

TEXAS TECH UNIVERSITY HEALTH SCIENCES CENTER AT EL PASO
Paul L. Foster School of Medicine
GRADUATE MEDICAL EDUCATION
Standard Policy and/or Procedure

TITLE: Onboarding Process for Incoming Trainees Policy

APPROVED: 5/5/2020

REVISED: 8/14/2020; 4/2/2021

EFFECTIVE DATE: 5/5/2020; 8/14/2020; 4/2/2021

PURPOSE: To provide residency and fellowship programs guidance on the process for Onboarding Incoming Trainees. This process takes *approximately 90 days* and in some cases it may take longer.

PROCEDURE:

RECRUITMENT, OFFER DEADLINES, ONBOARDING AND START DATES

On-Cycle: An on-cycle trainee is someone who starts their residency/fellowship training on July 1st.

Recruitment	Offer Deadline	Onboarding Period	Start Date
September – February	ERAS Match Day	April – June	July 1st
Up to March 31 st	March 31 st	April – June	July 1 st

Off-Cycle: An off-cycle trainee is someone who starts their residency/fellowship training after July 1st.

Recruitment Deadline	Offer Deadline	Onboarding Period	Start Date
April 30 th	April 30 th	May – July	August 1 st
May 31 st	May 31 st	June – August	September 1 st
June 30 th	June 30 th	July – September	October 1 st

IMMIGRATION PROCESS (If applicable)

If a trainee requires a **Visa**, the Program Coordinator will email the ELP_Visa@ttuhsc.edu with a ‘cc’ to GME. **Both coordinator and trainee** are responsible for following up on visa status with the immigration office, and for keeping the GME office informed of trainee’s status.

INCOMING TRAINEE DATA FORM

The Incoming Trainee Data Form will initially assist the GME office to obtain trainees’ email address, send the Welcome email, and to prepare AdobeSign documents. Other administrative requirements will be processed by the GME office as indicated *after* the AdobeSign process below.

- 1) For **On-Cycle Fellows**, coordinator will submit the following:
 - a) Completed **Incoming Trainee Data Form** *within two weeks after matching*.
 - b) If the trainee has **previous residency/fellowship training**, coordinator will submit the following documents *by the onboarding deadline (end of May)*
 - i) *Per ACGME-CPRs-III.C (Resident Transfers): The Program Director must obtain verification of previous educational experiences and a summative competency-based performance evaluation prior to acceptance of transferring resident, and Milestones evaluations upon matriculation.*
 - ii) If the trainee is completing or has completed **partial training**, please submit:

- (1) Letter of Credit from the Previous Training Program Director and/or documentation from the American Board of Medical Specialty specifying the total eligible years approved as transferrable to the TTUHSCEP program.
 - iii) If the trainee resigned, please include a copy of the trainee's Letter of Resignation
 - 2) For ***On-Cycle Residents***, coordinator will submit the following:
 - a) Completed ***Incoming Trainee Data Form by April 1st***
 - b) If the trainee has ***previous residency/fellowship training***, coordinator will submit the following documents ***by the onboarding deadline (end of May)***
 - i) *Per ACGME-CPRs-III.C (Resident Transfers): The Program Director must obtain verification of previous educational experiences and a summative competency-based performance evaluation prior to acceptance of transferring resident, and Milestones evaluations upon matriculation.*
 - ii) If the trainee is completing or has completed ***partial training***, please submit:
 - (1) Letter of Credit from the Previous Training Program Director and/or documentation from the American Board of Medical Specialty specifying the total eligible years approved as transferrable to the TTUHSCEP program.
 - iii) If the trainee resigned, please include a copy of the trainee's Letter of Resignation
 - 3) For ***Off-Cycle*** trainees, coordinator will submit the following
 - a) Completed ***Incoming Trainee Data Form within two weeks from acceptance***
 - b) If the trainee has ***previous residency/fellowship training***, coordinator will submit the following documents ***by the onboarding deadline (end of May)***
 - i) *Per ACGME-CPRs-III.C (Resident Transfers): The Program Director must obtain verification of previous educational experiences and a summative competency-based performance evaluation prior to acceptance of transferring resident, and Milestones evaluations upon matriculation.*
 - ii) If the trainee is completing or has completed ***partial training***, please submit:
 - (1) Letter of Credit from the Previous Training Program Director and/or documentation from the American Board of Medical Specialty specifying the total eligible years approved as transferrable to the TTUHSCEP program.
 - iii) If the trainee resigned, please include a copy of the trainee's Letter of Resignation
 - 4) Once the Coordinator submits the corresponding items listed above, the following process will take place:
 - a) GME will prepare the Incoming Master List and University Medical Center (UMC) Clearance List.
 - b) GME will begin emailing the UMC Clearance List to UMC Medical Staff starting by the beginning of May for On-Cycle trainees and as appropriate for Off-Cycle trainees.
 - c) UMC is responsible for assigning its respective Online Orientation Modules to each trainee.

WELCOME EMAIL PROCESS

- 1) GME will send a **Welcome Email** (Alberta Campus) to trainees, with cc to Coordinators, as soon as the Incoming Trainee Data Form and the appropriate documentation are submitted to GME.
- 2) It is the trainee's responsibility to follow instructions and complete all onboarding requirements as provided in the Welcome Email.
- 3) It is equally important for the coordinator to monitor each trainee's compliance.

ADOBESIGN PROCESS

- 1) GME will send required HR and GME documents to each trainee for completion and signatures via AdobeSign.
- 2) AdobeSign will send an email notification to GME, HR, Immigration (*if applicable*) and the Coordinator as soon as the trainee completes all documents.

TEXAS MEDICAL BOARD (TMB) PERMIT PROCESS

- 1) Annually (by the end of March or beginning of April), the TMB will send the GME office instructions and a spreadsheet template to begin the institutional permit process.
- 2) The GME office will, subsequently, submit the completed spreadsheet to the TMB to request each trainee's Personal ID#.
- 3) Once TMB provides the Personal ID#, the GME office will send the number to trainee with information and FAQs on the permit application process.
- 4) As soon as the trainee completes the TMB application and pays the fees, it is the trainee's responsibility to follow-up on his/her permit status.
- 5) The TMB will assign an analyst to review the application.
- 6) The TMB analyst will communicate with the trainee via email for information, clarification, and to request additional information or documents.
- 7) It is highly recommended for each trainee to:
 - a) **Reply to all TMB email requests immediately** to avoid delays in permit processing.
 - b) Follow-up with the TMB frequently (*once a week*) after four weeks of initial TMB application submission.
 - c) Forward correspondence from the TMB, to the program director, coordinator, and GME to keep everyone informed of the status of the application.
 - d) For assistance with questions regarding the **TMB Application, permit process, and/or technical assistance**, the trainee may contact his/her assigned TMB analyst or customer service:
 - i) TMB Customer Service: (512) 305-7030
 - ii) TMB Customer Service E-mail: verifcic@tmb.state.tx.us
 - iii) For further details and overview of the TMB PIT process, please visit: <https://www.tmb.state.tx.us/page/pit-overview>
- 8) If the trainee already holds a current Texas Medical Board License, the above process **will not apply** and trainee must:
 - a) Update the trainee's new training institution, new home address, new training program, and other required updates in their TMB profile.
 - b) Provide a currently updated copy of his/her medical license to the Program Director and Coordinator.
 - c) Upload a copy of the license in MyEvaluations.com – onboarding process is provided below).
- 9) For TTUHSCEP residents that will be changing programs within the institution, the permit process will be handled by the GME office.

MyEVALUATIONS.COM PROCESS

- 1) **ERAS APPLICANTS:** After GME sends the Welcome Email to the trainee(s), the coordinator will import the trainee's **profile** from ERAS to MyEvaluations.com.
- 2) **NON-ERAS APPLICANTS:** After GME sends the Welcome Email, the coordinator will add the trainee(s) in MyEvaluations.com **manually**.
- 3) After the trainee(s) is/are added manually, the trainee will receive an email from MyEvaluations.com.
 - a) It is very important for trainees to **click on the link** provided in the MyEvaluations email to complete the **validation process**.

- b) The Program Coordinator will notify the GME office after validation is complete.
- 4) After trainees have validated their account in MyEvaluations, GME will assign the Onboarding Requirement Groups.
- 5) Once GME assigns the Onboarding Groups, trainees will receive an email from MyEvaluations, which will include instructions on how to proceed with uploading the required documents and complete all onboarding requirements.
- 6) It is each trainee's responsibility to complete all onboarding requirements by the required deadline.
- 7) It is equally important for the coordinator to monitor the trainee's compliance.
- 8) GME will review & verify all onboarding requirements for each trainee.

EPAF and R# PROCESS

- 1) **ON-CYCLE – Electronic Payroll Action Form (ePAF):**
 - a) Coordinator is encouraged to attend **HR Workshops I and II** to start this process.
 - b) Coordinator will submit the:
 - i) **Non-Tech Employee ePAF** by the deadline provided by **HR in Workshop–I**.
 - ii) **New Hire Employee ePAF** by the deadline provided by **HR in Workshop–II**.
- 2) **OFF-CYCLE – Electronic Payroll Action Form (ePAF):**
 - a) Program Coordinator will contact HR for assistance with the ePAF process as soon as possible.
 - b) Coordinator will submit the **Non-Tech Employee ePAF** and **New Hire Employee ePAF** by the deadline provided by HR.
- 3) As soon as the coordinator creates the **Non-Tech ePAF**, an **R#** will be generated.
- 4) The coordinator is responsible for emailing the **R#(s)** to HR and GME.
- 5) GME will use the **R#** to prepare a spreadsheet for IT to start the eRaider Username and TTUHSCEP email account activation process.

ERAIDER USERNAME & EMAIL ACCOUNT ACTIVATION PROCESS

- 1) The **Non-Tech Employee ePAF** submitted by the coordinator **must reach 100% approval level** before IT begins the eRaider Username and email activation process.
- 2) Once the ePAF reaches 100% approval status, IT will send out an email to trainee(s) with instructions on how to create an eRaider account.
- 3) It is the trainee's responsibility to create their eRaider account ***expeditiously***.
- 4) Once trainees create their eRaider account, a TTUHSCEP email address will be generated in the system automatically.
- 5) IT will provide each trainee's eRaider username and email address to the GME Office.
- 6) The GME Office will forward this information to the respective Coordinator.

OFFER LETTERS

- 1. **February:**
 - a. GME notifies Coordinators and sends Offer Letters to ***Matched Fellows*** *by the first week in February (provided the Incoming Trainee Data Form is submitted timely)*.
 - b. GME notifies Coordinators and sends **J-1 *Renewal* Offer Letters** to currently active J-1 Visa Holders *by end of February (provided PD Renewal Authorization Form is submitted timely)*
 - c. **April:** GME notifies Coordinators and sends Offer Letters to ***Matched Incoming Trainees*** *by mid-April (provided Incoming Trainee Data Form is submitted timely)*
- 2. **For Off-Cycle Trainees:**
 - a. GME notifies Coordinator and sends Offer Letters via AdobeSign as soon as the Incoming Trainee Data Form is submitted.

RESIDENT/FELLOW AGREEMENT OF APPOINTMENT (CONTRACT)

- 1) **March:** GME begins sending the *Contract Renewals* to currently active trainees via AdobeSign – Coordinator will be cc'd. *USMLE/COMLEX Step 3 must be passed first* before sending the renewal.
- 2) **May:** GME begins sending the Resident/Fellow Agreement of Appointment **Contracts** to *Incoming Trainees*, via AdobeSign – Coordinator will be cc'd.
- 3) **July:** GME uploads all Resident/Fellow Agreement of Appointment Contracts to MyEvaluations.com
- 4) **For Off-Cycle Trainees:**
 - a) GME notifies Coordinator and sends Resident/Fellow Agreement of Appointment **Contract** via AdobeSign as soon as possible – Coordinator will be cc'd.
 - b) GME uploads the Resident/Fellow Agreement of Appointment Contract to MyEvaluations.com as soon as it's fully executed.

CLEARANCE TO START TRAINING

- 1) GME will email the UMC Clearance Forms to UMC and EPCH Medical Staff.
- 2) The Program Coordinator is responsible for scheduling via email or by calling the designated contact:
 - a) TTUHSCEP EMR (CENTRICITY) by contacting IT at 215-4111, Option 3
 - b) UMC EMR (CERNER) training by contacting Roy Atchison at (O): 544-1200 ext. 41047 or (C) 996-3672
 - c) ACLS / BLS / PALS training by contacting Emergency Medicine at 215-8995
- 3) The Program Coordinator is responsible for sending the completed ID Requisition form and for submitting trainee's state ID and photo (*in jpg format*) to TTUHSCEP Police Department, and UMC Human Resources with 'cc' to GME **by June 1st**.
- 4) The Program Coordinator is responsible for submitting the Professional Liability Information (PLI) in Lubbock's PLI online Enrollment Portal. Coordinators may contact Sheila Robinson (Lubbock), Unit Assist, Dir. 806-743-6412 for guidance. GME will verify completion of this process.
- 5) **OFF-CYCLE or Trainees Not able to Attend Admin In-Processing Day**
 - a) The Program Coordinator is responsible for scheduling an appointment with HR for *eVerification* and *Immigration (if applicable)* at least two weeks prior to start date.
- 6) As soon as the trainee arrives in El Paso:
 - a) **ON-CYCLE**
 - i) Trainee will attend Administrative In-Processing Day (Main or Transmountain Campus)
 - b) **OFF-CYCLE or Trainees Not Able to Attend Admin In-Processing Day**
 - i) Trainee will report to their respective Program Coordinator.
 - ii) Program Coordinator will provide the trainee a copy of the **Admin-In Processing Checklist** and guide trainee on where and how to obtain signatures for onboarding clearance from each office/department.
 - iii) Once trainee(s) obtains signatures, he/she will **submit the signed checklist to their Program Coordinator.**
 - iv) The Program Coordinator will upload the completed Admin In-Processing Checklist in the respective MyEvaluations Onboarding Requirement Group.

COMPLIANCE PROCESS

GME will email the Compliance Office a copy of the CITI Program Report for each trainee.