

2024 Annual Report Instructions

Please read all instructions before beginning your annual report.

Instructions are split into five separate sections:

- 1. Accessing your Annual Report page 2
- 2. Completing your Annual Report (Noted as "Application Updates NEW" in the portal) page 4
- 3. Completing Your Fellow Information (New in 2024) page 6
- 4. Submitting your Annual Report page 9
- 5. Helpful Tips page 11

Note:

- Sections 2, 3, and 4 must <u>all</u> be completed to finalize your application.
- NOTE: Completing only step 2 or step 3 or failing to click "Submit" at the end means that your application is not complete.
- While all instructions in this document are important, instructions for items that are either routinely missed or are new this year are called out by **bolding the text**, using red font, or highlighting in yellow.
 Please pay specific attention to these items.

These instructions are for currently accredited programs completing the ABBREVIATED **annual report in 2024 for the 2023-2024 Academic Year**. UCNS utilizes more than one application portal web address for submissions. The website to this portal is:

<u>https://webportalapp.com/sp/login/ucns_application_updates</u>. If you are using a shortcut on your desktop, please check to ensure you are accessing the correct portal.

Accessing Your Annual Report

- 1. Access the Program Updates Portal at: https://webportalapp.com/sp/login/ucns_application_updates
- 2. Enter your Login Credentials.
 - a. The email address is the program director's email address
 - i. There is only one account per program user credentials must be shared by all individuals accessing the account
 - b. If you have forgotten your password, click "Forgot your password" and a link will be sent to the **program director's** email address

ign In/Sign Up Instructions	Sign In
or New Users:	Email
y clicking Sign Up , you will be prompted to enter our email address and create a password. Once you ave chosen your password, your account will be eated and you will gain access to the nortal	Password
pr Returning Users:	Log In Forgot your password?
gn into the portal using the email address and the sssword you created when you originally signed up	Need an Account?
• the portal. If you have forgotten your password, ck "Forgot your password?" and follow the ompts to reset your password.	Sign Up

3. Click on the first box: "Application Updates."

The box must be Blue. If it is gold, you are not in the correct portal
 (<u>https://webportalapp.com/sp/login/ucns_application_updates</u>). Grey boxes are copies of
 previous submissions and cannot be edited but may be reviewed.

Accreditation Application Updates			Welcome, acarpenter1207+1811@gmail.com	0
Please click "+Create a Profile to Get St You cannot move forward until you have c	arted" to begin. You can always edit yo completed your Profile.	ur Profile by clicking "Edit".		
Profile			View	
To begin, click "+Get Started" below Whe • If the status bar is gray, your submis • If the status bar is blue, there is an a • If the status bar is red, there is an e	en you return to prmepage, you car sion is under re ind no action need ction required. ror. Please en price Administrato	e see the status of your submission by the ds to be taken. Card to complete. or of this program.	e colored status bar below the submission card.	
_	GN1811	GN1811	2021-12-21	
Add Another	Created on 02/09/2022	Created on 02/09/2022	Created on 01/04/2022	
	Application Updates	Copy of Application	Under Review	

- 4. Click "Edit" or "Open."
 - a. The button may say "Edit" or "Open" depending upon whether you have previously submitted an update. Both options are shown below. Instructions for completing your reaccreditation application after clicking either "Edit" or "Open" follow.
 - b. New in 2024: You will also see a new row this year titled Fellow Information on this screen. Instructions for completing the Fellow Information form follow later in the document.
 - c. You may complete either the Annual Report (Application Update NEW) or Fellow Information in any order. For the purposes of this document, the annual report is first followed by the fellow information. BOTH must be completed in order to submit your annual report.



OR



Completing Your Annual Report "Application Updates NEW"

- The annual report will save regularly as you complete it but be sure to click "Save Draft" before leaving the annual report to avoid losing your work.
- Due to delays in launching the annual report, this year's report is abbreviated. Future years
 will require completion of the entire report.
- 1. Click "Edit" or "Open" to access "Applications Updates NEW."
 - a. If your form says "Edit," please disregard the "Complete" note and the statement indicating the form is complete on the next page and proceed to completing the application. These are programming issues that we cannot correct at this time. If the tile you clicked into was blue and you are able to click "Edit," you have something to complete.

Application Updates NEW The button will update to reflect how you can interact with this step.	Complete	Edit
Fellow Information	C te	Edit

2. DO NOT EDIT THE "Subspecialty" FIELD

Subspecialty - do not delete *
Geriatric Neurology (GN)

- 3. Review and update the information in the following sections:
 - ✓ Fellow Enrollment✓ Fellow Completion

- Program Director Experiences and Qualifications
- ✓ Program Director Information

*If you have changes to submit for institutions, fellow complement, or duration, please submit a program change request.

- 4. All requested uploads must be updated/submitted using the templates provided. Templates are available by clicking the link in the section or clicking <u>here</u>.
 - a. You may only upload one document per upload section. If you have multiple files, they must be combined into one file (.pdf, .docx). ZIP FILES ARE NOT COMPATIBLE AND CANNOT BE USED.

Sponsoring Institution Letter Download the template provided for the Institution Letter and up be signed by the sponsoring institution's ACGME designated inst Sponsoring Institution Letter Upload *	l letter from the sponsoring institution. The sponsoring institution letter must ostgraduate dean.
Only one file may be submitted per upload. Please combine multiple files, if needed, to upload.	
+ Select a file	Θ

5. When you are ready to submit, enter the "Date" of submission. This date will help you identify previous submissions in the future.



6. You can either click "Save as Draft" or "Mark Complete."



- "Save Draft" will allow you to continue to edit the reaccreditation application.
- "Mark Complete" will allow you to proceed to submitting your reaccreditation application. *Once* you have submitted your application you will no longer be able to edit it.
- 7. Once you "Mark Complete," you will be taken to a screen to submit your application OR to complete your Fellow Information form if you have not yet completed that. You must click "Submit" to formally submit your reaccreditation application for review, but that cannot occur until AFTER both forms have been submitted.
 - a. Your submission is not complete until you click "Submit."
 - b. Instructions for submitting your application are included later in the document.

To submit your application, you must click "Submit" on the next page once you l clicked "Mark Complete" below.		e	
Save Draft Mark	Comp	plete	Close

Completing the Fellow Information form is described beginning on the next page.

NEW IN 2024 Completing Your Fellow Information Form

- How fellow information is submitted has changed in 2024. In the application form, you indicate the numbers of fellows you wish to enroll, who are enrolled, and who have completed the program. The actual information for these fellows to demonstrate program compliance is submitted in a separate spreadsheet that programs will update and submit each year.
 - As an existing program, you should have received a copy of the form from UCNS staff that you need to update and submit (shown in screen shot below). If you did not receive the spreadsheet, or if you no longer have access to the spreadsheet, contact <u>Amanda Carpenter</u>.

	A	в	с	D	E	F	G	н	1	J	К	L	м	N	0	P	0
1	INSTRU	CTIONS															
2		1. Indic	ate your l	Program Nurr	ber in Row 10 a	nd complete th	ne required Attestation Stater	nent in Row 11 b	y placing an X in the [] at the	beginning of the staten	nent.						
3		2. Provi	de the inf	formation be	low beginning ir	Row 17 for ea	ich fellow enrolled in your pro	ogram.									
4		1	Note: Ear	ch row must (ontain information	tion for only or	ne fellow.										
5		3. If this is the first time you are completing this report, also provide information for all fellow(s) who have completed the program in the last year.															
6		4. As yo	ur fellow	progresses t	hrough the prog	(ram, please up	adate the fellow's information	n.									
7		5. If you	have no	fellows curre	ntly enrolled in y	our program, j	please indicate so in the First	Name cell below									
8	Example	amples are provided in Rows 14 (Enrolled Fellow), 15 (Completed Fellow), and 16 (No Fellow). Only white cells may be edited.															
9									TTA	ESTATION STATEMENT	AND PROGRAM NUMBER						
10	PROG	RAM NU	JMBER:														
	[]lat	test tha	at all fel	lows who a	re enrolled o	r who will en	nroll in this program mee	et the requiren	nents outlined in the Pro	gram Requirement (PR) V.B. Fellow Eligibility	with regard	o medical licensu	re, appropriate res	idency completio	in, and board certific	ation/eligibility or that the
11								program	m will follow the require	ments outlined in Pl	R V.D. Appointment of Fel	lows and Ot	ner Students.				• •
					Fe	llow Contact I	nformation, Licensure, Kesi	dency Training, a	nd Primary Board Certification	on				Fellow Enrollment	Status		
12																	
															If you chose		
							While enrolled in your	Bid the fellow			lf yes, indicate which		lf you chose "Still	lf you chose	"Completed the		Notes
						On wheel	program, does/did the	complete a	If yes, indicate what	While enrolled in	specialty the fellow is	When in the	Completing	"Exited Program	Program [®] in		
						date did this	valid and unrestricted	program	, RCPSC-, or CanERA-	the Fellow board	for certification. If other or	fellow's	Column L, please	Completing" in	indicate the date	For completing	
				Credentials		fellow begin	license to practice	accredited by	accredited residency? F	certified or eligible	more than one, select "Other" or	enrollment	indicate the date	Column L, please	fellowship	fellows, please	
	First	Mid	last	It Uther - make onte in		your fellowship	States or its territories or	ACGME, BCPSC or	"Uther" or "Plore than one residency "select in drandown	ABMS RCPSC or	"More than one PHIMARY certification" select in drandown	status in	the fellow is evnected to	indicate briefly why the fellow evited	program was completed by the	indicate whether the fellow is certified in	
13	Name	Name	Name	Column Q	Email Adress	program?	Canada?	CanERA?	and specify in Column Q.	CFPC?	and specify in Column Q.	program?	graduate.	the program.	fellov.	the subspecialty?	
										Board Centiled/Board							
14	Jane		Sample	MD	janesample@te storonram.edu	7/1/2023	Yes	Yes	Neurology	Eligible for Board Certifienation by ABMS	Neurology	Still Completing Program	6/30/2024				
					oharlesexample					Board Certified/Board							Multiple certifications and
					@testprogram.e			l		Eligible for Board		Completed					residencies completed:
15	Charles Inv 0V		Example	00	du	7/1/2022	Yes	Yes	Internal Medicine	Certifiecation by PCPSC	Internal Medicine	Program			6/30/2023	Yes	Neurology and Internal Medicine
16	23-24																
17																	
18																	

1. Ensure your program number is entered correctly and complete the attestation statement by placing an "X" between the brackets.



PROGRAM NUMBER:

ATTESTATION STATEMENT AND PROGRAM NUMBER

[] I attest that all fellows who are enrolled or who will enroll in this program meet the requirements outlined in the Program Requirement (PR) V.B. Fellow Eligibility with regard to medical licensure, appropriate residency completion, and board certification/eligibility or that the program will follow the requirements outlined in PR V.D. Appointment of Fellows and Other Students.

- 2. Complete the spreadsheet by providing the information requested for each fellow, which includes fellow name, email address, information regarding the fellow's licensure, residency, and board certification, and the fellow's enrollment dates and status of enrollment within the program.
 - a. Review the information provided from your previous submission.
 - i. If any information is missing, please add it
 - b. Update information for fellows listed in the form
 - c. Add fellows newly enrolled in the program
 - d. If there are no fellows enrolled in the program, indicate as such in the spreadsheet
- 3. When the spreadsheet is complete, visit: https://webportalapp.com/sp/login/ucns_application_updates

4. Click "Open" on the Fellow Information line.



- 5. Click "+Select File" to choose the spreadsheet to upload.
 - Only one spreadsheet may be submitted
 - All information regarding your fellows must be included on the spreadsheet that you
 are uploading do NOT submit separate spreadsheets for each fellow or for fellows
 enrolled vs. completing the program

Fellow Information -	Save Draft	Mark Complete	Close
Fellow Information			
For NEW programs:			
 Access and download the Fellow Information template here. Complete the form providing all requested information for currently enrolled fellows and fellows who completed if you have no fellows enrolled, you must complete and upload the form as it will be used in future submissions. Upload the spreadsheet by clicking "Select a File" and click "Mark Complete" to proceed to submit. 	the program in the p	ast Academic Year (A	Y). Even
For EXISTINGprograms:			
March 29-July 31, 2024 UCNS has emailed you the Fellow Information spreadsheet that includes AY 2022-2023 fello	w information that v	vas on file.	
 Review the form. Provide missing information. Update the form as appropriate for your fellow(s) completing and beginning the program or note if no fellows are Upload the spreadsheet by clicking "Select a File" and click "Mark Complete" to proceed to submit. 	enrolled.		
After August 1, 2024 you MUST use your previously submitted spreadsheet. To access your previously submitted sp portal, visit your last submission. Download, update, and save your Fellow Information spreadsheet and then upload "Select a File" and click "Mark Complete" to proceed to submit.	readsheet for updat he updated spreads	ing and uploading to t heet into this portal by	he y clicking
ONLY ONE form should be submitted. All fellow information must be included in one spreadsheet for your program			
Fellow Information Form Upload *			
+ Select a file			

6. Once you have selected your file in the file explorer window, click "Mark Complete."

Fellow Informati	on -	Save Draft	Mark Complete Close
Fellow Informat	tion		
 Access and download the Fe Complete the form providing if you have no fellows enrolle Upload the spreadsheet by of 	ellow Information template here. all requested information for currently enrolled fellows and fellows who ed, you must complete and upload the form as it will be used in future su dicking "Select a File" and click "Mark Complete" to proceed to submit.	completed the program in the pa bmissions.	ist Academic Year (AY). Even
For EXISTINGprograms:			
March 29-July 31, 2024 UCNS ha	as emailed you the Fellow Information spreadsheet that includes AY 202	2-2023 fellow information that wa	as on file.
 Review the form. Provide missing information. Update the form as appropri Upload the spreadsheet I 	ate for your fellow(s) completing and beginning the program or note if no king "Select a File" and click "Mark Complete" to proceed to submit.	fellows are enrolled.	
After August 1, 2024 you MU: portal, visit your last submissio "Select a File" and click "Mark	e your previously submitted spreadsheet. To access your previously su wnload, update, and save your Fellow Information spreadsheet and th lete" to proceed to submit.	ubmitted spreadsheet for updatir en upload the updated spreadsh	ng and uploading to the neet into this portal by clicking
ONLY ONE form should be s	ted. All fellow information must be included in one spreadsheet for yo	ur program.	
Fellow Information Form Uplo			
+ Select a file B Fellow Informa	tion.xlsx 💼		

7. Upon clicking "Mark Complete," the Fellow Information row will now say "Complete." You can access it to review or update the form submitted by clicking "Edit."

TAD1819		
Application Updates When every step in this submission is complete, the "Submit" button to the right will become green and clickable. The submission is not fully submitted until you click the green "Submit" button. Once you click "Submit" the		Submit
submission will no longer be editable. Application Updates NEW The button will update to reflect how you can interact with this step.	C te	
Fellow Information	Complete	Edit

8. You may now either click "Submit" or move to the "Application Updates NEW" row if not already completed.

The next page describes how to Submit the annual report once both components have been completed.

Submitting Your Annual Report

1. Once both sections (Applications Updates NEW and Fellow Information) have been completed, click "Submit."

D1819		
Application Updates		Submit
/hen every step in this submission is complete, the "Submit" button to the right will become gr ickable.	een and	
he submission is not fully submitted until you click the green "Submit" button. Once you click ' ubmission will no longer be editable.	'Submit" the	
Application Updates NEW	Complete	Edit
The button will update to reflect how you can interact with this step.		

2. You will know the annual report has been submitted when the "Submit" button changes from "Submit" to "This has been submitted."



3. Your submission tile will also change to gray and indicate the new status "Under Review."

Accreditation Application Updates			Welcome, acarpenter1207+1811@gmail.c	com 🌣
Please click "+Create a Profile to Get Star You cannot move forward until you have co	r ted'' to begin. You can always edit mpleted your Profile.	your Profile by clicking "Edit".		
Profile				View
To begin, click "+Get Started" below.When If the status bar is gray, your submissi If the status bar is blue, there is an ac If the status bar is red, there is an error	you return to this Homepage, you of on is under review, and no action n- tion required. Click on the Submissi or. Please reach out to the Administr	can see the status of your submission by the eeds to be taken. on Card to complete. rator of this program.	e colored status bar below the submission	n card.
+	Gt 1	GN1811	2021-12-21	
Add Another	Created on 09/2022	Created on 02/09/2022	Created on 01/04/2022	

- 8. You will be contacted after staff has reviewed your annual report with one of the following messages:
 - Your annual report is complete and no additional information is needed at this time.
 - Updates or additional information are needed. The status will change to indicate that action is needed and if this occurs, staff will contact you with instructions for submitting the required information.

Helpful Tips:

A. You may print your submission at any time by clicking the down arrow next to "Application Updates NEW"



- B. The link to access the Program Updates Portal is different than the link used when first completing an application. Please use this link to complete your reaccreditation application: https://webportalapp.com/sp/login/ucns application updates
- C. All programs have **one username and password**, which must be shared by everyone accessing the record. If you create a new login, it will not be linked to your account. If you need to change the username you must contact <u>Amanda Carpenter</u>.
- D. While the annual report will periodically save itself, you are encouraged to save the application often to ensure that you do not lose your work.
- E. Upload fields only accept **one upload** per field. If you have multiple files to upload into an upload section, e.g., faculty CVs, the documents must be combined into one document, i.e., Word or PDF. Zip files **are not** accepted.
- F. How fellow information is submitted has changed in 2024. In the application form, you indicate the numbers of fellows you wish to enroll, enrolled, and who have completed the program. The actual information for these fellows to demonstrate program compliance is submitted in a spreadsheet that programs will update and submit each year.
 - As an existing program, you should have received a copy of the form that you need to update and submit from UCNS staff. If you did not receive the spreadsheet, or if you no longer have access to the spreadsheet, contact <u>Amanda Carpenter</u>.
- G. Only **one spreadsheet** may be submitted. All information must be included on the spreadsheet that you are uploading do NOT submit separate spreadsheets for each fellow or for fellows enrolled vs. completing the program.
- H. Both the "Application Updates NEW" and "Fellow Information" must be completed in order to submit the reaccreditation application.
- Any changes that would normally be submitted in the annual report that included in this year's submission (faculty, program duration, institutions) should be submitted using the program change request process.