ACGME Schedule Tracking
User's Guide
Modified July 2015

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ACGME Schedule Tracking Spreadsheet

In order to comply with Medicare reporting requirements, an ACGME Schedule Tracking workbook will be generated in Excel version 2003 each month by the Registrar's Office, reflecting appointment information for fellows and house staff in ACGME approved programs for that month. This workbook will be emailed to the appropriate program contact person for completion.

Over the past few years, the university has quickly moved from Office 2003, to 2007, and now to 2013. At this time, the ACGME workbook will continue to be created as an Excel 2003 version, which is compatible in Excel versions 2003 through 2013.

Registrar's Office Contact

Completed workbooks should be returned via email to the Registrar's Office no later than 10 business days after the end of a month. Contact Information for ACGME:

> ACGMETracking@jhmi.edu
> (phone) 443-287-0267
> (fax) 410-955-0826

Once a completed workbook is returned to the Registrar's Office, changes can no longer be made by the department to the workbook. Changes should be submitted in the form of a letter signed/dated by the training program director and emailed to ACGMETracking@jhmi.edu for processing.

In addition, backup documentation should be submitted to the Registrar's Office along with the workbook. Backup documentation must include block rotation schedules signed by the program director and any call schedules that can be used to further refine the block rotation schedule. This backup documentation must be submitted via email as a pdf document and must be signed by the program director. Documentation must also contain a key written so that a layperson can read it and understand it if abbreviations and/or mnemonics are used.

Departments are also required to keep supporting documentation in their files for a period of seven years.

Departments should keep appointment data up-to-date so that the spreadsheets accurately reflect appointment status each month.

Macro Security in Excel

The ACGME Schedule Tracking workbook contains macros that are critical to its operation. Opening the workbook when macros are not enabled will cause errors in the spreadsheet. The following sections explain how to ensure macros are enabled.
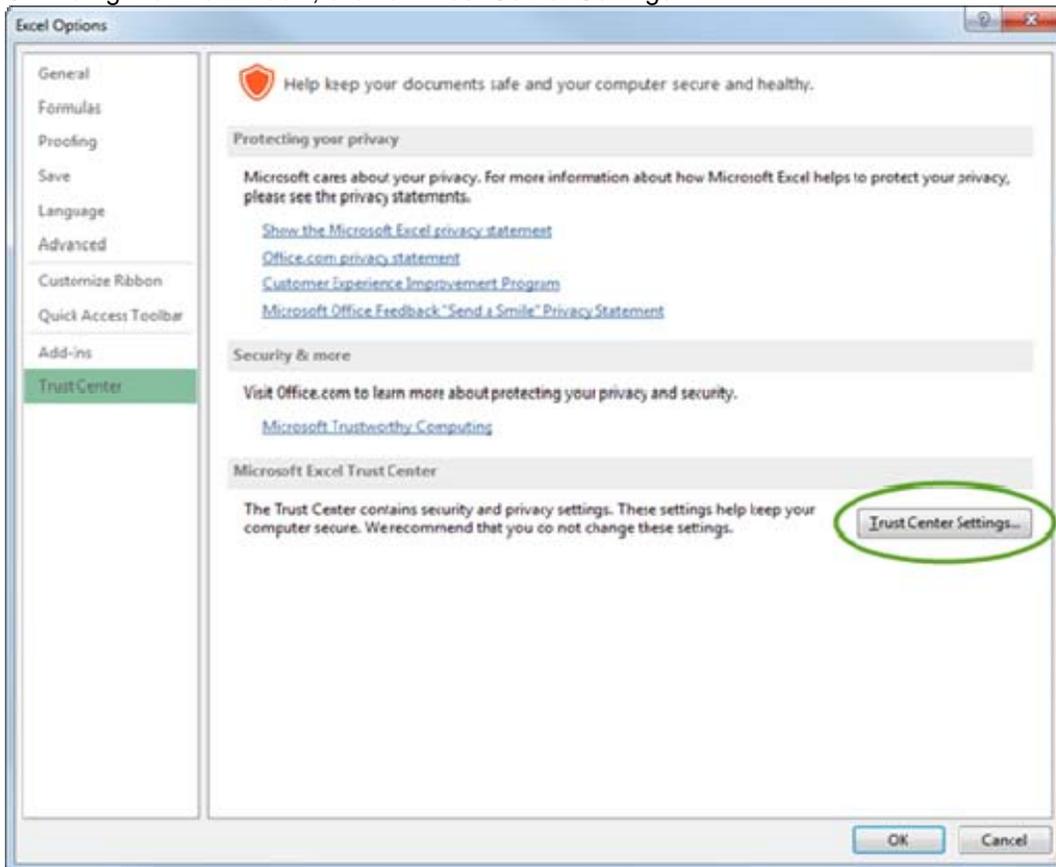
Setting a Trusted Location in Excel 2013

1. Open Excel 2013 via the Start/Programs menu or a shortcut on your desktop. Do not open a spreadsheet.
2. Click on the File tab.

3. Click on Options. A window labeled 'Excel Options' will open.
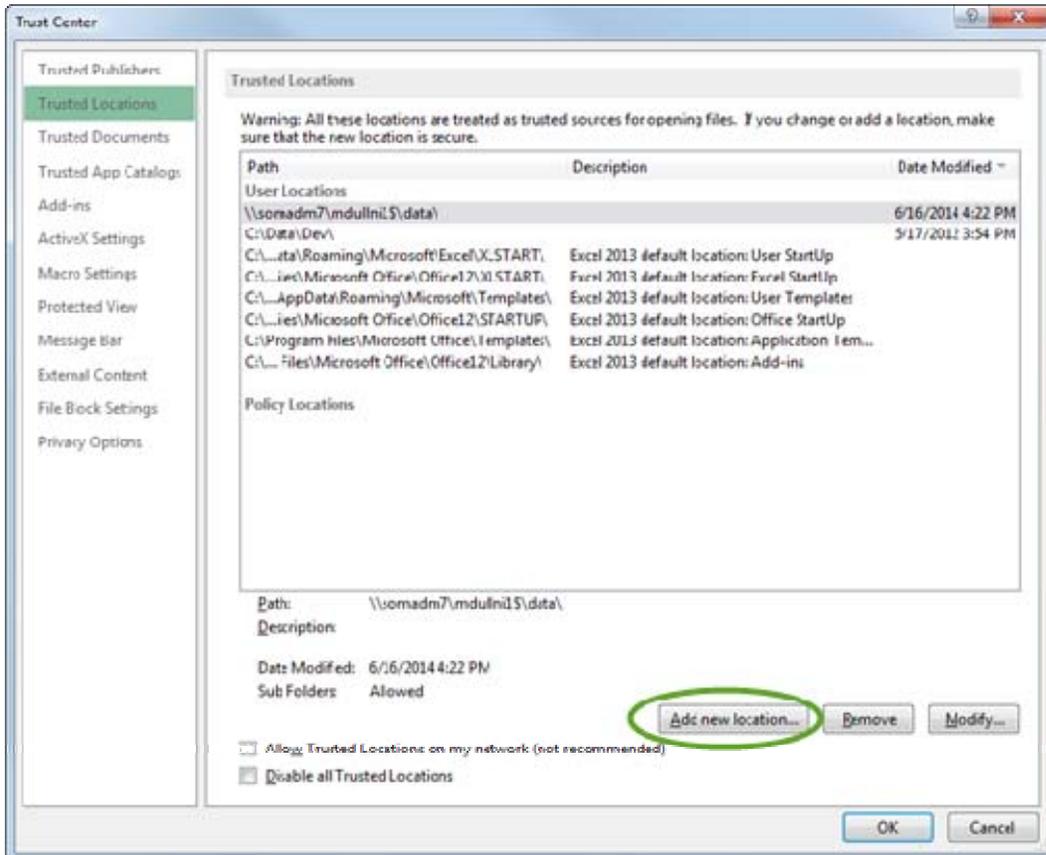

4. Click on Trust Center.
5. On the right of the window, click on Trust Center Settings.

6. Click on Trusted locations.

7. Click on Add new location…

8. Browse to the folder that you want to trust and select it; click OK.
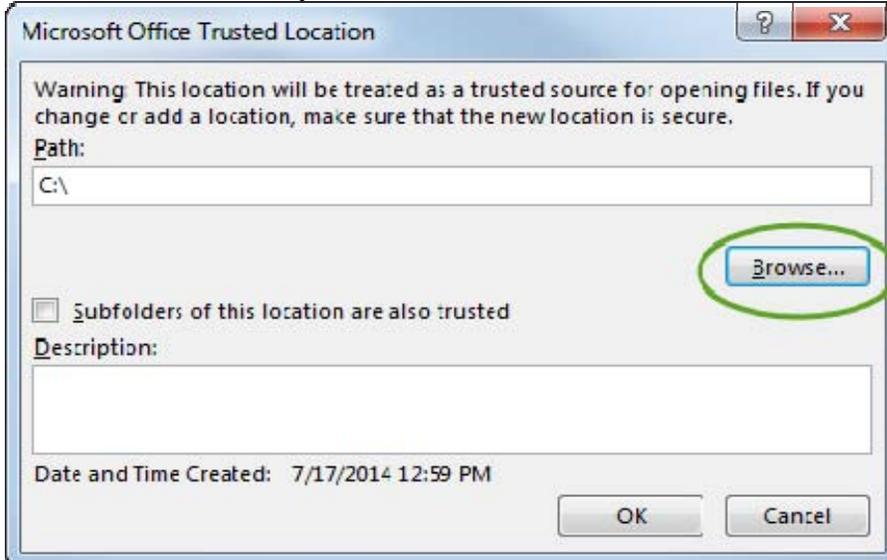
9. Click OK to add the location.
10. Ensure the folder is in the list of trusted locations.
11. Exit Excel Options by continuing to click ok until the windows are closed.
12. Exit Excel.

Changing Macro Security in Excel 2007

1. Open Excel 2007 via the Start/Programs menu or a shortcut on your desktop. Do not open a spreadsheet.
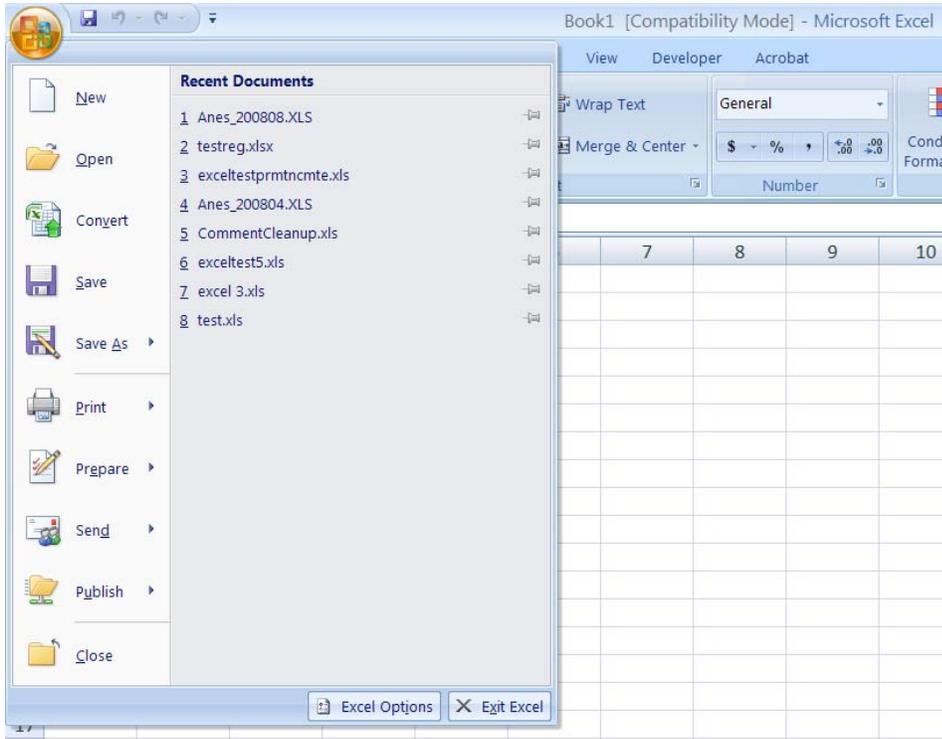
2. Click on the Office Button in the left-hand corner.
3. On the dropdown menu, click on Excel Options.
4. On the next menu, click on trust Center.
5. Click on Trust Center Settings on the lower right.
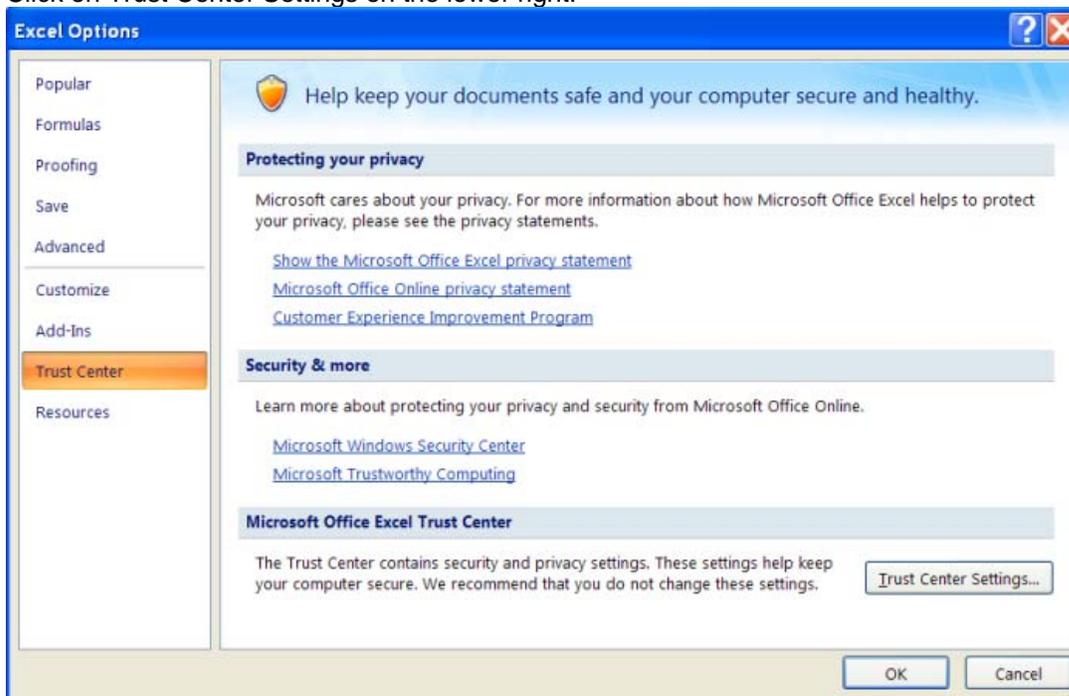
6. On the next menu, click on Macro Settings.

7. Make note of the selected security setting.
8. Change the security setting to Enable all macros
9. Click OK on each menu to close them.
10. Exit Excel 2007.
11. Remember to follow these instructions to restore the original security settings each time you have finished with the ACGME spreadsheet.
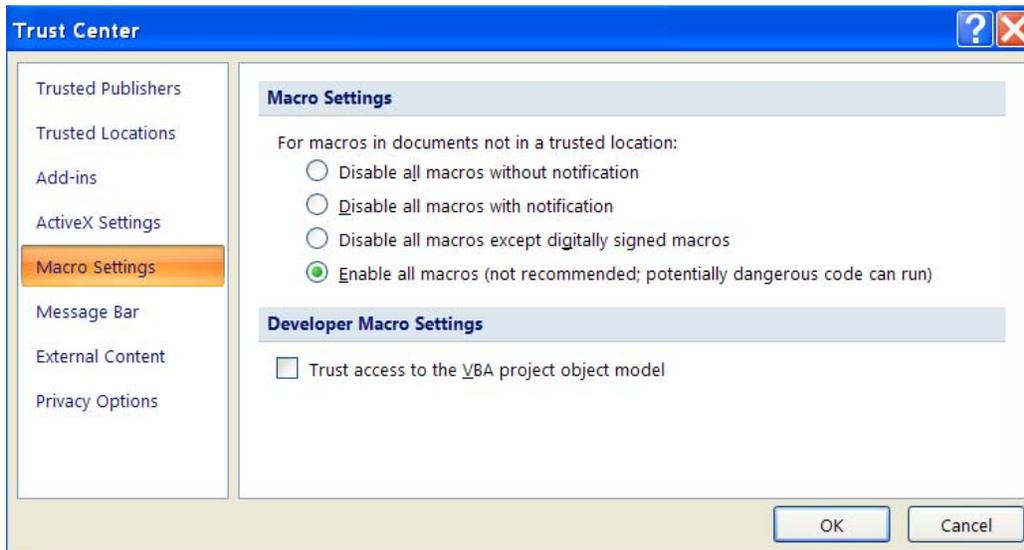
How to Use the Excel Workbook

Instructions on how to use the spreadsheet (i.e. fields to complete, etc) are included in the spreadsheet on the tab labeled 'Instructions' and here for your reference.

Data Entry Instructions	
YYYMM Worksheet	The first worksheet lists the fellows that had an active appointment for part or all of the month specified by the worksheet name (YYYYMM). The days of the month are represented on the top row. Next to each fellow's name under each day are three selection boxes: Location, Activity, and % of Day. You must select a value from the dropdown lists for these data fields for each day of the month on which the fellow's appointment is active.
Addendum Worksheet	This worksheet allows additional personnel to be entered who do not appear on the first worksheet. Functionality is similar to the first worksheet, except you must fill in the last and first name.
Location:	Select one of the listed locations or select 'Other-Hospital'. Selecting Other-Hospital will bring up a message box where you must type in the location name. If you do not enter the name, the box will not close therefore preventing you from continuing. After the name is entered, it will be stored with the day of month in the 'Other-Hospital Locations' column for that fellow. Each subsequent 'Other-Hospital' entry will be appended to this column, except if AutoFill is used. It will be assumed that if subsequent locations are 'Other-Hospital', then the location is the one specified for the first day of the date range.
Activity:	Select an activity. Please consult the user's guide to determine which value to pick.
% of Day:	Select the percentage of the day spent on the activity. See the user's guide to determine which value to pick.

Auto-Fill To End of Month:	Clicking on the Auto-Fill button will prompt you to choose between (1) filling the rest of the month for the selected fellow with the same data from the day selected, or (2) fill every day for every fellow with the same data from the day and fellow selected. Selecting to (1) fill the rest of the month for the individual fellow will enter the same location, activity, and percent of day data for a fellow in the days that follow the day where the cursor is placed. The cursor should be placed in the location, activity or % of day cell for the beginning day of the date range where all the data is the same before clicking the auto-fill button. Selecting to (2) fill every day of every fellow with the same data as in the selected day will enter data into every field for every fellow in the spreadsheet. If the data is not the same through the end of the month, go to the first day where it changes and continue manual entry. Auto-Fill will not populate days that are not included in a fellow's appointment dates range.
	Auto-Fill will write over any existing data in cells that fall into the range specified by your choice above. If you do not want this data overwritten, then do not use Auto-Fill.
Comments:	Use the comments field for each fellow to relay any additional information.
Completed By (Email):	This value will default to the email address we have on record as the program administrator. If the email does not belong to the person who has completed the spreadsheet, then change this value to the correct email address.
Date Completed:	This value is updated whenever the spreadsheet is saved.
Exiting Spreadsheet:	All data cells must be completed before returning spreadsheet to the Registrar's Office. When the spreadsheet is closed with empty data cells, a prompt will appear that warns about empty data cells and asks if you want to continue to close the spreadsheet. Answer yes to close the spreadsheet without first returning to complete empty data cells. Answer no to return to the spreadsheet to complete the data.

Locked Fields

Data entry will be recorded by person by day based on a person's appointment. If a person does not hold an appointment for a day, that day is grayed out on the spreadsheet and data cannot be entered into it.

You cannot change a person's name on the spreadsheet. Name changes can be submitted via a 'Request for Change in Non-Faculty School of Medicine Appointments' form, aka pink sheet. Your department's appointment coordinator can assist you with preparing this form for submission.

Data Entry

Overview

Select a location, activity and percentage of day for each person for each day of the month that is open for data entry. Do not leave any blank data values or else the spreadsheet will be returned for correction. The default value for the percentage of day defaults to 100% for each day but can be changed as appropriate.

Be sure that the data entered on the spreadsheet is consistent with the data presented on the block rotation schedule and/or call schedule, as applicable.

Saving the Workbook

The workbook will save automatically each time that you close it. If there are any blank values, you will be prompted to verify you want to close the incomplete spreadsheet; but you will not have an option to close the spreadsheet without saving it.

Reporting Scenarios

To assist in the data entry, a few scenarios are presented here as examples of data entry.

Scenario 1
Fellow in an approved ACGME program at JHH provides patient care for more than ½ of his/her shift at JHH:
Location = JHH
Activity = Patient Care
% of Day = 100%

Scenario 2
Fellow in an approved ACGME program at JHH scheduled for the entire month at JHH in patient care has regularly scheduled days off:
Location = JHH
Activity = patient care
% of Day = 100%

Scenario 3
Fellow in an approved ACGME program at JHH is scheduled to work off-site at a non-hospital location (such as a doctor's office) in which there is a formal written agreement in place prior to the work being performed offsite and that agreement indicates that JHH will be responsible for payment of fellow:
Location = Select the exact name of the location, if available, from the pick list or else select 'non-hospital pd by JHH'
Activity = patient care
% of Day = 100%
Comments = If the location name was not included in the pick list, put the location name in the comments field

Scenario 4
Fellow in an approved ACGME program at JHH is scheduled to work off-site at a non-hospital location (such as a doctor's office) in which there is no formal written agreement in place prior to the work being performed offsite or where the non-hospital location is paying for the services of the fellow:
Location = non-hospital not pd by JHH
Activity = patient care
% of Day = 100%
Comments = Indicate the name of the location so that a written agreement can be executed. The absence of a written agreement will disallow JHH from being able to count that resident's activities at the non-hospital location.

Scenario 5
Fellow in an approved ACGME program at JHH is scheduled to work ½ day at JHOC and ½ day at Johns Hopkins Bayview:
Location = JHH 50%/JHBMC 50%
Activity = patient care
% of Day = 100%

Scenario 6
Fellow in an approved ACGME program at JHH is scheduled to work in a foreign country providing patient care:
Location = Foreign
Activity = patient care
% of Day = 100%

Scenario 7
Fellow in an approved ACGME program at JHH attends a day-long conference either at JHH or another location and has no patient care activity:
Location = JHH
Activity = Non-patient care
% of Day = 100%

Scenario 8
Fellow in an approved ACGME program at JHH is scheduled to do research as an ACGME program requirement:
Location = JHH
Activity = Research-ACGME
% of Day = 100%

Scenario 9
Fellow in an approved ACGME program at JHH is doing research but it is not required as part of his/her program as required by the ACGME (i.e. fellow doing additional year(s)):
Location = JHH or Other *
Activity = Research nonACGME
% of Day = 100%
* If other is selected, user will be prompted to enter the name of the location

Scenario 10
Fellow in an approved ACGME program at JHH has spent a full day in research related to a specific patient:
Location = JHH
Activity = Research-Specific Patient
% of Day = 100%

Scenario 11
Fellow in an approved ACGME program at JHH scheduled for the entire month at JHH is off for a sick day:
Location = JHH
Activity = patient care
% of Day = 100%
Note: adhoc changes do not need to be recorded for Medicare purposes – follow original rotation schedule for reporting purposes

Scenario 12
Fellow in an approved ACGME program at JHH is on a scheduled vacation:
Location = JHH
Activity = Time Off
% of Day = 100%

Scenario 13
Fellow in an approved ACGME program at JHH is on an extended sick leave or is on maternity leave (i.e. fellow's program length is extended by length of absence):
Location = JHH
Activity = Leave of Absence
% of Day = 100%

Scenario 14
Fellow in an approved ACGME program at JHH works at a JHH offsite location (i.e. Odenton, Greenspring, White Marsh):
Location = non-hospital pd by JHH
Activity = Patient Care
% of Day = 100%

Scenario 15
Fellow in an approved ACGME program at JHH is in the clinic in the morning and doing ACGME research and attending a divisional conference in the afternoon:
Location = JHH
Activity = Patient Care
% of Day = 50%

Scenario 16
Fellow in an approved ACGME program is a floater (assigned to handle calls from home for both JHH and Bayview patients):
Location = 50% JHH/50% Bayview
Activity = Patient Care
% of Day = 50%

Scenario 17
Fellow in an approved ACGME program spends a ½ day in clinic at a non-hospital location paid by JHH and a ½ day at JH Bayview Medical Center:
Location = 50% JHH/50% JHBMC
Activity = Patient Care
% of Day = 100%

Scenario 18
Fellow in the Pathology program is engaged in clinical research at JHH:
Location = JHH
Activity = Patient Care
% of Day = 100%

Scenario 19
Fellow working in a hospital that is not an option on the 'locations' list and fellow is providing patient care:
Location = Other-Hospital
Activity = Patient Care
% of Day = 100%
Comments = Indicate name of the Hospital

People Not Listed on the Spreadsheet

There are two possible reasons that a person may not be listed on the spreadsheet:
1. The appointment record submitted to the Registrar's Office is incomplete or nonexistent.
2. There is a rotator from an ACGME approved program that is not recorded in the Registrar's Office system as in an ACGME approved program.
   a. Note: Only include a rotator if he/she is rotating from and to an ACGME approved program.

In either case, you will need to add the person to the Addendum sheet in the Excel workbook. Be sure to include all information requested, and in the case where no appointment was submitted to the Registrar's Office, follow-up immediately by sending the appropriate credentialing paperwork for processing.

Location = Other

'Other' location was removed from the spreadsheets as of 2/2012.

Supporting Documentation Required

As of July 1, 2014, all supporting documentation should be submitted as a single pdf document and sent via email along with the monthly tracking spreadsheet. The documentation should be named the same as the spreadsheet (i.e. Anes_201407.pdf).

Supporting documentation must be submitted each month to the Registrar's Office along with the ACGME tracking spreadsheet. This documentation must be maintained for at least seven years in the program's departmental files as well as by the Registrar's Office.

Be sure that written documentation mirrors the data submitted in the ACGME tracking spreadsheet and includes ALL of the following elements:
1. Name of program (use the mnemonic that is generated with your spreadsheet!)
2. Month/year for which the documentation is being submitted
3. Name of each fellow/resident in the program as well as rotators from other ACGME training programs
4. Description of daily activity and location for each fellow/resident and rotator

    Include a key to all abbreviations used in the documentation; this key should be written so that outside auditors can interpret your program data
    a. Note: A key is required each July if not provided each month as part of the documentation
    b. Examples of items to include on the key:
        i. If documentation includes initials for fellows/residents – key should include full name associated with initials
        ii. If documentation includes rotations in 'Hopkins lingo' – such as: Blalock Blue – key should include the location of the service (i.e. JHH in this case)
5. Signature of training program director verifying the accuracy of the schedule.
6. Date of training program director's signature.

    You may not submit documentation in advance of the month that is being reported.