TITLE: Onboarding Process for Incoming Trainees Policy

APPROVED: 5/5/2020

REVISED: 

EFFECTIVE DATE: 5/5/2020

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:

1. **On Match Day**, programs will fill their positions as part of the recruitment process for Incoming Trainees.
   a. *The Onboarding Process* for Matched Trainees will occur from **April thru June**. The onboarding process takes approximately **90 days or longer**.
   b. **After Match Day**, any *Offer* by the Program Director and *Acceptance* by a candidate must happen **by no later than April 30th** if candidate must start training on **July 1st**.

2. **For Off-Cycle candidates**, the Program Director must start the *Onboarding Process at least 90 days prior to their planned start date*.
   a. An *Offer* by the Program Director and *Acceptance* by a candidate must happen **by no later than July 31st** of any academic year if the candidate is to start training by **October 1st**.

3. Once one of the above processes takes place, the coordinator will submit the following:
   a. Incoming Trainee Data Form
   b. As soon as the coordinator creates the Non-Tech ePAF, an R# will be generated for the trainee.
   c. The coordinator is responsible for emailing the R#(s) to HR and to the GME office as soon as possible.
   d. Verification of Previous Training (*if applicable*)
   e. **After offer takes place**: Onboarding process takes approximately **90 days or longer**

4. GME staff *will use* the Incoming Trainee Data Form to request the trainee’s TMB Personal ID# from the Texas Medical Board (TMB) in order to begin the institutional permit process.
   a. Once TMB sends the Personal ID#, the GME office will send the ID number to trainee with instructions on how to apply for the permit.
b. 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.

c. The TMB will assign an analyst to review the application.

d. The TMB analyst will communicate with trainee via email for information, clarification, and/or to request additional documents.

e. It is highly recommended for trainee to:
   i. **Reply to all TMB email requests immediately** to avoid delays in permit processing.
   ii. Follow-up with the TMB frequently *(once a week).*
   iii. Forward correspondence from the TMB, to the program director, coordinator, and GME to keep everyone informed of the status of the application.

f. For assistance with questions regarding the **TMB Application, permit** process, and/or technical assistance, the trainee must contact his/her assigned TMB analyst or:
   i. **TMB Customer Service:** (512) 305-7030
   ii. **TMB Customer Service E-mail:** verifcic@tmb.state.tx.us

5. 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, Coordinator and GME.
   c. Upload a copy of the license in MyEvaluations.com (more details regarding MyEvaluations.com onboarding process are provided further down on this document).

6. GME staff will use the R#(s) to prepare a spreadsheet with specific information and email it to IT (Diana Ibarra).

7. IT will subsequently begin the eRaider Username and TTUHSCEP Email account activation process.
   a. The ePAF submitted by the coordinator must reach 100% approval before IT can proceed. The coordinator and IT will monitor the status of the ePAF.
   b. Once the ePAF reaches the 100% approval status, IT will send out an eMail to the trainee with instructions on how to create the eRaider account.
   c. It is the trainee’s responsibility to take care of this process expeditiously.
   d. Once the trainee creates an eRaider account a TTUHSCEP email address will be generated in the system.

8. If trainee requires a Visa, coordinator must email to the **ELP_Visa@ttuhsc.edu** with cc to GME staff. **Both coordinator and trainee** are responsible for following up on visa status with the immigration office and for keeping the GME informed of the status.

9. **ON-CYCLE (July 1st) – Electronic Payroll Action Forms (ePAF):**
   a. Coordinator is required to attend **HR Workshops I and II** to start this process.
   b. Coordinator must submit the **Non-Tech Employee ePAF** as indicated by **HR in Workshop – I.**
   c. Coordinator must submit the **New Hire Employee ePAF** as indicated by **HR in Workshop – II.**
10. **OFF-CYCLE – Electronic Payroll Action Forms (ePAF):**
   a. Program Coordinator must **contact HR** for assistance with the ePAF process **as soon as possible**.
   b. Planned start date should be **90 Days** from Program Director Offer.
   c. Coordinator must submit the **Non-Tech Employee ePAF** and **New Hire Employee ePAF** as instructed by HR.

11. GME staff will send a **Welcome Email** to incoming trainee(s), with instructions on the onboarding process and requirements. The coordinator will be cc’d.
   a. It is the trainee’s responsibility to follow the instructions and complete all tasks and requirements.
   b. It is the coordinators’ responsibility to monitor the trainee’s compliance.

12. GME staff will use the Incoming Trainee Data Form to set-up trainee in AdobeSign.
   a. The trainee will subsequently receive an email *(from AdobeSign)* for completion of documents.
   b. AdobeSign will send an email notification to GME, HR, Immigration *(if applicable)* and Coordinator when trainee completes all documents.

13. The Program Coordinator is responsible for:
   a. Scheduling an appointment with HR for **eVerification** and **Immigration** *(for Off-Cycle)*
   b. Scheduling ACLS / BLS / PALS training, as applicable | Contact: 215-8995
   c. Scheduling TTUHSCEP EMR (CENTRICITY) training | Contact: 215-4111, Option 3
   d. Scheduling UMC (CERNER) EMR training | Contact: Roy Atchison, RN 996-3672
   e. Preparing the ID Requisition form, and for submitting trainee’s state ID and photo *(in jpg format)* to both TTUHSCEP Police Department and UMC Human Resources with ‘cc’ to GME staff.
   f. Submitting the Professional Liability Information (PLI) form to the Credentialing Office in Lubbock *(credentialing@ttuhsc.edu)*.

14. **ERAS APPLICANTS:** **After GME sends the Welcome Email** to incoming trainee, coordinator will import trainee’s **profile from ERAS** to MyEvaluations.com.

15. **NON-ERAS APPLICANTS:** **After GME sends the Welcome Email** to trainee, the coordinator will add trainee in MyEvaluations.com manually

16. After the trainee is imported or added in MyEvaluations, the trainee will receive an email from MyEvaluations.com.
   a. **Important!** The trainee **must click on the link** provided in the email to complete the **validation process**.
   b. The Program Coordinator will notify the GME office immediately after validation is complete.

17. After the trainee’s account has been validated in MyEvaluations.com, GME staff will assign the Onboarding Requirement Groups.
18. Once GME assigns the Onboarding Groups, the trainee will receive an email from MyEvaluations, which will include instructions on how to proceed with uploading the required documents and complete all onboarding requirements.

19. It is the trainee’s responsibility to upload all required documents and complete all onboarding requirements in MyEvaluations.com as indicated instructions provided.

20. It is the coordinator’s responsibility to monitor the trainee’s completion of all onboarding requirements, which includes compliance with the Occupational Health Office immunization requirements.

21. GME staff (on a weekly/daily basis) will:
   a. Review & verify all onboarding requirement groups for each trainee
   b. Verify all uploaded documents to assure they are acceptable for clearance
   c. Verify that all online modules have been reviewed and completed by trainee
   d. Verify that trainee has uploaded the appropriate online module Certificates

22. GME staff will email the UMC Pre-Clearance Form to UMC (David Rayas & Yvonne Acosta) and EPCH (Carlos Chavez) on a weekly/daily basis to confirm clearance status.

23. As soon as the trainee arrives in El Paso:
   a. Trainee will report to their respective Program Coordinator
   b. Program Coordinator will provide the trainee a copy of the Admin-In Processing Checklist and guide trainee on how to use the checklist to obtain clearance from each office.
   c. Trainee will use the Administrative In-Processing Checklist to obtain clearance and signatures from all listed departments and report to the GME office as the final stop.

24. GME staff will email the Compliance Office to provide a copy of the Incoming Trainee list and CITI Program Report for each trainee.