TITLE: Onboarding Process for Incoming Trainees Policy

APPROVED: 5/5/2020

REVISED: 8/14/2020

EFFECTIVE DATE: 5/5/2020; 8/14/2020

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:

On Match Day, programs will fill their positions as part of the recruitment process for Incoming Trainees. The Onboarding Process for Matched Applicants will occur from April thru June.

For ‘Out of Match’ trainee recruitment (after Match Day), the Program Director will make an offer by no later than April 30th for a start date of August 1st.

For trainee recruitment after April 30th, the Program Director will make an offer by no later than July 31st for a start date of October 1st.

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 PROCESS

1. For On-Cycle Fellows, coordinator will submit the following documents by December 15th:
   a. Incoming Trainee Data Form
   b. If previous training,
      i. Letter of Resignation from Program Director
      ii. Verification of Previous Training
      iii. Letter of Credit received from Previous Training Program Director
      iv. Letter or Email specifying the total eligible years approved as transferrable to your program from the American Board of Medical Specialty

2. For On-Cycle Residents, coordinator will submit the following documents by April 1st:
   a. Incoming Trainee Data Form
   b. If previous training,
      i. Letter of Resignation from Program Director
      ii. Verification of Previous Training
      iii. Letter of Credit received from Previous Training Program Director
      iv. Letter or Email specifying the total eligible years approved as transferrable to your program from the American Board of Medical Specialty

3. For Off-Cycle trainees, coordinator will submit the following documents within two weeks:
   a. Incoming Trainee Data Form
b. If previous training,
   i. Letter of Resignation from Program Director
   ii. Verification of Previous Training
   iii. Letter of Credit received from Program Director
   iv. Letter or Email specifying the total eligible years approved as transferrable
to your program from the American Board of Medical Specialty

4. Once the Coordinator submits the above listed items, the following process will take place:
   a. GME will prepare the Incoming Master List, University Medical Center (UMC)
      Clearance List and the Texas Medical Board (TMB) Spreadsheet.
   b. GME will email the UMC Clearance Form to UMC Medical Staff (David Rayas,
      Yvonne Acosta, and Kathleen McAlarney) and EPCH Medical Staff.
   c. UMC will assign their Online Modules to each trainee.

WELCOME EMAIL PROCESS
1. GME will send a Welcome Email to trainee(s) as soon as the Incoming Trainee Data Process
   above is complete.
2. It is the trainee’s responsibility to complete all tasks and requirements provided.
3. It is equally important for the coordinator to monitor each trainee’s compliance.

ADOBESIGN PROCESS
1. GME will set-up trainee(s) in AdobeSign and will send the required HR and GME documents
   for completion and signatures.
2. The trainee will, subsequently, receive an email (from AdobeSign) for completion of the
   documents.
3. AdobeSign will send an email notification to GME, HR, Immigration (if applicable) and the
   Coordinator as soon as the trainee completes all documents.

TMB PERMIT PROCESS
1. GME will request the trainee’s TMB Personal ID# from the Texas Medical Board (TMB) to
   begin the institutional permit process.
2. Once TMB provides the Personal ID#, the GME office will send the ID number to trainee
   with information and FAQs on the permit application process.
3. 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.
4. The TMB will assign an analyst to review the application.
5. The TMB analyst will communicate with the trainee via email for information, clarification,
   and to request additional information or documents.
6. 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).
   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: verifcis@tmb.state.tx.us
7. 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).

**MyEVALUATIONS.COM PROCESS**

1. **ERAS APPLICANTS (Matched Trainees):** After GME sends the Welcome Email to trainee(s), the coordinator may import trainee’s profile from ERAS to MyEvaluations.com.
2. **NON-ERAS APPLICANTS:** After GME sends the Welcome Email to trainee(s), the coordinator may add trainee in MyEvaluations.com manually.
3. After the trainee is imported or added manually, the trainee will receive an email from MyEvaluations.com.
   a. It is very important for the trainee to [click on the link](#) provided in the email to complete the validation process.
   b. The Program Coordinator will notify the GME office after validation is complete.
4. GME will assign the Onboarding Requirement Groups after the trainee’s account has been validated.
5. 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.
6. It is the trainee’s responsibility to complete all onboarding requirements.
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 (July 1st)** – Electronic Payroll Action Form (ePAF):
   a. Coordinator is encouraged to attend HR Workshops I and II to start this process and will submit the [Non-Tech Employee ePAF](#) by the deadline provided by HR in Workshop I.
   b. Coordinator will submit the [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 before IT can begin the eRaider Username and email activation process.
2. Once the ePAF reaches the 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 take care of this process expeditiously.
4. Once the trainee creates an eRaider account his/her TTUHSCEP email address will be generated in the system.
5. The GME Office will send the trainee’s eRaider username and email address to Coordinator.

**OFFER LETTERS (ON-CYCLE)**

1. **January:**
   a. GME notifies Coordinators and sends Offer Letters to [Matched Fellows](#) by the end of January – provided the Incoming Trainee Data Process is complete.
2. **February:**
   a. GME notifies Coordinators and sends J-1 **Renewal Offer Letters** to currently active J-1 Visa Holders **by end of February**

3. **April:** GME notifies Coordinators and sends Offer Letters to **Matched Incoming Trainees by mid-April** – provided the Incoming Trainee Data Process is completed timely.

4. **For Off-Cycle Trainees:** GME notifies Coordinator and sends Offer Letters via AdobeSign as soon as the Incoming Trainee Data Process is complete.

**RESIDENT/FELLOW AGREEMENT OF APPOINTMENT (CONTRACT)**

1. **March:** GME sends the **Contract Renewals** to currently active trainees via AdobeSign – Coordinator will be cc’d. **Step 3 must be passed first** before sending the renewal.
2. **May:** GME sends 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:** GME notifies Coordinator and sends Resident/Fellow Agreement of Appointment Contract via AdobeSign as soon as possible.

**CLEARANCE TO START TRAINING**

1. GME will email the UMC Clearance Form with updates to UMC and EPCH Medical Staff.
2. The Program Coordinator is responsible for scheduling ACLS / BLS / PALS training, as applicable. Contact: 215-8995
3. The Program Coordinator is responsible for scheduling TTUHSCEP EMR (CENTRICITY) training. Contact: 215-4111, Option 3
4. The Program Coordinator is responsible for scheduling UMC EMR (CERNER) training. Contact: Roy Atchison at (O): 544-1200 ext. 41047 or (C) 996-3672
5. The Program Coordinator is responsible for 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.
6. The Program Coordinator is responsible for submitting the Professional Liability Information (PLI) in Lubbock’s online system. Contact: Sheila Robinson (Lubbock), Unit Assist, Dir. 806-743-6412
7. **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.
8. As soon as the trainee arrives in El Paso:
   a. **ON-CYCLE**
      i. Trainee will attend Administrative In-Processing Day.
   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 how to use the checklist to obtain clearance from each office.
      iii. Trainee will obtain signatures from all listed departments and **report to the GME office as the final stop**.

**COMPLIANCE PROCESS**

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