

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 "People Groups" within the ERMS

Policy & Procedure Overview

The MUHA GME Office requires all GME programs establish and maintain within their own sections of the ERMS certain, specifically named "People Groups" in order to facilitate communication throughout the GME enterprise and to expedite the efforts of individuals responsible for large scale residency data processing (e.g., resident matriculation, promotion, graduation, license verification, and demographic reporting).

The specific list of People Groups which each program must maintain is listed in Appendix A.

Each Program Director is ultimately responsible for ensuring his program's compliance with this policy, but it is anticipated that most Program Directors will have their Program Coordinators assist them in the matter by having the Coordinators manage most of the routine People Groups maintenance issues.

Any person within a program who is accorded the Role of "Administrator" (typically both the Program Director and the Program Coordinator) should have access to the People Groups management functions within the ERMS. Any Administrator who cannot access these functions should contact the ERMS vendor or the GME Office for assistance.

Each program may establish and maintain as many additional People Groups for its own purposes as desired. The set of People Groups delineated in this document merely is the minimum set which each program is required to establish and maintain.

## Appendix A

### People Groups Which All MUHA GME Programs Must Establish and Maintain Current Within the Electronic Residency Management System

Program administrators establishing and maintaining the following People Groups must take care to name the groups precisely as shown below, paying close attention to spacing (one space between each pair of words in a group name), spelling, and capitalization. In order to ensure a program's various groups are properly consolidated into the corresponding various enterprise-scale groups maintained by the GME Office, there must be uniformity in group naming across all programs. For example, the "PGY1 Residents" group must be named "PGY1 Residents" across all programs, not "PGY1 Residents" in one program, "PGY1 residents" in another program, "Residents – PGY1" in another program, and "Interns" in another program.

Some programs may have already established People Groups which are functional equivalents of some of the groups defined below but which are named differently than shown below. The easiest way to resolve this discrepancy is to rename the existing groups to match the required names shown below.

People Groups may be established or renamed or deleted by logging in to the ERMS and selecting the Administration, Users, People Groups option. Individuals may be added to, or removed from, specific People Groups by selecting the Administration, Users, Assign Users To Groups option.

You also may create "group sets," intended to contain not specific individuals but rather specific People Groups, by selecting the Administration, Users, Group Set Groups option. Specific People Groups may be added to, or removed from, group sets by selectin the Administration, Users, Assign Groups to Group Sets option.

All MUHA GME programs must establish and maintain current the following People Groups or Group Sets:

1. People Group Name: "Program Directors" (Please take care to name this group in the plural form, "Program Directors", even if the program has only one Program Director.)

Group Members: All individuals within the program who serve in the role of Program Director, Assistant/Associate/Adjunct Program Director, Site Director, or Assistant/Associate/Adjunct Site Director. It is expected that for the typical program, this group will contain only one member.

Expected use of group: The “Program Directors” group within each program will be consolidated at the GME Office level into an enterprise-scale “All MUHA Program Directors” group which can be used by enterprise-level staff to communicate (typically by using the ERMS’s group e-mail function) important policy and procedure matters to all GME program directors in the institution.

2. People Group Name: “Program Coordinators” (Please take care to name this group in the plural form, “Program Coordinators”, even if the program has only one Program Coordinator.)

Group Members: All individuals within the program who serve in the role of Program Coordinator, Assistant/Associate/Adjunct Program Coordinator, Site Coordinator, or Assistant/Associate/Adjunct Site Coordinator. It is expected that for the typical program, this group will contain only one member.

Expected use of group: The “Program Coordinators” group within each program will be consolidated at the GME Office level into an enterprise-scale “All MUHA Program Coordinators” group which can be used by enterprise-level staff to communicate (typically by using the ERMS’s group e-mail function) important policy and procedure matters to all GME program coordinators in the institution.

3. People Group Name: “Department Chairman”

Group Member: That individual who chairs the department (*not* the division) within which the program is organizationally contained.

Expected use of group: The “Department Chairman” group within each program will be consolidated at the GME Office level into an enterprise-scale “All MUHA Department Chairmen” group which can be used by enterprise-level staff to communicate (typically by using the ERMS’s group e-mail function) important policy and procedure matters to the chairs of all departments in the institution that are engaged in GME activities.

4. People Group Name: “Division Director”

Group Member: That individual who heads the division (*not* the department) within which the program is organizationally contained. This group should be omitted if the program is contained only within a department and not also within a division.

Expected use of group: The “Division Director” group within each program will be consolidated at the GME Office level into an enterprise-scale “All MUHA Division Directors” group which can be used by enterprise-level staff to communicate (typically by using the ERMS’s group e-mail function)

important policy and procedure matters to the directors of all divisions in the institution that are engaged in GME activities.

5. People Group Name: “PGYx Residents” (where x is 1, 2, 3, etc. as appropriate for the program). It is expected that the typical residency program will need to establish and maintain multiple “PGYx Residents” groups, one for each PGY level of trainees in that program. Specialty programs such as Internal Medicine likely will have Residents groups beginning with PGY1. Subspecialty programs such as Hematology/Oncology likely will have Residents groups beginning with a higher PGY level, such as PGY4. (Please take care to name this group in the plural form, “PGYx Residents”, even if the program has only one resident at the PGYx level.)

**Important:** Note that all residents will be described by their “PGY” level. The “F” designation for fellows will not be used to designate trainee rank or trainee groups.)

Group Members: Those residents currently at a PGYx level within the program.

Update Timing: Each of a program’s “PGYx Residents” group must be properly updated on July 1 each year.

Expected use of group: The “PGYx Residents” group within each program will be consolidated at the GME Office level into an enterprise-scale “All MUHA PGYx Residents” group which can be used by enterprise-level staff to communicate (typically by using the ERMS’s group e-mail function) important policy and procedure matters to the institution’s residents at the PGYx level of training.

6. People Group Name: “Chief Residents” (Please take care to name this group in the plural form, “Chief Residents”, even if the program has only one Chief Resident.)

Group Members: That individual, or those individuals, within the program currently serving the role of Chief Resident (or Associate/Assistant/Adjunct Chief Resident) or equivalent. (Sometimes this role is also called the Administrative Resident or Senior Administrative Resident.) If a program does not designate a Chief Resident or equivalent, the program should not create this group.

Update Timing: The “Chief Residents” group must be properly updated on July 1 each year.

Expected use of group: The “Chief Residents” group within each program will be consolidated at the GME Office level into an enterprise-scale “All MUHA

Chief Residents” group which can be used by enterprise-level staff to communicate (typically by using the ERMS’s group e-mail function) important policy and procedure matters to all of the institution’s chief residents.

7. People Group Name: “All Residents” (Please take care to name this group in the plural form, “All Residents”, even if the program has only one resident.)

Group Members: All of the program’s residents (including chief residents).

Expected use of group: The “All Residents” group within each program will be consolidated at the GME Office level into an enterprise-scale “All MUHA Residents” group which can be used by enterprise-level staff to communicate (typically by using the ERMS’s group e-mail function) important policy and procedure matters to all of the institution’s residents.

8. People Group Name: “Matriculating Residents” (Please take care to name this group in the plural form, “Matriculating Residents”, even if the program will be matriculating only one resident.)

Group Members: Those individuals expected to matriculate into the program (at any PGY level) in the *coming* academic year.

Update Timing: It is expected that the “Matriculating Residents” group will be updated by a program as soon as it has determined who its matriculating residents for the coming academic year will be. At the latest, the “Matriculating Residents” group must be completely, accurately populated by the close of business on March 31 of each year (or the prior business day if March 31 is a weekend or holiday). Obviously, new user accounts for the matriculating residents will need to be created first in the ERMS before the “Matriculating Residents” group is updated. Leave the “Matriculating Residents” populated as it is until the matriculating residents for the *next* year become known, at which time the prior members of the group can be removed and the new members can be added.

Expected use of group: The “Matriculating Residents” group within each program will be consolidated at the GME Office level into an enterprise-scale “All MUHA Matriculating Residents” group which can be used by enterprise-level staff to prepare for matriculation including setting up computer accounts and communicating important policy and procedure matters to all of the institution’s matriculating residents.

9. People Group Name: “Matriculates to be Oriented” (Please take care to name this group in the plural form, “Matriculates to be Oriented”, even if the program will be sending only one matriculate to orientation.)

Group Members: Those individuals matriculating into the program (at any PGY level) in the *coming* academic year who must go through any or all portions of the GME enterprise's orientation process. In general, this includes any individual who is matriculating into an MUSC GME program (any MUSC GME program) for the very first time. It also includes individuals who previously were in an MUSC GME program, then left MUSC, and are now returning to start another MUSC GME program. Individuals who currently are in an MUSC GME program and will be transitioning/matriculating into another MUSC GME program in the coming academic year should *not* be in this group. Also, individuals who previously completed an MUSC GME program but continued other employment at MUSC and now are entering another MUSC GME program should *not* be in this group.

Update Timing: It is expected that the "Matriculates to be Oriented" group will be updated by a program as soon as it has determined who its matriculating residents for the coming academic year will be. At the latest, the "Matriculates to be Oriented" group must be completely, accurately populated by the close of business on March 31 of each year (or the prior business day if March 31 is a weekend or holiday). Obviously, the "Matriculating Residents" group will need to be completed before the "Matriculates to be Oriented" group can be completed. Leave the "Matriculates to be Oriented" populated as it is until the matriculating residents who need to be oriented for the *next* year become known, at which time the prior members of the group can be removed and the new members can be added.

Expected use of group: The "Matriculates to be Oriented" group within each program will be consolidated at the GME Office level into an enterprise-scale "All MUHA Matriculates to be Oriented" group which can be used by enterprise-level staff to prepare for matriculation including setting up computer accounts and communicating important policy and procedure matters to all of the institution's matriculating residents.

10. People Group Name: "Graduating Residents" (Please take care to name this group in the plural form, "Graduating Residents", even if the program will be graduating only one resident.)

Group Members: Those individuals expected to graduate from the program (at any PGY level) in the *current* academic year.

Update Timing: Currently the GME Office **REQUIRES** that the "Graduating Residents" group be populated by March 31 of each year (or the prior business day if March 31 is a weekend or holiday) with the residents *expected* to graduate as of June 30. This timing is subject to revision in the future

should there develop a GME Office need to identify graduating residents earlier in the academic year.

**IMPORTANT:** Just because a resident is *expected* to graduate doesn't mean he indeed has graduated. Do NOT fill in a trainee's Residency Graduation Date until he in fact has graduated. If a resident who is listed in the "Graduates xxxx" group subsequently fails to graduate, he must be removed from the "Graduates xxxx" group when he leaves the program.

Expected use of group: The "Graduating Residents" group within each program will be consolidated at the GME Office level into an enterprise-scale "All MUHA Graduating Residents" group which can be used by enterprise-level staff to prepare for graduation including ordering training completing certificates, closing out payroll matters, and communicating important policy and procedure matters to all of the institution's graduating residents.

11. People Group Name: "Graduates xxxx" where xxxx is the calendar (not academic) year in question. For example, "Graduates 2006" would contain all of the residents graduating (on-cycle and off-cycle) in calendar year 2006. (Please take care to name this group in the plural form, "Graduates xxxx", even if the program will be graduating only one resident.)

Group Members: Those individuals expected to graduate from the program (at any PGY level) in the specified calendar year.

Update Timing: Currently the GME Office **REQUIRES** that the "Graduates xxxx" group be populated by March 31 of the specified year (or the prior business day if March 31 is a weekend or holiday) with the residents *expected* to graduate that year. This timing is subject to revision in the future should there develop a GME Office need to identify graduating residents earlier in the academic year.

**IMPORTANT:** Just because a resident is *expected* to graduate doesn't mean he indeed has graduated. Do NOT fill in a trainee's Residency Graduation Date until he in fact has graduated. If a resident who is listed in the "Graduates xxxx" group subsequently fails to graduate, he must be removed from the "Graduates xxxx" group when he leaves the program.

Expected use of group: The "Graduates xxxx" groups from all programs will be consolidated at the GME Office level into corresponding enterprise-scale "All MUHA Graduates xxxx" super-groups which can be used by enterprise-level staff for analytical purposes. At the level of the individual program, the "Graduates xxxx" groups may be used for a variety of purposes such as comparative analyses (old classes vs. new classes) or generation of address labels for ACGME-mandated surveys of graduates.