

## Institutional Coordinator Timeline

This timeline outlines the responsibilities of an institutional coordinator\* and provides an introduction to the position for those new to graduate medical education (GME). It contains a general summary of the types of tasks, events, and deadlines in a typical academic year, and aims to help new coordinators organize and prioritize their daily, weekly, and monthly projects.

Be aware of the varied nature of the institutional coordinator position. Not all items included in the timeline will be applicable to all Sponsoring Institutions. The exact dates and frequencies of tasks may vary significantly by Sponsoring Institution, and Sponsoring Institutions may use different terminology for the same processes. This is a general overview and a tool to customize to an individual Sponsoring Institution's needs.

Guidance on vacation time is not included here, but note that the start of the academic year (June and July) is the busiest time of year for institutional coordinators.

\*The term institutional coordinator (or coordinator) is used throughout this document, although institutions may use different terminology, such as institutional administrator.

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- [Contacts](#): This section provides a table to record the names and contact information of colleagues with whom coordinators interact on a regular basis.
- [Important Dates](#): These are the deadlines and major events that occur throughout a typical academic year. These deadlines and events also appear in the timeline under the relevant month.
- [As-Needed Tasks](#): This list of tasks, divided by category, are typically performed on an ad hoc and/or ongoing basis throughout an academic year.
- [Recurring Events/Tasks](#): These tasks occur at a regular frequency (monthly, quarterly, annually), but the actual dates they occur vary widely by institution.
- [Timeline](#) (July through June): These tasks are performed at particular times during the academic year and are fairly standard across institutions. They are often tied to requirements from an outside organization (e.g., the ACGME, National Residency Matching Program [NRMP]).

## Contacts

The names and contact information for important contacts can be added to this customizable table.

| Position   | Name | Email | Phone Number |
|--|------|-------|--------------|
| Designated Institutional Official (DIO)                        |      |       |              |
| Chief Marketing Officer  |      |       |              |
| Chief Quality Officer  |      |       |              |
| Program Directors<br>(add rows as needed)                      |      |       |              |
| Chief Residents<br>(add rows as needed)                        |      |       |              |
| Nursing Supervisor/<br>Chief of Nursing                        |      |       |              |
| Institutional Review Board Contact                             |      |       |              |
| Patient Safety and Quality Improvement Contact                 |      |       |              |
| System Quality Representative                                  |      |       |              |
| ACGME Executive Director of the Institutional Review Committee |      |       |              |

## Important Dates

This section outlines the major dates and deadlines of a typical academic year and is organized by source (the entity responsible for setting the dates).

In the “Event/Deadline” column, the approximate time of year each event/deadline occurs is noted in parentheses, but coordinators should add the exact dates and deadlines in the “Date” column. These dates may change slightly from year to year, and it is important to check with the Sponsoring Institution and/or the websites of relevant organizations for current information.

**Source: Sponsoring Institution**

| Event/Deadline  | Date |
|---|------|
| <b>START DATE:</b> Orientation and Welcome Events ( <i>June, July, or August</i> )  |      |
| <b>DEADLINE:</b> Semi-Annual Resident/Fellow Evaluations ( <i>varies by program/institution, typically December</i> )       |      |
| <b>DEADLINE:</b> End-of-Year/Summative Resident/Fellow Evaluations ( <i>varies by program/institution, typically June</i> ) |      |
| <b>DATE:</b> Graduation Ceremony ( <i>June</i> )  |      |

**Source: [Association of American Medical Colleges \(AAMC\)/Electronic Residency Application Service \(ERAS\)](#)**

| Event/Deadline   | Date |
|--|------|
| <b>OPENING DATE:</b> ERAS ( <i>mid-September</i> )                     |      |
| <b>OPENING DATE:</b> ERAS Opens for Registration ( <i>early June</i> ) |      |

**Source: [Association of American Medical Colleges \(AAMC\)/GME Track](#)**

| Event/Deadline   | Date |
|--|------|
| <b>START DATE:</b> National GME Census: Program Survey ( <i>mid-May</i> )                                    |      |
| <b>DEADLINE:</b> National GME Census: Program Survey (and August FREIDA listing) ( <i>mid-to late July</i> ) |      |
| <b>DEADLINE:</b> National GME Census (and October FREIDA listing) ( <i>late September</i> )                  |      |
| <b>FINAL DEADLINE:</b> National GME Census (both Program and Resident Surveys) ( <i>mid-December</i> )       |      |

**Source: [Accreditation Council for Graduate Medical Education \(ACGME\)](#)**

| Event/Deadline   | Date |
|--|------|
| <b>DEADLINE:</b> ACGME Annual Update ( <i>varies by specialty and/or institution, either late August or late September</i> )             |      |
| <b>DEADLINE:</b> ACGME Residents/Fellows and Faculty Members Complete Surveys ( <i>varies by specialty, between February and April</i> ) |      |
| <b>START DATE:</b> ACGME Annual Educational Conference ( <i>late February/early March</i> )  |      |

**Source: [National Residency Matching Program \(NRMP\)](#)**

| Event/Deadline   | Date |
|--|------|
| <b>OPENING DATE:</b> NRMP registration opens ( <i>mid-September</i> )      |      |
| <b>DEADLINE:</b> NRMP Quota for Residency Programs ( <i>late January</i> ) |      |
| <b>DEADLINE:</b> Rank Order List Certification ( <i>early March</i> )      |      |

## As-Needed Tasks

These tasks/events are typically scheduled on an as-needed basis throughout the academic year. The exact dates and frequencies may vary by Sponsoring Institution, and not all items included will apply to all institutions, so it may be helpful to cut and paste the events and tasks in this section into the [appropriate month](#) for the Sponsoring Institution.

## Accreditation

### Miscellaneous Accreditation Tasks

- Monitor accreditation progress reports and plans
- Process affiliation agreements and Program Letters of Agreement (PLAs)
- Monitor and facilitate designated institutional official (DIO) approval of new program applications, program director changes, temporary and permanent complement increases, and participating sites additions and deletions
- Compile data for the Institutional “Scorecard” (previously called the Dean’s Matrix); data may include program accreditation information, quality data points, and demographic information.

### Special Review Process

As part of the ACGME accreditation process, the Graduate Medical Education Committee (GMEC) demonstrates effective oversight of underperforming programs through the Special Review process. As part of the Special Review process, the institutional coordinator may be responsible for the following:

- Assembling the Special Review committee
- Attending the Special Review meeting
- Writing/compiling the Special Review report
- Creating a crosswalk analysis, if applicable
- Preparing monitoring plans

### Administration

- Process new visas and visa renewals (at some institutions, this task may be completed at the program level)
- Monitor medical licensure
- Monitor clinical and educational work hours and moonlighting
- Monitor quality metrics (e.g., board scores)
- Monitor website content
- Track leaves of absence
- Track disciplinary actions
- Manage stipends for on-call meals
- Review, update, and disseminate policies
- Provide administrative support for house staff
- Monitor clearance process for rotators (visiting residents and medical students)
- Manage call room
- Plan logistics and prepare agendas for institutional lectures and educational series

- Monitor orientation and curriculum modules (typically done April through December, but may vary by institution)
- Process visiting residents

### **Professional Development**

- Plan logistics and develop agendas for coordinator professional development
- Plan logistics and develop agendas for faculty professional development

### **Recurring Events/Tasks**

These tasks/events are typically scheduled on a monthly, quarterly, or annual basis. The exact dates and frequencies may vary by Sponsoring Institution, and not all items will apply to all institutions, so it may be helpful to cut and paste the events and tasks in this section into the [appropriate month](#) for the Sponsoring Institution.

### **Accreditation**

#### **Clinical Learning Environment Review (CLER) Visits**

*WHEN:* Every 24 months (+/- six months)

Sponsoring Institutions must undergo [CLER](#) Site Visits to maintain ACGME accreditation. As part of the site visit process, the institutional coordinator may be responsible for:

- Surveying participating sites
- Creating crosswalk SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis
- Coordinating site visit logistics
- Team rounding
- Following up when the CLER Report is received
- Developing an action plan based on that feedback

#### **Statement of Commitment**

*WHEN:* Every five years

To maintain ACGME accreditation, Sponsoring Institutions must have a written statement that documents its financial commitment to GME. The institutional coordinator may be responsible for:

- Ensuring the Statement of Commitment is up to date
- Ensuring the Statement of Commitment is dated and signed at least once every five years by the DIO, a representative of the Sponsoring Institution's senior administration, and a representative of the Sponsoring Institution's governing body.

## **Administration**

- Coordinate external housing  
*WHEN:* Typically, monthly (varies by Sponsoring Institution)
- Review and update the residency management system  
*WHEN:* Typically, monthly (varies by Sponsoring Institution)
- Attend executive-level management (C-suite) meetings  
*WHEN:* Typically, monthly (varies by Sponsoring Institution)
- Attend quality improvement team meetings  
*WHEN:* Typically, monthly (varies by Sponsoring Institution)
- Monitor work hours/clinical and educational work hours  
*WHEN:* Typically, monthly (varies by Sponsoring Institution)
- Edit and distribute the institution's newsletter  
*WHEN:* Typically, monthly or quarterly (varies by Sponsoring Institution)
- Manage GME stipends for travel, continuing medical education, and technology  
*WHEN:* Typically, annually (varies by Sponsoring Institution)
- Plan the house staff appreciation event (e.g., luncheon)  
*WHEN:* Typically, annually (varies by Sponsoring Institution)
- Generate and collect signatures for contracts and reappointments  
*WHEN:* Typically, annually (varies by Sponsoring Institution)

## **Budgets**

*WHEN:* Annually

Not all institutional coordinators take part in the budget process, but some are responsible for the following tasks. Budgeting cycles vary by Sponsoring Institution, but typically occur between October and December.

- Take part in the preparation of the GME department operational budgets
- Collect and store all program budgets

## **Evaluations**

- Administer program director evaluations  
*WHEN:* Typically, annually or biennially (varies by Sponsoring Institution)

## **Graduate Medical Education Committee (GMEC)**

- Plan logistics and develop agenda/content/letters for GMEC meetings  
*WHEN:* Typically, monthly or quarterly (varies by Sponsoring Institution)
- Plan logistics and develop agenda/content/letters for GMEC subcommittee meetings  
*WHEN:* Typically, monthly or quarterly (varies by Sponsoring Institution)

## **Professional Development**

- Plan logistics and develop agenda for the institutional retreat  
*WHEN:* Typically, annually (varies by Sponsoring Institution)

## **Recruitment**

- Quality check/ensure completion of rank order lists for fellowship programs  
*WHEN:* The deadlines for fellowship rank order list certification vary by fellowship and are scheduled throughout the year; see the [NRMP website](#) for the exact dates

## **Timeline**

### **July**

#### **Administration**

- Deadline for National GME Census: Program Survey; institutional coordinators typically provide guidance for institutional-specific questions. Visit the [Association of American Medical Colleges website \(AAMC\) website for details](#).

### **December**

#### **Evaluations**

- Semi-annual resident/fellow evaluations are typically due in December (and sometimes through January); institutional coordinators monitor the process and administer quality checks

### **January**

#### **Accreditation**

- Begin compiling data for the Annual Institutional Review (e.g., ACGME Resident/Fellow and Faculty Survey results, accreditation information for all accredited programs); data collection extends into February
- Begin receiving ACGME Letters of Notification for accredited programs; letters are typically received through May

#### **Administration**

- Prepare the GME Handbook for faculty members and onboarding residents/fellows

## ***February***

### **Recruitment**

- Quality check/ensure completion of rank order lists for residency programs; the deadline is in late February/Early March. Check the [NRMP website](#) for the exact date.

## ***March***

### **Administration**

- Prepare the GME Handbook for faculty members and onboarding residents/fellows
- In preparation for onboarding, manage the roster and clinical skills lab

### **Recruitment**

- Upload Electronic Residency Application Service (ERAS) data for residencies to the resident management system

## ***May***

### **Accreditation**

- Review the case logs and send reminders, if necessary; this typically occurs at the end of the academic year but may vary by Sponsoring Institution
- Begin reviewing the quality metrics data (e.g., board scores); this typically extends into June

### **Administration**

- Review affiliation agreements and Program Letters of Agreement (PLAs)
- Review the GME Handbook for faculty members and onboarding residents/fellows
- Begin planning and sending invitations for the institutional graduation, if applicable
- Begin planning and sending invitations for the institution-level awards (e.g., faculty members, learners)
- Order and collect signatures for graduation certificates; varies by institution
- Begin the academic year rollover process; typically extends into June
- Begin gathering and tracking alumni contact information for administration of the alumni survey; typically extends into June
- Review and edit website content to prepare for the next academic year; often runs into June

### **Evaluations**

- Distribute and collect the GME house staff survey



## ***June***

### **Administration**

- Organize/plan the hospital orientation, which occurs prior to program orientation

### **Evaluations**

- Perform a quality check on/ensure completion of the end-of-year resident/fellow evaluations. Evaluations are performed at the program level.
- Perform a quality check on/ensure completion of Annual Program Evaluations (performed at the program level); some coordinators may create a template to collect the information from programs.

### **Graduation**

- Manage the check-out process for graduating residents/fellows (e.g., collect badges, phones, pagers)
- Perform a quality check on verification of education forms; verification of education is performed at the program level

### **Recruitment**

- Electronic Residency Application Service (ERAS) opens for registration