

CHGME Intern and Resident Template Instructions

I. Open the *CHGME I&R Low-No Listing.xls* file

- When opening the file, click to enable macros, if prompted (may have to adjust macro security level, if using Office XP)

II. Enter the General Provider Information

- Provider's Name
- Medicare Provider Number
- Fiscal Year Beginning
- Fiscal Year Ending.

III. Insert Data from a Previous IRIS

- This allows you to import a prior year IRIS or a current year IRIS that was already created.
- The files must be in the IRIS format of a "A" (assignment) and a "M" (master) file
- Any rotations already entered in the template will be overwritten by the IRIS import
- When prompted find the "A" – Assignment file and load it. Then find the "M" – Master file when prompted.
- The data is now in the template and can be altered in any way and then an IRIS can be recreated

IV. Enter Resident/Intern Information Based on the Column Headings

- If you are unsure what a column heading refers to, click on the *HELP* button at the top of the column, if available.

Note: Separately list each of the residents' individual rotations during the fiscal year (this means the same resident can be listed more than once if more than one rotation occurred at this facility during the fiscal year).

NOTE: Most of the following field descriptions are directly from the CMS IRIS software documentation.

SSN

Enter the intern/resident's (IR) Social Security Number (SSN). Include ONLY those IRs who participate in approved teaching programs.

The SSN must be 10 characters with the first character being a "U" for U.S. or a "C" for Canada.

Name

Enter the intern/resident's complete first name, middle initial, and last name. Do not use nicknames or abbreviations such as Bob in lieu of Robert or Chuck or Charlie in lieu of Charles. Do not use suffixes such as "Jr."

or "II". If the last name is more than 20 characters long, use only the first 20 characters.

Employer

Enter the name of the employer that is currently paying the intern/resident's salary.

Initial Specialty Code / Description

Select the 4 digit Residency Type Code for the specialty program in which the intern/resident (IR) is seeking Board certification. Codes are grouped as follows:

- 1050-2955 Medical (allopathic) specialties
- 3050-6400 Osteopathic specialties
- 7050-7150 Podiatric specialties
- 8050-8550 Dental specialties
- 9050-9100 Other specialties (emergency medicine)
- 9150-9950 Reserved for future use

Some medical specialties include one or more subspecialties, each of which is assigned a separate code. In addition, many of the medical specialties are the same as osteopathic specialties, which are assigned a different set of unique codes. For example, the medical specialty code for internal medicine is 1400; the osteopathic specialty code for internal medicine is 3900.

Note: The Initial Specialty description and Initial Specialty Years will automatically be filled in by the software when a Specialty Code is selected.

Initial Specialty Years

Enter the minimum number of resident training years required for Board certification in the initial specialty. Program defaults to the current published number based on the initial specialty code selected, but it needs to be verified against your records. This number may need to be increased if the resident's FIRST assignment started before July 1, 1995.

Medical School

Select the Medical School from which the intern/resident (IR) graduated. Select "FOREIGN DENTAL SCHOOLS" or "FOREIGN MEDICAL SCHOOLS" for foreign graduates.

Medical School Graduation Date

Enter the date the intern/resident graduated from medical school in the format "mm/dd/yyyy". If the graduation month is known, but the specific day of the month cannot be determined enter the first day of the month.

FMG Complete Date

This should ONLY be completed, if the medical school code selected is "FOREIGN MEDICAL SCHOOLS".

Enter the date the IR passed the United States Medical Licensing Examination

(USMLE), Parts I and II OR prior to July 1, 1986, received certification from, or passed an examination of, the Educational Committee for Foreign Medical Graduates.

Current Specialty Code / Description / Type

Select the program specialty code the resident is currently working on for Board Certification. For Example: Surgery, Pediatric Surgery. This may not be the same as the initial specialty!

- 1050-2955 Medical (allopathic) specialties
- 3050-6400 Osteopathic specialties
- 7050-7150 Podiatric specialties
- 8050-8550 Dental specialties
- 9050-9100 Other specialties (emergency medicine)
- 9150-9950 Reserved for future use

Note: The Current Specialty Description and Current Specialty Type will automatically be filled in by the software when a Current Specialty Code is selected.

Beginning / Ending Assignment Dates

Enter start and end dates of each rotational assignment during which the intern/resident (IR) was assigned to and worked at the hospital or any of its hospital based providers (Home Health Agency, Skilled Nursing Facility, etc.)

Include any time that the IR worked in nonprovider settings such as free-standing clinics, nursing homes, and physicians' offices in connection with approved programs, IF THE IR SPENT TIME IN PATIENT CARE ACTIVITIES, AND THERE IS A WRITTEN AGREEMENT BETWEEN THE HOSPITAL AND THE OUTSIDE ENTITY STIPULATING THAT THE HOSPITAL PAYS THE IR'S SALARY FOR TRAINING TIME OUTSIDE THE HOSPITAL SETTING. Refer to 42 CFR 413.78 and 412.105(f).

All start and end dates MUST LIE WITHIN THE FISCAL YEAR for which you are reporting, and assignment periods MAY NOT OVERLAP! For example, if the fiscal year runs from 7/1/98 to 6/30/99, and an assignment runs from 5/1/99 to 7/31/99, the assignment period reported during this reporting year is from 5/1/99 to 6/30/99. An end date MAY NOT BE LATER than the end of the hospital's cost reporting period.

NOTE: IRIS provides space (fields) to report 60 individual rotations for an IR.

Year of Residency

The total number of training years the IR (Intern/Resident) completed in an approved training program as of the FIRST DAY OF THE ROTATION being listed. For example, enter "0" if the IR has completed less than one year in all types of approved programs, "1" if the IR has completed less than two years, etc. NOTE: Include time spent in transitional year programs as discussed in the

Help Screen notes on "Type of Residency".

Full/Part Time Percentage

Enter 100 for full time residents. For Part Time residents, enter the percentage of the FTE, as indicated on either the employment contract or letter from the ACGME. Note: A hospital must receive permission from the ACGME to allow a resident to work part time. Refer to 42 CFR

412.105(f). Do NOT enter the % sign (i.e., 50% enter as 50)

GME Percentage

Enter the percentage of time the intern/resident (IR) worked in any area of the hospital complex or in a nonprovider setting under agreement with the hospital, during the assignment period. Refer to 42 CFR 413.78.

If the IR worked in more than one hospital or nonprovider setting not under agreement with the hospital during the assignment period, enter the percentage of time worked in the hospital in comparison to the total time worked at all facilities. Example: an IR worked 4 hours/day at hospital A and 8 hours/day at hospital B. Hospital A would report 33% under Graduate Medical Education (GME). If the IR worked 4 days a week at hospital A and 3 days a week at hospital B, hospital A would report 57% (4 days at hospital A divided by 7 total days).

NOTE: The GME percentage may be computed based upon hours, days, or even months, if appropriate. No more than 100%, in the aggregate may be reported for any IR by all hospitals reporting. HOSPITALS MUST COORDINATE GME DATA REPORTED IN IRIS.

CHGME Unweighted FTEs

Calculated based on the following:

(Period Assigned to this provider, in this rotation, divided by 365 or 366 days)
x
(Full-Time / Part-Time Percentage) x (GME Percentage)

Note: If the Intern/Resident is listed as a foreign graduate but no FMG Complete

Date is entered, the Unweighted FTE will be reduced to 0.

Note: If the Intern/Resident rotation has assignment dates before or after the fiscal year, the Unweighted FTE will be reduced to 0.

CHGME Weighted FTEs

Calculated based on the following:

(Period Assigned to this provider, in this rotation, divided by 365 or 366 days)
x
(Full-Time / Part-Time Percentage) x (GME Percentage) x (Weight Factor of 1 or .5)

Note: The weight factor is reduced to .5 if the Residency Years

completed equals or exceeds the Initial Specialty Years.

Note: If the Intern/Resident is listed as a foreign graduate but no FMG Complete Date is entered, the Weighted FTE will be reduced to 0.

Note: If the Intern/Resident rotation has assignment dates before or after the fiscal year, the Weighted FTE will be reduced to 0.

Note: Summary totals of CHGME Unweighted and Weighted FTEs can be seen in the upper right corner of the CHGME worksheet. These totals are based on the information entered and do not account for any duplicate assignment periods (overlaps).

V. Add Rows Button

- Click this button to add as many rows to the spreadsheet as you need (up to 4000)

VI. Delete Extra Rows Button

- Click this button to delete blank rows and any rows without SSN entered.
This will help reduce the file size when saving to disk.

VII. Insert Rows Button

- Click this button after selecting the rows where you want to insert new rows

VIII. Update Totals Report Button

- Click this button at the top of the CHGME worksheet to view a summary report of Weighted and Unweighted Interns/Residents by Current Specialty. You must click this button any time you want a current report based on the data entered.
- To return to the CHGME entry worksheet, click the “CHGME” worksheet tab at the bottom of the screen.

IX. Print Button

- Click this button to print the CHGME resident listing

X. Create IRIS Files

- Click this button when you are completely done entering intern/resident data. This will create the necessary Master and Assignment database files needed for the IRIS program or other compatible programs.

Note: When this button is selected, the file will automatically be saved and closed after creating the IRIS files.

- This is not a necessary step, but it is a tool if exporting into another IRIS program is desired.

Note: When transferring this template to authorized individuals, do not use Internet e-mail. The material in this template includes protected health information that is subject to use and disclosure restrictions under federal

law.

CHGME IRIS PROXY

- 05/27/03 - If no graduation date is entered, the FTE is reduced to 0.
- 05/27/03 - If FOREIGN DENTAL SCHOOLS is selected, no FMG date should be entered.
- 05/27/03 - Updated the default specialty years to ACGME changes effective 7/1/1999.
- 06/05/03 - Changed 7/1/1999 specialty year changes to be based on rotation start date.
- 06/05/03 - Changed heading on residency years completed column.
- 06/05/03 - Added more edit checks for ending rotation date being after beginning date; grad date being prior to rotation start; and FMG date being prior to rotation start.
- 06/05/03 - Added line auto-fill out after entering SSN the same as a previous SSN
- 07/29/03 - Added Import Previous IRIS function
- 07/29/03 - Added Insert Rows Button
- 07/29/03 - Corrected a problem with totals not calculating past 2000 rotations
- 07/29/03 - Added Edit Messages to explain when an FTE is reduced to Zero
- 07/29/03 - Added option to make IME % zero or equal to GME %
- 07/29/03 - Added all HRSA 99-1 Summary totals needed
- 10/09/03 - Corrected how the FTEs were calculated on short year providers. It was using the short year as the denominator and now it is using 365 or 366 days.
- 10/22/03 - Corrected IRIS - it wasn't pulling all records
- 11/07/03 - Added a feature to make sure that all key fields were being filled out prior to allowing the creation of an IRIS
- 12/02/03 - Corrected 2 digit year issue on the Foreign Cert date so that it will pass IRISEDV3 edits on non-XP machines. Had no impact otherwise.
- 08/02/05 - Corrected regulation references based on the August 11, 2004 Federal Register (42 CFR 713.86 has been moved).
- 08/26/06 - Added new/revised Medical School Codes and Residency Type Codes.

10/18/06 - Corrected Visual Basic formula to pick up additional program codes.

11/28/07 - Updated formulas to include correct foreign medical school lookup cell.
Locked cells that identify Initial and Current Specialty descriptions.

10/15/12 - Updated with medical school and residency codes available from CMS. File has been converted to DOS-compatible Excel (97/2003).