



Annual Timeline

for

Residency Programs

Outlined below is a timeline of the annual cycle of events in an ACGME-accredited residency program. [Reoccurring monthly tasks are indicated in blue.](#) It is suggested that you adjust this list for your specialty and program. Examples may include: in-service exams, board exam preparation, state medical license renewals, chief resident selection, resident retreat, and specialty-specific associations and conferences.

At the start of each academic year, it is recommended that you read the ACGME Common and Specialty-Specific Program Requirements to remind yourself of the requirements for your specialty.

JULY

Accreditation

- The **ACGME ADS Annual Update** typically takes place between the months of July and September. Programs will receive a notification email from the ACGME at the beginning of the reporting timeframe. You will be asked to update information about your program, update resident and faculty rosters (be sure to update PD license expiration dates), and enter resident and faculty scholarly activity from the previous academic year. After confirming all residents and core faculty have entered their scholarly activity in NI, you can extract the data by going to Portfolio>Scholarly Activity>Activity Reports>ADS Categories tab, set dates to last academic year, generate report for core faculty, then for residents; be sure to check the “include archived” box.
- **Participating site list and faculty roster** should be kept up-to-date at all times in the ACGME Accreditation Data System (ADS) and NI (Administration>Program>Participating Sites & Personnel). Additions and deletions of participating sites must be approved by the GMEC. Notify KCU GME (gme@kansascity.edu) of new faculty to have them granted faculty appointment and library access.
- The **GME Track National GME Census Program Survey** typically takes place between the months of May and July. Programs will receive a notification email from GME Track at the beginning of the reporting timeframe. This information is used to update FREIDA Online, a database of all ACGME-accredited GME programs in the US.
- The **GME Track National GME Census Resident Survey** typically takes place between the months of July and September. Programs will receive a notification email from GME Track at the beginning of the reporting timeframe.
- Use feedback from the Program Evaluation Committee (PEC) meeting to complete the **Annual Program Evaluation (APE) Review form** in NI no later than **July 10th**.
- **Faculty evaluation meetings** between the PD and each faculty member must occur at least annually; the timing of these is flexible. These evaluations must include a review of the faculty member’s clinical teaching abilities, engagement with the educational program, and participation in faculty development related to their skills as an educator, clinical performance, professionalism, and scholarly activities. Generate a composite evaluation report in NI for each faculty member (Evaluations>Reports>Faculty tab, click on faculty name) to be distributed during the meeting.

On-boarding/Orientation

- Hospital, departmental, and/or program-specific **orientation for new residents** typically takes place in late June or July.
- Some specialties are required to track resident cases/procedures in the **ACGME Resident Case Log System**. Programs in these specialties will need to instruct new residents on how to correctly and timely log this information into WebADS.
- **Update resident information** with your specialty’s professional organizations, including the specialty board.

Recruitment

- **Determine details of your recruitment season**, including selection committee members, eligibility criteria, application process, interview dates, rank meeting dates, and communication with applicants.
- **Book meeting rooms, hotels, shuttles, dinner reservations, etc.** as soon as recruitment dates are finalized.

- **Update your program's website.** It is suggested that you include program aims and eligibility criteria, which must be made available to applicants. See KCU GME's Suggested Content for Residency Program Websites for additional content suggestions.
- **Update other media** used by applicants, such as FREIDA Online or program listings on your specialty organizations' websites.

New Innovations

- **Review list of people in NI** (Personnel>Personnel Records, use drop down menu or arrow to scroll through everyone in your department), archive those who are no longer active and add anyone who is missing. Notify KCU GME (gme@kansascity.edu) of new faculty to have them granted faculty appointment and library access.
- **Set up evaluation sessions for the new academic year.** If current sessions are set to auto copy, they will do so on the session end date (typically 6/30). If you have updated evaluation forms for the new academic year, be sure the session is set to use the correct form. Archive old forms that are no longer in use.
 - Evaluation of Resident (on rotation) by Faculty - monthly, quarterly if longitudinal experience; forms need to be mapped to Milestones so data flows into Portfolio module
 - Evaluation of Resident (in Continuity Clinic) by Faculty - quarterly; forms need to be mapped to Milestones so data flows into Portfolio module
 - Evaluation of Faculty by Resident - monthly, quarterly if longitudinal experience
 - Evaluation of Rotation by Resident - monthly, quarterly if longitudinal experience
 - Evaluation of Resident by Nurse & Ancillary Staff - collect throughout the year and batch semi-annually prior to CCC meeting
 - Evaluation of Resident by Non-Clinical Staff - collect throughout the year and batch semi-annually prior to CCC meeting
 - Evaluation of Resident by Patient - collect throughout the year and batch semi-annually prior to CCC meeting
 - Evaluation of Resident by Peer - semi-annually prior to CCC meeting
 - Evaluation of Resident by Self - semi-annually prior to CCC meeting
 - Final Evaluation of Resident by Program Director - upon graduation; must consider recommendations from the CCC, verify that the resident has demonstrated the knowledge, skills, and behaviors necessary to enter autonomous practice, become part of the resident's permanent record, and be shared with the resident upon completion of the program
 - Evaluation of Faculty by Program Director – annually
 - Evaluation of Participating Site by Resident - annually
- **Match evaluations for July.** If sessions set to auto match, review matches for accuracy.
- **Monitor evaluation completion** for prior months. Most importantly, residents **must** be evaluated after each rotation. Notify PD of those who are 60+ days delinquent. The Annual Resident Evaluation Checklist (appendix A) at the end of this timeline can be used to track completion.
- **Check duty hour completion and compliance** (Duty Hours>Reports>Compliance). Residents should not go more than 2 weeks without logging hours. Violations should be reviewed to determine if caused by logging error (which should be corrected) or actual violation (should be reviewed by PD).
- Remind residents and core faculty to **log their scholarly activity in NI** regularly (Portfolio>Scholarly Activities>New).

- **Track and document resident conference attendance.** Programs are encouraged to use NI (Conferences>Manage Conferences).
- **Remind residents to log their procedures regularly.**

AUGUST

Accreditation

- The bi-monthly KCU **Graduate Medical Education Committee (GMEC) meeting** occurs the 1st Friday of August at 12:00 p.m. CT.
- The **ACGME ADS Annual Update** typically takes place between the months of July and September. Programs will receive a notification email from the ACGME at the beginning of the reporting timeframe. You will be asked to update information about your program, update resident and faculty rosters (be sure to update PD license expiration dates), and enter resident and faculty scholarly activity from the previous academic year. After confirming all residents and core faculty have entered their scholarly activity in NI, you can extract the data by going to Portfolio>Scholarly Activity>Activity Reports>ADS Categories tab, set dates to last academic year, generate report for core faculty, then for residents; be sure to check the “include archived” box.
- The **GME Track National GME Census Resident Survey** typically takes place between the months of July and September. Programs will receive a notification email from GME Track at the beginning of the reporting timeframe.

Recruitment

- The **Electronic Residency Application Service (ERAS®) Program Director Workstation (PDWS) typically opens** mid-August. Programs utilizing ERAS for the first time or programs whose director or coordinator are new to ERAS will need KCU GME to activate them prior to using the system. Webinars on how to use ERAS are available on their website.
- **Finalize your selection committee members** for the upcoming season and put interview and rank meeting dates on their calendars.
- **Update correspondence used in the recruitment/interview process**, including information about hotels, directions, transportation, itinerary, etc.

New Innovations

- **Match evaluations for August.** If sessions set to auto match, review matches for accuracy.
- **Monitor evaluation completion** for prior months. Most importantly, residents **must** be evaluated after each rotation. Notify PD of those who are 60+ days delinquent. The Annual Resident Evaluation Checklist (appendix A) at the end of this timeline can be used to track completion.
- **Check duty hour completion and compliance** (Duty Hours>Reports>Compliance). Residents should not go more than 2 weeks without logging hours. Violations should be reviewed to determine if caused by logging error (which should be corrected) or actual violation (should be reviewed by PD).
- Remind residents and core faculty to **log their scholarly activity in NI** regularly (Portfolio>Scholarly Activities>New).
- **Track and document resident conference attendance.** Programs are encouraged to use NI (Conferences>Manage Conferences).
- **Remind residents to log their procedures regularly.**

SEPTEMBER

Accreditation

- The **ACGME ADS Annual Update** typically takes place between the months of July and September. Programs will receive a notification email from the ACGME at the beginning of the reporting timeframe. You will be asked to update information about your program, update resident and faculty rosters (be sure to update PD license expiration dates), and enter resident and faculty scholarly activity from the previous academic year. After confirming all residents and core faculty have entered their scholarly activity in NI, you can extract the data by going to Portfolio>Scholarly Activity>Activity Reports>ADS Categories tab, set dates to last academic year, generate report for core faculty, then for residents; be sure to check the “include archived” box.
- The **GME Track National GME Census Resident Survey** typically takes place between the months of July and September. Programs will receive a notification email from GME Track at the beginning of the reporting timeframe.

Recruitment

- **Applicants can typically start applying** to ACGME-accredited programs in ERAS in early September.
- ACGME **programs typically start receiving applications** through ERAS in mid-September. Programs can set up filters in ERAS to display applicants who meet certain criteria.
- Begin to send **invitations to interview**.
- **Assemble packets and materials** to be distributed to candidates during interviews.
- **NRMP Main Residency Match registration typically opens** September 15th. Program directors will need to sign the match participation agreement, confirm their quota, and indicate SOAP participation prior to deadline, typically January 31st.

New Innovations

- **Match evaluations for September.** If sessions set to auto match, review matches for accuracy.
- **Monitor evaluation completion** for prior months. Most importantly, residents **must** be evaluated after each rotation. Notify PD of those who are 60+ days delinquent. The Annual Resident Evaluation Checklist (appendix A) at the end of this timeline can be used to track completion.
- **Check duty hour completion and compliance** (Duty Hours>Reports>Compliance). Residents should not go more than 2 weeks without logging hours. Violations should be reviewed to determine if caused by logging error (which should be corrected) or actual violation (should be reviewed by PD).
- Remind residents and core faculty to **log their scholarly activity in NI** regularly (Portfolio>Scholarly Activities>New).
- **Track and document resident conference attendance.** Programs are encouraged to use NI (Conferences>Manage Conferences).
- **Remind residents to log their procedures regularly.**

OCTOBER

Accreditation

- The bi-monthly KCU **Graduate Medical Education Committee (GMEC) meeting** occurs the 1st Friday of October at 12:00 p.m. CT.
- Schedule time for your **Clinical Competency Committee (CCC)** to meet in early December. At minimum, the committee must include 3 faculty members, at least one of whom is core faculty. Reserve a conference room and block time on committee members' calendars.
- Begin scheduling **Semi-Annual Review meetings** to take place between the PD and each resident in the month of December. Meetings must take place **after** the CCC meets to determine Milestone progression as this information will be shared with the resident during their meeting.

Recruitment

- The **Medical Student Performance Evaluations (MSPE)** (aka "Dean's Letters") are typically released on October 1st.
- Continue to **send invitations to interview**.
- Provide **interview process orientation/instruction** to the faculty and staff participating.
- **Residency candidate interviews** take place.
- Programs may choose to **update their ERAS participation status** to "no longer accepting applications" once the application deadline has passed (log into ERAS account maintenance, select ERAS participation tab, update participation status drop down menu). You will continue to receive application materials for existing applications.
- **Addiction Medicine Fellowship Match registration typically opens** at the end of October. Program directors will need to sign the match participation agreement, confirm their quota, and indicate SOAP participation prior to deadline.

New Innovations

- Begin collecting **evaluations of residents** by faculty, nurses, staff, patients, peers, and self in New Innovations in preparation for CCC meeting.
- **Match evaluations for October.** If sessions set to auto match, review matches for accuracy.
- **Monitor evaluation completion** for prior months. Most importantly, residents **must** be evaluated after each rotation. Notify PD of those who are 60+ days delinquent. The Annual Resident Evaluation Checklist (appendix A) at the end of this timeline can be used to track completion.
- **Check duty hour completion and compliance** (Duty Hours>Reports>Compliance). Residents should not go more than 2 weeks without logging hours. Violations should be reviewed to determine if caused by logging error (which should be corrected) or actual violation (should be reviewed by PD).
- Remind residents and core faculty to **log their scholarly activity in NI** regularly (Portfolio>Scholarly Activities>New).
- **Track and document resident conference attendance.** Programs are encouraged to use NI (Conferences>Manage Conferences).
- **Remind residents to log their procedures regularly.**

NOVEMBER

Accreditation

- If you haven't done so already, schedule time for your **Clinical Competency Committee (CCC)** to meet in early December. At minimum, the committee must include 3 faculty members, at least one of whom is core faculty. Reserve a conference room and block time on committee members' calendars.
- Finish scheduling **Semi-Annual Review meetings** to take place between the PD and each resident in the month of December. Meetings must take place **after** the CCC meets to determine Milestone progression as this information will be shared with the resident during their meeting.
- Register for **ACGME Annual Educational Conference**, including travel and hotel if applicable.

Recruitment

- **Residency candidate interviews** take place.
- Some programs begin holding **rank meetings**.

New Innovations

- Ensure your **Semi-Annual/Summative Evaluation Portfolio Reviews** are set up in New Innovations.
- Ensure **evaluations of residents** by faculty, nurses, staff, patients, peers, and self are completed in New Innovations prior to CCC meeting.
- **Match evaluations for November**. If sessions set to auto match, review matches for accuracy.
- **Monitor evaluation completion** for prior months. Most importantly, residents **must** be evaluated after each rotation. Notify PD of those who are 60+ days delinquent. The Annual Resident Evaluation Checklist (appendix A) at the end of this timeline can be used to track completion.
- **Check duty hour completion and compliance** (Duty Hours>Reports>Compliance). Residents should not go more than 2 weeks without logging hours. Violations should be reviewed to determine if caused by logging error (which should be corrected) or actual violation (should be reviewed by PD).
- Remind residents and core faculty to **log their scholarly activity in NI** regularly (Portfolio>Scholarly Activities>New).
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- **Remind residents to log their procedures regularly**.

DECEMBER

Accreditation

- The bi-monthly KCU **Graduate Medical Education Committee (GMEC) meeting** occurs the 1st Friday of December at 12:00 p.m. CT.
- The **Clinical Competency Committee (CCC)** meets to review each resident's evaluations, document their progression on achieving Milestones in NI (Portfolio>Milestones), and advise the PD regarding resident progress, including promotion, remediation, and dismissal. At minimum, the committee must include 3 faculty members, at least one of whom is core faculty.
- **Semi-Annual Review meetings take place** between the PD and each resident. These meetings must take place **after** the CCC meets to determine Milestone progression. The PD must review the residents' evaluation of performance, including progress along the specialty-specific Milestones, assist residents in developing individualized learning plans to capitalize on their strengths and identify areas for growth, and develop plans for residents failing to progress. The PD completes and electronically signs the Portfolio Review Form in NI and attaches the completed supplemental questions document (if applicable), then the resident electronically signs the form confirming the information was reviewed with them.
- **Report residents' Milestone progression in WebADS** after semi-annual review meetings take place between the PD and each resident. The ACGME Milestone Evaluation reporting window is typically between November and early January. Programs will receive a notification email from the ACGME at the beginning of the reporting timeframe.

Recruitment

- **Residency candidate interviews** continue.
- Some programs begin holding **rank meetings**.
- **Review resident Agreement of Appointment** (contract) template for the upcoming year to determine if updates need to be made. Changes must be reviewed and approved by the GMEC. A copy of (or web link to) the agreement applicants will be expected to sign if matched to your program (or the one currently in use) must be provided to interviewees.

New Innovations

- **Match evaluations for December.** If sessions set to auto match, review matches for accuracy.
- **Monitor evaluation completion** for prior months. Most importantly, residents **must** be evaluated after each rotation. Notify PD of those who are 60+ days delinquent. The Annual Resident Evaluation Checklist (appendix A) at the end of this timeline can be used to track completion.
- **Check duty hour completion and compliance** (Duty Hours>Reports>Compliance). Residents should not go more than 2 weeks without logging hours. Violations should be reviewed to determine if caused by logging error (which should be corrected) or actual violation (should be reviewed by PD).
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JANUARY

Accreditation

- The **ACGME Resident & Faculty Surveys** typically take place between January and April. Programs will receive a notification email from the ACGME at the beginning of the reporting window. A response rate of at least 70% is required for residents and faculty. Be sure to share the survey prep video with residents and faculty and meet with them to discuss prior to the surveys being distributed.
- If you haven't done so already, **report residents' Milestone progression in WebADS**. The ACGME Milestone Evaluation reporting window is typically between November and early January.

Research

- **KCU Research Symposium** dates and abstract/poster submission guidelines are typically announced in January.

Recruitment

- If you haven't done so already, make sure PD has **signed the NRMP match participation agreement, confirmed their quota, and indicated SOAP participation** prior to the deadline, typically January 31st.
- For some programs, **residency candidate interviews continue**.
- **Collect final scores** and comments from interviewers and residents.
- The selection committee meets to **determine the rank order list**.
- The NRMP **rank order list entry typically opens** mid-January. Send a copy of your rank list to the DIO for eligibility review prior to certifying.

Orientation/On-boarding

- Check current residents' licenses, registrations, and certification expiration dates and plan renewal process for the year (ex: medical license, DEA, BNDD, BLS, PALS, ACLS, etc.).

New Innovations

- **Match evaluations for January**. If sessions set to auto match, review matches for accuracy.
- **Monitor evaluation completion** for prior months. Most importantly, residents **must** be evaluated after each rotation. Notify PD of those who are 60+ days delinquent. The Annual Resident Evaluation Checklist (appendix A) at the end of this timeline can be used to track completion.
- **Check duty hour completion and compliance** (Duty Hours>Reports>Compliance). Residents should not go more than 2 weeks without logging hours. Violations should be reviewed to determine if caused by logging error (which should be corrected) or actual violation (should be reviewed by PD).
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- **Remind residents to log their procedures regularly**.

FEBRUARY

Accreditation

- The bi-monthly KCU **Graduate Medical Education Committee (GMEC) meeting** occurs the 1st Friday of February at 12:00 p.m. CT.
- The **ACGME Resident & Faculty Surveys** typically take place between January and April. Monitor completion and ensure program achieves a response rate of at least 70% for residents and faculty.
- **ACGME Annual Educational Conference** typically takes place in February or March.

Recruitment

- If not already complete, the selection committee meets to **determine the rank order list**.
- **Enter rank order list in NRMP** by deadline, typically mid to late February or early March, and confirm it is certified by the PD. Coordinators are prohibited from certifying rank order lists.
- If your program is participating in the **Supplemental Offer and Acceptance Program (SOAP)**, familiarize yourself with the process to be prepared if you do not fill all of your spots in the Match.

Orientation/On-boarding

- **Notify current residents** in writing if their agreement will not be renewed, if they will not be promoted to the next level of training, or if they will be dismissed.

New Innovations

- **Match evaluations for February.** If sessions set to auto match, review matches for accuracy.
- **Monitor evaluation completion** for prior months. Most importantly, residents **must** be evaluated after each rotation. Notify PD of those who are 60+ days delinquent. The Annual Resident Evaluation Checklist (appendix A) at the end of this timeline can be used to track completion.
- **Check duty hour completion and compliance** (Duty Hours>Reports>Compliance). Residents should not go more than 2 weeks without logging hours. Violations should be reviewed to determine if caused by logging error (which should be corrected) or actual violation (should be reviewed by PD).
- Remind residents and core faculty to **log their scholarly activity in NI** regularly (Portfolio>Scholarly Activities>New).
- **Track and document resident conference attendance.** Programs are encouraged to use NI (Conferences>Manage Conferences).
- **Remind residents to log their procedures regularly.**

MARCH

Accreditation

- The **ACGME Resident & Faculty Surveys** typically take place between January and April. Monitor completion and ensure program achieves a response rate of at least 70% for residents and faculty.
- **ACGME Annual Educational Conference** typically takes place in February or March.

Research

- The **KCU Research Symposium** abstract and poster submission deadlines are typically in March.

Recruitment

- **Match Day** occurs mid-March; results are posted on the NRMP web site. Feel free to welcome your new residents with a personal phone call; they will always remember this personal touch.
- **SOAP** takes place for programs that opted to participate and did not fill in the Match.
- **Import newly matched residents' data from ERAS to NI.** In ERAS, change your matched residents' statuses to "Will Start." In NI, go to Personnel>Tools>Import ERAS Data.
- **Download and save Match reports** from NRMP R3 system prior to its closing on June 30th.

Orientation/On-boarding

- Send newly matched residents their **Agreement of Appointment (contract)** soon after the Match. You must use the template reviewed and approved by the GMEC.
- Start working on new **Agreements of Appointment (contracts)** for current residents for the new academic year. You must use the template reviewed and approved by the GMEC.
- **Prepare program-specific onboarding information and tasks** for incoming residents. Programs are encouraged to use the NI onboarding checklist (Personnel>Checklists>Onboarding).

New Innovations

- **Match evaluations for March.** If sessions set to auto match, review matches for accuracy.
- **Monitor evaluation completion** for prior months. Most importantly, residents **must** be evaluated after each rotation. Notify PD of those who are 60+ days delinquent. The Annual Resident Evaluation Checklist (appendix A) at the end of this timeline can be used to track completion.
- **Check duty hour completion and compliance** (Duty Hours>Reports>Compliance). Residents should not go more than 2 weeks without logging hours. Violations should be reviewed to determine if caused by logging error (which should be corrected) or actual violation (should be reviewed by PD).
- Remind residents and core faculty to **log their scholarly activity in NI** regularly (Portfolio>Scholarly Activities>New).
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- **Remind residents to log their procedures regularly.**

APRIL

Accreditation

- The bi-monthly KCU **Graduate Medical Education Committee (GMEC) meeting** occurs the 1st Friday of April at 12:00 p.m. CT.
- The **ACGME Resident & Faculty Surveys** typically take place between January and April. Monitor completion and ensure program achieves a response rate of at least 70% for residents and faculty.
- Schedule time for your **Clinical Competency Committee (CCC)** to meet in early June. At minimum, the committee must include 3 faculty members, at least one of whom is core faculty. Reserve a conference room and block time on committee members' calendars.
- Begin scheduling **Summative Review meetings** to take place between the PD and each resident in the month of June. Meetings must take place **after** the CCC meets to determine Milestone progression as this information will be shared with the resident during their meeting.
- The **Program Evaluation Committee (PEC)** must meet at least once every academic year between the months of May and June to complete an **Annual Program Evaluation (APE)**. Programs will receive a notification email from KCU GME when this process begins. Schedule time for your PEC to meet and start preparing materials to be reviewed.
- Begin **reviewing/updating** program aims, competency-based goals and objectives by PGY level for each rotation/educational experience, policies and procedures, resident handbook, and other documents for the upcoming academic year.

Research

- The **KCU Research Symposium** takes place the first week of April.

Orientation/On-boarding

- KCU GME will send an **onboarding checklist** to incoming residents through NI. Programs will be informed of what this checklist includes to avoid duplication.
- Send **program-specific onboarding information and tasks** to incoming residents. Programs are encouraged to use the NI onboarding checklist (Personnel>Checklists>Onboarding).
- **Order** lab coats, scrubs, badges, pagers, parking passes, iPads, books, etc. for incoming residents.
- **Begin planning orientation** for incoming residents.

Graduation

- Start plans for **graduation** (room reservations, invitations, dinner, programs, gifts, awards, etc.).
- KCU GME will contact programs to collect **graduation certificate** information. Programs will need to confirm list of graduates, dates of training, and how residents would like their name to read.

New Innovations

- KCU GME will send anonymous **evaluations of the program** to faculty and residents through NI in April. These evaluations are separate from the surveys sent by the ACGME. The results of these evaluations are to be reviewed by the PEC during the Annual Program Evaluation.
- Begin working on the resident **block schedule** for the following year.
- Begin working on the resident **conference/didactic schedule** for the following year.

- Begin collecting **evaluations of residents** by faculty, nurses, staff, patients, peers, and self in New Innovations in preparation for CCC meeting.
- **Match evaluations for April.** If sessions set to auto match, review matches for accuracy.
- **Monitor evaluation completion** for prior months. Most importantly, residents **must** be evaluated after each rotation. Notify PD of those who are 60+ days delinquent. The Annual Resident Evaluation Checklist (appendix A) at the end of this timeline can be used to track completion.
- **Check duty hour completion and compliance** (Duty Hours>Reports>Compliance). Residents should not go more than 2 weeks without logging hours. Violations should be reviewed to determine if caused by logging error (which should be corrected) or actual violation (should be reviewed by PD).
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MAY

Accreditation

- **ACGME Resident & Faculty Survey results** reports are typically released in May. Programs will receive a notification email from the ACGME when the reports are available. Resident reports will only be available for programs that reached a 70% response rate where at least 4 survey takers were scheduled to complete the survey. Faculty reports will only be available for programs that reached a 70% response rate where at least 3 or more scheduled faculty members completed the survey. Survey results must be shared and discussed with residents and faculty.
- The **GME Track National GME Census Program Survey** typically takes place between the months of May and July. Programs will receive a notification email from GME Track at the beginning of the reporting timeframe. This information is used to update FREIDA Online, a database of all ACGME-accredited GME programs in the US.
- If you haven't done so already, schedule time for your **Clinical Competency Committee (CCC)** to meet in early June. At minimum, the committee must include 3 faculty members, at least one of whom is core faculty. Reserve a conference room and block time on committee members' calendars.
- Finish scheduling **Summative Review meetings** to take place between the PD and each resident in the month of June. Meetings must take place **after** the CCC meets to determine Milestone progression as this information will be shared with the resident during their meeting.
- Ensure your **Program Evaluation Committee (PEC)** is scheduled to meet between the months of May and June. Continue preparing materials to be reviewed.
- Continue **reviewing/updating** program aims, competency-based goals and objectives by PGY level for each rotation/educational experience, policies and procedures, resident handbook, and other documents for the upcoming academic year.

Recruitment

- **ERAS closes** May 31st. Applicant data will no longer be available on the Applications tab after that date. The previous 3 years' applicant data can be downloaded & saved via the Archives tab in PDWS.
- If your program plans to recruit the following year, **register your program for ERAS** upon receipt of email notice from ERAS.

Orientation/On-boarding

- **Process incoming resident onboarding information** as it is completed.
- **Continue planning orientation** for incoming residents.

Graduation

- **Finalize graduation plans and events** (room reservations, invitations, dinner, programs, gifts, awards, etc.).
- **Graduation activities** typically take place in May or June.
- KCU GME will send graduating residents a **graduation checklist and survey** through NI prior to their graduation date. The checklist collects forwarding contact info and info about their position upon graduation. The survey collects information about their experience in the program.

New Innovations

- Ensure your **Semi-Annual/Summative Evaluation Portfolio Reviews** are set up in New *Kansas City University Graduate Medical Education Consortium, Revised 3/15/2023*

Innovations.

- Ensure **evaluations of residents** by faculty, nurses, staff, patients, peers, and self are completed in New Innovations prior to CCC meeting.
- Continue working on the resident **block schedule** for the following year and enter into NI when complete (Schedules>Block Scheduling>Schedule Rotations). Run Gap Locator to check for schedule gaps (Schedules>Block Scheduling>IRIS Tools>Gap Locator).
- Continue working on the resident **conference/didactic schedule** for the following year and enter into NI when complete (if applicable; Conferences>Manage Conferences).
- **Review and update all evaluation forms** being used by the program. Make necessary updates and changes to the forms in NI (Evaluations>Evaluation Forms). If the form is currently in use, copy the form, add the effective date to the end of the title, and make updates. You'll typically want updated forms to go into effect at the beginning of an academic year. Make sure faculty evaluations of residents are mapped to the Milestones so the data flows to the Portfolio module.
- **Match evaluations for May.** If sessions set to auto match, review matches for accuracy.
- **Monitor evaluation completion** for prior months. Most importantly, residents **must** be evaluated after each rotation. Notify PD of those who are 60+ days delinquent. The Annual Resident Evaluation Checklist (appendix A) at the end of this timeline can be used to track completion.
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JUNE

Accreditation

- The bi-monthly KCU **Graduate Medical Education Committee (GMEC) meeting** occurs the 1st Friday of June at 12:00 p.m. CT.
- The **GME Track National GME Census Program Survey** typically takes place between the months of May and July. Programs will receive a notification email from GME Track at the beginning of the reporting timeframe. This information is used to update FREIDA Online, a database of all ACGME-accredited GME programs in the US.
- The **Clinical Competency Committee (CCC)** meets to review each resident's evaluations, document their progression on achieving Milestones in NI (Portfolio>Milestones), and advise the PD regarding resident progress, including promotion, remediation, and dismissal. At minimum, the committee must include 3 faculty members, at least one of whom is core faculty.
- **Summative Review meetings take place** between the PD and each resident. These meetings must take place **after** the CCC meets to determine Milestone progression. The PD must review the residents' evaluation of performance, including progress along the specialty-specific Milestones, assist residents in developing individualized learning plans to capitalize on their strengths and identify areas for growth, and develop plans for residents failing to progress. The PD completes and electronically signs the Portfolio Review Form in NI and attaches the completed supplemental questions document (if applicable), then the resident electronically signs the form confirming the information was reviewed with them.
- **Report residents' Milestone progression in WebADS** after summative review meetings take place between the PD and each resident. The ACGME Milestone Evaluation reporting window is typically between late April and late June. Programs will receive a notification email from the ACGME at the beginning of the reporting timeframe.
- Ensure your **Program Evaluation Committee (PEC)** is scheduled to meet between the months of May and June. Continue preparing materials to be reviewed.
- Schedule **Faculty Evaluation meetings** between the PD and each faculty member to take place in July (the timing of these is flexible but must occur at least annually).
- Finish **reviewing/updating** program aims, competency-based goals and objectives by PGY level for each rotation/educational experience, policies and procedures, resident handbook, and other documents for the upcoming academic year.

Orientation/On-boarding

- Ensure **resident licenses** have been awarded by the applicable state(s).
- **Finalize and distribute orientation schedule** and information to all participants.
- **Assemble items and information** to be distributed to new residents at orientation.
- Hospital, departmental, and/or program-specific **orientation for new residents** typically takes place in late June or July.
- **Train new residents on how to use NI**, including how to view schedules, view/confirm policies, view/confirm curriculum, complete evaluations, log duty hours, log scholarly activity, log procedures (if applicable, some specialties log in WebADS), view conferences, and complete conference surveys.
- Send **updated composite pictures, pager lists, and schedules** to other departments, faculty, staff, participating sites, and any other interested parties.

Graduation

- **Graduation activities** typically take place in May or June.
- Send **signed copies of graduation certificates** to gme@kansascity.edu **prior** to distribution.
- Make sure graduates have entered their scholarly activities, logged duty hours, completed evaluations, logged procedures (some specialties log in WebADS), and completed their graduation checklist and survey in NI **prior to their departure**.
- **Collect keys, pagers, ID badges, access cards, etc.** from graduates prior to their departure.
- If your program uses an outside facility for graduation, **book date/location for following year**.

New Innovations

- Ensure program director completes a **final evaluation** for each resident upon completion of the program. This evaluation must consider recommendations from the CCC, verify the resident has demonstrated the knowledge, skills, and behaviors necessary to enter autonomous practice, be shared with the resident, and become part of the resident's permanent record.
- Finalize the resident **block schedule** for the following year and enter into NI when complete (Schedules>Block Scheduling>Schedule Rotations). Run Gap Locator to check for schedule gaps (Schedules>Block Scheduling>IRIS Tools>Gap Locator).
- Review and **update Curriculum settings in NI** (Schedules>Block Scheduling>Curriculum). Confirm each rotation has an updated set of competency-based goals and objectives by PGY level and that they're being distributed to residents prior to each rotation (quarterly for longitudinal experiences). Faculty should receive a copy of rotation goals and objectives at least annually.
- **Distribute updated program aims, resident handbook, policies and procedures, etc.** to residents and faculty. Programs are encouraged to upload these to NI (Administration>Program>Policies) and add to the resource buckets on the NI homepage.
- Finalize the resident **conference/didactic schedule** for the following year and enter into NI when complete (Conferences>Manage Conferences).
- **Match evaluations for June**. If sessions set to auto match, review matches for accuracy.
- **Monitor evaluation completion** for prior months. Most importantly, residents **must** be evaluated after each rotation. Notify PD of those who are 60+ days delinquent. The Annual Resident Evaluation Checklist (appendix A) at the end of this timeline can be used to track completion.
- **Check duty hour completion and compliance** (Duty Hours>Reports>Compliance). Residents should not go more than 2 weeks without logging hours. Violations should be reviewed to determine if caused by logging error (which should be corrected) or actual violation (should be reviewed by PD).
- Remind residents and core faculty to **log their scholarly activity in NI** regularly (Portfolio>Scholarly Activities>New).
- **Track and document resident conference attendance**. Programs are encouraged to use NI (Conferences>Manage Conferences).
- **Remind residents to log their procedures regularly**.

Annual Resident Evaluation Checklist

Name of Resident: _____ Academic Year: _____

	July	August	September	October	November	December	January	February	March	April	May	June
Eval of Resident (on rotation) by Faculty (monthly**)												
Eval of Resident (in continuity clinic) by Faculty (quarterly)												
Eval of Faculty by Resident (monthly**)												
Eval of Rotation by Resident (monthly**)												
Eval of Resident by Nursing and Ancillary Staff (semi-annually*)												
Eval of Resident by Non-Clinical Staff (semi-annually*)												
Eval of Resident by Patient (semi-annually*)												
Eval of Resident by Self (semi-annually)												
Eval of Resident by Peer (semi-annually)												
Semi-Annual Portfolio Review of Resident by PD (mid-year)												
Summative Portfolio Review of Resident by PD (end of academic year)												
Final Eval of Resident by PD (upon graduation)												

*Collected throughout the year and batched semi-annually prior to Semi-Annual and Summative Review meetings

** Can be completed quarterly if longitudinal experience