New Innovations Portfolio Review Module Training

MMCGME

Metro MN Council on Graduate Medical Education

Revised 4/2017

TABLE OF CONTENTS

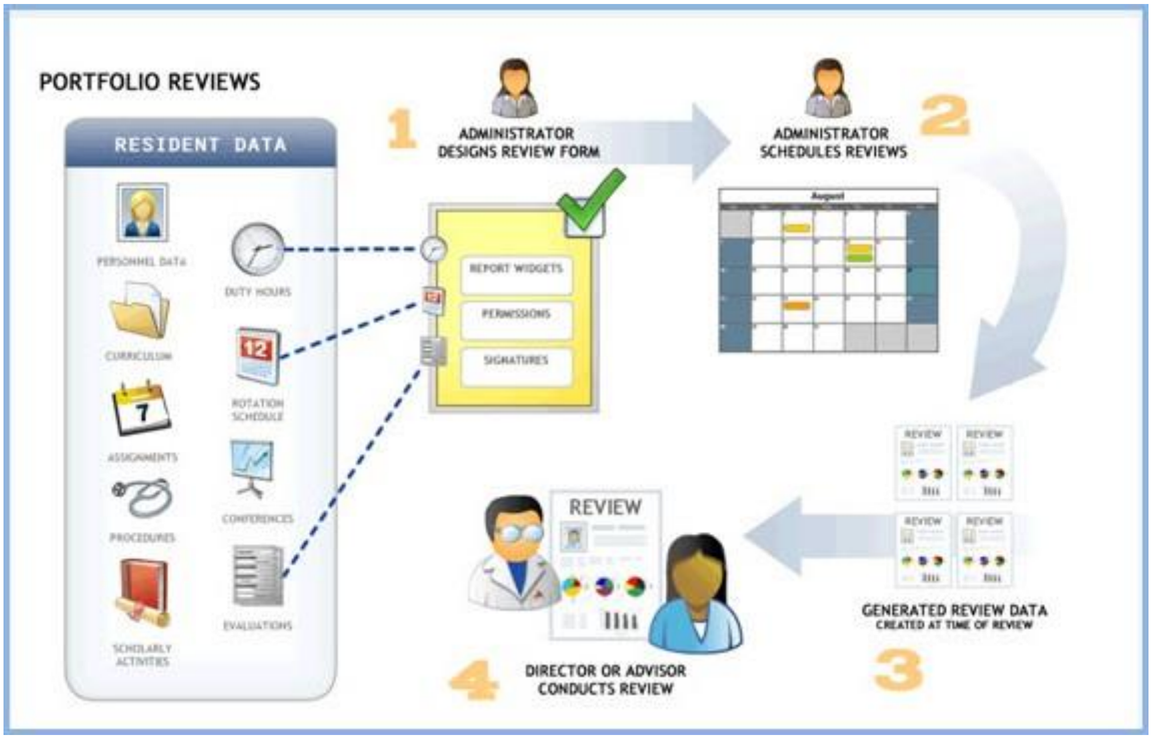
PORTFOLIO REVIEWS - OVERVIEW

DESCRIPTION

The Portfolio module is an application that is designed to contain and organize evidence of learning. It can also show that residents and fellows are working towards goals and objectives set by their programs. Program administrators can configure the module to capture the information pertinent to their programs.

The Portfolio Reviews feature is a centralized reporting tool used to gather resident performance data from many areas of the software. Portfolio Reviews were designed to facilitate semi-annual Program Director reviews and quarterly Advisor Reviews of resident and fellow performance. It offers customized performance feedback and centralized Portfolio Review Management. Some of the reporting areas include Evaluations, Milestones, Procedure Logger, Schedules, Personnel, Curriculum, Duty Hours, Conferences and Scholarly Activities. Only people with the work role of Resident can be scheduled for a Portfolio Review and the reviews only pull data for the resident's current program.

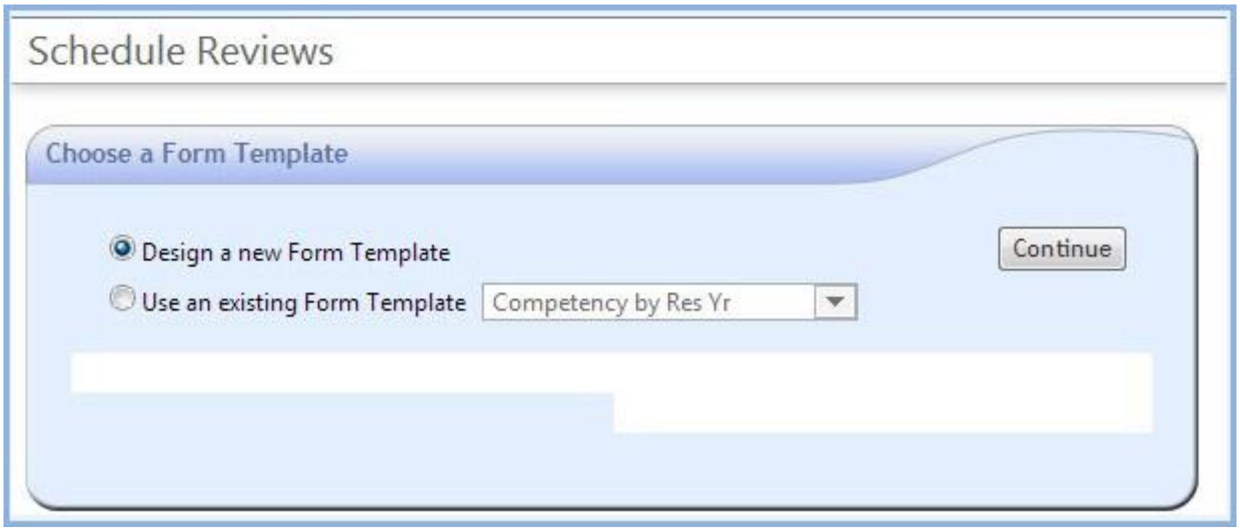
THE REVIEW PROCESS



REVIEWS - CREATE FORM TEMPLATE

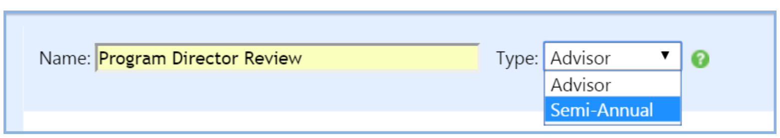
CREATE TEMPLATE

1. Go to *Portfolio* > *Reviews*
2. Click **New**
3. Select one of the following:
    - Design a new Form Template
    - Use an existing Form Template. Select the template from the drop-down list.
4. Click **Continue**



DESIGN FORM

1. Enter a descriptive name for the form template
2. Select the type of review - Advisor or Semi-Annual.



REPORTING TOOLS

1. Click on the **7 day(s)** link to select the number of days **prior** to the review that the data should be gathered.

2. Click on the **Manage Widgets** button to select the data that will be presented during the review

REPORTING WIDGETS

Select the reporting widgets to add resident data to the template.

1. Move your cursor over any report widget to show the **Add Widget** button.

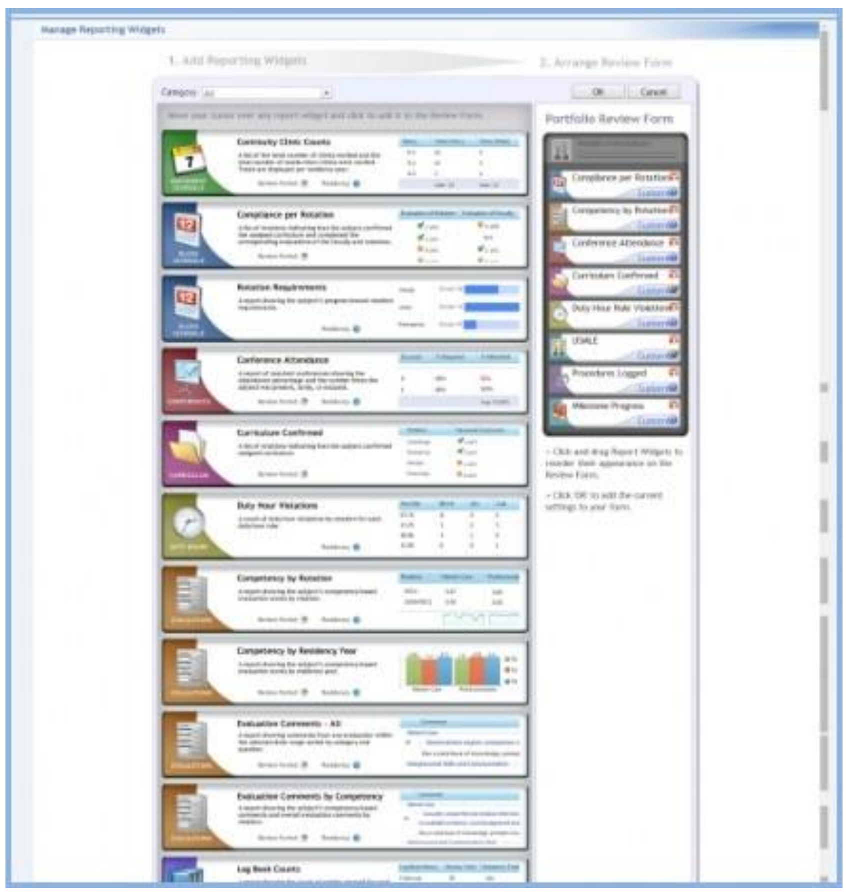
2. Click **Add Widget** to move them to the right side of the page and include them on the form

3. Click and drag Widgets on the right side to reorder them in the list

4. Customize Widgets by clicking the Customize icon. For example, on the Duty Hour Violations widget, customize it to see only AOA or ACGME programs.

5. Click the Delete icon to remove a Widget from the list.

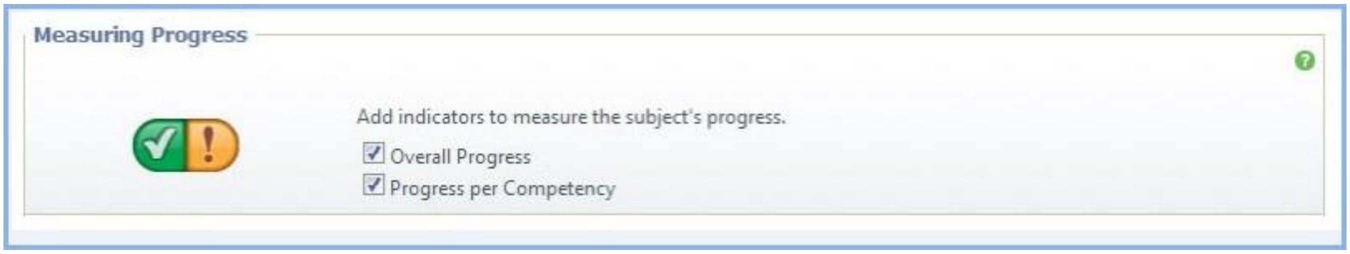
6. Click **OK** to when all Widgets have been selected



MEASURING PROGRESS

1. Check Overall Progress to provide one indicator of general progress

2. Check Progress per Competency to provide an indicator of each Core Competency

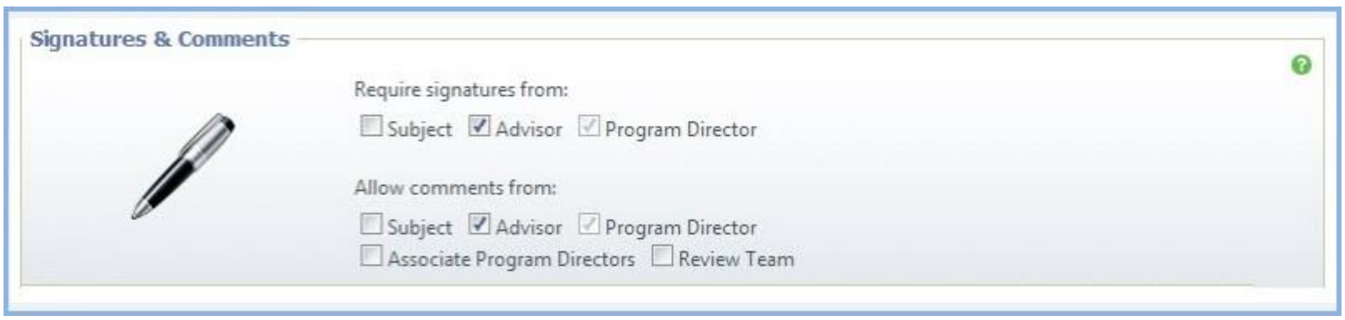


SIGNATURES AND COMMENTS

1. Select who should sign the form. Advisor is automatically selected if the form type is Advisor. Program Director is automatically selected if the form type is Semi-Annual.

2. Select who should be permitted to enter comments. Advisor is automatically selected if the form type is Advisor. Program Director is automatically selected if the form type is Semi-Annual

Note: Signatures cannot be deleted once checked by the reviewer or subject. Please contact New Innovations for assistance.



ACCESS

1. Click **Set Permissions** to determine what is viewable by participants in the review.

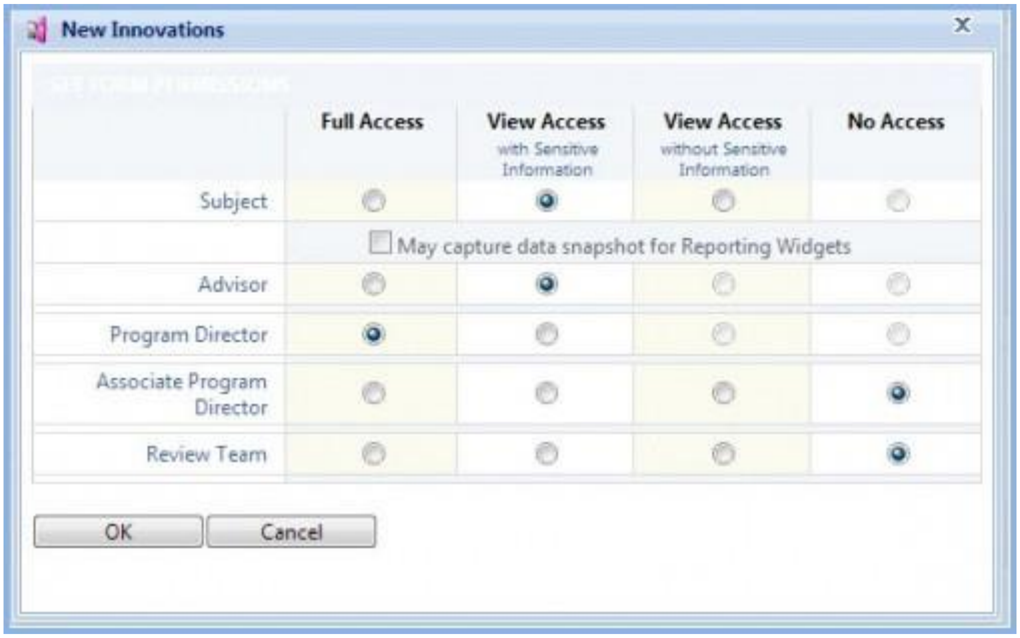
2. Hover over the column label to see the access description

3. Make selections.

4. Click **OK** to save Permissions

5. Click **Preview Layou**t to see how the form will look

6. Click **Save** to save the form



Note: If a Subject is given the ability to sign the review or make comments, they must be given access to all sensitive information (progress indicators and comments) so that they fully know what they are signing.

REVIEWS - CREATE REVIEW TEAM

OVERVIEW

Some institutions conduct Semi-Annual Resident Reviews using a review team rather than designating an individual to conduct the resident's review. If this is the case in your institution, you can configure a review team in the Portfolio Reviews feature.

Review teams can then be given full access to reviews. This will permit all members of the team to view the completed review form. They also may generate data and schedule review meetings.

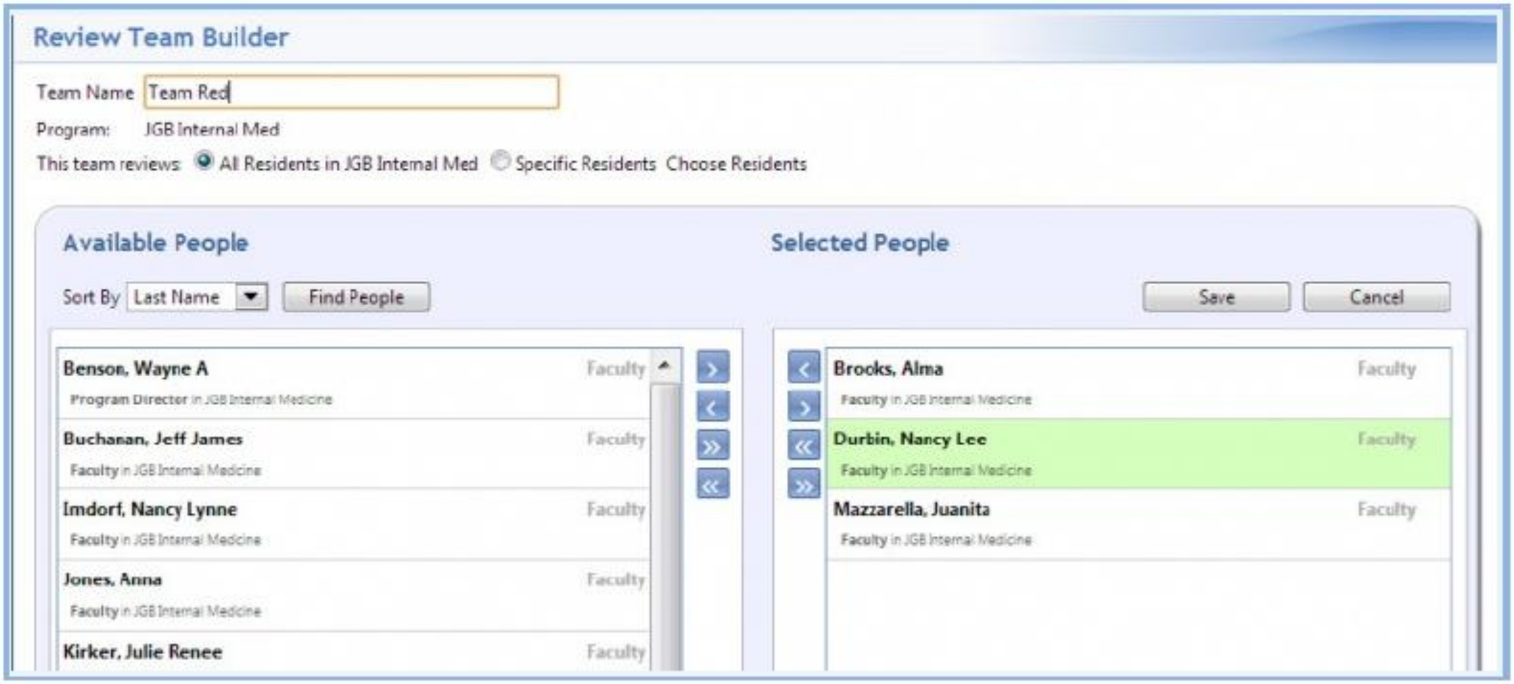
Teams can also be created with designated access to reviews for a subset of residents. This may be beneficial for large core programs where trainees work with a large number of faculty members.

By default, review teams cannot enter comments, however, this can be enabled in the Signatures and Comments settings for the form.

Review team members can be people from any department. However, we recommend that you only include people on the review team who ***do not*** currently have the role of Program Director, Associate Program Director, or Advisor, as these participants can already be included in reviews dynamically.

CREATE A REVIEW TEAM

1. Go to *Portfolio* > *Teams*
2. Click **New**
3. Enter a Team Name
4. Choose one of the following:
    1. All Residents in (program name)
    2. Specific Residents - If this selection is chosen, click **Choose Residents**. Move the designated residents to the right panel and click **OK**.
5. Move your Team Members to the right panel
6. Click **Save**


Review Team Builder
Team Name
Team Red
Program:
JGB Internal Med
This team reviews:
All Residents in JGB Internal Med
Specific Residents
Choose Residents
Available People
Selected People
Sort By
Last Name
Find People
Save
Cancel
Benson, Wayne A
Faculty
Program Director in JGB Internal Medicine
Buchanan, Jeff James
Faculty
Faculty in JGB Internal Medicine
Imdorf, Nancy Lynne
Faculty
Faculty in JGB Internal Medicine
Jones, Anna
Faculty
Faculty in JGB Internal Medicine
Kirker, Julie Renee
Faculty
Brooks, Alma
Faculty
Faculty in JGB Internal Medicine
Durbin, Nancy Lee
Faculty
Faculty in JGB Internal Medicine
Mazzarella, Juanita
Faculty
Faculty in JGB Internal Medicine

OVERVIEW

The Review Form Template is designed to capture data about a resident or fellow at the end of a Review Period if no meeting date is scheduled. For example, if the Review Period is 7/1/16 - 12/31/16, the data will be captured on the evening of December 31st. However, if a meeting date is entered, the data will be captured based on the number entered in the Reporting Tools section of the form template.

Note: The review captures data for the resident or fellow's current program.

MEETING DATES & DATA CAPTURE

If a meeting date is entered:

- Data will be automatically captured seven days prior to the meeting date. See **Change Data Capture Date** below to change the default of 7 days.

- Data is captured overnight if the meeting date is less than seven days away.

  For example, if you set your Meeting Date for three days from now, but the default is still set at seven days, the data will be captured tonight and will be available tomorrow.

Entering a meeting date in the past:

- Data will have to be captured manually

If no meeting date is entered:

- Data will be captured automatically on the evening of the last day of the Review Period.

  For example, if the Review Period is 1/1/14 - 6/30/14, and no meeting date has been entered, the data will be captured on the evening of June 30th.

CHANGE DATA CAPTURE DATE

Review Form Template

You can change the default setting of 7 days on your form template by following these steps:

1. Go to *Portfolio > Form Templates*
2. Click **Edit**
3. In the Reporting Tools section, click **7 days** (for example)
4. Change the number
5. Click **Save**

Individual Resident's Review Form

If the form template has already been assigned to a resident, you can still change the default of 7 days on the assigned review. Follow these steps to change the data capture date on a single resident's Review form:

1. Go to *Portfolio* > *Reviews*
2. Click **View** in front of a resident's Review
3. Click **Form Settings**
4. In the Reporting Tools section, click **7 days** (for example)
5. Change the number
6. Click **Save**

Manage Reviews

Add meeting dates and times from the Manage Reviews page

1. Go to *Portfolio* > *Reviews* > *Manage Reviews*
2. Find the person in the subject column
3. Enter the meeting date in the Meeting column.
4. Click **Save Dates** on the tool bar at the top of the page
5. Or click **Details** and enter the meeting date and time
6. Click **Save Meeting Date/Time**

REVIEWS - DATA CAPTURE - MANUAL

You can manually capture review data at any time.

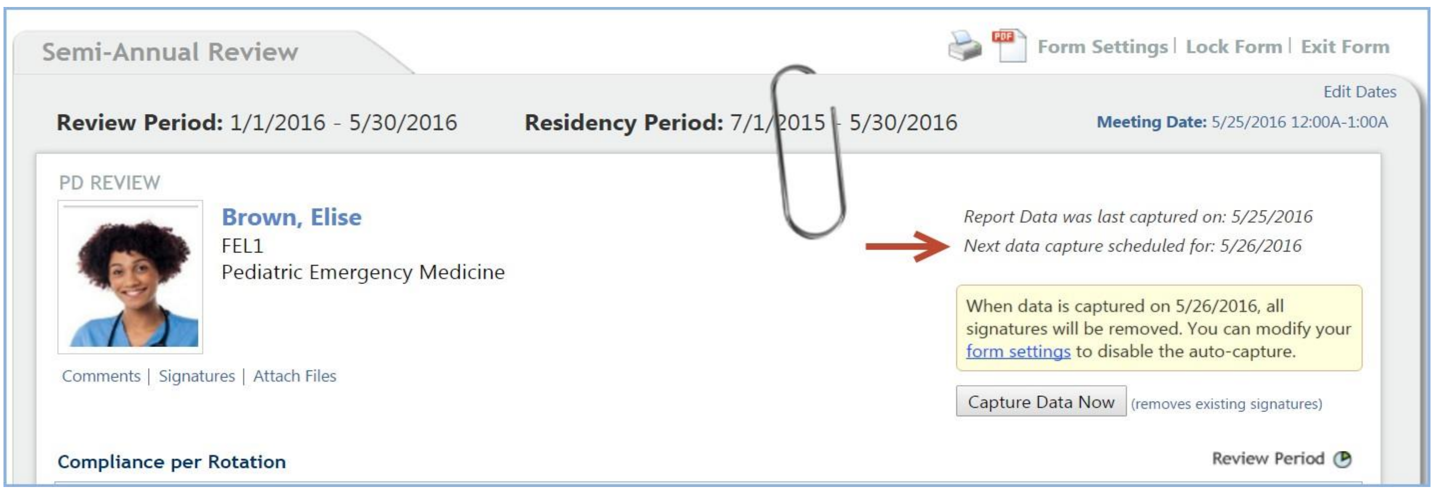
- Data is only captured for the resident or fellow's current program.

1. Go to *Portfolio* > *Reviews*
2. Click **View** in front of a resident's scheduled Review
3. Click **Capture Data Now**

IMPORTANT NOTE: Signatures will be deleted any time data is captured. Both manual and auto capture will remove signatures.

If the data has been captured and signatures collected, **BEFORE** the end date of the review period, the data will be **RE-CAPTURED** on the date indicated in the 'reporting tools' section.

Example: In the example below, even though data was captured on 5/25, the Review template still has the auto capture date activated for 5/26. To disable the auto data capture, click 'form settings' link.



Clicking the form settings link, redirects you to the review form. **Uncheck** the automatic data capture and and **Save** at the bottom of the form. This action only affects this person's review. All other reviews will continue to have the auto capture option checked.

REVIEWS - EMAIL NOTIFICATIONS

Administrators can configure email notifications for Portfolio Reviews.

1. Go to *Portfolio* > *Notifications*
2. Click the **Reviews** tab
3. By default, boxes are checked for the following email notifications:
    1. Email the subject, reviewers and other commenters when a comment is added to a Review (included in the consolidated email the following day)
    2. Email Review participants when the Review's data is ready. (included in the consolidated email that same day) **Note**:Emails will not be generated when the data is captured manually or if the review period is in the past.
    3. Include an auto-login link in the email
4. Click **Save**

REVIEWS - PREPARE TO USE PORTFOLIO REVIEWS

Get Optimum Results

The Portfolio Reviews feature integrates many pieces of the software suite. In order to make the best use of the reporting widgets, we recommend taking some steps to ensure that you get optimum results.

REVIEW PARTICIPANTS

Residents

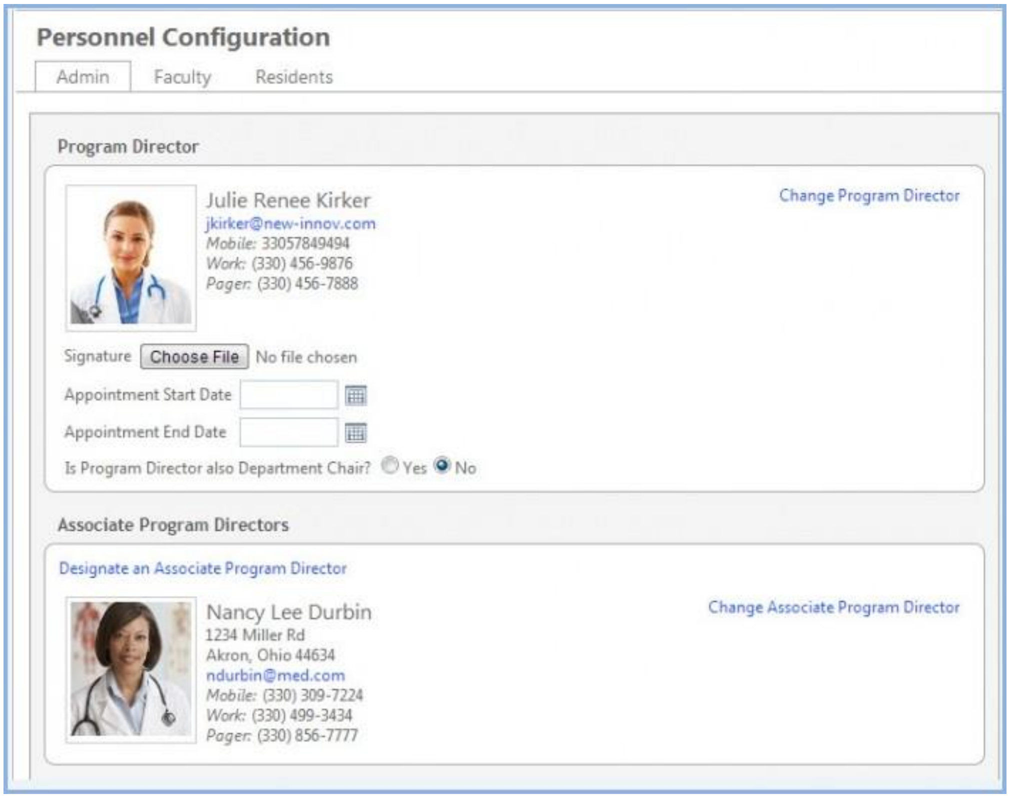
Be sure that each resident and fellow has a Training Record in their Personnel Record.

1. Go to *Personnel* > *Personnel Records*
2. Select a resident's record
3. Click **Training Record**

Program Directors and Associate Program Directors

Semi-Annual Reviews are conducted by Program Directors or Associate Program Directors. You can identify who these people are in advance by making sure they each have a record in Personnel and that they are identified in the Personnel section of your program. Having this information in the system insures they will be automatically included in the review.

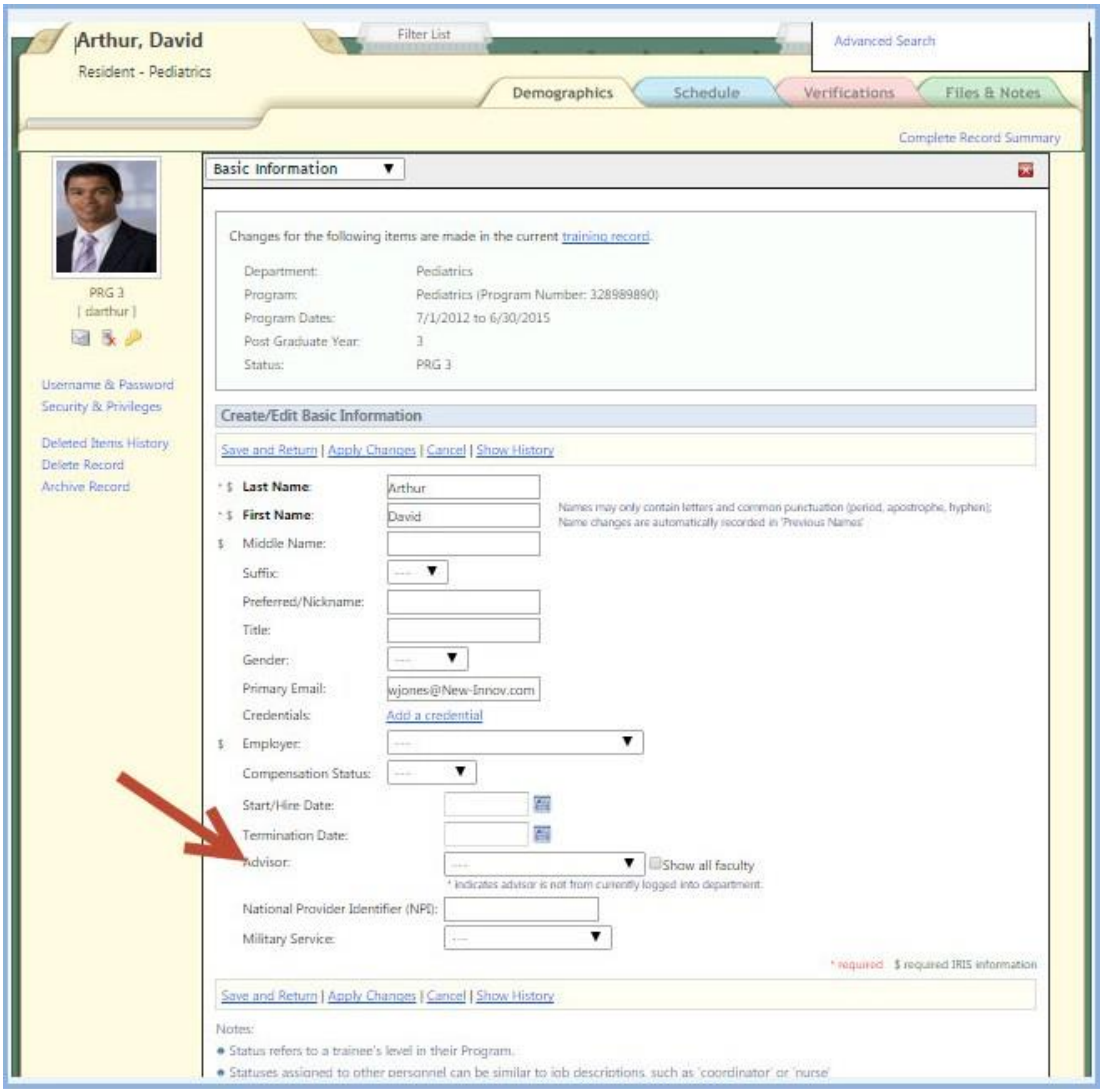
1. Go to Administration> Programs > Personnel
2. **Click** Designate a Program Director or Designate an Associate Program Director
3. Select the correct person
4. Click **Save**



Advisors

Advisors can be automatically included in the resident review by adding them to the resident's Personnel file.

1. Go to *Personnel > Personnel Records*
2. Select a resident's record
3. Click **Basic Information**
4. Select the Advisor
5. Click **Save and Return**



REVIEW DATA

Portfolio Review pulls data about your residents and fellows from each module in the software. For best results, we recommend that the following features be prepared in the software before creating your Portfolio Reviews.

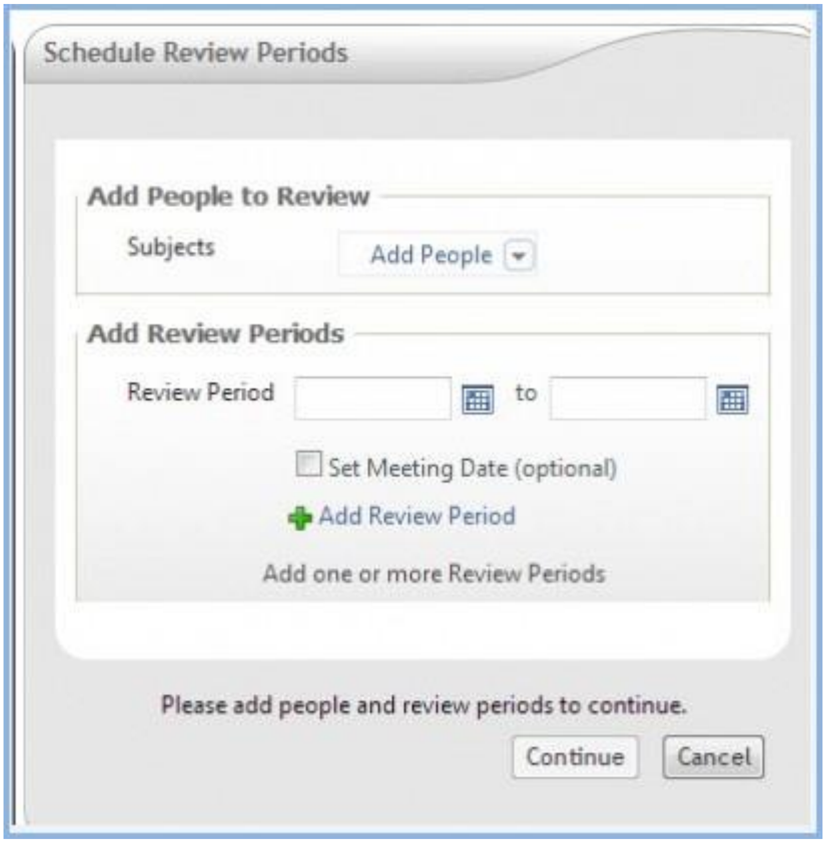
Module	Task	Path
Administration	Make sure correct CMS code is selected for your program	*Administration > Program > Configuration*
Administration	Check the Advancement Date for your program	*Administration > Program > Configuration*
Administration	Specify the Program Director and Associate Program Director in Program Personnel	*Administration > Program > Personnel > Admin tab*
Personnel	Enter all resident and fellow profiles	*Personnel > Add New Person* or *Personnel > Tools > Import ERAS Data*
Personnel	Make sure residents have an accurate training record	*Personnel > Personnel Records > Training Record*
Personnel	Assign Advisor to residents and fellows	*Personnel > Personnel Records > Basic Information > Advisor*
Personnel	Enter Certifications	*Personnel > Personnel Records > Certifications*
Personnel	Enter State Licenses	*Personnel > Personnel Records > Licenses*
Personnel	Enter Test scores	*Personnel > Personnel Records > Test Scores*
Schedules	Check that rotations, status type and program are correct in the resident and fellow block schedules	*Schedules > Schedule Rotations > Select Resident*
Schedules	Configure Rotation Requirements	*Schedules > Block Scheduling > Setup > Rotation Requirements*
Schedules	Upload and assign curriculum for rotations	*Schedules > Curriculum > New or Edit Existing*
Schedules	Check to see that the assignment definition for Continuity Clinics is marked is a Continuity Clinic	*Schedules > Scheduling Assignment > Setup > Assignment Definitions*
Schedules	Assign residents to the continuity clinic	*Personnel > Personnel Records > Continuity Clinic* *Schedules > Assignment Scheduling > Add Continuity Clinic*
Conferences	Create Conferences	*Conferences > Manage Conferences > Add*
Conferences	Take Attendance	*Conferences > Configuration & Defaults* *Conferences > Record Attendance*

Duty Hours	Configure Duty Hour module	*Duty Hours > Setup > Basic Configuration* *Duty Hours > Setup > Rule Configuration*
Duty Hours	Make sure that resident and fellow duty hours have been checked by the duty hours rules	*Duty Hours > My Duty Hours > View Hours*
Evaluations	Confirm that Core Competencies are linked with Categories used on the resident evaluation form	*Evaluations > Evaluation Forms > Categories*
Evaluations	Create sessions for Resident Evaluation of Faculty, Faculty Evaluation of Resident, and Resident Evaluation of Rotation	*Evaluations > Sessions > Add New Session*
Procedure Logger	Configure Procedure Logger module	*Logger > Configuration > General, Privileging and Fields tabs*
Procedure Logger	Enter Roles and establish targets for Procedures	*Logger > Lists & Fields > Procedures tab & Roles tab*
Procedure Logger	Check that procedure logs have been confirmed by a supervisor	*Logger > Confirm Procedures*
Portfolio	Check that Core Competencies are assigned to Scholarly Activity forms	*Portfolio > Scholarly Activity > Forms*
Portfolio	Enter scores on Milestone Reviews	*Portfolio > Milestones*

REVIEWS - SCHEDULE

You can schedule meeting dates for the Reviews from the *Portfolio* > *Reviews* page.

1. Click **New**
2. Choose the Form Template
3. Click **Continue**
4. Click **Add People**
5. Move the subject names in the left column to the right column to include in the review by clicking and dragging or by highlighting the name and using the arrow keys.
6. Click **OK** when subject selection is complete
7. Enter the start and end date of the review period
8. Set the meeting date, if desired
9. Click **Add Review Period**
10. Enter as many review periods as needed
11. Click **Continue**
12. Confirm which reviews to schedule and click **Schedule Selected Reviews**



REVIEWS - WIDGET DICTIONARY

Within your Portfolio Reviews, you can select what types of data is gathered into the form through the use of widgets. Each of the widgets are described in detail below.

Widget	Description	Filters & Display Information	Configurability	Source
Continuity Clinic Counts	A list of the total number of clinics worked and the total number of weeks when clinics were worked from the beginning of the residency period to the end date of the review period	- Includes all continuity clinics scheduled prior to the review period end date (Assignments in Assignment Schedule must have the Continuity Clinic "CC" designation") - Each row represents a training year Total clinics column contains a count of scheduled continuity clinics in the training year - Clinic weeks column contains the number of calendar weeks within each training year that included at least one continuity clinic assignment	- The name of the widget can be changed - The time frame can be adjusted to display continuity clinic totals for the Review Period or the Residency Period	Assignment Schedules
Compliance Per Rotation	A list of rotations indicating that the subject confirmed the assigned curriculum and completed the corresponding evaluations of the faculty and rotations	- Includes rotations that end within the review period - Shows Primary rotations only - The program identified in the scheduled rotations must be the same as the review program in order for the rotation to appear on this widget	The name of the widget can be changed	- Curriculum - Block Schedules - Evaluations
Rotation Requirements	A report showing the subject's progress toward meeting rotation requirements as configured in *Schedules > Block Scheduling > Setup, Rotation Requirements*	- This widget is only available if you use the Rotation Requirements feature - Information will be displayed for the entire residency, not just for the review period - Residents and fellows must be on primary rotations for their time to count toward the rotation requirements - The program identified in the scheduled rotations must be the same as the review program in order for the rotation to appear on this widget	The name of the widget can be changed	Block Schedules

Conference Attendance	A report of conferences showing the attendance percentage and the number of times the subject was tardy, excused and present. The Department/Division must have a 'Conference Attendance Requirement' set up for the conferences to appear on the widget.	- Includes conferences that list the resident on the roster - Includes conferences that end within the review period start and end dates Note: The widget states that this report will display required conferences; however, the report will include data from both required and not required conferences.	- The name of the widget can be changed - The time frame can be adjusted to display conference attendance statistics for the Residency Period	Conferences
Curriculum Confirmed	A list of rotations indicating whether the subject confirmed the corresponding curriculum	- Lists curriculum attached to Primary rotations that end within the review period - The program identified in the subject's scheduled rotations must be the same as the review program in order for them to appear on this widget	The name of the widget can be changed	- Curriculum - Block Schedules
Duty Hour Violations	A list indicating Duty Hours statistics and violations for each rotation	- Statistics will be displayed for primary rotations only - Rotations must start before the end date of the review period - There must be at least four weeks in the review period - Logs must have been checked against the rule configurations - Hrs/Wk shows the average number of hours worked per week, determined by the following equation: [total hours ÷ (number of days on the rotation - the number of vacation/leave days)] x 7 and recorded logs must include a Duty Type configured in the 80 Hour Rule in the department that owns the rotation the resident was scheduled on when the hours were logged - Calls or violations that span rotations count will be displayed with the rotation where the log begins - Violation counts represent violations of the home department's rules unless the rotation is from an outside department that has its own rules configured - The program listed in the subject's scheduled rotations must be the same as the program where the review takes place	- The name of the widget can be changed - You may choose to display violations from of ACGME, AOA or NYS rules	- Duty Hours - Block Schedules

Competency by Rotation	A report showing the subject's competency-based evaluation scores by primary rotation	- Primary rotations will be listed as they appear on the completed evaluation - Unspecified rotations will not be displayed - The primary rotation end date on the block schedule must fall within the configured time period - The match end date must fall within the scheduled rotation period - Evaluation results are included for responses to evaluation questions that have a core competency tag - Includes data from evaluations regardless of anonymity settings Includes data from archived evaluation forms - Excludes data from evaluations that are on hold - The following data will be displayed for each competency by rotation: • Rotation name • Rotation start and end dates - The following data will be displayed for each competency by rotation: • Core competency name • Aggregated evaluation results for each competency • Grade scale - Only responses from Rating scales will be displayed - Different Rating scales with the same number of options that have the same values will be combined on the same chart - Results from different Rating scales with a different number of options will appear on separate charts Note: Results from these types of questions will NOT appear on this widget: • Subcompetencies • Custom subcompetencies • Milestones	- The name of the widget can be changed - The time frame can be adjusted to display data for the Review Period or the Residency Period - Results from outside departments can be excluded	Evaluations
Competency by Resident Year	A Report showing the subject's competency-based evaluation scores aggregated by residency year	- Results are included if the match end date falls within the configured time period for the widget - Results are included for responses to evaluation questions that have been tagged with a core competency - Includes data from anonymous evaluations - Includes data from archived evaluation forms - Excludes data from evaluations that are on hold - The following data will be displayed for each year in program, competency and grade scale:	- The name of the widget can be changed - The time frame can be adjusted to display data for the Review Period or the Residency Period - Results from outside	Evaluations

		• Status
		• Residency Year Start Date – earliest evaluation match start date for this status type
		    o Must fall between the program start and end dates
		    o Evaluation dates and status come from the match
		• Residency Year End Date – latest evaluation period start date for this status type
		    o Must fall between the program start and end dates
		    o Evaluation dates and status come from the match
		• Competency
		• Aggregated evaluation results for competency
		• Grade scale
		    o Only Rating scales appear
		    o Different Rating scales with the same number of options having the same values are displayed on the same chart
		    o Separate charts are displayed for each Rating scale with different numbers of options (e.g. 1-5, 1-9)
			departments can be excluded, if allowed by the session	

Evaluation Comments - All	A report showing comments from any evaluation within the selected date range sorted by tag and question	- Comments from evaluations with match end dates that fall within the review period - Comments will display by Competency, Custom tag, then by question; then comments that are not tagged and Overall Comments - Overall comments will display - Includes data from anonymous evaluations - Includes any comments from an evaluation - Includes data from archived evaluation forms - Excludes data from evaluations that are on hold	- The name of the widget can be changed - The Time Period can be et to display data for the Review Period or Residency - Can include comments from evaluations completed during the time frame - Results from outside departments can be excluded	Evaluations
Evaluation Comments – By Competency	A report showing the subject's competency-based comments and general evaluation comments by rotation	- Rotations will be listed as they appear in the completed evaluation (Unspecified rotations of N/A will not display on this widget) - The rotation end date from the block schedule must fall within the configured time period - The match end date must fall within the scheduled rotation dates - Only comments from questions that have been tagged with a core competency will	- The name of the widget can be changed - The Time Period can be adjusted to display data for the Review Period or Residency	Evaluations

		display - Only comments from faculty evaluations of residents will display - Overall comments will be displayed - Includes data from anonymous evaluations - Includes data from archived evaluation forms - Excludes data from evaluations that are on hold	- Can include comments from evaluations completed during the time frame - Results from outside departments can be excluded	
Log Book Counts	A report showing a count of entries created for each Log Book	Shows logs entered for the review period and for the entire residency	- The name of the widget can be changed - The list of Log Books can be filtered	Log Books
Certifications	A configurable list of certifications from the subject's Personnel Data record	- The following fields will be displayed: • Certification type • Description • Start Date • End Date - If the certification information is not entered for a certification type, the type will be listed with a blank row - If the certification is expired, it will appear in red	- The name of the widget can be changed - Certification types can be filtered	Personnel
Custom Personnel Data	A list of information from any custom data field available in Personnel	- Shows the Custom Data field name - Shows the Value entered into the custom data field for the resident - Note: If the custom data is not entered for a field for the subject, the value column will be blank for that custom data field	- The name of the widget can be changed - Custom Data fields can be filtered	Personnel
Training Record	A list of the Residency Training Record from the subject's personnel record	The following fields will be displayed: • Start Date • End Date • Program Year • Status • Post Graduate Year	The name of the widget can be changed	Personnel
State Licenses	A list of all state Licenses from the subject's personnel record	The following fields will be displayed: • Description • State • Specialty • Number • Start Date • End Date If the license is expired, it will appear in red	The name of the widget can be changed	Personnel
Test Scores	A configurable list of Test Scores from the subject's Personnel record	The following fields will be displayed: • Test type • Date Taken • Score • Pass/Fail • Percentile If a test result hasn't been entered, the test type will display with a blank row	- The name of the widget can be changed - Test Score types can be filtered	Personnel

Journal Assignment Compliance	A list of journal assignments including totals of assignments assigned and completed	- Only the number Assigned during the review period will display - Assignments Submitted during the review period will display - If the number Submitted is red, the person has assignments that are overdue	The name of the widget can be changed	Portfolio
Milestone Progress	Shows the progress of the resident's subcompetency scores from each Milestone Review during the residency period	- Displays scores from Milestone Reviews given to the resident by the Clinical Competency Committee (Portfolio > Milestones) - Includes scores from Milestone Reviews that are both in 'Draft' mode and from those marked as 'Complete' - The Review Period must include the month of the milestone reporting period to display results - All prior results will be included - Off-Cycle Residents: The Portfolio Review period end date must be within 30 days of the persons Training Record end date for the milestone results to appear on the Review	The name of the widget can be changed	Portfolio
Scholarly Activity	A configurable list of scholarly activities including totals for each type of activity the subject logged	- Shows the number of Activities logged for each form - Only displays Activities where the subject is the owner, not a contributor - Activities must be logged in the department that owns the subject's program	- The name of the widget can be changed - The time frame can be adjusted to display Scholarly Activities for the Review Period or the Residency Period - Scholarly activity forms can be filtered	Portfolio
Scholarly Activity by Competency	A configurable list of competencies with totals for scholarly activities completed for each competency	- Shows the number of Activities logged for each core competency - Only displays Activities where the subject is the owner, not a contributor - Activities must be logged in the department that owns the subject's program	- The name of the widget can be changed - The time frame can be adjusted to display Scholarly Activities for the Review Period or the Residency Period - Activities can be filtered by core competency	Portfolio
Procedures Logged	A list of Procedures showing the number passed, not passed and the credentialing status of the	- Confirmed procedures that have been logged in the department that owns the subjects' program will display with the	- The name of the widget can be changed	Procedure Logger

	subject	following information: • Procedure name • Number of procedures passed during the residency (including offsets) • Number of procedures not passed during the residency • Resident credentials • By default, only procedures with targets will be displayed. Customize the widget to include all procedures - Archived procedures are not included - By default, all procedures that include a target number in the Oversight level of supervision will appear	- Procedures with targets can be filtered - Procedures can be filtered by name; and procedure names without a target - Oversight level can be selected in the filter	

PORTFOLIO REVIEWS - GLOSSARY

Data Capture - A data capture is the process of gathering information about your resident. It gives you a snapshot view of your resident's performance information. Data captures can be done manually or scheduled in advance.

Form Template - A Form Template is designed by an administrator to specifically meet your program's needs. When designing the Form Template, you select from various reporting widgets and determine who has access to the data. Once the data has been gathered for each resident into the Form Template, the Portfolio Review is ready to be viewed.

Portfolio Review - The Portfolio Review is a summary report of resident performance data. These are typically done on a semi-annual basis by Program Directors and on a quarterly basis by Advisors. A Form Template is created, the data is captured and the Portfolio Review is ready for signing.

Widget - A reporting widget gathers data about a certain module, such as Evaluations and Procedures. The administrator selects and arranges the widgets on your Portfolio Review form.

PORTFOLIO REVIEW - EXAMPLE

The next pages is a sample of a completed Portfolio Review. Your Review may appear different depending on the reporting widgets that were added to your Review form.

Semi-Annual Review

Review Period: 7/1/2016 - 12/31/2016 **Residency Period:** 7/1/2015 - 12/31/2016 **Meeting Date:** 3/1/2017 11:00A-12:00P

RESIDENT REVIEW

Resident, Superstar
RL2
MMCGME-Fake Medicine Residency
myemail@email.com
Advisor: Andy Griffin

Report Data was last captured on: 1/22/2017

Curriculum Confirmed

Review Period

Rotation	Start Date	End Date	Reviewed Curriculum
GYNECOLOGY	7/1/2016	7/31/2016	
INTERNAL MEDICINE	8/1/2016	8/31/2016	
PATHOLOGY	9/1/2016	9/30/2016	
PEDIATRICS	10/1/2016	10/31/2016	
RADIOLOGY	11/1/2016	11/30/2016	
PSYCHOLOGY	12/1/2016	12/9/2016	
FAMILY MEDICINE	12/10/2016	12/31/2016	N/A

Duty Hour Rule Violations

Review Period

Rotation	Start Date	End Date	Hrs/Wk	80 Hr	24+	Call	Short Break	Days Off	Night Float
GYNECOLOGY	7/1/2016	7/31/2016	55.53	0	0	0	0	0	0
INTERNAL MEDICINE	8/1/2016	8/31/2016	62.73	0	0	0	0	0	0
PATHOLOGY	9/1/2016	9/30/2016	53.37	0	0	0	0	0	0
PEDIATRICS	10/1/2016	10/31/2016	53.28	0	0	0	0	0	0
RADIOLOGY	11/1/2016	11/30/2016	69.65	0	0	0	0	0	0
PSYCHOLOGY	12/1/2016	12/9/2016	49.52	0	0	0	0	0	0
FAMILY MEDICINE	12/10/2016	12/31/2016	0.00	0	0	0	0	0	0

Compliance per Rotation

Review Period

Rotation	Start Date	End Date	Evaluation of Rotation	Evaluation of Faculty	Reviewed Curriculum
GYNECOLOGY	7/1/2016	7/31/2016	1 of 1	N/A	2 of 2
INTERNAL MEDICIINE	8/1/2016	8/31/2016	1 of 1	N/A	1 of 1
PATHOLOGY	9/1/2016	9/30/2016	1 of 1	N/A	1 of 1
PEDIATRICS	10/1/2016	10/31/2016	1 of 1	N/A	1 of 1
RADIOLOGY	11/1/2016	11/30/2016	0 of 1	N/A	1 of 1
PSYCHOLOGY	12/1/2016	12/9/2016	0 of 1	N/A	0 of 1
PSYCHOLOGY	12/1/2016	12/9/2016	0 of 1	N/A	0 of 1
FAMILY MEDICINE	12/10/2016	12/31/2016	N/A	N/A	N/A

Competency by Rotation

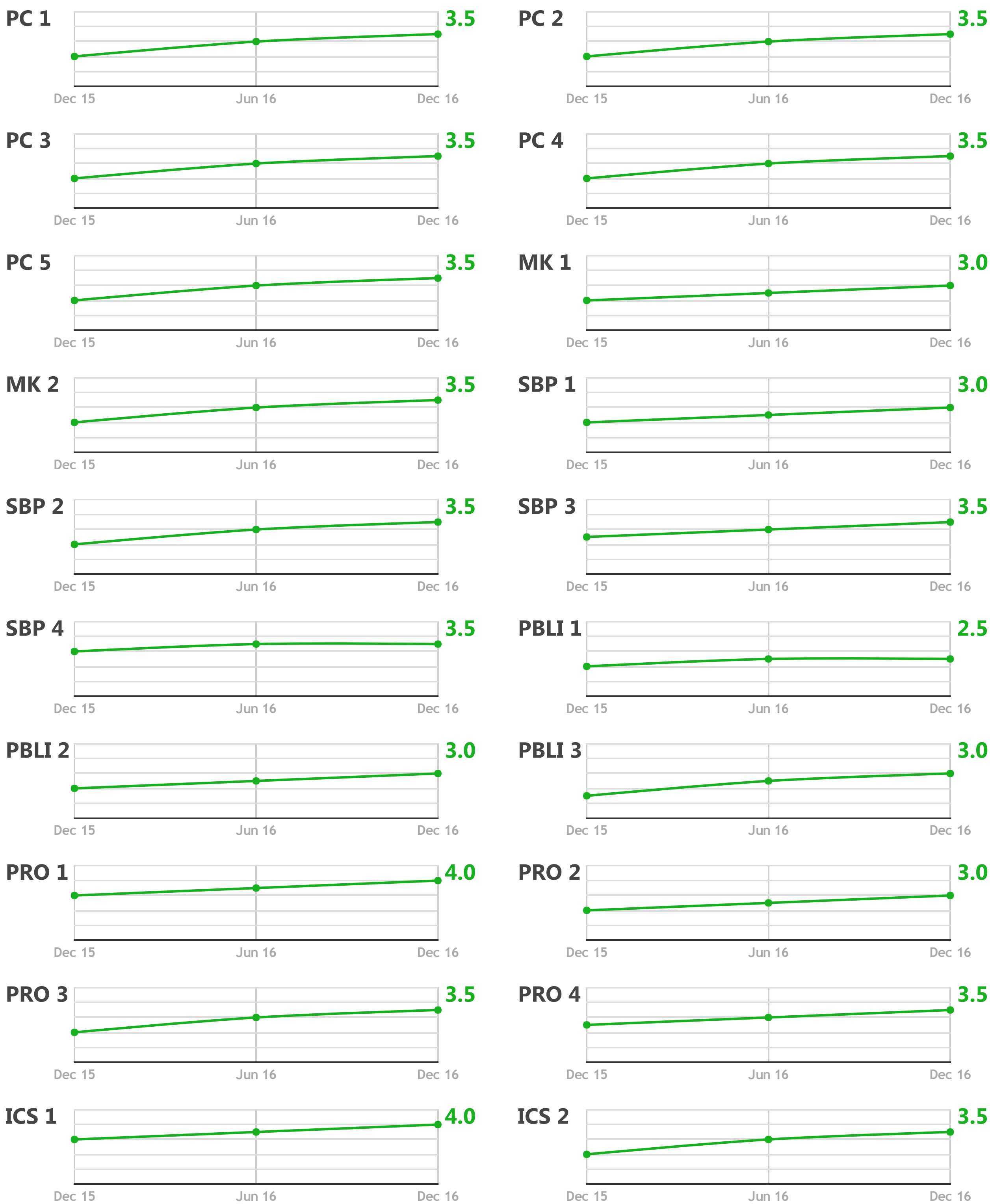
Review Period

	Rotation	Dates	Patient Care	Medical Knowledge	Systems-Based	Practice-Based	Professionalism	Interpersonal
	Scale: 1 to 5							
	GYNECOLOGY	07/01/2016 - 07/31/2016	3.00	2.50	---	---	---	---
	INTERNAL MEDICINE	11/01/2016 - 11/30/2016	3.00	---	---	---	---	---

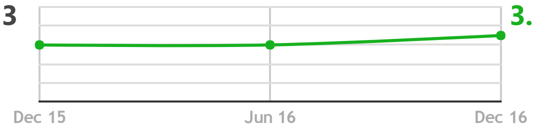
	Rotation	Dates	Patient Care	Medical Knowledge	Systems-Based	Practice-Based	Professionalism	Interpersonal

Milestone Progress Residency

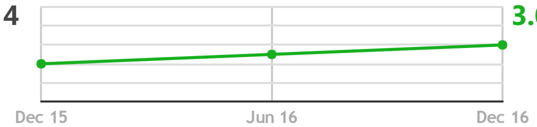
Fake Medicine



ICS 3 3.5



ICS 4 3.0



Procedures Logged

Residency

Procedure Name	Independent Target	Review Total Passed	Review Total Not Passed	Residency Total Passed	Residency Total Not Passed	Independent
ICU Patient Spinal Tap	15	3	0	0	0	
	10	0	0	0	0	
Suture removal	30	5	0	53	0	✓

Journal Assignment Compliance

Review Period

Assigned	Submitted
10	8

Conference Attendance

Review Period

% Attended = Present / (# Required - Excused)

	Status	Department	Category	# Conferences	# Required	Present	Tardy	Excused	% Required	% Attended
	Home Department									
	RL2	MMCGME-Fake Medicine Residency	---	113	113	37	0	76	50%	100%
	RL2	MMCGME-Fake Medicine Residency	M&M	1	1	0	0	1	50%	---
	RL2	MMCGME-Fake Medicine Residency	Journal Club	2	2	0	0	2	50%	---
	RL2	MMCGME-Fake Medicine Residency	Resident/Faculty	1	1	0	0	1	50%	---
			Totals:	117	117	37	0	80		Avg: 100.00%
			Grand Totals:	117	117	37	0	80		Avg: 100.00%

Resident Training Records

Residency

	Start Date	End Date	Program Year	Status	PGY
	MMCGME-Fake Medicine Residency				
	7/1/2015	6/30/2016	1st Year in Residency	RL1	1
	7/1/2016	6/30/2017	2nd Year in Residency	RL2	2
	7/1/2017	6/30/2018	3rd Year in Residency	RL3	3

Progress Summary

Overall Progress ● Meets Expectations ○ Requires Attention

Competency Progress

Patient Care ● Meets Expectations ○ Requires Attention
Medical Knowledge ● Meets Expectations ○ Requires Attention
Systems-Based Practice ● Meets Expectations ○ Requires Attention
Practice-Based Learning and Improvement ● Meets Expectations ○ Requires Attention
Professionalism ● Meets Expectations ○ Requires Attention
Interpersonal and Communication Skills ● Meets Expectations ○ Requires Attention

Comments

Superstar has done a wonderful job this year and there are no concerns about their progress.

Signatures

Subject	Resident, Superstar signed on 3/11/2017 at 9:42 AM
Advisor	Griffin, Andy signed on 3/12/2017 at 10:38 PM
Program Director	Director, Program signed on 3/15/2017 at 6:23 PM

Attached Files

- Resident- PGY2 - Biannual Mid Year Evaluations.pdf
- Resident - PGY2 Student Evaluations 12-2016.docx
- Resident - PGY2 Step Results 12-2016.docx
- Resident - PGY2 Ethics Exam 12-2016.docx
- Resident - PGY2 Time Recort 12-2016.docx
- Resident - PGY2 Learning Plan12-2016.docx
- Resident - PGY2 PSA 12-2016.docx
- Resident - PGY2 Procedures CCC 12-2016.pdf
- Resident - PGY2 Spring Event 12-2016.docx