ResiTrak Year-End FAQs

ASHP requires end-of-year self-evaluations by residents. How do I do this in ResiTrak?
ResiTrak automatically schedules an end-of-year self-evaluation to be completed by the resident. This evaluation includes all goals assigned to the resident. The due date for this evaluation is the last day of the resident’s program. As with all evaluations, residents can complete it early by clicking on the task in their task list on the home screen. (If it does not appear, first be sure that the drop-down above the task list is showing all tasks. If it is still not visible, it has either been completed or deleted.) RPDs can see whether it is scheduled or change its due date by going to Manage Tasks and Evaluations, selecting the resident, and selecting to view evaluations not associated with a learning experience.

What can I do now to prepare for the end of the residency year?

Check overdue tasks list
Check the overdue task list. RPDs have a link at the top of the home screen, above their task list. A report is available in Resident-Specific Reports for RPDs and Residency Administrators. You may need to delete or reassign some tasks in “Manage Tasks and Evaluations” in the Preceptor menu. If the RPD needs to co-sign an evaluation in place of a preceptor (e.g. if the preceptor has left the institution), please contact support@mccreadiegroup.com for assistance.

Check goals marked ACHR for each resident report
Check to see which goals have not been marked achieved for each resident, using the report in “resident-specific reports” in the reports menu. You can mark goals as achieved from the Customized Plan screen (RPD menu), by clicking the “mark goals as achieved/not achieved” link after selecting the appropriate resident.

What do I need to do once my resident is really done?
Residents need to be closed out when they complete or otherwise leave your program, even if they are still at your site as a PGY2 resident or as an employee. Closing out the residents will stop all task e-mails for that residency year, and will prevent inadvertent changes to their data. The evaluations and training plans for the closed-out residents will still be available in the Reports menu. Wait to close out the resident until you are completely done with all of the resident’s records in ResiTrak, because no changes can be made once the resident is closed out. To close out a resident, choose the Resident Closeout option on the RPD menu.
I have new residents coming, old residents leaving, and I need to make changes to my program. What do I do when?

The optimal timing for making changes to your program is as follows:

- Update your residency program outcomes, goals, and objectives (through “residency setup”) before enrolling new residents. If you make changes to outcomes, goals, and objectives after a resident is enrolled, check (and change if necessary) each resident’s assigned outcomes, goals, and objectives from the Customized Plan screen (RPD menu), by clicking the Mark Goals as Achieved/Not Achieved link.
- Update the RPD in ResiTrak (Residency Setup in the RPD menu) at the point in time you want it to take effect. (Don’t forget to also contact ASHP.)
- Update goals for your learning experiences after current residents have completed their evaluations but before you put the learning experiences on new residents’ schedules.

I have a few extra minutes. What can I do to review my program in ResiTrak, and clean up my data?

Close out all residents who are no longer in your residency program (residents who either completed the program or left for any reason). To do this, go to “resident closeout” in the RPD menu.

Remove any ResiTrak preceptors who are not currently participating in your residency program. To do this, go to “user manager” in the RPD menu, and click “remove” next to the user’s name.

Review the Goals Evaluated in LEs report, found in Site Reports (Reports menu). This report allows you to review which goals are evaluated in each learning experience. Perhaps one goal is evaluated too infrequently or too often, or a learning experience contains too many or too few goals.

Review Goals Scored NA report, found in Preceptor and Learning Experience Reports. Select Learning Experience Evaluations, select the residency program, select appropriate due dates, click the Filter button, and then click the Goals Scored Not Applicable link. This report is available to Site Setup Users, RPDs, and Residency Administrators.

I still have questions. What next?

Please feel free to contact ResiTrak Support with any questions. Email to support@mccreadiegroup.com is our preference. If you prefer to talk a live person, or if you have a complicated question, please call us at 734-661-7955, option 4.