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## Revision Log

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1 Introduction

In support of New Resident Enrollment and OITE registration, AAOS has developed a Resident Management Portal platform for United States and Canadian Residency Program Coordinators. This platform will open on April 1 and remain active through September 30 each year. October 1 through March 31 each year the portal will be limited to view only access. The Resident Management Portal supports the Membership Team's New Resident Enrollment and Resident Transition process. Residency Program Coordinators will access the portal to enroll their PGY1 Residents and provide transition information for graduating Residents entering fellowship training or practice. Additionally, the Resident Management Portal will support the Exam Team's Orthopaedic In-Training Exam (OITE) registration. Residency Program Coordinators will access the portal to register their program's residents who will be taking the exam.

Only Residency Program Directors and Coordinators will have access to the Resident Management Portal.

2 Resident Management Portal (RMP)

2.1 Tab: Overview

The RMP provides Orthopaedic Residency Directors and Coordinators the ability to upload, manage and add residents to the roster, update resident PGY, and enter transition information as residents near the end of their residency. Enrollment for the academic year will begin on April 1. Please note, transitions for Post Graduate Year (PGY) 5 residents can be entered through July 31.

2.2 Tab: Roster

Within the roster tab, you can add residents, update resident PGY, and enter transition information as residents near the end of their residency. New Resident Enrollment will be open annually between April 1 and August 31. PGYS5 transitions can be entered each year through July 31.

2.3 Tab: OITE

Registration for residents taking the Orthopaedic In-training Examination (OITE) administration occurs annually from September 1 through September 30. Residency coordinators must complete the OITE registration on the Resident Management Portal.

2.4 Tab: Resident Curriculum

This tab is currently inactive. Details and instruction will be provided once this tab is activated.
2.5 Tab: Order Summary

This tab will display your residency program’s number of confirmed OITE registrations.

3 New Resident Enrollment and Transitions

Each year, beginning in April, the AAOS Membership Specialist works with U.S. and Canadian Residency Program Coordinators to enroll their program’s new residents and transition graduating PGY5 residents. U.S. and Canadian Residency Program residents receive complimentary membership while they are in training.

New Resident Membership begins July 1 each year. During this enrollment period, Residency Program Coordinators are to provide their PGY5 residents’ post-graduate intentions. U.S. and Canadian Residency Program Coordinators will use the AAOS Resident Management Portal to enroll their new PGY1 residents and transition their graduating PGY5 residents. *Residency Program Coordinators do not need to increment their PGY2-4 residents.* The Academy will increment all residents in mass post June 30 to the next PGY level.

3.1 Enrollment and Transition Timeframe

New Resident Enrollment and Roster Edits: April 1 – August 31

PGY5 Transitions: April 1 – July 31

3.2 Accessing and logging into the Resident Management Portal

To access the AAOS Resident Management Portal, Residency Program Coordinators will visit the below URL:

https://residentmanagement.aaos.org/

This URL will guide you to the Single Sign-On (SSO) login page. Proceed to enter your username and password. Once you are logged in, you will reach the Portal's Overview tab.
Once you have reached the Overview tab, to the right, you will see the Roster Tab. Use this tab to view your program’s roster, add new residents, edit residents, and enter resident transitions.

3.3 How to search for a resident

To search for a resident to add to your roster, you will click on the ADD RESIDENT tab located at the top right of the roster table. Once you click on this button, a Resident Search window will open. You will have the ability to enter your Resident’s First Name (Optional), Last Name, and Email (Optional). Once you have entered your Resident’s details, you will click the red SEARCH button located at the bottom right of the Resident Search window.
3.4 How to add a resident

Upon clicking the SEARCH button, a new window will open titled Search Results.

If you locate a record for your program’s new Resident, click the appropriate radio button by this name and then click the red ADD RESIDENT button. If you do not find a record for your new Resident, select the radio button that displays "Add New Resident. None of the residents below match. Please add a new one." Then click on the red ADD RESIDENT button. Upon clicking the red ADD RESIDENT button, a new window will pop up titled Add Resident.
Within this window, you will add the Resident's First Name, Last Name, and Email. The Start Date will be pre-populated with 7/1 of the current year, and the end date will be populated with 6/30 five years out. The start date of 7/1 and the end date of 6/30 are non-editable. You can update the year by clicking on the calendar icon located to the right of the Start Date field and End Date field. Once you select the year you will need to proceed to select the start date of July 1 and end date of June 30. No other start and end dates outside of July 1 and June 30 are available for selection. Click SAVE when all fields are filled in.
*Note, after clicking on SAVE, if a red error message pops up that a resident was not saved, this could indicate that there is a record already on file for this individual. If you experience this error message, hit the CANCEL button, and go back to the Resident Search window (3.3 How to search for a resident). This time, DO NOT enter an Email Address, and only search by First and/or Last Name.

3.5 How to edit a resident
You can edit a resident within the Roster tab. To edit a resident, click on the ellipsis menu to the right of each Resident for a list of additional options.
Select the Edit option. An Edit Resident window will appear where you can update your Resident's PGY start and end date year. **Only the year of the resident’s start and end date can be changed.** When you need to change the resident start or end date, you must select the year from the dropdown, then month (June or July), followed by day (July 1 or June 30), and click SAVE. Start dates can only be July 1 and end dates must be June 30. Updates to name and email can only be made by the resident.

![Edit Resident window](image)

### 3.6 How to remove a resident who leaves your program*

To remove a resident from your program, click on the ellipsis menu to the right of each Resident. Select the Remove option. You will receive a pop-up window titled "Removal Confirmation", asking you if you are sure you want to remove this Resident. If you are sure, click the red REMOVE button. *The only time you will remove a resident is if the resident is leaving your program. Do not remove graduating residents who need to be transitioned to either fellowship program training or practice. If you remove a graduating resident versus transitioning the graduate resident, the resident will lose all AAOS Membership and benefits and will not transition to the correct Member category post residency graduation.*
3.7 How to sort by PGY Year

Filter the roster by Post Graduate Year using the "Filter by PGY" dropdown feature located at the left top of your program’s roster.

3.8 How to sort by name

To sort your residents alphabetically by the last name, hover over your program’s roster column titled RESIDENT. An arrow will appear that you can click up or down to sort accordingly.

3.9 How to enter transitions

To enter PGY5 resident transitions, click on the ellipsis menu to the right of the transitioning Resident name. Select the transition option. A Resident Transition window will pop up where you have the option to indicate that your Resident is entering practice or an orthopaedic fellowship program. If the Resident is entering practice, upon selecting this option and clicking the red SAVE button, the transition is
complete, and no other windows are required for completion. Once a resident is transitioned, options to edit and delete are deactivated and the resident will show as transitioned upon hovering over the ellipsis.

If your Resident is entering an orthopaedic fellowship training program, select the radio button that displays “The resident is entering an orthopaedic fellowship program”. Once this option is selected a Resident Transition pop-up window will appear. You will enter the Fellowship Program details within this window, including Institution, location, subspecialty, and begin and end dates. Once these details have been entered, click the red SAVE button.

3.10 When to reach out to the AAOS Membership Specialist
Residency Program Coordinators should reach out to the AAOS Membership Specialist for all transactions that cannot be completed in the AAOS Resident Management Portal. Examples are Residency Program name changes, residents who take a leave for research or military duty and are coming back, if an error is made in transitioning the resident, difficulty adding a new resident, when Program Directors and/or Coordinators need updating, and for any difficulties being experienced when enrolling and transitioning residents. To reach out to the Membership specialist send an email to Join@aaos.org.
4 OITE Registrations

Registration for the Orthopaedic In-training Examination (OITE) occurs annually from September 1 through September 30.

4.1 How to register a resident for OITE

Log into the AAOS Resident Management Portal at https://residentmanagement.aaos.org/ and click on the OITE tab. The OITE Registration screen will appear, showing all residents who are enrolled in your program. All residents in the program may be selected by clicking the box in the far-left column in the upper corner of the roster. This action will populate the selection boxes for ALL residents in the program. To select and register individual residents, click on the boxes next to each Resident's entry.

It is imperative that the Resident name, PGY, and email are correct (this should be validated during the resident enrollment and program roster review). If you observe any error in the resident information, contact the Membership Specialist at join@aaos.org to correct the error. Any unreported errors in the OITE registration roster will compromise the OITE results and score reports. The AAOS will not re-score OITE results that result from errors in residency program rosters.

Selecting ALL Residents
Selecting Individual Residents

4.2 How to remove a resident from OITE registration

To remove a resident from the OITE registration, click on the box to the left of the Resident's entry. Once the selection is removed, the box will appear blank.

4.3 How to save OITE roster

Once the OITE registration selection process is complete, click on the SAVE button at the roster's top right. A confirmation "✓ OK!" will appear on the screen. Not clicking save and clicking away to another tab will not hold your modifications.
4.4 How to review Order Summary

To review the summary page, click on the ORDER SUMMARY tab. The number of confirmed OITE registrations will appear.

5 Contact Us

For questions and inquiries about New Resident Enrollment and Transitions, please contact the Membership Specialist at join@aaos.org.

For questions and inquiries about OITE Registration, please contact the Assessment and Examinations Team at exams@aaos.org.