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Administrator Portal Overview

Urgent Tasks

On the portal page, administrators have a “task list” called urgent tasks. These are links to various tasks the administrator will need to complete. Whenever an urgent task is indicated, it will appear in red in the upper left hand corner of the portal or home page.

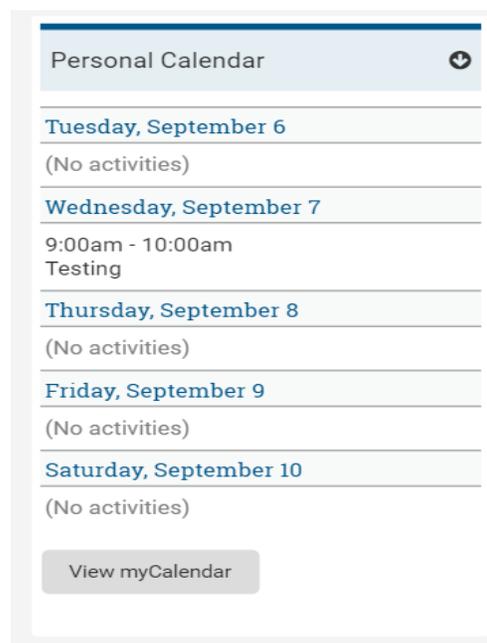


Examples of urgent tasks include:

1. Resident absence requests (approving absence requests)
2. Expiring medical licenses (updating the expiration date, if available to programs)
3. Expiring site contracts (notification that a site contract is about to expire)
4. Evaluation request (if identified as an evaluator)
5. Late Evaluation notice (if identified as an evaluator)
6. Resident released to the training program (if another training program has released their resident or fellow to the training program’s schedule)

Personal Calendar

Each user type in MedHub has a personal calendar that can be used to post calendar items pertinent to their daily or administrative activity. This is NOT the same as the rotation schedule. The personal calendar is found on the left side of the portal page. The view of the personal calendar on the portal page is a rolling week of 5 days.



Users can also view the personal calendar on a monthly basis by selecting the “View my Calendar” button. There are particular calendar items that are automatically “pushed” to the personal calendar of administrators, faculty and/or resident user types. These items are:

1. Conferences
2. Assigned clinics and shifts/calls (resident view only)
3. Absences (vacations, away conferences, LOAs of the resident)

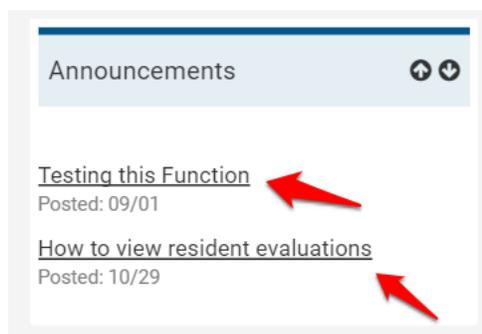
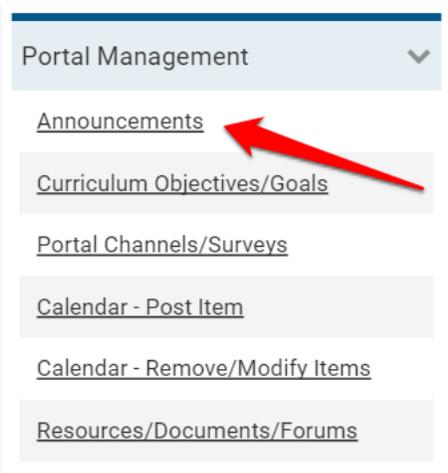
Administrators who have access to more than one training program will see conferences of all their programs in the personal calendar as well. All users can opt to add their own personal meetings and appointments to the monthly calendar. Administrators have the ability to post calendar items to the personal calendar of any faculty and resident users as well.

All user types have the ability to sync items in their MedHub personal calendar to Microsoft Outlook or Google calendars, or sync to their iPhone or Android smart phones. Other smart phones are currently not available for syncing the personal calendar. The ability to sync is found at the top of the monthly personal calendar.

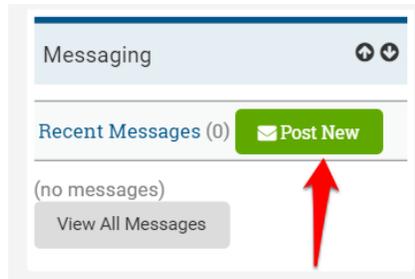
There is NOT a way to sync from Outlook or Google, or the iPhone or Android to MedHub.

Announcements and Messaging

Administrators, Program Directors and Associate Program Directors have the ability to post announcements to various users’ home pages. They have an “Announcement” link where they can create and manage these announcements. These announcements are posted to the Announcement section on the left hand side of the home page. Announcements can be posted to specific users (i.e. residents, faculty) or down to the PGY level.

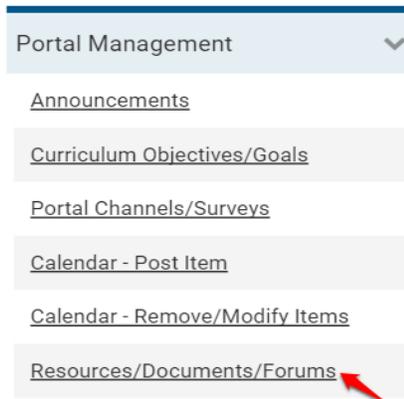


All user types have the ability to add or post messages that will be delivered to another user or a group of users within the MedHub system. This is separate from a traditional e-mail client such as Outlook, Google, Hotmail, Yahoo, etc. However, when creating a message, the user has the option to send this same message to the user's e-mail address. The e-mail address is the primary e-mail found in the demographic profile of that user.

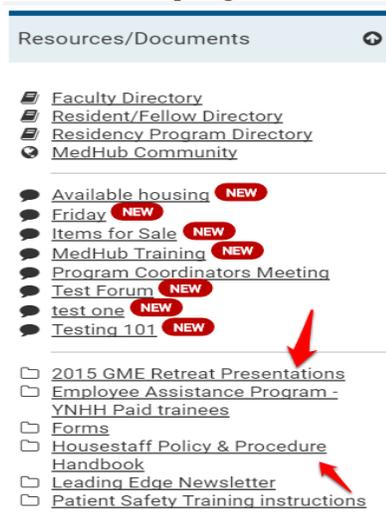


Resources/Documents

Administrators, Program Directors and Associate Program Directors have the ability to post particular resources and documents to users' home pages. These resources/documents are posted to the Resources/Documents section on their home pages.



The administrator, Program Director or Associate Program Directors are able to upload files, Internet links as well as folders to help organize the files or Internet links. These resources are information pertinent to the individuals associated with the program.

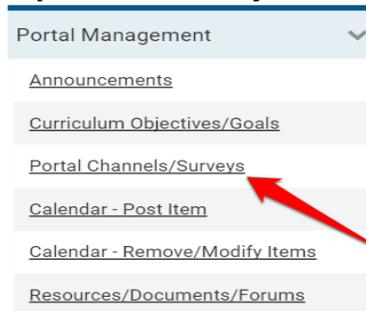


There are permanent links under the Resources/Documents section where all users can see directory information pertinent to their training program or the institution.

1. Faculty Directory – a list of faculty in the user’s training program(s) that can include their pager number, cell phone, work phone, e-mail address and photo. (This information flows from the user’s demographic profile.)
2. Resident/Fellow Directory – a list of residents or fellows in the user’s training program that can include pager number, work phone, e-mail address and photo. (This information flows from the user’s demographic profile.)
3. Residency Program Directory – a list of all residency and fellowship programs at the home institution that also identifies the Program Director, Associate Program Director, primary Program Administrator, and Chief Residents.
4. MedHub Community – an option for MedHub users to view interactive training tools such as video tutorials, bulletin boards, forums and other documents.

Portal Channels/Surveys

Administrators have the ability to add informational channels to the home pages of users associated with their programs, as well as an on-line survey option if a program would like to poll their residents, fellows or faculty about something program specific that everyone can see.



Administrators have the ability to set-up various channels that include newsfeed channels and specific information channels for residents, faculty, and other administrators. These “channels” are ways for programs to provide other information to residents, faculty and other administrators in their program that is important and cannot be removed by the user. Only the program has the ability to remove the channel. These channels will appear on the right hand side of the user’s home page.

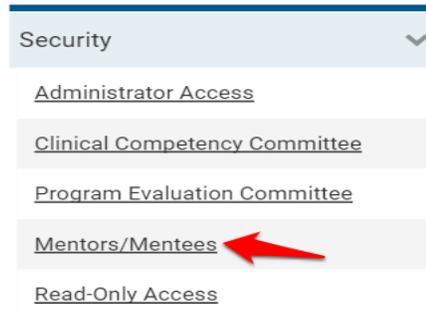
Access

Administrators can grant particular users read-only access to particular functionality as well as grant particular faculty members mentor access.

1. Read-Only Access – this gives a particular user (that is usually not a faculty member or a resident) read-only ability to items such as the rotation schedule, conference schedule, procedure certifications, and resources/documents of that program. These individuals would have a MedHub log-in, but only be able to read what is available to them.



2. **Mentor Access** – this gives certain faculty members the ability to see information pertaining to individual residents. This may include evaluation information, procedure information, conference attendance information, duty hours, portfolios and demographics.



The administrator can enable mentor access for certain faculty members as well as define what information that faculty member should be able to see of a particular resident or a group of residents. Program Directors should have mentor access to ALL RESIDENTS for all functionalities as they will be able to see the information and reporting on all of their trainees.

Learning Modules/Testing

Administrators can create learning modules in MedHub. These learning modules are simple modules made up of several components such as:

1. PowerPoint presentations
2. Uploaded files
3. Associated Internet links

The administrator can manage this information by delivering modules to the users who need to review them as well as report on who has accessed the modules.

Administrators can also create tests in MedHub where they can also be delivered and reported on. Tests can also be associated with the learning modules to confirm the user has reviewed the presentation, read an uploaded file, or accessed the Internet link.

Resident/Faculty Portfolios

Residents and faculty have the ability to maintain and manage their own personal information. The administrators can add to the resident or faculty portfolios (including adding CME credit for faculty) on behalf of the resident or faculty as well as review the information that has been uploaded, if needed.

Trainee On-Boarding

If this is enabled by the institution, administrators may see a link called, "Trainee Applications," "Trainee On-Boarding," "Resident On-Boarding, etc. The name of the link is customized by the institution. This functionality allows the administrator to monitor the documentation and information related to the on-boarding of incoming residents or fellows pertaining to the administrator's training program. The on-boarding information required by an incoming trainee is managed by the GME Office.

Program Accreditation

Administrators have the ability to review accreditation information pertaining to reviews, site visit/self-studies and resident or faculty surveys. Programs can upload any required policies, correspondence and initiate program annual evaluation information. Programs can also upload surveys downloaded directly from the ACGME website.

Program Scorecards

Administrators can also monitor program scorecard information that provides dashboard data about the program. Scorecards are generated by the GME Office and any rights to enter data into particular fields is up to the discretion of the GME Office.

Program Settings

For particular functionality such as scheduling, evaluations, procedures, conferences, etc., administrators can enable particular settings that are pertinent for the program. These are options the administrator can choose to turn on or off based on the needs of the program. Each functionality has its own list of settings or options.

Resident Dashboards

Administrators can create and generate particular dashboard reports on resident or fellow information. These dashboard reports combine various data elements into one report of a given resident or fellow. The administrator can also automatically generate these reports so the Program Director receives these reports on a regular basis.

Sites/Funding

This link provides the administrator a listing of sites associated with his/her training programs. Any sites that are not listed can be requested by the administrator. The request is sent to the GME Office for approval and addition to the institutional site list. Administrators will also be able to view how their trainees are funded by particular funding sources.

Task Wizards

Administrators have the ability to run particular task wizards that will help them populate information between each academic year. The GME Office determines the task wizards available to programs based on institutional process, but the common task wizard's programs may have access are:

- New schedule wizard
- Schedule population wizard
- Resident promotion/advancement wizard
- Resident termination/graduation wizard
- ERAS import wizard
- Demographic batch import wizard
- Resident to Faculty Transition wizard
- Conferences Import wizard
- Procedure Clean-Up wizard

Trainee Job Descriptions

If enabled by the GME Office, administrators can create job descriptions pertinent for each PGY level. This provides the institution the ability to understand and review the responsibilities of each PGY level, including particular supervision levels.

Newsfeed Channels/Other Dashboards

MedHub users have the ability to add particular newsfeed channels and program dashboard channels pertaining to evaluation completion summary, duty hour week submissions from the prior week, and resident absences for the week. MedHub provides users many news channel options that the user can opt to view on his/her home page as well as remove when needed. This is different than creating portal channels that are locked to users and not able to be removed from the user's home page.

Trainee & Faculty Demographics

Trainee (Resident/Fellow) Demographics

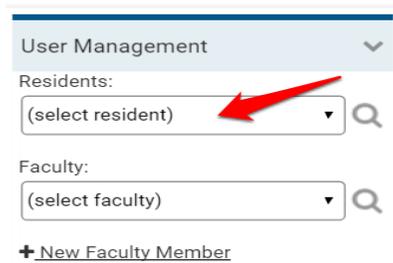
In most MedHub deployments, trainees will already be present in the training program. Any trainees that will need to be added should be provided to the GME Office. Essential information needed for GME to add is:

- First and last name of trainee
- PGY level
- Program name
- Anticipated start date
- Projected end date

Please note that the term “resident” is used throughout MedHub and encompasses all trainees within the system, this includes fellows. The training history of the resident or fellow will indicate the trainee type (i.e. resident, fellow, etc.).

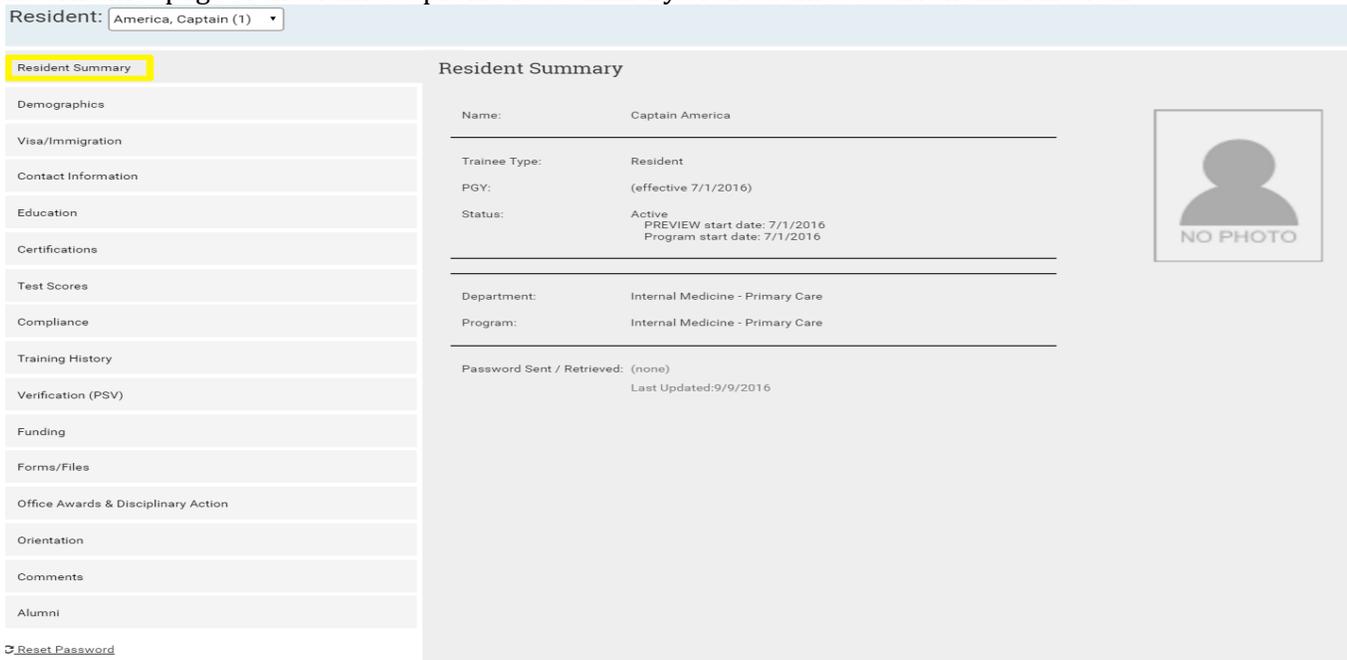
To find a particular trainee:

1. Select a trainee from the “Residents” drop down list found on the MedHub portal page (i.e. Home tab).



The screenshot shows the 'User Management' section of the MedHub portal. It features a 'Residents:' dropdown menu with the text '(select resident)' and a search icon. A red arrow points to this dropdown. Below it is a 'Faculty:' dropdown menu with the text '(select faculty)' and a search icon. At the bottom, there is a '+ New Faculty Member' link.

2. The first page of the trainee’s profile is a summary of the trainee’s current information.



The screenshot displays the 'Resident Summary' profile page for a user named 'America, Captain (1)'. The page is divided into a sidebar on the left and a main content area on the right. The sidebar contains a list of navigation options: Resident Summary (highlighted), Demographics, Visa/Immigration, Contact Information, Education, Certifications, Test Scores, Compliance, Training History, Verification (PSV), Funding, Forms/Files, Office Awards & Disciplinary Action, Orientation, Comments, and Alumni. At the bottom of the sidebar is a 'Reset Password' link. The main content area is titled 'Resident Summary' and contains the following information:

| | |
|----------------------------|--|
| Name: | Captain America |
| Trainee Type: | Resident |
| PGY: | (effective 7/1/2016) |
| Status: | Active PREVIEW start date: 7/1/2016 Program start date: 7/1/2016 |
| Department: | Internal Medicine - Primary Care |
| Program: | Internal Medicine - Primary Care |
| Password Sent / Retrieved: | (none) Last Updated: 9/9/2016 |

On the right side of the main content area, there is a placeholder for a profile picture with the text 'NO PHOTO'.

If a trainee has forgotten his/her password, the administrator can send him/her an e-mail by selecting the “reset password” link located in the lower left hand side of their profile.

Trainee Demographic Data Validation

To confirm that each trainee has the correct information, review the following trainee demographic data:

1. The correct trainees are listed in the training program (located by the drop down in the upper right of the demographic profile).
2. There are no trainees missing from the training program.
3. Trainees are at their correct PGY level (located on the summary tab or on the training history tab).
4. The start and end dates of the current PGY level are correct (located on the training history tab).

If any trainees are missing or any demographic information needs to be modified, including their training history information, please contact the GME Office.

To review and/or add particular personnel information of the trainee, select the links on the left hand side of the trainee's demographic profile. Important tabs to review:

1. **Demographics** – This tab provides basic demographic information of the trainee. Some fields will have write access and some fields will only have read-only access. Contact the GME Office if any fields that are read-only need to be modified.

Resident: America, Captain (1) ▾ Save

Demographics

Full Name: Captain America [Edit Name](#)  [Upload](#)

Prof. or Nickname:

Username: Access: ✓

SSN: Practitioner ID: (no data)

Canadian

Place of Birth: Date of Birth: 

Gender: Male ▾

Ctry. of Citizenship: United States ▾

Ethnic Origin: Not Specified ▾

Benefits: Yes ▾ Parking Form: Yes ▾

Data Coll. Form: Yes ▾ Empl. ID:

Temp. SSN: NPI:

Marital Status: Single ▾

[New Resident](#)
[Reset Password](#)

2. **Contact Info** – This tab provides essential contact information of the trainee. Any read-only fields will need to be modified by GME.

Resident: America, Captain (1) Save

Resident Summary

Demographics

Visa/Immigration

Contact Information

Education

Certifications

Test Scores

Compliance

Training History

Verification (PSV)

Funding

Forms/Files

Office Awards & Disciplinary Action

Orientation

Comments

Alumni

[New Resident](#)

[Reset Password](#)

Contact Information

Email Address:

Email (secondary):

Pager:

Home Phone:

Work Phone:

Cell Phone:

Pref. Contact: Email

Address #1: State: Michigan

Address #2: Zipcode: 48130

City:

Country: United States Last Updated:

Address #1: State:

Address #2: Zipcode:

City:

Country:

3. **Education** – This tab provides a history of past educational institutions from undergraduate through medical or dental school. Any read-only fields will need to be modified by the GME Office.

Resident: America, Captain (1) Save

Resident Summary

Demographics

Visa/Immigration

Contact Information

Education

Certifications

Test Scores

Compliance

Training History

Verification (PSV)

Funding

Forms/Files

Office Awards & Disciplinary Action

Orientation

Comments

Alumni

[New Resident](#)

[Reset Password](#)

Education

Medical/Dental School:

School Name: WA - Obsolete - Use Code 82050 (Un of Washington...) +Add School to List

Degree: M.D. +Add Degree Type Graduated: Yes

Attended: 07/01/2002 to 05/0/2010 (MM/DD/YYYY)

Graduate School:

School Name: +Add School to List

Degree: .. +Add Degree Type Graduated: --

Attended: to (MM/DD/YYYY)

Undergraduate School:

School Name: +Add School to List

Degree: .. +Add Degree Type Graduated: --

Attended: to (MM/DD/YYYY)

Education Comments:

4. **Certifications** – This tab provides a listing of various certifications completed by the trainee. Any read-only fields will need to be modified by the GME Office. If any program-specific certification fields need to be added, contact MedHub support.

Resident: America, Captain (1) Save

Resident Summary

Demographics

Visa/Immigration

Contact Information

Education

Certifications

Test Scores

Compliance

Training History

Verification (PSV)

Funding

Forms/Files

Office Awards & Disciplinary Action

Orientation

Comments

Alumni

[New Resident](#)

[Reset Password](#)

Certifications

License: License #* Issued: Expires: Type:* State:*
 -- CT

DEA: License #: Issued: Expires:

Hospital DEA: License #: Issued: Expires:

Controlled Subst.: License #: Expires:

ECFMG: License #: Issued: Expires:

ACLS: Course: Expires:

ACLSI: Course: Expires:

CPR/BLS: Issue Date: Expires:

ATLS: Course: Expires:

NALS: Issue Date: Expires:

PALS: Issue Date: Expires:

PECOS: Effective Date: (no data) Enrolled: (no data)

ORP:

AOA Membership: Member #: (no data)

NOTE: all expiration and issue dates must be of the form (MM/DD/YYYY)

Certifications Comments:

5. **Test Scores** – This tab provides a method to maintain particular test scores of each trainee for reporting purposes. If any program-specific test fields need to be added, contact MedHub support.

Resident: America, Captain (1) Save

Contact Information

Education

Certifications

Test Scores

Compliance

Training History

Verification (PSV)

Funding

Forms/Files

Office Awards & Disciplinary Action

Orientation

Comments

Alumni

[Reset Password](#)

Test Scores

USMLE Step 2 CK: 3-Digit: 2-Digit: Issue Date: Examinee ID:

USMLE Step 2 CK: 3-Digit: 2-Digit: Test Date: Examinee ID:

USMLE Step 3: Step 1: Step 2: Step 2 (PE): Step 3:

COMLEX: Percentile: Year:

In-Service Exam (1): Percentile: Year:

In-Service Exam (2): Percentile: Year:

In-Service Exam (3): Percentile: Year:

In-Service Exam (4): Percentile: Year:

In-Service Exam (5): Percentile: Year:

In-Service Exam (6): Percentile: Year:

In-Service Exam (7): Percentile: Year:

In-Service Exam (8): Score:

Sam Test:

NOTE: all expiration and issue dates must be of the form (MM/DD/YYYY)

Test Scores Comments:

6. **Training History** – This tab provides a history of post graduate training and other post-medical school events of each trainee.

Resident: America, Captain (1) Save

Resident Summary

Demographics

Visa/Immigration

Contact Information

Education

Certifications

Test Scores

Compliance

Training History

Verification (PSV)

Funding

Forms/Files

Office Awards & Disciplinary Action

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Comments

Alumni

[Reset Password](#)

Training History

Post Graduate History

Projected End Date: 06/30/2017 IRP Limit Date: (no data)

Termination Date: (no data) Orientation Date: (no data)

Projected Start Date: 07/01/2016 Alumni: (no data)

Post Training: Faculty Other:

Training History Comments:

[Home](#) | [Schedules](#) | [Procedures](#) | [Evaluations](#) | [Conferences](#) | [Reports](#) | [Help](#)
 Copyright © 2002-2016 MedHub, Inc. - All Rights Reserved [Legal Notice](#) | [Privacy Policy](#)

| Type: | Location/Specialty: | Funding: | Contract: | Start Date: | End Date: | Actions: |
|--------------|--|------------|---|-------------|------------|----------|
| Resident (1) | Demo HealthCare System Internal Medicine - Primary Care Res. Code: 1400 Internal/External Moonlighting: (0 hrs/wk) | -- | Unapproved Rate: 7/1-1 Contract | 07/01/2016 | 07/05/2017 | -- |
| | LOA - Paternity Leave (paid) (pending) (31 days - 5 day training ext.) | | 08/01/2016 | 08/31/2016 | | |
| | <i>Unpaid Date Period</i> | 08/16/2016 | 08/31/2016 | | | |

7. **Forms/Files** – This tab provides both programs and GME avenues to add specific files for an individual trainee where any documentation can be kept under his/her on-line demographic profile. Both the program and the GME Office can determine if the document should be shared with the trainee.

Resident: America, Captain (1) Save

Resident Summary

Demographics

Visa/Immigration

Contact Information

Education

Certifications

Test Scores

Compliance

Training History

Verification (PSV)

Funding

Forms/Files

Office Awards & Disciplinary Action

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Forms/Files

Resident Files

| File Name: | Modified: | Size: | Shared: | Share w/ Mentor: | Author: | Actions: |
|---|-----------|---------|---------|------------------|---------|-------------------------------|
| Batch Folder | -- | 0 files | -- | -- | -- | -- |
| CCC/Feedback | -- | 0 files | -- | -- | -- | Modify Folder |
| CV | -- | 0 files | -- | -- | -- | Modify Folder |
| EVALUATIONS | -- | 0 files | -- | -- | -- | Modify Folder |
| IM Primary | -- | 0 files | -- | -- | -- | Modify Folder |
| Institution-Wide Folder | -- | 0 files | -- | -- | -- | -- |
| Test Folder 1 | -- | 0 files | -- | -- | -- | -- |

[+ Upload File](#) [+ Add Program-wide Folder](#) [+ Add Trainee-Specific Folder](#) [Search All Files...](#)

General Forms

| Form Name: | Type: | Last Printed By: |
|----------------------|-------|------------------|
| Test | PDF | (not printed) |

Verification Letters

| Sent To: | Sent Date: | Form: | Last Printed: | Actions: |
|----------|------------|-------|---------------|----------|
| (none) | | | | |

Faculty demographics - Associating and/or Adding Faculty to the Training Program

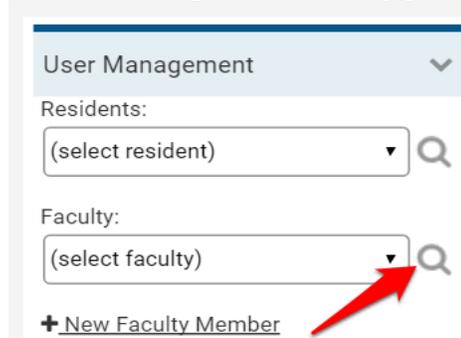
Faculty should be included in the faculty pull down menu for the training program if:

- a. They regularly evaluate trainees in the training program.
- b. They need access to schedules, directories, procedure verifications, etc.
- c. They are a program director, associate program director or faculty mentor in the training program.

If none of the conditions above apply, but a faculty member who may not have an appointment with the institution occasionally evaluates the trainees, these can be added within the evaluation functionality as “outside evaluators”.

To search for and associate existing faculty to the training program, follow these steps:

1. Select the magnifying glass icon to the right of the faculty pull-down menu from the Home page.



2. Type in the last name of the faculty member that should be associated with the training program and select “search.”

Faculty Search

Search Terms:

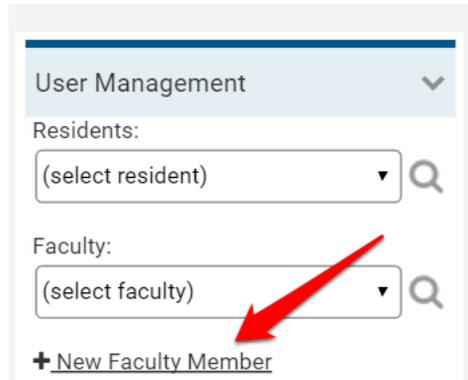
3. Click on the “Add to...” link/button and the existing faculty member will be associated with the training program and will appear in the faculty drop-down on the portal or home page.

Search Results (5)

| Name: | Default Program: | Status: | Actions: |
|-----------------------------------|--------------------|----------|--|
| Berger, Jamison | Geriatric Medicine | Active | -- |
| Berger, Katrina | Training Program 3 | Active | <input type="button" value="Add to DERM"/> |
| Berger, Kristofer | Ophthalmology | Inactive | -- |
| Berger, Sebastien | Training Program 2 | Active | <input type="button" value="Add to DERM"/> |
| Bergeron, Jewel | Medical School | Active | -- |

If the faculty member does not come up in the search, select the “New Faculty Member” button.

Administrators also have the option to add new faculty from the main portal page. This link can be found under the faculty pull-down menu.



Enter first name, last name, user name and email address of the faculty member. Select the Save button in the lower left corner to save this information.

Add New Faculty User

First Name:*

Last Name:*

Start Date: 

Username:* Send password by email

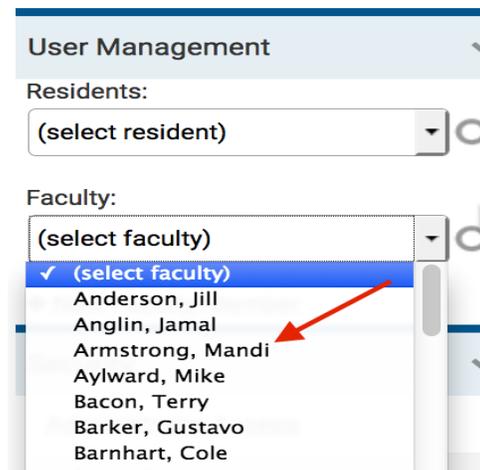
Email Address:*

The Faculty member will be added to the training program. Repeat this step, if necessary, until all faculty specific to that training program have been added to the faculty pull-down menu.

Removing a faculty member from the drop down list:

If there is a faculty member that needs to be removed from the drop down list because they are not a part of the training program, administrators have the ability to remove them from the list of faculty members.

1. Select the faculty member from the pull down menu that should be removed from the list of faculty members.



2. Click on the Programs/Services tab from the faculty profile.

Faculty Member: Bacon, Terry

Faculty Information

Programs/Services

Forms/Files

Schedule

[New Faculty Member](#)

[Archive Faculty Member](#)

[Reset Password](#)

First Name *: Terry

Last Name *: Bacon

Suffix *:

Salutation: Dr. ▾

Title:

Specialty:

University ID:

Password Sent: 2/25/2014 09:07am (EST)

Photo: NO PHOTO

Photo: Upload

Signature: Upload

3. Select the “Add/Modify Programs” button.

Faculty Member: Bacon, Terry

Faculty Information

Programs/Services

Forms/Files

Schedule

[New Faculty Member](#)

[Reset Password](#)

Programs:

Internal Medicine - Primary Care [default]

+Add/Modify Programs

Service Groups:

Internal Medicine - Primary Care

AMB - Optimus Brdgt

AMB-1

AMB-Allergy-E

4. Uncheck the program the faculty should be removed from and click on Save.

Faculty Member: Bacon, Terry

Faculty Information

Programs/Services

Forms/Files

Schedule

Programs:

Anesthesiology

Adult Cardiothoracic Anesthesiology

Ambulatory Anesthesia

Anesthesia Patient Quality and Safety Fellowship

Bi Coastal Anesthesia

Please note that at least 1 program MUST be checked for each faculty member.

If a faculty member is no longer with the institution, administrators can remove the faculty member’s access from MedHub as well as his/her active status and archive them if wanted.

1. From the faculty member’s faculty information tab, uncheck the “Active” and/or “Access” checkbox and select Save.

| | | | |
|-----------------|--|----------------|-------------------------------------|
| Username * : | <input type="text" value="Terry.Bacon"/> | Active: | <input checked="" type="checkbox"/> |
| Employee ID * : | <input type="text"/> | Access: | <input checked="" type="checkbox"/> |
| Staff Type: | <input type="text"/> | Review Qtr * : | (none) |

Unchecking the “Active” checkbox will gray out the name of the faculty member in the drop down list in case the administrator still may need to access the faculty member’s profile. Unchecking the “Access” checkbox does not allow the faculty member to access MedHub any longer.

Faculty Member:

| | |
|---------------------|----------------|
| Faculty Information | First Name * : |
| Programs/Services | Last Name * : |
| Forms/Files | Suffix * : |
| Schedule | Salutation: |
| | Title: |
| | Specialty: |
| | University ID: |

[New Faculty Member](#)
[Archive Faculty Member](#) 
[Reset Password](#)

To archive a faculty member, once the "active" and "access" boxes have been unchecked, a link to "archive faculty" will appear. When you select this link, you will be given an opportunity to confirm that you would like the faculty profile to be archived. You will select "yes" and your faculty members profile will be archived.

Administrators also have the ability to send faculty a “reset password” e-mail in case a faculty member has forgotten his/her password. This is located in the bottom left hand side of the faculty profile.

Faculty Member:

| | |
|---------------------|----------------|
| Faculty Information | First Name * : |
| Programs/Services | Last Name * : |
| Forms/Files | Suffix * : |
| Schedule | Salutation: |
| | Title: |
| | Specialty: |
| | University ID: |

[New Faculty Member](#)
[Archive Faculty Member](#)
[Reset Password](#) 

Schedule Management

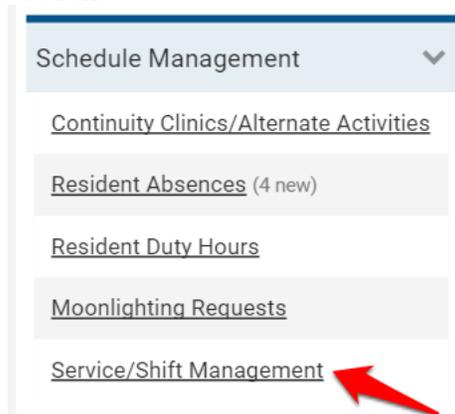
There are five steps to build a master rotation schedule in MedHub:

1. Defining rotations and/or services
2. Defining continuity clinics/alternate activities
3. Recording resident absences (i.e. vacation, sick time, away conferences, other leaves of absence.)
4. Creating shifts and calls/defining service-based clinics
5. Populating the master rotation schedule with these kinds of activities and services

Defining Rotation and/or Services:

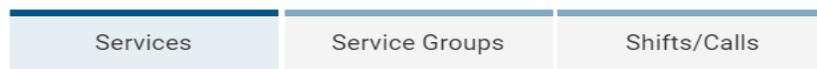
Services in MedHub are defined as the activities that a trainee is scheduled to for days at a time. Programs often call services "rotations". Trainees should be scheduled to services every day of their active training, including vacation days.

1. From the main MedHub portal page {Home}, select the "Services/Shift Management" link under the Schedule Management section.



2. Select the "Add Service" button for the appropriate academic year.

Service Management



Click on a service below to modify its settings. You can change its order on the ro

Academic Year: Schedule:

| Service: | Site(s): |
|----------|----------|
| (none) | |

3. Enter the following information for the rotation and/or service:

- Service name
- Service abbreviation
- Service group (leave as “create new group” unless you have a split schedule.)
- Service type – select appropriate patient care type. If unsure, select “Patient Care-Mixed/Other.”
- Trainees per rotation (identifies the number of trainees that normally rotate on this service at the same time)
- Primary site – select appropriate location for this rotation
- Scheduling method – (leave as “standard”)
- Select the “Submit” button
- Repeat this process for each rotation/service as this will create a list of rotations/services that will populate the master rotation schedule.

[Home](#) » [Services](#) » [New Service](#)

New Service

Academic Year: July 1, 2018 - June 30, 2019

Service Name:*

Abbreviation:*

Service Group:* (create new group) ▼

Service Type:* Patient Care - Mixed/Other ▼ ⓘ

Cost Center:

Trainees per Rotation: (undefined) ▼ ⓘ

Primary Site:* 6 Million Dollar Man Medical Rehabilitation Center ▼ ⓘ
[[multiple sites](#)]

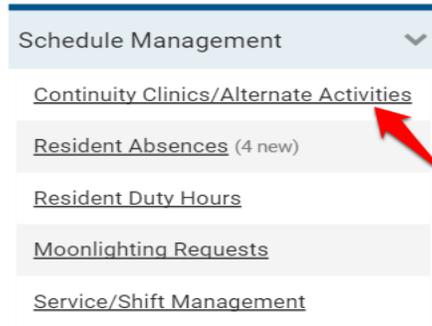
Scheduling Method:* Standard ▼ ⓘ

Activity Description:
(optional - for audit)

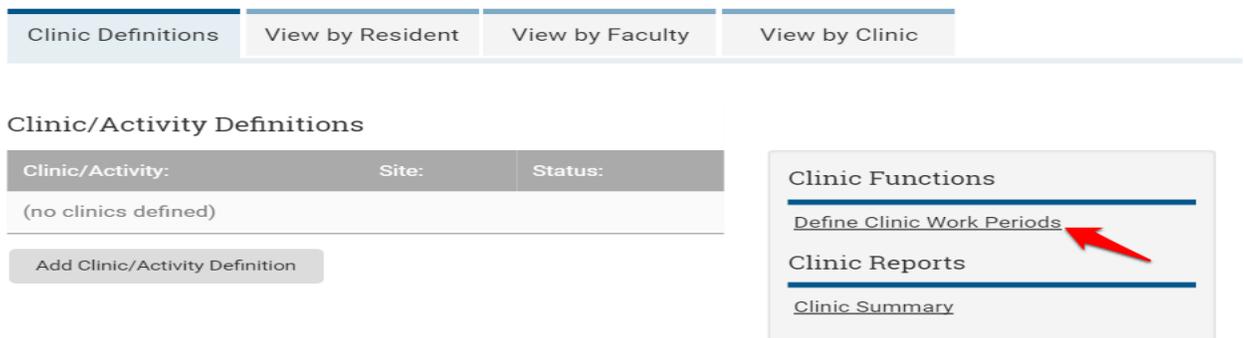
Defining Continuity Clinics and Alternate Activities:

A Continuity clinic is defined in MedHub as a regularly occurring activity – usually a half day – where the same trainee is expected to go to that activity for a contiguous period of time. The activity may not occur every day during the rotation period, but intermittently on a regular basis for the same trainee. This kind of activity is not necessarily directly associated with a rotation or service. To define and schedule a trainee to these clinics or activities:

1. Select Continuity Clinics/Alternate Activities link from the MedHub portal page (Home) under the Schedule Management section.



2. Define and/or review clinic work periods by selecting the "Define Clinic Work Periods" link.
Continuity Clinics/Alternate Activities



- a. There is a list of default clinic work periods already available. However, administrators can add more clinic work periods if needed. To create additional work periods, select the "Add CC/AA Work Period."

Work Periods

| Work Period: | Times: | Hours: | Status: |
|--------------|----------------|--------|---------|
| <u>AM</u> | 8:00am-12:00pm | 4.0 | Active |
| <u>AM/PM</u> | 8:00am-5:00pm | 9.0 | Active |
| <u>PM</u> | 1:00pm-5:00pm | 4.0 | Active |

Add CC/AA Work Period (indicated by a red arrow)

3. To define the continuity clinic/alternate activity information, select the "Add Clinic/Activity Definition" button.

Continuity Clinics/Alternate Activities

Clinic Definitions View by Resident View by Faculty View by Clinic

Clinic/Activity Definitions

| Clinic/Activity: | Site: | Status: |
|----------------------|-------|---------|
| (no clinics defined) | | |

Add Clinic/Activity Definition

Clinic Functions

- Define Clinic Work Periods
- Clinic Reports
- Clinic Summary

4. Enter the following information of the continuity clinic or alternate activity:
- Name of the clinic or activity
 - Abbreviation
 - Site – location of the clinic or activity
 - Resident Slots - identifies the number of trainees that rotate at this clinic or activity
 - Faculty Slots – if the program chooses to schedule faculty clinics, this identifies the number of faculty that are scheduled to this clinic or activity
 - Select “Submit”
 - Repeat this process for each continuity clinic/alternate activity as this will create a list of clinics/activities

Add Clinic/Activity Definition

Clinic Name:*

Clinic Abbreviation:*

Clinic Status:* ▾

Site:* ▾

Resident Slots:* ▾

Faculty Slots:* ▾

Student Slots:* ▾

Comments:

5. Schedule trainees to a continuity clinic or activity by selecting the “View by Resident” tab.

Clinic Definitions View by Resident View by Faculty View by Clinic

Clinic/Activity Definitions

| Clinic/Activity: | Site: | Status: |
|--|----------------------|---------|
| Away Elective | Elective - Away | Active |
| Bridgeport Hospital | Bridgeport Hospital | Active |
| KBH Activity | Appointment Complete | Active |
| Post Call Day - Norwalk Hospital | Norwalk Hospital | Active |
| Training - Norwalk Hospital | Norwalk Hospital | Active |

Add Clinic/Activity Definition

Clinic Functions

- Define Clinic Work Periods
- Clinic Reports
- Clinic Summary

6. Select the appropriate trainee to be scheduled to this clinic or activity for the correct academic year.

Clinic Definitions | **View by Resident** | View by Faculty | View by Clinic

Resident:

Add Clinic/Activity

| Date: | Clinic/Activity: | Site: | Period: | Hours: | Status: | Pre-Populate: | Actions: |
|--------|------------------|-------|---------|--------|---------|---------------|----------|
| (none) | | | | | | | |

Add Clinic/Activity

7. Click on the “Add Clinic/Activity” button.

Clinic Definitions | **View by Resident** | View by Faculty | View by Clinic

Resident:

Add Clinic/Activity

| Date: | Clinic/Activity: | Site: | Period: | Hours: | Status: | Pre-Populate: | Actions: |
|--------|------------------|-------|---------|--------|---------|---------------|----------|
| (none) | | | | | | | |

Add Clinic/Activity

8. To add a clinic or activity for a particular trainee:

- Select either the *single clinic* or *multiple clinic* options.
- Select the clinic or activity to be assigned to this trainee.
- Identify a date range that this particular trainee will be scheduled to this clinic or activity (i.e. 1 month, all year, etc.).
- Select the appropriate clinic work period for this clinic or activity.
- Opt to pre-populate the trainee’s duty hour time sheet with these hours.
- Identify the day of the week this trainee will be scheduled to this clinic or activity.
- Identify how often this trainee will be scheduled to this clinic or activity.
- Save by selecting the “Submit” button.
- Repeat the process for the remaining trainees who also have clinics or such activities.
- Once all clinics have been added for each trainee, this will automatically populate the master rotation schedule (View “by resident-details”) as well as their individual schedule.

Add Clinic/Activity

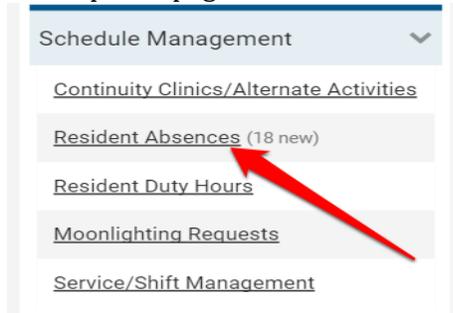
Resident: **Dr. America, Captain**
Academic Year: July 1, 2016 - June 30, 2017
Method: Multiple Clinics
 Single Clinic

Add Multiple Clinics
Clinic/Activity:* Chase Clinic
Date Range:* From: (MM/DD/YYYY) To: (MM/DD/YYYY)
Period:* ICU W AM (12:00am-10:00am)
 Pre-populate duty hours
Status:* Active
Day of Week:* Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday
Frequency:* Every week
Shift/Ctrl to select multiple

Recording Trainee Absences:

Absences in MedHub include vacations, sick days, away conferences, and various leaves of absence (LOA).

1. From the main MedHub portal page, select "Resident Absences."



2. Select the "View/Record Absences" tab.

Pending Absence Requests **View/Record Absences** Absence Approval Process Block Dates

Click on the appropriate tab below to record Vacations, Sick Days, Away Conferences, or Leaves of Absence (LOA).

Vacation Sick Days Conference (away) Leave of Absence

Vacation Request Form

Please fill out and submit the form below. * Required

Resident:* America, Captain (1)

Days Recorded:* 0 days (7/1/16-6/30/17; excluding weekends/holidays)

Date Range:* From: To:

Purpose:* (optional)

Status:* Pending (initiate approval process)

3. Identify the type of absence to be recorded by selecting one of the tabs and ensuring the appropriate trainee is selected.

- Select the date(s) for the absence.
- Define the purpose for the absence (if needed).
- Change the status from Pending to Approved (by program).
- Select “Send Request” button.
- Repeat same steps for additional absences for all trainees.
- Once all absences have been added for each trainee, this will automatically populate the master rotation schedule.

Vacation Request Form
Please fill out and submit the form below.

Resident:* [Dropdown menu]

Days Recorded:* 5 days (7/1/16-6/30/17)

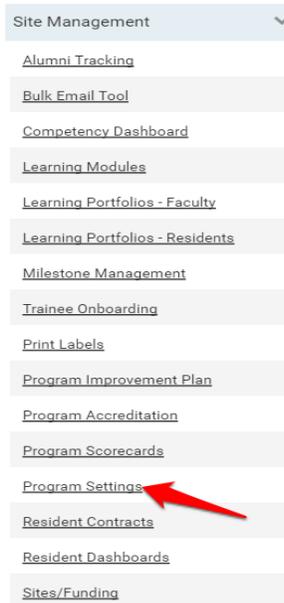
Date Range:* From [Calendar] To [Calendar]

Purpose:* (optional) [Text area]

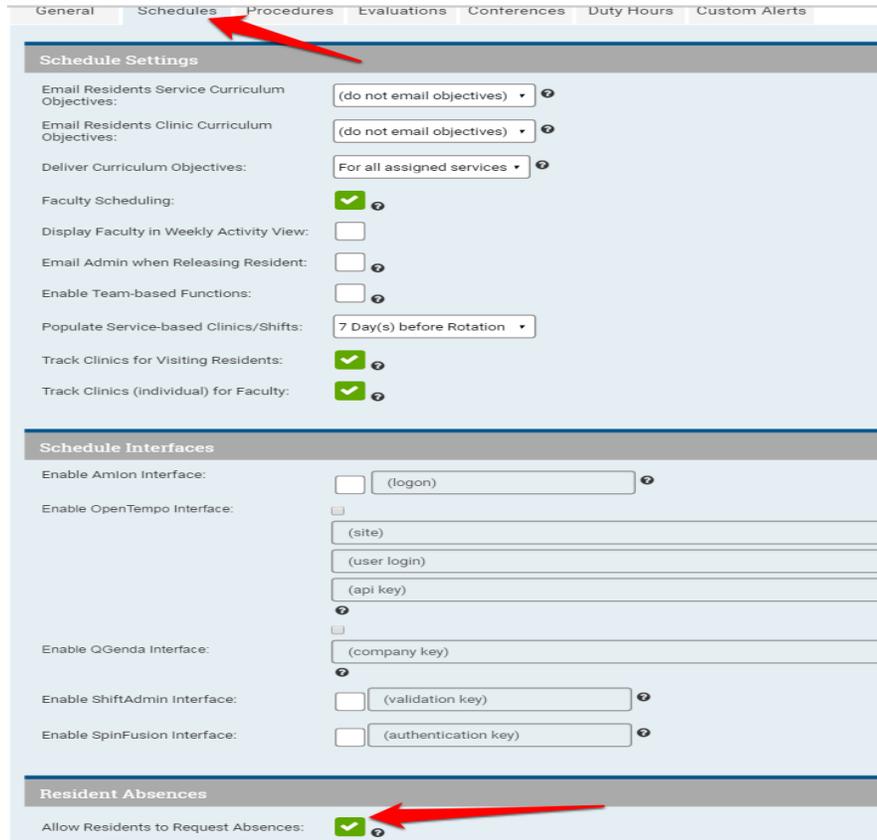
Status:* [Dropdown menu]
Pending (initiate approval process)
✓ Pending (initiate approval process)
Approved (by program)
Reject Request

The program can opt to use MedHub as their absence approval work flow process where the trainee can request absences using this system.

1. To enable this option, select the “Program Settings” link from the portal page under the Site Management section.

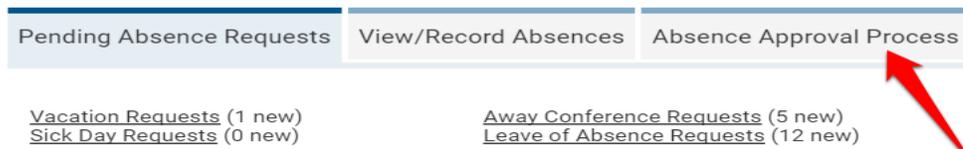


- Select the “Schedules” tab and find the option, “Allow Residents to Request Absences.” This should already be turned on by default. If the program chooses not to use MedHub’s absence request workflow, uncheck the setting and save.

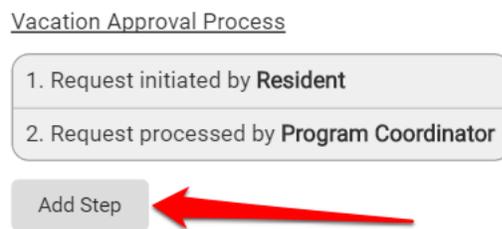


- Once this is enabled, trainees will be provided a link on their MedHub home page to request any scheduled absences. To set up an absence approval process for the training program, return to the “Resident Absences” link from the portal page and select the “Absence Approval Process” tab.

Absence Requests



- The current default set-up flows from the trainee to the program administrator. However, administrators can define other individual flows who need to participate in the approval process. For vacation approvals, the administrator can select the “add step” button to include those individuals that need to approve such requests.



- The administrator selects the individual(s) that need to approve the request.

Vacation Approval Process

1. Request initiated by **Resident**

2. Then, approved by...

One/Any of the following ▾

Chief Resident(s)

Program Director

Service Head(s)

Submit

3. Request processed by **Program Coordinator**

Add Step

- The administrator can determine, in sequential order, which individual(s) need to approve first before the request flows to the next individual(s). Each “add step” indicates the flow of the approval process.

Vacation Approval Process

1. Request initiated by **Resident**

2. Then, approved by **Chief Resident(s)** [remove](#)

3. Then, approved by **Program Director** [remove](#)

4. Request processed by **Program Coordinator**

Add Step

Those individuals selected to receive absence request notifications (i.e. chiefs, program directors, service heads) will receive an e-mail notifying them they’ve received an absence request. They will also see this same alert on their MedHub portal page under Urgent Tasks.

This same process can be followed for away conference approvals as well.

Creating Shifts and Calls:

A Shift and/or call is defined in MedHub as a regularly occurring activity where a ***different*** trainee could be expected to go to that activity over a contiguous period of time. The shift and/or call is consistent, but the trainee is not. To define these shifts or calls:

- From the main MedHub portal page (Home), select the “Service/Shift Management” link under the Schedule Management section and then select one of the rotations or services that was previously created.

Academic Year: Schedule:

| Service: | Site(s): |
|-------------------------------------|-------------------------|
| Barium Service YNHH | Yale New Haven Hospital |
| Body CT - YNHH | Yale New Haven Hospital |
| Body MR | Yale New Haven Hospital |

2. Once a service or rotation is created, shifts and calls can be defined for that particular rotation. A shift/call can be shared with one or more specific rotation(s) or for all rotations occurring in the program. From the update service page, there are three types of shifts/calls in MedHub:

- **Standard service hours** – this is usually a shift that occurs every weekday during the same times (example: Monday – Friday 8:00a – 5:00p). To set standard rotation or service hours, select the gray “Standard Services Hours” and complete the following:
 - Ensure the Shift Status is “Active.”
 - Opt to pre-populate the trainee’s duty hour timesheet with the standard service hours.
 - Select the start time and end time of a standard work day for that rotation or service.
 - Select days of the week.
 - Opt to reproduce these same standard service hours across all other rotations or service that have been created and do not already have standard service hours.

Shifts/Calls 

| Shift Name: | Type: | Users: | Shift Period: | Order: |
|--|------------|-----------|---------------|--------|
| [Standard Service Hours] | (default) | Residents | (inactive) | |
| KBH Weekend Shift/Call | Shift/Call | Res/Fac | (varies) | |

[+ Add Shift/Call](#)

Shift Type:* **Standard Shift Hours**
 Shift Status:* **Active** ▼
 Duty Hours:* (none) ▼

Primary Work Period:

Start Time: 8:00am ▼
 End Time: 5:00pm ▼
 Days:
 Sunday
 Monday
 Tuesday
 Wednesday
 Thursday
 Friday
 Saturday

Note: At least one day is required with a shift time of at least 1/2 hour.

Options: Propagate across all services with undefined standard service hours (in this program)

Submit

- **On-site shift/call** – An on-site shift/call is where the trainee is expected to be in the hospital for a specified period of time.
 - Select the “Add Shift/Call” link located under the Standard Service Hours link.

Shifts/Calls

| Shift Name: | Type: | Users: | Shift Period: | Order: |
|--|------------|-----------|---------------|--------|
| [Standard Service Hours] | (default) | Residents | (inactive) | |
| KBH Weekend Shift/Call | Shift/Call | Res/Fac | (varies) | |

[+ Add Shift/Call](#) 

- Select the on-site shift/call option to create certain shifts for the rotations/services or to create an in-house call. Click “Submit.”

Add Shift/Call

Shift/Call Type: On-site Shift/Call ▼ Submit

- Define the particular shift or in-house call by:
 - Creating a shift/call name
 - Creating an abbreviation for this shift/call
 - Define the number of trainee slots – number of trainees that are on this shift/call at a given time
 - Defining faculty slots (optional) – number of faculty that are on this shift/call at a given time
 - Choose the appropriate site where this shift/call occurs
 - Opt to pre-populate duty hours on the trainee’s duty hour time sheet
 - Opt to share this same shift or call with other rotations/services
 - Define the primary work period for this shift/call, including days of the week this shift/call occurs (note: a time with the (+1) designation means the shift/call time begins on one day and ends the next day)
 - Select “Submit.”

Shift Type: **Shift/Call** ⓘ [CHANGE TYPE]

Shift Name:*

Abbreviation:*

Resident Slots:* 1 ▼ ⓘ

Faculty Slots:* 1 ▼

Student Slots:* 0 ▼

Site(s):* 6 Million Dollar Man Medical Rehabilitation Center ▼ ⓘ

[select multiple]

Shift/Call-Specific Pager: Use specific number:

Autogeneration:* None ▼ Populate weekends ⓘ

Call:* Call (notify paging) ▼

Duty Hours:* Populate Duty Hours ▼ ⓘ

Date Period: Entire Academic Year ▼ ⓘ

Start Date: ⓘ End Date: ⓘ (MM/DD/YYYY)

Services Sharing this Shift/Call: ⓘ [Check/Uncheck All]

DIAGNOSTIC RADIOLOGY

PGY 1 Schedule

American Institute for Radiologic Pathology Musculoskeletal MRI YNHH

- **Home call** – Home call is used when a trainee is NOT expected to be at the hospital unless he/she is called in. The only difference between creating a home call and the on-site shift/call above is that their duty hours cannot be pre populated because it’s difficult to determine if the trainee will be called into the hospital. Follow the same steps above to add home call, however, select “home call” in the drop-down when adding a shift/call type and submit.

Add Shift/Call

Shift/Call Type: Home Call ▼ Submit

Defining Service-Based Clinics:

In addition to creating shifts/calls for a particular service or rotation, programs can also define clinics that are associated with a particular service and only occur while a trainee is rotating on that service.

1. From the service's "update service" page, locate the "Add Clinic" link found just under the shifts/calls.

Clinics ⓘ

| Clinic: | Period: | Day(s): |
|---------|---------|---------|
| (none) | | |

[+ Add Clinic](#)

2. Select the clinic that is associated with the service and identify the days of the week and the work period (i.e., AM, PM, etc.) the clinic occurs. Submit.

Service: Barium Service YNHH

Clinic*:

Trainees*:

In-House House Staff

Rotators

Visiting Resident

Period/Days* (one required):

| | | |
|--|------------------------------------|------------------------------------|
| <input type="checkbox"/> Sunday | <input type="checkbox"/> Sunday | <input type="checkbox"/> Sunday |
| <input checked="" type="checkbox"/> Monday | <input type="checkbox"/> Monday | <input type="checkbox"/> Monday |
| <input type="checkbox"/> Tuesday | <input type="checkbox"/> Tuesday | <input type="checkbox"/> Tuesday |
| <input type="checkbox"/> Wednesday | <input type="checkbox"/> Wednesday | <input type="checkbox"/> Wednesday |
| <input type="checkbox"/> Thursday | <input type="checkbox"/> Thursday | <input type="checkbox"/> Thursday |
| <input type="checkbox"/> Friday | <input type="checkbox"/> Friday | <input type="checkbox"/> Friday |
| <input type="checkbox"/> Saturday | <input type="checkbox"/> Saturday | <input type="checkbox"/> Saturday |

[Submit](#)

3. Once submitted, this tells MedHub that whenever a trainee is scheduled to a particular service, a defined number of days before the service begins, the trainee will be automatically scheduled to the clinic. To determine when the trainee should be scheduled to service based clinics, the setting can be enabled under Program Settings, "Schedule" tab.

Populate Service-based Clinics/Shifts:

Populating the Master Rotation Schedule:

Once all of the rotations/services, clinics, shifts/calls, and absences are defined, the administrator can populate the master rotation schedule.

1. Select the "Schedules" tab found on the top navigation menu from the MedHub portal page (Home).



2. Ensure the “By Resident” view of the rotation schedule is selected.



3. Click on the pencil in the corner of any rotation period. This will bring up a number of drop downs where the particular rotation/service and the start and end dates of those activities can be chosen.



4. Select the rotation/service and a date range when a specific trainee is on a particular rotation/service. If the trainee is scheduled to multiple services within the same rotation block, the administrator can choose the start and end date of each service within the rotation block. If two or more services overlap and both services occur simultaneously, the administrator will need to select the checkbox with a “P” to indicates the primary service. **The “P” ONLY needs to be selected IF the services occur at the same time during the rotation block period.**

| August | | | | |
|---|---------|-------|-------------------------------------|--|
| Service:* | Start:* | End:* | P: | |
| Body MRI - Research Elective | 8/01 | 8/15 | <input type="checkbox"/> | |
| Diagnostic Radiology Elective | 8/01 | 8/15 | <input checked="" type="checkbox"/> | |
| Bone - Musculoskeletal Plain Films - YNHH | 8/16 | 8/31 | <input type="checkbox"/> | |
| (none) | 8/01 | 8/31 | <input type="checkbox"/> | |

5. Repeat until all activities on the rotation schedule have been populated for the entire academic year. If the program has trainees who rotate to other programs the administrator can “release” the trainees to the programs that own the services or rotations where their trainees will rotate. This prevents duplication of rotations/services across the institution. There are 3 questions to consider to help determine if a trainee should be released to another program:

- Who/which program maintains the call schedule of the trainees on that service or rotation?
- Whose/which program’s core faculty is staffing/supervising trainees on that service or rotation?
- Who’s delivering the evaluations to those faculty of that service or rotation?

To release a trainee to another program:

1. Click on the pencil in the corner of that particular rotation period.



- From the bottom of the rotation/service pull-down menu, select “Release to another Program.”

Service: (none) Start: 9/21 End: 10/18

(none)
 Autopsy
 Cytopathology
 >> Release to another Program

- Select the training program in which the trainee will be rotating.

9/21-10/18

(select program)
 Adult Cardiothoracic Anesthesiology
 Ambulatory Anesthesia
 Anesthesia Patient Quality and Safety Fellowship
 Bi Coastal Anesthesia
 Critical Care Anesthesiology
 Obstetrical Anesthesiology
 Pain Medicine
 Pediatric Anesthesiology
 School of Medical Learning
 Internal Medicine Clerkship
 Bionic Institute of Neuromuscular Medicine (BINM)
 Child & Adult Psychiatry
 Coordinator Training
 Training Program 1
 Training Program 10
 Training Program 11
 Training Program 12
 Training Program 13
 Training Program 14
 Training Program 15

Submit

- The administrator can either select the rotation/service the trainee will be rotating in that program or the administrator can choose to have the program administrator from the other program schedule the trainee to that rotation/service.

Select Service:

(select service) Start: 9/21 End: 10/18

(select service)
 ADULT CARDIOTHORACIC ANESTHESIOLOGY
 >> ANES-CARD's admin will schedule
 CARD Schedule
 Cardiac Anesthesiology
 OR Cardiac Cases
 OR-TPV Thoracic & Peripheral Vascular Cases
 Service Test A

It's recommended to select “Admin will schedule,” especially if the administrator does not know on which service the trainee will be rotating. The program administrator from the other program will receive an e-mail as well as an alert on his/her Home page to schedule a released trainee, assuming this is selected under Program Settings>Schedule Tab

- If the administrator chooses to have the other program's administrator schedule his/her trainee and submits, the administrator will see a red RELEASE on the rotation schedule for that block period. This means that the trainee has been released to that program BUT is not yet scheduled to a rotation.

9/21-10/18

Release-ANES-CARD

- Once the program administrator from the other program has scheduled the trainee to one of their services, the service that is owned by the other program will appear in black on the schedule. This is how a program administrator will know if one of their trainees, who has been released to another program, has been scheduled to a rotation.

July

Body CT

Populating Shifts/Calls:

- To schedule the appropriate shift and/or call for a trainee on a particular service/rotation, from the main rotation schedule select the particular rotation/service that has been scheduled for that trainee. This will take the program administrator to the shift/call schedule where the administrator can schedule trainees to those particular shifts and/or calls.



- Locate the shift or call and select the trainee that will be assigned to this shift/call by choosing his/her name from a pull down menu. The number of pull downs is determined by the number of trainee slots that were entered when defining the shift/call. If the program has identified faculty slots when defining the shift/call, these will be indicated on the shift/call schedule in blue.



- Select "submit" at the bottom of the shift/call schedule to save changes.

After populating the master rotation schedule by adding the rotations/services, assigning shifts/calls, and scheduling clinics, the administrator has identified where each trainee is working throughout the academic year. Activities identified in red are either absences or continuity clinics/alternate activities (CC/AA) which "trump" the primary rotation activity. To see this detail, make sure you are in the view "By Resident (Details)" or you can also view these activities in the individual schedules tab located at the top of the master rotation schedule view.

| July | August | September | October | November | December |
|--|-----------------|---|------------------------------|---------------------------------------|------------|
| DERM | SMB | GI | SMA | ERIM^P ED-Intern | SME |
| CC/AA 7/4 (HS), 7/5 (CC), 7/6 (Mcgirt), 7/6 (Edwards), 7/7 (Edwards), 7/8 (CC), 7/12 (CC), 7/13 (Mcgirt), 7/15 (CC), 7/18 (CC), 7/19 (CC), 7/20 (Mcgirt), 7/22 (CC), 7/25 (CC), 7/26 (CC), 7/27 (Edwards), 7/27 (Mcgirt), 7/28 (Edwards), 7/29 (BLOCK) | CC/AA 8/16 (CC) | VAC 9/5, 9/15-9/16 CC/AA 9/1 (Liver), 9/6 (GI Clinic), 9/7 (CC), 9/8 (Liver), 9/8 (SYM), 9/13 (GI Clinic), 9/14 (CC), 9/20 (GI Clinic), 9/21 (CC), 9/22 (Liver), 9/23 (BLOCK), 9/27 (GI Clinic), 9/28 (CC), 9/29 (Liver) | CC/AA 10/14 (CC), 10/24 (CC) | | |

Verifying the Schedule has been Successfully Populated

After following all of the steps above and fully populating the schedule(s) with trainees, select the “Reports” tab from the MedHub portal page. Find the “Scheduling Reports” section and select the “Resident Scheduling Errors” report. This report will identify any gaps in the schedule or any overlaps of activities. If it is error-free, you have correctly assigned all trainees to an activity for their entire appointment of the academic year.



Schedule Lockout

On the 15th* of each month, program administrators will be locked out of their schedules for the month prior. Administrators will receive an e-mail 7-10 days in advance of the 15th notifying them of the schedule lock-out so they may ensure that all scheduled activities and duty hours are up-to-date. If a program administrator does need to edit previous scheduling information and is locked out, the GME Office will need to be contacted to unlock prior rotations for any revisions.

*Note: Each GME office can elect to change the date of lock-out. Please contact your GME office for details on your institutions lock out period.

Faculty Scheduling

To ensure faculty are associated to activities for evaluation matching and delivery using the “by schedule” method, the administrator must assign faculty to these activities so MedHub can make those matches when delivering evaluations. There are a couple of methods administrators can choose to ensure the faculty member is scheduled appropriately:

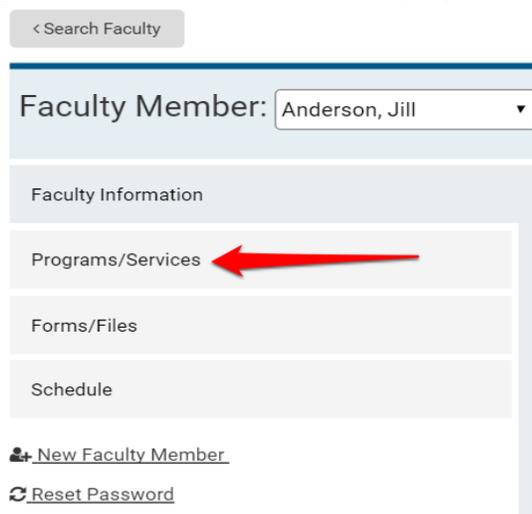
- Service Group
- Individual Services

Scheduling to a Service Group

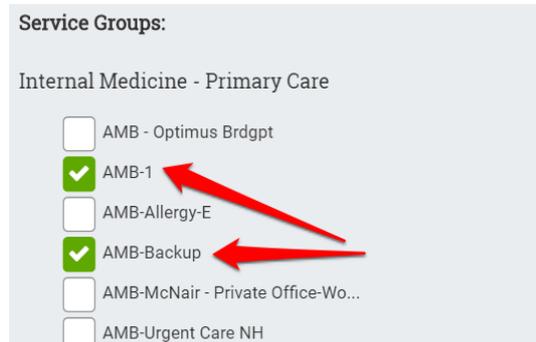
1. Select a faculty member from the faculty pull-down menu on the MedHub portal page (Home).



2. Click on the Programs/Services tab on the faculty's profile.



3. Select the services to which this faculty member is permanently assigned and therefore evaluates trainees that may rotate on to this service.



4. If the faculty member is permanently assigned to this service, to view their permanent assignment on the master rotation schedule, select Program Settings from the home page and find the option, “Display Permanent Faculty Assignments” under the Schedules tab.



This setting will show any faculty members who are permanently assigned to a particular service (i.e. service group) during the academic year on the master rotation schedule, “Services (All)” view. Faculty appear in red.

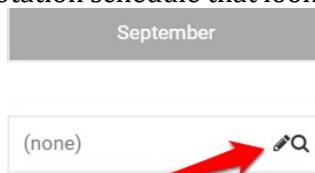
Scheduling to Individual Services

To schedule a faculty member directly to a particular service for a specified duration of time (especially if they are not permanently assigned to that service), the administrator can either schedule the faculty member into the rotation schedule or schedule him/her into a service or clinic directly from his/her faculty demographic profile.

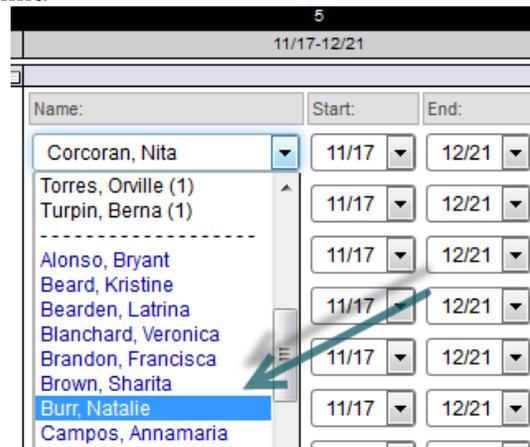
1. To schedule a faculty member directly to the master rotation schedule, select the Schedules tab in the navigation bar and select the view type, “Services (All).”



2. Select the icon in the master rotation schedule that looks like a pencil.



3. From the pull down menu, select the faculty member that will be on this particular rotation or service for a specified period of time. It may not always match the rotation block period. Faculty will appear in blue in the pull down list. Submit.



4. The faculty member will appear on the master rotation schedule “by service” for the specified period of time.

[Baird, B.](#) (10/20-10/31) 

5. The scheduled information on the master rotation schedule is also displayed on the schedule tab of the faculty member’s demographic profile.

Faculty Schedule:

| Academic Year: July 1, 2016 - June 30, 2017 ▼ | | | | |
|---|---------|--|------------|---|
| Service/Clinic Name: | Type: | Start Date: | End Date: | Actions: |
| Away-Union | Service | 10/20/2016 | 10/31/2016 | <input type="button" value="✕Modify"/> <input type="button" value="✕Delete"/> |
| <input type="button" value="+Add Service"/> | | <input type="button" value="+Add Clinic"/> | | |

Instead of scheduling the faculty member directly to the service on the master rotation schedule, the administrator can schedule the faculty member from his/her demographic profile.

1. Select a faculty member from the faculty pull-down menu on the MedHub portal page (Home).

Note: If this tab does not appear, go to “Program Settings” from the MedHub portal page and select the “Schedules” tab. Check the option, “Faculty Scheduling” and save the settings.

| | | | | |
|--|---|------------|-------------|-------------|
| General | Schedules | Procedures | Evaluations | Conferences |
| Schedule Settings | | | | |
| Email Residents Service Curriculum Objectives: | (do not email objectives) ▼ ⓘ | | | |
| Email Residents Clinic Curriculum Objectives: | (do not email objectives) ▼ ⓘ | | | |
| Deliver Curriculum Objectives: | For all assigned services ▼ ⓘ | | | |
| Faculty Scheduling: | <input checked="" type="checkbox"/> ⓘ  | | | |

2. Select the “Schedules” tab from their faculty profile.

| | |
|--|--------------|
| Faculty Information | First Name * |
| Programs/Services | Last Name * |
| Forms/Files | Suffix * |
| Schedule  | Salutation: |
| + New Faculty Member | Title: |
| Reset Password | Specialty: |

3. Select the “Add Service” or “Add Clinic” button to schedule the faculty member to the appropriate activity. Assign the service or clinic and designate the start and end dates of that particular activity. Submit.

Faculty Schedule:

Academic Year: July 1, 2016 - June 30, 2017 ▼

| Service/Clinic Name: | Type: | Start Date: | End Date: | Actions: |
|----------------------|---------|-------------|------------|-----------------|
| Away-Union | Service | 10/20/2016 | 10/31/2016 | ✕Modify ✕Delete |

Add Service ✕

Service:* Start Date:* End Date:*

NOTE: This information should not overlap Service assignments in "Programs/Services" tab (above) or team-based assignments. Otherwise, evaluations delivered using the "Schedule (Services/Teams)" method may create duplicate matches.

- The service or clinic will then be assigned to the faculty member. The information from the faculty member's scheduling tab will flow over into the master rotation schedule.

| | |
|---|--|
| Baird, B. (10/20-10/31)  | Baird, B. (11/1-11/19)  |
|---|--|

Once the administrator has scheduled the faculty into the rotation schedule, this will allow MedHub to make evaluation matches with trainees rotating into those activities.

For outside faculty to whom the program occasionally sends evaluations but does not need a MedHub profile, set them up as "outside evaluators." * If these individuals ever verify procedures, do NOT add them as outside evaluators, but create a MedHub profile for these faculty instead.

*see "Evaluation Functions" section for instructions on how to add an outside evaluator.

Program Settings

Home>Program Settings> Schedule Tab

There are a variety of program settings related to schedule tasks. In MedHub, the "?" next to the setting will open a knowledge base article on that setting if you need further information.

Program Settings

| General | Schedules | Procedures | Evaluations | Conferences | Duty Hours | Custom Alerts |
|--|---|------------|-------------|-------------|------------|---------------|
| Schedule Settings | | | | | | |
| Email Residents Service Curriculum Objectives: | 5 Day(s) before Rotation ? | | | | | |
| Email Residents Clinic Curriculum Objectives: | (do not email objectives) ? | | | | | |
| Deliver Curriculum Objectives: | For all assigned services ? | | | | | |
| Faculty Scheduling: | <input checked="" type="checkbox"/> ? | | | | | |
| Display Faculty in Weekly Activity View: | <input type="checkbox"/> | | | | | |
| Email Admin when Releasing Resident: | <input type="checkbox"/> ? | | | | | |
| Enable Team-based Functions: | <input type="checkbox"/> ? | | | | | |
| Populate Service-based Clinics/Shifts: | 7 Day(s) before Rotation ? | | | | | |
| Track Clinics for Visiting Residents: | <input type="checkbox"/> ? | | | | | |
| Track Clinics (individual) for Faculty: | <input checked="" type="checkbox"/> ? | | | | | |
| Schedule Interfaces | | | | | | |
| Enable Amion Interface: | <input checked="" type="checkbox"/> yaleane ? Add Amion Interface | | | | | |
| Enable OpenTempo Interface: | <input type="checkbox"/> (site) (user login) (api key) ? | | | | | |
| Enable QGenda Interface: | (company key) ? | | | | | |
| Enable ShiftAdmin Interface: | <input type="checkbox"/> (validation key) ? | | | | | |
| Enable SpinFusion Interface: | <input type="checkbox"/> (authentication key) ? | | | | | |
| Resident Absences | | | | | | |
| Allow Residents to Request Absences: | <input checked="" type="checkbox"/> ? | | | | | |
| Notify Residents of Approved Absences: | <input type="checkbox"/> | | | | | |
| Block Dates for Vacations/Away Conferences: | <input type="checkbox"/> ? | | | | | |
| Absence Approval - Remove Holidays/Weekends: | <input type="checkbox"/> | | | | | |
| Hide Sick Days from Resident/Faculty View: | <input type="checkbox"/> | | | | | |
| Display resident absences in 'by service' rotation view: | <input type="checkbox"/> | | | | | |
| Rotation Schedules | | | | | | |
| Resident PGYs: | 0, 1, 2, 3, 4, 5, 6, 7, 8, 9 | | | | | |
| Schedule Name:* | ANES | | | | | |
| Default Schedule View:* | By Resident ? | | | | | |
| Resident Ordering:* | By PGY, then Last Name ? | | | | | |
| Schedule Display Options:* | <small>(By Resident' views only)</small> <input type="checkbox"/> Hide Trainee Levels <input type="checkbox"/> Display Incoming Residents at Bottom of Schedule <small>(By Resident' views only)</small> <input type="checkbox"/> Display Permanent Faculty Assignments <small>(Service - All User' view only)</small> <input type="checkbox"/> Repeat Rotation Period Header ? | | | | | |
| Public View of Rotation Schedule | | | | | | |
| Enable Public View:* | <input type="checkbox"/> ? https://preview.medhub.com/functions/schedule/ https://preview.medhub.com/functions/schedule/index.mh?e=anes (program-specific) | | | | | |
| | <input checked="" type="checkbox"/> Display absence type on public schedule ? | | | | | |
| Please contact MedHub Support if you need to divide your rotation schedules differently by PGY | | | | | | |
| Save Settings | | | | | | |

Duty Hours

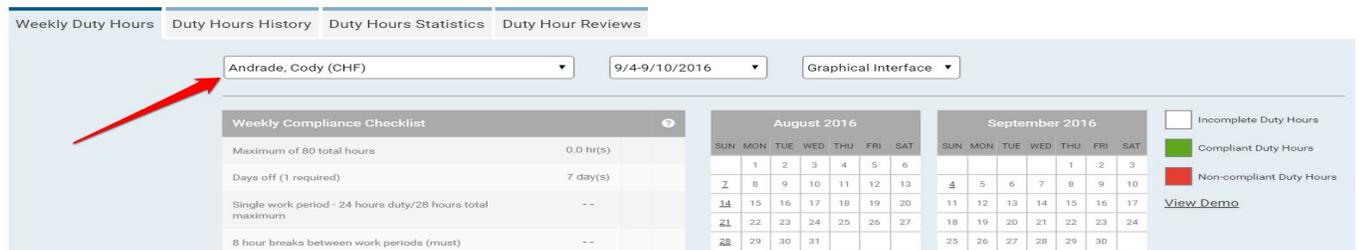
Programs are expected to monitor trainees' duty hours to ensure they comply with ACGME duty hour requirements. To ensure that trainees are in compliance, MedHub provides functionality to assist programs in monitoring and reporting duty hour submissions.

Program Administrators have the capability to view and edit duty hour submissions completed by the trainee. To review duty hour submissions, locate the "Resident Duty Hours" link located on the MedHub portal page (Home).

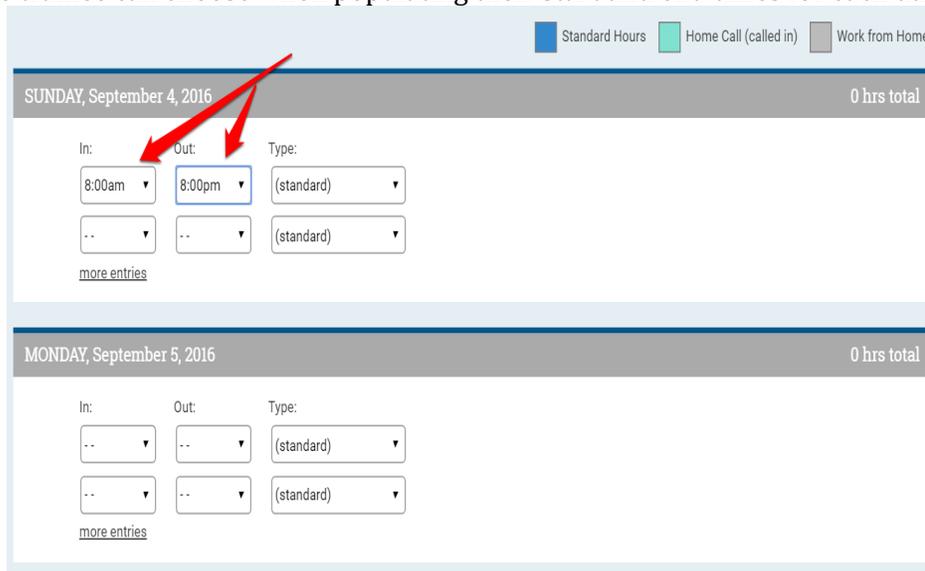


The initial view will display a timesheet of the first trainee located in the drop down along with the current week in the top right hand corner. To review a prior week's timesheet of a particular trainee, locate the trainee's name from the drop down and the week.

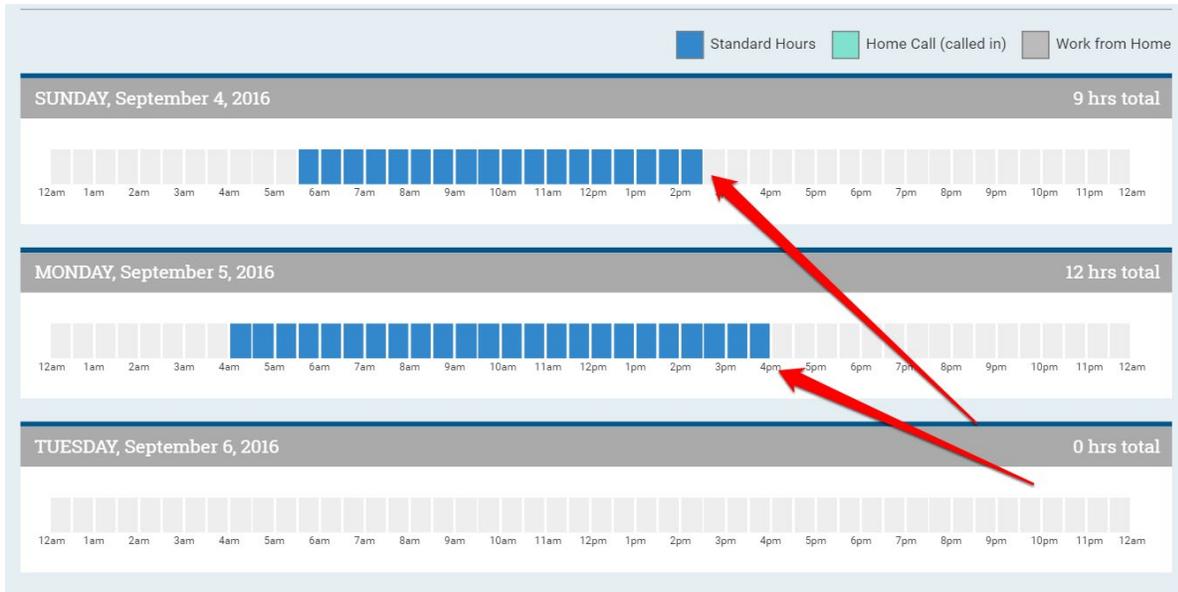
Weekly Duty Hours



The weekly submission of that trainee will appear so the administrator can review how the trainee submitted his/her hours, especially if any violations occurred during that particular week. Please note that there are 2 types of duty hour views: a standard interface or a graphical interface. The standard interface is a set of drop down options that the trainee can choose when populating their start and end times for each day.



The graphical interface allows the trainee to select the start and end times directly rather than through a drop down.



To switch views, locate the link, "Use Standard Interface" or "Use Graphical Interface" on the timesheet.



On the top of the timesheet is a weekly compliance checklist that lists the basic duty hour rules that are tracked in MedHub. If a trainee is in compliance after submitting his/her weekly timesheet, each duty hour rule will be checked off in green.

| Weekly Compliance Checklist | | |
|---|------------|---|
| Maximum of 80 total hours | 46.0 hr(s) | ✓ |
| Days off (1 required) | 2 day(s) | ✓ |
| Single work period - 24 hours duty/28 hours total maximum | -- | ✓ |
| 8 hour breaks between work periods (must) | -- | ✓ |
| 10 hour breaks between work periods (should) | -- | ✓ |

Note: you must submit your duty hours to check for compliance issues
Last Modified by Super Admin on 9/7/2016 at 2:30pm

If a trainee is not in compliance with the duty hour rules, the duty hour rule that is violated or potentially violated will show up with a red "x" and the week on the calendar will be shaded in red.

| Weekly Compliance Checklist | | | August 2016 | | | | | | | September 2016 | | | | | | |
|--|------------|---|---|-----|-----|-----|-----|-----|-----|----------------|-----|-----|-----|-----|-----|-----|
| Maximum of 80 total hours | 78.0 hr(s) | ✓ | SUN | MON | TUE | WED | THU | FRI | SAT | SUN | MON | TUE | WED | THU | FRI | SAT |
| Days off (1 required) | 1 day(s) | ✓ | 1 | 2 | 3 | 4 | 5 | 6 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | |
| Single work period - 24 hours duty/28 hours total maximum | -- | ✗ | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 11 | 12 | 13 | 14 | 15 | 16 | 17 |
| 8 hour breaks between work periods (must) | -- | ✓ | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 18 | 19 | 20 | 21 | 22 | 23 | 24 |
| 10 hour breaks between work periods (should) | -- | ✓ | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 25 | 26 | 27 | 28 | 29 | 30 | |
| Note: you must submit your duty hours to check for compliance issues Last Modified by Super Admin on 9/7/2016 at 2:31pm | | | <div style="display: flex; justify-content: space-between;"> Legend: □ Incomplete Duty Hours ■ Compliant Duty Hours ■ Non-compliant Duty Hours </div> | | | | | | | | | | | | | |

Reason for non-compliance: Continuity of Care - Work load

When a trainee submits his/her timesheet and a violation is present, the trainee will be forced to submit an explanation of non-compliance which will be indicated at the bottom of the weekly compliance checklist. Please note that MedHub is a proactive system. This means that for those duty hour rules that are averaged over 4 weeks (i.e. 80 hours, 1 day off in 7) will appear as a violation for that given week even though when the program runs their 4 week or monthly duty hour reports, most likely the violation will not appear. The potential violation gives the program a warning and something to consider when reviewing duty hour submissions. It does not mean that the trainee violated those particular duty hour rules, but to provide the program information that a true violation could occur if not monitored. Trainees will still be asked to submit an explanation for those duty hours that are potentially violated for a given week.

Trainees only have 2 weeks to document their duty hours, the current week and the prior week. Anything before the prior week is locked to the trainee. There is not a way to “unlock” prior timesheets for trainees to complete. If a trainee does not complete his/her duty hours for the prior week, he/she will receive an e-mail along with an urgent task on their home page regarding incomplete duty hours. Since there is no “unlock” for trainees, the program administrator can log those hours on behalf of that trainee, if necessary.

Program Administrators have the ability to review various duty hour information and reports. To review historical duty hour submissions, select the “Duty Hours History” tab. This provides a quick analysis of duty hour submissions over the rolling year.

| Dates: | Hours: | Calendar Days Off: | Absences: | Compliance (Reason): | Program Notes: |
|----------------|--------|--------------------|-----------|---|----------------|
| 1/1 - 1/2/16 | 0.0 | -- | 0 | -- | -- |
| 1/3 - 1/9/16 | 0.0 | -- | 0 | -- | -- |
| 1/10 - 1/16/16 | 0.0 | -- | 0 | -- | -- |
| 1/17 - 1/23/16 | 0.0 | -- | 0 | -- | -- |
| 1/24 - 1/30/16 | 0.0 | -- | 0 | -- | -- |
| 1/31 - 2/6/16 | 0.0 | -- | 0 | -- | -- |
| 2/7 - 2/13/16 | 111.5 | 1 | 0 | X Continuity of Care - Maximum of 80 total hours: 111.5 hrs Single work period of 16 hours exceeded No 10 hour break between work periods | -- |
| 2/14 - 2/20/16 | 0.0 | -- | 0 | -- | -- |

To run duty hour statistical reports, select the “Duty Hour Statistics” tab to choose particular statistics to get various components of information the program may need.

Duty Hours Statistics

Use this section to calculate duty hour statistics. These results can be used to answer some com

Statistic: Identify maximum work periods over date range

- Identify maximum work periods over date range
- Identify maximum work periods per service over date range*
- Average duty hours per week (excluding home call)
- Average days per week of in-house call (excluding home call and night float)
- Residents scheduled to more than 60 hours of in-program shifts (EM)
- Residents scheduled for more than 6 consecutive nights of Night Float*

Date Range*:

* Date range can not cross academic years for the “Work Periods per Service” statistics report.
 * Night Float is defined as any call/shift that contains “Float” in the name and crosses midnight.

To review duty hour submissions that have violations, select the “Duty Hour Reviews” tab. The administrator can review the violation and make any comments about the violation that occurred. However, only the Program Director can check off that the duty hour violation was reviewed; comments made by the administrator do not indicate that the duty hour review was completed, but only partially completed. The Program Director has final sign-off.

Review Period

Weekly Duty Hours | Duty Hours History | Duty Hours Statistics | **Duty Hour Reviews**

Program: Pediatric Critical Care Medicine
 Schedule: CCP
 Review Period: 7/11/2016 - 8/7/2016
 Submission Rate: 100.00%

Resident Violations

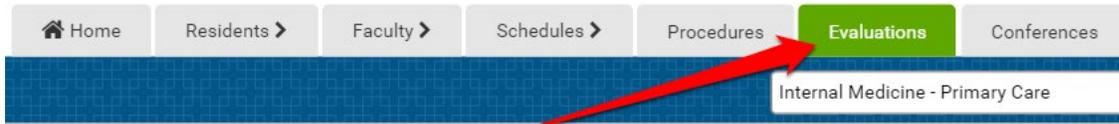
| Resident | Level | Violations | | | | | Services | Resident Notes | Review Comments |
|------------------------|-------|------------|--------------|---|------------|---|--|--|--------------------------|
| | | AVG Hours | AVG Days Off | 16/24+4 Max | 10 hr Rest | | | | |
| [Name] | 4 | 0 (66.9) | 0 (1.8) | 1 | | 0 | 7/11-7/27 Pediatric Critical Care Unit 7/28-7/31 CHOP Boot Camp 8/1-8/7 Pediatric Critical Care Unit | 7/17: Conference - Single work period of 29 hours - went to an educational conference. Maximum of 80 total hours - will average out over 4 weeks. | Reviewed - will monitor. |

Show all residents Additional Comments Update

Programs can run multiple duty hours reports under the Reports tab, however, MedHub recommends that programs run the Duty Hour Compliance Report to get accurate reporting results since this report takes into consideration the averages of certain duty hour rules. This report should assist programs in making determinations about true violations that occurred over a given period of time.

Evaluation Creation and Management

From the MedHub portal page (Home), select the “Evaluations” button located on the top navigation menu.



There are two major components to evaluation functionality:

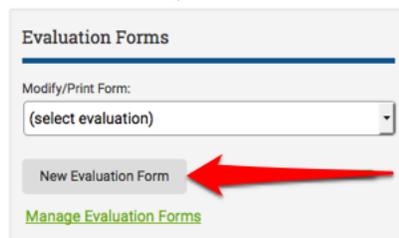
1. Evaluation creation (non-milestone and milestone)
2. Evaluation delivery

Creating a Non-Milestone Evaluation

Administrators have multiple options for creating a new evaluation form:

- Designing a new form
- Copying an existing form (once you already have a form created) – You’ll use this option if an existing form is locked and has been delivered, but it should either no longer be used or it needs to be modified.
- Copying an existing form from other program within your institution (this is available if another program has agreed to share their evaluation with other programs).
- Copy an existing form from another MedHub client (this is available if another program at another MedHub client institution has agreed to share their evaluations with other MedHub clients).

1. From the Evaluations tab, select the “New Evaluation Form” button.



2. To design a new draft evaluation form, select the “Design New Form” tab.

New Form - Design New Form



Use this option to start a new evaluation from scratch. If you already have an electronic version of this form, you may be able to copy and paste sections of text.

Title:*

Introduction/
Instructions:

3. Provide a name for the form (i.e. Resident Evaluation of Attending)
4. Enter any introduction or instructions about the evaluation (optional)
5. Select the type of evaluation (i.e. resident evaluation of faculty, faculty evaluation of resident, etc.). This determines who the form can be delivered to and who can be evaluated with the form.
6. Choose to make this public to other programs within your institution (optional)
7. Select “Create Evaluation Form” button to start designing the evaluation form template

New Form - Design New Form

Design New Form Copy Existing Form Copy from another Program Copy from another Institution

Use this option to start a new evaluation from scratch. If you already have an electronic version of this form, you may be able to copy and paste sections of text.

Title:*

Introduction/Instructions:

Types:* Resident evaluation of other resident (peer) Faculty self evaluation
 Resident evaluation of faculty member Faculty evaluation of a service/clinic
 Resident evaluation of student Faculty evaluation of program/hospital
 Resident evaluation of staff Resident/Student/Faculty evaluation of a procedure
 Resident self evaluation Resident/Student/Faculty evaluation of a conference
 Resident evaluation of a service/clinic Patient/staff evaluation of resident
 Resident evaluation of program/hospital Patient/staff evaluation of faculty/program/hospital
 Faculty evaluation of a resident Student evaluation of resident
 Faculty evaluation of a student Student evaluation of faculty
 Faculty evaluation of other faculty (peer)

Format:*

Descriptions:* Numbering:*

- If applicable to the evaluation, select the "Add Header" button to create headers above either a question or a series of questions. Provide a header name (i.e. Medical Knowledge, Patient Care, Practice Based Learning, etc.), add an introduction if applicable, and select "Submit." This will add a header to your evaluation template. Note: headers are not required.

Questions/Headers

| Order: | Type: | Question/Header: | Answer Type: | Competencies/Milestones: | Alerts/Comments: |
|--------|--------|------------------|--------------|--------------------------|------------------|
| 1. | Header | Professionalism | | | -- |

- To add a question or a series of questions under your header, select the "Add Question" button.

| Order: | Type: | Question/Header: | Ans |
|--------|--------|------------------|-----|
| 1. | Header | Professionalism | -- |

10. Enter the evaluation question.

Modify Questions

Question:* 

11. Select the appropriate answer type for the question from the pull down menu. To review all answer types, click on the “view all answer types” link found under the pull down menu. If the scale that is needed is not available, log a support ticket in MedHub from the “Help” tab located in the top navigation menu that describes the type of evaluation scale needed. (The number that appears in parentheses with the evaluation scale type indicates how many options or choices are in that scale.)

Answer Type:* 
[\[view all answer types \]](#)

12. Determine if the question should be required (is a response required by the individual completing the evaluation?) and/or confidential (should the evaluator/evaluatee be able to see responses to this completed form?).

Required:  Confidential: 

13. Tag the evaluation question to a competency (optional) and select “Submit.”

Competencies: Patient Care Practice-based Learning and Improvement
 Medical Knowledge Professionalism
 Systems-based Practice Interpersonal Communication Skills (ICS)

14. After submission, return to the evaluation template. The question will be listed under the header. The administrator can continue to add other questions by selecting the “Add Question” button.

| Order: | Type: | Question/Header: | Answer Type: | Competencies/Milestones: | Alerts/Comments: |
|--------|---|------------------|---|---|-------------------------------|
| 1. |  | Header | Professionalism | -- | -- |
| 2. |  | Question | Develops and implements effective treatment plans.[C] | Scale: Below Expectations to Exceeds Expectations Scale Descriptions | Competencies: PC No |

15. To add low score alerts and required comments, select the gray “No” under the Alerts/Comments column. This will allow the program (Program Director, Program Administrator, faculty mentor) to receive low score alerts via email and/or require the evaluator to comment if he/she gives the evaluatee a low score on a particular question.

| Order: | Type: | Question/Header: | Answer Type: | Competencies/Milestones: | Alerts/Comments: |
|--------|---|------------------|---|---|---|
| 1. |  | Header | Professionalism | -- | -- |
| 2. |  | Question | Develops and implements effective treatment plans.[C] | Scale: Below Expectations to Exceeds Expectations Scale Descriptions | Competencies: PC No  |

16. For scaled questions, the administrator can either define the low score alerts based on the individual PGY level or overall. If the administrator chooses to define low score alerts by PGY level, select the “Set Alerts by PGY Level” button.

Alerts/Comments

Evaluation Form: **Resident Evaluation of Attending**
 Question: **Develops and implements effective treatment plans.**

Set Alerts By Level:



By PGY level, select the scores (i.e. options) an evaluator would have to select to be considered a low score. The administrator can also indicate comments are required based on the option chosen. For example, if an evaluator, who is evaluating a PGY 1 resident, selects option 1 or 2 for this question, this will require a comment by the evaluator and the program will receive a low score alert.

The administrator can also mimic these same alerts for all questions that use this same scale if the option “propagate these selections through all questions of this answer type” is selected.

Set Alerts by Level

| Level: | Send Alerts On: | | | | | | | | | Require Comments On: | | | | | | | | |
|---------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
| Non-Residents | <input type="checkbox"/> |
| Level-0 | <input type="checkbox"/> |
| Level-1 | <input type="checkbox"/> |
| Level-2 | <input type="checkbox"/> |
| Level-3 | <input type="checkbox"/> |
| Level-4 | <input type="checkbox"/> |
| Level-5 | <input type="checkbox"/> |
| Level-6 | <input type="checkbox"/> |
| Level-7 | <input type="checkbox"/> |
| Level-8 | <input type="checkbox"/> |
| Level-9 | <input type="checkbox"/> |
| Level-10 | <input type="checkbox"/> |

Propagate these selections through all questions of this answer type

If the administrator chooses to set alerts overall regardless of PGY level, select the scale option that should generate a low score alert and identify if comments should be required if a particular low score is given to the evaluatee. Select “Submit.”

Evaluation Form: **Resident Evaluation of Attending**
 Question: **Develops and implements effective treatment plans.**

Set Alerts By Level:

Send Alert On: 1 2 3 4 5 6 7 8 9

Require Comments On: 1 2 3 4 5 6 7 8 9

Options: Propagate these alerts/comments through all questions of this answer type

- “Send Alert On” generates an alert via email on any evaluatee receiving the specified score on a completed evaluation.
- “Require Comments On” forces the evaluator to provide a comment for providing the low score.

17. If the administrator wants to preview the evaluation as the form is being built, select the “Preview Evaluation” link found to the right of the name/title of the evaluation form. This is what the evaluator will see.

New Evaluation form
[Insufficient contact to evaluate](#) (delete evaluation)
 New Evaluation form

Patient Care

| Below Expectations | | | Meets Expectations | | | Exceeds Expectations | | |
|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
| <input type="radio"/> |

1. Develops and implements effective treatment plans.*

18. Once the evaluation has been completed, the administrator will want to ensure that the evaluation form is locked and no longer in draft mode. The form needs to be final in order for it to be delivered. Once the evaluation is finalized AND has been delivered to evaluators, the evaluation questions can no longer be edited or added.

Design:*
 Formatting:*

Setting Up Milestones or Subcompetencies (for Evaluations)

In light of the Next Accreditation System (NAS), MedHub has provided the ability for programs to create milestone evaluations that emulate each program's ACGME Residency Review Committee's (RRC) approved reporting milestones or subcompetencies as defined by each program's milestone projects. Before a milestone evaluation can be created, there are some initial prerequisite steps.

1. **Enabling Milestones** – to enable the individual training program's milestones or subcompetencies, from the portal page select the Program Settings link under the Site Management section, and then select the Evaluations tab.

Locate the option, "Enable Milestones" and select the checkbox. Save settings.

Enable Milestones: 

Once the milestones have been enabled, return to the home page where a new link will appear under the Site Management section: **Milestone Management**.



2. **Importing Milestones Package** – for the milestones (or subcompetencies) to become a part of the evaluations, the administrator will need to import the ACGME RRC's approved subcompetencies. Select the "Milestone Management" link and the Subcompetencies tab. Next, choose the "Import/Update Subcompetencies."

Subcompetencies | Milestones Summary | Milestone Settings

Glaucoma Subcompetencies

| Competency: | ID: | Subcompetency: | Status: | Linked EPAs: | Linked Elements: | Tagged Questions: | Actions: |
|-------------|-----|----------------|---------|--------------|------------------|-------------------|----------|
| (none) | | | | | | | |

Choose the subcompetency package that is specific to your training program and select the "Import Package" button. Usually, this package will be marked as "RECOMMENDED". Before the administrator decides to import, he/she can also preview the program's subcompetency package to review the ACGME approved milestones.

Packages Available for Import

| Package: | Last Updated: | Items: | Actions: |
|---|---------------|--------|--|
| AAOMS Oral and Maxillofacial Surgery Added 6/17/2016 | 6/17/2016 | 32 | <input type="button" value="Import Package"/> <input type="button" value="Preview"/> |
| Abdominal Radiology Updated by ACGME 02/2014. Updated by MedHub 02/2014. | 2/27/2014 | 13 | <input type="button" value="Import Package"/> <input type="button" value="Preview"/> |
| ABMGG Clinical Molecular and Cytogenetics Milestones Created on 3/25/2016 - BG | 3/25/2016 | 12 | <input type="button" value="Import Package"/> <input type="button" value="Preview"/> |

Once imported, all of the program’s subcompetencies will be listed. The list will provide not only the subcompetencies, but will eventually show the program which milestones or subcompetencies are tagged to evaluation questions as well as which are linked to Entrustable Professional Activities (EPAs) and/or Milestone Elements (if enabled).

| Internal Medicine Subcompetencies | | | | | | | |
|-----------------------------------|------|--|---------|--------------|------------------|-------------------|----------|
| Competency: | ID: | Subcompetency: | Status: | Linked EPAs: | Linked Elements: | Tagged Questions: | Actions: |
| Patient Care | PC-1 | Gathers and synthesizes essential and accurate information to define each patient’s clinical problem(s). | Active | 0 | 0 | 380 | |
| | PC-2 | Develops and achieves comprehensive management plan for each patient. | Active | 0 | 0 | 265 | |

The administrator has the ability to modify these milestones or subcompetencies if needed. Select the “modify” button next to the subcompetency. Here the administrator can edit the subcompetency and make it inactive if it will no longer be used to measure achievements. The administrator can also establish milestone goal lines for each milestone that reflects the progression of each trainee across PGY levels. RECOMMEND: Discuss with the Program Director the milestone goal line start and end points as well as values assigned between these start and end points. These goals lines will appear on milestone trend graphics and charts.

Milestones - Subcompetencies - Modify Subcompetency

Subcompetency Information

Competency:

ID/Abbrev*:

Subcompetency*:

Status:

Goal Lines

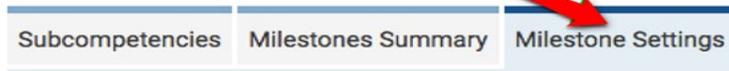
Goal Line Start Point: PGY: Value:

Goal Line End Point: PGY: Value:

Propagate these goals across all milestones

3. Milestone Settings – Return to the main milestones management page and select the “Milestone Settings” tab.

Milestone Settings



The settings allow the administrator to decide if the program wants to also track the program’s EPAs, milestone elements, as well as milestone achievements. The administrator can also enable the option to track the milestone elements by choosing to link directly to the subcompetency or to the competency level of a particular subcompetency. RECOMMEND: Discuss these options with the Program Director if the program chooses to track.



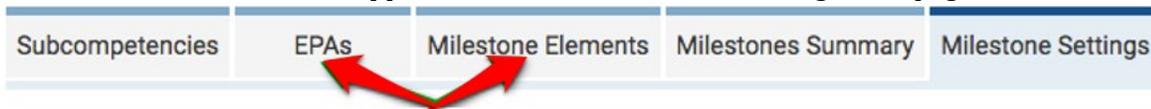
Use this page to update the milestone settings for your program. Most programs should not use the 'Inherit Milestone' with any questions.

Track Entrustable Professional Activities (EPAs):

Track Milestone Elements: Link to milestones/level

Track Milestone Achievements: Link to milestones/level
Link to milestones (top-level only)

Once enabled, new tabs will appear on the main milestones management page.



Each of these tabs will allow the administrator to import EPA and milestone element packages if the program chooses to track these items as well. The milestone achievement option is found under the Milestones Summary tab which allows the programs to manually indicate when each trainee has achieved each subcompetency by checking the checkbox in the right column of each subcompetency.

View Type: Milestones List Milestones Trends Milestones Summary List to Display: Subcompetencies

Subcompetency Achievements (0 / 22)

| Competency: | ID: | Subcompetency: | PAST 6 MONTH STATISTICS | | | Date: | Reviewed By: | Achieved |
|--------------|------|--|-------------------------|--------|--------------|-------|--------------|--------------------------|
| | | | Average: | Range: | # Questions: | | | |
| Patient Care | PC-1 | Gathers and synthesizes essential and accurate information to define each patient's clinical problem(s). | -- | -- | 0 | -- | -- | <input type="checkbox"/> |
| | PC-2 | Develops and achieves comprehensive management plan for each patient. | -- | -- | 0 | -- | -- | <input type="checkbox"/> |

Other milestone settings include:

- Enable Progress Reports (useful for adding this data to ACGME’s WebADS),
- Defining a default milestone scale (REQUIRED),
- Indicating which types of evaluations should be included in calculating milestone averages, and
- Defining the PGY levels to track for milestones.

Enable Progress Reports: ?

Inherit Milestones from Program(s):

(none) ?

(none)

(none)

Default Subcompetency Scale: Scale: Milestones - Level 1-5 (w/ NA)

Evaluation Types to Include in Averages: (at least one required)

Resident evaluation of other resident (peer)

Faculty evaluation of a resident

Patient/staff evaluation of resident

Resident/Student/Faculty evaluation of a procedure

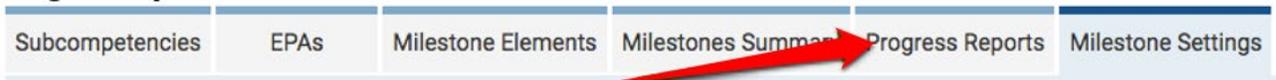
Resident/Student/Faculty evaluation of a conference

Start: End:

PGYs to Track for Milestones: 1 3

[Save Settings](#)

Enable Progress Reports – if this is enabled, a new tab will appear on the main milestones page titled, “Progress Reports.”



This is the information programs can use for ACGME WebADS purposes. The progress report will provide a 6-month average based on the evaluation types chosen under milestone settings. The program will be able to view the average score of that subcompetency, the range of scores for that subcompetency and how many evaluation questions are tagged to that subcompetency. This average will then serve as a guideline for the Clinical Competency Committee (CCC) to determine which level the trainee performs at for that specific 6-month reporting period.

6-Month Progress Reports

Subcompetencies EPAs Milestone Elements Milestones Summary Progress Reports Milestone Settings

Resident: Date Period: Jan-Jun 2016

[Export Progress Report](#)

Internal Medicine Milestones

| ID: | Subcompetency: | MILESTONE LEVELS | | | | | 6 MONTH SUMMARY | | |
|------|---|------------------------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------|--------|--------------|
| | | Level 1 | Level 2 | Level 3 | Level 4 | Level 5 | Average: | Range: | # Questions: |
| PC-1 | Gathers and synthesizes essential and accurate information to define each patients clinical problem(s). | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | | | 0 |
| | | + MORE INFORMATION | | | | | | | |
| PC-2 | Develops and achieves comprehensive management plan for each patient. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | | | 0 |
| | | + MORE INFORMATION | | | | | | | |

Default Milestones Scale – It is recommended to choose a default milestone scale that will be used for the progress report. It is recommended to use the same milestone scale as indicated in the ACGME milestone project for each training program. To see what the scale looks like, select the magnifying glass icon next to the scale pull-down.

Default Subcompetency Scale: Scale: Milestones - Level 1-5 (w/ NA)

PGY Levels to Track for Milestones – The program has the ability to track milestones or subcompetencies across the PGY levels.

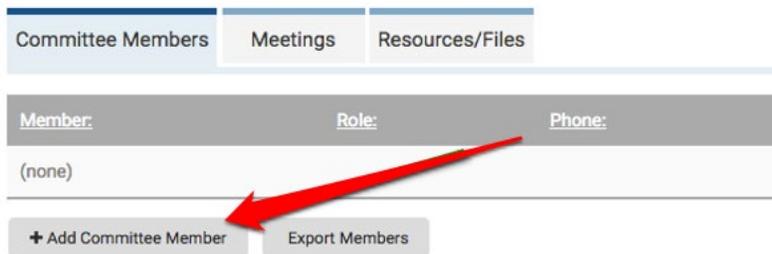
Clinical Competency Committee (CCC)

Since programs are required to appoint a Clinical Competency Committee (CCC) for resident evaluation purposes, each program has the ability to add members to their CCC in order to evaluate trainees.

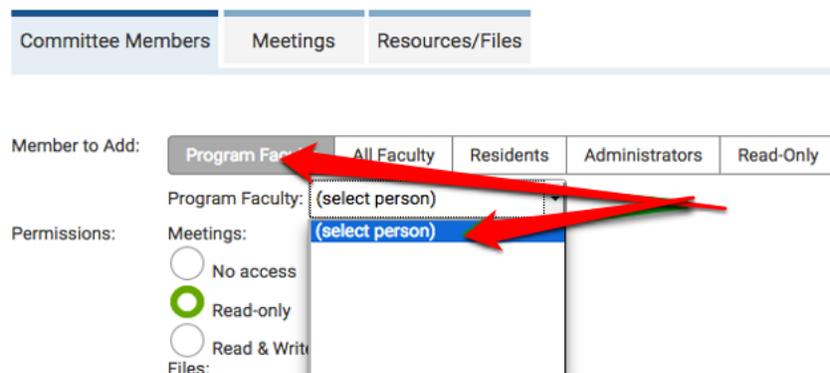
To set up the CCC, from the home page, select the “Clinical Competency Committee” link found under the Security section.



1. Click the “Add Committee Member” button to add faculty or resident members.



2. The administrator can choose members either from program faculty (i.e. faculty only within that program), all faculty (faculty from the entire institution), residents (only in that program), administrators (only in that program) and any read-only users (only in that program).



- The administrator can then apply permissions to each committee member as well as indicate the leader of the CCC. The permissions allow a committee member to either receive no information (or have no access), have read-only access, or have both read and write access. For example, the leader of the CCC may want to have read and write access to the Progress Report, but the administrator may want to restrict all file access to a resident who is part of the CCC.

Clinical Competency Committee - Committee Member:

- Once each member is added, click the submit button to return to the list of CCC members. Each CCC member will now have a link on their home page labeled, "Clinical Competency Committee." This link will provide each member information pertaining to the CCC such as meetings and progress report information. Those members who have read and write access will only be able to modify information pertaining to meetings, files and progress reports. Resident members do NOT have access to milestone or progress report information of trainees.

| Member: | Role: |
|--|------------|
| Redd(Faculty), Tina (Leader) | Member |
| Redd(Resident), Tina | Non-Member |

Those faculty with read and/or write access to Progress Reports will see additional tabs:

- Milestone Summary
- Milestone Progress Reports

Clinical Competency Committee - Committee Members

| Member: | Role: | Phone: | Email: |
|------------------------------|------------|--------|-----------------|
| Redd(Faculty), Tina (Leader) | Member | -- | tina@medhub.com |
| Redd(Resident), Tina | Non-Member | -- | tina@medhub.com |

The milestone summary tab allows the CCC member to see milestone trends and milestone graphics for each trainee in comparison with his/her peers along with the view of the progress report by trainee to determine at what level is the trainee performing for 6-month reporting purposes to ACGME.

5. To add a meeting to the CCC, select the Meetings tab and then the “Add Meeting” button.

Clinical Competency Committee - Meetings

| Date: | Time: | Meeting: |
|--------|-------|----------|
| (none) | | |

[+ Add Meeting](#) [Show All Meetings](#)

6. Document information about the meeting and submit.

Clinical Competency Committee - Meetings

| Committee Members | Meetings | Resources/Files |
|-------------------|----------|-----------------|
|-------------------|----------|-----------------|

Meeting Title*:

Date/Time*:  (unknown)

(MM/DD/YYYY)

Status:

Location:

Agenda:

[Submit](#)

This meeting information will also appear for the CCC members. The meeting tab also lists all of the meetings that have occurred.

7. To add meeting minutes or any other documents necessary for the CCC members to view, select the Resources/File tab and then the “Upload File,” “Add Internet Link,” or “Add Folder” button.

Clinical Competency Committee - Meetings

| Committee Members | Meetings | Resources/Files |
|-------------------|----------|-----------------|
|-------------------|----------|-----------------|

| Date: | Time: | Meeting: |
|--------|-------|----------|
| (none) | | |

[+ Add Meeting](#) [Show All Meetings](#)

Any information uploaded here will also appear for the CCC members.

Creating Milestone Evaluations

1. Return to the evaluation tab from the home page and select the “New Evaluation Form” button. Create the initial information regarding the form by giving it a title, introduction (if needed) and selecting the evaluation type (i.e. faculty evaluation of a resident).

New Form - Design New Form

Design New Form | Copy Existing Form | Copy from another Program | Copy from another Institution

Use this option to start a new evaluation from scratch. If you already have an electronic version of this form, you may be able to copy and paste sections of text.

Title:* Milestone Evaluation

Introduction/Instructions:

Types:* (one required)

- Resident evaluation of other resident (peer)
- Resident evaluation of faculty member
- Resident evaluation of student
- Resident evaluation of staff
- Resident self evaluation
- Resident evaluation of a service/clinic
- Resident evaluation of program/hospital
- Faculty evaluation of a resident
- Faculty evaluation of a student
- Faculty evaluation of other faculty (peer)
- Faculty self evaluation
- Faculty evaluation of a service/clinic
- Faculty evaluation of program/hospital
- Resident/Student/Faculty evaluation of a procedure
- Resident/Student/Faculty evaluation of a conference
- Patient/staff evaluation of resident
- Patient/staff evaluation of faculty/program/hospital
- Student evaluation of resident
- Student evaluation of faculty

Format:* Standard

Descriptions:* Beneath option | Numbering:* Autonumber

Create Evaluation Form

2. Add questions to the form much like a standard, non-milestone evaluation form. However, when adding a question to a milestone evaluation form, the administrator **MUST** select a milestone scale. Milestones scales have titles that begin with “Scale: Milestones - ...” The question must also be tagged to a subcompetency.

Add Question

Question:* Milestone Question #3

Answer Type:* - Scale: Milestones - Level 1-5 (9)

Required:

Subcompetencies: Select ID | Subcompetency:

- Gathers and synthesizes essential and accurate information to define each patient's clinical problem(s).
- PC-2 Develops and achieves comprehensive management plan for each patient.
- PC-3 Manages patients with progressive responsibility and independence.
- PC-4 Skill in performing procedures.
- PC-5 Requests and provides consultative care.

This will be the only way the averages are calculated appropriately for progress reporting and accuracy of evaluation averages for each subcompetency. By selecting a milestone evaluation scale, the ACGME's approved level or header descriptions will be added to the evaluation automatically without adding them manually.

- After tagging the question to a subcompetency and submitting, the administrator will receive a message asking if the defined header descriptors can be added.

i Milestone Header Descriptions Available

The milestone tagged to this question has default header descriptions defined. Add these header descriptions to this question?

[Yes](#) [No](#)



Selecting “Yes” will automatically add those descriptions that are listed under each competency level into the evaluation form. To view the scale descriptions, the administrator can either select the “Scale Descriptions” link under the milestone evaluation scale.

Questions/Headers

| Order: | Type: | Question/Header: | Answer Type: | Competencies/Milestones: | Alerts/Comments: | |
|--------|-------|------------------|---------------------------------------|-------------------------------|-----------------------|--------------------|
| 1. | + | Question | Milestone Question #3 | Scale: Milestones - Level 1-5 | Subcompetencies: PC-1 | No |
| | | | Scale Descriptions | | | |



The descriptors automatically populate the header fields.

Question: Milestone Question #3

Header - Level 1: |Does not collect accurate historical data|Does not use physical exam to confirm history|Relies exclusively on documentation of others to generate own database or differential diagnosis|Fails to recognize patient's central clinical problems|Fails to recognize potentially life threatening problems

Header - Level 2: |Inconsistently able to acquire accurate historical information in an organized fashion|Does not perform an appropriately thorough physical exam or misses key physical exam findings|Does not seek or is overly reliant on secondary data|Inconsistently recognizes patients' central clinical problem or develops limited differential diagnoses

Header - Level 3: |Consistently acquires accurate and relevant histories from patients|Seeks and obtains data from secondary sources when needed|Consistently performs accurate and appropriately thorough physical exams|Uses collected data to define a patient's central clinical problem(s)

The administrator can also view these same descriptors in the preview evaluation as well. This way, the administrator will not have to add these descriptors manually.

| Level 1 | Level 2 | Level 3 | Level 4 | Level 5 |
|--|--|---|--|---|
| <ul style="list-style-type: none"> Demonstrates an understanding of common non-reproductive medical disorders | <ul style="list-style-type: none"> Performs history and physical, forms a differential diagnosis, and evaluates for common non-reproductive medical disorders (e.g., chronic hypertension, obesity, depression) | <ul style="list-style-type: none"> Interprets test results and screens for related conditions of non-reproductive medical disorders (e.g., metabolic syndrome, BRCA mutation, eating disorders) Initiates management for common non-reproductive disorders (e.g., hypertension, diabetes) | <ul style="list-style-type: none"> Initiates management plans for patients with complex non-reproductive medical disorders (e.g., osteoporosis, metabolic syndrome, BRCA mutation, eating disorders, human immunodeficiency virus [HIV] infection) and provides referrals | <ul style="list-style-type: none"> Provides on-going, comprehensive care for patients with complex and atypical non-reproductive medical disorders |

3. Milestone Question #3

4. (OPTIONAL) MedHub does provide programs the ability to batch add milestone questions by selecting the “Batch Add the Milestone Questions” button from the bottom of the evaluation form template. This button does not appear if you have not enabled milestones in Program Settings.

| Order: | Type: | Question/Header: | Answer Type: | Competencies/Milestones: |
|--------|-------|------------------|-----------------------|---|
| 1. | + | Question | Milestone Question #3 | Scale: Milestones - Level 1-5 Scale Descriptions |

Next, select the subcompetency or subcompetencies that will also be used as the question(s) and select the “Add Selected Milestone Questions” button.

| | | |
|-------------------------------------|-------------|---|
| <input type="checkbox"/> | [IM] ICS-3 | Appropriate utilization and completion of health records. |
| <input type="checkbox"/> | [IM] MK-1 | Clinical knowledge |
| <input checked="" type="checkbox"/> | [IM] MK-2 | Knowledge of diagnostic testing and procedures. |
| <input type="checkbox"/> | [IM] PBLI-1 | Monitors practice with a goal for improvement. |
| <input type="checkbox"/> | [IM] PBLI-2 | Learns and improves via performance audit. |

The subcompetency will appear as a question on the evaluation form. Batch adding allows the program to use the actual milestones or subcompetencies as the question on the form which also pulls over the default milestone scale (from milestone settings) as well as the level or scale descriptors. Please note that using a milestone or subcompetency as an actual question on the form is NOT RECOMMENDED by ACGME.

To preview the milestone evaluation, select the preview evaluation icon. Here the administrator will be able to see what the newly created milestone evaluation will look like once delivered. Notice the header descriptors are listed below each level. The “expand” pull down allows the evaluator to look at complete descriptions of each level.

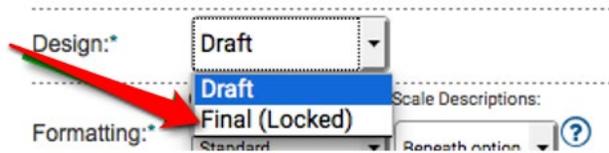
Milestone Eval

Insufficient contact to evaluate (delete evaluation)

| Level 1 | Level 2 | Level 3 | Level 4 | Level 5 | N/A |
|---|--|---|--|--|-----|
| <ul style="list-style-type: none"> Establishes rapport with and demonstrate empathy toward | <ul style="list-style-type: none"> Elicits patients' reasons for seeking health care and expectations from the ED visit | <ul style="list-style-type: none"> Manages the expectations of those who receive care in the ED and uses | <ul style="list-style-type: none"> Uses flexible communication strategies and adjusts them based on the clinical situation to resolve | <ul style="list-style-type: none"> Teaches communication and conflict management skills | |

1. Patient Centered Communication*

- Once the milestone evaluation is completed and ready to be delivered, ensure that the form design is "final(locked)".



Delivering an Evaluation

There are multiple methods for delivering evaluations:

- Individual method – the administrator manually matches the evaluator(s) with the evaluatee(s) by choosing the recipients and targets of the evaluation.
- By schedule method – MedHub makes evaluator/evaluatee matches based upon the schedule, but is manually (ad hoc), scheduled for delivery by the administrator. Faculty MUST be scheduled in MedHub for evaluation matches to be made.
- Automated method – Same as the by schedule method, but the program can set up automated delivery of the evaluations, such that deliveries occur periodically without the administrator having to manually schedule the delivery of evaluations. Faculty MUST be scheduled in MedHub.
- Resident identifies supervisor method – the trainee identifies the supervisor who the trainee worked with on his/her service or rotation. Once the trainee identifies, the evaluation is delivered. Rules are set up by the program.
- Self-Initiated Evaluations – the trainees or faculty can initiate various kinds of evaluations that will be completed by them of an evaluatee. In the case of performance evaluations, residents can choose a faculty member to complete an evaluation on them.

Individual Manual Method

- To deliver an evaluation by the individual method, select the “Deliver Evaluations” button from the Evaluations tab.



Queued Evaluations

| Evaluation Form: | Number: | Delivery Date: |
|------------------|---------|----------------|
| (none) | | |

- Select the Evaluation type and keep the evaluation delivery as individual. Click on the “Continue” button.
Deliver Evaluations - Step 1

Please select the type of evaluation you want delivered and the recipient selection method.

Evaluation Type: Selection Method:

- Select the form you want delivered to the evaluator(s). The form design must be “Final (locked)” before it is available for delivery.

Evaluation Form(s): [SELECT MULTIPLE]

- Select the evaluator(s) from the left hand column that will be completing the evaluation on one or more evaluatees. Select the evaluatees in the right hand column that will be evaluated.

Select...  Recipient(s):* Resident(s) to evaluate:*

| | |
|---|---|
| <ul style="list-style-type: none"> Adcock, Lucienne Alderman, Marylin Alicea, Dannielle Allen, Cassie Alvarez, Latricia Amos, Evie Anderson, Jill Andrade, Shanta | <ul style="list-style-type: none"> Anderson, Jenny (2) Bates, Jennette (2) Baughman, Louie (2) Baum, Enid (2) Beam, Gabrielle (2) Blake, Darell (2) Blanco, Towanda (2) Boston, Robyn (2) |
|---|---|

Shift/Ctrl to select multiple Shift/Ctrl to select multiple

[Off-program faculty](#) | [Outside faculty](#) [Off-program residents](#) | [Outside residents](#)

- Add any notes (optional).

Notes:

- Select a rotation period (optional). This may be helpful if the program needs to identify the rotation period this evaluation occurs. This will appear on the evaluation form.

Rotation Period: 

- Select a service/clinic (optional). This may be helpful if the program needs to identify the service or rotation this evaluation occurs. This will appear on the evaluation form.

Service/Clinic: 

- Select any special options (optional).

Service/Clinic:

Special Options: 

- ✓ (none)
- Electronic Signature Required
- Anonymous Evaluation

Reciprocal Evaluation:

*Anonymous evaluations will strip the name from the evaluation form once the form is completed by the evaluator. This means that the program (Program Director, Program Administrator) will not be able to view who has completed a particular evaluation form if this option is selected. Once the evaluator’s identifying information is removed from the anonymous evaluation, it **CANNOT** be retrieved by MedHub Support. Talk to your GME office about when or if you should send an evaluation as anonymous.

*Note: Trainee evaluations of faculty are automatically confidential hence the faculty member will never see who completed an evaluation of them even if the “anonymous evaluation” option is not selected. However, the program will still be able to view who has completed an evaluation. Certain evaluations types are confidential regardless of the method used to deliver them. You do not have to perform any action to make these evaluation types confidential:

- A. Resident of faculty
- B. Resident of other resident (peer)
- C. Faculty of other faculty (peer)
- D. Student of resident
- E. Student of faculty
- F. Patient/staff of resident
- G. Patient/staff of faculty/program/hospital

9. Opt to send a reciprocal evaluation when one has been completed (i.e. faculty of resident, resident of faculty).

Reciprocal Evaluation: (optional)

10. Define delivery date/time of your evaluation by sending it out immediately, selecting a specific date (at least one day in advance) or adding multiple dates the particular evaluation should be delivered. Click “Submit.”

Delivery:* Immediate
 On Date (Queue)
 Multiple Dates (Queue)

11. You will see the evaluation matches and can confirm delivery.

Deliver Evaluations - Step 3

Evaluation Type: **Faculty evaluation of a resident**
Evaluation Form: **Adult - Week 1 - Patient Care Based Milestones (PC1-4)**
Delivery Date: 09/07/2016 (immediate)

STANDARD MATCHES

| Send: | Recipient: | Evaluation: |
|-------------------------------------|-----------------------|--|
| <input checked="" type="checkbox"/> | Dr. Alicea, Dannielle | Dr. Baughman, Louie - Adult - Week 1 - Patient Care Based Milestones (PC1-4) |
| <input checked="" type="checkbox"/> | Dr. Alicea, Dannielle | Dr. Blanco, Towanda - Adult - Week 1 - Patient Care Based Milestones (PC1-4) |

The delivery process may take several minutes. Don't click submit button below more than once or refresh the page.

Deliver additional evaluations of the same type

12. After confirming the matches, click Deliver Selected Evaluations to deliver evaluations based on the delivery options.

“By Schedule” Manual Method

Note: The ‘by schedule’ method of evaluation delivery assumes the master rotation schedule is fully populated with trainees and faculty have been assigned to service groups and/or scheduled into services/rotations/clinics. If this is not the case, the ‘by schedule’ method of evaluation delivery will not produce the expected results.

1. From the MedHub portal page (Home), select the “Evaluations” button on the top navigation menu and click on the “Deliver Evaluations” button.
2. Select the evaluation type and select the evaluation delivery method, “Schedule (Services/Teams/Tiered)” and click on “Continue.”

Deliver Evaluations - Step 1

Please select the type of evaluation you want delivered and the recipient selection method. 

Evaluation Type: Selection Method:

3. Select the form you want to deliver from among the forms available of this type.

Evaluation Form(s):

4. Select the services/clinics from the first box and match either by service groups (as those are the groups faculty are assigned) or individual services. Service groups remain constant each academic year where faculty are always on that service. Individual services are not constant and change throughout the academic year (i.e. 1 month, 2 weeks, etc.). The “Rotation” selector allows this manual delivery to apply to rotations that have already passed.

Select...  Service(s) / Clinic(s):*

Rotation:*
Match By:*

5. Select the level of the evaluation target (i.e. trainee) and assign the evaluation to all programs, the home/current program or any programs where trainees were released. "All programs" includes trainees who are from the current program and those released from other programs.

Evaluation Targets (Residents)

Level(s):*

Home Program(s):*

Shift/Ctrl to select multiple
Shift/Ctrl

Follow the same steps as delivering evaluations by the individual method:

- Add any notes (optional)
- Rotation period will be automatically tagged to the form
- Service and/or clinic will be automatically tagged to the form
- Send a reciprocal evaluation (optional)
- Select any special options (optional)
- Select delivery

Confirm the evaluation matches and submit for delivery.

Automated Method

If the administrator would like to deliver evaluations using the 'by schedule' method and repeat the process each rotation period throughout the academic year (without having to set it up manually), the administrator can set up automated evaluation delivery which will repeat the delivery criteria automatically as specified.

1. From the MedHub portal page (Home), select the "Evaluation" button and click on the "Add Automated Evaluations" button.

Automated Evaluations ?

| Title: | Rules: | Status: |
|---|--------|---------|
| Faculty of Resident Automated | 2 | Active |

Add Automated Evaluations 

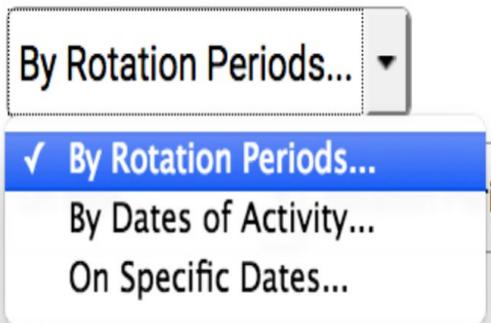
2. Provide the automated rule a title. This name should be descriptive and give an idea about what evaluations are being delivered by the rules in the automated evaluation (i.e. attending evaluation at end of rotation).

Add Automated Evaluations

Title*:

3. Indicate when the evaluations should be delivered:

- By rotation periods
- By dates of activity (this option is useful if a rotation activity or service spans across rotation blocks or the activity does not span an entire rotation period)
- On specific dates

Delivery*: 

- Indicate when the evaluation should be delivered (i.e. 3 days prior to the end of every rotation) and select "Submit."

3 days prior to... ▼ Rotation Period End Date ▼

Submit

Once the automated evaluation has been set up, the administrator can begin to define what is to occur within a delivery rule. A rule can contain one evaluation delivery instance or multiple.

- After the administrator has submitted the type of evaluation that should be automatically delivered, click on the "Add Delivery Rule" button.

Delivery Rules

| Evaluation Type/Rule Name: | Form: | Services/Clinics: | Levels: | Special: | Status: | Actions: |
|----------------------------|-------|-------------------|---------|----------|---------|----------|
| (none defined) | | | | | | |

+ Add Delivery Rule 

- Select the appropriate evaluation type and "Submit".

Add Evaluation Type: Faculty evaluation of a resident ▼ **Submit**

- Define the appropriate evaluation delivery criteria as explained in the manual 'by schedule' method for delivery.

Update Automated Evaluations

Evaluation Type: **Faculty evaluation of a resident**
 Automated Evaluation: End of Rotation Evaluation
 Rule Status*: Active ▼

Rule Name: (optional)

Evaluation Form*: Inpatient Medicine Faculty Evaluation of Resident ▼

Select... Services/Clinics: All Services
 AmbFamMed
 Blue
 Community Medicine & Research
 Dermatology
 Family Medicine
 Family Medicine Inpatient
 Geriatrics
 Gynecology

Match By*: Individual Services ▼

Evaluation Targets (Residents)
 Level(s)*: Level 0, Level 1, Level 2, Level 3, Level 4, Level 5, Level 6, Level 7
 Home Program(s)*: ALL PROGRAMS, This Program (Family Medicine)

Notes: (optional)
 Special Options: (optional) (none) ▼

Submit

- Repeat this process if there is more than one evaluation type to be delivered as part of the automated evaluation.
- Once all rules are added, if the administrator is satisfied with the automated evaluation, change the status to "Active" and click "Submit."

Automated evaluations and automated evaluation rules will deliver in perpetuity as long as the form associated with the automated evaluation rule is not inactivated and as long as the services/service groups associated with the rules in the automated evaluation are not changed.

Title*:

Status:

Delivery*:

Delivery Rules

| Evaluation Type/Rule Name: | Form: |
|--|------------------------|
| Faculty evaluation of a resident | Inpatient Medicine Fac |

Residents Identify Supervisors Method

Another delivery method available for programs is the Residents Identify Supervisors (RIS) method. This puts the onus on the trainee to identify who he/she worked with for a specific rotation period in order for the evaluation to be delivered. If a program chooses to use this option, the administrator must enable this in Program Settings initially.

- Select the Program Settings link from the MedHub portal page (Home) and choose the evaluations tab.
- Enable the setting "Residents Identify Supervisors" option. Save settings.

Residents Identify Supervisors ([Settings](#)):

- Select the Evaluations tab from the top navigation bar and locate the "Residents Identify Supervisors" link.

Evaluation Functions

[View Completed Evaluations](#)

[Incomplete Evaluations](#)

[Residents Identify Supervisors](#)

- Choose the Settings/Services tab to set up the appropriate evaluation delivery.

Completion Statistics Settings/Services

Service(s): Resident(s): Display: Start Date*: End Date*:

5. The program can choose to set up a default evaluation that will be submitted or the program can choose to deliver particular evaluations based on the type of service or rotation. To set up general default settings, select the faculty of resident evaluation form that should be used.

General Settings

Resident of Faculty Form (default):

Faculty of Resident Form (default): 

If the program intends to have a reciprocal evaluation initiated, the administrator can choose which resident of faculty form should be delivered as well.

6. Select when an e-mail should be sent to the trainee indicating he/she needs to identify his/her supervisor during a specific rotation or service. The administrator can also choose send late e-mail alerts if the trainee has yet to select his/her supervisor.

Send Request to Residents:

Send Late Alert (Weekly):

7. Select the number of individuals the trainee MUST select or the number that is required for the evaluation to be delivered. The administrator can also select the number of supervisors that are recommended to be selected (as a guideline) for evaluations to be delivered.

Required Evaluations (default):

Recommended Evaluations (default):

8. If necessary, the administrator can enable the following settings:

- "Enable for Released Residents" to require released trainees to identify their supervisor,
- "Include Outside Evaluators" in the list of supervisors
- "Display Released Services" that are from other programs where their trainees have been released.

Enable for Released Residents:

Include Outside Evaluators:

Display Released Services:

9. Click submit. This sets up the default process for having trainees identify supervisors where the same evaluation form is used regardless of the type of rotation or service.
10. To enable RIS for a service and/or set other rules based on the type of service, especially if a different evaluation form should be used, select checkbox of the service or rotation where additional rules will apply and submit. Once submitted, the link to that service becomes active so additional rules can be set up.

| | | | |
|-------------------------------------|-----------------------------|-----------|-----------|
| <input checked="" type="checkbox"/> | Dermatology | (default) | (default) |
|-------------------------------------|-----------------------------|-----------|-----------|

11. Click on the link of that service and set up the evaluations to be used along with the other rules as described when setting up the general settings.

| | | |
|---|---|--|
| Service: | Family Medicine | |
| Required Evaluations: | 1 ▼ | |
| Recommended Evaluations: | 1 ▼ | |
| Resident of Faculty Form: | (use default form) ▼ | |
| Faculty of Resident Form: | (use default form) ▼ | |
| Resident of Faculty Special Options: | (none) ▼ | |
| Faculty of Resident Special Options: | (none) ▼ | |
| Supervisor Programs: (at least one required) | <input type="checkbox"/> Anesthesiology <input type="checkbox"/> - Adult Cardiothoracic Anesthesiology <input type="checkbox"/> - Ambulatory Anesthesia | <input type="checkbox"/> Internal Medicine/Pediatrics <input type="checkbox"/> Lance's University - NP <input type="checkbox"/> Liz's Rockstar Program |

- Define the number of required supervisors that must be identified if it differs from the default setting.
- Define the number of recommended supervisors that can be selected if it differs from the default.
- Identify the particular evaluation form that should be used specifically for this service or rotation.
- Identify if any special options should be used when the evaluation is delivered (i.e. anonymous or require electronic signature).
- If there might be faculty from other training programs that might be evaluating the trainee, select those programs so the faculty of these programs will appear in the list of supervisor options.
- Update Service.

By selecting a different evaluation form for a particular service, this form will be sent (once the resident identifies the supervisor) rather than the default evaluation form under the general settings.

| | | | | |
|-------------------------------------|---------------------------------|-----------|--|---|
| <input checked="" type="checkbox"/> | Family Medicine | (default) |  | Inpatient Medicine Faculty Evaluation of Resident |
|-------------------------------------|---------------------------------|-----------|--|---|

Once the RIS method has been set up, the trainee will receive an e-mail the specified number of days prior to the rotation end date where they'll be requested to identify the faculty they worked with on that service for that rotation. Once the trainee identifies their supervisor(s), those faculty members will receive the evaluation form the administrator chose in either the default settings or at the service level of the RIS setup process.

Self-Initiated Method

Programs have the ability to set up self-initiated evaluations for both residents and faculty. These are evaluations residents or faculty members can send at any time. While the administrator does not have to deliver these forms, the administrator must create and finalize the evaluation forms before a resident or faculty member can initiate evaluations on their own.

There are a few types of evaluations that can be initiated:

- Faculty-Initiated Resident Evaluations (i.e. evaluations of a trainee initiated by the faculty member)
- Resident-Initiated Faculty Evaluations (i.e. evaluations of a faculty member initiated by the trainee)
- Resident-Initiated Peer Evaluations (i.e. evaluations of another trainee initiated by a trainee)
- Resident-Initiated Self Evaluations (i.e. evaluations of themselves initiated by themselves)
- Faculty-Initiated Peer Evaluations (i.e. evaluations of other peer faculty initiated by a faculty member)
- Resident-Initiated Program Evaluations (i.e. evaluations of the program initiated by the trainee)
- Faculty-Initiated Program Evaluations (i.e. evaluations of the program initiated by the faculty member)

- Resident-Initiated Performance Evaluations (i.e. evaluation of the trainee to a faculty member initiated by the trainee)

If a program chooses to use this method of evaluation delivery, the initiation of such evaluations must be enabled in program settings from the home page.

- From Program Settings, select the Evaluations tab.
- Find the section on Self-Initiated Evaluations.
- Set up the initiation by choosing which type of evaluation can be initiated by either the faculty member or a trainee.

If selecting the “Faculty Initiated Resident Evaluation”, click on the “Add Form” button.



Choose the evaluation form that the evaluator will use and identify any special options (anonymity or electronic signature). Add Form.

Add Faculty-Initiated Evaluation of Resident

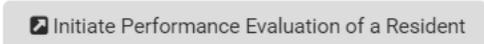
Evaluation Form:

Special Options:

Mobile Access:

Add Form

- Once the form is added, the faculty member will now see a button on his/her evaluations tab called, “Initiate Performance Evaluation of a Resident.”



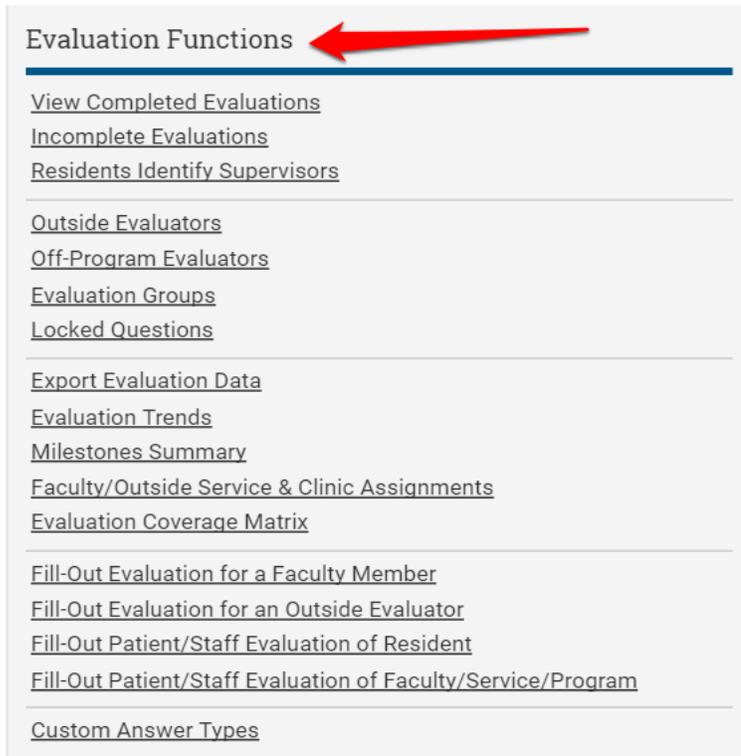
Once they select this button, they’ll choose the trainee and the evaluation that was identified in program settings will be sent to them for completion.

- Follow the same process above for other self-initiated evaluations. The trainees or faculty members will get an “initiate evaluation” button on their evaluations tab based on the type of evaluation chosen.

Evaluation Functions

Home > Evaluations Tab

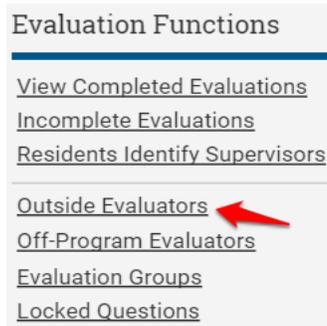
On the right hand side of the main evaluations page is a list of "Evaluation Functions"



This is where you can, among other things, view completed and incomplete evaluations, fill out evaluations on behalf of others, create custom answer types as well as the following functions.

To add an Outside Evaluator -

1. Select the "Evaluations" tab from the MedHub portal page (Home) and click on the "Outside Evaluators" link.



2. Select the "Add Outside Evaluator" button.

Modify Outside Evaluator List

Use the following list to define outside evaluators to which you send evaluations.

| Name: | Email: | Type: |
|--|--------|-------|
| + Add Outside Evaluator | | |
| View Inactive Outside Evaluators | | |

3. Add the name of the outside evaluator, user type (i.e. faculty, staff, etc.), and e-mail address. Select “Submit.”

Add Outside Evaluator

First Name:*

Last Name:*

User Type:* Resident ▾

Email:*

Location:

Location Abbrev:

✓ Resident

Faculty

Staff

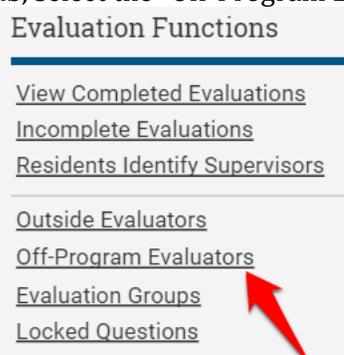
Patient

Student

The outside evaluator will receive an e-mail with a link to the delivered evaluation which allows them to access and complete the evaluation without logging into MedHub.

In addition, if there are faculty from other programs at the institution (that aren't usually a part of the home program) or residents/fellows from other programs that also may evaluate the program's trainees, do NOT make them an outside evaluator, but an Off-Program Evaluator instead. These individuals already have a MedHub profile from their respective programs.

1. From the evaluations tab, select the “Off-Program Evaluators” link.



2. To add faculty, select the “Add Faculty to List” link. To add other trainees, select the “Add Resident to List” link.

Faculty Members

| Faculty: | Program: | Actions: |
|----------|----------|----------|
| (none) | | |

[+ Add Faculty](#)

Residents

| Resident: | Program: | Actions: |
|-----------|----------|----------|
| (none) | | |

[+ Add Resident](#)

Select the program the faculty member or trainee is associated and select the individuals name from the list. Submit. That individual will now be available to send evaluations.

Add Faculty Members

Faculty Members to Add:

Shift/Ctrl to select multiple

Faculty Members

| Faculty: | Program: | Actions: |
|--|-----------|---|
| Akers, Merrill | ANES-CARD | <input type="button" value="✕ Remove"/> |
| <input type="button" value="+ Add Faculty"/> | | |

To see which faculty are assigned to services, click on the "Faculty/Outside Service & Clinic Assignments" link

- [Faculty/Outside Service & Clinic Assignments](#)
- [Evaluation Coverage Matrix](#)
- [Fill-Out Evaluation for a Faculty Member](#)
- [Fill-Out Evaluation for an Outside Evaluator](#)
- [Fill-Out Patient/Staff Evaluation of Resident](#)
- [Fill-Out Patient/Staff Evaluation of Faculty/Service/Program](#)
- [Custom Answer Types](#)

This will show a screen with all faculty/outside evaluators that are assigned permanently or scheduled to specific services in the program.

Faculty/Outside Service & Clinic Assignments

| Type: | Service/Clinic Name: | Evaluator Name: | User Type: | Dates: | Evaluate: |
|---------|----------------------|--------------------------------|------------|--------------------|-----------|
| Service | Blue | Devore, Mark | Faculty | 7/1/2015-5/31/2016 | Yes |
| Service | Dermatology | Devore, Mark | Faculty | (permanent) | Yes |
| Service | Family Medicine | Devore, Mark | Faculty | (permanent) | Yes |
| Service | Family Medicine | Hargrove, Jane | Faculty | 5/5/2016-5/20/2016 | Yes |

To see what services are covered by any automated evaluations that are set up, click on the "evaluation Coverage Matrix" link. You will see a matrix of your services, and you can control which evaluation types show by clicking the "Matrix Settings" link.

Evaluation Coverage

Use this tool to identify coverage of Automated Evaluations and Residents Identify Supervisors (if applicable).



| Service Group | Evaluation Type | | | |
|-------------------------------|---|--|---|--|
| | Resident evaluation of faculty member | Faculty evaluation of a resident | Resident evaluation of a service/clinic | Resident evaluation of other resident (peer) |
| AmbFamMed | Faculty of Resident Automated RIS | Faculty of Resident Automated End of Rotation Evaluation RIS | | |
| Blue | Faculty of Resident Automated RIS | Faculty of Resident Automated End of Rotation Evaluation RIS | | |
| Community Medicine & Research | Faculty of Resident Automated | Faculty of Resident Automated End of Rotation Evaluation | | |

Program Settings

Home>Program Settings>Evaluation Tab

Evaluation program settings are where to find the settings on when an evaluation is considered late, how to control access to evaluations, and the default options for delivery of forms. For more information on each setting, go to your program settings in MedHub, and click the "?" to see a knowledge base article.

Program Settings

General
Schedules
Procedures
Evaluations
Conferences
Duty Hours
Custom Alerts

General Evaluation Settings

Evaluations Due:* 30 days ▾ ⓘ

Minimum Shared Service Days for Delivery:* 6 days ▾ ⓘ

Minimum Shared Clinics for Delivery:* 3 clinics ▾ ⓘ

Email Resident on Performance Evaluation:

Mask Evaluator Name from Mentor View: ⓘ

Tracking Status:

Yes - Residents (only) Verify ▾

Resident Alerts:

(disabled) ▾ ⓘ

Track Resident Evaluation Reviews:

Enable Tiered Evaluations: ⓘ

Tiered Evaluations - Lock after Delivery: 14 days ▾ ⓘ

Residents Identify Supervisors ([Settings](#)): ✓

Access to Evaluations

- Show Competency/Milestone Charts: ?
- Service Head Access to Service Evaluations: Show all evaluations ▾ ?
- Resident Access to Faculty Evaluations: Show all faculty evaluations ▾ ?
- Resident Access to Patient/Staff/Peer Evaluations: Hide until 3 completed evaluations (per form) ▾ ?
- Resident Access to Student Evaluations: Hide until 3 completed evaluations (per form) ▾ ?
- Resident Access to Alert Comments:
- Resident Access to Aggregate View: ?
- Faculty Access to Aggregate View: Hide until 3 completed evaluations (per form) ▾ Release in blocks of 3 ▾ ?

Evaluation Form Options

- Require Electronic Signatures: ?
- Disable "Insufficient Contact" links: ?
- Require Comment on "Insufficient Contact": ?
- Email Admin on "Insufficient Contact": ?
- Attach Curriculum Objectives to Forms:
- Display Scale Descriptions on Completed Evaluations:
- Repeat Scales on Consecutive Questions: ?

Defining and Managing Procedures

From the MedHub portal page (Home), select the “Procedures” tab located on the top navigation menu.

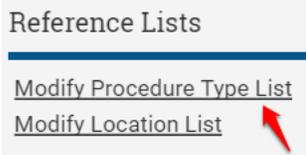


Two steps are required to add and manage procedures:

1. Defining a procedure list
2. Defining procedure requirements

Defining a Procedure List

1. Select the “Modify Procedure Type List” link from the Procedures tab.



2. To add procedures, select the “Add Individual Procedure Type” or the “Import Procedure Type List” buttons. The “Import Procedure Type List” will allow the administrator to upload a list of procedures from an Excel file (.xls).

Procedure Type List

Use this list to define the types of procedure types logged by the residents/fellows in your program. ⓘ

| Procedure Type: | CPT®: | Evaluation: | Actions: |
|--------------------------------------|--|-------------|----------|
| (no procedure type codes defined) | | | |
| + Add Procedure Type | + Import Procedure Type List | | |

3. If choosing to manually add each individual procedure, name the type of procedure that should be added to the list. This list will be viewed by the trainees as they log their procedures.

Add Procedure Type

| | |
|-----------------------|--|
| Procedure Type Name:* | <input type="text" value="Central Line Placement"/> |
| CPT® Code: | <input type="text"/> |
| Evaluation: | <input type="text" value="(program default) ▼"/> <input type="checkbox"/> Always send evaluation |
| | <input type="button" value="Submit"/> <input type="checkbox"/> Add Another Procedure Type |

4. Select “Submit.” The procedure will be added to the list of procedures.

| Procedure Type: | CPT@: | Evaluation: | Certify: | Required for Certification: | Actions: |
|------------------------|-------|-------------------|----------|-----------------------------|----------------|
| Central Line Placement | -- | (program default) | Yes | -- | Modify Delete |
| Knee Injection | -- | (program default) | Yes | -- | Modify Delete |
| Laceration - Sutures | -- | (program default) | Yes | -- | Modify Delete |
| Lumbar Puncture | -- | (program default) | Yes | -- | Modify Delete |

Defining Procedure Requirements

1. From the Procedures tab, select the “Add Procedure Type Requirement.” Procedure Requirements

| PGY(s): | Procedure Types: | Requirements: | Order: | Actions: |
|----------------|------------------|---------------|--------|----------|
| (none defined) | | | | |
| | | | | |

2. Add the various requirements pertinent to a specific procedure.

Add Requirement

Use this form to add or modify requirements for this program.

Label (optional)

Types (one required) All Types

- Abdominal Paracentesis
- Amputation
- appendectomy
- Arterial Line
- Arthrocentesis (other joints)
- Arthrocentesis of the knee joint
- Breast examination
- Burn off wart
- Central Line
- Central Venous Line Placement
- Drawing Arterial Blood (ABIM required)
- Drawing Venous Blood (ARIM required)
- HIV - Provide care to a Transgende...
- HIV - Provide end of life/palliative...
- HIV - Provide mental health screenin...
- HIV - Provide prophylaxis of opportu...
- HIV - Provide substance abuse screen...
- HIV - Provide substance intervention...
- HIV - Provide treatment adherence co...
- HIV - Provide treatment of opportuni...
- HIV Lead a multidisciplinary meeting
- HIV Management of Chronic Medical Con...
- HIV Management of Urgent Medical Con...
- HIV Provider Preventive Services (va

Levels (required) All Levels

- Level 1
- Level 2
- Level 3
- Level 4
- Level 5
- Level 6
- Level 7
- Level 8
- Level 9

Requirement (one required) All Requirements

Add Requirement [\[cancel\]](#)

QTY:

Select one or more of the following:

- Total Logged (any role)
- Performed
- Assisted
- Observed
- Supervised
- Read & Interpreted
- Simulated

- Select the procedure
- Select the trainee levels to which the procedure requirement pertains, if any
- Define the requirement (number of total procedures, number of total must be primary performed, etc.)
- Repeat for other procedures if necessary

For those programs required to log procedures through the ACGME web site, MedHub can change the procedures link in the top navigation menu to go directly to the ACGME website. Please send MedHub a support ticket with this request.

Program Settings

Home>Program Settings> Procedure Tab

Procedure program settings are where to find the settings for procedure definitions and logs. If you need further information about a setting, in MedHub click on the "?" to see a knowledgebase article.

Procedure Form Settings

Supervisor Menu:*

Include Residents in Supervisor List:

Track "Visit Types" (options):*

Include Clinics in Location List:

Include "Patient ID" in Log:

Allow Batch Procedure Entry:

Procedure Types

Maximum Procedures Types per Form:*

Force at least One (1) Procedure Type:

Residents can log "Other" Procedure Types:

Procedure Roles:

- Performed
- Assisted
- Observed
- Supervised
- Read & Interpreted
- Simulated

Diagnosis Types

Method to Record Diagnosis:

Diagnosis Code Label:

Maximum Diagnoses per Form:*

Force at least One (1) Diagnosis:

Enable Diagnosis Roles:

Verifications, Certifications & Evaluations

Residents Initiate Procedure Evaluations:

Default Evaluation Form:

Enable Procedure Verifications:

Certify Residents for Procedures:

Verifying Supervisor at threshold to Certify:

Disable Evaluation if Resident is Certified:

Disable Verification if Resident is Certified:

Creating and Managing Conferences

From the MedHub portal page (Home), select the “Conferences” tab on the top navigation menu.



Defining Conference Groups

1. Select “Define Conference Groups.” This is the first step in creating and scheduling conferences for the training program. At least one conference group must be defined to begin using the conference functionality in MedHub. Defining conference groups allows the training program to calculate conference requirements for different types of conferences.

In most programs this will be very simple – the program could define a conference group called ‘All Conferences’ to drive attendance requirements across all conferences within the program, or at a minimum, to begin tracking attendance for their conferences. Other programs may decide to drive multiple requirements for different types of groups (example: by PGY level) and therefore would need to create a conference group for each. Examples of multiple conference groups are:

- Journal Club
- Grand Rounds
- Morning Report
- Morbidity and Mortality (M&M)

Conferences

Conference Maintenance

[Update Conference Schedule](#)

View, print, modify, and delete conferences for this program.

[Define Conference Requirements](#)

Specify conference attendance requirements for this program.

[Define Conference Groups](#)

Specify conference groups for this program.

2. Select “Add Conference Group.”

Conferences

Conference Maintenance

[Update Conference Schedule](#)

View, print, modify, and delete conferences for this program.

[Define Conference Requirements](#)

Specify conference attendance requirements for this program.

[Define Conference Groups](#)

Specify conference groups for this program.

3. Create a name of a conference group that may need defined requirements. Submit.

Defining Conference Requirements

1. Select “Define Conference Requirements.”

Conferences

Conference Maintenance

[Update Conference Schedule](#)

View, print, modify, and delete conferences for this program.

[Define Conference Requirements](#)

Specify conference attendance requirements for this program.

[Define Conference Groups](#)

Specify conference groups for this program.

2. Select the “Add Resident Requirement” button.

Conference Requirements

Use this section to add or modify the conference requirements for this program. [?](#)

Resident Conference Requirements

| Requirement Name: | Conference Group(s): | Level(s): | Exception(s): | Required: |
|--|----------------------|---------------------------------------|---------------|---|
| (no requirements set) | | | | |
| + Add Resident Requirement | | View All Requirements | | Rotations Marked "Exempt" |

3. Define the conference requirements for all conferences groups or for an individual conference group. This includes:

- Defining a requirement name for the conference group.
- Identifying the PGY level(s) to which this requirement applies (i.e. all PGY levels or specific PGY levels).
- Defining the requirement by either using credits or percentages (Percentage requirements are recommended). If defining requirements by credit, conferences must carry at least one credit.
- Defining any exemptions to the requirement.
 - **Absences** – if a trainee has an approved absence from the program, they will be exempt from attending a scheduled conference.
 - **Offsite Rotations** – if a trainee is scheduled for an off-site rotation (a rotation that is tagged to a site that is not “Internal”), he/she will be exempt from scheduled conferences while on that off-site rotation. (Review the site/funding link from the home page to understand which sites are indicated as “off-site” for the training program.)
 - **Released Rotations** – if a trainee is released to another program for a rotation and are not expected to attend a scheduled conference, he/she can be exempt from attending.

- **Rotations Marked Exempt** – Any rotation marked as ‘exempt’ will relieve the trainee from attending a conference.

NOTE: Exemptions eliminate a trainee’s obligation to attend a conference. However, their name still appears on the attendance sheet for exempt conferences in the event they attend an exempt conference.

Repeat, if necessary, for other conference groups.

Creating the Conference Schedule

1. Select “Update Conference Schedule.”

Conferences

Conference Maintenance

[Update Conference Schedule](#)

View, print, modify, and delete conferences for this program.

[Define Conference Requirements](#)

Specify conference attendance requirements for this program.

[Define Conference Groups](#)

Specify conference groups for this program.

Record Conference Attendance

(select conference) ▾

2. Select “Add New Conference” button.

Conference Schedule

Export RSS Feed

+ Add New Conference List View Calendar Display: Recent/Upcoming Lectures Advanced search

Date: Day: Time: Place: Conference: Presenter(s): Curriculum: Credits: Messages: Materials: Actions:

There are no conferences scheduled for this period.

You must define at least one [Conference Group](#) before adding an item to the Conference Schedule.

3. Add information pertaining to a conference that includes:
 - Name or title of conference.
 - Define a location of the conference.
 - Identify a date and start/end time of the conference.
 - You can opt to “batch” schedule conferences that occur on the same day and time at a specified frequency (weekly, bi-weekly, etc.) during a specific data range (i.e. academic year). However, if the program adds the same place or the same lecturer when batch adding multiple conferences, the location and the name of the lecturer will populate all of these conferences. Because of this, when batch adding conferences, it is best not to define a lecturer or location unless each instance of the conference will have same lecturer and take place at the same location.

New Conference

Conference Title:*

Place:

Date/Time:* Date: Start Time: End Time:
(MM/DD/YYYY)

Create multiple conferences using the following rules... [?](#)

Day(s) of the week:

Shift/Ctrl for multiple

Frequency:

Date ending: (MM/DD/YYYY)

Conferences will begin on the lecture date indicated above.
 At least one day must be selected above and start/end dates must be in the same academic year.

- Add the lecturer by selecting from the *list* of program faculty, *searching* for other faculty within the institution or adding an “*other*” presenter that may be outside of the institution. (“*Other*” lecturers only receive conference notifications if an email address is entered for them.)
- Add any credits attendees will receive for attending this conference. (Used for conference requirements by credit.)
- Select the conference group this conference will be assigned.
- Opt to make conference mandatory. This is displayed as an asterisk (*) on the conference schedule and on the personal calendar.
- Opt to post to trainees and faculty personal calendars in MedHub.
- Assign one or more of the ACGME competencies to the conference.
- Assign to all PGY levels or specific PGY levels.
- Opt to share this conference with other programs whose trainees may also attend this conference. If sharing with other programs, only the author program will be able to edit certain information about the conference.

Credits:* [?](#) Mandatory: [?](#)

Group:* Post to Calendar: [?](#)

Competencies:

| | |
|---|--|
| <input type="checkbox"/> Interpersonal Communication Skills (ICS) | <input type="checkbox"/> Practice-based Learning and Improvement |
| <input type="checkbox"/> Medical Knowledge | <input type="checkbox"/> Professionalism |
| <input type="checkbox"/> Patient Care | <input type="checkbox"/> Systems-based Practice |

Post to programs:* [\[select all \]](#)

- Anesthesiology and Pain Management Dept
- Adult Cardiothoracic Anesthesiology
- Anesthesiology
- Critical Care Medicine
- Obstetric Anesthesiology

4. Click "Submit."

Once conferences have been scheduled, they will be listed under the "Update Conference Schedule" link. Here the program can also upload any materials related to the conference and add additional information to each conference such as exact titles of the conference based on presentations and identifying the different lecturers for each conference. The lecturer will also have the ability to upload any materials if assigned as the lecturer to a particular conference. You can make changes to individual conferences, even if the conferences were entered in "batch" mode.

Conference Schedule

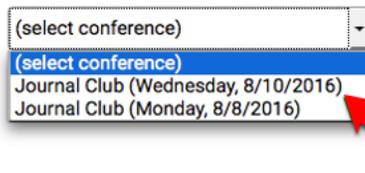
| Date: | Day: | Time: | Place: | Conference: | Presenter(s): | Curriculum: | Credits: | Messages: | Materials: | Actions: |
|-----------|-----------|-----------------|----------|--------------|---------------|--------------------|----------|-----------|------------|-------------------|
| 8/8/2016 | Monday | 11:00am-12:00pm | Location | Journal Club | -- | Back to the Basics | 1 | 0 | 0 | Attendance Delete |
| 8/10/2016 | Wednesday | 11:00am-12:00pm | Location | Journal Club | -- | Back to the Basics | 1 | 0 | 0 | Attendance Delete |
| 8/15/2016 | Monday | 11:00am-12:00pm | Location | Journal Club | -- | Back to the Basics | 1 | 0 | 0 | Attendance Delete |

Recording Conference Attendance

Now that conference requirements have been defined and the conference schedule has been created, all users (residents, faculty) within the training program will be able to view the conference schedule. The administrator has the ability to record attendance after the conference has been held.

1. To record conference attendance, select the particular conference from the pull-down under Record Conference Attendance from the Conferences tab.

Record Conference Attendance



2. Record trainee's attendance by clicking on the checkboxes by each trainee's name. Faculty attendance can also be taken on the same attendance sheet as well. Faculty conference attendance must be enabled under Program Settings, Conferences tab for their names to appear on the attendance sheet. Note, you can also mark a trainee as "Excused" from a conference (E) or late to a conference (L). This information is available in certain reports. Also, excused conferences are removed from requirements.

Conference Attendance

Conference Attendance: Journal Club (Wednesday, 8/10/2016)

Select/Remove All

INTERNAL MEDICINE Select/Remove All

Applicant Test, Learning (1) Resident 1, Applicant (1)

Redd(Resident), Tina (1)

E Excused residents **L** Late residents

Deliver Learning Module

- To print a conference attendance sheet for sign-in, click on the 'print attendance sheet' link at the top of the attendance sheet.
- To identify trainees with recorded absences, select the "Attendance Sheet Settings" link.

Conference Functions

- [Conference Locations](#)
- [Export Conference Attendance](#)
- [Attendance Sheet Settings](#)
- [Conference Schedule/Attendance Access](#)

- Enable "Identify residents with recorded absences" by clicking on the checkbox. This will identify on the conference attendance sheet who has a recorded absence.

Attendance Sheet Settings

Signature Line Style:

Instructions:

To receive credit for attending this conference, place your initials next to your name below. If you were not able to attend the entire conference, please list the start and end times of attendance after your name.

Display Options:

- Identify residents with recorded absences
- Sort residents by level
- Display bar code for mobile device materials download

NOTE: Attendance sheet uses the settings of the program that initially created the conference.

Journal Club (Monday, 8/8/2016)

Select/Remove All

INTERNAL MEDICINE

| | |
|---|--|
| <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Applicant Test, Learning (1) | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Resident 1, Applicant (1) |
| <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Redd(Resident), Tina (1) <input checked="" type="checkbox"/> | |

Noted Absences: Vacation Away Conference LOA Leave of Absence Excused resident:

Program Settings

Home>Program Settings>Conferences Tab

Conference program settings are where to find the settings for who shows on attendance sheets, as well as other conference settings. If you need further information about a setting, in MedHub click on the "?" to see a knowledgebase article.

Conferences Settings

| | | |
|--|--|---|
| Send Email Alert to Lecturers:* | First Notice: 3 Day(s) prior to lecture | Second Notice: 1 Day(s) prior to lecture |
| Display Conference Times:* | Standard Format (am/pm) | |
| Conference presenter name display:* | Full name | |
| Conference change notifications:* | Prompt to send notifications | |
| Faculty Conference Attendance: | <input checked="" type="checkbox"/> | ? |
| Visiting Resident Conference Attendance: | <input checked="" type="checkbox"/> | |
| Student Conference Attendance: | <input type="checkbox"/> | |
| Track <u>Outside Evaluator</u> Attendance: | <input checked="" type="checkbox"/> | |
| Attendance Tracked by Residents: | <input type="checkbox"/> | ? |
| Mark "Excused" Residents/Faculty: | <input type="checkbox"/> | ? |
| Mark "Late" Residents: | <input type="checkbox"/> | ? |
| Enable Asynchronous Conference Credit: | <input checked="" type="checkbox"/> | ? |
| Credit for Attending "Exempt" Conference: | <input checked="" type="checkbox"/> | ? |
| Upload Attendance (Card Reader): | <input checked="" type="checkbox"/> | |
| Mobile Attendance Scanning (codeREADr): | <input checked="" type="checkbox"/> | ? |
| Public Conference Schedule View: | <input checked="" type="checkbox"/> | ? https://preview.medhub.com/functions/public/conferences.mh?p=481 |
| Public Conference RSS Feed: | <input checked="" type="checkbox"/> | ? https://preview.medhub.com/functions/public/conferences_rss.mh?p=481  |

[Save Settings](#)

System Help Overview

Administrators can direct all questions involving institutional process issues to the GME office by clicking on the “Help” button on your top navigation menu and logging a support ticket by selecting GME Office or e-mail them directly.

Administrators can also log a support ticket directly to MedHub Support by following the instructions above and selecting “MedHub Support” as the recipient. MedHub can only respond to questions around training. **We do not answer question related to internal institutional process and are prohibited from creating or removing user profiles or, editing, deleting or otherwise directly managing any data.** Those revision approvals must go through the GME Office.

Help Resources Support Tickets

Contact Admin/Support ?

Send to: MedHub Support
Message:

Browse... No file selected.
Browse... No file selected.
Browse... No file selected.

Send Message

Ticket History
(no tickets logged)

For additional review of the information outlined in this manual, MedHub has a series of on-line video tutorials that are available. From the MedHub portal page (Home), select the Help tab.



There will be a list of video tutorials that are available to administrators for viewing. We encourage you to review these to assist in understanding the various functionalities in MedHub.

Help Resources Support Tickets

Search Resources

New Content

Delivering a Test
Viewing time: 4.25 min

Requesting an Absence by Trainees
Viewing time: 4.75 min

Browse Resources

- Knowledgebase Articles
- Video Tutorials
- User Manual

