



Program Juggling

Managing a GME Team and Multiple Programs

CHELSEA BOOCKS

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 Books
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

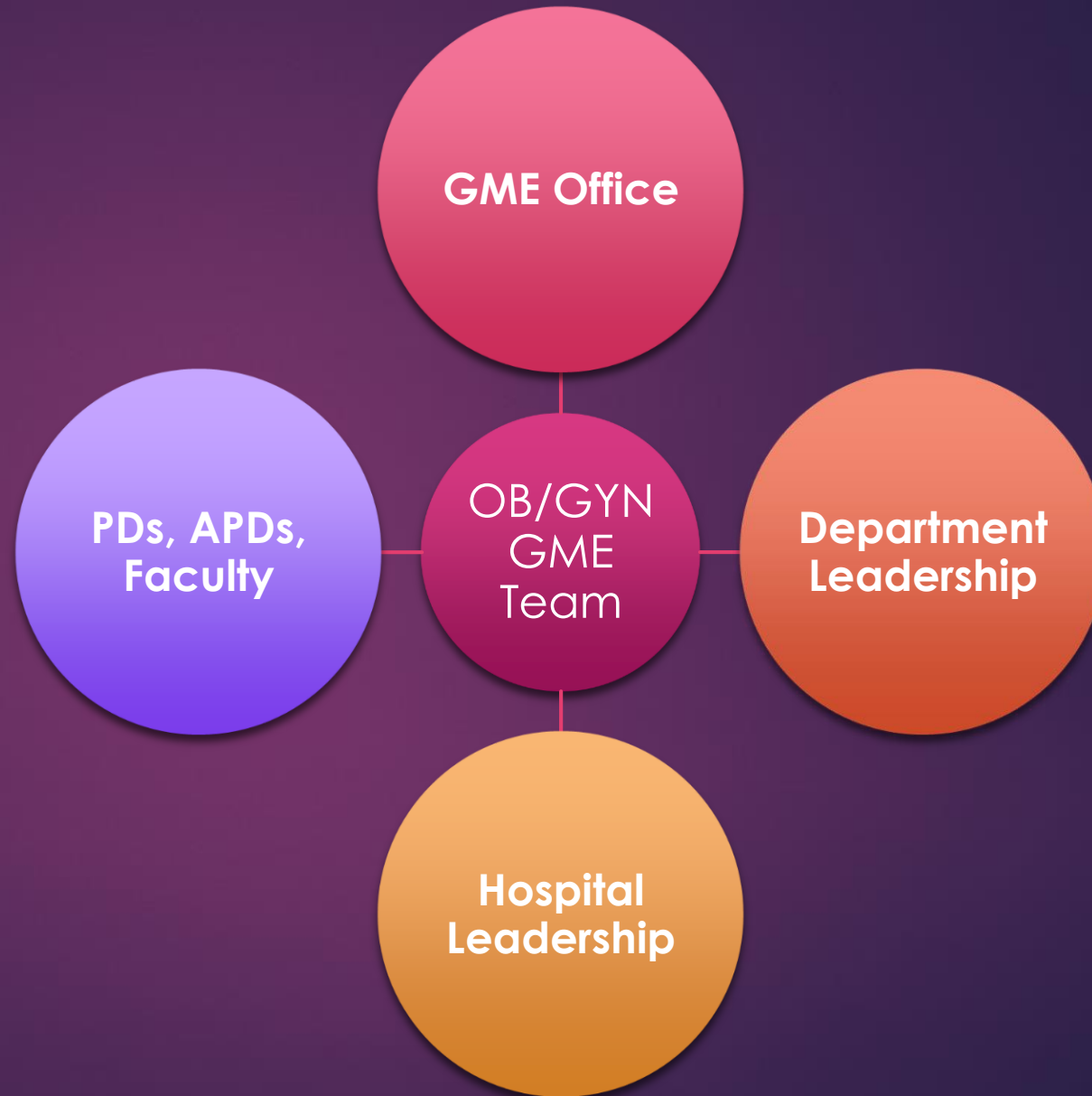


Kelli Lazar
Administrative Supervisor,
Female Pelvic Medicine
& Reconstructive Medicine



Nicole Lang
Administrative Manager,
Laboratory Genetics
& Genomics

External Help





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**

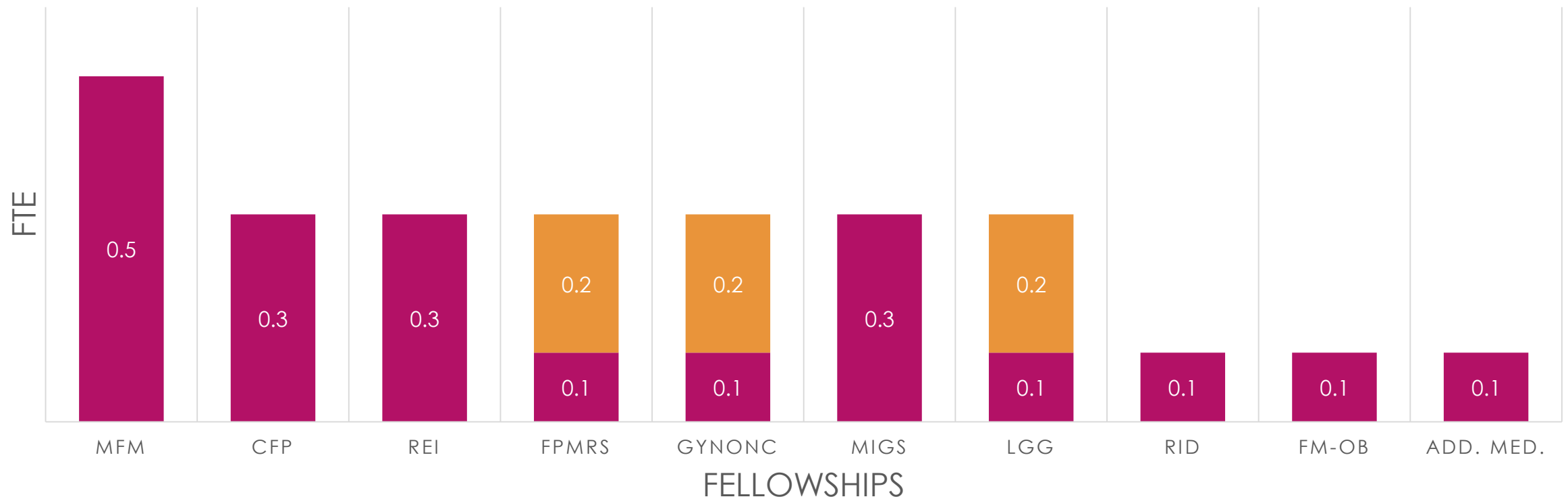
FTE = Full Time Equivalent
1.0 FTE = 1 Full Time Position
0.2 FTE = 1 day/week for AY

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

■ Manager ■ AA



Methods for Meeting Requirements



Incorporating existing staff

Administrative assistants
Clerkship support

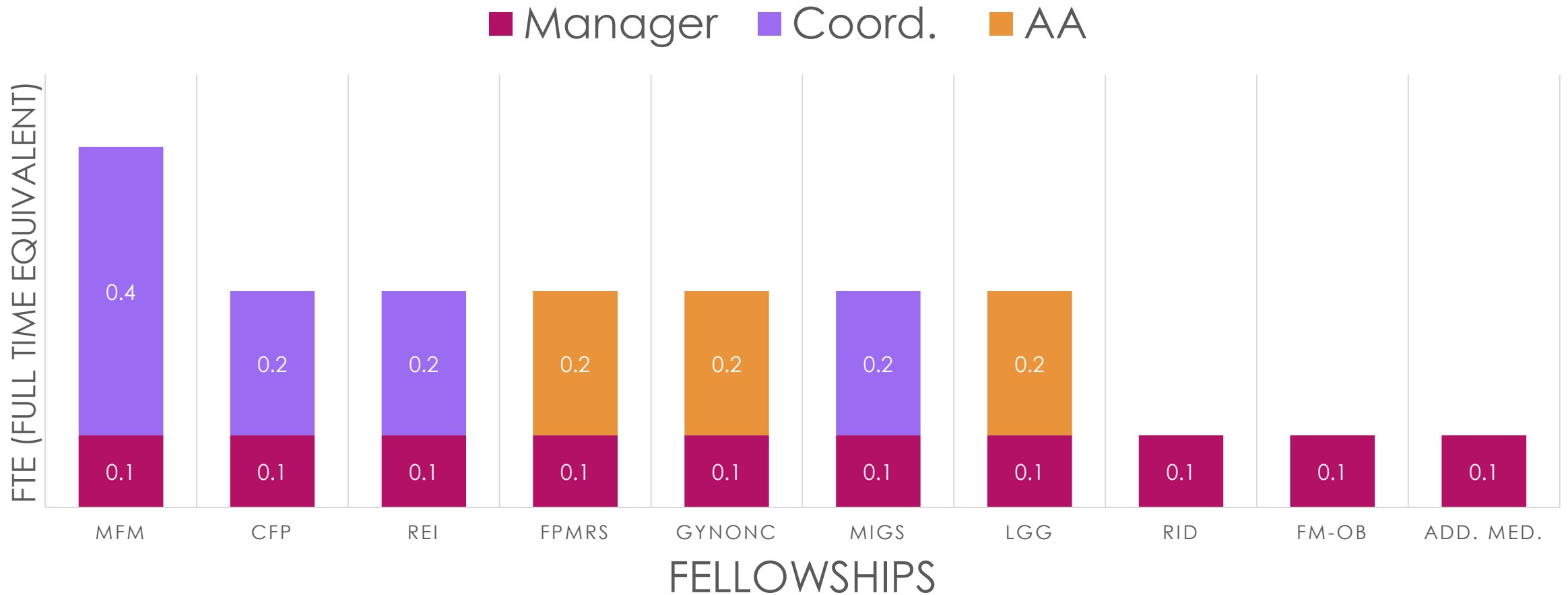


Hiring new staff



Other methods?

Current Fellowship Staffing – Req. Met





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

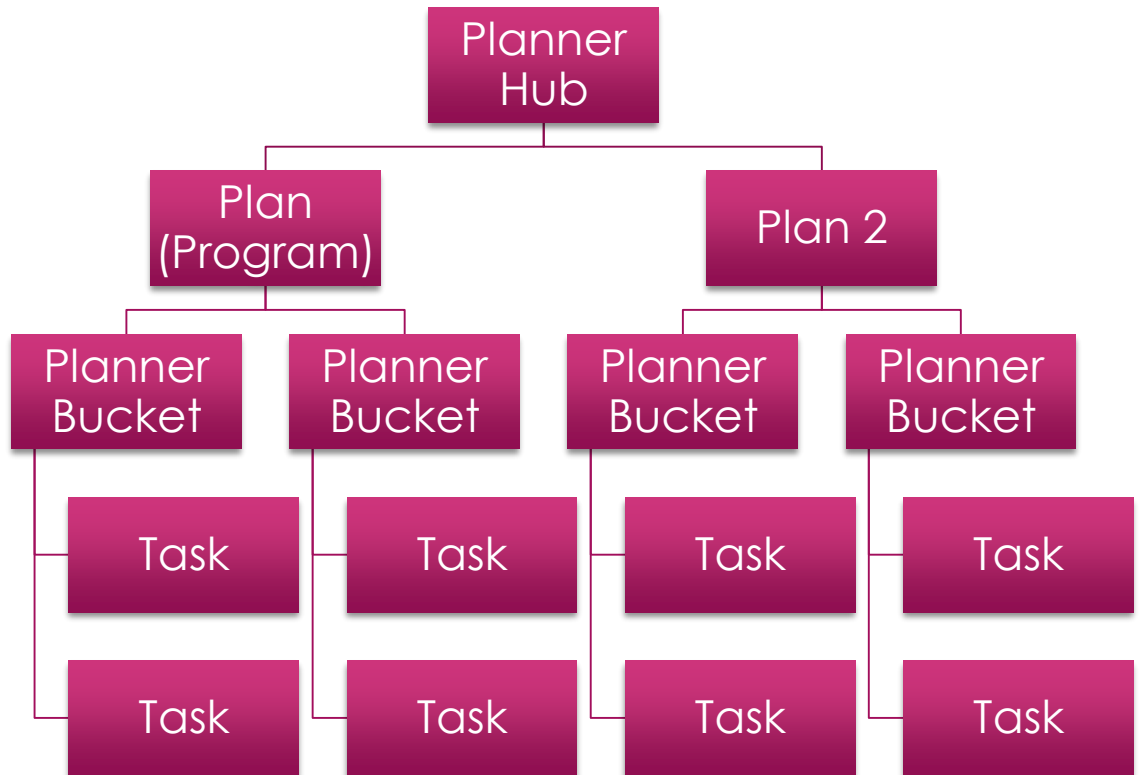
USING MICROSOFT PLANNER

What is Microsoft Planner?

▶ Microsoft Planner

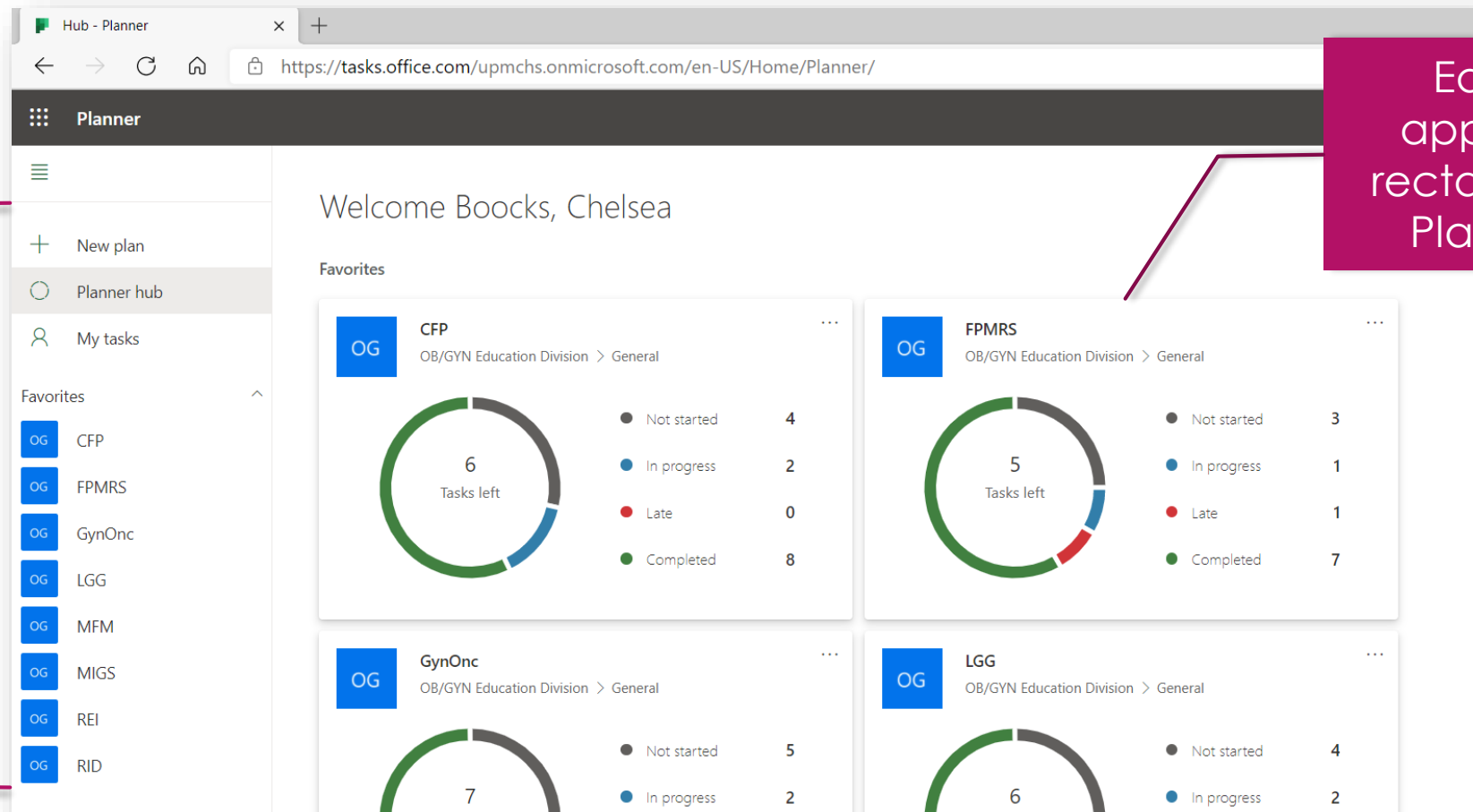
Part of the Office 365

- ▶ 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

The screenshot shows a project management dashboard for 'GynOnc'. At the top, there are navigation tabs for 'Board', 'Charts', and 'Schedule'. The 'Board' tab is active. On the right, there are user avatars for 'CB' and 'HK', and a 'Members' dropdown menu showing '+13' members. The main area is divided into three columns representing months: 'October Tasks', 'November Tasks', and 'December Tasks'. Each column has an 'Add task' button at the top. Below each button are several 'Task Cards'. Each card has a title, a list of sub-tasks with radio buttons, and a progress indicator at the bottom (e.g., '0/3' or '0/4').

October Tasks

- + Add task
- ERAS/NRMP
 - Match Day - 10/6/21
 - Email Matched fellows' applications & CVs to
 - Email post-match survey to non-matched ap0/3
- ACGME Procedure Logs
 - Remind fellows to update their procedure lo0/1

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 ac0/4
- Archive ERAS Data
 - Save applicant information0/1
- ACGME Procedure Logs
 - Remind fellows to update their procedure lo0/1

December Tasks

- + Add task
- CCC Meeting
 - Complete minutes for Meeting
 - Upload Meeting minutes to MedHub
 - Receive milestones from PD for each fellow0/3
- Milestones
 - Get milestones from PD after CCC Meeting
 - Input Milestone data into WebADS
 - Input Milestone data into MedHub0/3
- Semi-Annual Evaluations
 - Ensure evaluations completed by PD
 - Gather signatures
 - Upload to MedHub0/3

Each of these columns is called a "Bucket"

Each bucket contains customizable "Task Cards"

Complete Task Button

Assignee

Basic Task Information

Checklist Items

Attachments

The screenshot shows a task card in Microsoft Planner. At the top, there is a 'Task Name' section with a radio button, the text 'ACGME Survey Reminders', and a subtext 'Last changed moments ago by you'. To the right of the task name is a three-dot menu icon and a close icon. Below the task name is the 'Assignee' section, showing a profile icon and the name 'Naumann, Suzanne'. Underneath is a status bar with a green label 'Green' and a close icon. The 'Basic Task Information' section includes three columns: 'Bucket' (February Tasks), 'Progress' (In progress), and 'Priority' (Important). Below this are 'Start date' (Start anytime) and 'Due date' (04/09/2023). The 'Repeat' section is set to 'Does not repeat'. The 'Notes' section contains the text 'GME wants 100% Submission Rate!' and a 'Show on card' checkbox. The 'Checklist Items' section shows a progress bar for 'Checklist 2 / 8' and a list of items: 'Week 1 (2/13 - 2/17)', 'Week 2 (2/20 - 2/24)', 'Week 3', 'Week 4', 'Week 5', 'Week 6', 'Week 7 (start involving PDs to enforce completion)', 'Week 8', and 'Add an item'. The 'Attachments' section shows a document icon, the text 'PD Guide to ACGME Survey', a URL 'https://upmchs.sharepoint.com', and a 'Show on card' checkbox. At the bottom is an 'Add attachment' button.

Task Name

- Copy Task
- Move Task
- Delete Task

Planner Tasks

Planner

My tasks

Board Charts Schedule ...

Not started

CFP

- Med-Hub Set-up
- Send new Coordinator Form to GME Office
- Create Coordinator Log-in
- Import Milestones
- Import Evaluations (from GynOnc program)
- Link Evaluations and Milestones
- Create Fellow Profiles
- Import Fellow documents
- Create Faculty Profiles/Import from other prc

04/01 0/8

Boocks, Chelsea

REI

- Alexandra Aserlind Onboarding
- REACH Application

0/1

Boocks, Chelsea

MIGS

- Eung-Mi Lee Onboarding
- ICRE Application

0/1

Boocks, Chelsea

MFM

- Send out weekly rotation evals

Boocks, Chelsea

MFM

In progress

CFP

- Annual Survey
- Send Weekly Reminders to Faculty (every Mc
- Send Weekly Reminders to Faculty (every Mc

04/01 2 4/6

Boocks, Chelsea

CFP

- Fellow Onboarding
- PA Medical License
- PA Training License
- DEA (w/PA Address)
- Malpractice Insurance
- Act 33
- Act 34
- Act 73
- Hospital Privileges - Magee
- Hospital Privileges - East
- Hospital Privileges - Passavant

07/01 0/10

Boocks, Chelsea

LGG

- Queue Evals in MedHub
- Update eval schedule
- Queue Evals

1/3

Boocks, Chelsea

Completed

CFP

- Send-out scholarship applications
- Pre-fill application for Samantha Deans
- Pre-fill application for Mack Goldberg
- Pre-fill application for Monica Kao
- Send application to SD
- Send application to MG
- Send application to MK
- Submit application for SD
- Submit application for MG
- Submit application for MG

0/9

Completed by Boocks, Chelsea o...

MIGS

- Schedule Semi-Annual Evals in MedHub

Completed by Boocks, Chelsea o...

CFP

- ACGME Application
- Submit to ACGME 12/1

6/7

Completed by Boocks, Chelsea o...

MFM

- Queue-Evaluations
- Queue Rotation Evals

2/3

Completed by Boocks, Chelsea o...

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

The image shows two side-by-side views of a Microsoft Planner task list. Each view has an 'Add task' button at the top. The left view shows 'Completed tasks' with a count of 2 and an upward arrow. The right view shows 'Completed tasks' with a count of 3 and an upward arrow. Both views list tasks with a green checkmark icon indicating completion. The first task in both is 'Didactics Schedule & Attendance', completed by 'Boocks, Chelsea o...'. The second task in the left view is 'Semi-Annual Evaluations', with sub-tasks: 'Ensure evaluations completed by PD', 'Gather signatures', and 'Upload to MedHub'. The second task in the right view is 'Schedule interviews', with sub-tasks: 'Determine schedule with PD', 'Block clinical calendars', 'Block outlook calendars', and 'Add dates to Schedule (attached & in teams)'. The third task in the right view is 'PLAs', with sub-tasks: 'Review and update PLAs' and 'Notify Manager if any PLAs are due to expire'. Progress indicators at the bottom of each task card show completion counts (e.g., 0/3 for the first task in the left view, 0/4 for the second task in the right view).

ACCESS VIA:
[TASKS.OFFICE.COM](https://tasks.office.com)

Setting Up Planner for Your Program

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

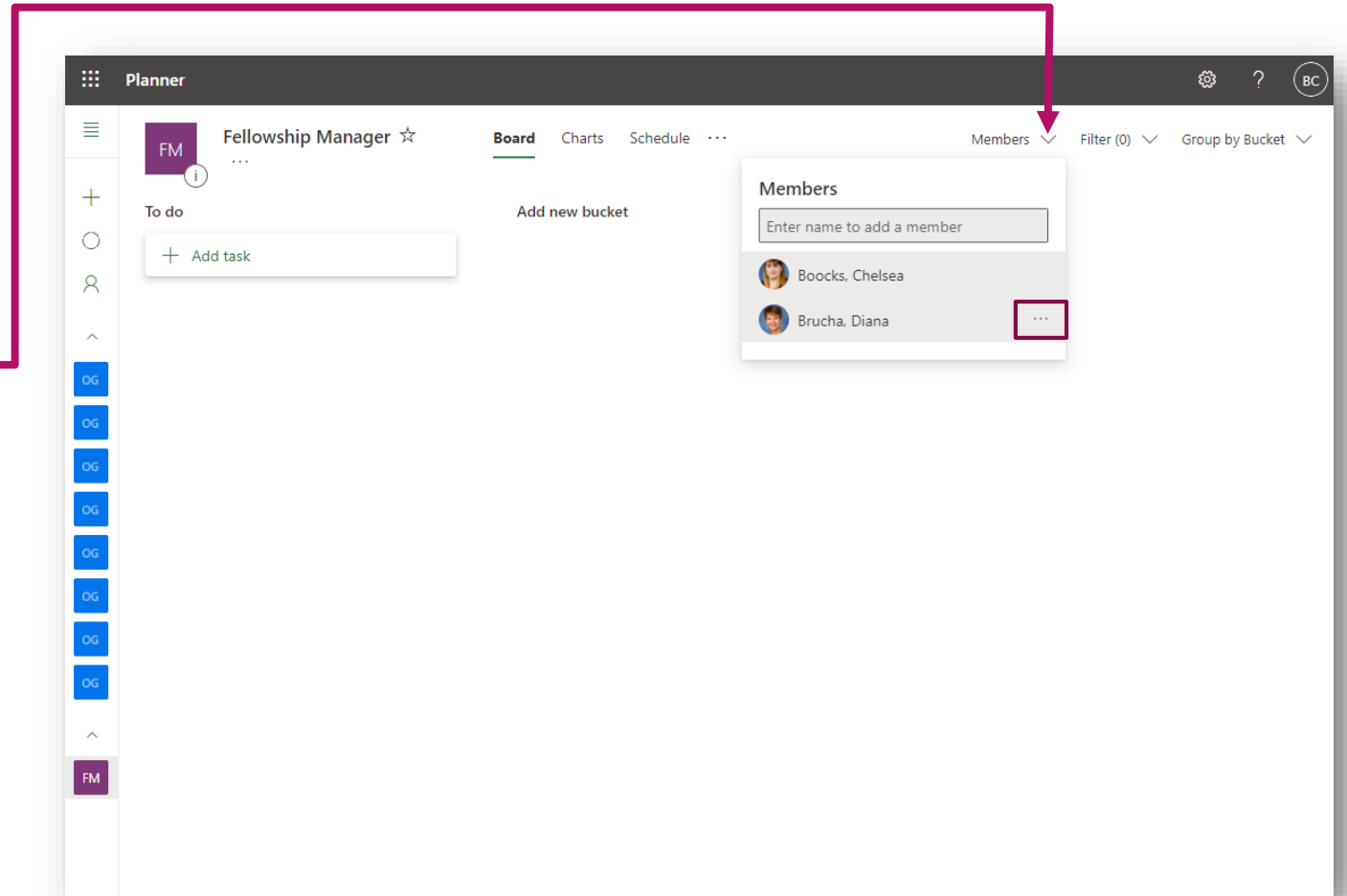
Options ^

Group description

Create plan

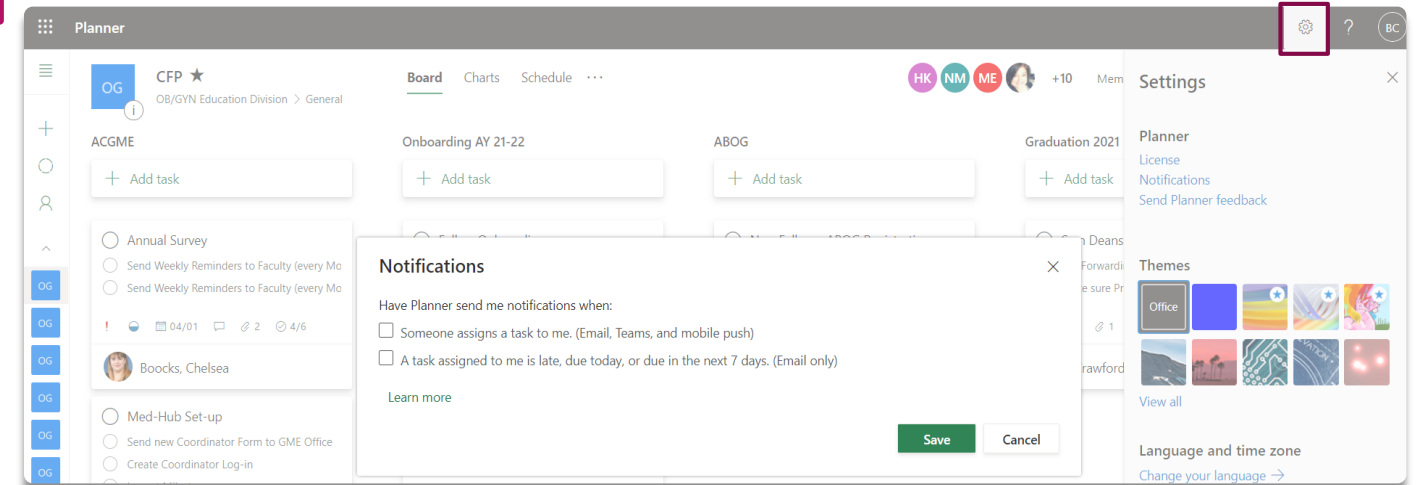
Plan Access

- ▶ 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



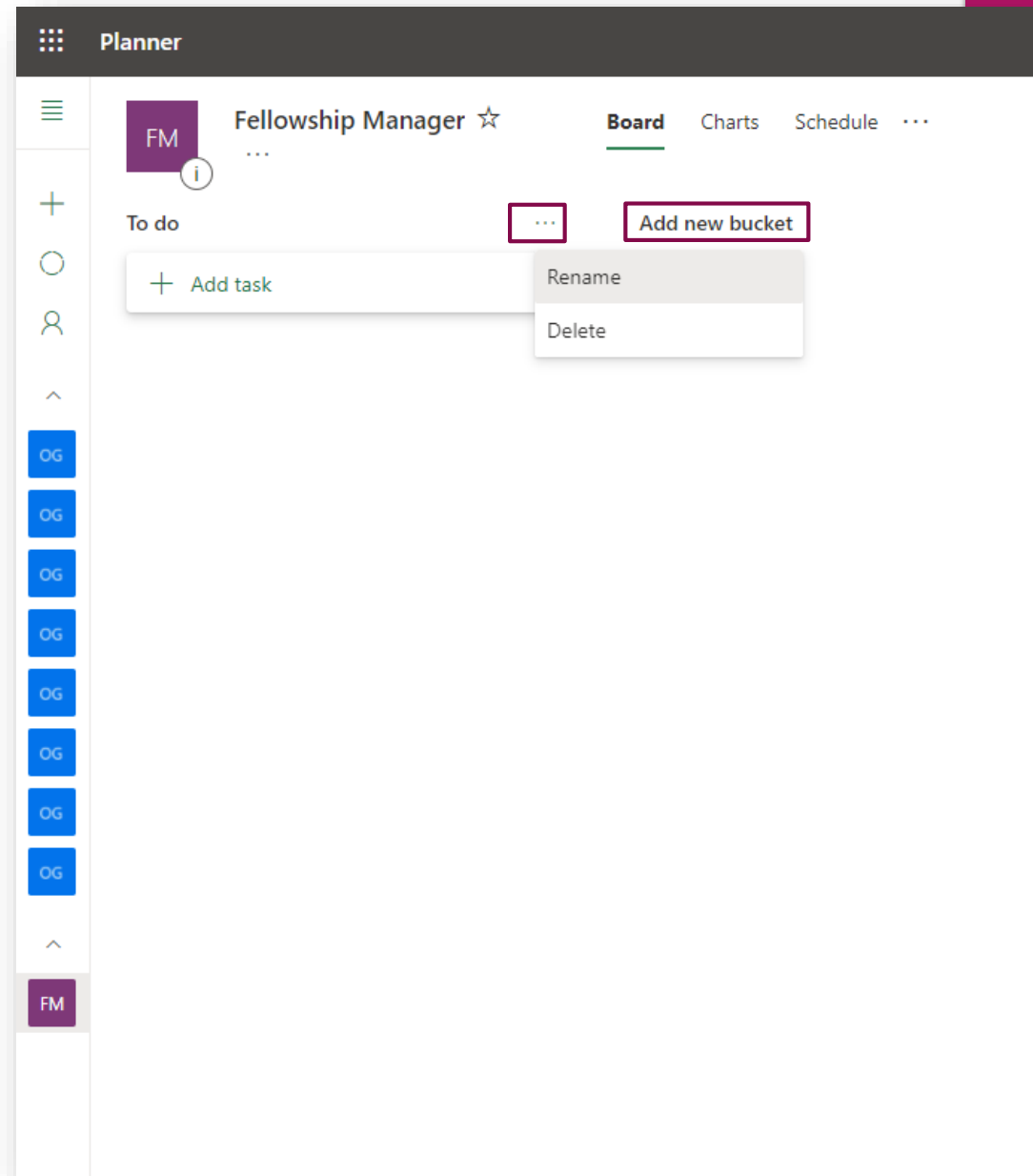
Task Notifications

- ▶ 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



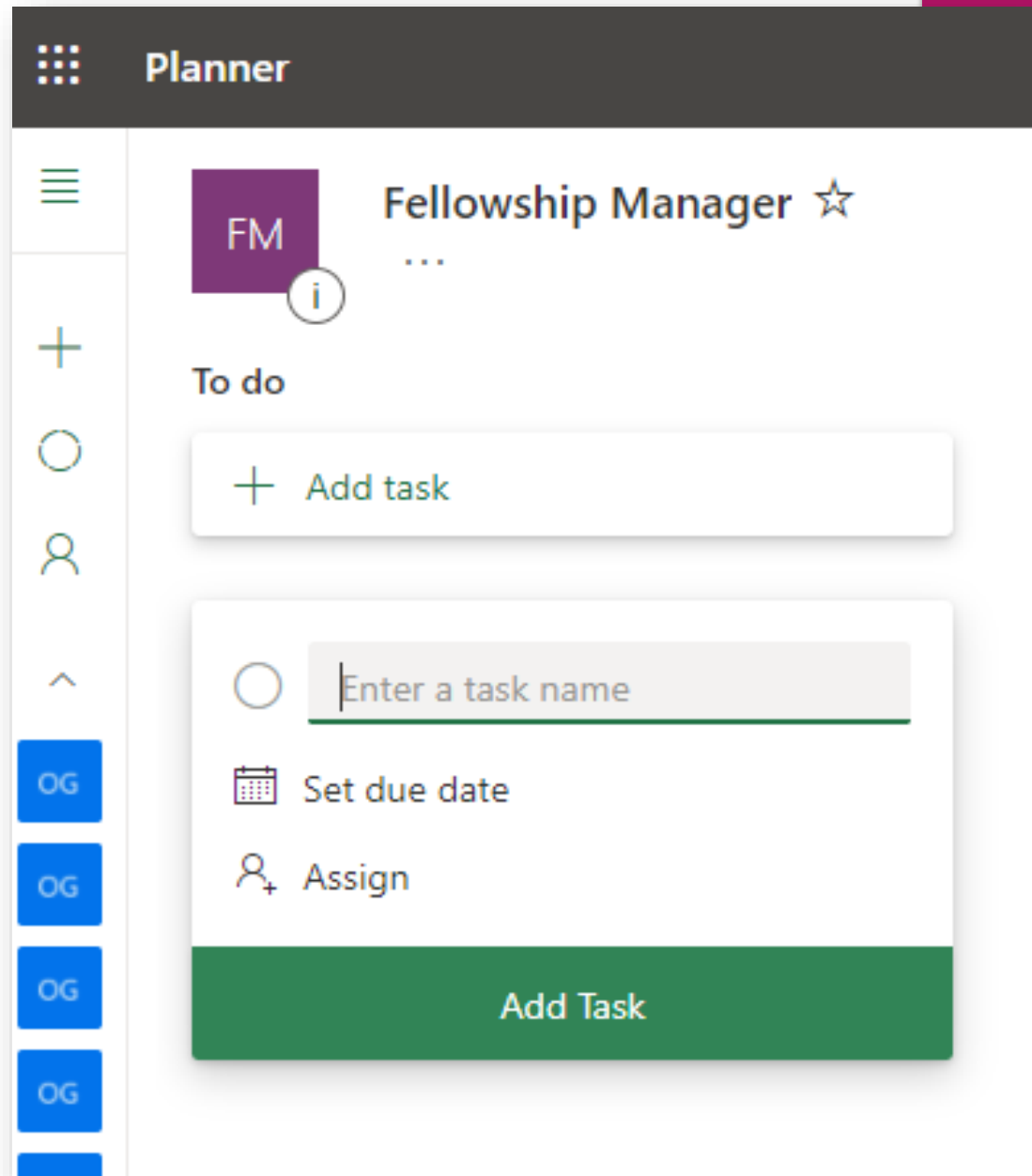
Creating Task Buckets

- ▶ 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

Click "Show on Card" to display Item in Plan

CFP

Prepare for CCC Meeting
Last changed moments ago by you

 NS Naumann, Suzanne

 Add label

Bucket	Progress	Priority
April Tasks	<input type="radio"/> 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

- Send reminders to complete evals to faculty & fellows
- Pull aggregate evals, work hour reports and didactic attendace 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 ...
<https://upmchs.sharepoint.com/>
-  CCC Prep - Scheduling Mee ...
<https://upmchs.sharepoint.com/>

Comments

Type your message here

Update Task Information

Create/Edit Checklist Items

Add Attachments

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 Retainmentment 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?