

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 Matriculation within the ERMS

Policy

The MUHA GME Office requires all GME programs manage the ERMS accounts of trainees expected to matriculate into their programs on cycle (i.e., on July 1) in the fashion outlined in Appendix A, "On-Cycle Graduation Procedures" below. Trainees matriculating at other times of the year must be managed in the fashion outlined in Appendix B, "Off-Cycle Matriculation 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 Matriculation 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.

In attending to the various activities below, it is helpful to understand that each program has *two* People Groups relevant to residents who are matriculating on-cycle. A program's "Matriculating Residents" group contains *all* of the program's residents who are matriculating on-cycle (i.e., on July 1). Separately, a program's "Matriculates to be Oriented" People Group contains only those matriculating residents who are required to go through one or more components of the institution's new-resident orientation process. Residents who are beginning their first-ever GME training program at MUSC are so required, as also are residents who previously completed an MUSC GME training program but then had a hiatus (whether employed in any capacity at MUSC or not) before beginning their new program.

As a reminder, 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").

1. Each year, in the month of March, the program coordinator must update the program's People Groups relating to matriculating residents, as follows:
 - a. Remove from the "Matriculating Residents" People Group all of the old names left there from the previous year.
 - b. Next, create accounts for the matriculating residents in accordance with the GME Office's "New User Account Creation" standard operating procedure. Administrators are again reminded of the importance of ***NOT*** creating duplicate accounts for users who already have ERMS accounts. A user who already has an ERMS account should be linked into the program into which he will be matriculating rather than having a new account created in that new program.
 - c. Next, re-populate the "Matriculating Residents" People Group with all of the residents expected to matriculate on July 1. Do *not* include in the "Matriculating Residents" People Group any resident who is not expected to matriculate on-cycle.
 - d. Remove from the "Matriculates to be Oriented" People Group all of the old names left there from the previous year.

- e. Next, re-populate the “Matriculates to be Oriented” People Group with all of the residents matriculating on July 1 who, in accordance with institutional policy, must go through the new-resident orientation process at the time of matriculation.

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

2. Because most matriculates need to go through a multi-day orientation process (including computer training, which includes E*Value training) prior to July 1, and because orientees are asked by the computer trainers to login to E*Value, change their initial password, and “test drive” the system, and because orientees cannot login to E*Value until their Status in the system is changed from “Pending Activation” to “Active”, it is necessary to make this Status change **BEFORE** orientees begin computer training. Thus, matriculates will need to have their accounts activated before they officially matriculate on July 1, but other adjustments in the system for new residents need to be deferred until they have officially matriculated. The procedure is as follows.

On June 16 (or the first business day thereafter) of each year, each matriculating resident must have his ERMS account Status updated from “Pending Activation” to “Active”. (If the resident’s account was created properly in accordance with the GME Office’s “New User Account Creation” standard operating procedure, then his Rank is already properly set and does not need to be updated at the actual time of matriculation.) Updating the Status can be accomplished either manually (on the Biographical Information tab on the resident’s Administration, Users, Biographic Data screen) or by using the Administration, Users, Promote feature to promote/admit the resident into the program. Alternatively, the Administration, Users, Promote feature can be used to promote/admit the program’s entire “Matriculating 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, for users with a Status of Pending Activation, (1) updates a matriculating resident’s Status in the program from Pending Activation to Active, and (2) creates a new Training & Education record for the just-started year of training.

IMPORTANT: Do NOT Promote at this time any group of your residents other than the matriculating residents. Other groups of residents such as continuing residents and your graduating residents will be Promoted on July 1. Only matriculating residents should be Promoted on June 16 (or the first business day thereafter).

IMPORTANT: Do NOT perform the other account adjustments described below in Step 3 at the time you update the matriculates’ accounts to a Status

of Active. Instead, wait until the first week of July to make the other adjustments.

3. In the 4-5 business days between July 1 and July 7 (but starting no earlier than July 1), the following updates in the ERMS must be made for each resident who matriculated as of July 1. This work must be completed by July 7 (or the closest business day prior to July 7).
 - a. If for any reason any matriculating resident has not yet had the Status on his ERMS account updated from “Pending Activation” to “Active”, then this must be done now (and he must have a new Training & Education record established for his just-started year of training). (If the resident’s account was created properly in accordance with the GME Office’s “New User Account Creation” standard operating procedure, then his Rank is already properly set and does not need to be updated at the actual time of matriculation.) Updating the Status and the Training & Education tab can be accomplished either manually (on the Biographical Information and Training & Education tabs on the resident’s Administration, Users, Biographic Data screen) or by using the Administration, Users, Promote feature to promote/admit the resident into the program. The Administration, Users, Promote feature also can be used to promote/admit the program’s entire “Matriculating 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, for users with a Status of Pending Activation, (1) updates a matriculating resident’s Status in the program from Pending Activation to Active, and (2) creates a new Training & Education record for the just-started year of training.
 - b. Verify that all the data on the Administration, Users, Biographical Data, Training & Education tab for the resident is correct (including the FMG information at the bottom of that tab), including a training record showing the correct 07/01/xxxx date of training and the correct PGYx level. If the resident has just matriculated into his first GME training program in the U.S., be sure that the “IRP” (Initial Residency Program”) box is checked.
 - c. Although the GME Office has no such requirement, this is a good time to load an updated version of the resident’s CV into the ERMS. This is done on the Administration, Users, Biographical Data, Training & Education tab.
 - d. Review and, if necessary, update the home contact information for the resident on the Administration, Users, Biographical Data, Contact Information tab. Be sure to include the home address and at least one off-campus phone number. The office contact information may be left blank; the GME Office will fill this in later.
 - e. On the Administration, Users, Biographical Data, Miscellaneous tab for the resident, the program administrator must set the Program Start Date to 07/01/xxxx. Do NOT enter a Program End Date. Do NOT enter a Residency Graduation Date.

- f. On the Administration, Users, Biographical Data, Miscellaneous tab for the resident, review and update (if necessary) the Department, Division, Department Chairman, Program Director, USMLE (or COMLEX) Step 1, 2, and 3 scores and pass dates, license numbers and expiration dates for the South Carolina medical license, the DHEC license, and the DEA license, and any available information about the resident's spouse and children.
- g. Add the resident to 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. Add the resident to 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 is matriculating as a chief resident, add him to 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.

Appendix B

Off-Cycle Matriculation 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.

Administrators should take care to note that a program's "Matriculating Residents" People Group and "Matriculates to be Oriented" People Group are intended to be used only by residents who are matriculating on-cycle. Residents who are matriculating off-cycle are managed in a one-by-one fashion, as outlined below.

As a reminder, 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").

1. Within 5 business days of the resident's matriculation (but starting no earlier than the official date of matriculation), the following updates in the ERMS must be made.
 - a. If necessary, an account for the resident must be created in the program into which he is matriculating (or, if he already has an account in the ERMS, that account must be linked into the program into which he is matriculating). The GME Office's "New User Account Creation" standard operating procedure must be followed.
 - b. The resident must have his Status (on the Administration, Users, Biographical Data screen) set to "Active", and he must have a new training record created in the Administration, Users, Biographical Data, Training & Education tab.
 - c. Verify that all the data on the Administration, Users, Biographical Data, Training & Education tab for the resident is correct (including the FMG information at the bottom of that tab), including a training record showing the correct date of training and the correct PGYx level. If the resident has just matriculated into his first GME training program in the U.S., be sure that the "IRP" (Initial Residency Program) box is checked.
 - d. Although the GME Office has no such requirement, this is a good time to load an updated version of the resident's CV into the ERMS. This is done on the Administration, Users, Biographical Data, Training & Education tab.
 - j. Review and, if necessary, update the home contact information for the resident on the Administration, Users, Biographical Data, Contact

Information tab. Be sure to include the home address and at least one off-campus phone number. The office contact information may be left blank; the GME Office will fill this in later.

- k. On the Administration, Users, Biographical Data, Miscellaneous tab for the resident, the program administrator must set the Program Start Date to the official starting date of the resident's training (not the first day he is in the Charleston area, not the first day he shows up on campus, not the first day he comes for orientation). Do NOT enter a Program End Date. Do NOT enter a Residency Graduation Date.
- l. On the Administration, Users, Biographical Data, Miscellaneous tab for the resident, review and update (if necessary) the Department, Division, Department Chairman, Program Director, USMLE (or COMLEX) Step 1, 2, and 3 scores and pass dates, license numbers and expiration dates for the South Carolina medical license, the DHEC license, and the DEA license, and any available information about the resident's spouse and children.
- m. Add the resident to 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.
- n. Add the resident to 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.
- o. If the resident is matriculating as a chief resident, add him to 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.