### Record Retention, Completion of Training and Graduation

Wendy Greenwood, C-TAGME Program Coordinator, Cardiovascular Disease and Interventional Cardiology Fellowship Programs





# No disclosures

poor /poor,pôr/

For the greater.

adjective

1. When you have too much month at the end of your money.





# **Record Retention**





## What needs to be kept??





### **ACGME Requires:**

- Written evaluations (ours are in NI)
- Semiannual evaluations (ours are in NI)
- Summative evaluations (diplomas are housed with our GME)
- Rotation schedules

- Procedure logs
- Records of any disciplinary actions taken
- Moonlighting permission forms (MAR)





### CMS/Medicare requires:

- Rotation schedules
- Proof of prior training (medical school & residency)
- Contracts with training dates (maintained by GME)
- Leave of absence dates
- ECMFG certificates
- Visa information





### Certifying Boards require:

- Verification of prior training (GME)
- Procedure logs (in NI)
- Rotation schedules
- Leave time





### Other things to consider....

- Applications to fellowship program
- Candidate evaluation forms
- Rank order list(s)

- Notes regarding ranking
- Applicant acknowledgement forms





<u>Creighton</u> UNIVĔRSITY

#### 2018-2019 Resident/Fellow Applicant Acknowledgement

This signed acknowledgement is a confirmation that during my interview(s) with Creighton University Medical Center, I received a copy of the following items:

- 2017-2018 House Staff Contract with Exhibits A & B .
  - Exhibit A: Professional Liability Insurance
  - Exhibit B: Compact & Commitments
- 2017-2018 House Staff Salary
- **Benefits Plan Summary for 2017**
- 2017 Supplemental Benefit Overview
- Policies
  - o Institutional Policy for Resident Eligibility, Selection, Evaluation and Advancement
  - Resident Due Process and Grievance Policy
  - Clinical and Education Work Hours Policy
    - Moonlighting included in Clinical and Education Work Hours Policy
  - Visa Policy
- Acknowledgement .

Applicant's Signature

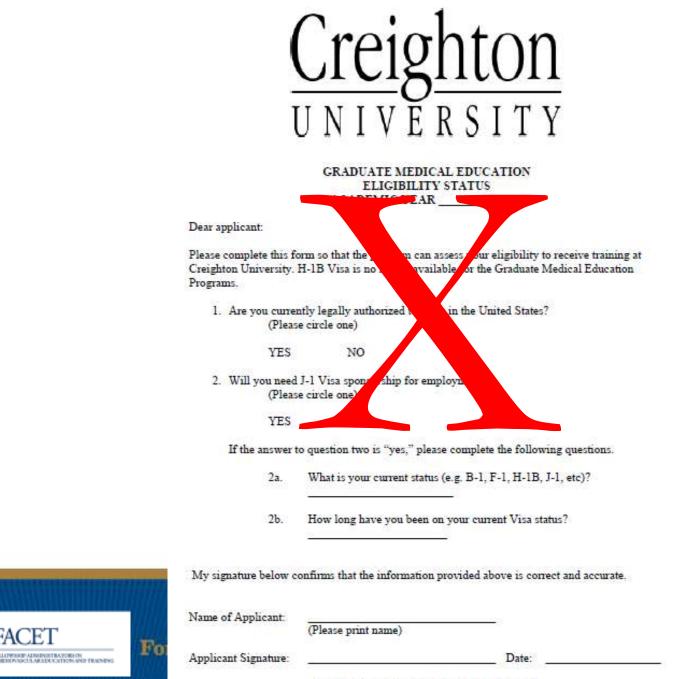
Applicant's Printed Name

PROFEPADMENTEATORIN Program Signature Date

FACET

Interview Date

Program Name



FACET



RETURN TO PROGRAM DIRECTOR

Upon completion of the training program, the individual was deemed to have demonstrated sufficient competence in the specialty/subspecialty to enter practice without direct supervision.

 $\Box \ Yes = \Box \ No = \Box \ N/A$ 

### Star

(IVNO, please provide an explanation in the "Additional Comments" section below or enclose a separate document.)

Did the program endorse this trainee as meeting the qualifications necessary for admission to

The information provided on this form is based on review of available training records and evaluations.

Signature:	Click here to enter text.
Printed Name:	Click here to enter text.
GME Title:	Click here to enter text.
Phone Number:	Click here to enter text.
Email:	Click here to enter text.
Date Form Completed:	Click here to enter text.

In an effect to improve and examplies the conductating process, the Ascendiation Crunall for Goudants Medical Education (ACGME), American Hospital Association (AHA), National Association Medical Staff Services (NAMES), and Degrainstion of Program Directors Associations (OPDA) have on Informated to cruce a crundled and "Verification of Goudants Medical Education Uniting (VGMET)" form designed to be completed mass of the completion of training (or at the Feet apportunity thermafter when the program is taken to complete a verification/endentialing form). This group has the been working with the Federation of State Medical Bounds (FSME) to address the anede for linear working the form and will continue that work. This VGMET is then the complete and inserted in the trainer's file. This time-stranged form, along with a near letter from the answer, This VGMET is then interfaced official, server, as the program's working to be form the program directory of an interface of a straining. The form will not include detailed lines of content possibul or working terms are set.



Section III: Attestation



### ALL CREDENTIALING REQUESTS MUST HAVE THE FOLLOWING FORM COMPLETED: <u>Residency</u> <u>Verification Request Form</u> (.docx)

Effective July 1, 2017: Due to the increase in requests for information/verification of residency/fellowship training, the department will begin charging for verifications. Please see clarifications below to determine if your verification will incur a fee.

### Fellows/residents who have graduated within the last five years:

- The standard verification form will be provided at no charge.
- Completion of a non-standard verification form will be a \$75 charge.

### Fellows/residents who graduated more than five years ago:

• Completion of the standard verification form will be a \$75 fee.

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• Completion of a non-standard verification form will be an additional \$75 fee.\*

\*The total fee for a resident/fellow verification that is more than five years out of the program, and is completed on a non-standard form, will total at \$150. The program will send an invoice for payment once a request has been made. The verification will be completed once the payment is received.

Checks should be made payable to Creighton University and mailed to the attention of the program coordinator in the respective program:



ARTEATORSIN TRAINEY

### In your downtime....

# Off-boarding!!





# My timeline...

March

 Provide GME with your graduating fellow's names and degrees (check, check and recheck!!!)

April

 Remind senior fellows to make sure their procedure logs are up to date – get required lists for off-setting procedures

May

- Provide graduating fellow's future plans to the GME office
- Final CCC meeting Milestone evaluations finalized and approval for matriculation of 3<sup>rd</sup> year fellows

May-June

- 6 month evaluations with PD
- Complete summative evaluations and standard verification forms for 3<sup>rd</sup> year fellows
- Assign 1<sup>st</sup>/2<sup>nd</sup> year fellow to each graduating fellow to gain access to their EHR for followup of patient care items
- Complete formal Milestone evaluations for NI and ACGME





## **Off-Boarding Continued**

### June

- Institution sponsored Farewell Graduation Luncheon all programs
- Update NI new addresses, phone numbers, emails, etc
- Collect pagers, keys, etc
- Finalize GME Exiting Check List
- Complete ABIM FasTrac Evaluations
- Farewell Banquet

Our GME office takes care of:

- Final certificate(s)
- Certificate of Insurance
- HR notification
- End date for badge access
- End date for New Innovations access







#### 2016-2017 CREIGHTON UNIVERSITY GRADUATE MEDICAL EDUCATION HOUSE STAFF CHECKOUT RECORD

Please complete this form and have it signed by appropriate personnel listed below and returned to the GME Office to receive your Certificate of Completion. GME is the last to sign off on your checkout record.

N	ame: Program:			
F	orwarding Mailing Address:			
С	ity: State: Zip Code:		_	
E	mail Address: Cell Pho	one Number:		
F	uture Plans:			
	Task to Be Completed	Contact	Signature of Contact	
1.	Check out at Department level for requirement verification	Program Coordinator		
2.	<ul> <li>Hospital ID badge to CUMC Security:</li> <li>CUMC - Until June 9<sup>th</sup>, please turn badge into Andrea Hunter or any security representative in the Security Office.</li> <li>Bergan - After June 9<sup>th</sup>, please call 402.717.4357 and meet security in the main lobby at Bergan to turn in badge</li> </ul>	Security		
3.	<ul> <li>CUMC Medical Records Status: Complete only after patient care is complete at Bergan and CUMC. Your access will be terminated immediately.</li> <li>House Staff to contact Debbie Todd at <u>Deborah.Todd@alegent.org</u> for email confirmation of completion</li> </ul>	Attach email to confirm completion of all CUMC Medical Records		
4.	<ul> <li>EPIC Completion Status: Please allow 24-hour notice</li> <li>House Staff to contact Craig Kulawik at (402) 343-4513 or Craig Kulawik@alegent.org or Lisa DeHart at (402) 717-0582 or Lisa Dehart@alegent.org for email confirmation of completion</li> </ul>	Attach email to confirm completion of all EPIC folder in your in basket		
5.	VA Offboarding Form: Please complete all required steps on the VA offboarding form	Attach a copy of the VA Offooarding form with all required signatures		

\* If you will continue to work at the VA - DO NOT complete the checkout process with the VA



CERTIFICATE OF COMPLETION RECEIVED

\_\_\_\_\_ Date: \_\_\_\_\_



GME Office Staff Initial:

House Staff Signature: \_\_\_\_

#### VA Nebraska Western-Iowa Health Care System

#### RESIDENT/FELLOW CLEARANCE SHEET

Name: \_\_\_\_\_ Program: Forwarding Mailing Address: City: \_\_\_\_\_ State: \_\_\_\_ Zip Code: \_\_\_\_\_ Email Address: \_\_\_\_\_\_ Cell Phone Number: \_\_\_\_\_ Task to Be Completed Signature of Contact Contact Complete VA Learner's Perception Survey: N/A (Resident sign) http://www.va.gov/oaa/surveys/ We NEED your feedback! Please do not skip this step!! VA/CPRS Medical Records: Basement B611 – Clinical 2. Anne Simpson Documentation (any unsigned notes or CPRS issues) Please reach out to Anne at 402-995-3865 or Anne.Simpson2@va.gov . Her office hours are 7AM-3:30PM with lunch from 12 noon to 12:30. VA Program Office: Check out with Program Program Office З. Coordinator (your point of contact at the VA). Return Designee: Janelle, PIV Card, Prox Card, and eMeal Card, program Annie, Yolanda, coordinator will initiate e-PAS termination. \*If you are Laura, Colby, or transferring to another VA keep your PIV card & let your Joni VA POC know which VA you are transferring to\* Medicine-UNMC Janelle Fredrick Room 9206 Medicine-Creighton Room 9206 Annie Dibelka Radiology Yolanda Relford Room 2537 Path-Lab Room 2314 Laura Ramsay Mental Health Room 11017 Colby Alley Room 4276 Surgery Joni Trouba



Resident Signature:\_\_\_\_\_



Date:

Exiting Resident/Fello <del>v</del> 2016–2017	Exiting CHI Health ID #	Outpatient Delegate Resident/Fellow/Attend ing with CHI Health ID #	Last Day of <u>OUTPATIENT</u> Clinical Care (i.e. EPIC use)	Inpatient Delegate Resident/Fellow/Attending (if different from Outpt) with CHI Health ID <b>#</b>	Last Day of INPATIENT Clinical Care (i.e. EPIC use)	Clinic Location	Last Day of Residency/Fellowsh ip
			C	ardiology			
		1	Chile	d Psychiatry			
		1	Colon an	d Rectal Surgery	-	1	1
		I		l			
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	_						
		1	Family Medicine U	bstetrics and Gynecology		1	
				tious Disease			
	1		Inrec	lious Disease	1	1	1
			Inter	nal Medicine			
			Interveni	tional Cardiology		1	
	1						
		1	Obstetric	s and Gynecology		1	I
							1
		•	Patholo	gy - Read Only			-
		•	P	Suchiatru		-	•





## Planning the Farewell Banquet!!





### Things to consider...

• Venue	• Invitations
• Awards	• Catering
• Flowers	• Rentals
• Programs	• Presentation(s)





File	C C ↑ Meeting	<b>↓                                    </b>	at Text Review	Add-ins Q	Farewell Banquet -		•	K. 994.	*.		Ko. X	X
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ت Send Update	To Subject Location Start time End time	Abuissa, Hussam;	ini, Amy; Bellamkonda,	d aboeata (ahmeda	aboeata 78@hotmail.com); <u>pel Core, Michael; pel Co</u>	<u>Ahmed Aboeta (a</u>	hmed.aboeata@va.q brooks, Dennis; Ester	ov); <u>Alla, Mahesh;</u> tbrooks, Dennis;		11 12 13 14	Th Fr Sa 1 2 3 8 9 10 15 16 17 22 23 24 29 30 1 6 7 8 Poor le room: Tot s that	
		alendar										~
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CARDIOVASCULAR FELLOW SCHOLARLY ACTIVITY RECOGNITION AWARD

Awarded to

### Venkata Mahesh Alla, MD

### by the Creighton University Cardiology Faculty 2012

To have striven, to have made the effort, to have been true to certain ideals - this alone is worth the struggle, - William Osler

> THE CARDIAC CENTER of CREIGHTON UNIVERSITY MEDICAL CENTER Outling Patient Care Through Education and Research





### Awards continued

Mid-March

- Create Survey Monkey for staff and faculty awards
- Remind Chief fellow to start discussions for Educator of the Year nominees.

April

- Tally scholarly activity and highest ITE awards
- Meet with awards company
- Send awards company plaque information (check, check and recheck!!)

May

 Review and approve final proofs one month before banquet





### Invitations

Mid to late April

• Finalize guest list

Early May

- Create invitation template
- Meet with print shop
- Approve final order
   Mid-May
- Send invitations
- Make sure RSVP list is current and up to date





The Creighton University Division of Cardiology Faculty are proud to recognize the following physicians as they complete their training with The Creighton University School of Medicine:

Alok Saurav, MBBS – Interventional Cardiology Fellowship Saurabh Aggarwal, MBBS – Cardiovascular Disease Fellowship Abhilash Akinapelli, MBBS – Cardiovascular Disease Fellowship Muhammad Soubhi Azzouz, MD – Cardiovascular Disease Fellowship Arun Kanmantha Reddy, MBBS – Cardiovascular Disease Fellowship/Chief Fellow Hemantha Koduri, MBBS – Cardiovascular Disease Fellowship Jitendra Pandya, MBBS – Cardiovascular Disease Fellowship

You and a guest are invited to join us as we celebrate their achievement Friday, June 16, 2017 CHI Health Clinic, A-B-C Conference Room 7710 Mercy Road, Clinic Entrance

> Cocktails – 6:00 pm Dinner – 7:00 pm Program – 8:00 pm

Please RSVP\*\* by Friday, June 9, 2017 to Wendy Greenwood 402-280-4235 or <u>wendygreenwood@creighton.edu</u>





### Catering

April

Reserve caterers

May

- Schedule meeting with chef
- Finalize menu
   Week before banquet

- Final headcount for food
- Caterers place final order for rentals





### Rentals

Early May

- Meet with rental company
- Select tableware, tableclothes/napkins
- Put in prelim order for tables





Dinner 6/17/16 at The Cardiac Center NAME	YES	YES/ GUEST	NO	YES/NO MEA	Veg Diel	
Aboests, Ahmed, MD	IL-0	TLar GOLar	no	LOINO MLA	reg. Disi	NO MEAL - FASTING - do not hold me
Abuissa, Hussam, MD		z		1		
Agarwal, Himanshu, em'd 6/13		2				Hold moals until 9 pm
Aggarwal, Saurabh		2			z	
Alla, Mahesh, MD	1				1	<b>.</b>
Akinapelli, Abhilash	1				1	
Al-Khafaji, Nawfal		Z			1	Hold meal until 9 pm
Arouni, Amy and Ray			1			
Azzouz, Muhammad	1					
Balmuri, Abilash	1					
Bansal, Ojas		2			1	
Belbase, Ram	1				1	
Bellamkonda, Pallavi		2			1	
Bewtra, Againdra		2				
Biddle, W. Paul	1					
Bodnar, Dawn						
Carollo, Scott						
Carstens, Jeffrey						
		-			-	
Chandraprakasam, Satish, MD		3			3	
Cichowski, Erica			1			
Del Core, Michael MD		2			1	
Dunlay, Robert		2				
Esterbrooks, Dennis MD/Joy		2				
Greenwood, Wendy		1				
Haddad, Toufik		2				
Hee, Tom						
Hilleman, Dan						
Holmberg, Jeff MD/Cheryl			1			
Huerter, Shirley			1			
Hunter, Claire MD/Bill Hunter, MD		z				
Kabach, Amjad	1	-			1	
Kamantha Reddy, Arun	1				1	
Kapalis, Matthew						
Kaushik, Manu, MD						
		2			1	
Kata, Mary Beth	1					
Kingston, Sharon/Kingston, Bill		2				
Koduri, Hemanth			1			
Lynch, Joseph MD/Terri		2				
Mohiuddin, Syed			1			
Mooss, Aryan MD/Cindy		2				
Narmi, Anne						
O'Connor, Stephen						
Pandya, Jittendra		2			z	
Patel, Mitul	1					
Porter, Joann			1			
Pritza, Randy and Judy						
Pritza, Ronald						
Sauray, Alok		2			z	2 Year old - no food
Sketch, Michael, MD		-				
Sketch, Wilchael, WiD Slattery, Terry						
Smer, Aiman		2			z	Hold meals until 9 pm
Thibodeau, Joseph						
Tierney, Dennis						
Van De Graaff, Eric						
White, Michael MD/Jolene			1			
Wichman, Tammy			1			
Williams, Mark				1		COCKTAILS ONLY
Woodruff, Mark		z				
Worthington, Donna						
TOTAL	10	42	•	3	21	





### Flowers/Gifts

### Late May/Early June

- Meet with florist
- Presentation bouquets
   One Week before event
- Finalize order





### Slideshow Presentation(s)

March

- Request 5 family pictures of graduating fellows April
- Request 5 family pictures of graduating fellows
   May
- Request 5 family pictures of graduating fellows
   June
- Request 5 family pictures of graduating fellows
- Finally receive pictures from all of the fellows two days before banquet

Day before the banquet

Make PowerPoint slideshow for dinner





# Congratulations to the graduating Cardiovascular Disease and Interventional Cardiology Fellows of 2017



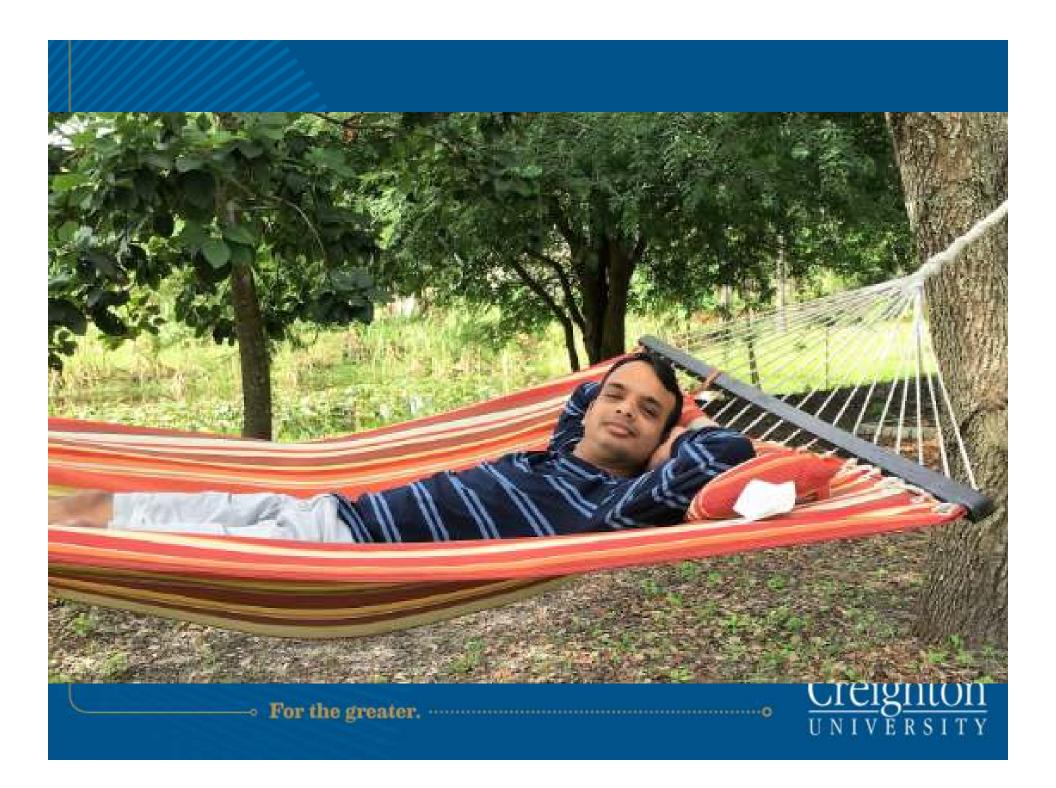












## Details, details!!

Things to consider

For the greater.

- Do you need to move anything from the space you plan to use for the event?
- Is special access to the building needed?
- How will the rental company access the building for pick-up?
- Does security need to be aware of your event?





## Places please!!

#### Do you know?

For the greater.

- What time will movers (if using) be there?
- What time will rentals be delivered?
- What time will awards be delivered?
- What time will flowers be delivered?
- What time will caterers begin setup?





Finally...

# ENJOY THE PARTY!!











































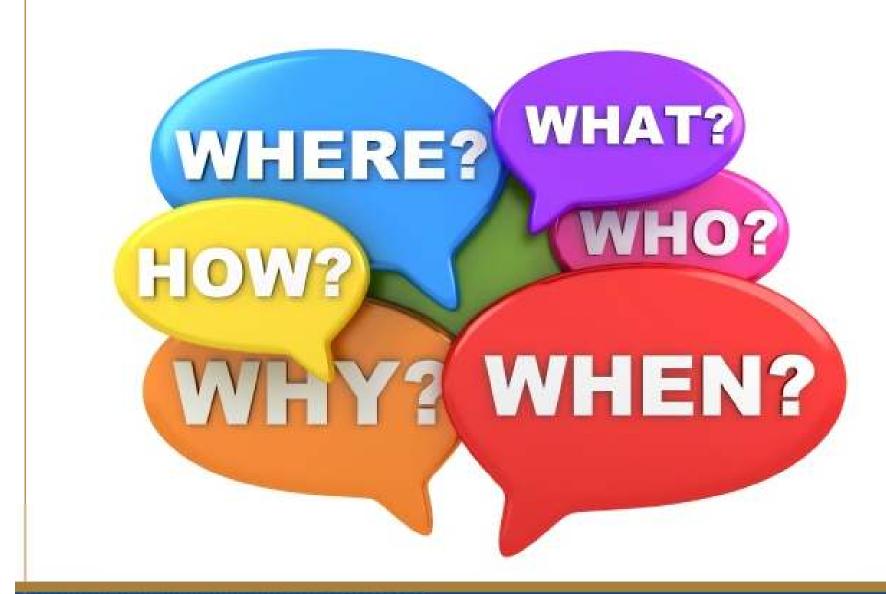
















### Feel free to contact me!!



Wendy Greenwood, C-TAGME Creighton University School of Medicine 402-280-4235 wendygreenwood@Creighton.edu



For the greater.

