

Program Administrator New Year Checklist

TARGET AUDIENCE: ADMINISTRATORS

This quick guide contains a checklist outlining the tasks required in MedSIS to efficiently set up the new year. Each task below has user documentation that will provide further details about that task.

- 1- [New Learner Setup](#)
- 2- [Learner Maintenance](#)
- 3- [Annual Program Tasks](#)

1. New Learner Setup

- a. Register learners into their Learning Path.
- b. Assign learners to an Academic Coach (if relevant).

User Documentation:

- a. [Register a new learner into a Learning Path](#)
- b. [How to add Academic Coaches and assign Learners](#)

2. Learner maintenance

- a. Mark EPAs and stages achieved and approved after Competence Committee and Residency Program Committee decisions have been made.
- b. Promote learners to the next appropriate stage of training after committee decisions have been made.
- c. Close the learner's learning path when they finish/leave the program.

User Documentation:

- a. [How to mark EPAs and Stages achieved and approved](#)
- b. [How to promote learners to the next Stage](#)
- c. [How to close/end the Learning Path](#)

3. Annual Program Tasks

- a. Review/update the membership of your Competence Committee
- b. Review/verify Academic Advisor assignments, onboard new faculty.

User Documentation:

- a. [How to create a Competence Committee Meeting](#)
- b. [How to view and edit your competence committee membership](#)

- c. [How to add Academic Coaches and assign Learners](#)