| TEXAS TECH UNIVERSITY HEALTH SCIENCES CENTER AT EL PASO |
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| **Paul L. Foster School of Medicine** |
| **GRADUATE MEDICAL EDUCATION** |
| **Policy** |

**TITLE**: Onboarding Process for Incoming Trainees Policy

**PURPOSE:** To provide residency and fellowship programs guidance on the process for Onboarding Incoming Trainees. This process takes *approximately 90 days*.

**REVIEW:** This policy will be reviewed every two years by the Graduate Medical Education Committee (GMEC).

**POLICY STATEMENT:**

## ON-CYCLE PROCESS

1. The recruitment period for applicants will take place according to the programs' specific NRMP deadlines.
2. On-cycle applicants will start their training on *July 1st*.
3. The on-cycle recruitment period for applicants will take place from September 1st until Match Day.
4. The Program Coordinator will submit the following:

   a. Completed *Incoming Trainee Data Form* by specific deadlines provided by GME.

   b. The purpose of the Incoming Trainee Data Form is to obtain the applicant's data, including personal email and other relevant data that is utilized to begin the onboarding process. This process includes sending a Welcome email, preparing AdobeSign documents, and processing other administrative documentation.

   c. If the applicant **has completed previous residency/fellowship training,** the Program Coordinator will submit the following documents *by the onboarding deadline.* (*Per ACGME-CPRs-3.5 (Resident Transfers): The Program Director must obtain **verification of previous educational experiences** and a **summative competency-based performance evaluation** prior to acceptance of a transferring resident, and Milestones evaluations upon matriculation.*)

      i. **Verification of GME Training**

      ii. **Summative Competency-based Performance Evaluation**

   d. If an applicant is **completing partial training at the previous institution**, please submit:

      i. A **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.

5. If the trainee *resigned*, please include a copy of the trainee's **Letter of Resignation.**

**OFF-CYCLE PROCESS**

1. The off-cycle recruitment process for residents and fellows will take place from the Monday *after* **Match Day** until *October 15th*.
2. Program Directors who wish to recruit off-cycle trainees must submit a written request to the GME office Designated Institutional Official (DIO).
3. Approval to proceed from the DIO must be granted before a written offer is sent to an applicant.
4. The Program Director must submit the Off-Cycle Request Form and required documents to the GME office DIO for review *by October 1st*. The review process may take up to two weeks.
5. The *deadline* for *final offer letter* is *October 15th*.
6. Once the review is complete, the DIO will determine if approval to proceed is granted and will notify the PD.
7. If approval to proceed is granted, the GME office will send the Offer Letter via AdobeSign.
8. The final off-cycle training start date will be by no later than **January 15th**.
9. If an applicant *cannot* start by **January 15th,** they *must go through the match* in accordance with the NRMP, as applicable.
10. For any other case scenarios if an applicant cannot start by **January 15th**, their start date will be deferred to **July 1st**.
11. If the DIO approves the off-cycle trainee(s), the GME office will, subsequently, begin the onboarding and clearance process in collaboration with the Program Coordinator. This process will take approximately 3 months.
12. If the applicant *has completed previous residency/fellowship training,* the Program Coordinator will submit the following documents *by the onboarding deadline.* (*Per ACGME-CPRs-3.5 (Resident Transfers): The Program Director must obtain* ***verification of previous educational experiences*** *and a* ***summative competency-based performance evaluation*** *prior to acceptance of a transferring resident, and Milestones evaluations upon matriculation.*)
    a. **Verification of GME Training**
    b. **Summative Competency-based Performance Evaluation**
13. If an applicant is *completing* **partial training *at the previous institution,*** please submit:
    a. A **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.
14. If the trainee *resigned*, please include a copy of the trainee's **Letter of Resignation.**

**IMMIGRATION PROCESS** *(If applicable)*

1. If a trainee requires a **Visa**, the Program Coordinator will email the ELP_Visa@ttuhsc.edu with a 'cc' to GME.
2. **Both Program 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.

## WELCOME EMAIL PROCESS

1. GME will send a **Welcome Email** to trainees, with cc to Program Coordinators, as soon as the Incoming Trainee Data Form and the appropriate documents are submitted to the GME office.
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 Program Coordinator to monitor each trainee's compliance.

## ADOBESIGN PROCESS

1. GME will send the required GME documents to each trainee for completion and signatures via AdobeSign.
2. AdobeSign will send an email notification to GME, the Immigration office *(if applicable)* and the Program 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 regarding the permit application process.
4. As soon as the trainee completes the TMB application and fees are paid, 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, Program 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 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 Program Coordinator.
c. Upload a copy of the license in their respective Residency Management Software – 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.

## RESIDENCY MANAGEMENT SYSTEM (RMS) [MyEvaluations / MedHub] PROCESS

1. **ERAS APPLICANTS:** After GME sends the Welcome Email to the trainee(s), the Program Coordinator will import the trainee's **profile** *from ERAS* to the respective RMS.
2. **NON-ERAS APPLICANTS:** After GME sends the Welcome Email, the Program Coordinator will ***manually*** add the trainee(s) in the respective RMS.
3. After the trainee(s) is/are added manually, the trainee will receive an email from the respective RMS.
   a. Trainees must *click on the link* provided in the ***MyEvaluations*** email to complete the ***validation process***.
   b. Trainees must follow the ***MedHub*** account process in the system generated email.
4. After trainees have been added to their respective RMS, GME will assign the Onboarding Requirements.
5. Once GME assigns the Onboarding requirements, trainees will receive an email from their respective RMS, which will include instructions on how to proceed with uploading the required documents.
6. It is each trainee's responsibility to complete all onboarding requirements by the deadline specified by the GME office.
7. It is equally important for Program Coordinators to monitor the trainee's compliance.
8. GME will review & verify all onboarding requirements for each trainee.

## EPAF PROCESS

1. **Electronic Payroll Action Form (ePAF):**
   a. Program Coordinator will contact HR for assistance and submit the following ePAFs:
      i. **Non-Tech Employee ePAF** by the deadline provided by **HR**
      ii. **New Hire Employee ePAF** by the deadline provided by **HR**
2. As soon as the Program Coordinator creates the **Non-Tech ePAF**, an **R#** will be generated.

## R# PROCESS

1. The Program Coordinator is responsible for emailing the **R#(s)** to HR and GME.
2. 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 Program Coordinator **must reach 100% approval level** before IT can begin 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 Program Coordinator.

## OFFER LETTERS

1. **FELLOWS:**
   a. GME notifies Program Coordinators and sends Offer Letters to ***Matched* Fellows *by the first week in February*** *(provided the Incoming Trainee Data Form is submitted timely)*.
2. **RESIDENTS:**
   a. GME notifies Program Coordinators and sends Offer Letters to ***Matched Residents by mid-April*** *(provided Incoming Trainee Data Form is submitted timely)*
3. **For Off-Cycle Trainees,** the Off-Cycle Request and Onboarding process will be followed.

## RESIDENT/FELLOW AGREEMENT OF APPOINTMENT (CONTRACT)

1. **May/June:** GME begins sending the Resident/Fellow Agreement of Appointment **Contracts** to *Incoming Trainees* via AdobeSign.
2. **July:** GME uploads all Resident/Fellow Agreement of Appointment Contracts to the respective RMS.
3. **For Off-Cycle Trainees:**
   a. GME notifies Program Coordinator and sends Resident/Fellow Agreement of Appointment *Contract* via AdobeSign as soon as possible.
   b. GME uploads the Resident/Fellow Agreement of Appointment Contract to the respective RMS.

## UMC AND EPCH CLEARANCE

GME will provide the UMC Clearance lists to UMC and EPCH Medical Staff.

## TTUHSCEP EMR (Centricity)

The Program Coordinator is responsible for scheduling EMR training by calling IT at (915) 215-4111, Option 3.

### UMC EMR (CERNER)

The Program Coordinator is responsible for scheduling CERNER training by contacting UMC EMR office.

### ACLS / BLS / PALS

The Program Coordinator is responsible for scheduling ACLS/BLS/PALS training by contacting TECHS at 915-215-6130.

### ID REQUISITION

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 **by June 1st.**

### PROFESSIONAL LIABILITY INFORMATION (PLI)

1. The Program Coordinator is responsible for submitting the Professional Liability Information (PLI) data in the Lubbock PLI online Enrollment Portal.
2. Program Coordinators may contact Sheila Robinson (Lubbock), Unit Assist, Dir. at (806) 743-6412 for guidance.
3. GME will verify completion of this process.

### TRAINEES NOT ABLE TO ATTEND ADMINISTRATIVE IN-PROCESSING DAY

1. The Program Coordinator is responsible for scheduling an appointment with HR for *eVerification* and *Immigration (if applicable).*
2. 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 where and how to obtain signatures for onboarding clearance from each office/department.
   c. Once trainee obtains signatures, he/she will **submit the signed checklist to their Program Coordinator.**
   d. The Program Coordinator will upload the completed Admin In-Processing Checklist in the respective RMS.

### COMPLIANCE PROCESS

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