New Innovations (RMS) Portfolio FAQs

MMCGME

Metro MN Council on Graduate Medical Education

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Portfolio Reviews FAQ's

FAQ: I've created a Review template and assigned it to a resident. How do I get the results to be generated overnight?

Follow the steps below to have an assigned Portfolio Review generate results overnight:
1. Go to *Portfolio > Manage Reviews*
2. Click **View** in front of the review you want to generate
3. Click **Schedule Data Capture**

FAQ- Why aren't my residents' procedures showing up in their portfolio reviews?

In order for there to be any procedures showing on the Semi-Annual Review, each of the procedure names must have a target established.

To check:
- Go to *Logger>Setup > Lists and Fields*
- Click the tab labeled **Procedures**
- Click **Edit** next to one of the procedures to make sure that targets have been established

FAQ - Why don't my resident's milestone scores show up in their portfolio reviews in the milestone widget?

Likely this has to do with the dates of your portfolio review compared to the date of the milestone review.

Milestone scores will only show up if the date of the milestone review falls within the dates of the portfolio review. For instance, if your portfolio review dates are July 1st thru September 30th, no milestone scores would show up because neither June nor December (the dates of the milestone reviews) falls within July thru September.

Note: Sometimes the browser you use causes milestone graph to display incorrectly. Try changing browsers to correct the display.

FAQ - Why aren't there results for my residents under the Competency by Rotation widget?

The Competency by Rotation widget has several parameters that must be met in order for data to pull into the widget.

- This widget only pulls data from traditional evaluation forms. It does not include information from evaluation forms which use subcompetencies, milestones, EPAs, or custom subcompetencies.
- Primary rotations will be listed as they appear in the evaluation match (results from evaluation matches with unspecified rotations will not display on this widget)
- Evaluation results will be displayed if:
   - The primary rotation end date on the block schedule falls within the configured review time period, and
   - The match's end date falls within the scheduled rotation
- Evaluation results are included only for Rating scale responses to evaluation questions that have been attached to a category(tag) that is associated with a core competency

FAQ - Why is some of the text in blue and some in black when using the "Evaluations Comments-All" widget?

The blue text denotes the text of the question, while the black text denotes the actual comments made.

FAQ - Why is there no data for my residents when I create a portfolio review for them?

Make sure that you have selected the desired widgets to collect the data for each of your residents and that the data to be collected fits the criteria for each.

FAQ - Are all evaluation comments included when using the "Evaluation Comments-All" widget?

No, the following comments are **not** included:

- Comments from evaluations that are on hold
- Comments associated with questions that are from EPA's, Subcompetencies, Custom Subcompetencies, or Milestones (general comments from evaluations with these types of questions will appear, however)
- Comments from evaluations initiated from other departments (this is a default setting but if you wish to include these, you can customize this widget to include them)

The date of the match can also exclude comments. By default, matches with end dates that fall within the review dates will appear. You can customize the widget to change it from the review period to the resident's overall residency dates. You can also customize this widget to only include comments that were physically completed during either the review period or residency period.

FAQ - Why are all test scores for my residents showing up on their portfolio review?

By default, any test scores that were recorded for a resident in their demographic record will be included, as long as it was taken during their residency period. You can filter the list of types to be included, however, you cannot filter to only include them for a designated date range.

To filter the types of scores included, customize the Test Scores widget and check the box that reads "Filter Test Score Types". Click on the types to be included and click **OK.**

FAQ - Is there a way to permit other people to sign a Portfolio review?

For a **Semi-annual** portfolio review, by default the only signatories are:
- The person who is designated as the subject's program director in the program demographics table.(Administration>Program>Personnel)
- The subject's advisor as designated in the subject's demographic record (Personnel>Personnel Data>Basic Information)

For an **Advisor** portfolio review, by default the only signatory is
- The subject's advisor as designated in the subject's demographic record (Personnel>Personnel Data>Basic Information)

Changes to signatures after reviews have been created, can be done in a few ways:
- Delete the reviews already created
- Edit the form used to create the reviews
- Re-create the reviews using the edited form

<div align="center">or</div>

- Edit the form for each review

Other people can be given permission to have full access or to simply view portfolio reviews as well as provide comments but they cannot sign the reviews. These include any person designated as an Associate Program Director of the subject (Administration>Program>Personnel) or members designated as part of a review team:

FAQ- Why didn't my program director receive a notification that reviews are ready after I manually captured the review data?

Notifications to signatories are designed to be sent only after the system automatically captures data based upon either a meeting date (captured 7 days prior) or based upon the review period (the evening of the last day of the review period).

Manual capture is chiefly designed to recapture data after changes and settings have been made that will alter results, so it was not designed to notify signatories. If you want the system to send auto notifications it is best to set the meeting date for 8 days from the current date so that an auto capture will occur seven days prior to that date. When the auto capture occurs, the signatories will also receive notification in their consolidated email that same day.

FAQ: Is there a way to prevent a resident from seeing their portfolio review?

No, there is not a way to do this. Once a review is created, it can be seen by the resident. Locking it only prevents the widget data from being captured.

Keep in mind however, that you can modify the default subject view access from including data captured, comments and performance indicators to only seeing data captured. Here is how you can see this setting and make changes if desired:

1. Go to **Portfolio** > **Reviews**
2. Click **View** to the left of the person's review
3. Click **Form Settings**
4. Under Access, click **Set Permissions**
5. Select View Access without Sensitive Information
6. Click **Save**

FAQ - How will a program director know if they have portfolio reviews to complete?

In the Notifications section of your PD's home page, there's a section labeled "PORTFOLIO". Notifications appear for upcoming meeting dates or review periods or for reviews with required signatures.
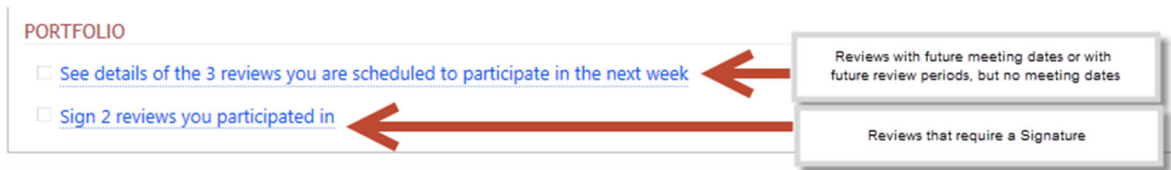
Scholarly Activity FAQ's

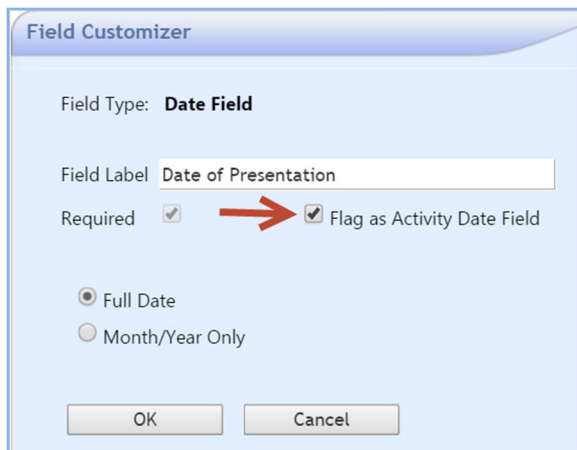## FAQ: My faculty are not appearing on the ADS report. What's wrong?

If your faculty are not appearing on your ADS report, and they have entered Scholarly Activities, be sure you have designated your Core Faculty in the Program information pages.

1. Go to *Administration > Program > Personnel*
2. Click the **Faculty** tab
3. Click **Designate Faculty**
4. Select a faculty member from the list
5. Enter their appointment date
6. Check the box for Core Faculty
7. Click **Add Faculty**

FAQ: What is an 'Activity' and 'Date' Identifier?

Activity Description and Activity Date (date the scholarly activity is logged) fields are the defaults that are used to sort entries when Activities are viewed and reports are generated. However, you can change the field for Activity and Date identifier to whatever you prefer rather than using the default.

Some programs would rather see a different date on reports instead of the logged (activity) date. For instance, the date of the presentation. In that case, select one of the date fields, name it Presentation Date and make it the Activity Date. All reports will show the presentation date instead of the date logged.

Fields that can be used as the **Activity Date** field:

- Activity Date {date field}
- Date {date field}
- Date

Fields that can be used as the **Activity Description** field:

- Activity Description {Single Line Text}

- Authors {Single Line Text}
- Book Title {single line text}
- City {single line text}
- Editors
- Grant Title
- Granting Organization
- Investigators
- Issue
- Journal
- Meeting Sponsor
- Page Number
- Presenter
- Publisher
- Text Box
- Title of Abstract
- Title of Article
- Title of Chapter
- Title of Presentation
- Volume

FAQ: Why are some of the scholarly activities not appearing on the ADS Report?

If the scholarly activities are not appearing on the ADS Report, check to be sure that your Scholarly Activity forms have been linked with one of the ADS categories. Refer to this Quick Start Guide to add a category to an existing form.

## FAQ: Why is my name on one of the resident's entries?

If you log a Scholarly Activity on behalf of the resident, your name is recorded, not the resident's.
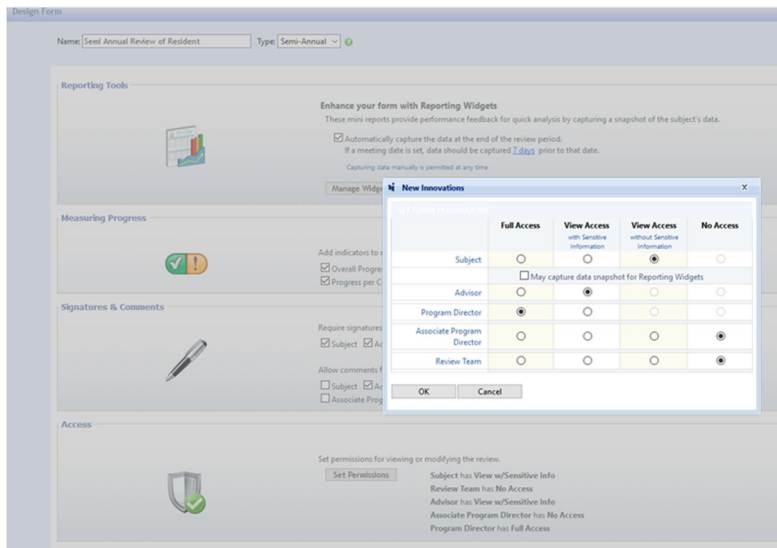
FAQ: What do the Scholarly Activity fields look like to the person who completes it?

There is a Preview button on the page where you build the form. Just add the fields you want and click on preview to see what the resident or faculty see when they open the form.
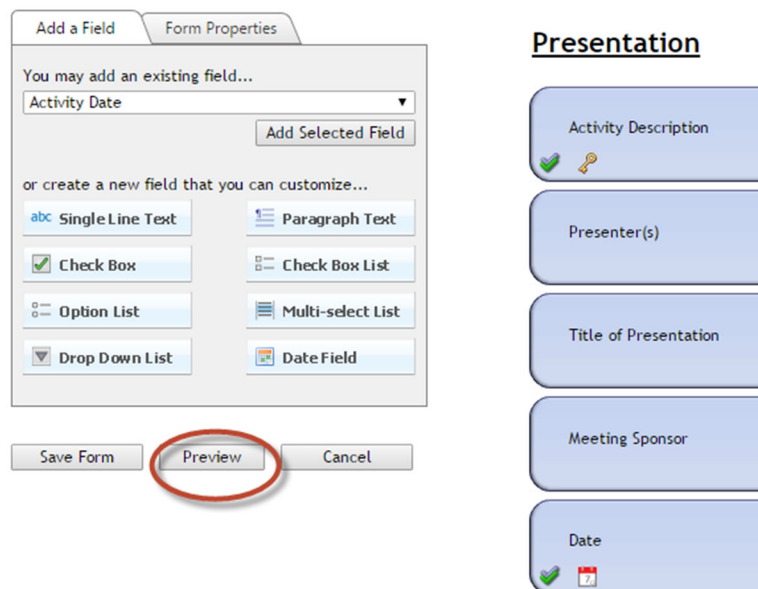
FAQ: I need to edit to a form. Can I do that?

No. Once a form is in use it cannot be edited. However, a form can be copied and the edits made to the copy. The old form can be archived so it is not available to the residents or faculty.

However, ADS categories can be added at any time and will show up retroactively on reports.

FAQ: What is a 'contributor' in Scholarly Activities?

A contributor is a person who will assist or guide a resident on a scholarly activity. They can view the details of the entry. When the resident logs the activity, they designate the person to act as a contributor. An email is sent to the contributor and a link is placed in the Notifications panel of their home page
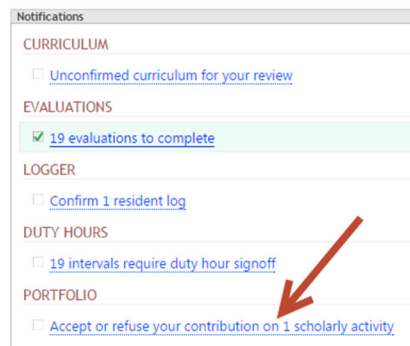
Click the link to accept or refuse the invitation to be a contributor.

FAQ: Can a person from another department access my forms?

Only people whose personnel profile is in your department can access your Scholarly Activity forms. People from outside departments cannot use your forms.