

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)

Establishment of New User Accounts within the ERMS

Policy & Procedure Overview

The MUHA GME Office requires all GME programs use MUHA's selected ERMS to manage key aspects of residency training including evaluations, duty hour monitoring, and procedure privilege assignment. At their discretion, programs also may use any other features provided by the ERMS such as procedure logging, diagnosis logging, and conference scheduling and attendance tracking.

As such, the GME Office requires that, at a minimum, all educators, trainees, and program directors and coordinators have user accounts in the ERMS. At their discretion, programs may provide user accounts to other GME-associated personnel, too.

The ERMS contains highly confidential information. Accesses to the ERMS are logged and are subject to auditing at any time without users necessarily being provided prior notice. In general, ERMS access codes generated for each new user account are specific to that new authorized user, and no user is permitted to reveal his access codes to anyone else under any circumstances, period. All users should be particularly alert to "social engineering," a standard trick used by hackers in which an unsuspecting user is called by a hacker who represents himself to be a technician of some sort and who requests the user provide his access codes in order to assist the technician in solving some real or imagined problem. **A legitimate technician will NEVER ask you to reveal your access codes.**

In general, program coordinators and other authorized program administrators are the only persons who create new user accounts. A program coordinator can create a new user account by logging in to the ERMS, clicking on Administrators, Users, Biographic Data and then entering, at a minimum, the data items listed in Appendix A. A user account is not considered by the GME Office as to have been properly created unless all of the data items listed in Appendix A are filled in accurately, in complete accordance with the precise specifications listed in Appendix A. At their discretion, programs may load additional information into user accounts, but the set of data items listed in Appendix A is the minimum required to properly create a new user account.

Each Program Director is ultimately responsible for ensuring his program's compliance with this policy.

Appendix A

Data Items which Must be Entered to Properly Create a New User Account within the Electronic Residency Management System

Each MUHA GME program must establish and maintain current the following data items for all ERMS users primarily affiliated with that program. All of these data items are maintained in the various tabs of the Administration, Users, Biographical Data section of the system.

IMPORTANT: DO **NOT** create a new user account for MUSC medical students matriculating into an MUSC GME program (or MUSC residents or faculty matriculating into another MUSC GME program). Each user at MUSC should have only one account in the ERMS. If an MUSC medical student (or an MUSC resident or faculty member in another program) is matriculating into your GME program, simply **LINK** that user into your program by looking him/her up in Biographic Data (you may need to change the “Program” setting to “Institution”) and assigning him/her a Status, Rank, and Role in your program (as well as checking that all the other data items below have been correctly entered, too). DO **NOT** change such a user’s home program to your program until the day he actually begins work or study in your program.

1. Biographic Information tab: Legal First Name, Legal Middle Name, and Legal Last Name
2. Biographic Information tab: Preferred First Name, Preferred Last Name.
3. Biographic Information tab: Credentials.

In general, the user’s medical degree (e.g., M.D. or D.O.) is entered here.

4. Biographic Information tab: Password.

The Password field must be filled in in order to create a new user account.

For GME trainees newly arriving at MUSC (i.e., GME trainees who have not previously had an ERMS account while attending MUSC’s medical school), set this initial password to “resident”. At new resident orientation, the Computer Training Coordinator will coach each new resident to login to the ERMS and change his password to a private phrase known only to him.

For new ERMS users other than GME trainees newly arriving at MUSC, the Program Coordinator should establish a password known only to her and then,

when the new user arrives at MUSC, the Program Coordinator should briefly meet with the new user, coach him to login, change his password to a private phrase known only to him, and provide other brief ERMS training as appropriate.

Program administrators should be aware that, at the present time, the access code database for the ERMS is completely separate and apart from the MUSC Network Account (“MNA”) access code database. Users should be educated that changing an MNA password does not change that user’s ERMS password, and changing an ERMS password does not change that user’s MNA password. It is anticipated that the ERMS will be enhanced in the near future to permit logins by MUSC personnel using their MNA access codes, and when this enhancement is in place, all ERMS users will be notified.

5. Biographic Information tab: Status.

This is a **critically** important field. Status must be set to **Active** for ERMS users actively studying or working at MUSC, **Inactive** for *former* ERMS users (typically faculty or residents who have left MUSC), or **Pending Activation** for accounts created *prior* to the actual date on which a new ERMS user is to begin work or study at MUSC.

A user account whose status is initially set to **Pending Activation** should have that status changed by the appropriate Program Coordinator to **Active** on the day the new user begins work or study at MUSC. For events (such as July 1 matriculation) in which large numbers of accounts need to be switched from a status of **Pending Activation** to a status of **Active**, Program Coordinators may use the “Promote” feature of the ERMS to switch all such statuses in a single operation. A similar switch, from **Active** to **Inactive**, must be made by the appropriate Program Coordinator whenever an ERMS user terminates his involvement with GME at MUSC. (This most typically happens when a resident graduates or a faculty member departs.)

Failure to switch a departed user’s account from **Active** to **Inactive** will allow the user to continue to login to his ERMS account, a situation that could result in fraudulent or otherwise malevolent use of the system.

In routine circumstances, Program Coordinators should take care to switch the status of graduated and terminated residents’ ERMS accounts from **Active** to **Inactive** on the day of departure. Departing residents and faculty should be instructed that this will happen and if they need to regain access, they should contact the Program Coordinator.

If a Program Coordinator is contacted by a departed resident or faculty member requesting access be restored, the Program Coordinator should take care to establish and document the reason for such access. In most cases (e.g.,

printing out a procedure log needed for hospital credentialing), it is expected that the Program Coordinator will be able to provide the requested information without restoring the user's access. If access needs to be restored, the Program Coordinator should switch the Status from **Inactive** to **Active** for a limited time and then switch it back to **Inactive**. *Do not leave a departed user's Status set to **Active** for an indefinite period of time, as such would be a major security breach in the system.*

6. Biographic Information tab: External ID.

The external ID should be set to the user's MUSC Network Account ("MNA") user ID, if known. If the MNA ID is not known, leave this field blank. For matriculating residents, the Computer Training Coordinator will fill in this field.

7. Biographic Information tab: SSN Prefix and SSN.

All ERMS users should have United States Social Security Numbers. Set the SSN Prefix to "U" (United States), and enter the SSN in the usual xxx-yy-zzzz format (i.e., be sure to include the dashes).

CHECK THE SSN CAREFULLY. IT IS CRITICAL THAT THIS NUMBER BE ENTERED CORRECTLY.

8. Biographic Information tab: Race, Gender, Birthdate, Birth Country, Citizenship Country, Visa Status, and Visa Type.

These fields are all required by the GME Office. Accurate data entry is critical for the GME Office's ability to generate accurate demographic snapshots of the GME enterprise that are needed by hospital and institutional administration for their own high-level reporting purposes.

9. Biographic Information tab: E-Mail Address.

A valid e-mail address **MUST** be entered in this field in order to create a new ERMS user account. If the new user's e-mail address is not known at the time the new user account is being created (as commonly happens when creating new accounts for matriculating residents), the Program Coordinator should enter her own address.

The Computer Training Coordinator who establishes new e-mail and other computer accounts for matriculating residents will update the E-Mail Address field as soon as a matriculating resident's new e-mail address has been established.

10. Biographic Information tab: Rank.

It is **CRITICAL** that the Rank field be set properly for new user accounts in your program.

For users new to YOUR program (including MUSC medical students who are now matriculating into your GME program), the Rank field should be set to the rank the new user will have *on the day he begins work or study at MUSC in YOUR program*.

If the Status field for new user is set to “Pending Activation,” use of the Promote feature on the user’s first day of work will simply convert the Status field from “Pending Activation” to “Active.” The Promote feature will NOT bump up the Rank by one level if the Status is “Pending Activation”. The Promote feature will bump up the Rank by one level ONLY if the Status is “Active”.

11. Biographic Information tab: Picture Filename.

A program coordinator may upload to the ERMS any digital pictures she possesses of the users primarily affiliated with her program. Click the Browse button, navigate to the proper photo filename, select OK or Open, then click Upload. The Resize to Best Fit button may be used prior to Upload if needed.

Program coordinators should be aware that the GME Office coordinates in early July a batch transfer of digital photographs from Public Safety’s ID badge system to the ERMS. Thus, program coordinators typically will not have to upload pictures for their matriculating residents and instead will only need to upload pictures for occasionally added personnel such as new faculty or residents who begin training outside of the normal July-June academic cycle. Program coordinators may access photos from the Public Safety ID badge system via a web interface available at the following address:

<http://hcc.musc.edu/intranet/humanresources/idphoto/>

An individual photo can be accessed via this interface, saved to the program coordinator’s local computer, and then uploaded into the ERMS by entering the photo’s local filename into the Picture Filename field.

12. Role, Groups, and Specialties tab: Role.

All roles appropriate to the new user should be moved from the Available Roles box to the Current Roles box. For most trainees, the only relevant role will be Trainee. For most faculty, the only relevant role will be Clinical Educator. Program Directors likely will be accorded the roles of Program Director and Clinical Educator. For most Program Coordinators, the only relevant role will be Administrator.

13. Role, Groups, and Specialties tab: Groups.

All groups in which the new user is expected to be a member should be moved from the Available Groups box to the Current Groups box. See the GME Office Standard Operating Practice document on ERMS Group Management for more information on the ERMS groups each MUHA GME program **MUST** establish and maintain current.

14. Role, Groups, and Specialties tab: Specialties.

At present, the GME Office does *not* require programs identify each user's specialties. At the program's discretion, the Program Coordinator may move the relevant specialties from the Available Specialties box to the Current Specialties box.

15. Training and Education tab: Training and Education

The *prior* training and education for each user must be listed in the Training and Education tab.

A single Training & Education record may be entered to capture each user's undergraduate experience (for example, one record to capture all four years of medical school), but the GME Office requires that one Training & Education record be entered for *each* level of *post-graduate* training including the current level. Thus, if a senior internal medicine resident at another institution has accepted an offer of a rheumatology fellowship at MUSC, the rheumatology program coordinator should set up a new ERMS user account for the prospective fellow in which there is *one* Training & Education record capturing the prospective fellow's medical schooling, followed by *three* Training & Education records capturing the prospective fellow's internal medicine residency experience (i.e., the PGY1, PGY2, and PGY3 years), plus *one more* Training & Education record capturing the prospective fellow's anticipated first year of fellowship training (i.e., the PGY4 level).

DO NOT enter Training & Education records for training levels beyond the current, or anticipated upcoming, training level.

Program coordinators must take care to update the Training and Education tab each year for all residents promoted or graduated.

16. Training and Education tab: CV

At present, the GME Office does not require programs maintain their residents' or faculty's CVs on file in the ERMS. At a program's discretion, however, this field may be used to upload a user's CV to the ERMS.

Programs may find such central storage of trainee and faculty CVs to be helpful in responding to a variety of reporting tasks.

17. Training and Education tab: ECFMG Grad, ECFMG Cert Issue Date, ECFMG Valid Thru Date, ECFMG Cert Number, ECFMG Cert Document Upload.

The GME Office **REQUIRES** all of these fields be filled in for foreign medical graduates serving as residents at MUSC. The ECFMG certificate document to be uploaded can be in any electronic format (scanned picture, Adobe PDF, etc.).

18. Contact and Address Info tab: Home Contact Address

The GME Office **REQUIRES** the Home Address and at least one primary phone number be filled in. Program Coordinators are **REQUIRED** to fill in the **CURRENT** home address of matriculating residents so that the GME Office and other institutional offices can send them important material (such as their contracts!) they will need in preparation for matriculation. Within one week after a resident has matriculated, the Program Coordinator is responsible for updating his contact information with his local information (if different from his original contact information).

19. Contact and Address Info tab: Organization Contact Information

The GME Office will fill in these fields with the central GME Office address and other central GME Office contact information.

20. Miscellaneous Tab: Program Start and End Dates

The GME Office **REQUIRES** each Program Coordinator maintain in this field a precisely accurate Program Start Date and a precisely accurate Program End Date for each resident primarily affiliated with the Coordinator's program.

DO enter the anticipated Program Start Date for a matriculating resident.

DO NOT EVER enter a Program End Date until a resident has in fact been terminated or graduated from a program.

21. Miscellaneous Tab: Residency Graduation Date

The GME Office **REQUIRES** each Program Coordinator enter the precise date of graduation (typically June 30 of the current year, thus 06/30/20xx) in this field as soon as a resident has in fact graduated.

DO NOT EVER enter a *future* Residency Graduation Date *in anticipation* of a resident's graduation. There's an old saying: "It ain't over 'til it's over."

DO NOT EVER enter a Residency Graduation Date for a resident who has been *terminated* from a program prior to graduation.

22. Miscellaneous Tab: License Number, License Exp. Date, DEA License, DEA License Expiration Date, DHEC License, DHEC License Expiration Date

The GME Office **REQUIRES** each Program Coordinator maintain **COMPLETELY CURRENT** all six of these **EXTREMELY CRITICAL** fields in the ERMS.

It is **ILLEGAL** for a trainee to be working at MUSC without being current in all necessary licenses. The GME Office regularly monitors the licensing status of all MUHA GME trainees. Trainees found to have expired licensure data on file will be forbidden from working and will be suspended from the payroll until proof of all necessary current licensure is entered into the ERMS.

Program Coordinators will find it will behoove them to pay very close attention to maintaining the data in these fields. The ERMS can generate reports on upcoming license expiration that will help faculty and trainees keep their licenses current and help the Program Coordinators keep the license documentation current.

23. Miscellaneous Tab: Division

If the user's primary academic affiliation within MUSC is within a Division, the GME Office requires the Division field be set properly by the Program Coordinator.

24. Miscellaneous Tab: Department, Program Dept. Chairman, Program Director(s), USMLE Scores and Pass Dates

The GME Office **REQUIRES** the above fields be filled in and maintained current for all faculty and trainee users of the ERMS.

25. Miscellaneous Tab: Initial Appointment Date

The GME Office **REQUIRES** the Initial Appointment Date be set to the date on which the new user is expected to (or did) begin working or studying in the MUSC GME enterprise.

26. Miscellaneous Tab: Type of Trainee

The GME Office **REQUIRES** this field be set properly for all Active trainees.

27. Miscellaneous Tab: Place of Birth

The GME Office **REQUIRES** this field be set properly for all trainees AND faculty.

For users born outside the U.S., this field should be set to “City, Country”. Do not abbreviate city names or country names.

For users born in the U.S., this field should be set to “City, State”. Do not abbreviate city names. Use the all-capital two-letter official U.S. Postal Service abbreviation for the state.

28. Miscellaneous Tab: Salary Sources

The GME Office **REQUIRES** these fields be set to indicate the known current salary sources for each resident.

29. Miscellaneous Tab: Spouse/Partner Name, E-Mail Address, and Children Info

As a service to the MUSC Residents’ Auxiliary, the GME Office **REQUIRES** Program Coordinators fill in these fields as soon as this information can be determined. Program Coordinators are responsible for maintaining accurate, current information in these fields.

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Issue Date	Version	Comments
3/20/06	1.1	Correction in instructions (#10) for setting Rank for new users. Also clarified handling of MUSC medical students matriculating into MUSC GME programs.
3/1/06	1.0	Original version