Program Juggling

Managing a GME Team and Multiple Programs

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UPMC MAGEE-WOMENS HOSPITAL

Disclosure Statement

I HAVE NO CONFLICTS OF INTEREST TO DISCLOSE.

Objectives

CREATING A TEAM & ACGME REQUIREMENTS

DIVISION OF LABOR AMONGST STAFF

TRAINING AND TRACKING FOR CONSISTENCY

STAFF RETAINMENT AND COVERAGE

CHELSEA BOOCKS

GME DIRECTOR OF OPERATIONS

DEPARTMENT OF OB/GYN/RS

UPMC MAGEE-WOMENS HOSPITAL

Current OB/GYN/RS GME Team

Chelsea Boocks
GME Director of Operations
Ob/Gyn Residency & GME Staff

Missy Nix
GME Academic Manager
Ob/Gyn Residency

Diana Brucha
Director Emeritus,
Ob/Gyn Residency

Teri Hicks
GME Project Manager
Ob/Gyn Fellowships

Suzi Naumann
Fellowship Coordinator,
REI, MFM, CFP, MIGS

Debi Hotujec
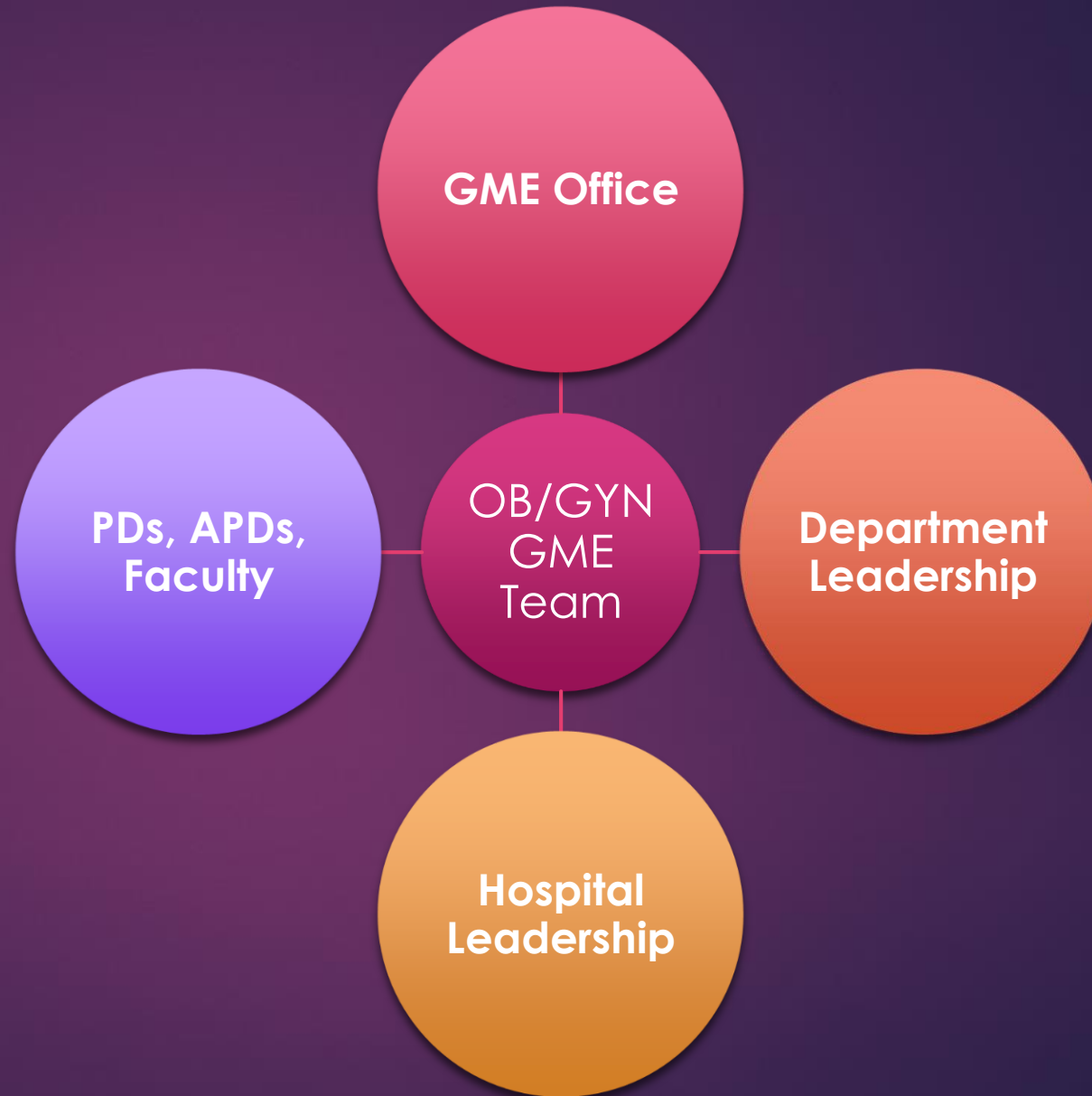Sr. Administrative Assistant,
Gynecologic Oncology

Kelli Lazar
Administrative Supervisor,
Female Pelvic Medicine
& Reconstructive Medicine

Nicole Lang
Administrative Manager,
Laboratory Genetics
& Genomics

External Help

- GME Office
- PDs, APDs, Faculty
- OB/GYN GME Team
- Department Leadership
- Hospital Leadership

Creating A Team

THAT MEETS ACGME PROGRAM COORDINATOR TIME REQUIREMENTS

Program Coordinator Time Requirements

- ▶ Effective 7/1/2022, citable 7/1/2023
- ▶ What is the purpose of these requirements?

The program coordinator is a key member of the leadership team and is critical to the success of the program. As such, the program coordinator must possess skills in leadership and personnel management appropriate to the complexity of the program. Program coordinators are expected to develop in-depth knowledge of the ACGME and Program Requirements, including policies and procedures. Program coordinators assist the program director in meeting accreditation requirements, educational programming, and support of residents.

Requirements Vs. Staffing

Residency

- **1.3 FTE** Minimum Required Support
- Staffing Situation: **2 FTE**

FTE = Full Time Equivalent
1.0 FTE = 1 Full Time Position
0.2 FTE = 1 day/week for AY

Fellowships

- **2.6 FTE** Minimum Required Support
  - MFM = 0.5 FTE
  - CFP, REI, LGG, GynOnc, FPMRS = 0.3 FTE each
  - Non-ACGME Fellowships estimates
- Prior Staffing Situation: **1.6 FTE**
  - **Short by 1.0 FTE (one full time position)**

Prior Fellowship Staffing – Req. NOT Met
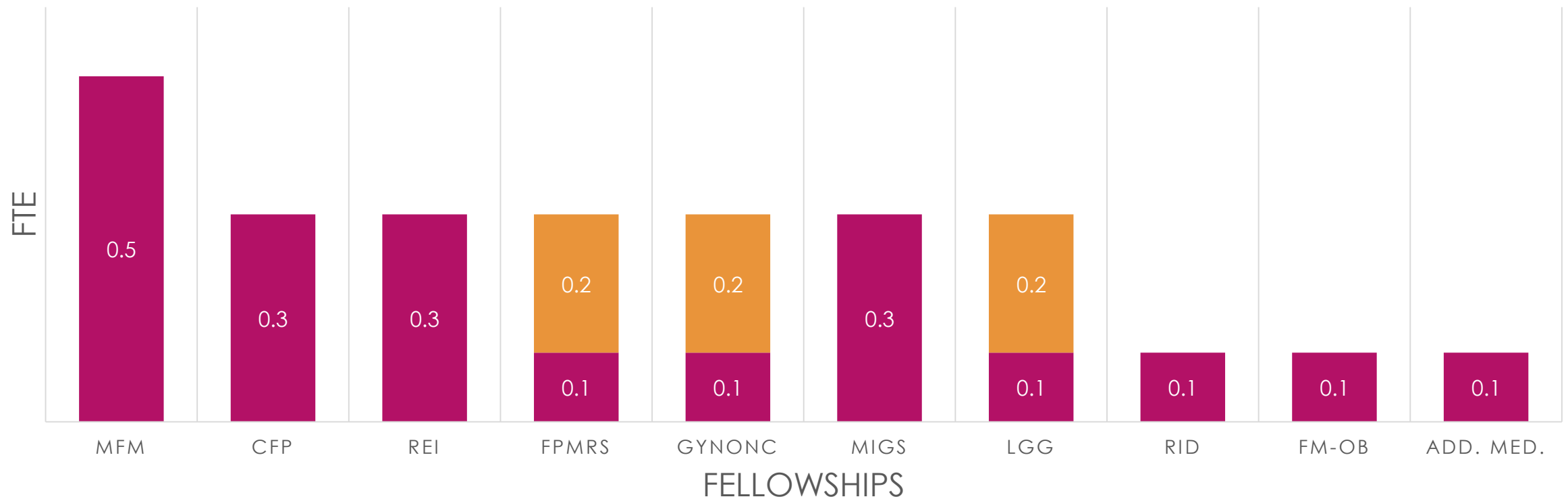
Methods for Meeting Requirements

Incorporating existing staff
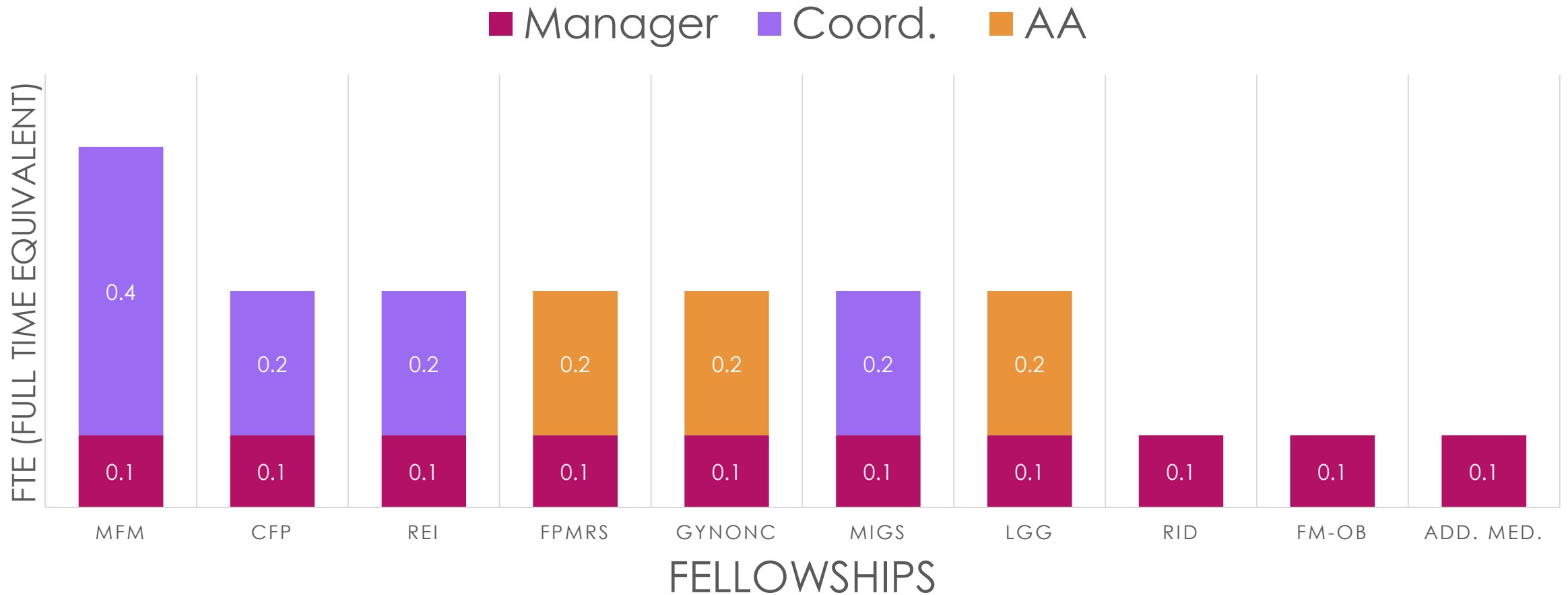
Administrative assistants

Clerkship support

Hiring new staff

Other methods?

Current Fellowship Staffing – Req. Met

Legend: ■ Manager ■ Coord. ■ AA

FTE (FULL TIME EQUIVALENT)

Fellowship	Coord./AA	Manager
MFM	0.4	0.1
CFP	0.2	0.1
REI	0.2	0.1
FPMRS	0.2	0.1
GYNONC	0.2	0.1
MIGS	0.2	0.1
LGG	0.2	0.1
RID		0.1
FM-OB		0.1
ADD. MED.		0.1

FELLOWSHIPS

Division of Labor

Fellowship Tasks

Fellowship Manager

- Onboarding
- License, DEA, Clearance Renewals
- Tuition, Scholarships, Classes
- Expenses
- Evaluations
- Block Diagrams & Rotation Schedules
- Annual Events (Orientation, Graduation, etc.)
- Presentation and Award Tracking
- Website Maintenance
- Work Hour and Absence Management

Fellowship Coordinators & AAs

- Recruiting
- Interviews
- CCC Meetings
- PEC Meetings
- ACGME Annual Update
- ACGME Annual Survey
- Annual Reports for GME Office
- Didactics Schedules and Attendance
- ACGME Case Log Reminders

Residency Tasks

GME Director of Operations

- Onboarding
- Expenses
- Evaluations
- Block Diagrams & Rotation Schedules
- Annual Events (Orientation, Graduation, etc.)
- Presentation and Award Tracking
- Website Maintenance
- Budget Maintenance
- Interviews & Recruitment
- Work Hours and Absence Management

GME Academic Manager

- Didactics & Grand Rounds
  - Attendance Records
  - CME Maintenance
- Alumni Day
- Research Day
- License, DEA, Clearance Renewals
- Moonlighting
- Book funds and reimbursements
- Delinquent Charts
- Faculty Coverage for Special Events

Training and Tracking for Consistency

USING MICROSOFT PLANNER

What is Microsoft Planner?

► **Microsoft Planner**
Part of the Office 365

  ► Allows collaboration on tasks and projects between multiple levels of your organization

  ► Real-time status updates

  ► Interactive hub of Plans and tasks to help keep your program organized

  ► Also accessible via Planner mobile app or via Microsoft Teams app

     ► Main access point is online:
       https://tasks.office.com/
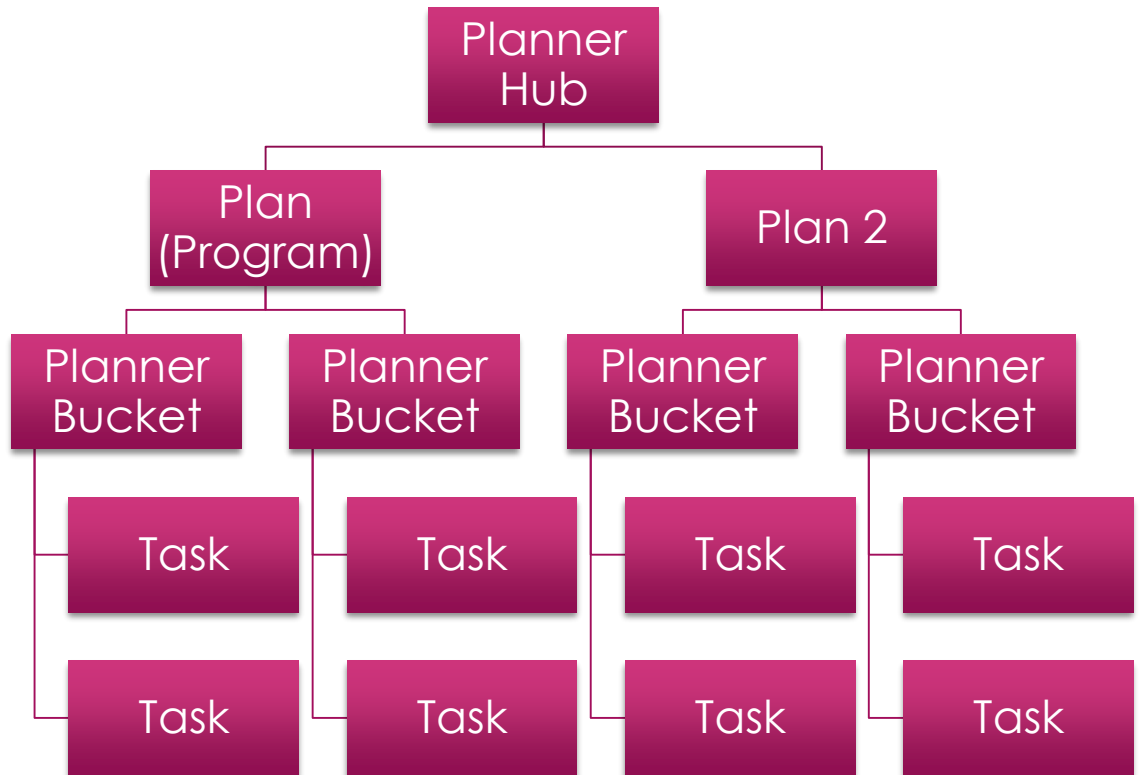
Planner Hub

Left hand tool bar helps you navigate between plans
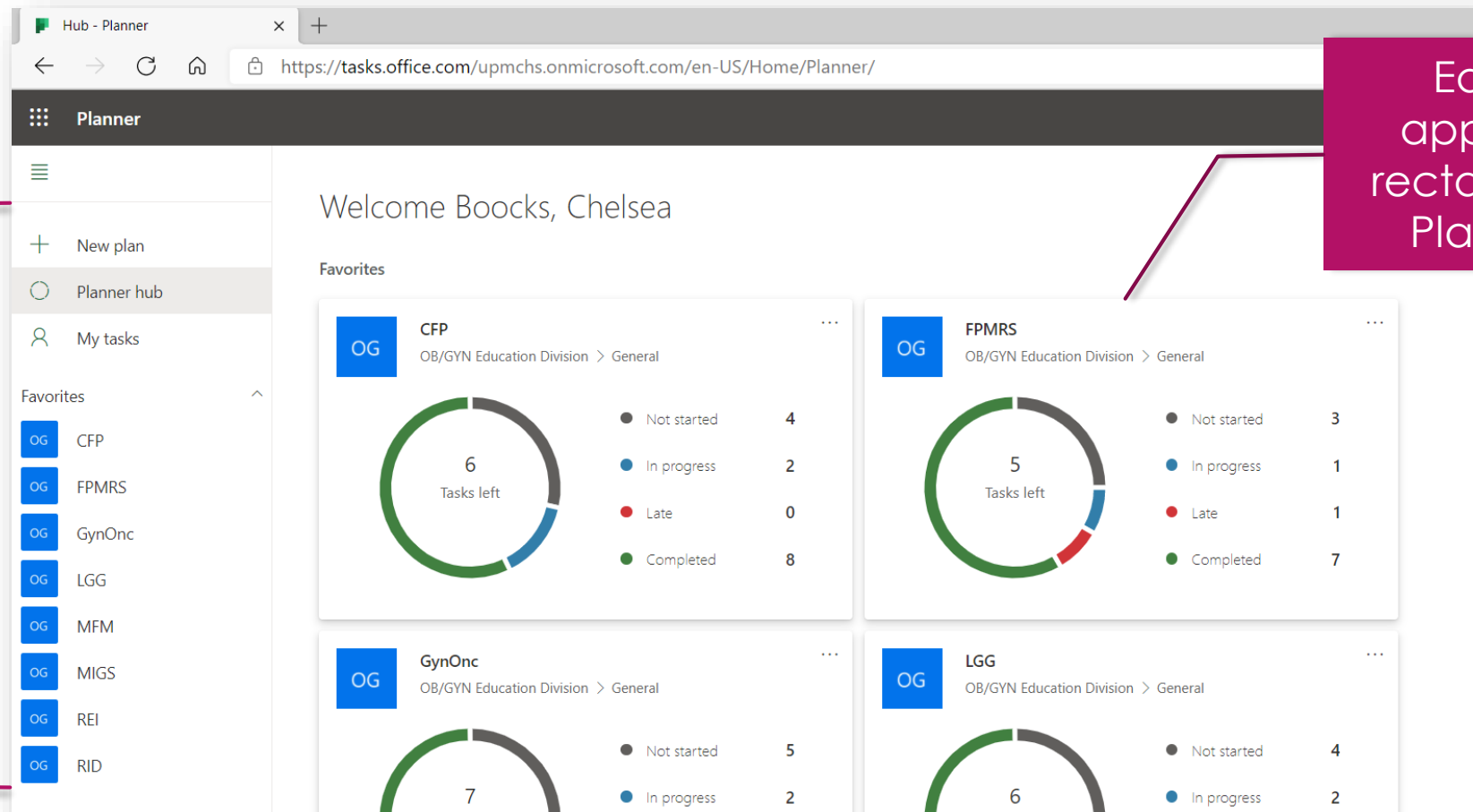
Each Plan appears as a rectangle in the Planner Hub

Inside the Plan

GynOnc ★

Board Charts Schedule ···

CB HK +13 Members ⌄

October Tasks

+ Add task

○ ERAS/NRMP
  ○ Match Day - 10/6/21
  ○ Email Matched fellows' applications & CVs to
  ○ Email post-match survey to non-matched ap
  ⊘ 0/3

○ ACGME Procedure Logs
  ○ Remind fellows to update their procedure lo
  ⊘ 0/1

November Tasks

+ Add task

○ Prepare for CCC Meeting
  ○ Send reminders to complete evals to faculty
  ○ Pull aggregate evals from MedHub
  ○ Upload all relevant evaluations to MedHub
  ○ Email committee members instructions to ac
  ⊘ 0/4

○ Archive ERAS Data
  ○ Save applicant information
  ⊘ 0/1

○ ACGME Procedure Logs
  ○ Remind fellows to update their procedure lo
  ⊘ 0/1

December Tasks

+ Add task

○ CCC Meeting
  ○ Complete minutes for Meeting
  ○ Upload Meeting minutes to MedHub
  ○ Receive milestones from PD for each fellow
  ⊘ 0/3

○ Milestones
  ○ Get milestones from PD after CCC Meeting
  ○ Input Milestone data into WebADS
  ○ Input Milestone data into MedHub
  ⊘ 0/3

○ Semi-Annual Evaluations
  ○ Ensure evaluations completed by PD
  ○ Gather signatures
  ○ Upload to MedHub
  ⊘ 0/3

Each of these columns is called a "Bucket"

Each bucket contains customizable "Task Cards"

Complete Task Button

Task Name

- Copy Task
- Move Task
- Delete Task

Assignee

Basic Task Information

Checklist Items

Attachments

Planner Tasks

MFM

◯ ACGME Survey Reminders

Last changed moments ago by you

NS Naumann, Suzanne

Green ✕

Bucket
February Tasks

Progress
◓ In progress

Priority
❗ Important

Start date
Start anytime

Due date
04/09/2023

Repeat
↻ Does not repeat

Notes   ☐ Show on card

GME wants 100% Submission Rate!

Checklist 2 / 8   ☑ Show on card

✅ Week 1 (2/13 - 2/17)
✅ Week 2 (2/20 - 2/24)
◯ Week 3
◯ Week 4
◯ Week 5
◯ Week6
◯ Week 7 (start involving PDs to enforce completion)
◯ Week 8
◯ Add an item

Attachments

📄 PD Guide to ACGME Survey   ...   ☐ Show on card
   https://upmchs.sharepoint.com/

Add attachment

My Tasks

- "My Tasks" in the main toolbar will display any tasks that have been assigned to you

- Sortable by:
  - Progress (Not started, late, in progress, etc.)
  - Plan Name
  - Due Date
  - Priority

Using Planner for Training

▶ Planner provides new staff with a customizable timeline for each program

▶ Task Attachments

  ▶ Prior years' example documents

  ▶ Cheat Sheet/Training materials

ACGME Annual WebADS Update

Background:

The ACGME Annual WebADS Update occurs in the late summer/early fall and requires program update their ACGME WebADS information. The Fellowship Coordinator and Manager will work together to facilitate the completion of the update by the Program Director, complete specific portions of the update themselves, and ensure all GME and ACGME scheduling deadlines are met.

Resources/Links:

- WebADS Link
- GME 2022 Instructions
- ACGME Scholarly Activity Instructions
- Fellow Scholarly Activity Template
- Faculty Scholarly Activity Template
- PubMed Lookup

Instructions for Manager:

1. Complete "Program Resources" section for Program Coordinator Time for each program.

2. Assist in collecting Scholarly Activity if requested/covering any programs.

3. Assist Coordinators/PDs as requested.

Instructions for Coordinator:

1. Check ACGME WebADS to see when your Annual Update Window (date range). This can be found on the top right corner when you log into WebADS.

✔ **Annual Update Status:**
Jul 18, 2022 - Sep 23, 2022

Using Planner for Tracking

▶ Real-Time Updates

▶ Consistent messaging and documentation across programs

▶ Able to see who completed tasks and when

Plan Creation

▶ In the left toolbar, click "Create a Plan" to generate this pop-up

▶ Name your Plan (I use program names)

▶ Add to your Team (existing Microsoft group)

▶ Adjust privacy settings

New Plan   ✕

Plan name

Add to an existing Microsoft 365 Group

Privacy

◯ Public - Anyone in my organization can see plan contents

⦿ Private - Only members I add can see plan contents

Options ⌃

Group description

Optional group description for new members

Create plan

# Plan Access

▶ Newly-created Plans look rather empty

▶ To add Members, click the "Members" button on the top toolbar

▶ Type the name of your Microsoft Teams member to add them to your team

▶ If you click on the ellipsis next to a Member's name, you can remove them from the plan
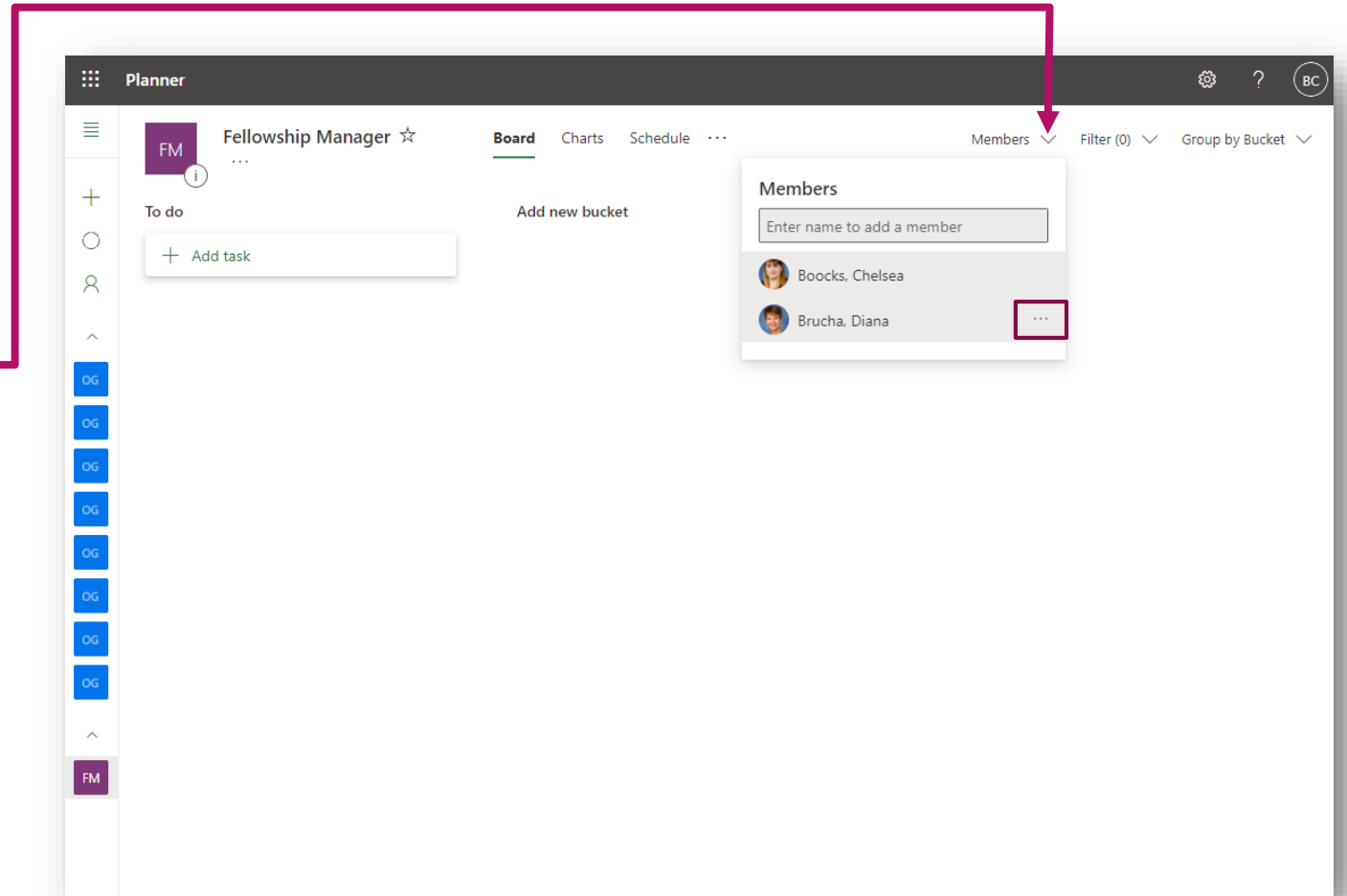
Task Notifications

▶ To alter Task Notifications that are sent to Assignees, click on Settings in the top-right corner and then Notifications

▶ Choose between the following options

  ▶ Send Notification when Someone assigns a task to me (via email, teams, mobile alert)

  ▶ Send Notification when a task assigned to me is late, due, or due in the next 7 days (email only)
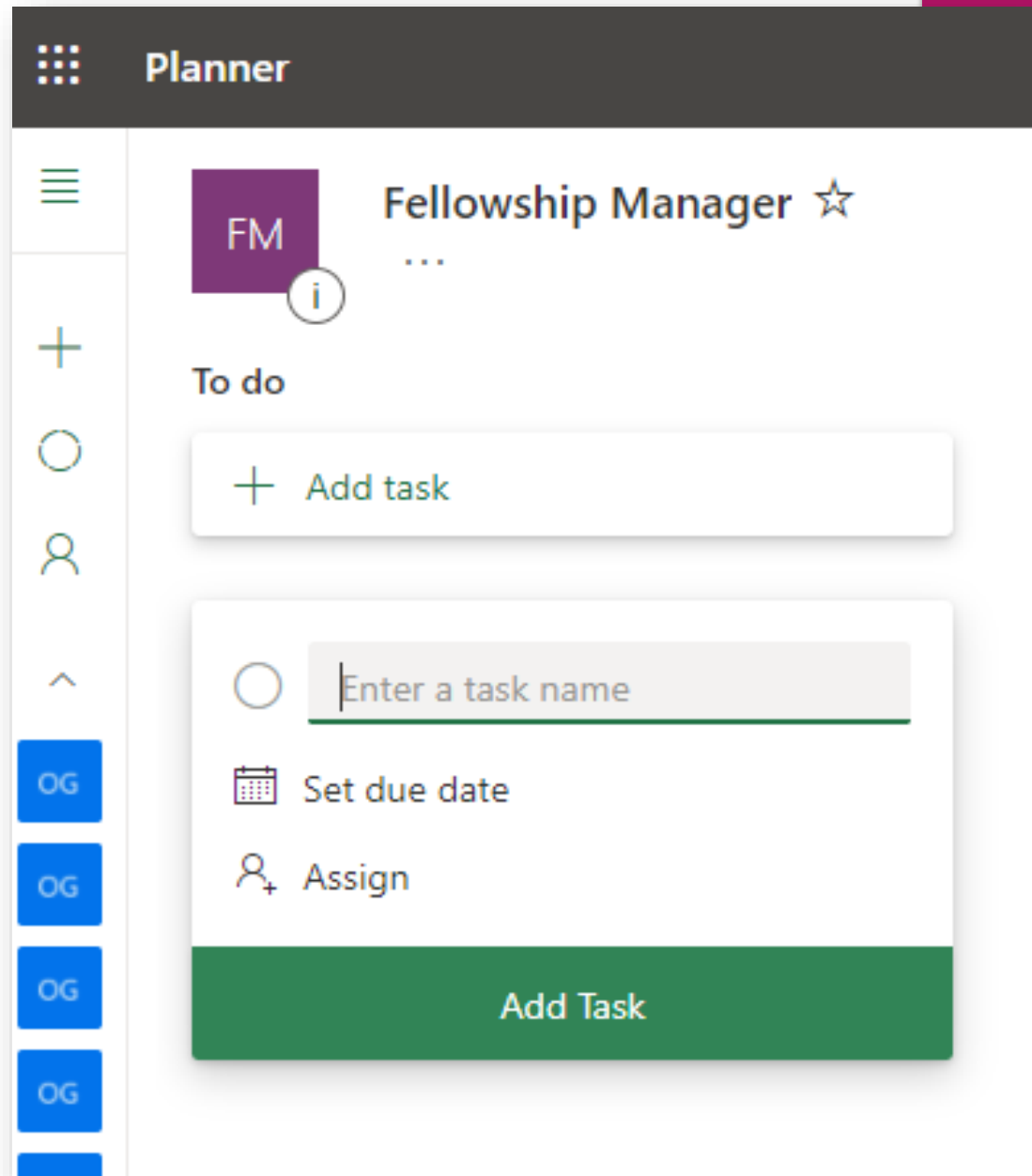
▶ Notifications can be changed for each Plan
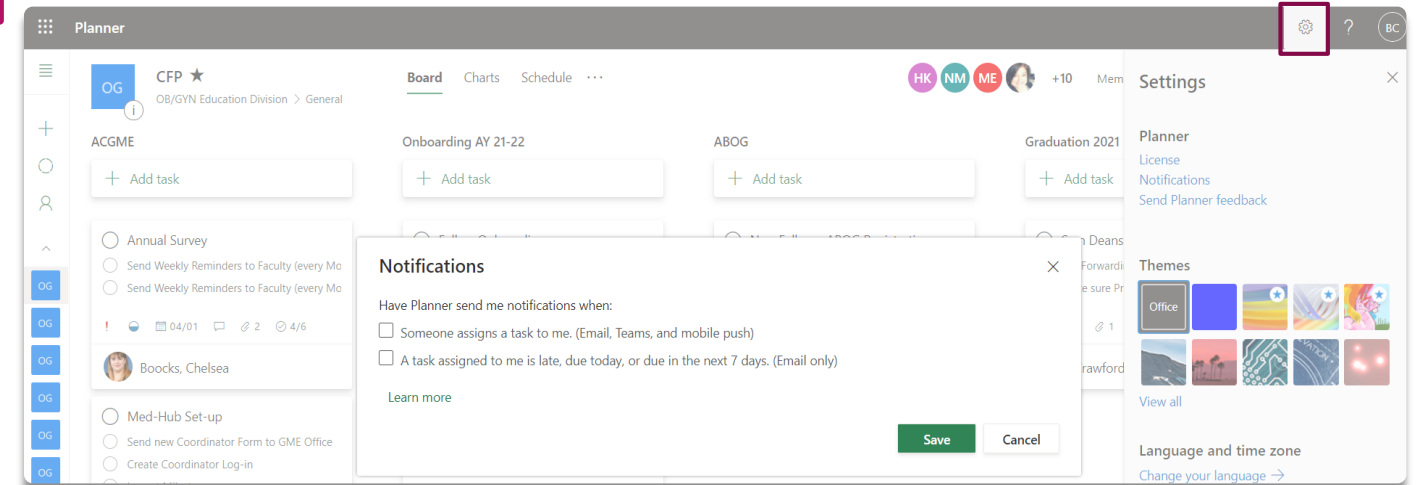
Creating Task Buckets

▶ The first Task Bucket has already been created

▶ The ellipsis to the right of the Task Bucket Name can be used to Rename or Delete the Bucket

▶ The "Add new bucket" button will always re-generate to the right of your other Task Buckets

▶ Drag Task Buckets left or right to organize them
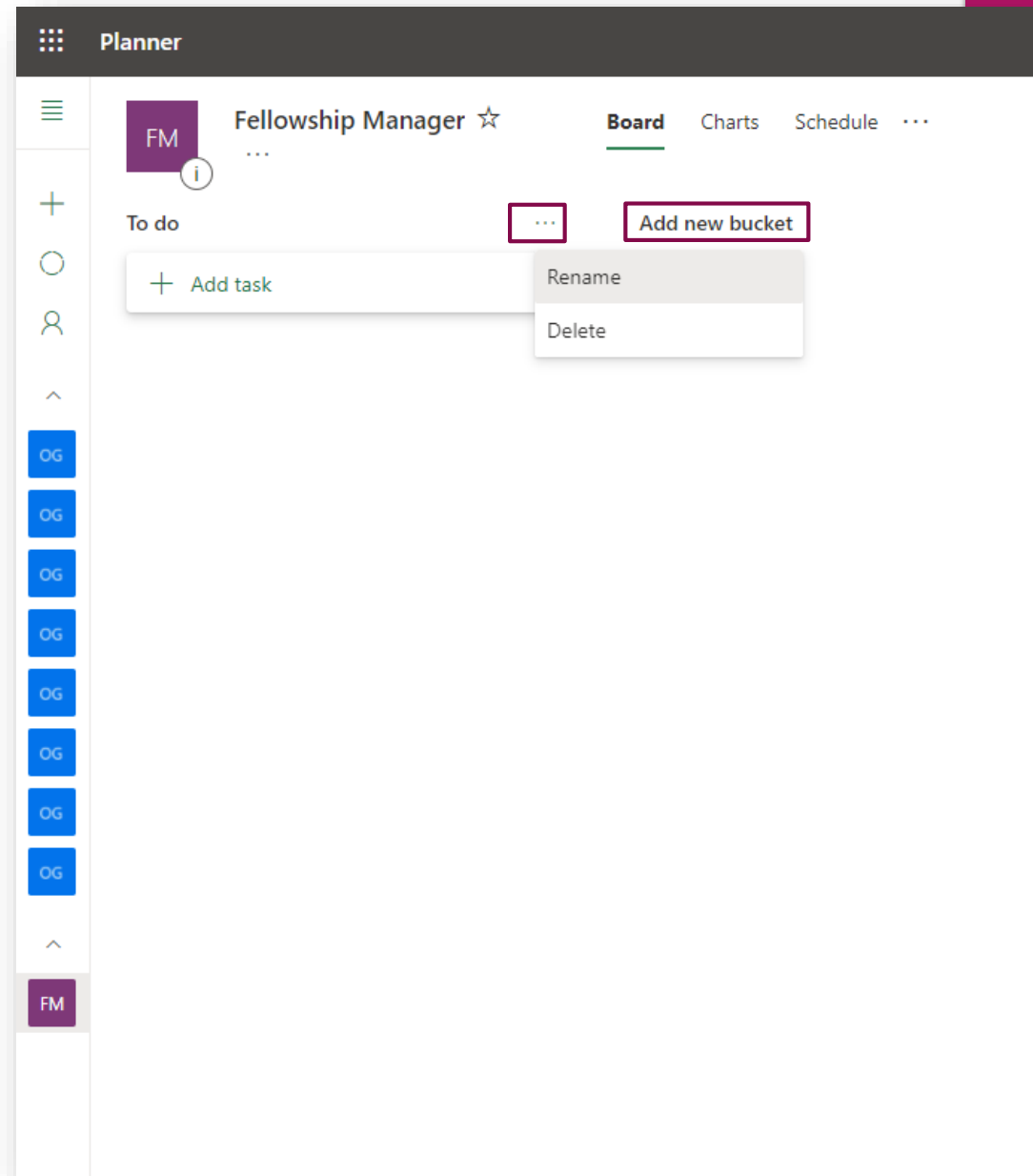
Creating Tasks

- ▶ When you click the "Add Task" button, the Task Card appears
- ▶ From the Plan Screen, you can:
    - ▶ Name the task
    - ▶ Set the due date
    - ▶ Assign the Task
- ▶ Once created, you can click on the Task to edit it

Editing Tasks

CFP

○ **Prepare for CCC Meeting**
Last changed moments ago by you

👤 (NS) Naumann, Suzanne

🏷️ Add label

Bucket	Progress	Priority
April Tasks	○ Not started	● Medium

Start date	Due date	Repeat
Start anytime	04/28/2023	↻ Does not repeat

Notes
Type a description or add notes here

Checklist 0 / 7   ☑ Show on card

○ Send reminders to complete evals to faculty & fellows
○ Pull aggregate evals, work hour reports and didactic attendance from MedHub
○ Pull mytip reports
○ Pull ACGME Case Logs
○ Upload all relevant evaluations, logs to MedHub
○ Email committee members instructions to access evaluations
○ Ask Chelsea for Resident Evals of Fellows
○ Add an item

Attachments

CCC Prep - Pulling Evaluatic ...   ☐ Show on card
https://upmchs.sharepoint.com/

CCC Prep - Scheduling Mee ...   ☐ Show on card
https://upmchs.sharepoint.com/

Add attachment

Comments
Type your message here

Update Task Information

Create/Edit Checklist Items

Add Attachments

Click "Show on Card" to display Item in Plan

Charts

- Each Plan generates four charts
  - Status
  - Bucket
  - Priority
  - Members
- Tasks within these charts are color-coded to reflect project status (Not started, in progress, late, completed)
- The ellipsis allows you to export information to excel and more

Staff Retainment and Coverage

Flexible Schedule

Flexible work from home options

Required In-Office Days: Alumni Day, Research Day, Orientation, Graduation, PEC Meeting, CCC Meetings, Interviews

Opportunities for Professional Development

Project Management & other Certification Courses

LinkedIn Learning Catalogue

ACGME Courses & Workshops

GME-driven Trainings

Conference attendance & presentations

Planner for Emergent Coverage

REAL TIME UPDATES FOR SEAMLESS COVERAGE

ABILITY TO ASSIGN TASKS TO TEAM MEMBERS

Any questions?