

## **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
    - The intervals can be used as a template to build Block Schedules
    - The intervals can be used throughout the suite for generating reports
    - The intervals can define the evaluation periods for Sessions in Evaluations
    - 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
    - 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  - Archive outdated curriculum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