FAQs

RESITRAK™

New content as of 6/6/07 is in boxes

How does ResiTrak work?

Please see the summary at http://www.mccreadiegroup.com/home/Default.aspx?tabid=56 for an overall description

Access to ResiTrak

When can I access ResiTrak?

ResiTrak is available twenty four hours a day, seven days a week. In the very rare event that the site needs to be down for maintenance, a notice will be placed on the login page.

Where do I need to be to access ResiTrak?

You can access ResiTrak anywhere that you can receive an internet connection.

General

What browsers are supported?

Internet Explorer 6/7

Mozilla Firefox 2 (Mac users: at this time Safari is not supported)

Do I have to download an application or program to run this service?

No. ResiTrak is a web-based program. That means that you can access ResiTrak from any computer and do not have to download anything.

How much does ResiTrak cost?

ResiTrak is a benefit provided by ASHP for accredited residency programs. There are no fees or other charges to the programs.

My connection timed out and I lost what I had done. How do I prevent this?

ResiTrak is designed to time out after 20 minutes of non-use. If you find you need to leave what you are doing, please be sure to hit a "save" button before you leave. If you are doing a setup wizard, click "next" until you get to the last page, and click "save". For many parts of ResiTrak, you do not need to complete the whole task at once. You can usually come back and finish it up later. Exceptions are tasks that are very short.

What are tasks?

Tasks are individual assignments, such as evaluations, that have been assigned to a user to complete. There is a due date associated with each task. An e-mail will be generated automatically and sent to the user to inform him/her that a task is due. To complete a task, a user may click the link in the automatically generated e-mail message or click on the task on the home page.

Password

I received a welcome email and password. Should I let others [Preceptors, RPD, and Directors] use it?

No. Each user that is added to your site within ResiTrak will receive a welcome email which will include a unique password for their login.

I forgot my password. What should I do?

Go to the ResiTrak homepage (http://resitrak.mccreadiegroup.com), click on the "Forgot Password" link and follow the instructions. Your new password will be e-mailed to you.

I deleted/misplaced/never received the e-mail message containing my password. What should I do?

When you're at the ResiTrak homepage (resitrak.mccreadiegroup.com), click on the "Forgot Password" link and follow the instructions. Your new password will be e-mailed to you. If you do not receive the e-mail containing your password from the "forgot password" routine, there may be an issue with spam filters. Please contact us or your IT support desk for assistance.

When I put in my password, ResiTrak won't accept it. What am I doing wrong?

First, make sure that the e-mail address you are using is the one listed in your welcome e-mail. This is your login ID for ResiTrak. Second, make sure you don't have caps lock on. If you are typing in a password from an automated e-mail message, try to copy and paste it into ResiTrak instead of typing it one character at a time. If you continue to have problems, either click on the "Forgot Password" link to create a new password or contact support.

How do I change my password to something I can remember?

In the "My Account" menu, select "Change Password". You will be prompted to enter your old password, and then your new password two times.

Can you tell me what my password is?

No. We cannot access your password due to the security features of ResiTrak. You will need to go through "forgot password" if you forget it (see above).

ResiTrak setup

How long does it take to setup ResiTrak?

There are 3 parts to setting up ResiTrak for use at your site. All of these parts are saved year to year and only need to be done once unless changes are needed.

1. Site Setup – typically done by the director of pharmacy or designee. This generally takes 5 minutes or less to confirm ASHP's information. After this process is completed, the RPDs are automatically notified to set up their residencies.

2. Residency Setup – done by the RPD. This setup generally takes 5-30 minutes if you have all the information you need readily available. However, it may take longer if you have a large number of preceptors in your program. During this step, the RPD will set some defaults for length and start date, add an optional description, select the evaluation scales to use for the residency, select the outcomes, goals and objectives for the residency (including custom), and add/select the preceptors for the residency. After the RPD saves this information, the preceptors are automatically notified to set up their learning experiences.

3. Learning Experience Setup – done by the preceptor or the RPD. This setup generally takes 5-30 minutes for each learning experience if you have all the information you need readily available. During this setup step, the learning experience name, description, type (e.g. rotation, longitudinal), and preceptors are set. You will also select from the residency goals that will be taught or taught and evaluated in the learning experience. Finally, you will define the default evaluation schedule for the learning experience. As residents are enrolled in the learning experience, these scheduled evaluations will be triggered automatically per the schedule defined in the learning experience setup.

During all the setup steps, be sure to click the "Save" button on the last screen to save what you have done. You can go back at any time to edit these setup steps using the menus on the home screen.

That's it for setup. You're now ready to enroll residents, schedule them for learning experiences and do their evaluations on-line.

If I need to make changes, can I do setup again?

Yes! You can go through the setup wizards as many times as you want. Just click on the appropriate setup link and fill in the necessary changes. Remember to go completely through to the end of the wizard and click the "save" button each time.

Users

How do I change *my* email or other contact information?

Go to "My Account," click on "Edit my user info."

How do I change *someone else's* email or other contact information?

If you are an RPD or have site setup privileges, you can change contact information for other users. To do this, select "user manager" from the RPD or site setup menu. Find the user you wish to edit, and click the word "edit" next to their name.

If you are not an RPD nor have site setup privileges, you will not see the RPD nor site setup menus. In this case, we suggest asking the user him/herself to make the change, or ask an RPD to do it.

What are roles? What do you mean by site setup privileges? What is a Residency Administrator?

Roles are the way ResiTrak defines what each individual person is allowed to do in ResiTrak. There are many roles with differing privileges:

Site setup: Users with site setup privileges are like "*super-users*". They can do just about anything.

RPD (Residency Program Director): This user should be the individual identified as the RPD to ASHP. The RPD is able to setup the residency program and assign preceptors. Only one RPD is allowed for each residency program. RPDs should also generally be selected as preceptors in the residency setup wizard.

RA (Residency Administrator) or Residency Coordinator: This user has *read-only* access to view what has been completed, and what is scheduled to be done, in a residency program. Sometimes this may be an official position at an institution. Other times it may make sense to give this role to a departmental secretary or administrator. An individual assigned only as an RA cannot complete evaluations or make any changes to the site, residency program, or learning experiences. One residency administrator/residency coordinator is allowed for each residency program.

Preceptor: A preceptor is in charge of a learning experience. This is a relatively limited role. The preceptor may change his/her learning experience(s). Preceptors also complete evaluations associated with their learning experience(s).

Each user can have multiple roles. For example, some sites want to have two people who can make substantial changes to residency programs. One of these people may already be the RPD; the other could be given site setup privileges.

Most changes to roles should be made in the residency program setup wizard (accessible to site setup users and RPDs) or the site setup wizard (accessible only to those with site setup privileges).

How do I add a user?

The easiest way to add a user is to go to the residency program setup wizard for the specific program you want to add them into. Be sure to complete the entire residency program setup wizard and click "save" at the end. It is also possible to add a user in the user manager (in the site setup and RPD menus).

How many users can I add to each role?

Site setup privileges (which allows you to do almost anything) can be assigned to as many users as needed. However, we recommend that this be limited to those who need this level of access, since so much can be done with site setup privileges.

There is one RPD and one Residency Coordinator/Administrator for each residency program. You may add as many preceptors as you want for a residency program. You may have multiple preceptors for each learning experience. The number of residents in each residency program is not limited.

The chief of pharmacy is generally added initially to do the first site setup. Other roles may be added to this individual as appropriate.

How do I find out what roles an individual user has? Is he/she a preceptor? An RPD? Can this person do site setup?

If you are a site setup user or an RPD, go to the user manager from the site setup or RPD menu. The roles each person is assigned are listed below their name. Some changes can be made in the user manager screen. You will know which ones can be made from this screen by the links (such as "edit" or "remove" next to specific items on the screen. Other changes are made in the setup wizards (e.g. site setup, residency program setup, or learning experience setup).

Who is(are) the current site setup user(s) at my site?

Please contact ResiTrak support and we will let you know. If you are an RPD or a site setup user, you will also find this information in the user manager in the site setup or RPD menus.

How do I remove someone from site setup?

A user with site setup privileges needs to do this. Go to the "Site Setup" wizard in the "Site Setup" menu. Click "next" on the first screen to get to the screen that says "Site Setup Users". The users whose names are highlighted are the ones who have site setup privileges. To remove one user from site setup, hold down the ctrl key and click the correct name. This user's name should no longer be highlighted. Be sure to click through the rest of site setup and click on "save" on the last page to save all your changes.

ResiTrak will not allow you to delete all site setup users. You must select at least one individual to have site setup privileges at your site.

How do I remove someone from being an RPD or Residency Administrator/Coordinator?

Please note that you must have a name in both the RPD and the Residency Administrator/Coordinator position for all programs. You may select the same person for both. There are two places you can change the users with these roles:

Site setup: Select “Site Setup” from the “Site Setup” menu. Click “next” two times to get to the RPDs and Residency Administrators page. Select the appropriate users for the RPD(s) and Residency Administrator/Coordinator(s). Neither of these may be left blank. If you do not want to add a Residency Administrator/Coordinator, put the same name in both the RPD and Residency Administrator/Coordinator. Be sure to click through the rest of site setup and click on “save” on the last page to save all your changes.

RPD: From the RPD menu, select “Residency Program Setup.” Select the correct residency program, then click “next”. The next screen will allow you to select users for both RPD and Residency Administrator/Coordinator. Select the appropriate users. Neither of these may be left blank. If you do not want to add a Residency Administrator/Coordinator, put the same name in both the RPD and Residency Administrator/Coordinator. Be sure to click through the rest of site setup and click on “save” on the last page to save all your changes.

How do I remove a preceptor?

First, remove the preceptor from all learning experiences that he/she is associated with. Go to the learning experience setup wizard in the preceptor menu, and reassign all learning experiences to another preceptor. (Be sure to click through to the end of the wizard to click “save”.) You may need to remove the preceptor from more than one learning experience.

After removing the preceptor from his/her learning experiences, you will be able to remove the user from the program. Go to the “Site Setup” or “RPD” menu and click on the “User Manager”. Here you will see a list of all of the users at your site. Find the preceptor’s name and click on the remove link next to the Preceptor role. If the remove link is not there, it means there are additional learning experiences currently associated with the preceptor. The user manager will tell you which ones they are so you can reassign those learning experiences.

A feature that allows the RPD to delete learning experiences will be provided in the future. This will allow you to delete the learning experience instead of reassigning it to another preceptor.

How do I remove a user completely?

The best first step is to go to the User Manager (in either the Site Setup or RPD menus) to determine what roles the user has. You will need to remove all of these roles before you remove the user.

Follow instructions above to remove the user from all his/her roles as site setup, RPD, Residency Administrator/Coordinator, and preceptor. After removing all roles, return to the user manager. If the "remove" link still shows up next to one or more preceptor role(s), click remove. When all roles have been removed, a "remove" link will show up to the left of the user's name. Click this "remove" link.

Residents should be "removed" by going through the close-out process (scheduled to be complete fall, 2007). Residents that you have put in to experiment with ResiTrak can remain indefinitely if you choose.

Note that no user is truly removed. They are only inactivated. If you wish to add a former user back to your site, go to any place in ResiTrak where you can add a user and click "add". After typing in the correct e-mail address, the user information will fill in automatically.

I am an RPD/preceptor at multiple sites. How does that work?

If you are following a link from an e-mail message, you will be automatically directed to the correct site when logging in. If you are logging in without following a link, you will be asked to select which site you want to use after typing in a correct login ID and password.

I want to add a user who already has an account through another site. How do I do it?

Go to any location in ResiTrak where you want to add the user. For example, to add a preceptor, go to the end of the residency setup wizard where the preceptor list is shown, and click "add". Type in the e-mail address that the user has used for his/her original site. If a user already has an account associated with the e-mail address you type in, their user information will automatically show up in the user contact information screen. When you click save, they will be added to your site. They will now be able to complete their tasks at both sites.

Residency Program

How do I add a new preceptor to a Residency Program?

Under the RPD menu, click "Residency Setup." Towards the end there will be a preceptor's page. Click "New" at the bottom of the page and add the appropriate contact information. Click "save" to add the user. You will be returned to the screen showing the list of potential preceptors; make sure that the new user is checked. Click "save" to save all information entered in the residency setup wizard.

I have a residency program that has one ASHP residency code, but two NMS codes. The residency programs vary between the two NMS codes. How do I create two separate programs with one ASHP residency code?

ResiTrak does not differentiate programs by NMS code at this time. However, ResiTrak allows significant customization of the program for each individual resident through the customized training plan. You will want to use this flexibility to differentiate programs that vary by NMS codes.

When selecting outcomes, goals, and objectives for your residency program, select all of them that will be used for one or more NMS codes. While completing the first customized training plan for each resident, carefully deselect the outcomes/goals/objectives that do not apply to that particular resident. If there are different typical start dates, length of program, etc., you will also be able to customize these for the particular resident. Select the correct information for one of the NMS codes when setting up the residency program, and modify as appropriate when residents are enrolled.

How do I revise or delete custom outcomes, goals, or objectives?

Please send instructions to ResiTrak support and we will do it for you. Note that custom outcomes, goals, and objectives do not need to be selected for the program, learning experiences, or residents, and so leaving unused custom items in this section should not be problematic.

Learning Experiences

How do I create a new learning experience?

Choose the "Learning Experience Setup" link from the Preceptor menu. From the drop-down menu, select "New" to create a completely new learning experience, or "New from existing" to create a new learning experience based on an existing learning experience (settings will be pre-set based on the selected existing learning experience.). Follow the learning experience setup wizard through to the end, completing or editing the information shown, and click "save".

How do I delete a learning experience?

Currently, there is no feature in ResiTrak that will allow you to delete a learning experience. Here are two options:

1) If you need to add a learning experience, over-write by editing the learning experience you want to delete. Go to learning experience setup, select the learning experience to remove, and rename it to the new one. Continue through the learning experience setup wizard as if you were editing a learning experience.

2) Rename the learning experience to something like "Duplicate" or "Do not choose me". This will remind the RPD to not select it when adding learning experiences to a resident's schedule. When the "delete learning experience" feature is added, you will be able to delete these learning experiences.

How do I handle multiple preceptors for one learning experience?

It depends on how whether the preceptors work together to precept one resident, or if each preceptor is responsible for a different resident at any one time.

If the preceptors work together to mentor each resident, one learning experience should be created which includes all preceptors. In this case, all preceptors will be contacted to complete the evaluation for each resident who is assigned to the learning experience. The first preceptor to push the button to complete the evaluation will be considered the preceptor who completed it. Example: Preceptor A and Preceptor B have a great working relationship and like to work together to educate residents. Preceptor A and Preceptor B develop a learning experience where, together, they are assigned two residents for a month-long learning experience. Since both Preceptors share responsibilities for both residents, they both should have input on the evaluation for both residents. They will create one learning experience in ResiTrak, and will both receive e-mail notification when evaluations are due for each of the residents. They will coordinate who will fill out each evaluation.

If the preceptors do not share responsibilities for single residents, a separate learning experience should be created for each preceptor. We recommend putting the preceptor's name in the title of the learning experience to differentiate them. To create all these learning experiences, you will first want to create one learning experience for one preceptor. Make sure all aspects of this learning experience are completed accurately and completely. Then, go through the setup wizard again, selecting "new, based on an existing learning experience." Select the learning experience already completed for one preceptor as the learning experience to copy. Continue through to the end of the learning experience wizard, adding the new title and new preceptor, and making any required changes. Be sure to click "save" at the end of the wizard. Repeat the process of creating new learning experiences based on an existing one until you have one learning experience for each preceptor. Example: A residency program has 6 preceptors that do internal medicine learning experiences. The goals and objectives are similar for each preceptor. Each preceptor has one or two residents at a time, but does not share the responsibilities for any one resident during a specific learning experience. A separate learning experience is created for each preceptor. Each preceptor receives only the evaluations for his/her residents, not those for all residents in internal medicine learning experiences.

Residents

How do I enroll a resident?

Under the RPD menu, click "Enroll Resident," and follow the screens. The resident being enrolled will receive an e-mail welcoming them to ResiTrak and any incoming entering interests forms you've assigned to them (Note: entering interests not available until the 2008-2009 residency year). It's OK if the incoming resident uses a school e-mail or other private e-mail address. Their e-mail address can be changed in ResiTrak to your health system e-mail when they arrive on site.

How do I add a learning experience to a resident's schedule?

Under the RPD menu, click "Resident Schedule." About half-way down the page, you will see two links. One link adds a learning experience, and the other one adds a non-learning experience schedule item.

Click on “Add learning experience” and fill in the necessary information. You must add learning experiences to the resident’s schedule to do evaluations in ResiTrak.

How do I remove a learning experience from a resident’s schedule?

Under the RPD menu, click “Resident Schedule.” To the left of the learning experience start date, there should be a link titled “Remove.” Click that link to remove the Resident from that learning experience. You can add and remove as many times as you want.

My resident came in to the program with a lot of experience, and has already achieved one of the objectives. How do I delete it from his required list?

The customized training plan feature will allow you to mark objectives as achieved OR deselect them. Required objectives can only be marked achieved – they cannot be deselected. You may deselect elective objectives if you prefer.

To mark objectives as achieved or select/deselect them, go to the “Customized Training Plan” in the RPD menu. Click on the appropriate link, and follow the instructions. When you return to the Customized Training Plan page, be sure to click “save” at the bottom to save your comments, including the comments automatically added by ResiTrak.

Can I specify days of the week for a longitudinal learning experience?
Not currently. Depending on the details of the learning experience, you may consider putting the day of the week in the title of the learning experience.

What files can I upload to the file manager?
(.doc .docx .xls .xlsx .ppt .pptx .pdf .zip)
Microsoft Word, Microsoft Excel, Microsoft Powerpoint, Adobe PDF, and zip files are supported. Currently, there is a maximum file size of 2MB per file, and a maximum of 10 MB per resident per residency year. If you have a filetype that is not supported, we recommend converting it to a zip file. You may also need to zip very large files.

How do I remove a resident?

Residents should be “removed” by going through the close-out process (scheduled to be complete fall, 2007). Residents that you have put in to experiment with ResiTrak can remain indefinitely if you choose.

Evaluations

How do evaluations work? (will be functional before July 1)

There are two ways to initiate an evaluation: schedule it as part of a learning experience or select an on-demand evaluation.

1. Schedule an evaluation: During learning experience setup, the evaluation schedule is set for that specific learning experience. As residents go through the learning experience and an evaluation becomes due, each person who is responsible for completing the evaluation will receive a task to complete the evaluation. For a snapshot or summative evaluation, the preceptor will receive a task to complete the evaluation, and the resident will also receive a task to complete the same evaluation as a self-evaluation. For a learning experience/preceptor evaluation, only the resident will receive the task to complete the evaluation. For custom evaluations, the appropriate individuals will receive tasks.

2. On-demand evaluation: At any time, a preceptor may select to do an on-demand evaluation. When the preceptor selects the evaluation, he/she will be directed to the screens where he/she can complete the evaluation. For snapshots and summative evaluations, the resident will also receive a task to complete a self-evaluation.

After the evaluations are completed, they will be routed to the resident, preceptor, and RPD. Tasks will be generated to route it in the proper order. The users will receive e-mail messages and tasks on their home page directing them to review and sign the evaluations. The self-evaluations, preceptor-completed evaluations, and the learning experience/preceptor evaluations will all be routed in this way.

Will objectives/goals that the resident has already achieved show up on subsequent evaluations?

In short, yes. In summative evaluations, there is a box called "ACHR" or "achieved for residency". If a preceptor checks this box in a summative evaluation, ResiTrak will keep track of the fact that the resident has achieved that objective. After a resident has achieved the objective, subsequent evaluations will have this box checked automatically for that particular objective. The evaluator has the option of removing that check to say he/she believes the resident has not achieved that objective. If it is left checked, the preceptor can choose to score the objective, or select not applicable.

In addition, the RPD can mark an objective achieved or not achieved when doing a customized training plan or customized training plan update.

I have a specific evaluation form/questions that we like. Can you put it into ResiTrak?

ResiTrak will have a feature called Custom Evaluations. With this feature, you can build your own evaluations for your program(s). Custom Evaluations will allow you to define your own questions and answer types and can be scheduled or called on-demand. Custom evaluations will be available by July 1.

Other

What new features are planned for ResiTrak?

In fall, 2007, a number of features will be complete. The end-of-year closeout process for residents will be added to ResiTrak. A feature to track residents after they have completed their residency will be incorporated. A number of forms will be added which can be sent to the resident when they are enrolled (sometimes called “entering interests” forms).

We have had a number of requests for specific reports and other features. If you have recommendations, please let us know.

I have a question not included in your FAQ list.

Please send us e-mail (support@mccreadiegroup.com) or contact us by phone (866-722-1096).

I read the FAQs, but I don’t really understand what to do.

Please contact us by phone (866-722-1096). We are happy to walk you through what you are trying to do.

MCCREADIE GROUP