

# USER MANUAL – PROMOTION DASHBOARD

**TARGET AUDIENCE: ADMINISTRATORS**

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Updated September 8, 2021

## PROMOTION DASHBOARD

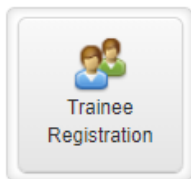
Programs promote their own learners through MedSIS. Promoting learners means that they are “promoted” into their next training level. Once a learner is promoted, they will have a training line for the next academic year and therefore can begin the registration process/appear in the next academic year’s rotation schedule.

If learners do **NOT** get promoted:

- **They cannot register into the program**
- **They cannot get licensed to train**
- **They cannot be entered into the 21/22 rotation schedule**

## HOW TO SET UP YOUR PROMOTION DASHBOARD

Click on the Trainee Registration module:



In the Trainee Registration module, there are 4 approval statuses that determine the status of promotion:

1. **NEW** - Promotion line automatically generated by the system, waiting for a PA to review/approve
2. **DRAFT** - PA modified a training line and clicked “save” but not submitted
3. **PENDING APPROVAL** - PA created/updated a system generated training line and submitted. This training line must be approved by the Postgrad Office
4. **APPROVED** - PA had no changes required to a system generated training line and submitted. This line does not require PG approval

**Trainee Search**

Student #:

Last Name:

First Name:

**Registration**

Training Session:

Trainee Status:  Draft  Historical  New  Returning  
 Withdrawn  N/A

Trainee Type:  Trainee  Elective  N/A

Registration Status:  Pre-Registered  Registered  Ready  
 Not-Ready  Withdrawn  N/A

**Training**

Approval Status:

Training Status:

Department:

Program:  Approved

Funding Type:  Draft

Training Level Type:  New

Pending Approval

1. Click on the training status of the next academic year and the status of 'New' to capture all trainees that require promotion. (ex. currently 2020-2021 so I will choose 2021-2022).

Registration

Training Session: 2021 - 2022

Trainee Status:  Draft  Historical  New  Returning  
 Withdrawn  N/A

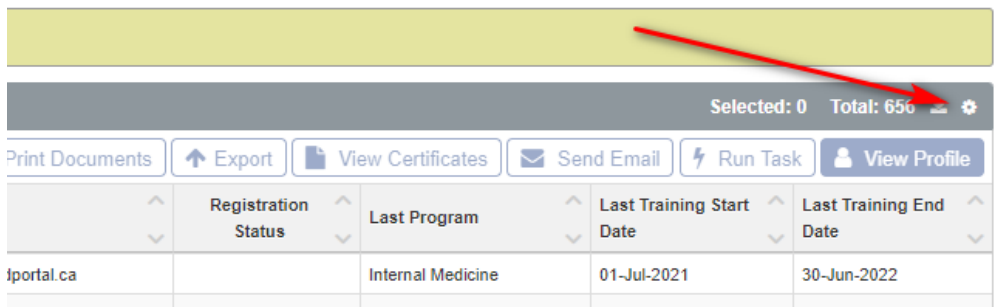
Trainee Type:  Trainee  Elective  N/A

Registration Status:  Pre-Registered  Registered  Ready  
 Not-Ready  Withdrawn  N/A

Training

Approval Status: New

2. Click on the gear icon in the top right corner of the search screen to set your filters for promotion.



Selected: 0 Total: 656

Print Documents Export View Certificates Send Email Run Task View Profile

	Registration Status	Last Program	Last Training Start Date	Last Training End Date
portal.ca		Internal Medicine	01-Jul-2021	30-Jun-2022

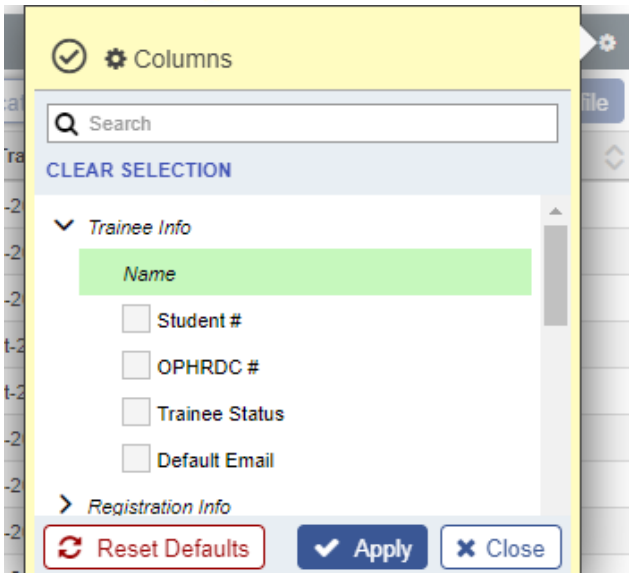
3. Choose the following filter options:

Trainee Info:

- Name (defaulted)

Last Training Line:

- Last Program
- Last Training Start Date
- Last Training End Date
- Last Training Approval Status
- Last training Completion Status



### Last Training Completion Status

The last training completion status determines whether the learner will complete training at the end of the current academic year **OR** continue training into the next academic year.

- a) **Continue Training** - After the promoted training line has been completed, learner is expected to return for the 22/23 academic year
- b) **Completed Training** - After the promoted training line has been completed, learner has completed all required years of the program. Learner WILL receive a training certificate
- c) **Ended Training** - After this training line has been completed, the learner is NOT returning to the program and did not complete all years of the program. Learner will NOT receive a training certificate.

Last Training Completion Status
Completed Training
Continue Training
Completed Training
Continue Training
Continue Training
Completed Training

## How to Promote Your Learners

There are 2 options to promote a learner:

**Option 1 - Directly from the trainee search screen (bulk approval)**

**Option 2 - Drilling into an individual trainee's details to approve**

### Option 1: Bulk Approval (best practice)

Tag all learners that do not have any issues based on the promotion report and submit. You can also select all using the checkbox beside "name" at the top. These learners will NOT go through the PG Office for Approval.

The screenshot shows a 'Trainee Search Result' table with a 'Run Task' dialog box overlaid. The dialog box contains a dropdown menu with 'Submit Training' selected, and 'Start' and 'Close' buttons. A red arrow points to the 'Run Task' button in the top right of the search results area.

Name	Specialty	Start Date	End Date	Approval Status	Last Training Completion Status
Abdali, Danyal					Completed Training
Abdali, Talal	Anesthesiology	01-Jul-2021	30-Jun-2022	New	Continue Training
Abu Halimah, Jalal Hamoud A.	General Surgery	27-Jul-2021	04-May-2022	New	Completed Training
Abu-Ghazaleh, Nadine	Family Medicine	21-Oct-2021	30-Jun-2022	New	Continue Training
Adili, Anthony	Physical Medicine And Rehab	27-Oct-2021	30-Jun-2022	New	Continue Training
Afzaal, Tamoor	Internal Medicine	01-Jul-2021	30-Jun-2022	New	Completed Training
Ahangar, Pouyan	Orthopedic Surgery	01-Jul-2021	30-Jun-2022	New	Continue Training
Ahmad, Arsalan	Family Medicine	01-Jul-2021	30-Jun-2022	New	Completed Training
Ahmadi, Bilal	Pediatric Neurology	01-Jul-2021	30-Jun-2022	New	Continue Training
Ajian, Muhammad Abdulbaqi A	Cardiology	01-Jul-2021	30-Jun-2022	New	Continue Training
Al Majarafi, Nasser	Internal Medicine	22-Sep-2021	30-Jun-2022	New	Continue Training
Al Magrashi, Zainab Ali Amer	Internal Medicine	22-Sep-2021	30-Jun-2022	New	Continue Training
Al Sagre, Ali Ateaya H.	Emergency Medicine	01-Jul-2021	01-May-2022	New	Completed Training

Once submitted, these learners will be considered fully promoted and will update to a status of 'Approved' under the Approval Status in their training line.

Program	Training Level	Funding Source	Funding Category	Training Status	Start Date	End Date	Type	Reg'n Status	Pool	FTE	Waiver	Completion Status	Approval Status	Alerts
Obstetrics And Gynecology	PGY3	Ont Min Hlth- CIMG	Regular MOH Funding/Clinical Education	Active	01-Jul-2021	30-Jun-2022	Trainee				N	Continue Training	Approved	

### Option 2: Individual Learner Approval

Select all learners and choose "View Profile":

Registration Info: Training Session: 2021 - 2022 Approval Status: New

Trainee Search Result Selected: 656 Total: 656

Search:  
[Print Documents](#) [Export](#) [View Certificates](#) [Send Email](#) [Run Task](#) [View Profile](#)

<input checked="" type="checkbox"/>	Name	Registration Status	Last Program	Last Training Start Date	Last Training End Date	Last Training Approval Status	Last Training Completion Status
<input checked="" type="checkbox"/>	Abdali, Daniyal		Internal Medicine	01-Jul-2021	30-Jun-2022	New	Completed Training
<input checked="" type="checkbox"/>	Abdali, Talal		Anesthesiology	01-Jul-2021	30-Jun-2022	New	Continue Training
<input checked="" type="checkbox"/>	Abu Halimah, Jalal Hamoud A.		General Surgery	27-Jul-2021	04-May-2022	New	Completed Training
<input checked="" type="checkbox"/>	Abu-Ghazaleh, Nadine		Family Medicine	21-Oct-2021	30-Jun-2022	New	Continue Training
<input checked="" type="checkbox"/>	Adili, Anthony		Physical Medicine And Rehab	27-Oct-2021	30-Jun-2022	New	Continue Training

Click on program name to edit training line details:

Training Lines [+ Add Training](#)

Session 2021 - 2022 [Edit Registration](#)

Program	Training Level	Funding Source	Funding Category	Training Status	Start Date	End Date	Type	Reg'n Status	Waiver	Completion Status	Approval Status	Certificate Status	Alerts
Internal Medicine	PGY3	Ont Min Hlth- Ministry Funded	Regular MOH Funding/Clinical Education	Active	01-Jul-2021	30-Jun-2022	Trainee		N	Completed Training	New		

Make any necessary changes and outline the changes in the comment field. There will be a warning when you submit to confirm all change made.

Training Profile New

Session 2021 - 2022 - Edit Training

Trainee Type\*: Trainee

Training Program\*: Internal Medicine

Training Level\*: PGY3

Training Status\*: Active

Location: --Select--

Base Location: Hamilton Region

Payment Agent: --Select--

Waiver:  NO

Base Program\*: Internal Medicine

Funding Source\*: Ont Min Hlth- Ministry Funded

Training Status Detail: --Select--

Employment Type\*: FULL TIME

Start Date\*: 01-Jul-2021

End Date\*: 29-Jun-2022 Changed End Date

Training Completion

Training Completion Status\*: Continue Training

Comments:

Promotion Date:

Training Line changed.

Changes to the Training Line will be validated by the PG Administrator. The Training Line status will change to Pending Approval!

Are you sure you want to submit the form?

History Last modified on 22-Feb-2019, 10:15 by K4Y Admin. 
[Submit](#) [Save](#) [Delete](#) [Cancel](#)

Once the updates to the line are submitted, the Approval Status will update from "New" to "Pending Approval". Postgrad will review and approve the updates.

Training Lines														
Session 2019 - 2020														
Program	Training Level	Funding Source	Funding Category	Training Status	Start Date	End Date	Type	Reg'n Status	Pool	FTE	Waiver	Completion Status	Approval Status	Alerts
Obstetrics And Gynecology	PGY2	Ont Min Hlth-Ministry Funded	Regular MOH Funding/Clinical Education	Active	01-Jul-2019	26-Jun-2020	Trainee				N	Continue Training	Pending Approval	●

● Trainee is not fully promoted.

## Postgraduate Office Role

PG Office will review training lines submitted by programs with a status of “Pending Approval”

- Comments made by the program will be used by the PG office to support changes submitted.

Once the training line has been reviewed by PG, the line will be saved and show as “Approved”.

- NOTE: There is no feedback sent to the program once approved – Postgrad will contact you directly if necessary.

PG will monitor all learners with training lines with a status of “Pending Approval” until all learners are “Approved”.

## How to See an Overview of Learners Promotion Statuses

Once all your learners have been promoted, you can look at an overview of all learner statuses.

1. Go to the Trainee Registration Module
2. On the main trainee registration screen, choose all four options under the “Approval Status” filter and click “Search”:

▼ Training

Approval Status: New, Approved, Draft, Pending Approval

Department:

Funding Type: [Clear Selections](#)

Training Status:  New

Type of Training:  Approved

Employment Type:  Draft

Employment Type:  Pending Approval

Training Location:

Training Start Date:

Termination Date:

3. On the search screen, the column “Last Training Approval Status” will display the current approval status for each learner:



Registration Info Training Session : 2019 - 2020 Trainee Status : All Trainee Type : All Registration Status : All Approval Status : Approved,New,Pending Approval

Trainee Search Result							Selected: 0 Total: 37
Search: <input type="text"/>							<input type="button" value="Print Documents"/> <input type="button" value="Export"/> <input type="button" value="Send Email"/> <input type="button" value="Run Task"/> <input type="button" value="View Profile"/>
<input type="checkbox"/>	Name	Student #	Last Training Start Date	Last Training End Date	Last Training Completion Status	Last Training Approval Status	
<input type="checkbox"/>	Alsalem, Hanan Najeeb A. E.	400248765	01-Jan-2020	30-Jun-2020	Completed Training	Approved	
<input type="checkbox"/>	Bartlett, Katelyn Marie	400220604	01-Jul-2019	26-Jun-2020	Continue Training	Pending Approval	
<input type="checkbox"/>	Bloomfield, Valerie	400103598	01-Jul-2019	30-Jun-2020	Continue Training	Approved	
<input type="checkbox"/>	Buwembo, Alice	400159695	01-Jul-2019	30-Jun-2020	Continue Training	New	
<input type="checkbox"/>	Carter Ramirez, Alison	001267103	01-Jul-2019	30-Jun-2020	Completed Training	New	
<input type="checkbox"/>	Clark, Kaylee Jordan	400045530	01-Jul-2019	30-Jun-2020	Continue Training	New	
<input type="checkbox"/>	Cockburn, Norah	001232251	01-Jul-2019	30-Jun-2020	Continue Training	New	

Each year, the Postgraduate Office will provide the deadline for learners to be promoted by. Due to this only occurring once per year, there will be annual training sessions as a refresher to ensure your learners are properly promoted.

### QUESTIONS?

If you have any questions or difficulties with this process, please contact MedSIS at [medsis@mcmaster.ca](mailto:medsis@mcmaster.ca)