MedHub Academic Year Changeover Process

This document describes the appropriate steps required to prepare your program for the next academic year.

The following four steps should be performed by the training program to prepare for the next training year:
1. Terminate or graduate trainees that have either completed training, who are leaving the program or whose contract will not be renewed.
2. Promote existing trainees that will be advancing to their next PGY level.
3. Add incoming trainees.
4. Create next year's Master Rotation Schedule.

Terminating or Graduating Trainees from the Training Program
To acknowledge trainees who are leaving the training program at either the end of the academic year or at any time, the Trainee Termination/Graduation Wizard will you to terminate those trainees from a training program as of the end date displayed (generally the last day of the academic year – 6/30). The program will be able to define the termination date and the reason for termination. The GME Office will receive an alert to approve the termination after the Trainee Termination/Graduation Wizard has been run.

To terminate/graduate trainees, follow these steps:
1. Locate the Task Wizards link on the homepage to find the list of wizards available.
2. Select the Trainee Termination/Graduation Wizard.
3. Using the **batch termination option**, select each trainee leaving the program at the end of the current academic year and go to *Next Step.* Do not terminate those Trainees or fellows who may be extending their current training beyond the academic year. These can either be terminated at a later date or using the individual option.
4. The termination/graduation process has been completed and a termination record has been added to the trainee's training history tab.

Promoting Trainees for the Next Academic Year
To advance trainees to their next PGY level, the Trainee Advancement Wizard promotes trainees to the next level by creating a new appointment record for the next academic year for all trainees remaining in the program. Running the Trainee Advancement Wizard will make trainees available to next year's master rotation schedule so they can be scheduled. You can advance trainees well in advance of the start of the next academic year with no impact on the current year.

To advance trainees, follow these steps:
1. Locate the Task Wizards link on the homepage to find the list of wizards available.
2. Select the Trainee Advancement Wizard.
3. Select either all PGY levels or specific levels where trainees need to be advanced.
4. Verify each trainee checked should be promoted to the next level. Uncheck all boxes next to those trainees that should not be promoted for the next academic year.
5. The trainee advancement has been completed and a new appointment record has been added to the trainee's training history tab.

**Transitioning Trainees from Residency to Fellowship (GME only)
For trainee transitioning from a core residency to Fellowship, GME must create the new appointment record for the next year and move the trainee from their current core residency into the fellowship where they will be training in the coming year.

Please send the names of the trainees moving from a current UMMC residency program to a fellowship to Serena at Serenaroach@umm.edu. If they are coming from a residency in another institution and starting in a fellowship here at UMMC, please upload them using the new resident import in the Task Wizard.

Adding Incoming Trainees
To add trainees to your program:
1. Select the Task Wizards link from the homepage.

2. Select the New Trainee Import.

3. Download the import template to add a list of incoming trainees.

4. Once the import template is complete, save it as a 97-2003 Workbook, return to the task wizard and select the upload template link.

5. After uploading the template, select Next Step. The system will then batch add all of those incoming trainees into your program and add them to the list of existing trainees.

*****If your program uses ERAS, use the MedHub ERAS-Demographics Import in place of the New Trainee Import wizard.*

Creating Next Academic Year's Master Rotation Schedule
In order to populate the master rotation schedule for the next academic year, the rotation block periods for the next year must be created.
To create the next academic year, follow these steps:
1. Locate the Task Wizards link on the homepage to find the list of wizards available.

2. Select the New Schedule Wizard.

3. Select the academic year option for the NEXT academic year.

4. Identify the schedule that needs to be created. For programs with split schedules, they will complete this step until all split schedules have been created.

5. Define the appropriate rotation periods or blocks for next academic year's master rotation schedule. Options are:
• Use the prior year's rotation periods if defined (RECOMMENDED)

• Use standard calendar months

• Custom define your own start/end dates for each rotation period

• Custom add the start dates of each rotation period or block

6. The New Schedule Wizard will display the start and end dates of each rotation period for confirmation. If correct, select *Next Step*.

7. The next step will allow the program to pull over the previous year's service rotations and shifts (recommended). The program also has the option of creating new services and deleting services no longer used after this step.

8. The wizard will display all services and service groups being pulled over for confirmation. Any services that will not be scheduled for or will no longer be used in the next academic year can be deleted in this step as well.

9. After going to the next step, the process has been completed and the services, service groups and any associated shifts/calls, will be pulled over into the Service/Shift Management section for that academic year.

10. To view the next year's master rotation schedule, select the Schedules tab and advance the academic year pull-down menu to the next academic year (MedHub always defaults to the current year). The framework for the new academic year schedule should be in place along with the associated trainees.