Training Affidavits and Adding/Maintaining Residents/Fellows

Webinar held on May 23, 2023 at 3 p.m. CT

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DD – Dr. Deana Dynis
AR – Andrea Rankin
CD – Candace Da Silva
SM – Stefani Martinez

DD: Thank you for being a participant in our first in a webinar series to better equip all of our stakeholders here at ABOG with the information you need to know. Today's webinar is for our Program Directors and Managers to help you navigate the portal and address some of the tasks that will be coming for you here very quickly.

Your hosts today are Candace Da Silva, one of our Exam Administrators, Stefani Martinez, also an Exam Administrator, and these are the two ladies you'll be speaking to the most should you call the ABOG office. They are very knowledgeable and competent, and we wanted to give them a face for the voices that I'm sure many of you hear very often. I'm Deana Dynis. I'm the Director of Assessment Development and Delivery, and then we also have on our call Andrea Rankin, Director of Certification Standards.

Really quickly, we want to make sure that you know that the chat functionality is disabled. However, you can drop questions into the Q&A box, and at the end of the webinar, we will go to the questions and begin to answer them in the order that they were submitted. There will also be some opportunities to submit additional questions there at the end. So with that, I'm going to turn it over to Ms. Rankin, who's going to review our agenda for today.

AR: Thank you, Deana. Today we're going to look at the Program Director/Program Manager portals, the different views. We'll also show you a view of what your resident/fellows see when

they look at their portal. We're going to walk through how to add and maintain residents and fellows, how to promote your residents or fellows, the steps for the training verification, and then we will get to questions and answers. And then at the end, we'd love any feedbacks or suggestions on potential webinars you'd like us to do in the future, or any questions you'd like us to make sure and do more in depth. I'll turn it over to who's starting.

CD: I can take that, Andrea. Thank you so much, and a warm welcome to everyone on the webinar. I just want to say a special shout out to all those program admins that help provide feedback to help inform the webinar today.

If you've ever wondered what your trainee sees when they log into their dashboard, this is an example of a fourth-year resident landing page, so when they log in. As we all know, the dashboard is very task-oriented, and here we can see for this individual that they have a task in bright red. This usually occurs when the deadline is approaching, and this task is indicating that they still need to schedule their seat at a Pearson VUE location. You'll also notice that they have an upload FLS task. We'll talk more about EMIGS and how those get to us a little bit later in the presentation. It is preferable to have the physician click on this task and use it to upload their documentation that they've completed this surgical skills requirement for FLS, and so once they click on that pending task, there will be a separate drop down menu or box where they could drag and drop the document, and it goes immediately into task queue so that we can review.

As for name changes, that should also be completed by the physician. So, they can go online to one of our name change request forms, and once they complete that form, it's pretty quick and easy. They can also upload supporting documentation like a marriage license or their driver's license with the updated name on there.

Let's see how you can update your trainee information.

What you see here is an example of the Program Manager portal, and they can find the add or maintain residents tasks under the Administrative Tasks. There's also a little checkbox to view all tasks. You should click this. It's really helpful if you need to get updates and not just see pending tests.

What you see here once you click on that task, there's going to be a list of trainees. For this example, we'll do a list of residents. So what you will usually see on this page are program years, training dates, the FLS status, as well as the QE application status. And so if you want to update or make changes to an active resident, you would just click on the edit button next to that individual's name.

You'll be brought to a page that looks like this. So again, you won't be able to update the name or change the email. A candidate should be able to update their preferred email address by going into their personal portal under profile and updating that information. And we always strongly encourage that they use an email address that they're going to be checking routinely. We've had issues where sometimes notifications go to an email address that they no longer use, and we want to make sure that they're getting timely updates. You'll also see the current program year. Again, that's not something the program admins can change. You'll see the FLS status. We update that on our end, but what you can change is the start date and the expected completion date. There's also a drop down menu to check whether this individual is active, transferred, withdrawn, or terminated. Once you've completed the training dates for the individual and adjusted the status, you would then click save changes.

And I'll now turn it over to Stefani, and she'll talk with you more about adding new residents.

SM: Thank you, Candace. At the time that you are adding a new resident, it is important to know a few things. If they are a new resident, then right here towards the bottom of the screen, you will see create new residents there.

There you would be able to add their information. Anything that has an asterisk is very important. It will not let you advance if that information is not input.

Once you click add a new resident, then it will generate an ABOG ID, and they will automatically receive a notification through email with the ID and the account credentials.

Now, adding a new fellow is slightly different. For adding a new fellow, you will not need to click add a new user. It'll always be at an existing user because at this point, they would have already been in our system.

This is how the screen would look like. You would input their user ID. If you don't have that ABOG ID number, then you can list first, last name, and date of birth. It'll automatically generate that physician. If for whatever reason you feel like this is not the person that you are looking for, then you can always email exams@abog.org, and we would be more than happy to assist you.

When you add a fellow, you will be able to edit their current program year. This is only at the time that you are adding the fellow. If for whatever reason later down the road their program year is incorrect, this will be also another inquiry to exams@abog.org.

Now, advancing residents and fellows. For residents, it starts July 1st, and for fellows, it starts August 1st. This is typically the day after graduation. Most residents are set to graduate June 30th and for fellows July 31st.

This is what the screen to promote the fellow would look like. You will go from the last year to the newest year. If for whatever reason you cannot advance that fellow, there is an option to unselect their name. And it'll ask you for a reason here. You can put something as simple as fellow in current year or needs to make up time, anything of that sort.

So the FLS and EMIGS is a certification that is required to sit for the exam. At the time that you sit for your Qualifying Exam, you can still be set to take it. It is only a requirement to sit for the Certifying Exam. Program Managers will be able to see if their certification is uploaded on the Program Manager portal. If you need to upload it for any reason, then you would email exams@abog.org or the physician would be able to do this on their personal portal.

If you ever need to remove a resident if they have transferred, withdrawn, anything of that sort, then you will also email Exams. We will remove it for you.

CD: So let's pivot a little bit to the Program Director portal, and we do get questions about where we can find the program performance reports, so we want to help you navigate and locate that really helpful report so you can see how your program is doing compared to other ACGME-accredited programs.

This is an example of what a Program Director might see in their portal. If we go to the upper right hand corner, there are three lines. That's the hamburger menu. And if you click on that, there will be a drop down menu, and you can go to My Files. Just know that these performance reports usually are loaded onto the Program Director's portal. I mean, it's my understanding they also appear in the Program Manager portal, and those are usually available four weeks after the candidates have received their results. As a gentle reminder, it can take up to six weeks for candidates to receive their scores from the time of the exam.

When you click on My Files, you will see a page that looks like this, and program performance reports are available for both the QE and the CE, and it's usually for each exam cycle. So you would just navigate to the report of interest, and then you can click View, and you will be given a PDF document. A really great report. You can find, for example on the QE side, you can get your current year pass rate, you can get three-year program pass rates, and for the QE, for those individuals who are sitting for the exam, you will be notified through the report as well as to whether they passed or were unsuccessful.

For our Program Directors, one very crucial responsibility is verifying training. And so this is again another example of what you might see. So under Administrative Tasks, you will see Sign Training Affidavits, again pending. And so once you click on that task, it will pull up a window that looks like this where you will need to verify training for each trainee, whether it's a resident or fellow, and then the training affidavits are populated in the Program Director's portal 31 days prior to the completion date for each trainee, so each resident or fellow. And these must be completed electronically. You cannot print them off and submit them to us.

So if you click on that affidavit button next to an individual's name, you will see, so this is an example of an FPMRS fellow, so you will see a document like this. And then for our Program Directors, one of the most important things is to check and make sure that the training dates on this electronic document are indeed correct. So for example, if you have a fellow who has completed a year at your program but then transferred out or has withdrawn, you want to make sure that you can certify at the bottom and click that checkbox that the information in here is accurate. Once you do that, the sign affidavit button becomes active, and then you click on that.

And then there's also an option to unverify the training affidavit. So instead of seeing an affidavit button, you will see a red button, and if you click on that button, what you'll be prompted with is asking whether you actually want to remove the training verification. And if you click yes, then that training verification goes away. Just as a gentle reminder, these need to be completed in a timely manner so that there are no delays in a potential physician receiving an application. And I'll turn it over to Stefani to summarize some of the great information that we shared today.

SM: This is a small little timeline that would be helpful to Residency Program Directors and Coordinators, as well as Fellowship. It will give you the breakdown in the dates of what is expected in that month.

For April, for Fellowship Directors, you will get the Approve and Send Annual Report. Managers will have the task that states Activate Fellows for the annual report. In May, May 30th to be exact, residency directors will get the prompt to start signing training affidavits. May 30th as well, the fellowship director would also get that task, and the manager and coordinator will have the annual report maintenance task.

Moving on to July. This is when residents and fellows are expected to graduate around this time, so you will start to get the task to advance your candidates. For fellows, on July 17th, the annual report is due, and for managers or coordinators, it's that maintenance report.

Moving on to August, for fellowship managers, they need to advance fellows at this point, and in December for both residency programs and fellowship programs, the advanced residence task is due. Throughout the whole year, you will have the add and maintain residents task available to you. Just keep in mind it's better to do it before the end cycle so there won't be any issues with the application fee moving forward.

Can the Program Manager upload the FLS results for the residents?

CD: We do appreciate Program Managers trying to support their trainees. The best and preferred method is to have physicians upload that document to us. If you still want to send us PDFs of the FLS certificate for your trainees, that's acceptable as well, but we do want to empower residents to go on to their portal and be able to do this themselves. That also releases some administrative burden from RPMs so that they can focus on other tasks. If for whatever reason that task is unavailable for a resident or trainee, then yes, please go ahead and send that to us.

The program years for the residents are not accurate. Who do I reach out to in order to get this updated?

SM: That would be to exams@abog.org. We would need the resident's name, preferably their ABOG ID as well, the program's ID, or we're okay with the name, and we will edit that for you.

Why do you need to keep advancing the fellows? Ours is a three-year program, and we only advance them one time a year.

SM: The advanced button does come once a year, so you would add the fellow as year one. Once that first year is over, you'll advance them to the second year.

The timeline showed we should start advancing fellows in December, but if they start in August, is that still the case?

SM: The advanced fellows is due by December.

AR: So it starts in August when they start with you, and then the task ends in December. We would like it finished before December.

Can managers add new incoming residents anytime after match?

SM: Yes. So the add and maintain fellows or residents task does remain on the manager's portal throughout the whole year.

Are incoming first-year fellows advanced in July, second and third year fellows advanced August through December?

AR: It'll depend on the day that your fellows start. So, if your program starts July 1, you can start adding your fellows, advancing your fellows, you know as soon as the task opens. If your fellows don't start until August, you'll want to do it then.

CD: Let me just chime in here. What will happen is after December 31st is a lot of these tasks expire, and then that becomes a little bit more challenging when you're trying to advance these cohorts. A lot of the times this can cause follow-through errors, right? If for some reason that's skipped for either residents or fellows, then again, those things are just the inaccuracies are going to carry through. And we want to avoid those, and we will want to avoid having to go in and fix every individual trainee. And so we want to empower you to do this right the first time. So don't wait like Andrea said. Start the process early, and if you have any questions, please feel free to reach out to either myself or Stefani.

To confirm, QE results are not released until the end of October, and CE results, six weeks after the week of the exam?

DD: So that's right for both of them. It's about six weeks because of all of the psychometric rigor that goes into making sure that we have created a fair exam for each of our candidates as we are making pass/fail decisions on that information. So program reports would be released four weeks after those dates. That is correct. So you're looking at about a 10-week period between the end of exams and the report being released to our Program Managers.

Will coordinators receive emails when the documents or information are due for the residents to ABOG?

CD: So usually there are two large reminder emails that go out. One is about advancing trainees, and then the other would be about training affidavits or verification of the affidavits. Those emails are pretty detailed with deadlines, and then if you do make a change to the status of a resident or trainee, usually, for example, if you change a resident to withdrawn or transferred, there is a follow-up. So ABOG gets notified of that change and there is a reminder email to correct and update the dates of training to actually reflect the timeframe that they

have actually been in training with you. So yes, there are reminders sent. We're hoping that the timeline that we're giving and the training today would add some clarity to what needs to be completed by when. And again, so July 1st is the date for residents, when you will see that advance button become active.

Is it best to add the interns after July 1st?

SM: Yes, it is best to add them after July 1st just because they will be starting in a new cycle.

Our fellows graduate June 30th. How will this impact your timeline?

AR: The start date and end date of your fellows, June 30th versus July 30th, it depends on what your institution wants to do. It's fine, it doesn't affect our stuff.

Will I receive the correct timeline for our tasks?

DD: Members of our team did put together the timeline that you saw in the presentation. This will be available for you at the end of the week, and it will go on our ABOG YouTube channel sometime next week. If you don't know how to get to our ABOG YouTube channel, you can go to any page on the ABOG website and click on the YouTube icon at the bottom, and that will take you directly to our YouTube site so that you can find the resources that you're looking for there.

For the affidavit, do you recommend waiting until after the fellow does their end of year milestone one-to-one review before they graduate?

SM: To sign the training affidavit, they do start on May 30th. It is recommended to just go ahead and wait a little while.

Are reminder emails also sent to PDs or just to managers or coordinators?

CD: It's my understanding they go out to the program admins. They are sent to both.

AR: When I send stuff for the fellowships, I usually start with the coordinator, and then my second round of emails will be coordinator and program director.

My residents graduate June 16th. How does that impact the ABOG timeline?

AR: As long as the training dates are accurate when you look at everything and they're accurate when you look at your add/maintain fellows, then all of our stuff will be based off of that. So if their training date shows that they end June 16th, they will get their training affidavit to be signed 31 days before that.

Are incoming first-year fellows advanced in July and second and third year fellows advanced August through December?

AR: Usually when you enter in your new fellows, you're going to put them in as a year zero because most times you're going to enter your fellows pretty much right after the match. So because they're still attached to a residency program, you're going to put them as a year zero. And then when you advance all of your fellows, you will advance them as well. So they will advance from a zero to a one and all of the rest of yours will go one to two, two to three, like that.

A resident off cycle graduating mid-September can still take the QE in July, correct? Or do they need to wait until the next year?

DD: So they need to have completed their training by September 30th. So as the promotion is happening, as training is being verified in the system, they would have to have been done by September 30th in order for them to get their results. If, for whatever reason, life happens, there's another complication in their training is further delayed into October, then that candidate would have to wait the next year. But if they have completed by September 30th, then they could have sat for the QE in July and receive their score with the rest of their cohort.

I'm a new coordinator and the previous coordinator has been trying to give me access to ABOG and listed as the new coordinator for our program. She has emailed ABOG but has had no reply for several weeks. What should we do?

AR: So if they're a fellowship coordinator, then you will email fellowship@abog.org, and if it is a residency, right now you will email exams@abog.org, and we can get that changed for you.

SM: And it is important to keep in mind that you would have to be listed as the new coordinator with ACGME before we can give you access through ABOG.

Can we have two coordinators for one program?

SM: No, only one coordinator can be listed. If they choose to, they can share the password, but we can only have one on file.

DD: Okay, it looks like that is the end of our questions. We would like to ask if you guys can drop into the Q&A, are there other topics you would like for us to speak to you on. What is the just-in-time information you feel like you need to have in order to successfully complete the duties and responsibilities you have in terms of your relationship with ABOG? If you don't put those in the Q&A, please feel free to email exams@abog.org, and we are constantly-

Okay, we've got one about understanding the board exam results. Okay, great. We can do something about that. Annual reports, what's available and when. We can take a deeper dive into that information, thank you so much.

Do you find the webinars useful, and what frequency would you like to see ABOG reaching out to our stakeholders? Is it preferred to do it in this kind of interactive format? Would you prefer a newsletter? I know a lot of our inboxes get really, really full with things we intend to read and then things happen.

There's a question about whether this recording will be available. The good news is yes. We will have this information available for you next week. It'll be on the ABOG YouTube channel, and if you don't know how to get there, you go to the ABOG website, click on the YouTube icon at the bottom of any page, and it will take you straight to our YouTube channel. And this should be at the very top of the things listed there.

Okay, we have a request just that timely topics are needed. That is exactly what drove this webinar today, so we will be looking at that timeline that was shared with you in the webinar and considering what we might need to respond to next. Happy to help.

CD: And Deana, if I may just chime in, let me just echo that nothing is written in stone. We're not aiming here for perfection, it's progress. So if at any time it's easier to get on the phone with myself or Stefani, please feel free to call us. We don't want you sitting in frustration. Any of these tasks should not be a pain point for you, so please feel free to pick up the phone and call us. We don't bite, and we're happy to walk you through a process or give you a refresher on any of these processes, right? And if you can let us know of ways or opportunities for improvement, we welcome those as well.

DD: Looks like we have a suggestion that perhaps quarterly webinars would be helpful for our managers and directors. We can absolutely look at scheduling that out.

Okay, again, there are some requests about sending out today's presentation. Yes, so recording will go out. It'll probably be tweaked by the end of the week or the beginning of next week and sent out to those that registered for this, but you can always find our webinars on our YouTube channel. Again, go to abog.org, the YouTube icon at the bottom of any page will take you to our YouTube channel.

Thank you for your time. This is something we want to make part of our regular practice, and so as you run into things that you want to know more about, please feel free to email us with that information, and we will work to calendar out these timely topics for you and send out a proposed schedule here very soon. Again, thank you for your time and participation. ABOG's here to help you. Have a great day, everybody.