Procedure for UB and Visiting Residents Rotating to Kaleida Health

Training Program Administrators who manage trainees in University at Buffalo Residency or Fellowship Programs should follow the procedure below at **least 30 days in advance of the start date of the rotation**.

Failure to follow the procedures in the order noted below will delay the ability for the resident to function as a member of the patient care team on the first day of the rotation.

1. Training Program Administrator contacts Kaleida Health Medical Staff Office at 859-5502 or 859-5509 and provides the information necessary for Medical Staff Office to enter the resident into IntelliCred, the medical staff database. This information will include the start and end date of the rotation;
   - If the resident is doing an outpatient rotation, training program administrator should also contact Dr. Sanford Levy at slevy@kaleidahealth.org as the automated assignment of EMR training is based on inpatient and this will need to be manually modified;
2. Within 24 hours of entry of the resident into the medical staff office database, IntelliCred, the resident will receive an auto-generated Courion email with instructions. The resident should add Courion@kaleidahealth.org to their email address book now so this important email from Courion does not go into their spam folder;
3. The Courion email will instruct resident/fellow to navigate to **KPass** and register and then create a password. After they have done this, each must navigate to "Talent Management" at www.kaleidatms.com and log in (using the "user name" of 3 letters followed by 3 numbers provided in the Courion email, preceded by Kaleida\ (such that the name is entered **Kaleida\3 letters followed by 3 numbers**) and the password that you just created in KPass). Follow the prompts to complete the required training. If the resident encounters difficulty, s/he should call the Kaleida Help Desk at 859-7777;
4. Within 2 business days of completion of the required EMR training, the resident will be granted access to PowerChart, the Kaleida EMR. Thus, for the resident to have access to the EMR on Monday morning of their rotation, **they must complete all EMR training by midnight on the prior Thursday;**
5. Rotating or visiting residents should navigate to https://www.kaleidahealth.org/ISTSecurity and on the form, they should request the following and proceed according to the bullet points below:
   - InfoClique
   - PowerChart
   - Remote access
   - PACS
- Select "other" for "Access Type" (do **NOT** select "Physician");

- Enter "visiting resident" twice
  - Once in the field for "Other" and
  - Once in the field for "Job Title"
- Fax number is a required field – you may enter "999-9999";
- The individual may leave the "Kaleida Associate Number" field blank;
- In the "Comments" field, residents should enter their unique 5 digit DEA suffix;
- In the field of supervisor, enter the name of the residency coordinator for the specialty in which you are doing your rotation;
- You will need to enter the phone number and fax number of the residency coordinator, as these are required fields;

6. A specialist in Kaleida IT Security Department will configure the resident/fellow for InfoClique access, remote access, PACS, Dragon (voice recognition dictation), and electronic prescribing;

   NOTE: EMR access will not be granted until the resident has completed web-based training – see bullets 3 and 4 above)

7. Once on site at Kaleida, the resident will need to obtain a Kaleida ID badge. The security guard at the main entrance can guide the resident as to how to obtain an ID badge;

8. **NOTE:** The rotating or visiting resident will have EMR access terminated 5 business days after the end date of the clinical rotation (allowing the resident to follow up for educational purposes by viewing PowerChart. In addition, any any unsigned orders or dictations from the final day of the rotation must be completed).