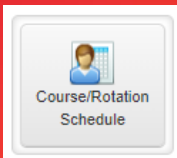
Clear Save Apply Close

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 > Schedules

Viewing rotation information – Quick View

	Mar 2025	Apr 2025	May 2025	Jun 2025
Block 9	Block 10	Block 11	Block 12	Block 13
ESSPLC -	COLOFMC - C	COLOFMC - C	IMMTU - CAL	ANESTH - CAL

Amatest, Rob

Student #: 55160

Training: **General Surgery-PGY1**

Base Hospital:

Administrative Program(s): **General Surgery**

Learner Program: General Surgery [GENSX]

Course/Rotation Program: Internal Medicine

Course/Rotation: Internal Medicine MTU [IMMTU]

Format: Core

Service: General Internal Medicine [GIME]

Location: Calgary [CALGARY]

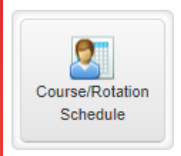
Location Categories: Not specified

Supervisors: Not specified

Published

Missing info
is in red

- 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

Course/Rotation Editor

Amatest, Rob
Student Number: 55160
Training: General Surgery-PGY1
Administrative Program(s): General Surgery
Course/Rotation: Internal Medicine MTU, Period: 05-May-2025 / 01-Jun-2025

Course/Rotation: Supervisors Calendar Alerts Evaluations Published

Learner Program*: General Surgery

Course/Rotation: Internal Medicine Course/Rotation*: [IMMTU] Internal Medicine MTU

Program*: Service: General Internal Medicine (Inter... Format: Core

Location: Location Time % Categories Primary +

Block: Block 12 Time Spent: 100 %

From*: 05-May-2025 To*: 01-Jun-2025

Expiry Date:

Course/Rotation: --Select-- Categories:

Comment:

Created on 28-Jun-2024, 08:46 by Cristian
Last published on 03-Jul-2024, 11:39 by Cristian

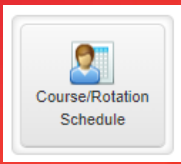
Save Delete Close

- 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

Location:

Location	Time %	Categories	Primary	+
Foothills Medical Centre	50		✓	✗
Peter Lougheed Centre	50			✗

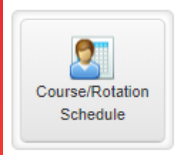
- 5 The % of time spent on this rotation can be adjusted – for example if a resident is doing a split rotation – half research, half clinics, both rotations can be present for the block with each set to 50%
- 6 Comments can be added here
- 7 Additional tabs NOT needed for MedSIS launch – more training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

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



Course/Rotation Schedule > Schedules

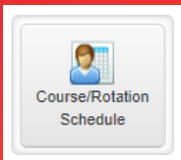
Making changes to a resident's rotation schedule

The screenshot displays the 'Courses/Rotations/Locations' interface. On the left, a sidebar shows the user 'Hannah Hilltest' and navigation options: Home, Schedules, and Lookup Tables. The main content area is titled 'Courses/Rotations/Locations' and includes a 'Filter' section with tabs for 'Learners: All', 'Courses: All', and 'Rotations'. Below this, a list of rotation categories is shown, with 'Anesthesiology' (2), 'Colorectal Surgery', 'Critical Care Medicine', 'Diagnostic and Molecular Pathology', 'Emergency Medicine', 'Gastroenterology - Adult', 'General Surgery' (3), 'General Surgical Oncology', 'Internal Medicine', 'Pediatric Surgery', 'Thoracic Surgery', and 'Vascular Surgery'. A blue arrow points from the 'General Surgery' category to a calendar view on the right. The calendar view shows a grid of rotation blocks for the year 2025, with columns for Oct 2024, Nov 2024, Dec 2024, and Jan 2025. The grid includes blocks for 'P - CAI', 'RG - C', 'SFMC', 'COLOFMC', 'TRANSP - CAI', 'PEDIURG - C', 'EMERGENCY', 'RSCH19 - CAI', 'PEDIURG - C', 'TRAUMASX -', 'ACCESSPLC', 'ICU - CALGAF', 'TRAUMASX -', 'ACCESSFMC', 'TRAUMASX -', 'GENCOLRGH', and 'TRAUMA'. A 'Publish' button and a 'Rollback' button are visible in the top right corner of the calendar view.

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)

PEDSURG - C	PEDSURG - C	ICU - CALGAF	ICU - CALGAF
EMERGENCY	TRAUMASX -	ACCESSFMC	TRAUMASX -
		TRAUMASX -	

1

- > Emergency Medicine
- Gastroenterology - Adult
- > General Surgery
 - > Acute Care Emergency Surgical Services FMC
 - > Acute Care Emergency Surgical Services PLC
 - > Administration GENSX
 - > COLORECTAL FMC
 - > COLORECTAL PLC
 - > Community Surgery Lethbridge
 - > Community Surgery Red Deer

Perspective: Learners - Courses/Rot... ⚙️ ✕

2

Settings

Date Range
01-Jul-2024 - 30-Jun-2025

Block Type
PG

Courses/Rotations Color
☐ Program Color
☐ Course/Rotation Color
☒ Format Color
☐ Service Color

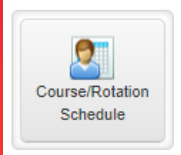
Auto Publish 4 ☐ OFF

Snap to Block 3 ☒ ON

Save ✕ Close

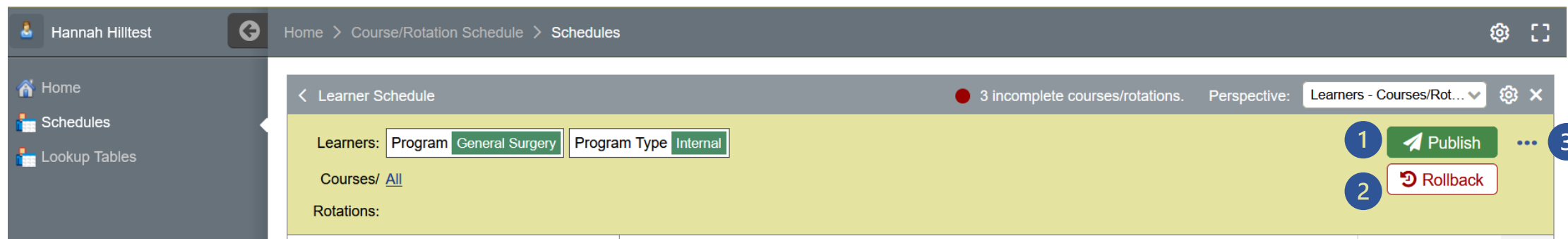
DEMO – Adding/Removing Rotations

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

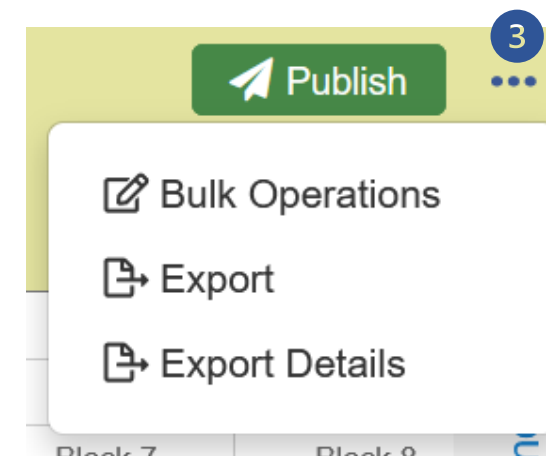


Course/Rotation Schedule > Schedules

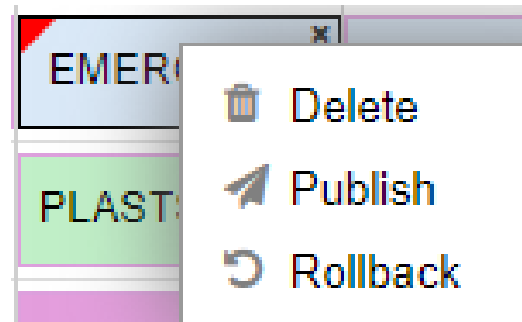
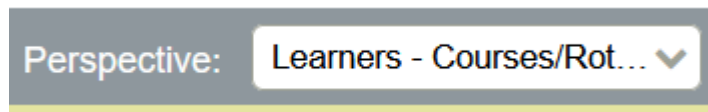
Publish and Role Back



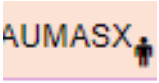
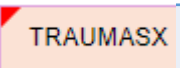

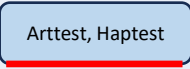
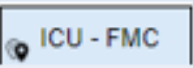


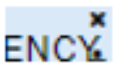
- 1 Publish – allows residents to see their schedule
- 2 Rollback is similar to “undo” – it brings you back to your most recent published version (cannot be undone – ie there is no “redo”, so be careful!)
- 3 Select 3 dots then Export to download an excel copy of the schedule

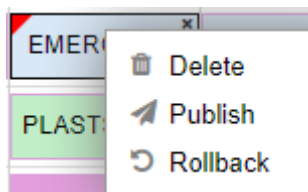


- Navigate back to your Learner Perspective
- Delete a rotation (right click)
- Drag and drop a new rotation in from the side bar



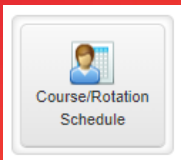
Rotation Icons

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.
	The person icon indicates that a supervisor has been added to this course/ rotation (<i>not important now, but will be next year</i>)
	A red triangle in the top left-hand corner of the course box indicates that this course/rotation is unpublished .
	A red line at the bottom of the course/rotation box shows that this rotation is an off-service rotation (external to your program)
	A red line below a resident name shows that this learner is an off-service resident (external to your program)
	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.
	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.

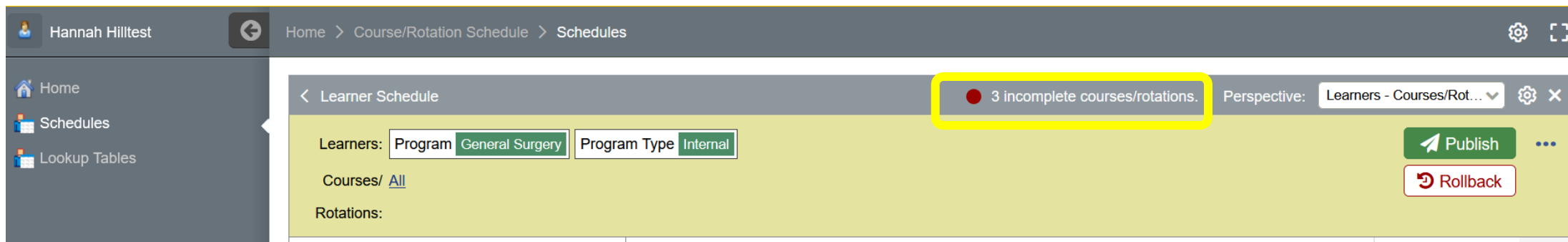


Note:

- 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



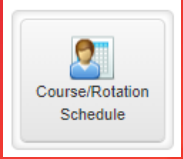
Incomplete rotation Alert



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

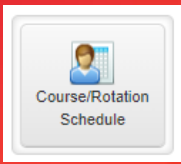
Rotations are incomplete if:

- 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

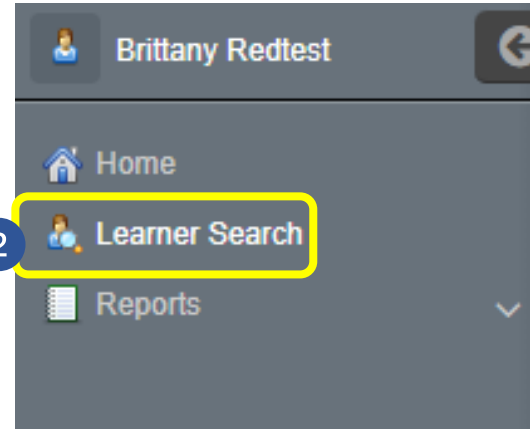
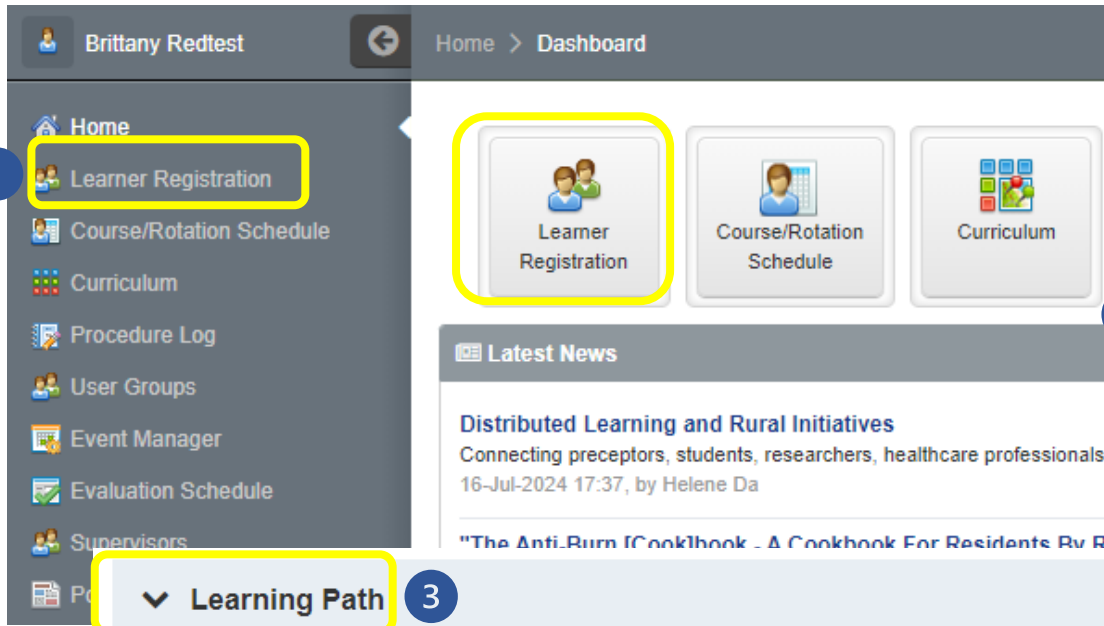


Learner Registration Module

- 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

4

Program: --Select--

Version: --Select--

Stage: --Select--

Overall Status: --Select--

Promotion: --Select--

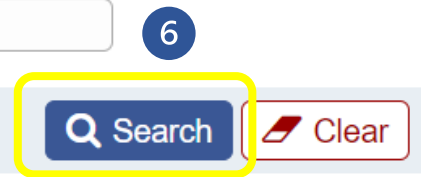
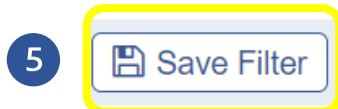
Meeting Outcome: --Select--

Learning Path Start Date: From - To

Learning Path End Date: From - To

Stage Start Date: From - To

Stage End Date: From - To





Finding your Residents in Learner Registration

Brittany Redtest Home > Learner Registration > Learner Search

Registration Info: Training Session: 2024-2025

Learner Search Result Selected: 1 Total: 19

Search:

Print Documents Export Send Email Run Task View Profile

<input type="checkbox"/>	Name	Student #	OPHRDC #	Learner Status	Default Email	Registration Status
<input type="checkbox"/>	Thiestest, Brandon	55057	55057	New Trainee	brandon.thiestest@medsis3c.com	Registered
<input checked="" type="checkbox"/>	O'Test, Andrew	55250	55250	New Trainee	andrew.oteest@medsis3c.com	Registered
<input type="checkbox"/>	Martest, Andi	54998	54998	New Trainee	andi.martest@medsis3c.com	Registered

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

Brittany Redtest Home > Learner Registration > Learner Profile > Initial View 1 out of 3

Lintest, Ashley

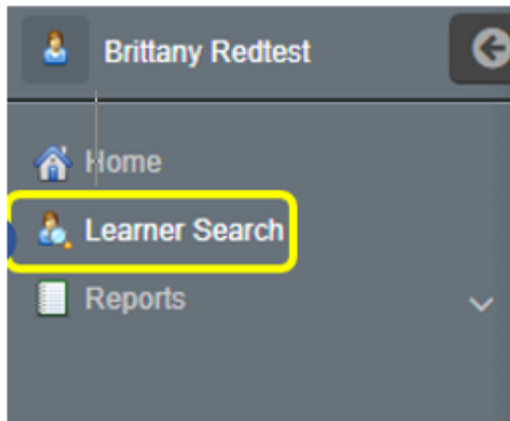
The first resident will load


Use the arrows to scroll through your residents

Explore subfolders in Learner Profile on left side bar

1 out of 3 > >>

DEMO – viewing residents in registration module









 **View Profile**

1 out of 3 > >>

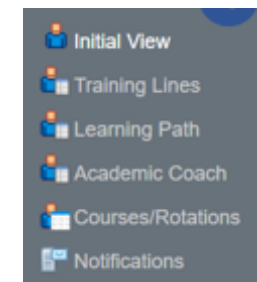
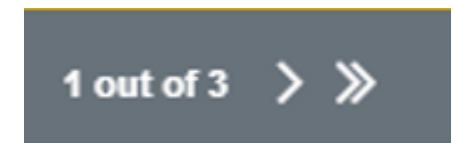
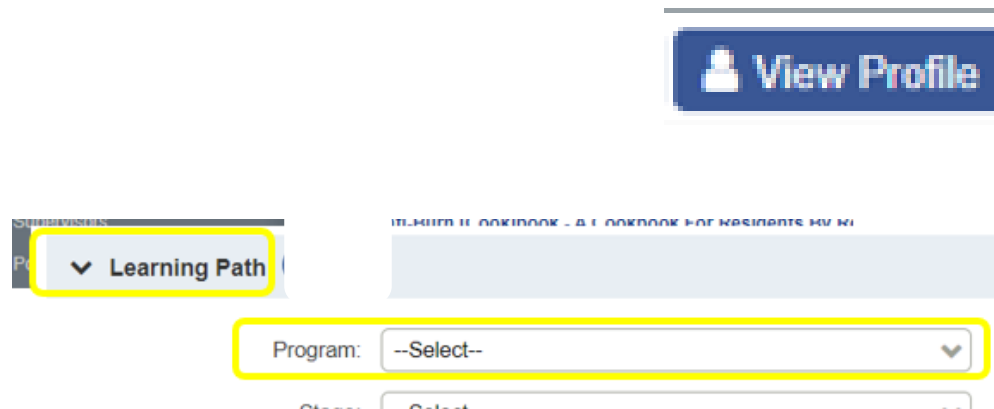
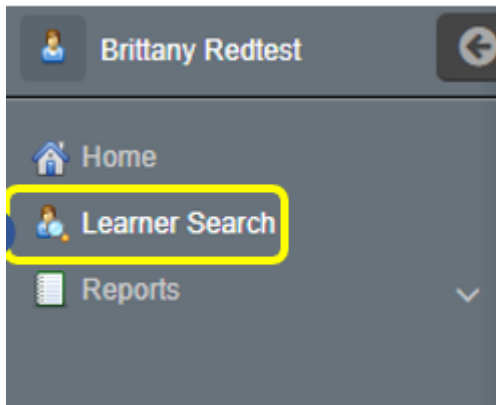
▼ **Learning Path**

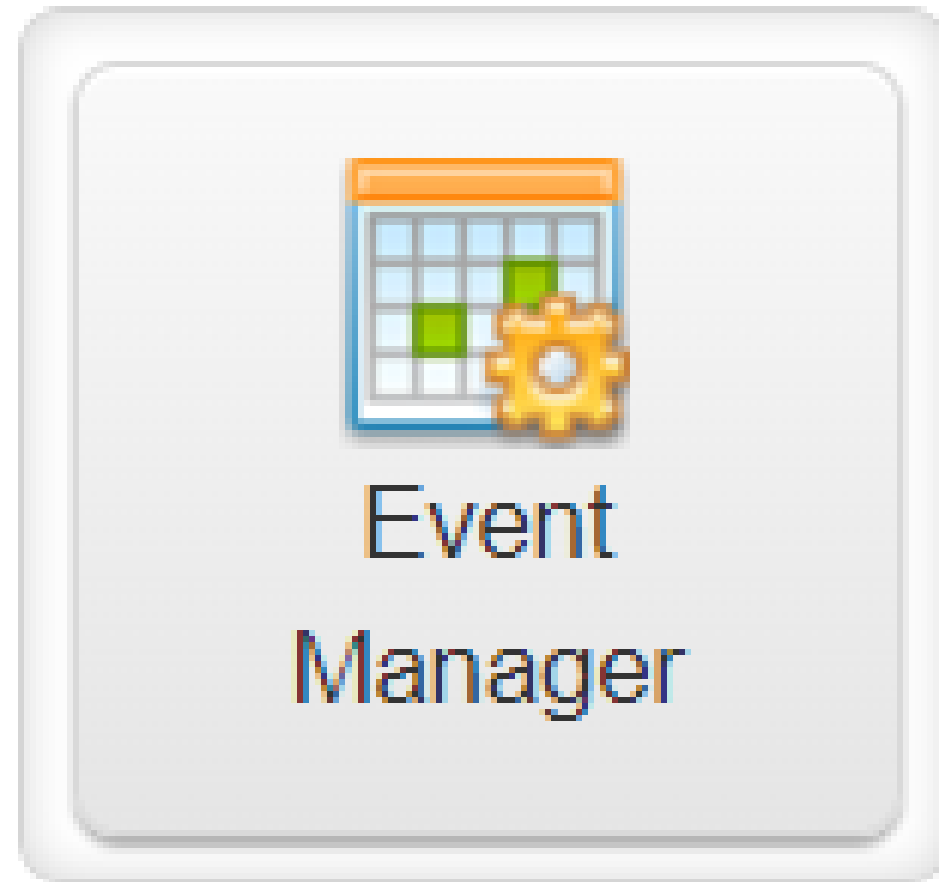
Program: --Select--

-  Initial View
-  Training Lines
-  Learning Path
-  Academic Coach
-  Courses/Rotations
-  Notifications

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





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
1	2	3	4	5	6	7
8	9	10	11 8:00 am - 9:00 an Guest Speaker ...	12	13	14
15	16	17 6:00 pm - 8:00 pm Journal Club	18	19	20	21
22	23	24	25	26 8:00 am - 9:00 an AHD - Internal ...	27	28
29	30	1	2	3 8:00 am - 9:00 an AHD - MAM	4	5
6	7	8	9	10 8:00 am - 9:00 an Workshop: tem...	11	12

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