

## How to Promote a Learner to the Next Stage

TARGET AUDIENCE: ADMINISTRATORS AND PROGRAM DIRECTORS

This guide outlines the process for promoting a learner to the next stage. The current stage does not need to be marked achieved to promote a learner to the next stage. There are different ways to do this in MedSIS:

1. [Promote your Learner from the 'Curriculum' module](#), or
2. [Promote your Learner from 'Learner Registration' module](#).

Both ways are equivalent, you can choose the one you prefer. If you are promoting multiple learners, the second option may be more efficient, as it allows you to switch between learners more easily.

### Curriculum Module

1. From the MedSIS home page, click **Curriculum**.



2. Go to **Learner Curriculum** and the side navigation menu.



3. Click on the learners' name to access their **EPA Dashboard**.

Home > Curriculum > Learner Curriculum

Learner Curriculum Total: 52

Search  Export

Learner	Training Program	Learning Path	Training Level	Current Stage	Start of Stage	Stage Progress	Overall Status
<input type="checkbox"/>			PGY2	Stage 2 - Foundations of Discipline	01-Jul-2023	0%	Progressing as expected
<input type="checkbox"/>			PGY4	Stage 3 - Core of Discipline	01-Jul-2024	8%	Progressing as expected
<input type="checkbox"/>			PGY4	Stage 3 - Core of Discipline	01-Jul-2024	22%	Progressing as expected
<input type="checkbox"/>			PGY3	Stage 2 - Foundations of Discipline	01-Jul-2024	10%	Not Progressing as Expected
<input type="checkbox"/>			PGY1	Stage 2 - Foundations of Discipline	28-Sep-2024	46%	Progressing as expected

4. Under the **details tab**, update the **Current Stage** to the stage you want to register your learner into and update the **Start of Current Stage date** to the date the learner will be starting the stage. Click **Save**.

Start Date: 01-Jul-2024  
Current Stage: Stage 1 - Transition to Discipline ← Back

Details | EPAs | Supporting Documentation | Reflection Documentation | Assessments | Program Evaluations

Start Date\*:   
End Date:   
Current Stage\*:   
Start of Current Stage\*:   
Official:  YES  NO  
Overall Status\*:

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The learner is now registered into the new stage.

**Note:** The Achieved Date of the previous stage will reflect the date that it is marked achieved. The stage status can be marked as achieved from the learner dashboard.

+ Add Learning Path

Diagnostic and Molecular Pathology - Diagnostic and Molecular Pathology 2023 (01-Jul-2023) Official Progressing as expected

Stage	Start Date	Achieved Date	Progress
Stage 1 - Transition to Discipline	01-Jul-2024	07-Aug-2024	0%
Stage 2 - Foundations of Discipline		07-Aug-2024	4%
Stage 3 - Core of Discipline // <b>CURRENT</b>	01-Jul-2024		11%
Stage 4 - Transition to Practice			0%

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**Versioning Note:** when promoting a resident to the next stage, MedSIS will automatically register the resident in the most up to date VERSION of their EPA suite. For example, if a discipline publishes a new version of their EPA suite while a resident is in the middle of Foundations, they will complete Foundations in the old version and MedSIS will load the new version of Core when they are promoted to Core.

If the resident reached ahead in the old version and completed EPA observations in the old version of Core, MedSIS will import those observations into the new version of Core as long as they are similar to the old version.

The Royal College often activates new versions on July 1<sup>st</sup>. Please take note of this when promoting residents close to this date – if a new version is launching, it is likely better to wait until after July 1 to promote them or they will be promoted into the old version of the next stage. If you have questions about versioning, please reach out to PGME for assistance.

## Learner Registration Module

1. From the MedSIS home page, click **Learner Registration**



2. Search learner by Last Name. Click **Search**.

Home > Learner Registration > Learner Search

Q Learner Search

Save Filter

Last Name:

Student #:

First Name:

Known By:

Search Clear

3. Select all your learners and click **View Profile**.

Home > Learner Registration > Learner Search

Registration Info: Training Session: 2025-2026 Approval Status: Approved Program: Anesthesiology

Learner Search Result

Search:

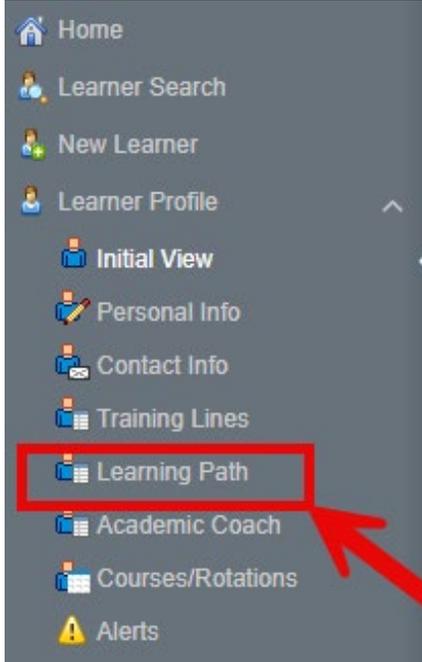
Name	Student #	Learner Status	Default Email	Registration Status	Current
<input checked="" type="checkbox"/>		New Trainee		Ready	
<input checked="" type="checkbox"/>		New Trainee		Ready	
<input checked="" type="checkbox"/>		New Trainee		Ready	
<input checked="" type="checkbox"/>		New Trainee		Ready	
<input checked="" type="checkbox"/>		New Trainee		Ready	
<input checked="" type="checkbox"/>		New Trainee		Ready	
<input checked="" type="checkbox"/>		Returning Trainee		Ready	

Selected: 7

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Program	Last Training Level	Last Training Start Date	Last Training End Date
Anesthesiology	PGY1	01-Jul-2025	30-Jun-2026
Anesthesiology	PGY1	01-Jul-2025	30-Jun-2026
Anesthesiology	PGY1	01-Jul-2025	30-Jun-2026
Anesthesiology	PGY1	01-Jul-2025	30-Jun-2026
Anesthesiology	PGY1	01-Jul-2025	30-Jun-2026
Anesthesiology	PGY1	01-Jul-2025	30-Jun-2026
Anesthesiology	PGY1	01-Jul-2025	30-Jun-2026
Anesthesiology	PGY2	01-Jul-2025	30-Jun-2026

4. From the menu on the left, select **Learning Path**.



5. Click on the **Learning Path**.

A screenshot of the 'Learning Path' page. At the top, there is a breadcrumb trail: Home > Learner Registration > Learner Profile > Learning Path. Below this is a learner profile card with a placeholder image, a '+ Add Note' button, and 'Ready' and 'New Trainee' buttons. The main content area is titled 'Learning Path' and contains a '+ Add Learning Path' button. Below that is a card for 'Diagnostic and Molecular Pathology - Diagnostic and Molecular Pathology 2023 (01-Jul-2025) Official' with a 'Progressing as expected' status. A table below shows the stages of the learning path:

Stage	Start Date	Progress
Stage 1 - Transition to Discipline // <b>CURRENT</b>	01-Jul-2025	0%
Stage 2 - Foundations of Discipline		0%
Stage 3 - Core of Discipline		0%
Stage 4 - Transition to Practice		0%

A red arrow points from the right side of the table to the title 'Diagnostic and Molecular Pathology - Diagnostic and Molecular Pathology 2023 (01-Jul-2025) Official'.

6. Under the **details tab**, update the **Current Stage** to the stage you want to register your learner into and update the **Start of Current Stage date** to the date the learner will be starting the stage. Click **Save**.



Start Date: 01-Jul-2024  
Current Stage: Stage 1 - Transition to Discipline

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Details | EPAs | Supporting Documentation | Reflection Documentation | Assessments | Program Evaluations

Start Date\*: 01-Jul-2024  
End Date:   
Current Stage\*: Stage 1 - Transition to Discipline  
Start of Current Stage\*: 01-Jul-2024  
Official: YES  
Overall Status\*: Progressing as expected

Save Delete

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The learner is now registered into the new stage.

**Note:** The Achieved Date of the previous stage will reflect the date that it is marked achieved. The stage status can be marked as achieved from the learner dashboard.

+ Add Learning Path

Diagnostic and Molecular Pathology - Diagnostic and Molecular Pathology 2023 (01-Jul-2023) Official Progressing as expected

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Stage 2 - Foundations of Discipline		07-Aug-2024	4%
Stage 3 - Core of Discipline // <b>CURRENT</b>	01-Jul-2024		11%
Stage 4 - Transition to Practice			0%

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7. Go to your next learner by clicking the **'next' icon** on the top right. Repeat steps **5 to 6** and go to the next one until you have promoted all your learners to the corresponding stage.

