AAMC
CURRICULUM INVENTORY

CI Portal User Guide 2020

Association of American Medical Colleges
Background

The AAMC Curriculum Inventory (CI) is designed to serve as the premier benchmarking and reporting tool on content, structure, delivery, and assessment of medical school curricula. The AAMC CI provides participating U.S. and Canadian AAMC-member and AACOM-member institutions with reports that facilitate continuous quality improvement, benchmarking, program evaluation, and accreditation. Schools annually share their local curriculum inventories with the AAMC. To do so, schools may choose to work with an AAMC CI participating vendor on our “Resources for Developers” webpage or use an institutionally developed system. Participating CI vendors and schools with homegrown systems should follow the rules in this document in order to facilitate their CI data upload to the AAMC.

All screenshots and data in this document use test data for the purposes of illustrating the functions of the CI Portal. All data visible in screenshots are test data and should not be treated as real data.

Important dates to add to your calendar

June 1: CI Portal roles must be annually updated by schools and vendors. Instructions on how to do so are found further on in this document.


September 30: CI Portal locks—this is the deadline for CI data upload and verification.
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## CI Portal—roles for schools

In the AAMC CI Portal, schools’ faculty and staff have different privileges related to schools’ CI data files and reports. Schools can manage their school users in the CI Portal Manage Users tab. Roles include:

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
<th>How to set up/edit</th>
<th>Available functions</th>
</tr>
</thead>
</table>
| Curriculum Dean      | A dean-appointed role held by a high-level administrator who is responsible for the curriculum. This individual receives many of the notifications generated during the CI upload and verification processes. | This role is set up by AAMC CI staff—to update or change this role, please email [ci@aamc.org](mailto:ci@aamc.org). | 1. Upload school’s CI data Yes  
2. Download and review school’s CI Verification Report Yes  
3. Reject, if needed, school’s CI Verification Report Yes  
4. Verify school’s CI Verification Report Yes  
5. View school and national curriculum reports Yes  
6. Manage and revoke school users Yes  
7. Assign school’s data sender or vendor Yes |
| CI Primary Administrator | The staff or administrator who is the primary point of contact for the AAMC CI. This person receives all AAMC CI notifications. Schools can designate more than one CI Primary Admin. | This role is set up by the school’s Curriculum Dean and/or other CI Primary Admins in the CI Portal tab Manage Users. | 1. Upload school’s CI data Yes  
2. Download and review school’s CI Verification Report Yes  
3. Reject, if needed, school’s CI Verification Report Yes  
4. Verify school’s CI Verification Report No  
5. View school and national curriculum reports Yes  
6. Manage and revoke school users Yes  
7. Assign school’s data sender or vendor Yes |
| CI Viewer            | School faculty and staff who are kept informed of CI data and reports but do not have edit responsibilities. Schools can assign multiple staff to the CI Viewer role. | This role can be edited by the school’s Curriculum Dean and/or CI Primary Admin in the CI Portal tab Manage Users. | 1. Upload school’s CI data No  
2. Download and review school’s CI Verification Report Yes  
3. Reject, if needed, school’s CI Verification Report No  
4. Verify school’s CI Verification Report No  
5. View school and national curriculum reports Yes  
6. Manage and revoke school users No  
7. Assign school’s data sender or vendor No |
CI Portal—roles for vendors

The AAMC CI Portal is the site in which vendors have view-only access to their clients’ progress in the CI upload and verification process. If a school chooses to work with a vendor for its CI submission, the school must designate that vendor as its CI data sender before view-only access for the vendor is available. Vendors can manage their staffs’ access to the CI Portal in the Manage Users tab. Roles include:

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
<th>How to set up/edit</th>
<th>Available functions</th>
</tr>
</thead>
</table>
| Vendor Super User   | This role has the maximum abilities for a vendor, with the ability to view clients’ progress in the CI upload and verification process and the ability to grant CI Portal access to other staff on the vendor’s team. | This role is set up by AAMC CI staff—to update or change this role, please email ci@aamc.org. | 1. Upload school client’s CI data file | No*  
2. View school client’s CI data file and Activity History | Yes  
3. View school client’s progress in CI upload and verification process | Yes  
4. Edit school client’s CI data file or CI Verification Report | No  
5. Download and review school client’s CI Verification Report | Yes  
6. Grant and revoke CI Portal access as Vendor Users to their staff | Yes  
7. Assign specific vendor staff to specific school clients | Yes  
8. View school clients’ CI submission status reports | Yes  
9. View school and national curriculum reports | No  

| Vendor User         | This role is designated by the vendor company’s primary contact. Vendors may choose to have several staff designated as Vendor Users so that individual staff can be assigned to select school clients. | This role is managed by the vendor’s Vendor Super User in the CI Portal tab Manage Users. | 1. Upload school client’s CI data file | No*  
2. View school client’s CI data file and Activity History | Yes  
3. View school client’s progress in CI upload and verification process | Yes  
4. Edit school client’s CI data file or CI Verification Report | No  
5. Download and review school client’s CI Verification Report | Yes  
6. Grant and revoke CI Portal access as Vendor Users to their staff | No  
7. Assign specific vendor staff to specific school clients | Yes  
8. View school clients’ CI submission status reports | Yes  
9. View school and national curriculum reports | No  

*Vendors cannot upload a school client’s CI data files through the CI Portal; however, vendors can use a Web service to submit CI data files on their school client’s behalf. Please see XML Tools available on the CI website Resources for Developers.
CI Portal—school initial setup

A school’s Curriculum Dean or CI Primary Admin must set up the CI Portal before any CI data file uploads can take place. These roles must be updated annually. Roles can be updated throughout the year, but they should be accurate by June 1 annually to ensure a school’s appropriate faculty and staff receive all relevant messages about the upcoming CI upload beginning August 1. Tasks include:

1. Ensure that the Curriculum Dean and CI Primary Admin(s) are correct (Manage Users).
   a. To update the Curriculum Dean role, email your update request to ci@aamc.org.
   b. The Curriculum Dean, once updated in the CI Portal, can update the CI Primary Admin role.
   c. Once the Curriculum Dean and CI Primary Admin(s) are updated, both roles can grant access to additional CI Primary Admins and CI Viewers.
2. Add and revoke users and their associated roles as needed. It is schools’ responsibility to remove users at their school who should no longer have access to the CI Portal (Manage Users).
3. Determine who will create the CI data file (Manage Sender).
   a. Schools can choose from a list of participating CI vendors posted on Resources for CI Developers, or
   b. Schools can use their own institutionally developed system.
4. Specify how the CI data file will ultimately be uploaded (Manage Sender).

Tutorial videos

While further detailed instructions on each of these set up steps are provided below, please also refer to the following tutorial videos for visual illustration of selective processes in the CI Portal:

- CI Portal: Manage Users tutorial video.
- CI Portal: Manage Senders tutorial video.
- CI Portal: View and Download Submission Errors tutorial video.

CI Portal—editing and managing users for schools and vendors

1. For users with role-management privileges (Curriculum Dean, CI Primary Admin, Super Vendor User), in the CI Portal, navigate to the Manage Users left-hand tab.
2. Select the “Manage Access” button for your institution.
3. Now your left-hand navigation now has four tabs:
a. **Home**—this will take you back to your institution (or list of institutions, if you have more than one).

b. **Users**—this is where you can manage users already in the CI Portal and roles that have already been assigned.

c. **Invitations**—this is where you can grant CI Portal access to a new user.

d. **Back to Application**—this will take you back to the CI Portal.

**Modifying an existing CI Portal user—revoking and granting access**

1. In the **Users** tab, all active role holders will be listed.

2. Select the **Manage** tab for the user you wish to modify.

3. You can choose to “Revoke Access,” which will remove the user’s access to the CI Portal. A user that has been revoked will no longer appear in your institution’s list of users. Please note that if a user is removed from the CI Portal, they do not receive an automatic notification that they have been removed. If you would like them to know that you have removed them from the CI Portal, you would need to contact them directly.

4. You can choose “Grant Role,” which will prompt you to choose what type of CI role you want to grant (e.g., CI Viewer).

5. The individual user’s history of role access will be listed in **User Details** and **Roles**.

**Inviting a user to the CI Portal**

1. In the **Invitations** tab, click on the “Invite User” button.

2. Select the role you wish to grant (e.g., CI Viewer).

3. Write the user’s first name, last name, and email address.

4. Click the “Notify me when redeemed” box to know when the invitation is activated. Un-redeemed invitations will expire after 4 weeks.

5. Click the “Send Invitation” button.

**Notify AAMC CI staff when a role-granting user is added**

All Curriculum Dean and Super Vendor Users will be given role-granting privileges by AAMC CI staff so that Curriculum Deans and Super Vendor Users can add other users to their CI...
Portal. If you add additional users to your CI Portal who need role-granting privileges (e.g., this person needs to be able to grant access to the CI Portal to other users, either a Curriculum Dean and/or CI Primary Admin for schools, or a Vendor User for vendors), please notify the AAMC CI staff by emailing ci@aamc.org, and provide the user’s first name, last name, and email address. AAMC CI staff can then grant the user role-granting privileges.

Managing invitations to the CI Portal
1. Once an invitation is sent, it will appear in the Invitations tab listed as “Active.”
2. You can choose to “Manage” an individual invitation, which will allow you to “Resend” or “Revoke” the invitation.
   a. If details in the original invitation were not accurate (e.g., sent to the wrong email address), you can “Revoke” the invitation and create a new invitation with the correct information.
   b. Revoking an invitation revokes the original access code sent via email to the invited user. If an invited user attempts to redeem a revoked invitation, they will receive an error message that the access code is not valid.
   c. If you select “Resend,” the invitation will resend with the original details (first name, last name, email address) provided.
3. Invitations that are redeemed will appear in your list of invitations sent. No further action is needed to grant access to the CI Portal to the user.
4. Invitations that are revoked will appear in your Invitations list.

For schools to revoke access for a school user
A Curriculum Dean may revoke a CI Primary Admin’s or CI Viewer’s access. The CI Primary Admin may revoke other CI Primary Admins’ or CI Viewers’ access. To revoke a Curriculum Dean user role, please email ci@aamc.org. Revoking a CI role does not impact the AAMC account, only the permissions to the CI Portal for the account.

For vendors to revoke access for a Vendor User
A Vendor Super User may revoke a Vendor User’s access. A Vendor User may revoke other Vendor Users’ access. To revoke a Vendor Super User, please email ci@aamc.org. Revoking a CI role does not impact the AAMC account, only the permissions to the CI Portal for the account.

To edit the name or email address of an AAMC account
Once signed into an AAMC webpage/application (e.g., the CI Portal, the CI home page: www.aamc.org/cir, other AAMC pages/products beyond the CI, etc.), you can navigate to the upper right-hand corner. Then click your name and select “My Account” from the drop-down menu. There, you can edit some user account details and click “Save,” or select “Need help?” for further assistance.
**CI Portal user accounts expire 15 months from their creation date**

The technical program the AAMC now uses to manage its users is the User Management Tool (UMT). Users familiar with the previous CI Portal user management system may notice that now, when you use the CI Portal to manage users, you are taken to another application, the UMT application. This UMT application is used across several AAMC products, so when modifying your users, please be sure you click on their designated CI roles, and not on roles associated with other AAMC programs or products.

As part of this UMT program to manage users, all CI user roles expire 15 months from their creation date. It does not matter how much or how often the role is used; the role will still expire in 15 months. Curriculum Deans, CI Primary Admins, and Super Vendor Users (those with role-granting privileges) can see which of your users have expired and need a new invitation to be granted access by:

1. Go to the **Manage Users** tab,
2. Click on “Manage Access” for your institution,
3. Click “Manage” on an individual user.

There you can see the expiration dates. AAMC CI staff will annually prompt users that accounts need to be managed and renewed.

**CI Portal—vendor point of contact per school client**

**Vendors assign a primary contact per school client**

Either Vendor Super Users or Vendor Users can assign a primary point of contact from their staff to individual school clients. Vendors should discuss internally with their staff what approach they would like to use in order to assign primary points of contact per school clients (e.g., vendor staff member 1 is assigned all clients in the Midwest, etc.).

Before beginning this step, Vendor Super Users should ensure that all their relevant staff have been invited to the CI Portal and have redeemed their invitations (see section CI Portal—editing and managing users for schools and vendors, above, for further details).

1. From the **Manage Schools** tab in the left-hand navigation bar, the Vendor Super User and/or Vendor Users select a school client by clicking on the school name.
2. At the top of the screen, the Vendor Super User and/or Vendor Users select an individual staff member to assign to this school. All vendor staff members who have been invited and who have activated their invitations to the CI Portal, including the Vendor Super User, will be listed and available to select as the primary point of contact.
3. Once the Vendor Super User and/or Vendor Users designate a vendor staff member to be the primary point of contact for a given school, the school client will see the vendor staff...
member’s name and email address in its Manage Sender tab in the CI Portal, with a “Yes” for that person in the Primary Contact column. If the vendor does not select a primary point of contact for a given school client, all the vendor staff members will be listed for the school client in the Manage Sender tab, with a “No” listed for each vendor staff member in the Primary Contact column.

CI Portal—schools managing their data sender

Manage sender
As a Curriculum Dean or CI Primary Admin, it is your responsibility to determine who will create the CI data file and who will ultimately upload the file to the CI Portal.

How will you create your curriculum data file?
Your institution can hire a third-party vendor to create your file or you can develop it in-house. A list of participating third-party vendors can be found on the CI website Resources for CI Developers link. Regardless of which option you choose, your school must update the Manage Sender options in the CI Portal to record your choice.

To record who will create your curriculum data file
1. In the CI Portal, navigate to the Manage Sender tab.
2. Under “How will you create your curriculum data file?”, select:
   a. “A system developed at my school will create the file,” or
   b. “A vendor curriculum management system will create my curriculum data file.”
   i. If this option is chosen, use the Vendor Name drop-down list to select your vendor.
3. Click “Save.”
4. The Vendor Contact Information on the CI Portal Upload tab will be updated to reflect any points of contact your selected vendor may have provided.

Note: If your curriculum management system vendor does not appear in the drop-down list, contact ci@aamc.org.

How will you upload your curriculum data file?
A third-party vendor or your school’s Curriculum Dean or CI Primary Administrator(s) can upload your CI data file. It may be helpful for schools to include a medical school staff member familiar with XML development, especially if choosing to upload the CI data file without the assistance of either in-house or vendor IT support.

If a system at your school is developing the CI data file, you may choose to upload the data file.
through the CI Portal in the Upload tab on your left-hand navigation bar. Alternatively, schools or vendors who create the CI data file may choose to upload the file through a Web service.

Regardless of which option you choose, your school must update Manage Sender options in the CI Portal to record how you will upload your curriculum data file.

To record how you will upload your curriculum data file
1. Navigate to the Manage Sender tab.
2. Under “How will you submit your curriculum data file?”, select:
   a. “A system developed at my school will upload the file,” or
   b. “My vendor will upload my file for me,” or
   c. “I will upload a file generated by my school or vendor curriculum management system.”
3. Click “Save.”

If you have an XML CI data file that you wish to upload yourself through the CI Portal, you must choose the option for “I will upload a file generated by my school or vendor curriculum management system.” If you choose either of the other options (“A system developed at my school” or “My vendor will upload my file for me”), you will not have an “Upload Data” button on the CI Portal. Once you select the “I will upload a file generated by my school or vendor” option, an “Upload Data” button will then be available on the CI Portal Upload tab.

View-only access to school’s CI data information for vendors
If a school selects a vendor in the Manage Sender tab, this will allow the designated vendor to have view-only access to the school’s CI data file and Verification Report. If a school does not designate a vendor in the Manage Sender tab, the vendor will not have view-only access to the school’s CI information.

Vendor support to schools in CI upload process through the CI Portal

Vendor ability to see school client’s CI data information
If a school selects a vendor in its Manage Sender tab, a vendor can view:

- School’s CI XML data file.
- School’s CI Verification Report.
- School’s Activity History.
A school’s Activity History logs each action taken by the school, or on behalf of the school (e.g., by AAMC staff), throughout the CI upload process. The types of information captured in the Activity History include:

- Automatic emails sent.
- AAMC Business Rule errors.
- Progress in the CI upload process (e.g., progressed to the “Verified” stage).
- Download of CI Verification Report.
- Etc.

As a school uses the CI Portal, vendors receive an email notification (which is logged in the school’s Activity History as “Notice to vendor”) when a given school client is active in the CI Portal and may need assistance.

If a vendor cannot view a school client they expected to see, it is likely because the school has not designated a given vendor as its data sender in its Manage Sender tab. Vendors should reach out to their clients and ask them to designate them as their data sender in order to have view-only access to a given school client.

**Vendor IP address for use with a Web service**

When onboarding as CI participating vendors, vendors are asked to provide an IP address (or IP address range) in order to have that IP address or range white-listed with the AAMC. This allows vendors to upload school clients’ CI data through a Web service. Vendors should annually confirm by June 1 that their IP address (or range) is still accurately documented with the AAMC. The Web service allows users, whether schools or vendors, to upload CI data to the AAMC outside of the CI Portal.

**CI Portal data upload and verification—stages in the submission process**

Each year, schools are asked to upload curriculum data from the most recently completed academic year. For example, for the 2020 upload, schools provided data from the 2019-2020 academic year.

The CI Portal ([https://apps.aamc.org/ci-web/](https://apps.aamc.org/ci-web/)) tracks your upload status in the CI Portal Upload tab, with a progress bar that will show a particular school’s current status in the upload and verification process.

**No Response status**

The system will display a No Response status until data are uploaded for a given school.
Data Uploaded status
Once a CI data file has been successfully uploaded, the status indicator will move to Data Uploaded. While in this status, you may:

1. Access the CI data file,
2. Upload a new CI data file, or
3. Download the CI Verification Report.
   a. If you download the Verification Report by clicking on the PDF hyperlink, you will simply access the PDF and remain in Data Uploaded status.
   b. If you download the Verification Report by clicking on the “Review Report” button, you will access the PDF and enter Under Review status. Once your school is in Under Review status, users cannot upload a new CI data file until the Verification Report is either verified or rejected.

If you would like to read your Verification Report without having to potentially verify or reject it, please choose option 3a above—download the Verification Report by clicking on the PDF hyperlink. As an example, a CI Primary Admin might prefer to read their Verification Report without entering Under Review status to avoid their Curriculum Dean receiving email notifications when the CI data file is rejected, especially if the CI Primary Admin anticipates needing to complete this review, reject, upload process more than once.

This safety feature, not allowing additional CI data files to be uploaded while a school is in Under Review status, is in place to prevent users at a school from accidentally overwriting a Verification Report that another user at their school is trying to review.

Note: The CI Verification Report must be verified by the school’s Curriculum Dean by September 30.

Under Review status
Once your school has downloaded the Verification Report with the “Review Report” button, the status indicator will be moved to Under Review. From this tab, you must either:

1. Have the Curriculum Dean verify the Verification Report, or
2. Have the Curriculum Dean or CI Primary Admin reject the Verification Report.

Note: If the Verification Report is rejected, your school’s status will return to the No Response status. You will need to work with your developer or vendor to update your data in your curriculum management system, create a CI data file, and upload again.

Verified status
Once the Curriculum Dean has verified the report, your school will be moved to Verified status.

This is the final step required for a school to complete its participation in the annual AAMC CI upload process.
CI Portal—how to upload a CI data file

Upload the CI file

1. Navigate to the **Upload** tab.
   a. Click “Upload Data.”
   b. Click “Browse” and specify the location of your prepared CI file.
   c. Click “Upload Data.”
   d. Click “Close.”

Possible errors

Upon upload, the CI Primary Admin will be notified via email if your CI data file contains any errors. If you encounter an error, update your file and resubmit as needed. For a full listing of error codes and their meanings, reference the [AAMC Business Rules](#).

CI Portal email notifications

All email notifications are logged in the CI Portal in the school’s Activity History panel on the **Upload** tab.

1. You may access email notifications within the CI Portal by clicking the activity title in the Activity History window, which is located on the **Upload** tab.
2. By clicking an activity title, a pop-up window containing the complete text of the email notification will be displayed.

<table>
<thead>
<tr>
<th>Action that triggers an email notification</th>
<th>Curriculum Dean</th>
<th>CI Primary Admin</th>
<th>CI Viewer</th>
</tr>
</thead>
<tbody>
<tr>
<td>CI Portal open and close notifications</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Upload CI data file</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>AAMC Business Rule error</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Regular reminders</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Verification Report available</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Verification Report is in Under Review status</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Verification Report rejected</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Verification Report verified by Curriculum Dean</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Please note that the above table encompasses many but not all email message notifications related to the AAMC CI. If a given school does not have a CI Primary Admin identified, automatic email messages will then go to the Curriculum Dean.

CI Staging
CI Staging differences from the CI Portal

As described above in this document, the CI Portal is the site where schools annually upload and verify their CI data with the AAMC. Prior to the upload season, which occurs during August-September each year, schools may test-upload through CI Staging: https://apps.staging.aamc.org/ci-web

CI Staging can be thought of as a sandbox or playground to ensure that curriculum inventory documentation practices will lead to a useful Verification Report. Schools may, for example, upload one course at a time, rather than their entire curriculum inventory (as long as each piece of the curriculum is meeting the specifications and business rules), so that they can adjust their curriculum documentation practices as needed. More information on CI specifications and business rules are posted on Resources for CI Developers.

You can also read more about how the CI Portal and CI Staging environments differ in the CI Portal Help section in the left-hand navigation, under “CI Platform Information.”

The CI Portal and CI Staging are independent from each other. Things that you do in CI Staging will have no effect on the CI Portal. For example,

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>If I add a new user to our school’s CI Staging site, will they also have access to the CI Portal?</td>
<td>No. Users in the CI Staging site do not automatically have access to the CI Portal, and vice-versa. Users need to be added separately to CI Staging and the CI Portal.</td>
</tr>
<tr>
<td>If I upload a CI data file in CI Staging, will it appear in the CI Portal?</td>
<td>No. CI data files uploaded in CI Staging do not automatically become uploaded in the CI Portal.</td>
</tr>
<tr>
<td>If I designate myself as the CI data file creator and sender in the Manage Sender tab in CI Staging, will it automatically update my CI data file sender in the CI Portal’s Manage Sender tab?</td>
<td>No. The Manage Sender tab on CI Staging is independent from the Manage Sender tab in the CI Portal. You could potentially designate one method in the CI Portal (e.g., a vendor), and a different method in CI Staging (e.g., yourself).</td>
</tr>
</tbody>
</table>

It may therefore feel as though you are repeating some of the same steps in both the CI Portal and CI Staging. This division is designed purposefully so that schools and vendors may experiment and test approaches to curriculum documentation in CI Staging.

Another key difference between the CI Portal and CI Staging is that there are no automatic email notifications sent from CI Staging. Actions that would normally trigger an automatic email notification in the CI Portal, like uploading a new CI data file, do not trigger notifications in CI Staging. This is a deliberate design choice so that users can experiment with CI data as much as they like without concern about flooding their colleagues’ inboxes. Although no automatic email notifications are sent from CI Staging, a school’s Activity History panel on the Upload tab will still show all the actions a school takes in CI Staging (e.g., upload a CI data file), as they appear in the CI Portal.
CI Staging account for schools

Please email ci@aamc.org if your school would like access to CI Staging. In your message, please include:

- First name of staff/faculty member to be granted a CI Primary Admin role in CI Staging.
- Last name of staff/faculty member to be granted a CI Primary Admin role in CI Staging.
- Title of staff/faculty member to be granted a CI Primary Admin role in CI Staging.
- Email address of staff/faculty member.

Also copy the Curriculum Dean in your email, for confirmation that your curriculum office is aware this individual is asking for access to the school's CI Staging site.

The AAMC will then grant access to the individual. This individual will now be the point of contact for the school’s CI Staging site and usage, and can grant access to CI Staging to other faculty/staff at their institution as they see fit, utilizing the instructions above in this document for granting roles and the CI data upload process.

Schools are encouraged to test in CI Staging the same process they intend to use in the CI Portal at least once. For example, if a school would typically have a vendor create its CI data file, the school is encouraged to grant access to CI Staging to that vendor and/or IT staff as well.

Please note that accounts created in CI Staging are separate from AAMC accounts in the CI Portal (different usernames, passwords, etc.). Like CI Portal account roles, CI Staging account roles (e.g., CI Viewer) expire 15 months from their creation and therefore need to be renewed. The process for granting/renewing/revoking roles in CI Staging is the same as the process in the CI Portal.

In the CI Portal, the Curriculum Dean is the only person who can verify a Verification Report, so CI data is officially submitted to AAMC. Because CI Staging is not used for verifying the Verification Report (i.e., submitting CI data to AAMC), CI Staging is only used for testing, we do not provide Curriculum Dean roles in CI Staging. Instead, CI Staging users are provided with a CI Primary Admin role. A school does not need a Curriculum Dean role in CI Staging because schools do not use CI Staging to verify their Verification Reports. The CI Primary Admin role has all the necessary privileges to be able to upload a CI data file and review the Verification Report.

CI Staging account for vendors

For vendors interested in testing data in CI Staging on behalf of a school client, please reach out to your client and ask them to grant access to a Vendor User, as described above in CI Staging account for schools.

The AAMC strongly recommends that vendors test school data in CI Staging at the beginning of the academic year, as well as throughout the year, to ensure that curriculum mapping documentation through their software will:
• Meet the CI technical specifications and AAMC Business Rules (see Resources for CI Developers for further details.)
• Populate the CI Verification Report as desired.

A sample set of steps for vendors might be:

1. Gain access to CI Staging for a given school client.
2. Begin testing portions of the curriculum (e.g., individual courses) in CI Staging.
3. Confirm with school client that CI data are populating the CI Verification Report as desired.
4. Bring potential agenda items for discussion to AAMC CI staff, and book one-on-one appointments as needed.
5. Keep adding curriculum data in CI Staging, continuing to confirm that the population of the CI Verification Report is as desired by the school and is as accurate and complete as possible for the AAMC.

For additional assistance

If you have questions or suggestions about the CI Portal User Guide contents, or need additional assistance, please reach out to ci@aamc.org.