

Medical University Hospital Authority (MUHA)
Office of Graduate Medical Education (GME)

Standard Procedures and Practices
in the Operation of the GME Enterprise's
Electronic Residency Management System (ERMS)

Management of Resident Graduation within the ERMS

Policy

The MUHA GME Office requires all GME programs manage the ERMS accounts of trainees expected to graduate from their programs on June 30 in the fashion outlined in Appendix A, "On-Cycle Graduation Procedures" below. Trainees graduating at other times of the year must be managed in the fashion outlined in Appendix B, "Off-Cycle Graduation Procedures".

Deviations from the procedures listed in this Policy's Appendices are not permissible without prior written authorization from the Director of the GME Office.

The term "program administrator" in these procedures is meant to refer primarily to the coordinator in each program. However, in the event that a program's coordinator is unable to fully attend to these procedures, the program director must either do so himself or identify a suitable delegate.

Appendix A

On-Cycle Graduation Procedures

Program administrators must take care to attend completely, accurately, and in a timely fashion to all of the steps in the checklist below. Failure to do so will create inaccuracies in the ERMS which will hamper future ERMS use at the program and GME Office level. When creating new People Groups, program administrators must take care to name their groups exactly as shown below, including using the same spacing and the same mix of upper and lower case letters.

In attending to the various activities below, it is helpful to understand that each program has *two* People Groups relevant to residents who are graduating in the current year. A program's "Graduating Residents" group contains only the program's residents who are graduating on-cycle (i.e., on June 30). Separately, a program's "Graduates xxxx" People Group (where xxxx is the *calendar* year in question) contains all of the program's residents who graduate at any point during that calendar year.

As a reminder, People Groups are created in the ERMS using the function under Administration, Users, People Groups. Users are added to, or removed from, People Groups using the function under Administration, Users, Add People to People Groups.

It should also be noted that the word "resident" as used throughout this document applies equally to both specialty residents and sub-specialty residents (a.k.a. "fellows").

Step 1 in this set of procedures is the same as for the Off-Cycle Graduation Procedures.

1. Each year, in the month of March, the program coordinator must update the program's People Groups relating to graduating residents, as follows:
 - a. Remove from the "Graduating Residents" People Group all of the old names left there from the previous year.
 - b. Next, re-populate the "Graduating Residents" People Group with all of the residents expected to graduate on June 30. Do *not* include in the "Graduating Residents" People Group any resident who is not expected to graduate on-cycle.
 - c. Create a new People Group called "Graduates xxxx" where xxxx is the calendar year in question. For example, "Graduates 2006".
 - d. Populate the "Graduates xxxx" group all of the residents expected to graduate at any point in that calendar year. This of course will include all the residents expected to graduate on-cycle on June 30, but it may also include an occasional resident expected to graduate off-cycle at any other point during that calendar year.

This work must be completed by the close of business on March 31 (or the closest prior business day).

It is *critical* that the “Graduating Residents” People Group containing last year’s graduates *not* be renamed as the “Graduates xxxx” People Group for the prior year. (Such renaming would cause problems for the GME Office’s “All MUHA Graduating Residents” super-group.) Instead, take care each year to create a new “Graduates xxxx” People Group and populate it appropriately.

The GME Office will gather all of the programs’ “Graduates xxxx” groups for a given year into a corresponding super-group containing all of MUSC’s residents who graduated in that calendar year. These super-groups will be maintained for historical purposes. Furthermore, the “Graduates xxxx” groups at the individual program level will provide each program a convenient method of targeting specific groups of graduates for later activities such as generating address labels for ACGME-mandated surveys of graduates.

2. In the 4-5 business days between June 30 and July 7 (but starting no earlier than June 30), the following updates in the ERMS must be made for each resident who graduated as of June 30.
 - a. The resident must have his Rank updated to “Graduated/Active”. This can be accomplished either by manually updating each such resident’s Rank on the resident’s Biographic Information screen or by using the Administration, Users, Promote feature to promote the resident. The Administration, Users, Promote feature also can be used to promote the program’s entire “Graduating Residents” People Group in a single operation if the program administrator so desires as a time-saving measure. The Promote feature is a time-saving feature which (1) updates a resident’s Rank to the next appropriate rank in the program, (2) closes out the Training & Education record for the just-completed year of training, and (3) if appropriate, creates a new Training & Education record for the just-started year of training.
 - b. Unless the resident has gone on to assume some other position (e.g., advanced trainee, or faculty member) in the program, the resident must have his Status updated to Inactive. The Administration, Users, Promote feature does *not* change a promoted resident’s Status. The program administrator must go into the Biographical Information screen for each graduated resident, manually change the resident’s Status to Inactive, and then click the “Save Changes” button on that screen.
 - c. On the Administration, Users, Biographical Data, Training & Education tab for the resident, the training record for the final year of training must be updated to reflect 06/30/xxxx as the final date of training. NOTE: If the Administration, Promote feature was used to update the resident’s Rank to “Graduated/Active”, then the system automatically takes care of

closing out the training record for the final year of training and a manual update of this record is not needed.

- d. On the Administration, Users, Biographical Data, Miscellaneous tab for the resident, the program administrator must review the Program Start Date and Program End Date and update these dates as appropriate, including setting the Program End Date to 06/30/xxxx.
- e. On the Miscellaneous tab for the resident, the program administrator must enter a Residency Graduation Date of 06/30/xxxx.
- f. On the Miscellaneous tab for the resident, the program administrator must enter a brief comment as to the resident's post-training plans.
- g. Remove the resident from the program's "All Residents" People Group. A program's "All Residents" People Group must reflect at all times the entire body of residents *currently* in that program.
- h. Remove the resident from his respective "PGYx Residents" People Group. Each of a program's "PGYx Residents" People Groups must reflect at all times the entire body of residents *currently* in that PGYx class (e.g., PGY1 class, PGY2 class, etc.) in that program.
- i. If the resident was a chief resident, remove him from the program's "Chief Residents" People Group. A program's "Chief Residents" People Group must reflect at all times the entire body of chief residents *currently* in that program.

IMPORTANT: Do *not* delete any People Groups which become empty as a result of removing graduated residents (or departed chief residents) as instructed above.

3. By July 31 (or the prior business day closest to July 31), the program administrator must update the home *and* office contact information on the Administration, Users, Biographical Data, Contact Information tab for each resident who graduated as of June 30.

Appendix B

Off-Cycle Graduation Procedures

Program administrators must take care to attend completely, accurately, and in a timely fashion to all of the steps in the checklist below. Failure to do so will create inaccuracies in the ERMS which will hamper future ERMS use at the program and GME Office level. When creating new People Groups, program administrators must take care to name their groups exactly as shown below, including using the same spacing and the same mix of upper and lower case letters.

In attending to the various activities below, it is helpful to understand that each program has *two* People Groups relevant to residents who are graduating in the current year. A program's "Graduating Residents" group contains only the program's residents who are graduating on-cycle (i.e., on June 30). Separately, a program's "Graduates xxxx" People Group (where xxxx is the *calendar* year in question) contains all of the program's residents who graduate at any point during that calendar year.

As a reminder, People Groups are created in the ERMS using the function under Administration, Users, People Groups. Users are added to, or removed from, People Groups using the function under Administration, Users, Add People to People Groups.

It should also be noted that the word "resident" as used throughout this document applies equally to both specialty residents and sub-specialty residents (a.k.a. "fellows").

Step 1 in this set of procedures is the same as for the On-Cycle Graduation Procedures.

1. Each year, in the month of March, the program coordinator must update the program's People Groups relating to graduating residents, as follows:
 - a. Remove from the "Graduating Residents" People Group all of the old names left there from the previous year.
 - b. Next, re-populate the "Graduating Residents" People Group with all of the residents expected to graduate on June 30. Do *not* include in the "Graduating Residents" People Group any resident who is not expected to graduate on-cycle.
 - c. Create a new People Group called "Graduates xxxx" where xxxx is the calendar year in question. For example, "Graduates 2006".
 - d. Populate the "Graduates xxxx" group all of the residents expected to graduate at any point in that calendar year. This of course will include all the residents expected to graduate on-cycle on June 30, but it may also include an occasional resident expected to graduate off-cycle at any other point during that calendar year.

This work must be completed by the close of business on March 31 (or the closest prior business day).

It is *critical* that the “Graduating Residents” People Group containing last year’s graduates *not* be renamed as the “Graduates xxxx” People Group for the prior year. (Such renaming would cause problems for the GME Office’s “All MUHA Graduating Residents” super-group.) Instead, take care each year to create a new “Graduates xxxx” People Group and populate it appropriately.

The GME Office will gather all of the programs’ “Graduates xxxx” groups for a given year into a corresponding super-group containing all of MUSC’s residents who graduated in that calendar year. These super-groups will be maintained for historical purposes. Furthermore, the “Graduates xxxx” groups at the individual program level will provide each program a convenient method of targeting specific groups of graduates for later activities such as generating address labels for ACGME-mandated surveys of graduates.

2. Within 5 business days of the graduation of the off-cycle resident, the following updates in the ERMS must be made.
 - a. The resident must have his Rank updated to “Graduated/Active”. This can be accomplished either by manually updating each such resident’s Rank on the resident’s Administration, Users, Biographic Information screen or by using the Administration, Users, Promote feature to promote the resident. The Promote feature is a time-saving feature which (1) updates a resident’s Rank to the next appropriate rank in the program, (2) closes out the Training & Education record for the just-completed year of training, and (3) if appropriate, creates a new Training & Education record for the just-started year of training.
 - b. Unless the resident has gone on to assume some other position (e.g., advanced trainee, or faculty member) in the program, he must have his Status updated to Inactive. The Administration, Users, Promote feature does *not* change a promoted resident’s Status. The program administrator must go into the Biographical Information screen for each graduated resident, manually change the resident’s Status to Inactive, and then click the “Save Changes” button on that screen.
 - c. On the Administration, Users, Biographical Data, Training & Education tab for the resident, the training record for the final year of training must be updated to reflect the final date of training. NOTE: If the Administration, Promote feature was used to update the resident’s Rank to “Graduated/Active”, then the system automatically takes care of closing out the training record for the final year of training and a manual update of this record is not needed.
 - d. On the Administration, Users, Biographical Data, Miscellaneous tab for the resident, the program administrator must review the Program Start

Date and Program End Date and update these dates as appropriate, including setting the Program End Date to the date of graduation.

- e. On the Miscellaneous tab for the resident, the program administrator must enter the date of graduation into the Residency Graduation Date field.
- e. On the Miscellaneous tab for the resident, the program administrator must enter a brief comment as to the resident's post-training plans.
- f. Remove the resident from the program's "All Residents" People Group. A program's "All Residents" People Group must reflect at all times the entire body of residents *currently* in that program.
- g. Remove the resident from his respective "PGYx Residents" People Group. Each of a program's "PGYx Residents" People Groups must reflect at all times the entire body of residents *currently* in that PGYx class (e.g., the PGY1 class, PGY2 class, etc.) in that program.
- h. If the resident was a chief resident, remove him from the program's "Chief Residents" People Group. A program's "Chief Residents" People Group must reflect at all times the entire body of chief residents *currently* in that program.

IMPORTANT: Do *not* delete any People Groups which become empty as a result of removing graduated residents (or departed chief residents) as instructed above.

- 3. Within one month of graduation of an off-cycle resident, the program administrator must update the home *and* office contact information on the Administration, Users, Biographical Data, Contact Information tab for that resident.