

# New Coordinator Workshop



**Thursday, March 22, 2018**

**Sheraton Kansas City Hotel at Crown Center**

**1:00 p.m. – 5:00 p.m.**

# New Coordinator Workshop

Presented by the Association of Family Medicine Administration  
Sheraton Kansas City Hotel at Crown Center

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Thursday, March 22, 2018

- 12:00 – 1:00 p.m.: **Registration**  
[Gillham Hall Foyer – Hotel Lobby Level]
- 1:00 – 3:00 p.m.: **The Essentials**  
[Gillham Hall]  
Cheryl Haynes, BA, C-TAGME  
Bobbi Kruse, AA
- 3:00 – 3:15 p.m.: **Break**
- 3:15 – 4:30 p.m.: **Speed Dating through the Basics**  
The AFMA Board
- 4:30 – 5:00 p.m.: **Q & A**
- 6:00 p.m. **Dutch Treat Dinners**
- 
- 

Saturday, March 24, 2018

- 10:15 – 12:00 p.m.: **NCW & RAD Panel Discussion/Q&A**

## **Note to Attendees:**

Included with your NCW registration will be two follow-up webinars, topics and schedule to be determined.

# Membership Application

## Association of Family Medicine Administration (AFMA)

### BENEFITS OF MEMBERSHIP

- Communication with colleagues on the Discussion List
- Web site with access to the member directory
- Committee participation
- Mentoring Program
- Newsletter
- Audio & Web conferences
- Annual Special Programming - Residency Administration Development (RAD) Workshop, New Coordinator Workshop (NCW), and meeting and networking opportunities in conjunction with the PDW and RPS Residency Education Symposium in Kansas City

### MISSION STATEMENT

The Association of Family Medicine Administration is dedicated to the professional growth and development of its members with particular emphasis on administration and coordination of health care delivery, education, and research within Family Medicine Residency programs.

### VISION STATEMENT

To understand the continuing changes in the health care environment and provide tools to our membership to excel in that environment, as it relates to Family Medicine Residency programs.



[www.afmaonline.org](http://www.afmaonline.org)

Association of Family Medicine Administration  
Attn: Cristin Estes  
11400 Tomahawk Creek Parkway  
Leawood, Kansas 66211-2672  
(800) 274-2237, Ext. 6708  
Fax: (913) 906-6084  
[cestes@aafp.org](mailto:cestes@aafp.org)

**COME LEARN AND  
GROW WITH US!**

**I wish to become a member of AFMA (please print or type)**

Name: \_\_\_\_\_

Degree: \_\_\_\_\_ Title: \_\_\_\_\_

Program Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Phone: \_\_\_\_\_

E-mail: \_\_\_\_\_

Program Director: \_\_\_\_\_

Years in Current Position: \_\_\_\_\_

Years in Healthcare: \_\_\_\_\_

Years in Family Medicine Administration: \_\_\_\_\_

### Program Type (check one)

- ☐ Community Based (program is based in a community hospital and is not affiliated with a medical school)
- ☐ Community Based/Medical School Affiliated (program is based in a community hospital, has a written contractual agreement with a medical school, but is administered by the hospital or other sponsoring institution)
- ☐ Community Based/Medical School Administered (program is based in a community hospital, has a written contractual affiliation with and is administered by a medical school)
- ☐ Medical School Based (program is based and administered by a medical school)
- ☐ Military Program
- ☐ Fellowship(s) \_\_\_\_\_

### Affiliation

- ☐ ACGME Program Number (10 digits) \_\_\_\_\_  
or Pre-Accredited Number
- ☐ AOA Program Number (6 digits) \_\_\_\_\_

### Dues

- ☐ New Member Joining in Jan, Feb, Mar **\$200**
- ☐ New Member Joining in Apr, May, Jun **\$150**
- ☐ New Member Joining in Jul, Aug, Sept **\$100**
- ☐ New Member Joining in Oct, Nov, Dec **\$200 (good thru end of year + next year)**
- ☐ Membership Renewal **\$200 per year**
- ☐ Multiple\* **\$200 first membership / \$150 each additional membership**

*\*Must be submitted with payment in one envelope from the same program*

### Payment

- ☐ Check enclosed in the amount of \$ \_\_\_\_\_

**Please make check payable to the Association of Family Medicine Administration (AFMA)**

**OR**

Charge \$ \_\_\_\_\_ to: ☐ MasterCard ☐ VISA ☐ Discover

Card No: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

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

# Welcome

## Notes

Members of the Association of Family Medicine Administration Board of Directors will present the basic requirements for successfully administering a Family Medicine residency program. Essential elements of both Accreditation Council for Graduate Medical Education accreditation requirements and American Board of Family Medicine certification requirements will be the main focus of this session.

1. Understand the basic ACGME accreditation requirements for a Family Medicine Residency Program.
2. Know the basic ABFM requirements necessary to assure program graduates are eligible for certification upon graduation.
3. Utilize the numerous resources available for the successful administration of a Family Medicine Residency Program.

[illegible]

Attendees will have the opportunity to participate in round table discussions led by seasoned coordinators on the key aspects of residency administration, i.e., schedules, evaluations, recruitment, policies, CCC, milestone reviews, etc. Attendees will also have the opportunity to ask specific questions and obtain samples used by other programs.

1. Build upon essential knowledge of ACGME requirements through examples of real world practices.
2. Advance their knowledge through expert advice from seasoned coordinators for specific program needs.
3. Develop connections with both new and seasoned coordinators to build networks of support.

[illegible]

***Q & A***

## Notes

[illegible]



# NEW COORDINATOR WORKSHOP



AFMA's Third Annual  
New Coordinator Workshop  
March 22, 2018





# What is a resident?

- Residents
  - Graduated from Medical School
  - ARE Doctors
  - Learning Specialty
- Fellows
  - Have completed residency but are training for additional qualifications



# Programs Come in ALL Shapes and Sizes

- University Based
- Community Program
- Rural
- Military



# Graduate Medical Education (GME)

- Undergraduate Medical Education (UME)
  - Medical School
- Graduate Medical Education (GME)
  - Residency and Fellowship
  - Post Graduate Year (PGY) refers to year of training
    - Family Medicine Residents: PGY-1, PGY-2, PGY-3



# ACGME



# Accreditation Council for Graduate Medical Education (ACGME)

- Accrediting body for GME residency and fellowships and the institutions that sponsor them, “Sponsoring Institution”  
[www.acgme.org](http://www.acgme.org)
- Sponsoring Institutions follows Institutional Requirements (IR)
  - Institutional Review Committee
- Programs (Residency and Fellowship) follow Specialty Requirements
  - Specialty (Family Medicine) Review Committee (FM-RC)



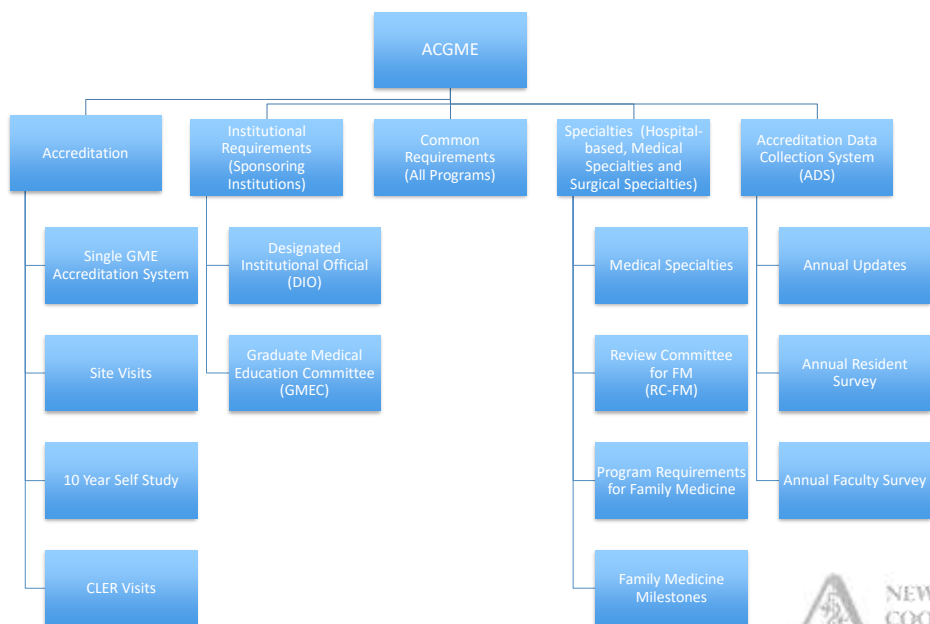
## Sponsoring Institutions (SI)

- Usually a medical school or a hospital
- Accreditation requirements “Institutional Requirements” (IR)
  - Generally handled by Dean’s Office/DIO/GME Office
  - Must maintain Institutional Accreditation
- Financial and Academic Responsibility for GME programs
- Ultimate oversight of ACGME-accredited programs



# Sponsoring Institution

- Designated Institutional Official (DIO) (IR I.A.5.a.)
  - Responsible for ACGME-accredited programs
  - Member of GMEC, may also be the GMEC chair
  - For smaller programs the PD may be the DIO
- Graduate Medical Education Committee (GMEC) (IR I.B.)
  - Oversight of Program Quality
  - Annual Institutional Review (AIR)
- Responsible for Institutional Resources, Policies, Contracts (IR II., IV.)



## Clinical Learning Environment Review FOCUS AREAS



## Institutional Requirements

- [https://www.acgme.org/Portals/0/PDFs/FAQ/InstitutionalRequirements\\_07012015.pdf](https://www.acgme.org/Portals/0/PDFs/FAQ/InstitutionalRequirements_07012015.pdf)



# Program Requirements

- Common:

<https://www.acgme.org/What-We-Do/Accreditation/Common-Program-Requirements>

- Family Medicine:

[https://www.acgme.org/Portals/0/PFAssets/ProgramRequirements/120\\_family\\_medicine\\_2017-07-01.pdf](https://www.acgme.org/Portals/0/PFAssets/ProgramRequirements/120_family_medicine_2017-07-01.pdf)



## ACGME Glossary



**Must:** A term used to identify a requirement which is mandatory or done without fail. This term indicates an absolute requirement.



**Should:** A term used to designate requirements so important that their absence must be justified. A program or institution may be cited for failing to comply with a requirement that includes the term 'should'.



**Suggested:** A term along with its companion “strongly suggested,” used to indicate that something is distinctly urged rather than required. An institution or program will not be cited for failing to do something that is suggested or strongly suggested.



## TWO DIFFERENT REQUIREMENTS



- Rotation time AND a specific number of patient encounters are required.



- Rotation time OR a specific number of encounters are required



## Curriculum Organization and Resident Experiences (Bean Counting)

- **1650 in-person patient visits in FMP site (Clinic visits)**
  - **165 age 60 or over (10% of the 1650)**
  - **165 under 10 (10% of the 1650)**
- 600 hours/**six months** **AND** **750 patient encounters** with hospitalized adult patients (*7 mos*)
- 100 hours/**one month** *or* 15 ICU pt encounters
- 200 hours/2 months *or* **250 adult ED pt encounters**
- 100 hours/**1 month** *or* 125 pt encounters for care of older patient



## Curriculum Organization and Resident Experiences (Bean Counting)

- 200 hours/**2 months** **AND** 250 pt encounters for ill children (3 mos)
  - 75 inpatient
  - 75 emergency dept
- 200 hours/**2 months** or 250 pt encounters children and adolescents in ambulatory setting
- **40 newborn pts**, including well and ill
- 100 hours/**1 month surgical pts**, including hospitalized (3 mos)
  - **Must spend time in operating room**



## Curriculum Organization and Resident Experiences (Bean Counting)

- 200 hours/**2 months** Musculoskeletal/Sports Medicine
- 100 hours/**1 month** or 125 pt encounters for care of women
- 200 hours/**2 months** dedicated to OB (3 mos)
  - Prenatal care, labor management and delivery management
- **100 hours**/1 month dedicated to health system management
- 300 hours/**3 months** elective experience
- **2 scholarly activities**





# Schedules, Agreements and Scholarly Activity



## Schedules

- Annual Block Schedule
  - 12 or 13 Block Schedule?
- Call Schedules
- Individual Rotation Schedules
- Clinic Schedules
- Program dependent



# Agreements

- Institutional Agreements/Contracts
  - Written Agreement of Appointment (IV.B.1.)
    - Required contents (IV.B.2.)
    - Notice of Intent not to renew/Promote (IV.C.1.a)
- Program Agreements
  - Agreement with specialists (I.A.1.- I.A.3.)
  - Program Letter of Agreement (PLA, AIPA) (I.B.1.)



## Scholarly Productivity Minimum Frequencies

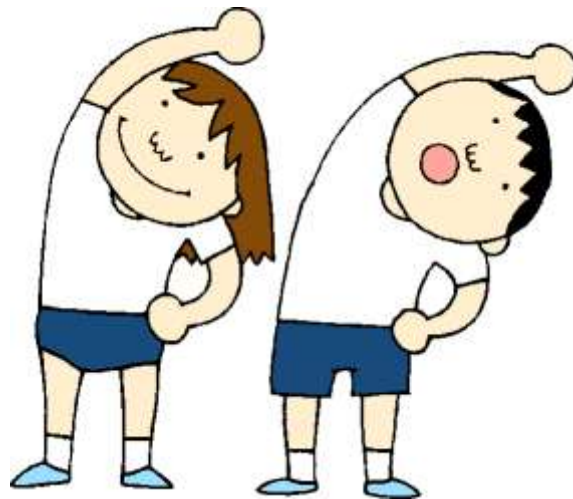
**Residents:** *Two per resident by end of residency.*

**Fellows:** *One per fellow by the end of fellowship.*

**Core Residency Faculty Members:** The Committee considers appropriate role-modeling of scholarship to include at least two entries of the examples listed in the Program Requirements over five years by some faculty members (however, not every member of the physician faculty must demonstrate that numeric goal).

**Core Fellowship Faculty Members:** Average of one per faculty member per year, averaged over five years.





## Evaluations

# Evaluation Basics

- Monthly
  - About resident on rotation
  - About rotation
  - Peers on service
- Semi Annually
  - Milestone Evaluations
- What/Who Must be Evaluated Annually?
  - Program (APE)
  - Faculty
  - Resident 360



# Formative vs. Summative

- Formative
  - Evaluation of resident on rotation
  - Chart Review
- Summative
  - Milestone Review
  - Final Summative Evaluation (FMPR – V.A.3.)



# Milestone Evaluations

Version 9/2013

## SYSTEMS-BASED PRACTICE

The stewardship of the family physician helps to ensure high value, high quality, and accessibility in the health care system. The family physician uses his or her role to anticipate and engage in advocacy for improvements to health care systems to maximize patient health.

SBP-1 Provides cost-conscious medical care					
Has not achieved Level 1	Level 1	Level 2	Level 3	Level 4	Level 5
	Understands that health care resources and costs impact patients and the health care system	Knows and considers costs and risks/benefits of different treatment options in common situations	Coordinates individual patient care in a way that is sensitive to resource use, efficiency, and effectiveness	Partners with patients to consistently use resources efficiently and cost effectively in even the most complex and challenging cases	Role models and promotes efficient and cost-effective use of resources in the care of patients in all settings
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comments:					



## Clinical Competency Committee (CCC)

- Appointed by Program Director
- Semi-annual review of all resident evaluations
- Completes and reports Milestone Reviews
- Advises Program Director regarding resident progress, remediation, promotion, dismissal
- Entered in ACGME ADS twice per year



# Program Evaluations



## PEC

- Program Evaluation Committee (PEC)
  - Appointed by the Program Director
  - Must include at least 2 faculty members and 1 resident
  - Must have a written description of responsibilities
  - Annual Program Evaluation (APE) – Template on ACGME Website
  - Annual curriculum review
  - Monitor and Track: Resident Performance, Faculty Development, Graduate performance, Program Quality, Progress on Previous Year's Plan
  - Recommendations made to faculty for approval



## Annual Review by Family Medicine Review Committee (FM-RC)

- Accreditation Data System (ADS)
  - Statistics about your residency
- Annual Faculty Survey
  - Faculty Support and Teaching, Educational Content, Resources, Patient Safety, Teamwork
- Annual Resident Survey
  - Learning & Working Environment (Duty Hours), Faculty, Evaluations, Educational Content, Resources, Patient Safety/Teamwork
- Milestones
- Board Certification Status
- Faculty Scholarly Activity



## Following the Annual Program Review

- Notification through ADS
  - Accreditation Status
  - List Citations
  - Comment on Concerns/Trends
  - Commend



# Self-Study

- Self-Study (Two parts)
  - Program Self-Study
  - ACGME 10 Year (hopefully) Self-Study Visit
    - 12-18 months before site visit program is notified to initiate self-study



# Reporting Requirements





# WebAds

- <https://apps.acgme.org/connect/login>
  - Username assigned by ACGME
- Data to be reported:
  - Program Info/Structure
  - Faculty & Resident Info/Scholarly Activity
  - Participating Sites
  - Specialty Data



## PATIENT VISIT DETAILS

Number of patient visits in the FMP(s) for each resident active in the program last academic year

Resident Name / Year	Status	Expected Completion Date	# Year 1 FMP Patient Visits	# Year 2 FMP Patient Visits	# Year 3 FMP Patient Visits	Total # FMP Patient Visits
Resident A (1)	Active Full Time	MM/DD/YY	0	0	0	0
Resident B (1)	Active Full Time	MM/DD/YY	0	0	0	0
Resident C (1)	Active Full Time	MM/DD/YY	0	0	0	0
Resident D (1)	Active Full Time	MM/DD/YY	0	0	0	0
Resident E (1)	Active Full Time	MM/DD/YY	0	0	0	0
Resident F (2)	Active Full Time	MM/DD/YY	0	0	0	0
Resident G (2)	Active Full Time	MM/DD/YY	0	0	0	0
Resident H (2)	Active Full Time	MM/DD/YY	0	0	0	0
Resident I (2)	Active Full Time	MM/DD/YY	0	0	0	0
Resident J (2)	Active Full Time	MM/DD/YY	0	0	0	0
Resident K (3)	Completed All Accredited Training (for this specialty) - successfully promoted	MM/DD/YY	0	0	0	0
Resident L (3)	Completed All Accredited Training (for this specialty) - successfully promoted	MM/DD/YY	0	0	0	0
Resident M (3)	Completed All Accredited Training (for this specialty) - successfully promoted	MM/DD/YY	0	0	0	0
Resident N (3)	Completed All Accredited Training (for this specialty) - successfully promoted	MM/DD/YY	0	0	0	0
Resident O (3)	Completed All Accredited Training (for this specialty) - successfully promoted	MM/DD/YY	0	0	0	0

\* Indicates residents did not start at the beginning of year 1 (accepted as transfers)

Note: Programs should keep all data current. If your program has EP-cycle residents that have not graduated yet, report the number of patients seen that far. As soon as they graduate, re-visit this section and update to display their total patient numbers.



## FACULTY SCHOLARLY ACTIVITY

For reporting year 2017-2018, scholarly activity that occurred during the previous academic year (2016-2017)

Faculty Member	PMID1	PMID2	PMID3	PMID4	Conference Presentation	Other Presentations	Chapters Textbooks	Grant Leadership	Leadership or Peer-Review Role	Teaching Formal Courses
Program Director					0	0	0	0	Y/N	Y/N
Assoc. Director					0	0	0	0	Y/N	Y/N
Core Faculty					0	0	0	0	Y/N	Y/N
Core Faculty					0	0	0	0	Y/N	Y/N
Core Faculty					0	0	0	0	Y/N	Y/N
Core Faculty					0	0	0	0	Y/N	Y/N
Core Faculty					0	0	0	0	Y/N	Y/N
Core Faculty					0	0	0	0	Y/N	Y/N
Core Faculty					0	0	0	0	Y/N	Y/N
Core Faculty					0	0	0	0	Y/N	Y/N
Core Faculty					0	0	0	0	Y/N	Y/N
Core Faculty					0	0	0	0	Y/N	Y/N
Core Faculty					0	0	0	0	Y/N	Y/N
Core Faculty					0	0	0	0	Y/N	Y/N
Core Faculty					0	0	0	0	Y/N	Y/N
Core Faculty					0	0	0	0	Y/N	Y/N
Core Faculty					0	0	0	0	Y/N	Y/N

\*Osteopathic Focused



## RESIDENT SCHOLARLY ACTIVITY

For reporting year 2017-2018, scholarly activity that occurred during the previous academic year (2016-2017)

Resident	Year in Program	PMID1	PMID2	PMID3	Conference Presentation	Chapters Textbooks	Participated in Research	Teaching Presentations
Resident 1	1				0	0	Y/N	Y/N
Resident 2	1				0	0	Y/N	Y/N
Resident 3	1				0	0	Y/N	Y/N
Resident 4	1				0	0	Y/N	Y/N
Resident 5	1				0	0	Y/N	Y/N
Resident 6	2				0	0	Y/N	Y/N
Resident 7	2				0	0	Y/N	Y/N
Resident 8	2				0	0	Y/N	Y/N
Resident 9	2				0	0	Y/N	Y/N
Resident 10	2				0	0	Y/N	Y/N
Resident 11	3				0	0	Y/N	Y/N
Resident 12	3				0	0	Y/N	Y/N
Resident 13	3				0	0	Y/N	Y/N
Resident 14	3				0	0	Y/N	Y/N
Resident 15	3				0	0	Y/N	Y/N

\*Osteopathic Focused



## American Academy of Family Physicians (AAFP Census)

- Program type
- Hospital size, number
- Clinic schedule and FQHC status
- Positions offered
- Demographics
- Salary, benefits
- Call and specific rotation information
- Faculty information



## GME Track and FREIDA

- GME Track
  - Association of American Medical Schools and American Medical Association
  - GME Track and National GME Census
    - Details very similar to AAFP annual survey
    - Graduate practice information
- [FREIDA](#) (Fellowship and Residency Electronic Interactive Database Access)
  - American Medical Association
  - Listing of about 10K ACGME-accredited programs students use when considering programs



# American Board of Family Medicine



## American Board of Family Medicine (ABFM)

Resident Training Management System –  
[RTMS Website](#)

- Enter new residents/Update continuing residents
  - Transfer credits
- Order In-Training Examination
- National Graduate Survey
- Verify completion of training for certification



American Board of Family Medicine  
Southern Regional Area Health Education Center/University Hospital Program  
ACGME ID: 1203631220

Resident Training Management System

Resident > Reports > Program Information > In-Training Exam > ABFM Certification Examination

RTM - Main Menu

Select Resident: (Select) ☐

- Add a New Resident**
- Resident Profile**
  - Advanced Placement Credits
  - Medical License Exam Scores
  - Personal Information
  - Resident Training
  - Undergraduate Medical Training
  - Update Resident Status
- Resident Transfers**
  - Transfer into Program
- Reports**
  - Examination Performance Data
  - Program Reader
  - Residency Completion Verification Report
  - Residency Historical Report
  - Resident CCKSA Status Reports
  - Resident ID's and Passwords Report
  - Resident Family Medicine Certification Activity
- Program Information**
  - Residency Program Contact Information
- In-Training Examination**
  - ITE Exam Results
  - Item Analysis
  - Registration
- ABFM Certification Examination**
  - Residency Completion Verification
  - Resident Exam Eligibility
- National Family Medicine Residency Graduate Survey**

**Program Alerts**

- 3 Residency Program Completion Verifications
- 0 Incoming Residents

**Program Statistics**

- 0 PGY-1 Residents
- 0 PGY-2 Residents
- 0 PGY-3 Residents
- 0 PGY-4 Residents
- 0 PGY-5 Residents

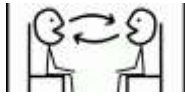
**2017 In-Training Exam Registration**

- 24 Residents Registered
- 0 Residents Not Registered
- \$1,200.00 Registration Fee Amount Due
- \$1,200.00 Registration Fee Amount Paid

AFMA NEW COORDINATOR WORKSHOP

## Board Certification

- **Board Exam Eligibility**
  - Completion of 50 MC-FP points
  - Application and fee for the examination
  - Program confirms eligibility
- **Board Certification Requirements**
  - Successful completion of the Family Medicine Certification Examination
  - Attainment of an active, valid, full, and unrestricted license by December after graduation
  - Completion of family medicine residency training and verification by the program



## 2018 Speed Dating Tables

- |   |                               |
|---|-------------------------------|
| 1. Dashboards/Requirement Trackers – Eileen | 6. Policies - Melissa         |
| 2. Evaluations – Jenny                      | 7. PEC – Cheryl               |
| 3. Event Planning – Erika                   | 8. Recruiting – Annette       |
| 4. Managing Difficult Residents - Tina      | 9. Schedules – Bobbi          |
| 5. Medical Student Rotations – Caren        | 10. Scholarly Activity – Lisa |



# UPCOMING!



## Clinical Competency Committee

Cheryl Haynes, C-TAGME

Thursday, April 12, 2018

2:00 EST



## Websites

- FM Requirements currently in effect

[http://www.acgme.org/Portals/0/PFAssets/ProgramRequirements/120\\_family\\_medicine\\_2017-07-01.pdf](http://www.acgme.org/Portals/0/PFAssets/ProgramRequirements/120_family_medicine_2017-07-01.pdf)

- FM Milestones

<http://www.acgme.org/Portals/0/PDFs/Milestones/FamilyMedicineMilestones.pdf?>

Osteopathic Recognition Milestones

<http://www.acgme.org/Portals/0/PDFs/Milestones/OsteopathicRecognitionMilestones.pdf>



## Resources

- Annual Program Evaluation Template  
[www.acgme.org/acgmeweb/Portals/0/PDFs/SelfStudy/SSProgramEvaluationTemplate.doc](http://www.acgme.org/acgmeweb/Portals/0/PDFs/SelfStudy/SSProgramEvaluationTemplate.doc)
- Self-Study Template  
<http://www.acgme.org/acgmeweb/Portals/0/PDFs/SelfStudy/SSSummary.docx>
- Sample Accreditation Letter  
<http://www.acgme.org/acgmeweb/Portals/0/KeyStandard.pdf>



## Resources

- WebAds  
<https://apps.acgme.org/connect/login>
- ACGME Glossary of Terms  
[http://www.acgme.org/Portals/0/PDFs/ab\\_ACGMEglossary.pdf](http://www.acgme.org/Portals/0/PDFs/ab_ACGMEglossary.pdf)
- ACGME Policies and Procedures  
[http://acgme.org/acgmeweb/Portals/0/PDFs/ab\\_ACGMEPoliciesProcedures.pdf](http://acgme.org/acgmeweb/Portals/0/PDFs/ab_ACGMEPoliciesProcedures.pdf)





# American Board of Family Medicine

- <http://www.theabfm.org>
- <https://www.theabfm.org/cert/residencytraining.aspx>
- <https://www.theabfm.org/cert/index.aspx>
- Kathy Banks, (888) 995-5700, ext. 1295, [Kbanks@theabfm.org](mailto:Kbanks@theabfm.org)
- ABFM Support Center (Certification), (877) 223-7437, [help@theabfm.org](mailto:help@theabfm.org)



## Resources

- American Academy of Family Physicians  
<http://www.aafp.org/home.html>
- AAMC's GME Track  
<https://www.aamc.org/services/gmetrack/>
- AMA's FREIDA  
<http://www.ama-assn.org/ama/pub/education-careers/graduate-medical-education/freida-online.page?>



## AFMA Resources - [www.afmaonline.org](http://www.afmaonline.org)

- List serve/Forum
- Mentor
- AFMA Member Directory
- Webinars/Chat Rooms
- *Practical Guide for the Administration of Family Medicine Residency Programs*



## Don't forget to -

- **Fill out your evaluations.**
- **Pick up your certificate of attendance.**
- **Meet for Dutch Treat Dinners TONIGHT – 6 p.m.**
- **Attend the Q&A Session on SATURDAY – 10:15 a.m.**
- **Become a member of AFMA!**
- **Get involved – Join a Committee!**





# **NEW COORDINATOR WORKSHOP**

## OUTLOOK MANAGEMENT EAST PIERCE FAMILY MEDICINE (PUYALLUP, WA)

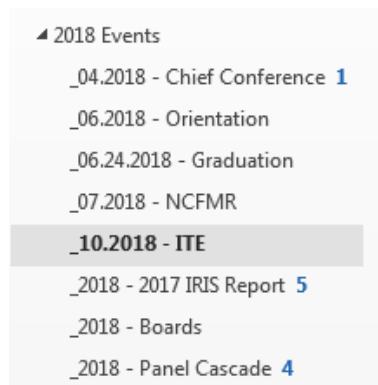
### COORDINATOR ROLE

If you are new to the Coordinator role (and even if you aren't) – the amount of concurrent projects and deadlines can be overwhelming.

Here is a system that works well for me and hopefully you can take back a nugget of information that might be helpful to you.

### Project Management

I set up Outlook using a folder for each event. Outlook folders in theory drive me nuts, because the search capabilities are strong in Outlook. But after doing this for almost a decade there is something about each event having its own folder. I can go back year after year and see when Kathy Banks sent the dates out for the next year's ITE or Board Certification Exam. When an email isn't related to an event or project, it goes to my general archive.



As soon as the event is over, it goes into a separate archive folder.

### Email Management

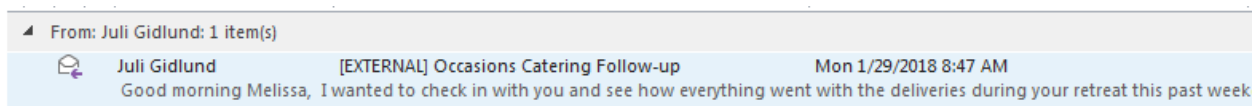
- Use Rules. Examples of Rules I use are:
  - All emails from AFMA Board members automatically are coded with a AFMA Board Category tag. Then I can sort by that category and get caught up on what I missed.
  - AFMA list-serve emails go to a folder that I can check throughout the day.
  - I sent out a lot of meeting requests to Residents and Faculty, only Tentative and Declined responses go to my Inbox. The rest go to a separate folder that I will check for notes weekly.
  - Newsletters and IT emails go to separate folders that I check occasionally or when I am sitting in the car waiting for a kid.
- I don't like a lot of emails in my Inbox. My goal is 100 or less in my inbox.

- For me the more emails I have in my Inbox, the more likely I am to miss something important.
- As I complete tasks, they go into the event folder or into the archive folder.

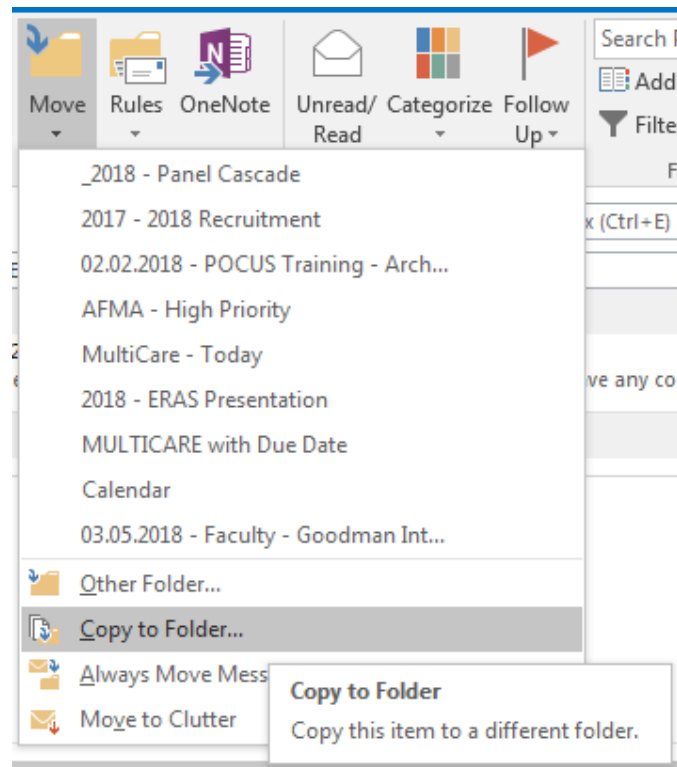
## Task Management

I use a combination of electronic and written to do lists, but every email that comes through with a due date gets copied to the Tasks tab. Emails that require a quick response back, do not go into Tasks.

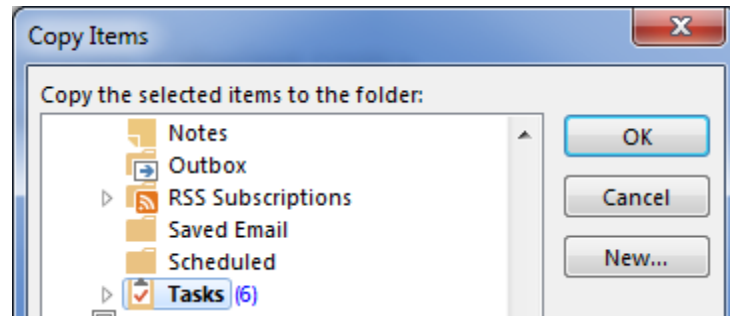
For the example here, I received an email from our Resident / Faculty Retreat Catering Coordinator wanting to know how our event went. She happened to send it the day I was preparing to leave on vacation and there was no way it was getting done until I returned.



- So I went up to the “Move” folder and then went down to “Copy to Folder”



- Then you click on the “Tasks” folder and click “OK”



- The email will then open up in a Task with the Subject tab auto-populated along with the email in the notes field.
  - You can then set a due date and a category.
  - You can also “Assign” the task to someone else.

## IN-TRAINING EXAMS (ITE) EAST PIERCE FAMILY MEDICINE (PUYALLUP, WA)

### COORDINATOR ROLE

Start by going to the RTMS website

<https://rtm.theabfm.org/>

Enter your user name and password.



The screenshot shows the login page of the Resident Training Management System. At the top left is the American Board of Family Medicine logo. The page title is "Resident Training Management System". Below the title, there is a "Welcome to the Resident Training Management System" section with a brief description of the system's purpose. To the right of this section is a login form with fields for "User Name" (containing "1205400711") and "Password" (containing "\*\*\*\*\*"). A "Log in" button is located below the password field. Below the login form, there is a note stating: "Log in to the System with the username and password that were supplied to your program by the ABFM. Note: This is NOT the same username and password that Physicians use to access their individual information on theABFM.org web site."

After logging in, the main menu looks like this



The screenshot shows the main menu of the Resident Training Management System after logging in. At the top, there is a header with the American Board of Family Medicine logo, the program name "MultiCare Good Samaritan Hospital Program", and the ACGME ID "1205400711". Below the header is a navigation bar with tabs: "Resident", "Reports", "Program Information", "In-Training Exam", and "ABFM Certification Examination". The "In-Training Exam" tab is currently selected. Below the navigation bar, there is a "Selected Resident:" dropdown menu with "(Select)" as the option. The main content area is divided into three columns. The left column contains links for "Add a New Resident", "Resident Profile" (with sub-links: Advanced Placement Credits, Medical License Exam Scores, Personal Information, Resident Training, Undergraduate Medical Training, Update Resident Status), "Resident Transfers" (with sub-link: Transfer into Program), and "Reports" (with sub-links: Examination Performance Data, Program Roster, Residency Completion Verification Report, Residency Historical Report, Resident CKSA Status Reports, Resident ID's and Passwords Report, Resident Family Medicine Certification Activity Status Report, Resident Family Medicine Certification Activity Completion Report). The middle column contains links for "Program Information" (with sub-link: Residency Program Contact Information), "In-Training Examination" (with sub-links: ITE Exam Results, Item Analysis, Registration), "ABFM Certification Examination" (with sub-links: Residency Completion Verification, Resident Exam Eligibility), and "National Family Medicine Residency Graduate Survey". The right column contains three summary boxes: "Program Alerts" (showing 0 Residents Pending Program Completion Verification and 0 Incomplete Residents), "Program Statistics" (showing counts for PGY-1 through PGY-5 Residents), and "2017 In-Training Exam Registration" (showing counts for Registered, Not Registered, and Fee Amount Owed/Paid).

## Enter New Residents / Update Continuing Residents

Each year you will need to add your new Residents into RTMS, update your new R2's and R3's, and Verify Completion of Training for Certification.

### Incoming Residents

I prefer to do this step once June Orientation has started. That way, their work email is up and running.

- Click on "Add a New Resident"
  - Fill out all of the information requested below.
  - Then click on "Add Resident & Continue"

**Add Resident**

Please provide the resident's email address. This email address will be used by the ABFM to communicate with the resident regarding ABFM certification requirements.

**EMAIL ADDRESS:** Please provide a unique email address that the physician has access to and is not used by any other ABFM physician.

First Name  \*

Middle Name

Last Name  \*

Gender ☒ Male ☐ Female \*

Suffix  (Select) ▼

Degree  (Select) ▼ \*

Date of Birth  mm/dd/yyyy  (mm/dd/yyyy) \*

Last Four Digits of SSN  \*

Resident Email Address  \*

Re-Enter Email Address

- You will receive a message saying that ABFM sent the Resident an email with more information.
- Fill out the fields below and then click "Update Training Info & Continue" button
- Follow the directions in the Promotion section below to add "Resident Training"

### Undergraduate Medical Training

To add Medical School Training Information, please complete the fields below.

Country of Medical School ☒ US/Canada ☐ Other \*

Name of Medical School  (Select) ▼ \*

End Date  mm/dd/yyyy  (mm/dd/yyyy) \*



## R1 and R2 Promotion

- Go up to “Selected Resident” and choose your first resident (I do them alphabetically by class)
- Then you must click on the link that says “View Dr. XX’s Profile”
- Click on “View Details” on the Resident Training widget.
- Then click on “Add Resident Training”

ACGMEID	Program Name	Program Year	Start Date	End Date	Credits		
1205400711	MultiCare Good Samaritan Hospital Program	PGY-1	7/1/2017	6/30/2018	12	<a href="#">Edit</a>	<a href="#">Delete</a>


[Add Resident Training](#)[Return to Resident Profile](#)[Return to RTM Main Menu](#)


- Then you will update Resident Training Info for the next Academic Year

Program ACGMEID 1205400711

Training Year  \*

Training Type  \*

Start Date   (mm/dd/yyyy) \*

End Date   (mm/dd/yyyy) \*

Vacation Days  \*

Credits  \*

Notes

(0/255 Characters)

[Update Resident Training Info & Continue](#)[Cancel](#)

- In the notes section you would describe why they are off-cycle and what their new end date would be. I always send the same email to Kathy Banks so she is aware.
- Vacation Day – how this is tracked is a Program by Program decision.
- Credits = how many months did they get credit for.
- Click on the “Update Resident Training Info & Continue” button

## Transfer Credits

This section is only focused on the ABFM requirements to enter transfer credits. The ACGME has additional requirements as well.

United States and Canada Programs may admit a resident into training with credit toward certification in the amount of 12 months or less for residents transferring from:

- ACGME-accredited Family Medicine programs
- other ACGME-accredited specialties
- American Osteopathic Association (AOA) approved programs
- Canadian programs approved by the College of Family Physicians of Canada

<https://www.theabfm.org/cert/advlevel.aspx>

RTM > Main Menu > Resident Transfer

### Resident Transfer Search


\* Indicates Required Field  
To search for a Family Medicine resident in an ACGME accredited program, please fill in the fields below and click "Search".

To transfer a resident into your program, the resident must be updated in RTM by the previous training program to reflect the completed credits and training dates at that program. Training records in RTM which indicate that a resident is currently enrolled in another program must be updated before a transfer can occur in RTM. If the resident has already left a program, please contact the ABFM at 888-995-5700, ext. 1295 for assistance.

From Residency Program

First Name

Last Name

Date of Birth   (mm/dd/yyyy) \*

Last four digits of SSN

## In-Training Exam Procedures for EPFM

The ABFM makes it easy to register for the exam – walking you through each step one at a time.

### In-Training Examination Registration

✓ Step 1: Update ITE Contact Information	✓ Step 2: View ITE Proctor's Manual	ITE Important Dates								
<p>To begin the In-Training Exam Registration Process, click <b>"Update Contact"</b> to confirm or edit your contact information. The ABFM requires this information so we may send you important information regarding the In-Training Examination.</p> <p><a href="#">Update Contact</a></p>	<p>The ITE is available only as a computer based exam and you will no longer receive an exam shipment of printed materials. The ITE Proctor's Manual which contains important information and instructions for the exam administration can be printed and/or downloaded to your desktop by clicking <b>"View Manual"</b> below. You must complete this step to proceed to registration.</p> <p><a href="#">View Manual</a></p>	<table><tr><td>1st Day to Register</td><td>July 21, 2017</td></tr><tr><td>Last Day to Register</td><td>September 30, 2017</td></tr><tr><td>Last Day for Changes</td><td>October 6, 2017</td></tr><tr><td>Examination Dates</td><td>October 23-27, 2017</td></tr></table>	1st Day to Register	July 21, 2017	Last Day to Register	September 30, 2017	Last Day for Changes	October 6, 2017	Examination Dates	October 23-27, 2017
1st Day to Register	July 21, 2017									
Last Day to Register	September 30, 2017									
Last Day for Changes	October 6, 2017									
Examination Dates	October 23-27, 2017									
<p>✓ Step 3: Register ITE Examinees</p> <p>All residents taking the 2017 In-Training Exam must be registered by September 30, 2017.</p> <p>Click <b>"Register Examinees"</b> to register your residents. To view residents you have already registered click <b>"Examinee Roster"</b>.</p> <p>Residents Registered: 18      <a href="#">Examinee Roster</a> Residents Not Registered: 0</p> <p><a href="#">Register Examinees</a></p>	<p>✓ Step 4: Make ITE Payment</p> <p>All examination fees must be paid before the In-Training Examination results will be released. <b>Payment Status</b> details the current processing status of your purchase. If you would like a receipt of your purchase, click <b>"Payment Receipt"</b>.</p> <p>The cost of the ITE is \$50 per resident.</p> <p>Click <b>"Make Payment"</b> to proceed to ITE payment.</p> <p><b>Payment Status</b>      <a href="#">Payment Receipt</a> Payment Completed</p> <p><a href="#">Make Payment</a></p>									

Step 1 – Update your Contact Information

Step 2 – Review the Proctor's Manual.

- Each year, I still look through it to see if there have been any major changes

Step 3 – Register Examinees

Step 4 – Pay for the Exams.

- The cost is \$50 per Resident

Vacations/CME are not allowed during ITE Weeks – sometimes there is some flexibility on the date.

### EPFM Timeline

When	What
Early Nov	<ul style="list-style-type: none"> <li>• Sent out meeting request as soon as you get the dates of the exam.</li> <li>• Copy PD and Scheduler.</li> <li>• Most Residents take the exam Thursday afternoon during regularly scheduled Didactic Time.</li> </ul>
Spring / Early Fall	<ul style="list-style-type: none"> <li>• After scheduled are decided for the next academic year, figure out when Night Float and MB Peds Residents will be taking the exam and update their calendars.</li> </ul>
Early August	<ul style="list-style-type: none"> <li>• Register and pay for the Exam</li> </ul>
Week Before the Exam	<ul style="list-style-type: none"> <li>• Remind Residents about the exam</li> <li>• Send email to Residents who will not be taking the exam of expectations during the exam (Didactics / Admin Time) and remind them that they will not have access to the Resident Room</li> </ul>
Week of the Exam	<ul style="list-style-type: none"> <li>• Send email to the Residents taking the exam with information on how to download the test browser.</li> <li>• We have found Residents have to use an internet browser installed on the computer, not through Citrix or Remotely.</li> <li>• They recommend you test the browser before exam day, but often we don't have time.</li> </ul>
Before the Exam	<ul style="list-style-type: none"> <li>• Remind them of the upcoming exam</li> <li>• Buy snacks and water</li> <li>• Make sure to have earplugs available</li> </ul>
Day of Exam	<ul style="list-style-type: none"> <li>• Send Tiger Text in the morning reminding them of the exam</li> <li>• Proctor – Be in the Room helping download the browser</li> </ul>
Day of Exam	<ul style="list-style-type: none"> <li>• Stay in the Room to supervise and answer questions as necessary</li> </ul>
After the Exam	<ul style="list-style-type: none"> <li>• Test scores will come in 6 to 8 weeks after the exam is given.</li> <li>• Print a copy of the test results and give them to the PD for review.</li> <li>• After they have reviewed the results, you will print a copy of the report for each person and put it in a sealed envelope in their box.</li> <li>• Enter scores in New Innovations.</li> </ul>

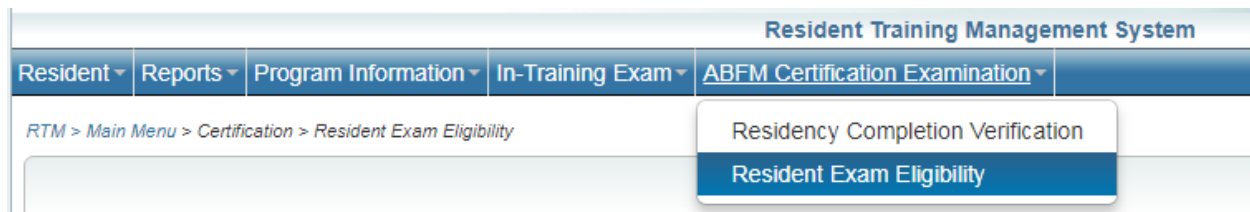
BOARD EXAM ELIGIBILITY  
EAST PIERCE FAMILY MEDICINE (PUYALLUP, WA)

COORDINATOR ROLE

**Program Director / Coordinator Responsibilities before Application Opens**

In the days before the Board Exam application opens for Residents, make sure to go into "Resident Exam Eligibility" to confirm there are no alerts.

The most common alert is, Residents who are completing Residency after June 30<sup>th</sup> and before October 18<sup>th</sup>. See bolded section below to clear that flag.



The following list includes all residents in your program and their status to be able to apply for the 2018 Spring Family Medicine Certification Examination. Those residents that have complete training information submitted in RTM and are completing training by June 30, 2018 will be able to self-activate their online application through their ABFM physician portfolio. **Any resident that will complete training after June 30, 2018 and no later than October 31, 2018 can be approved below by the residency program to apply for the examination.**

To activate a resident for the upcoming examination application, click the 'activate' link for the specific resident. Only those residents completing training between July 1, 2018 and October 31, 2018 can be activated to apply for the upcoming examination.

Any resident that has a training requirement alert will be flagged below. To review the requirement alert for a resident, click on 'view profile' for the specific resident.

Last 4 Digits SSN	Training Year	Training Completion Date	Exam Status	Application Activity	Resident Profile
7426	PGY-3	7/14/2018	Application Started	Activated 12/1/2017	<a href="#">View Profile</a>
2833	PGY-3	6/30/2018	Application Started	Activated 12/2/2017	<a href="#">View Profile</a>

## Timeline

You will receive a variation of this email from Kathy Banks (kbanks@theabfm.org) each November.

This email provides important information for you and your residents regarding the application process and schedule for the April 2018 administration of the certification examination. The application will be available beginning December 1, 2017.

A schedule of important dates appears below. Please encourage your residents to start the application early. They may apply and pay their exam fee prior to obtaining their permanent medical license and prior to completion of the required Family Medicine Certification activities. However, to schedule an exam location and date, they must have met the 50 minimum required Family Medicine Certification Activity points no later than February 23, 2018. They must obtain and report that they have been issued a permanent medical license to gain certification status after a successful examination.

Residents who are in good standing and expected to complete training by June 30, 2018 are automatically eligible to take the April 2018 examination. Anyone completing training between July 1 and October 31, 2018 will require activation via the RTM site once the application opens.

Family Medicine Certification Examinations 2018	
SPRING EXAMINATIONS 2018	
Registration Begins (online applications available)	December 1, 2017
<b>First Deadline to Submit Online Application (no late fee assessed)</b>	<b>January 19</b>
Priority Seating Ends (for best seating options, select a testing center by this date)	February 9
Final Deadline to Submit Online Application (requires a \$100 non-refundable late fee)	February 23
Deadline to Submit Special Testing Accommodations Documentation	February 23
Deadline to Complete All Certification Activity Requirements for Examination	February 23
Deadline to Clear Pending Requirements (except license & completion of training)	March 15
Deadline to Make Official Name Change with ABFM for Examination	March 15
<b>Deadline to Select Testing Date/Location</b> <i>Note: There will be limited seating for anyone selecting a test center after February 10.</i>	<b>March 23</b>
All Family Medicine Residency Training Must be Completed	June 30*
Deadline to Withdraw from Examination without Cancellation Fee	30 days prior to scheduled exam
Deadline to Withdraw from Examination without Seat Fee	5 days prior to scheduled exam
Deadline to Change Testing Date/Location	48 hours prior to scheduled exam
<b>Spring Examination Dates</b>	<b>April 5, 6, 9, 10, 11, 12, 13, 14, 16, 17, 18 &amp; 19 (2018)</b>
Examination Results (tentative)	June 15

(\* Residents who are in good standing and expected to complete training by June 30, 2018 are eligible to take the April 2018 examination. Anyone completing between July 1 and October 31, 2018 will require Program Director approval. Anyone completing after October 31, 2018 should plan to take the exam in the next administration window.)

### **What do you need to know from the email above?**

- They may apply and pay their exam fee prior to obtaining their permanent medical license and prior to completion of the required Family Medicine Certification activities.
  - R3's can apply and pay even if they do not have a full license and if they haven't completed their Certification activities. This is important. We budget for this expense in the current year and need to pay for it accordingly.
- To schedule an exam location and date, they must have met the 50 minimum required Family Medicine Certification Activity points no later than February 23, 2018.
  - The information above says they can apply and pay if they do not have a permanent license and / or if they haven't completed their Certification activities. This bullet says they can apply and pay, BUT they can't schedule an exam date and location.
- They must obtain and report that they have been issued a permanent medical license to gain certification status after a successful examination.
  - Residents do not need a permanent license to apply, pay, or take the Board exam, but they will not be granted Board Certification until they have a permanent license.
- Residents who are in good standing and expected to complete training by June 30, 2018 are automatically eligible to take the April 2018 examination. Anyone completing training between July 1 and October 31, 2018 will require activation via the RTM site once the application opens.
  - If a Resident will not graduate by June 30<sup>th</sup> because of leave or other circumstances, they can still take the Spring exam, but they will need PD approval to do so
    - Go into their record the ABFM Certification Examination. Find their name and you can approve their exam status.

### **Payment**

We do not require Residents to pay for the exam and get reimbursed when they have passed the exam. We also do not require Residents to pay for the exam and be reimbursed, unless they would like to pay and be reimbursed. Our preferred payment source is the PC credit card with the Resident providing a receipt to the PC.

We will pay the exam fee, but we do not pay late fees if the Resident registers after the first deadline.

### **Exam Date**

As you can see from the email above, there are a variety of dates over a 2-week period. As soon as the Resident's date is confirmed, they need to turn in a Time Off Request form. Test day is charged as an Admin Day.

- If the R3 is on an inpatient rotation, they need to work with the Chief's and PD, to make sure their rotation is covered.

### **Results**

Results usually come back a few weeks before graduation. As part of their contract, they agree to give us a copy of their scores.

VERIFY COMPLETION OF TRAINING  
EAST PIERCE FAMILY MEDICINE (PUYALLUP, WA)

COORDINATOR ROLE

Program Directors can go into RTMS and verify Resident completion within 15 days of graduation.

Resident Training Management System

Resident

Reports

Program Information

In-Training Exam

ABFM Certification Examination

RTM > Main Menu > Certification > Residency Completion Verification

Residency Completion Verification

Resident Exam Eligibility

When there are Candidates pending Residency Completion Verification, their records would be below to approve.

Resident Exam Eligibility

Residency Program Completion Verification

ABFM ID Code	Last Name	First Name	Date of Birth	Last 4 Digits SSN	Training Year	Training Completion Date	Click to Verify Satisfactory Completion	Reason for <u>NOT</u> Verifying <small>limited to 7000 characters</small>
Currently there are no Candidates pending Residency Completion Verification for your program. Only candidates who are within 15 days of their Residency Completion date will be available for viewing and verification.								



BLANK ITE EXAMS  
EAST PIERCE FAMILY MEDICINE (PUYALLUP, WA)

COORDINATOR ROLE

Faculty will sometimes ask for blank ITE exams either to look for questions relating to a topic they are presenting or to use as a study aide for a Resident.

- Go to <https://rtm.theabfm.org>
- User Name – 1205400711
- Password – 375614

▶ **In-Training Examination**

ITE Exam Results

Item Analysis

Registration



- Pick the year you want to look at
- Go to the bottom of the page and look for the files that include:
  - Multiple-Choice Questions
  - Critique Book



Click [here](#) to receive the **2017 Exam Book: Multiple-Choice Questions** in PDF format.



Click [here](#) to receive the **2017 Exam Book: Critique Book** in PDF format.

When you click on the link, it will open in a PDF.