

Program Coordinator Volunteer Renewal Process

1. The renewal process will begin in Mid-March of every year and will last until all volunteers' who are up for renewal in that year are either renewed or non-renewed. Volunteer appointments are up for renewal on June 30th of the given year. Clinical Adjunct Assistant Professor/Preceptor appointments are active for 3 years, unless otherwise notified.
2. To start the renewal process, enter PIMS here: <https://pims.fammed.wisc.edu/>
3. Click on the "Clinical Adjunct Faculty" button, and enter the Clinical Adjunct Faculty Dashboard.
4. Select the program which you are the program coordinator for, such as GHC, Madison, etc. from the dropdown listed under My Programs.

The screenshot shows the 'Volunteers Dashboard' with a 'My Programs' dropdown menu open. The menu lists several programs, with 'Group Health Cooperative' highlighted in blue and a red box around it. The main table below shows a list of programs with columns for Program, Begin, End, Status, and Actions.

Program	Begin	End	Status	Actions
OMSE	2013-07-01	2016-06-30	Active	Select Action
Madison	2013-07-01	2016-06-30	Active	Select Action
OMSE	2014-07-01	2017-06-30	Active	Select Action
Aurora	2014-07-01	2017-06-30	Active	Select Action
Wausau	2015-01-12		Active	Select Action

5. To edit a volunteer you must click on the volunteer's name in the Clinical Adjunct Faculty Dashboard. Scroll down past the WorkFlow portion on the volunteer's person page and select "Edit Volunteer". **NOTE:** If there is more than one necessary field missing information, your edit will not save until all missing information has been entered. To keep track of each volunteer's information you may create an Excel document with all required fields and update information there until you have all the necessary information to complete the edit.
6. Once the edit is complete, enter the Volunteer's activity hours by using the Manage Activities portion on the volunteer's person page. Select the "Manage Activities" button.

The screenshot shows the 'Details' page for a volunteer. It has three main sections: 'Details', 'Address', and 'Activities'. The 'Details' section contains a table with fields like Program, Title, Begin Date, End Date, Specialty, Board Certified, and Privileges. The 'Address' section contains a table with fields like Contact Method, Contact Email, Practice Name, Address, and Phone. The 'Activities' section contains a table with columns for Activity and Hours. A red box highlights the 'Manage Activities' button at the bottom left.

Program	GHC
Title	Clinical Adjunct Assistant Professor
Begin Date	2012-07-01
End Date	2015-06-30
Specialty	Family Medicine
Board Certified	2009-07-09
Privileges	will have UWHC, St. Mary's, Meriter

Contact Method	Email
Contact Email	stephanie.skadzien@fammed.wisc.edu
Practice Name	GHC
Address	5249 East Terrace Drive Madison, WI 53718
Phone	(608) 845-9531

Activity	Hours
Supervise or teach residents, fellows, and SMPH students in clinical settings	0

- a. A page will appear that will prompt you to enter the Volunteer Faculty’s activity hours, the minimum number of hours is 25 hours per year. **NOTE:** If you do not know the volunteer’s hours, enter a hypothesized amount (25 hours or more) and click Submit. The volunteer can correct the number of hours on the activities form. The Volunteer Coordinator will update the number of hours once the volunteer completes and updates their Activity Form and returns it to DFMCH HR.

- b. If the volunteer has more than one activity listed, you should split up hours accordingly between the activities. To do this you will first see one of the activities listed in a drop down menu, select the first activity, enter hours and click on the “Log Hours” button. This activity and hours should then show up in the Activities section on the Manage Activities page.
 - i. To add hours to another activity, return to the drop down menu under the Add Activity section and select the second activity, enter the hours, and select the “Log Hours” button. Repeat this process until all of the volunteer’s activity hours are accounted for, making sure that they add up to a minimum of 25 hours annually. (This is only necessary if the volunteer has more than one activity listed on their activity form). **NOTE:** If you have to make a change to hours that have already been entered for that renewal cycle, you must **delete** the previous entry under the Details section and then resubmit hours for that activity. Only delete the hours entry if there is a duplicate for that year.
- c. If you do not choose to update the volunteer’s Activities before selecting “Renew”, the system will prompt you to enter them at that time. The same rules in step 5a and 5b will apply.

7. Click “Renew” in the Work Flow section of the individual’s volunteer profile, review the title, start/end dates and add comments for the renewal if necessary. The begin date of the renewal should be July 1st of the new fiscal year, and the end date should be 3 years from the renewal date (ex. Renewal begin date: 7/1/2016; End date: 6/30/2019). Review the activities selected for the reappointment letter. If the volunteer is no longer

participating in any of the selected activities, please unselect it before continuing. Once you have reviewed and determined the information to be accurate, select “Renew”.

Doe, Jane

Email: test@example.com
Service: 0 days

Volunteer Appointment Renewal

Please update the Volunteer's term dates below to match their new appointment. The current appointment is from 2015-08-25 to 2016-06-30.

Volunteer Details

Title: Clinical Adjunct Assistant Professor

Comment:

Begin date: 2015-7-1

End date: 2018-06-30

Services

Please select services for the appointment renewal:

- Supervise or teach residents, fellows, and SMPH students in clinical settings
- Lecturer for residents, fellows, and SMPH students
- Staff a SMPH affiliated volunteer clinic for underserved populations
- Develop and present educational materials or moderate Grand Rounds or M&M conferences that are sponsored by the SMPH.
- Collaborate with SMPH department faculty in funded research
- Provide administrative leadership for UW Health
- Provide leadership in SMPH curriculum development, organization or oversight
- Activity advancing DFM departmental mission

Renew

After determining information to be accurate, click the “Renew” button

- You then have the option to copy additional email addresses to the email. If you do not wish to copy anyone else on the email, simply click the “Renew” button and leave the “(optional) cc” section blank. **Note:** Program coordinators are automatically copied to all emails sent to the volunteer.

Doe, Jane

Contact Jobs Bio Surveys Tags Volunteer HR

(optional) cc:

Renew

9. Selecting "Renew" allows PIMS to send an automated email from Mary Fendry through the dfm.volfaculty@fammed.wisc.edu email address to the volunteer asking them to complete the two attachments (data form and activity form) and provide DFMCH HR with an updated CV. The email is drafted as follows:

Dear **Volunteer Name**:

Thank you for your valuable contributions to the University of Wisconsin School of Medicine and Public Health, Department of Family Medicine and Community Health. We are currently in the process of renewing your appointment that is scheduled to end on June 30, **20XX**.

In order to process your renewal, please collect the following documents:

- Print, review, and sign the Clinical Adjunct Professor Appointment Data Form (attachment_a.pdf).
- Print, review, and sign the Documentation of Clinical Adjunct Professor Activities form (attachment_b.pdf).
- A copy of your current curriculum vitae (CV).

Once you have collected the preceding documents, please fax them to the DFM Human Resources Department's confidential fax line at 608-262-1215. Alternatively, you may also scan and email your packet to dfm.volfaculty@fammed.wisc.edu. Please be aware that email is not considered a secure form of communication.

Sincerely,

Mary Fendry

Human Resources Director
Department of Family Medicine and Community Health
School of Medicine and Public Health
University of Wisconsin-Madison
1100 Delaplaine Court
Madison, Wisconsin 53715

- a. The first attachment is a PDF of a Clinical Adjunct Professor Data Form.
i. The volunteer must sign and date the designated area.

CLINICAL ADJUNCT PROFESSOR APPOINTMENT DATA FORM (ATTACHMENT A)

APPLICANT INFORMATION

APPLICANT NAME: Rajagopalan, Lavanya Nisha

SEX: MALE FEMALE DATE OF BIRTH: [REDACTED]

SOCIAL SECURITY #: [REDACTED]

TITLE: Clinical Adjunct Assistant Professor

SPECIALTY: Family Medicine

BOARD ELIGIBLE/CERTIFIED IN SPECIALTY: NO YES

If yes, date _____

LICENSE #: 45620 STATE: WI

MEDICAL STAFF HOSPITAL AFFILIATION: St. Mary's Hospital Medical Center

EMAIL ADDRESS: kiransmom@yahoo.com

PRACTICE/BUSINESS: GHC Hatchery Hill Clinic

ADDRESS: 3051 Cahill Main (608) 251-4156
Fitchburg, WI 53711 PHONE

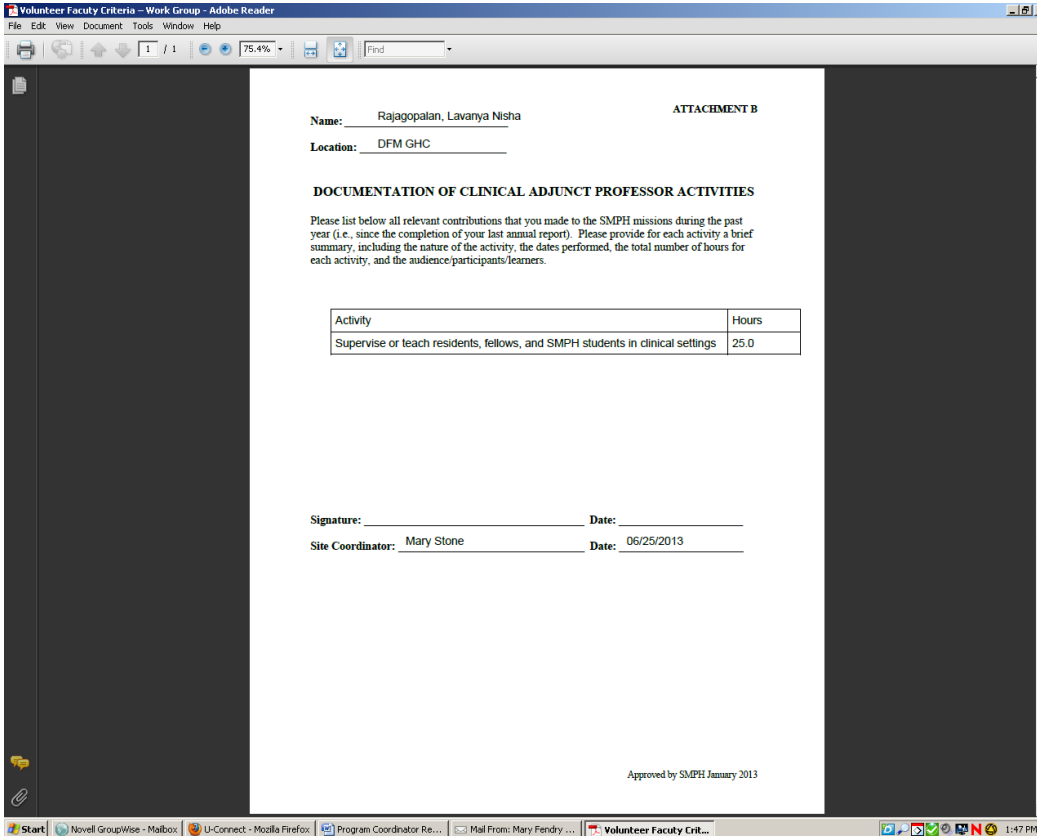
I hereby apply for appointment as a clinical adjunct professor for the Department of Family Medicine in the University of Wisconsin School of Medicine and Public Health (SMPH). I understand such appointments are a privilege and not a right, and that the Chair of the Department of Family Medicine or the Dean of the SMPH have the right to make, deny, or revoke such appointments at their discretion. Submission of this application does not guarantee appointment. I agree to perform and document a minimum of twenty-five (25) hours annually of participation in one or more of the attached activities in order to be approved for appointment or reappointment. If approved, initial appointments will be for one (1) year. Reappointment is contingent upon completion and documentation of annual service activities.

SIGNED: [REDACTED] DATE: [REDACTED]

PLEASE FAX YOUR COMPLETED REQUEST WITH ALL REQUIRED DOCUMENTATION TO THE DFM HUMAN RESOURCES DEPARTMENT AT 608-262-1215

Approved by SMPH January 2013

- b. The second attachment is a PDF of the Clinical Adjunct Professor Activities Form.
 - i. The volunteer must sign and date the designated area.
 - ii. The volunteer should update the information on the activities form if the activities or hours are incorrect.



- c. The volunteer must also send a copy of their updated CV.

10. The volunteer’s status will now appear as “Activity Form”. The status will remain at Activity Form until a renewal is processed or a non-renewal process is started. Once the volunteer has been sitting at Activity Form status for over one month, you will be prompted by the volunteer coordinator to begin the Reminder process. The process for reminders is outlined below in the next section.

11. Once the renewal is processed you will be CC’ed on an e-mail sent to the volunteer from Mary Fendry from the dfm.volfaculty@fammed.wisc.edu address. This e-mail will have the volunteer’s reappointment letter and UWMF Interactions with Industry Policy attached. The e-mail will look like the following:

Dear **Volunteer Name**:

Thank you for your valuable contributions to the University of Wisconsin School of Medicine and Public Health, Department of Family Medicine and Community Health. Attached is your appointment renewal letter from Dr. Valerie Gilchrist.

Please note that the address we have on file for you is:

Address

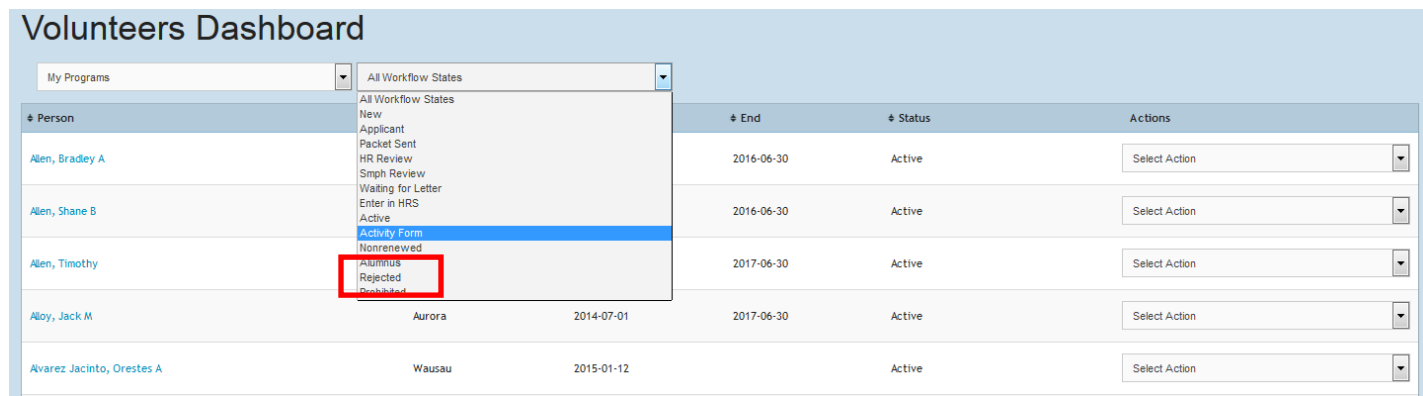
If this address is incorrect, please reply to this email with your correct address, so that we may update our records.

Sincerely,

Mary Fendry
Human Resources Director
Department of Family Medicine and Community Health
School of Medicine and Public Health
University of Wisconsin-Madison
1100 Delaplaine Court
Madison, Wisconsin 53715

Renewal Reminder Process

1. The reminder process will start after you have clicked “Renew” for all eligible volunteers. You will be prompted by the Volunteer Coordinator to begin the renewal reminder process 2 weeks prior to the volunteers’ end date of that given year. The renewal reminder process is used to help remind volunteers to turn in the appropriate forms for their reappointment.
2. Once prompted to begin the process, log into PIMS and click on the “Clinical Adjunct Faculty” button.
3. Enter your Clinical Adjunct Faculty Dashboard and select “Activity Form” from the drop down menu.



- Select "Reminder" from the drop down menu under the Actions column for all volunteers at Activity Form status, unless you have been notified not to or are aware of a special case.

Volunteers Dashboard

My Programs

Person	Program	Begin	End	Status	Actions
Anderson, Scott	OMSE	2015-07-01	2018-06-30	Activity form	Select Action
Bahr, Kelley	OMSE	2015-07-01	2018-06-30	Activity form	Select Action Resend Form Reminder Document Form Cancel Renewal
Baker, Maribeth Hardacre	OMSE	2014-07-01	2017-06-30	Activity form	Select Action
Bassett, Jenifer I	OMSE	2014-07-01	2017-06-30	Activity form	Select Action

- This will send an automated e-mail to the volunteer from you, using the DFM.volfaculty@fammed.wisc.edu email address, reminding them to turn in the necessary documentation for their reappointment. The email will look like the following, with the Clinical Adjunct Professor Data Form and the Clinical Adjunct Professor Activities Form attached:

Dear **Volunteer Name**:

I am sending this email to follow-up on your clinical adjunct faculty appointment with the University of Wisconsin Department of Family Medicine and Community Health. On **Date**, you should have received an email from Mary Fendry, Human Resources Director, asking you to complete and return some documents to our human resources department. These documents have yet to be received, preventing the renewal of your clinical adjunct faculty appointment.

If you would like to continue your clinical adjunct faculty appointment, please collect and return the following documents by **Date (3 months from date email is sent):**

- Print, review, and sign the Clinical Adjunct Professor Appointment Data Form (attachment_a.pdf).
- Print, review, correct (if necessary), and sign the Documentation of Clinical Adjunct Professor Activities form (attachment_b.pdf).
- A copy of your current curriculum vitae (CV).

If you require more time to collect the necessary forms, please let me know and we would be happy to extend the deadline. The collected documents may be faxed to our confidential fax line at 608-262-1215 or scanned and emailed to dfm.volfaculty@fammed.wisc.edu.

If the documents are not received by **Date**, and you have not requested an extension, our human resources department will assume that you are not interested in renewing your appointment which will then be ended. You will need to reapply in the future if your current appointment is allowed to expire.

Please let me know if you have any questions.

Thank you,

Program Coordinator

Program Coordinator

Program Coordinator

Department of Family Medicine and Community Health

- a. You are also allowed to send your own “reminder” e-mail to your volunteers. However please make sure to CC dfm.volfaculty@fammed.wisc.edu so that we are aware of your correspondence.
6. After clicking “Reminder” you will be directed to the volunteer’s personal page. Even though you select “Reminder” the volunteer’s status will remain at “Activity Form”. You can verify that the volunteer was reminded by checking the Workflow on the volunteer’s personal page. If the volunteer has been reminded, please wait at least 3 weeks to use the “Reminder” function in PIMS again.

Active	2015-03-25 10:03am	Kirschbaum, Emily	renew
Activity Form	2015-05-15 2:14pm	Kirschbaum, Emily	reminder
Activity Form	2015-08-20 11:02am	Mccrumb, Michelle L	reminder

Current State	Available Actions
Activity Form	Resend Form Reminder Received Form Cancel Renewal

[Edit Volunteer](#)

Non-Renewal Process

1. If a volunteer does not wish to renew their appointment, you can initiate the non-renewal process.
2. Once logged into PIMS, click on the “Clinical Adjunct Faculty” button, and enter the Clinical Adjunct Faculty Dashboard.
3. Find the volunteer who is non-renewing and go into their individual profile.
4. Under the Workflow section, click on the “Nonrenew” button.

Enter in HRS	2016-01-25 9:43am	Mccrumb, Michelle L	entered
Active	2016-01-25 9:44am	Mccrumb, Michelle L	renew
Activity Form	2016-01-25 9:49am	Mccrumb, Michelle L	received_form

Current State	Available Actions
Active	Renew Nonrenew

5. This will send an automated email to dfm.volfaculty@fammed.wisc.edu notifying the DFMCH Volunteer Coordinator of the non-renewal, as well as to the volunteer. The email to the volunteer will be drafted as follows:

From: Mary Fendry <dfm.volfaculty@fammed.wisc.edu> Sent: Mon 1/25/2016 11:13
 To: imatest@example.com
 Subject: Regarding your Clinical Adjunct Faculty Appointment
 Message nonrenewal_letter.pdf (18 KB)

Dear Dr. Ima Test:


Thank you for your valuable contributions to the University of Wisconsin School of Medicine and Public Health Department of Family Medicine and Community Health. Your Clinical Adjunct Assistant Professor appointment with the Department of Family Medicine and Community Health will be ending on June 30, 2016. Attached is a letter of appreciation from Dr. Valerie Gilchrist.

Sincerely,

Mary Fendry

Human Resources Director
 Department of Family Medicine and Community Health
 School of Medicine and Public Health
 University of Wisconsin-Madison
 1100 Delaplaine Court
 Madison, Wisconsin 53715

- The DFMCH Volunteer Coordinator will process the non-renewal. Once the non-renewal is complete, the volunteer's status will change to "Alumnus" in PIMS. Volunteers with "Alumnus" status will not show up on the general dashboard. To see the volunteers who are at Alumnus status, sort the Clinical Adjunct Faculty dashboard by "Alumnus".

Activity Form	2016-01-25 9:49am	Mccrumb, Michelle L	received_form	
Active	2016-01-25 11:12am	Mccrumb, Michelle L	nonrenew	No longer teaching, per Program Coordinator
Nonrenewed	2016-01-25 11:35am	Mccrumb, Michelle L	appointment_ended	
Current State		Available Actions		
Alumnus		New Appointment		