Coordinator's Checklist to Prepare for the New Academic Year
Recommended Order of Completion

☐ Verify Automatic Advancement for your residents:
  • Next status must be configured: Administration>Local Setup>Status Advancement

☐ Enter new residents/fellows/faculty into database:
  • Import through ERAS: Personnel Data>Tools>Import ERAS Data
  -or-
  • Manual data entry: Personnel Data>Create/Edit/View>Add New Person
  • Check/Edit Advancement path: for multiple records - Personnel Data>Setup>Configure Advancement Information
  • Check/Edit Advancement path: for individual records – Personnel Data>Advancement Information

☐ Build New Academic Year: Administration>Local Setup>Academic Years
  • The academic year defines the intervals and dates of your program's academic year
    o The intervals can be used as a template to build Block Schedules
    o The intervals can be used throughout the suite for generating reports
    o The intervals can define the evaluation periods for Sessions in Evaluations
    o The intervals can define the dates that residents/fellows must signoff on their Duty Hours

☐ Create Block Schedules: Scheduling-Block>Create/Edit>Block Schedule Rotations or use desktop MedScheduler (if already downloaded) under Start>All Programs on your PC
  • Resident/Fellow schedules are typically built using the Academic Year intervals using options one or two on the web
  • Faculty schedules are typically built using option three on the web
    o May also be extended from the previous year (edit last year’s end date to include the new academic year)
  -or-
  • Build both Resident/Fellows and Faculty schedules on the desktop MedScheduler

☐ Duty Hours: It is recommended that all programs use the Rotational Plan for checking Duty Hour rules
  • If using Static Plan: Duty Hours>Rule Configuration>Edit Static Intervals>define intervals for new year
  -or-
  • Change Plan to Rotational: Duty Hours>Setup>Rule Configuration.Rule Execution Plan
  • If using Sign-Off, add intervals from new Primary Academic Year: Duty Hours>Setup>Signoff Configuration

☐ Conferences: Build conference schedule for the new year: Conferences>Manage Conferences>Create New
  • Build new schedule only after you have created all block schedules for new Academic Year

☐ Curriculum: Upload new curriculum files: Curriculum>New
  • Replace curriculum—edit original and insert applicable active dates
  • Archive outdated curriculum
  • Upload new curriculum selecting applicable rotation, status and dates

☐ Questionnaires: Evaluations>Questionnaires>Manage Questionnaires
  • Review for common categories, core competencies and grade scales to enable summarizing results
  • If revising questionnaire: copy the original and make changes to the copy
  • Archive old questionnaires

☐ Sessions: Evaluations>Sessions>Manage Sessions
  • Create sessions for the new year by copying last year’s session and adding new Academic Year intervals
  -or-
  • Create new sessions for the new academic year using Multi-Interval Sessions
  • If questionnaires have been revised, replace them in the copied session prior to matching