

# Curriculum Inventory (CI) Vendor Portal - Instructions for Vendor Users

The purpose of the <u>CI Vendor Portal</u> is to provide vendors with a password-protected view of their medical school clients' progress through the CI data submission process, which occurs annually in August-September. Vendors will be able to see which clients have submitted, and which clients are attempting to submit and having trouble. This will allow vendors to better target customer service support. The CI Vendor Portal provides view-only access to schools' progress, their XML files, and their Verification Reports.

The data below are meant as an example to demonstrate the functions of the CI Vendor Portal; the data is not real.

## 1. Obtain AAMC Account

If you do not already have one, go to <u>AAMC Sign in page</u>, and click "Create AAMC Account." Even if you already have an AAMC account as a school member, it's important to create a new account for your role as a vendor.

Once your AAMC account is created, you AAMC account will need to be maintained (e.g., password kept up to date, email address kept up-to-date, changes in responsibilities, and whether someone still works with your company).

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You may have up to 5 staff members from your team sign-up for AAMC IDs

as vendors, to have access to the CI Vendor Portal. Once your team members have requested their AAMC IDs, please send a list of the staff member's first names, last names, email addresses, and AAMC IDs to <u>ci@aamc.org</u>.

If one of your staff members is no longer part of your team, please notify <u>ci@aamc.org</u> so we can remove them from the CI Vendor Portal.

## 2. Check your list of clients on the Vendor CI Portal

On the CI Vendor Portal, vendors can only see schools who designate you (the vendor) as their official sender of CI data. Schools accomplish this task in the CI School Portal. The CI School Portal can be found on the <u>CI website homepage</u>.

You will see all of your clients listed on the home page (Manage Schools) of the CI Vendor Portal.

If you do not see a school on your CI Vendor Portal that you believe should be listed, please contact your client and ask them to designate you as their CI data sender.

Initially all your clients will be listed as "no response," meaning they have not yet begun the CI submission process but have been invited to participate by AAMC.

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Washington U in St Louis SOM	184	Allopathic	Arizona	USA	No Response	No	No
South Carolina Greenville	850	Allopathic	South Carolina	USA	No Response	No	No

Your client will be listed under one of these categories during the CI submission process.

No response	School has not yet submitted curriculum data
Failed submission	School submitted CI curriculum data that did not meet AAMC business rules.
Successful submission	School submitted CI curriculum data that met MedBiq standards and passed AAMC business rules.
Review in progress	School has started reviewing CI data (i.e., School clicked on review button and data was automatically locked).
Rejected	School has rejected their successful data submission, and therefore may resubmit.
Verified	School has verified their successful data submission.
Unverified	School submitted CI data and verified it but requested that be undone. No additional submission attempts have been made since.
Declined	School has declined to participate in the submission process.

### 3. View each individual client's progress

From your CI Vendor Portal homepage, you can click on each of your clients to see more details. You can see things like the primary school contacts related to the CI, the latest data and Verification Reports after a data upload, and the communications for that school.

Having the latest XML data file and Verification Report available to you will allow you to see the same view your clients are seeing, so that you can better assist them in understanding how your software populates those files. It will also streamline your communications with your clients

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as you will not need to email them asking for them to share those files.

# 4. Review AAMC Business Rule errors for your client(s)

If you look at the "communications" (towards the bottom of the page) for each of your clients, you can see if a client seems to be struggling with multiple submission attempts. You can also see which AAMC Business Rules are generating errors for your clients, and trouble-shoot those for them proactively. If you see AAMC listed in the "communications" log as having downloaded the data or Verification Report, you will know which of your clients AAMC is also lending assistance to.

## 5. Make sure all your clients verify their submissions

Sometimes schools upload CI data, and do not remember that they need to complete the additional step of verifying the data in order for the submission to be counted. You will see which clients have successfully verified their data in the "communications" section of the page. You will also be able to see the final Verification Report in PDF format under "latest report." If a

school verifies their data and then realize they have additional edits to make to their CI data submission (and are still within the dates of the CI season, generally early August through end of September), AAMC can be contacted to "un-verify" the data. The school can then review and verify their data again.

#### 6. Run reports as needed

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Under the tab on the top of the page, you can click on "Reports." Here you can generate an exportable file (in Excel format) for each school category (e.g., review in progress, rejected, etc.). The file download will include your client's specific points of contact (e.g, Curricular Dean) so you can easily get in touch with them to offer assistance.

The CI Vendor Portal provides view access only. The vendor cannot edit the Verification Report or edit school contact information. The purpose of the CI Vendor Portal is not to give vendors edit privileges to school submissions; rather, the purpose is to communicate about school's progress in submitting data to the CI so that vendors can more easily target their support to schools. Again, vendors can only see schools who have chosen to designate a particular vendor as their CI support. If the school does not first grant view access to vendors through the CI School Portal, the school will not appear on the CI Vendor Portal.

If you would like to provide feedback on the CI Vendor Portal or these instructions, please send your ideas to ci@aamc.org.





