Scholarly Activity, Curriculum, & Procedure Logger

MMCGME Services

2019

Scholarly Activity

NEW INNOVATIONS (RMS)

MMCGME Services

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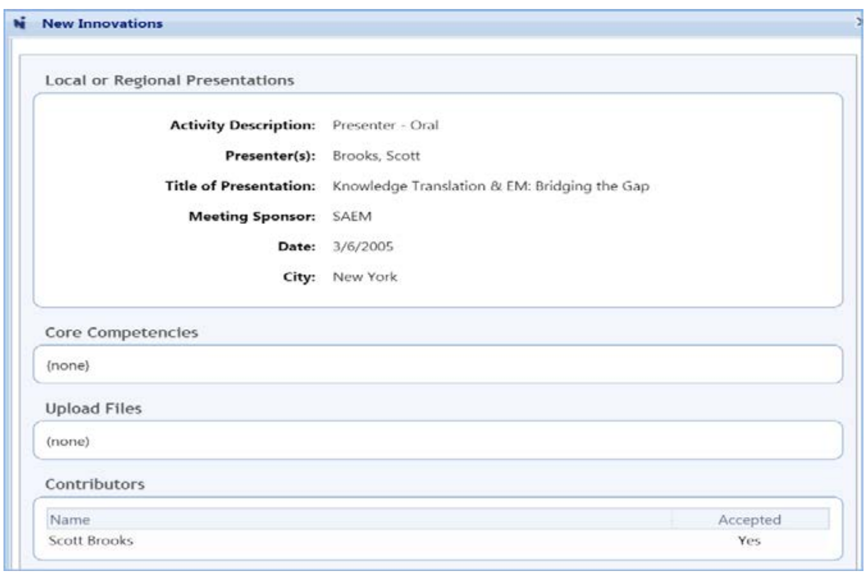
SCHOLARLY ACTIVITY – OVERVIEW

The Scholarly Activity module enables users to document the wide range of details involved in tracking progress and participation in scholarly activities. Various types of forms can be created to document such things as abstracts, grants, publications, and poster presentations. Both residents and faculty can document their activities.

GETTING STARTED

Administrators set up online forms to collect detailed information for each type of activity. New Innovations provides some basic templates which can be customized to meet program preferences for any type of scholarly activity. New forms can also be created to fit your needs.

Administrators can create and design forms that are made available to faculty and residents for the purpose of capturing all the relevant information about their scholarly activities, for example peer-reviewed journal articles and national presentations. Activities logged using these forms can then be tracked by the type of activity, ADS category, or by relevant activity dates. When setting up Scholarly Activity Forms, you can create a new form, copy an existing form, or use one of our templates. Once the forms are created in each department they can be used by department members and copied to other departments the administrator is privileged in.



PRIVILEGE LEVEL ACCESS FOR SCHOLARLY ACTIVITIES

Access to Scholarly Activities is given by the privilege level in the Portfolio Module.

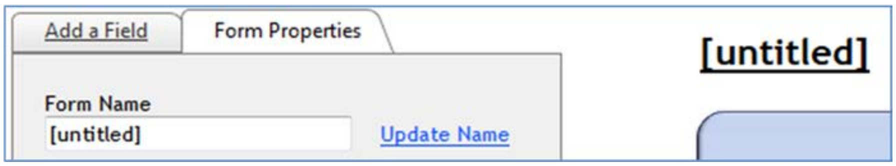
Level 2: Log Scholarly Activities; accept/refuse Contributions.
Levels 5/6: Create/manage Scholarly Activity Forms; Log Scholarly Activities for others; generate reports for their department/division.

CREATE A FORM

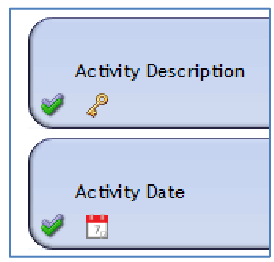
1. Go to *Portfolio > Forms*.
2. Click **New**.
3. Select **Create a New Form from Scratch** and then **Create Form**.
4. You may also use one of the templated forms. Select **Use a New Innovations Template**, choose the form, and then select **Create Form**. Edit any fields or names as needed.

CREATE FORM NAME

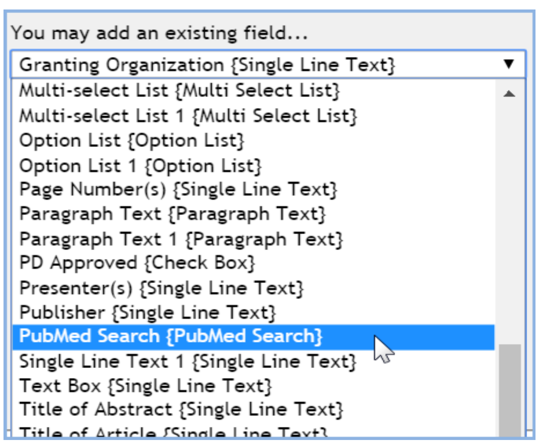
1. Click the section **[untitled]** to enter the name of the form and then **Update Name** to save the form name. You may also use the Form Properties tab to enter the name.



ADD AN EXISTING FIELD TAB



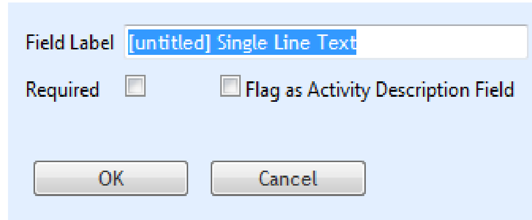
1. An Activity Description field (shown with key icon) and Activity Date field (shown with calendar icon) are provided, by default. These are the fields that will display when Activities are viewed and reports are generated.
2. Select an existing field from the drop-down list. These are suggested fields for your form provided by New Innovations. For example, one of the existing fields is **PubMed Search**. People using this field can search PubMed for articles and attach them to the form.



3. Once the selection is made, click **Add Selected Field**.
4. If desired, select **Customize** to change Field Label, make the field required, or indicate it should be used as an Activity Description or Activity Date field. Field will display a green checkmark if it is required.

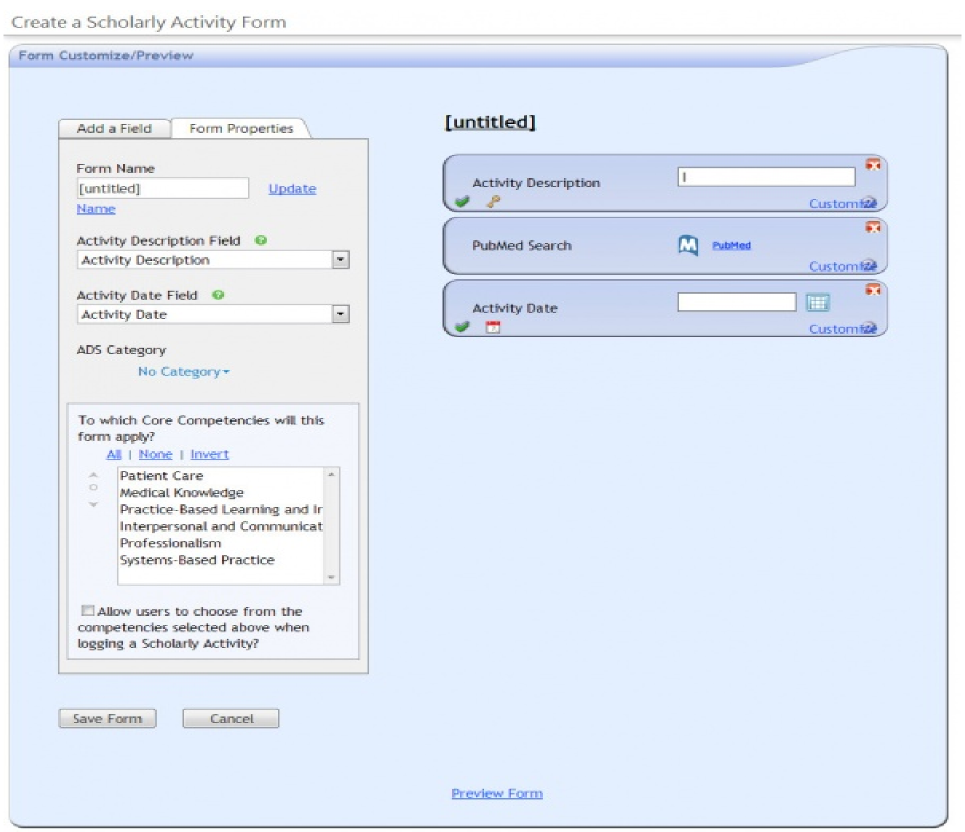
CREATE A NEW, CUSTOMIZABLE FIELD

1. From the Add a Field tab, select the field type: Single Line Text, Paragraph Text, Check Box, Check Box List, Option List, Multi-select List, Drop Down List, or Date Field.
2. Click **Customize** on the new field.
3. Enter a new Field Label. For fields with lists, enter the labels in the provided spaces.
4. If this field is required, check the box. Field will display green arrow if it is required.
5. Indicate that this field should be used as an Activity Description or Activity Date field.
6. Select **OK** to save.



FORM PROPERTIES TAB

1. Select Form Properties tab.
2. From this tab, the Form Name can be added/changed.
3. The Activity Description and Activity Date fields can be changed or added here (they will be displayed respectively with a key icon and a calendar icon).
4. Select the ADS Category from the dropdown menu.
5. Select Core Competencies that apply to the activity.
6. Check the box below the competency list to give users ability to choose any of the selected competencies. If not checked, the form automatically records all competencies selected.



FINALIZING THE SCHOLARLY ACTIVITY FORM

1. Drag and drop fields to rearrange their order.
2. To see the form before saving, select **Preview**. Select **Save** when finished.

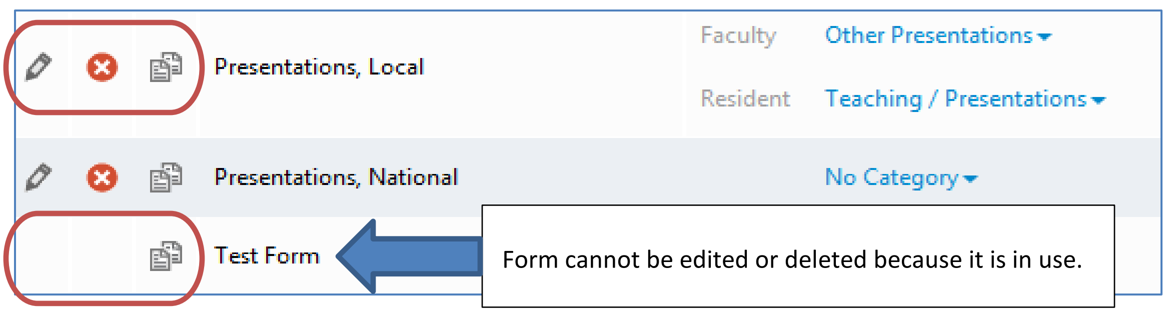
FAQ: WHAT IS AN 'ACTIVITY DESCRIPTION' AND 'ACTIVITY DATE' IDENTIFIER?

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.

EDIT, COPY, AND DELETE SCHOLARLY ACTIVITY FORMS

Scholarly Activity Forms that have **not** been used by your residents or faculty can be edited or deleted. This preserves the integrity of the data collected on the form. However, if changes need to be made to an existing form, make a copy of the form, edit the copy and archive the original form. All forms can be copied regardless if they have been used or not. Use the icons to perform these actions.



EDIT A SCHOLARLY ACTIVITY FORM

1. Go to *Portfolio* > *Forms*.
2. Click the **Pencil** icon.
3. Make your changes to the form and save.

COPY A SCHOLARLY ACTIVITY FORM

1. Go to *Portfolio* > *Forms*.
2. Click the **Copy** icon (two pieces of paper).
3. Select the Department you would like to copy the form to and click **Copy Form**.

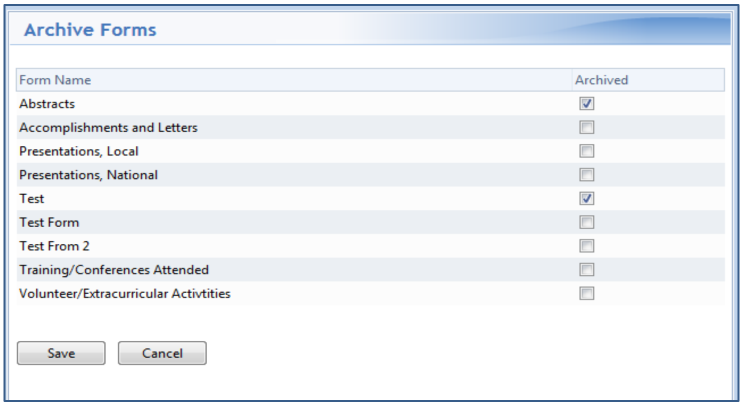
DELETE A SCHOLARLY ACTIVITY FORM

1. Go to *Portfolio* > *Forms*.
2. Click the **Delete** icon (red x).

ARCHIVE/UNARCHIVE SCHOLARLY ACTIVITY FORMS

To archive Scholarly Activity Forms no longer in use:

1. Go to *Portfolio > Forms*.
2. Click **Archive Forms** in the top right corner.
3. Check the box for the form you would like to archive.
4. Click **Save**.



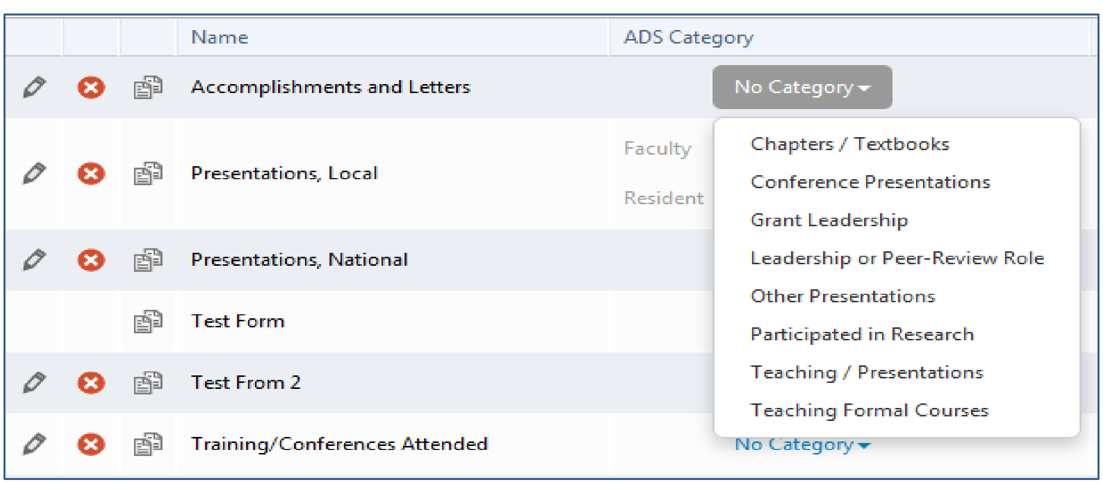
To unarchive Scholarly Activity Forms:

1. Go to *Portfolio > Forms*.
2. Click **Archive Forms**.
3. Uncheck the box for the form you would like to unarchive.
4. Click **Save**.

SCHOLARLY ACTIVITY FORMS - ADD ADS CATEGORIES

You may have Scholarly Activity Forms that have not been linked to one of the ADS Categories. When you link your forms to an ADS Category, information will be readily available on the ADS Category report. This will streamline your efforts for inputting data in the ACGME ADS site.

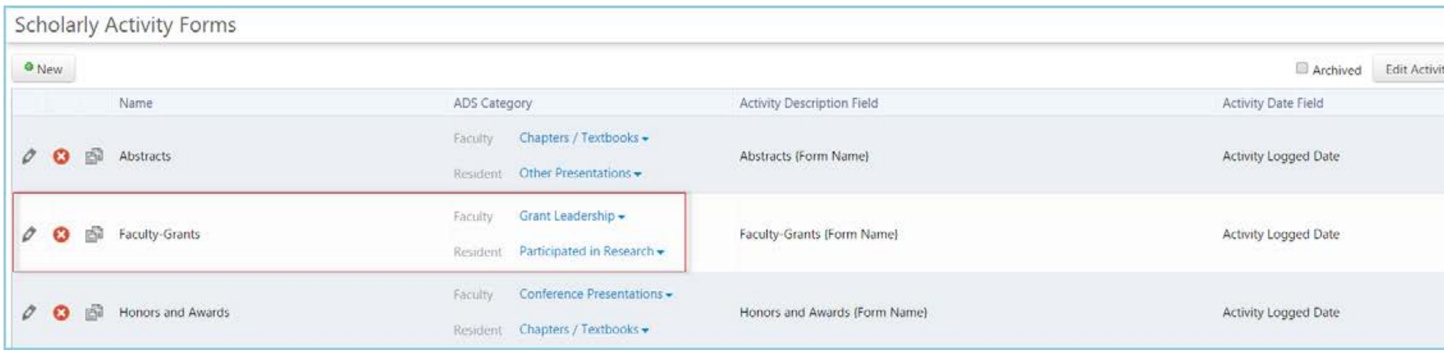
1. Go to *Portfolio > Forms*.
2. In the ADS Category column, click the header in the drop-down list: **No Category**.
3. Select one of the ADS Categories.
4. Selections are automatically saved.
5. Repeat the above process until all Scholarly Activity Forms have an ADS Category.



ADD A SECOND CATEGORY

Some categories are for both residents and faculty, so nothing further needs to be done after selecting the categories. But if a category is typically just for faculty, the coordinator has the option to add a second category showing that the form is also being used for the resident. For example, the form may be for faculty members who have acquired a grant. This would be a faculty only activity. However, a resident may perform some research in conjunction with that grant, so a second category can be added to the same form for the resident research. This will allow one form to have two categories: one for residents and one for faculty.

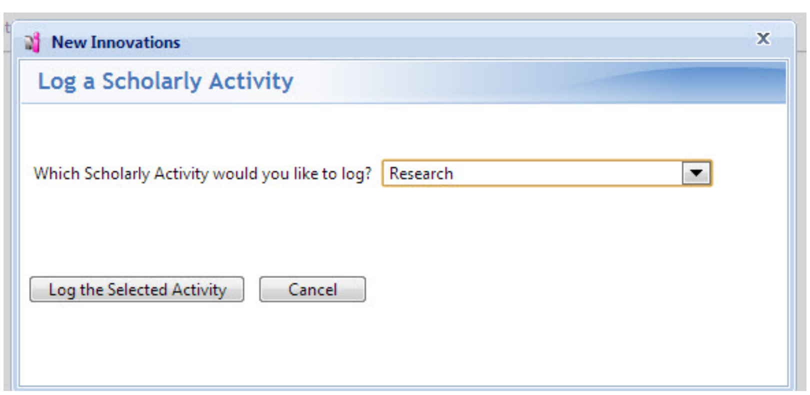
1. Click the small arrow beside the category.
2. Select one of the following:
    - **Add Resident Category**
    - **Add Faculty Category**
3. Select the appropriate category.
4. Selections are automatically saved.



LOG A SCHOLARLY ACTIVITY

Once a form is created, residents and faculty can log scholarly activities and achievements. They can select an appropriate form from the list of available forms and fill in the blanks. After activity forms are submitted, the details of each entry, including any uploaded documents, are recorded in the database. Each user can then review the history of their logged entries as well as those activities that they have been associated to as a contributor.

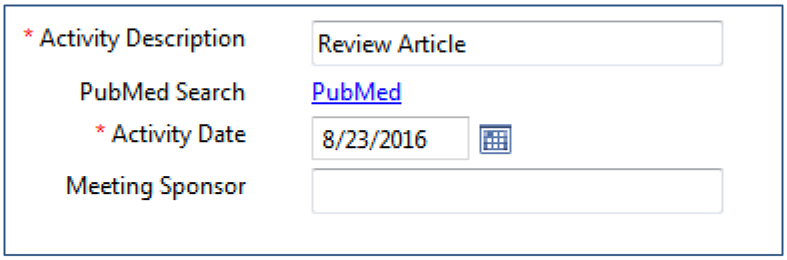
1. Go to *Portfolio > Scholarly Activity*.
2. Click **New**.
3. Select the type of Scholarly Activity you wish to log.
4. Click **Log the Selected Activity**.
5. Complete the entries and click **Save**.



PUBMED

If you have a field for adding PubMed search you can cite a resource in your log.

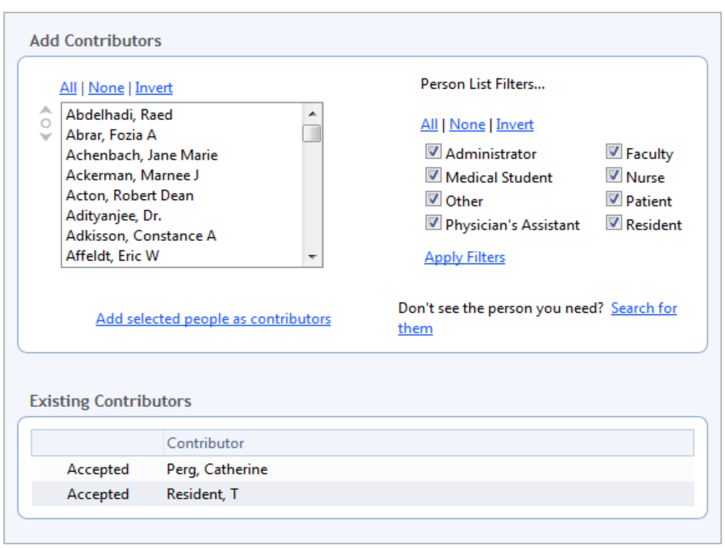
1. Click the PubMed link.
2. Enter a key word, such as a title or the author's name.
3. Click **Search**.
4. Scroll through the search result. Click the article link to read.
5. Once found, click **Select** to attach the article to your log.



ADDING CONTRIBUTORS

The Contributor field gives users the ability to log a scholarly activity and invite others in as collaborators. Once a user becomes a contributor, he or she can fully access that scholarly activity log. Contributors and authors of a particular scholarly activity can then access and share information in one place. When someone logs a scholarly activity, he or she can pick contributors from a list of all department members or search for people from other departments.

1. Click **Add Contributors** from the Contributors field.
2. Select contributor(s) from list. Narrow field by checking/unchecking roles within the Person List Filters or search by clicking **Search for them**.
3. Click **Add selected people as contributors**.
4. Click **Remove** beside name if wrong selection was made.



5. Once contributor acknowledges the Scholarly Activity, 'Accepted' will be displayed by their name.

CONTRIBUTOR NOTIFICATIONS

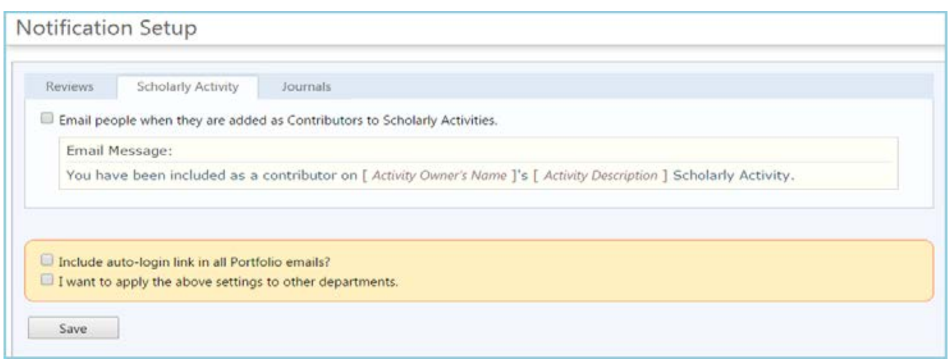
If a user has been designated as a contributor to a Scholarly Activity, he or she will receive a notification on their Home Page. Alternatively, users can select *Portfolio > Contributions* from the menu bar to view pending contributions.

1. Click **View** to review pending contributions.
2. Click the **Accept** or **Refuse** radio button, then click **Save**.
   - → When a user accepts a scholarly contributor role, they will have the details of the activity added to their list of entries. He or she can fully access that scholarly activity log.
   - → When a user refuses an activity, the confirmation simply is removed from the user's notification list. Further contributor solicitations can be directed toward the user regarding the same material regardless of previous refusals.

EMAIL NOTIFICATIONS TO CONTRIBUTORS

Administrators can configure email notifications for Scholarly Activity Forms.

1. Go to *Portfolio > Notifications*.
2. Click the **Scholarly Activity** tab.
3. Check the boxes for the following email notifications:
   - Email people when they are added as contributors to Scholarly Activities.
   - Include an auto-login link in the email.
4. If you have privileges in multiple departments, check the box to apply these settings to other departments.
5. Click **Save**.



EDIT/DELETE SCHOLARLY ACTIVITIES

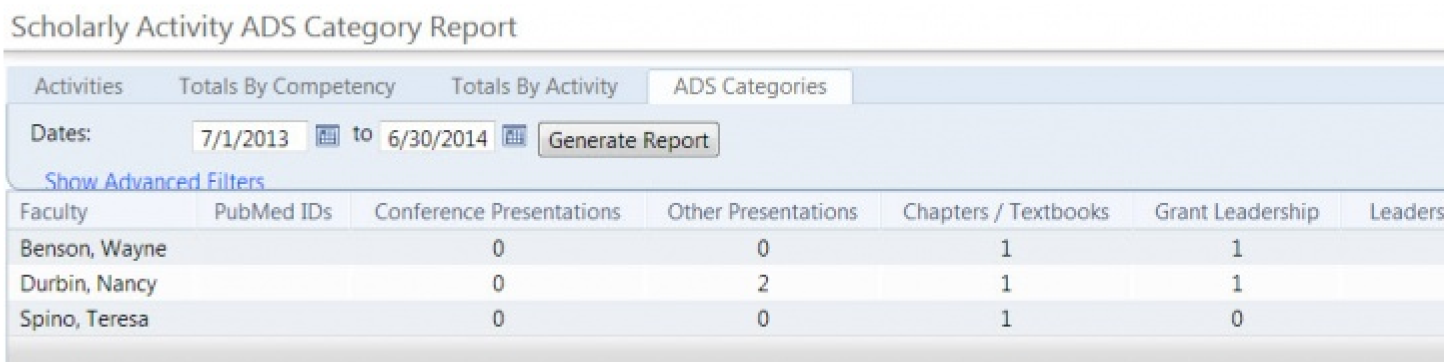
Users can view, modify, or delete existing scholarly activity entries by accessing the *Portfolio > Scholarly Activity* menu and clicking **Edit** or **Delete** next to the appropriate activity.

SCHOLARLY ACTIVITIES - ADS REPORT

This is the report coordinators will generate when they need to input data into the ADS link. It will display a summary of the number of items completed in each of the ACGME ADS categories.

Generate the ADS Report:

1. Go to *Portfolio > Activity Reports*.
2. Click the **ADS Categories** tab.
3. Select a date range and program.
4. Select **Core Faculty** or **Residents**.
5. Click **Generate Report**.



TROUBLE-SHOOTING:

If your faculty are not appearing on the report:

- Make sure you have designated your Core Faculty in the Program information pages. Go to *Administration > Program > Personnel*. Click the **Faculty** tab. Click **Designate Faculty** to add your faculty members.
- The report only shows activities from the faculty appointment date forward. Add an appointment date in the faculty member's Personnel file or in *Administration > Program > Personnel* and then **Faculty** tab.

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 seven ADS categories.

Curriculum

NEW INNOVATIONS (RMS)

MMCGME Services

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CURRICULUM – OVERVIEW

The Curriculum module offers you a place to store rotation goals and objectives and distribute them to residents and fellows prior to their scheduled rotations. Administrators can set up email and Home Page notifications to direct recipients to the curriculum documents.

Once the recipients read the curriculum, they can confirm they've read and understood the rotation goals and objectives. Program administrators can then generate Confirmation Reports and use them as documentation proving they have a process in place to distribute rotation goals and objectives and ensure that residents and faculty read and understood them prior to the start of their rotations.

Notes:

- The file size limit for uploads is 12 megabytes. However, you may encounter difficulties uploading documents over 8 megabytes due to specific institutional bandwidth limits.
- Program administrators can assign curriculum to any members of their own department.
- Curriculum documents uploaded to New Innovations cannot be revised. Make changes to the original document on your computer first and then swap it with the uploaded document or create a new Curriculum Definition and associate it with the revised curriculum document.
- To assign more than one curriculum document for the same rotation, create multiple Curriculum Definitions.

PRIVILEGE LEVEL ACCESS FOR CURRICULUM

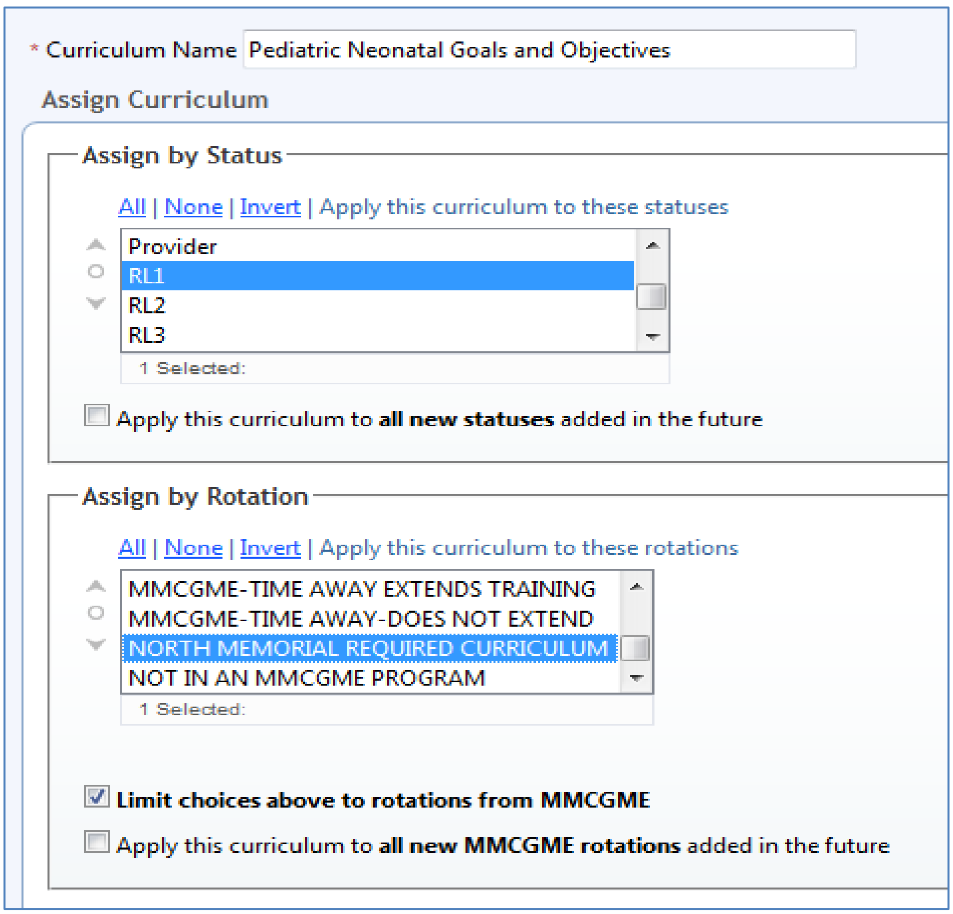
Access to Curriculum is given by the privilege level in the Block Schedule module.

Levels 1-4: View curriculum.
Level 5: Upload and view Curriculum Definitions; generate Confirmation Reports for their department/division.

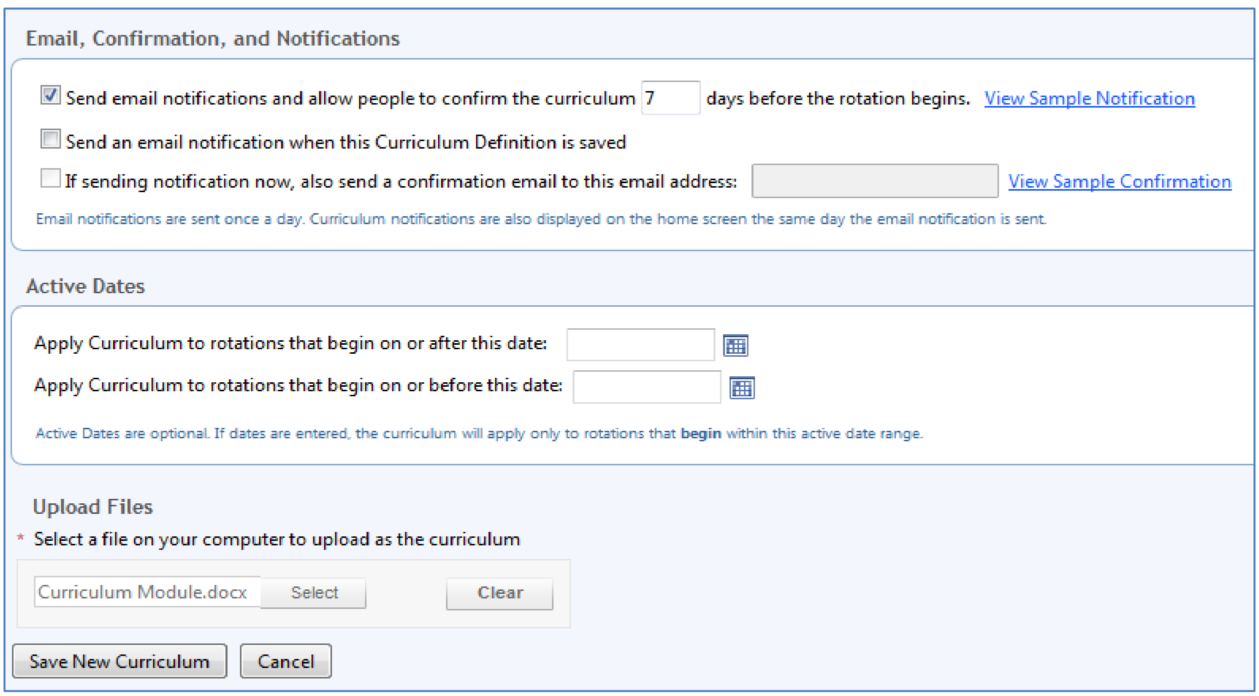
Note: Only the person assigned a Curriculum may confirm reading it. The Confirm link is not visible to others, including administrators.

CREATE A NEW CURRICULUM DEFINITION AND UPLOAD CURRICULUM DOCUMENTS

1. Go to *Schedules* > *Curriculum*.
2. Click **New**.
3. Enter the name of the curriculum in the provided text field, for example 'Pediatric Neonatal Goals and Objectives.'
4. In order to assign curriculum, you will need to:
   - **Assign by Status**: Select the status types who are required to read the curriculum.
   - **Assign by Rotation**: Select the name of the rotation the curriculum applies to. Narrow the list to only your department's rotations by checking the box labeled **Limit choices above to rotations from [your department]**.



5. **Email, Confirmation, and Notifications**: 'Send email notifications and allow people to confirm the curriculum __ days before the rotation begins.' Selecting this will place a Curriculum link on the person's Home Page AND send an email. **<u>If not selected, no link will appear on the Home Page</u>**.
6. **Active Dates**: If you want this new document to be distributed from this day forward, no dates need to be applied here. Active dates do not need to be configured unless the user wishes to apply the curriculum only to a specific date range. Set the dates for the period of time the curriculum should be used. (*Example*: When a program distributes a new curriculum at the start of an academic year, the Active Dates boxes could be used to designate which curriculum is distributed during the current academic year and which one will be distributed after the start of the new academic year.)
    - **Apply Curriculum to rotations that begin on or after this date**. This option checks the block schedule for people whose rotations begin on or after the specified date.
    - **Apply Curriculum to rotations that begin on or before this date**. This option checks the block schedule for people whose rotations begin on or before the specified date.
7. **Upload Files** *(Note: Files can be no larger than 12 MB)*:
    - Click **Select** to find the file on your computer.
    - Select the document.
    - Click **Open**. If the file is incorrect, select **Clear** and search again.
8. Click **Save New Curriculum** to upload the file and save the new Curriculum Definition.

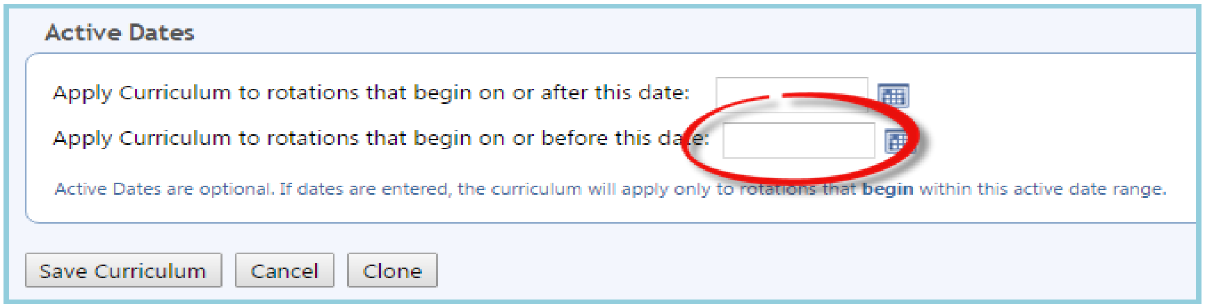


UPDATING EXISTING CURRICULUM

Using Curriculum Definitions, you are able to update your existing curriculum and designate the date it should start being distributed. You can apply the new document immediately or indicate a future date for its distribution. For example, you may have updated your curriculum, but want the old curriculum to continue to be distributed for the remainder of the current academic year. You can set date parameters on the old curriculum and set new date parameters, such as July 1, for the new curriculum.

APPLYING A FINAL DATE FOR THE OLD DOCUMENT

1. Go to *Schedules* > *Curriculum*.
2. Find the Curriculum Definition which needs an updated document and click **Edit**.
3. At the bottom of the page, insert a date in the field labeled 'Apply Curriculum to rotations that begin on or **before** this date.' This date should identify the last date on the block schedule that this old document is applicable.
4. Click **Save New Curriculum**.



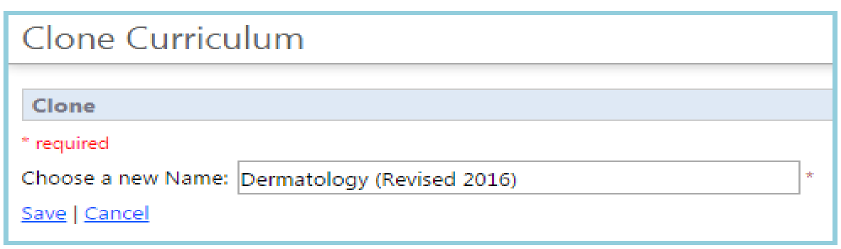
UPDATE EXISTING CURRICULUM

Uploading new curriculum requires two steps:

1. 'Clone' the Curriculum Definition.
2. 'Swap' the old document for the new document.

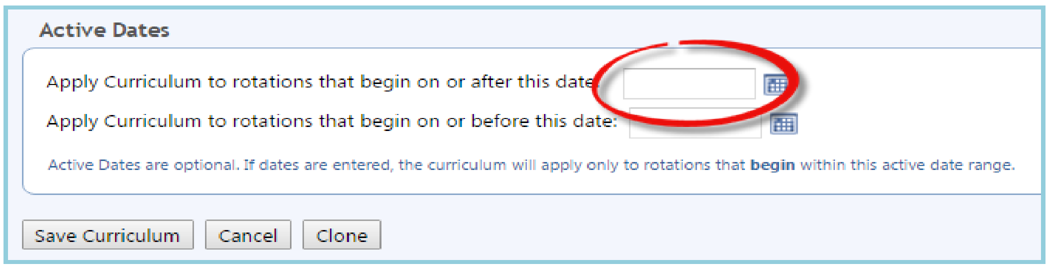
STEP 1) CLONE THE CURRICULUM DEFINITION

1. Go to *Schedules* > *Curriculum*.
2. Find the Curriculum Definition which needs an updated document and click **Edit**.
3. At the bottom of the screen click **Clone**.
4. Click **OK**.
5. Choose a new name. *Example*: Dermatology (Revised 2016).
6. Click **Save**.



STEP 2) SWAP THE DOCUMENT

7. Find the Curriculum Definition that had been cloned in the previous steps and click **Edit.**
8. Click **Swap File** and then **OK**.
9. Click **Select** to find the file on your computer.
10. Select the new document.
11. Click **Open**. If the file is incorrect, select **Clear** and search again.
12. Click **Save** and then **OK**.
13. Verify the Status, Rotation, and Email Settings (these are copied from the original curriculum).
14. Set **Active Dates**:
    - If you want this new document to be distributed from this day forward, no dates need to be applied here.
    - If you want this new document to start being distributed after a future date, such as beginning July 1 of the new academic year, enter the date (July 1, 20XX) in the box for 'Apply Curriculum to rotations that begin on or **after** this date.' The second date box should remain empty.
15. Click **Save Curriculum**.

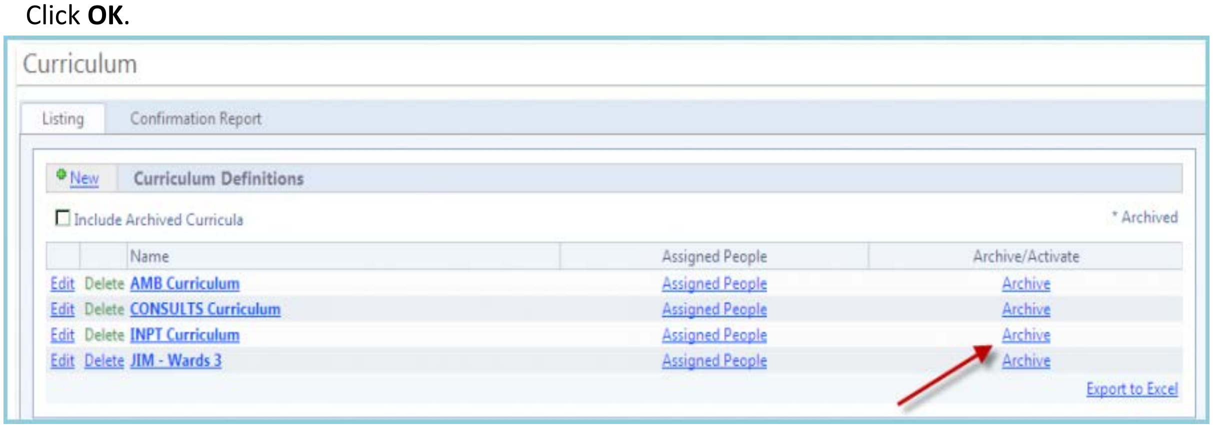


ARCHIVE/UNARCHIVE CURRICULUM

You are not permitted to delete any curriculum that has been used in the past since there is data attached to the curriculum that must be maintained. You can, however, archive the curriculum to remove it from view. Archiving a curriculum will prevent future distribution of the curriculum.

ARCHIVE CURRICULUM

1. Go to *Schedules > Curriculum*.
2. In the curriculum list, find the curriculum to be archived.
3. Click **Archive** on the right side of the screen.
4. Click **OK**.



VIEW THE ARCHIVED CURRICULA

1. Go to *Schedules > Curriculum*.
2. Check the box for **Include Archived Curricula**.

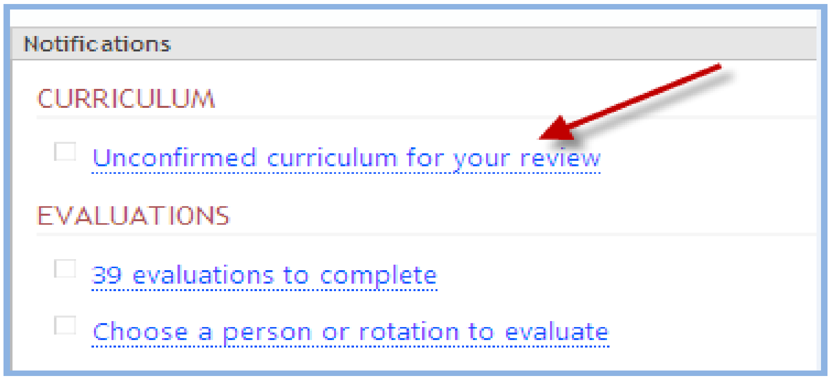
UNARCHIVE A CURRICULUM

1. Go to *Schedules > Curriculum*.
2. Check the box for **Include Archived Curricula**.
3. Click **Activate** for the curriculum you want to unarchive.
4. Click **OK**.

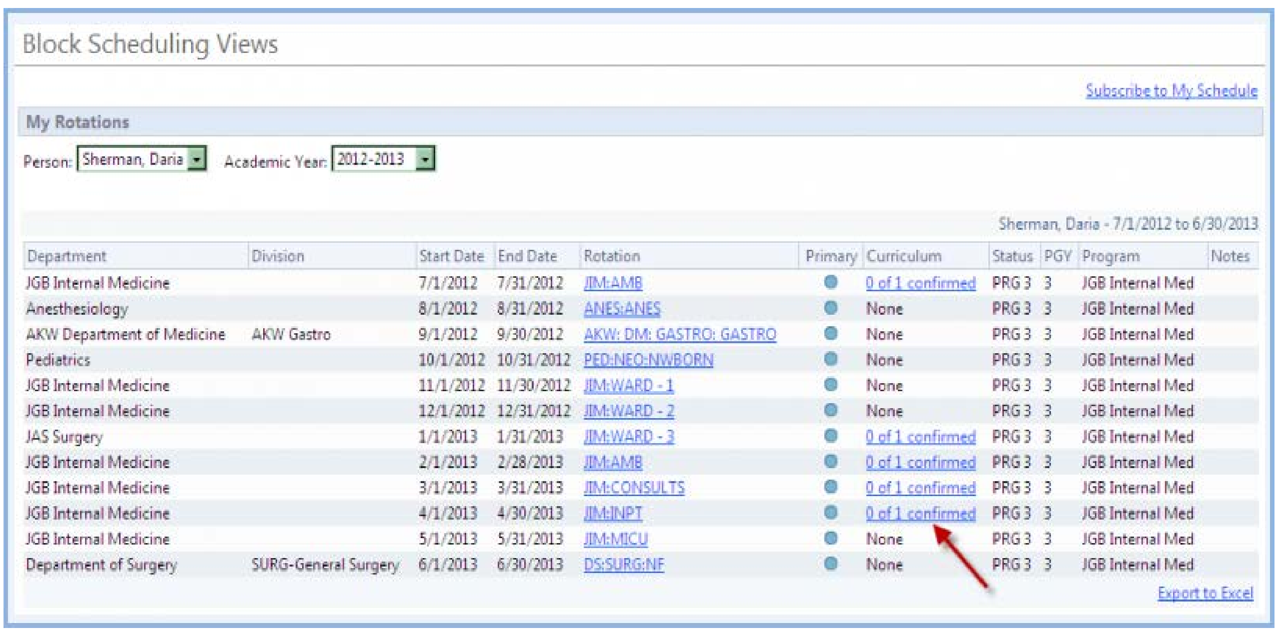
TRAINEE VIEWING AND CONFIRMING OF CURRICULUM

Only the person assigned a Curriculum may confirm reading it. The Confirm link is not visible to others, including administrators. They can view curriculum for the entire year, but can only confirm during the time frame indicated in the curriculum setup.

1. Go to the Home Page.
2. In the Notifications section, under Curriculum, click **Unconfirmed curriculum for your review**.



3. Click the link in the Curriculum column. For example, click **0 of 1 confirmed**.


Block Scheduling Views

Subscribe to My Schedule

My Rotations

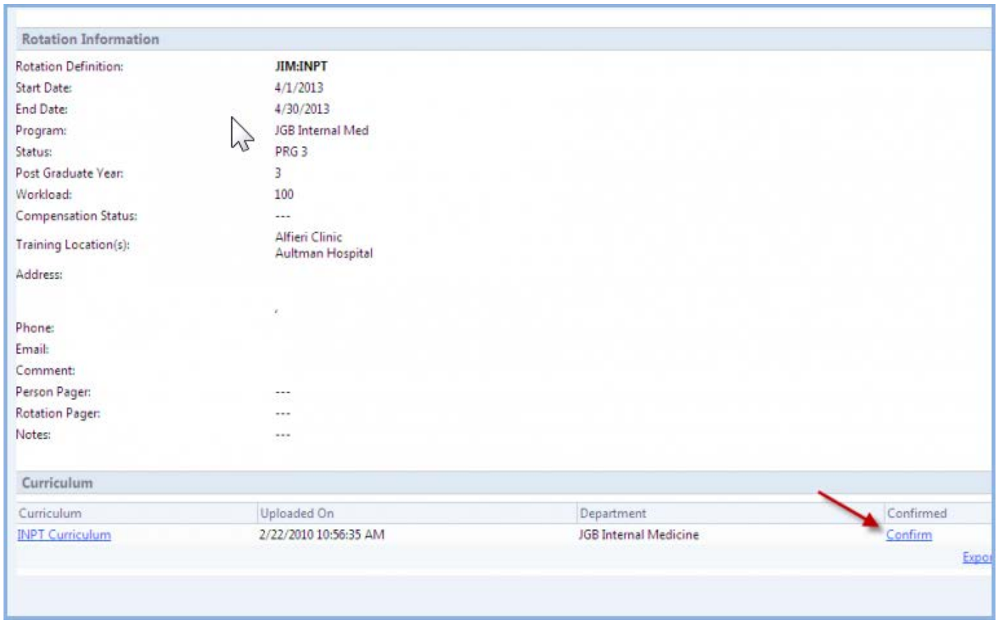
Person: Sherman, Daria Academic Year: 2012-2013

Sherman, Daria - 7/1/2012 to 6/30/2013

Department	Division	Start Date	End Date	Rotation	Primary	Curriculum	Status	PGY	Program	Notes
JGB Internal Medicine		7/1/2012	7/31/2012	JIM:AMB		0 of 1 confirmed	PRG 3	3	JGB Internal Med	
Anesthesiology		8/1/2012	8/31/2012	ANES:ANES		None	PRG 3	3	JGB Internal Med	
AKW Department of Medicine	AKW Gastro	9/1/2012	9/30/2012	AKW: DM: GASTRO: GASTRO		None	PRG 3	3	JGB Internal Med	
Pediatrics		10/1/2012	10/31/2012	PED:NEO:NWBORN		None	PRG 3	3	JGB Internal Med	
JGB Internal Medicine		11/1/2012	11/30/2012	JIM:WARD - 1		None	PRG 3	3	JGB Internal Med	
JGB Internal Medicine		12/1/2012	12/31/2012	JIM:WARD - 2		None	PRG 3	3	JGB Internal Med	
JAS Surgery		1/1/2013	1/31/2013	JIM:WARD - 3		0 of 1 confirmed	PRG 3	3	JGB Internal Med	
JGB Internal Medicine		2/1/2013	2/28/2013	JIM:AMB		0 of 1 confirmed	PRG 3	3	JGB Internal Med	
JGB Internal Medicine		3/1/2013	3/31/2013	JIM:CONSULTS		0 of 1 confirmed	PRG 3	3	JGB Internal Med	
JGB Internal Medicine		4/1/2013	4/30/2013	JIM:INPT		0 of 1 confirmed	PRG 3	3	JGB Internal Med	
JGB Internal Medicine		5/1/2013	5/31/2013	JIM:MICU		None	PRG 3	3	JGB Internal Med	
Department of Surgery	SURG-General Surgery	6/1/2013	6/30/2013	DS:SURG:NF		None	PRG 3	3	JGB Internal Med	

Export to Excel

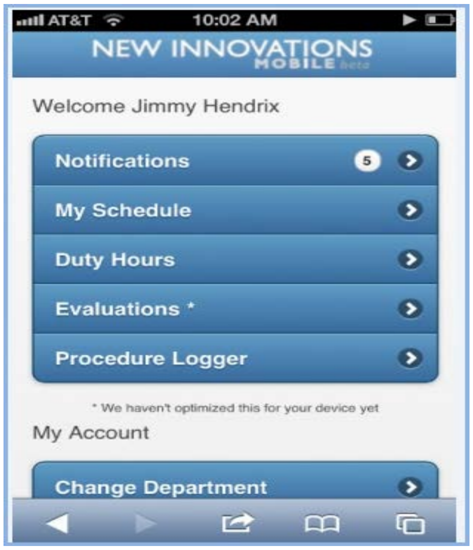
4. Open the document and read.
5. Click **Confirm**.



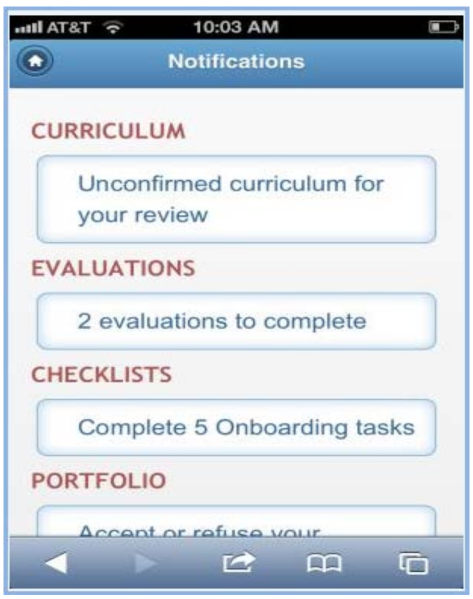
TRAINEE VIEWING/CONFIRMING CURRICULUM ON MOBILE DEVICE

1. Enter www.new-innov.com.
2. Enter your institution (mmcgme), username, and password.
3. Tap **Log In**.

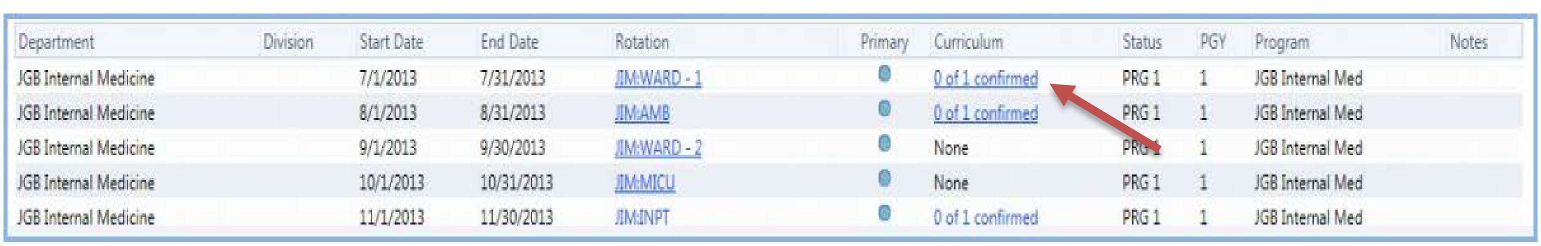
4. The mobile menu will appear on your screen.
5. Tap **Notifications**.



6. Tap **Unconfirmed curriculum for your review**.



7. Tap **0 of 1 confirmed** (for example), open the curriculum document to read, and then tap **Confirm**.

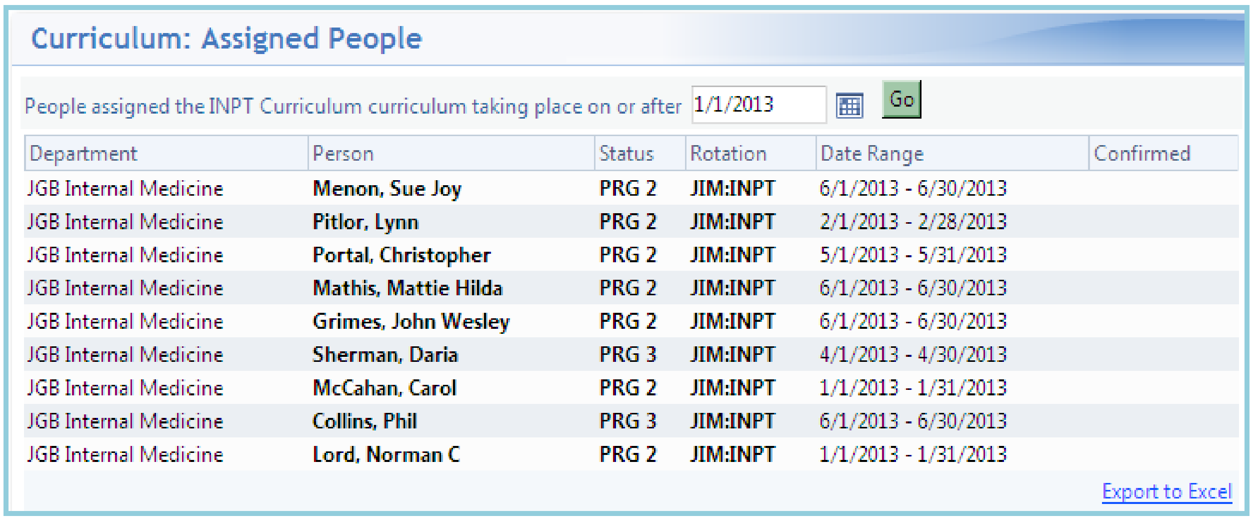


Department	Division	Start Date	End Date	Rotation	Primary	Curriculum	Status	PGY	Program	Notes
JGB Internal Medicine		7/1/2013	7/31/2013	JIM:WARD - 1		0 of 1 confirmed	PRG 1	1	JGB Internal Med	
JGB Internal Medicine		8/1/2013	8/31/2013	JIM:AMB		0 of 1 confirmed	PRG 1	1	JGB Internal Med	
JGB Internal Medicine		9/1/2013	9/30/2013	JIM:WARD - 2		None	PRG 1	1	JGB Internal Med	
JGB Internal Medicine		10/1/2013	10/31/2013	JIM:MICU		None	PRG 1	1	JGB Internal Med	
JGB Internal Medicine		11/1/2013	11/30/2013	JIM:INPT		0 of 1 confirmed	PRG 1	1	JGB Internal Med	

GENERATING CURRICULUM REPORTS

ASSIGNED PEOPLE REPORT

1. Go to *Schedules > Curriculum*.
2. Click **Assigned People**.
3. Select a date.
4. Click **Go**.



Curriculum: Assigned People

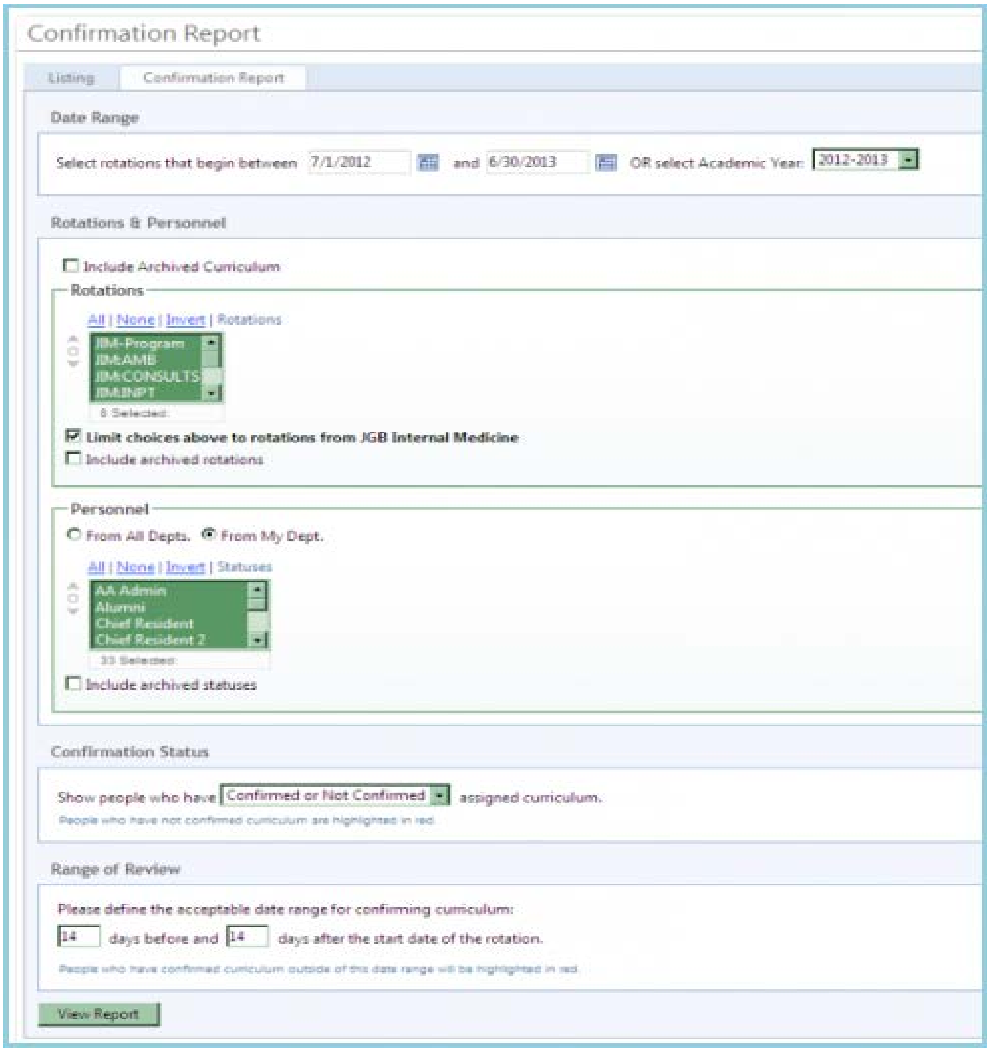
People assigned the INPT Curriculum curriculum taking place on or after 1/1/2013 Go

Department	Person	Status	Rotation	Date Range	Confirmed
JGB Internal Medicine	**Menon, Sue Joy**	**PRG 2**	**JIM:INPT**	6/1/2013 - 6/30/2013	
JGB Internal Medicine	**Pitlor, Lynn**	**PRG 2**	**JIM:INPT**	2/1/2013 - 2/28/2013	
JGB Internal Medicine	**Portal, Christopher**	**PRG 2**	**JIM:INPT**	5/1/2013 - 5/31/2013	
JGB Internal Medicine	**Mathis, Mattie Hilda**	**PRG 2**	**JIM:INPT**	6/1/2013 - 6/30/2013	
JGB Internal Medicine	**Grimes, John Wesley**	**PRG 2**	**JIM:INPT**	6/1/2013 - 6/30/2013	
JGB Internal Medicine	**Sherman, Daria**	**PRG 3**	**JIM:INPT**	4/1/2013 - 4/30/2013	
JGB Internal Medicine	**McCahan, Carol**	**PRG 2**	**JIM:INPT**	1/1/2013 - 1/31/2013	
JGB Internal Medicine	**Collins, Phil**	**PRG 3**	**JIM:INPT**	6/1/2013 - 6/30/2013	
JGB Internal Medicine	**Lord, Norman C**	**PRG 2**	**JIM:INPT**	1/1/2013 - 1/31/2013	

Export to Excel

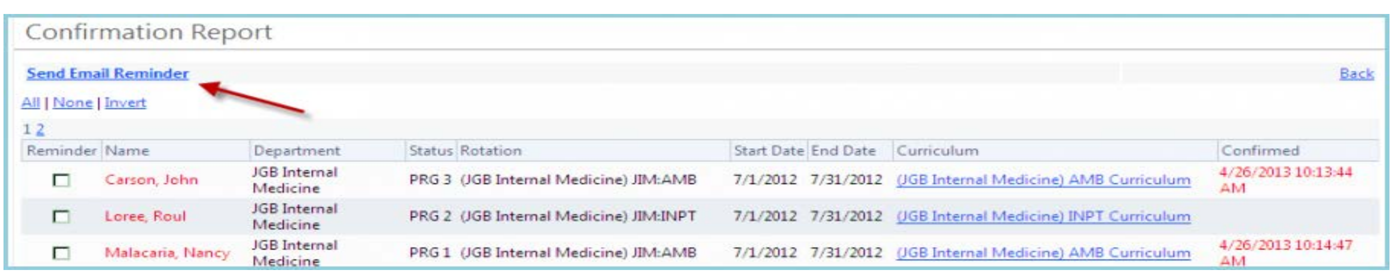
CONFIRMATION REPORT

1. Go to *Schedules > Curriculum* and then the Confirmation Report tab.
2. Specify the date range OR select an academic year.
3. Under **Rotations**, select the rotation(s) from the provided list.
4. Under **Personnel**, select the status(es) from the provided list.
5. Under **Confirmation Status**, select to view one of the following:
   - Confirmed or Not Confirmed
   - Confirmed
   - Not Confirmed
6. Define the date range of review considered acceptable in the provided fields:
   ___ days before and ___ days after the start date of the rotation.
7. Click **View Report**.



NOTES:

- The Confirmation Report displays people's names in red who have not read curriculum assigned or have read and confirmed their curriculum outside the specified acceptable date range.
- Send an email to people who have not read curriculum:
    - Check the box next to their name.
    - Click **Send Email Reminder** to send the email. *Note*: Emails will not be sent to those addresses marked as 'Private.'



Procedure Logger

NEW INNOVATIONS (RMS)

MMCGME Services

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SUPERVISION OF RESIDENTS

ACGME

According to the ACGME Common Program Requirements (CPR), the program must demonstrate that the appropriate level of supervision is in place for all residents who care for patients. It is the resident's responsibility to know at what level he or she is allowed to participation in patient care.

VI.D.5.a) Each resident must know the limits of his/her scope of authority, and the circumstances under which he/she is permitted to act with conditional independence.

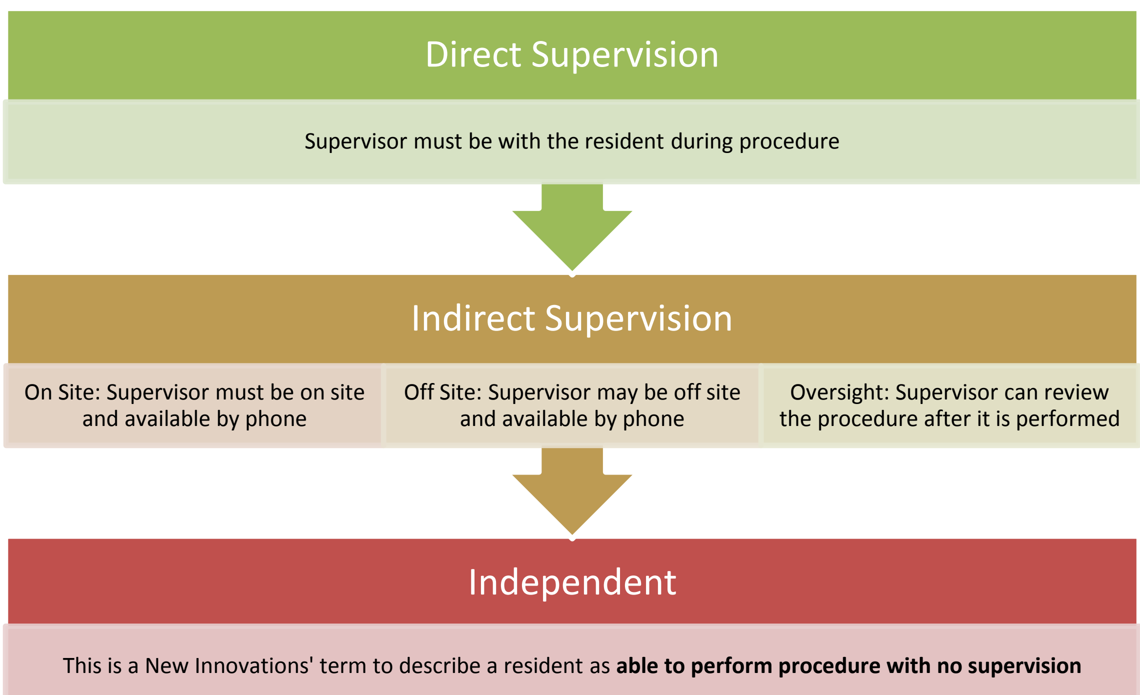
ACGME CPR

AOA

Our research does not find similar requirements in the AOA language. This does not preclude the use of this feature for AOA programs.

LEVELS OF SUPERVISION

The different levels of supervision outline how the resident is to be monitored during patient care encounters. The ACGME has established the following guidelines for levels of supervision in Section VI.D.3 of the Common Program Requirements.



AUTOMATIC CREDENTIALING

New Innovations offers an automatic credentialing feature within the Procedure Logger module. Your residents and fellows can be automatically credentialed to perform procedures independently once they meet the goals set by you for each procedure. This is an optional feature, but if you would like to make use of this tool, here are the items that must be in place within the software. The detailed directions for each step are included in this handbook.

1. Configuration - Turn on the Automatic Privileging System
2. Procedures - Set goals for each procedure. (An entry must be made in the Oversight field.)
3. Roles - Create roles that count towards privileging goals.

CONFIGURATION

The Procedure Logger module requires some setup before the residents can log procedures. This guide provides detailed instructions on configuring the Procedure Logger module.

Go to *Logger > Configuration*

GENERAL TAB

Notifications

1. Resident/Supervisor E-Mail Alerts. Enable to have these emails automatically to:
   - Supervisors - notifying them they have a procedure to confirm.
   - Person who logged procedure - notifying them when procedures have been confirmed and not passed, refused, deleted and when they have reached a certain privilege in a procedure.
2. Allow Auto Login (No PDA) - Enable to permit supervisors to use auto-login.
3. Administrative E-Mail Alerts - Enable to cc administrators on all notifications and when a trainee has reached a privilege target.
4. Admin E-Mail Address(es) - Enter the mail address of the administrator to receive emails

Logging Options

1. Age/DOB Tracking - Choose to have either the date of birth (DOB) or chronologic age (Age) recorded
2. Logging Time Period - Limit when the trainee can record procedures by choosing a predetermined number of days from the dropdown list.
3. Diagnosis Entry - Choose either a dropdown list or text box, if diagnoses are to be recorded.

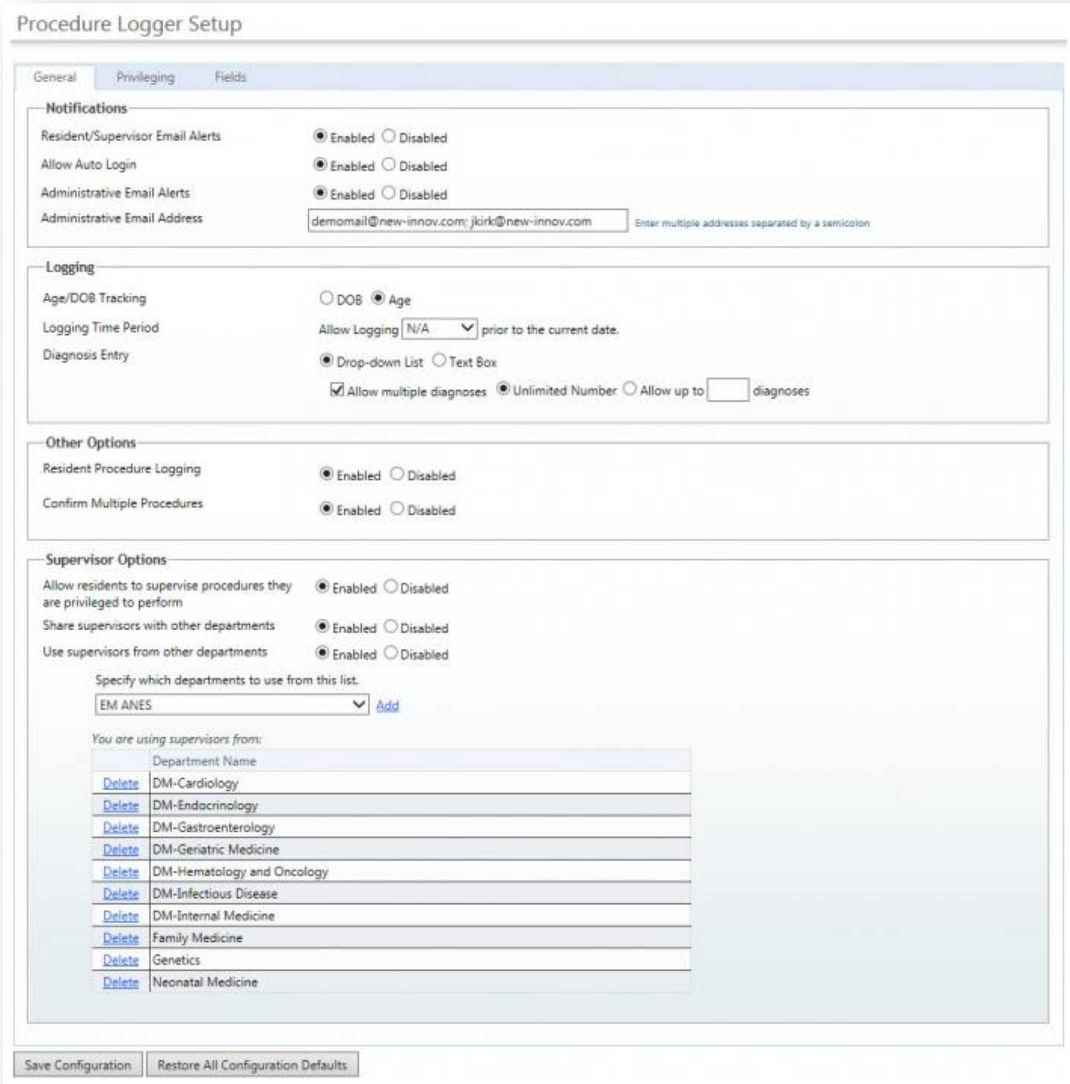
Other Options

1. Resident Procedure Logging - Enable to have trainees log their own procedures.

2. Mass Procedure Confirmation - Enable to allow supervisors to confirm all procedures on their Confirm Procedures page with a single click. Up to 50 procedures can be confirmed at one time.

Supervisor Options

1. Residents can supervise procedures they are privileged to perform. Enable to have trainees automatically appear on the supervisor list for procedures they are privileged to perform.
2. Share supervisors with other departments. Enable to have your department/division supervisors available for use in other departments.
3. Use supervisors from other departments. Enable to have supervisors from other departments/divisions available for use in your department/division. Only those departments that have shared their supervisors will appear in the list.
4. Specify which department to use
5. Click **Add**
6. Click **Save Configuration**



PRIVILEGING TAB

Privileging Access

Allow Department Administrators (level 5) to modify Privilege Options. Active only if permitted by the level 6 user.

- Yes - Administrator can change privileging options if Manual Privileging is selected.
- No - Administrators will not have additional setup options.

Privilege System

Select the type of privileging system you would like to implement:

1. Automatic -Select to have the system grant privileges according to the target numbers

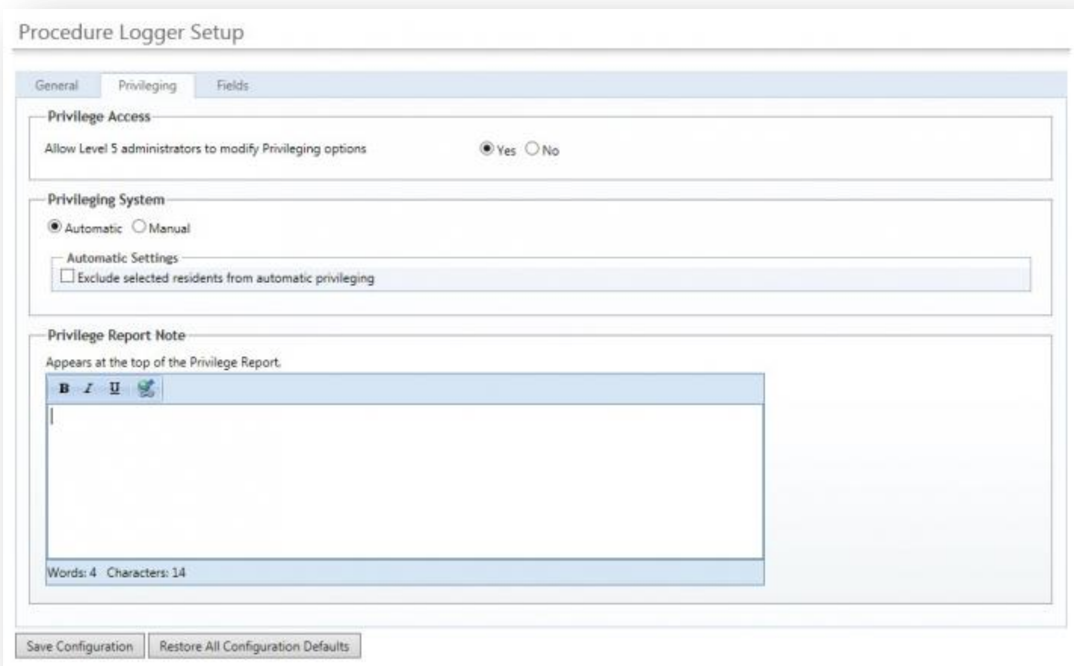
- Automatic Privileging Options
- Choose the Automatic radio button
- You may exclude specific residents from

2. Manual - Select to have privileges granted by a manual process

- Manual Privileging Options
- You may select Manual Privileging Options without using the Program Director option. If the PD option is not used, anyone with level 5 or 6 privileges can grant privileges.
- Permit only the Program Director to grant supervisor privileges. The program director must be listed in the Program Demographics in Administration > Global Setup > Programs.
- The date a person is privileged may be set to as many as ___ days prior to the current date becomes active.
- Apply the privileging options to the following Department/Divisions. Administrators can apply this rule to any departments/divisions where privileged.

Privilege Report Note

Enter a note that will appear at the top of the Privilege Report. (Optional)



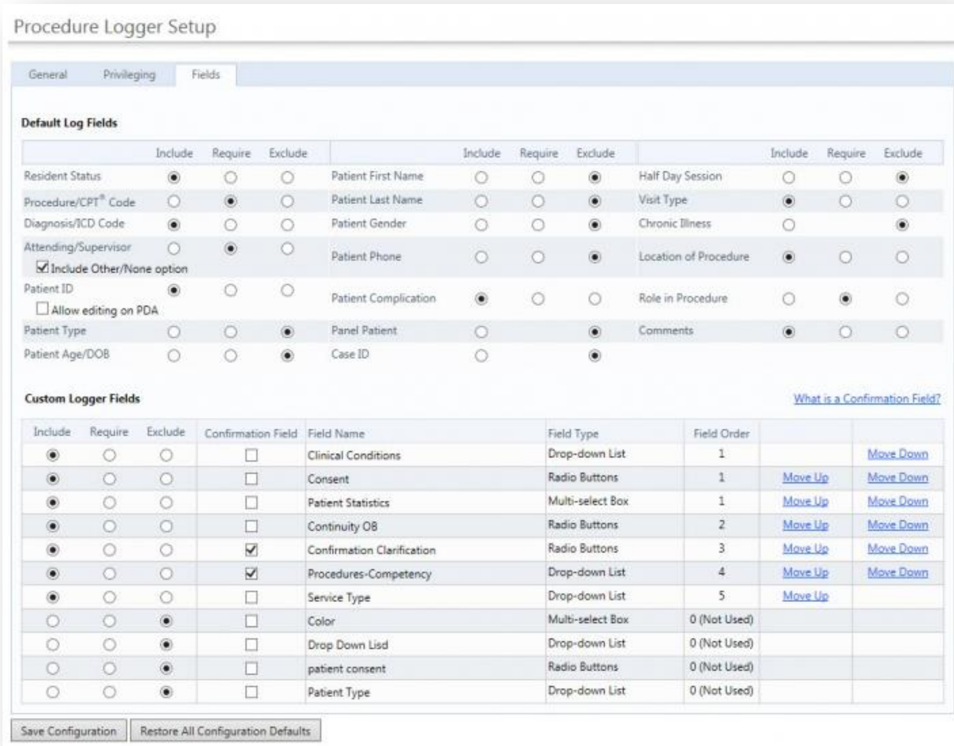
FIELDS TAB

Default Log Fields

1. For each field check:

- Include - Displays field on logging page, but is optional
- Make Required - Displays field on logging page. Field must be populated to save the log.
- Don't Include - Field does not display on logging page.

2. Click **Save Configuration**

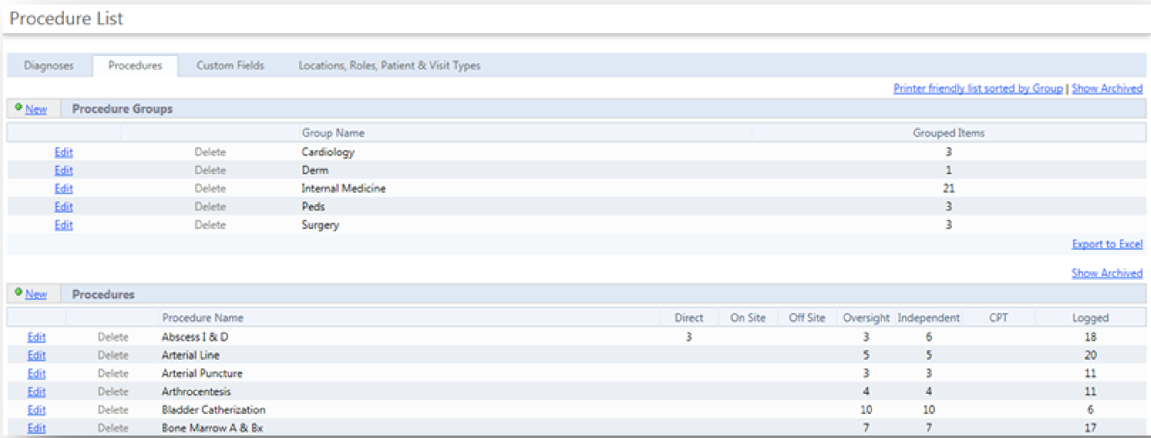


LISTS AND FIELDS

The next part of the configuration is creating the list of items that your residents and fellows can select from a drop-down list when entering a log. These may include procedures, diagnoses, locations, etc. You can also create Procedure Groups. Procedure Groups are an optional feature that can be used to organize large lists of procedures to make it easier for your residents and fellows to log their procedures.

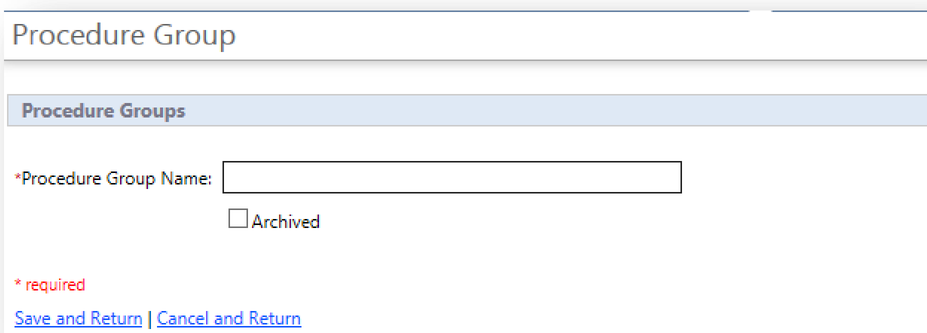
PROCEDURE LIST

Create the list of procedures performed by the residents and fellows in your program.



Configure a Procedure Group (Optional)

1. Go to *Logger > Lists & Fields*
2. Click **New** in Procedure Groups
3. Enter the **Procedure Group Name**
4. Click **Save and Return**



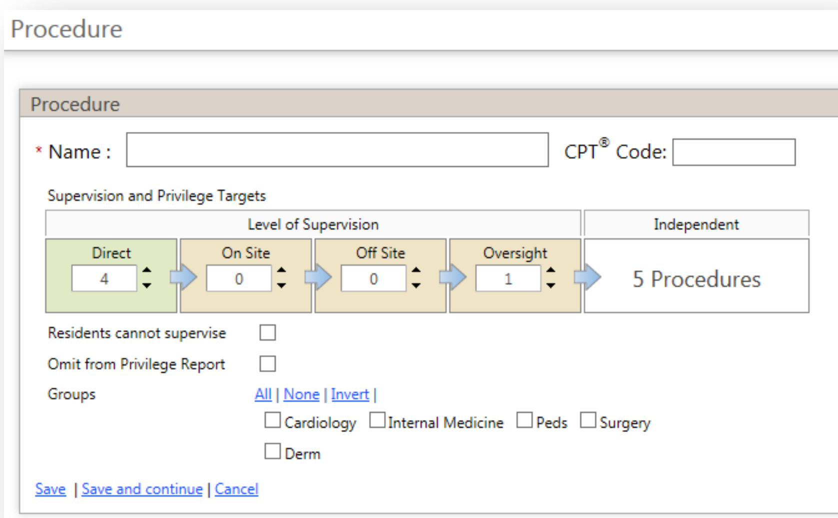
Configure a Procedure

1. Go to *Logger > Lists & Fields*
2. Click **New** in the Procedure section
3. Enter the procedure **Name**
4. Enter the **CPT Code** (optional)

5. **Supervision and Privilege Targets** - Enter the number of Direct, On-Site, Off-Site and Oversight procedures the resident will need to adequately perform to order to become Privileged on that procedure and work independently. The numbers entered in the various Levels of Supervision will be tabulated in the Independent box. **The Supervision and Privilege Targets** are explained below:

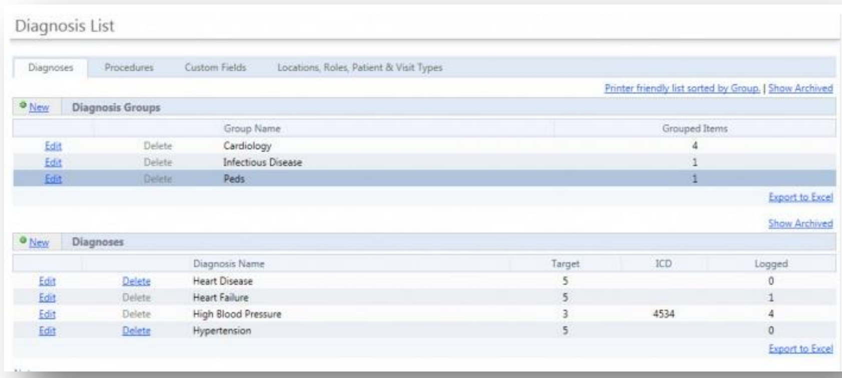
- Direct - Number of procedures that require a supervising physician to be physically present with the resident and patient.
- On Site -(Indirect Supervision) - Number of procedures that required a supervising physician to be physically within the hospital or other site of patient care and is immediately available to provide direct supervision.
- Off Site - (Indirect Supervision) - Number of procedures that require a supervising physician to be immediately available to provide direct supervision by means of remote communication.
- Oversight - (Indirect Supervision) - Number of procedures that require a supervising physician to provide review of procedures with feedback provided after care is delivered.
- Independent - Total number of procedures required to perform procedures without supervision. **Important Note**: If you are using the automatic privileging system, there must be a target number in the Oversight box.

6. Residents cannot supervise - Check the box if a resident cannot supervise this procedure, regardless of privileging level.
7. Omit from Privilege Report - Check the box if you don't want this procedure to appear on the reports
8. Groups - Check the appropriate box(es) to include this procedure in the group
9. Saving:
    - Click **Save** if you are only entering one procedure
    - Click **Save and Continue** to keep adding procedures to the list



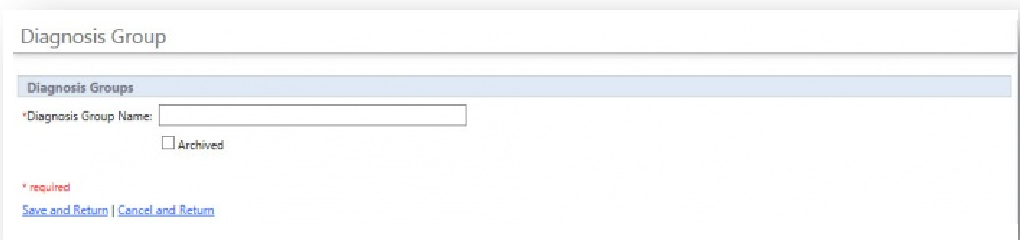
DIAGNOSIS LIST

A diagnoses list may be created in the software for your residents and fellows to use when logging procedures. Groups can be used to organize large lists of diagnoses to make it easier for your residents and fellows.



Configure Diagnosis Groups

1. Go to *Logger > Lists & Fields > Diagnosis tab*
2. Click **New** in Diagnosis Group
3. Enter the **Diagnosis Group Name**
4. Click **Save and Return**



Configure a Diagnosis

1. Go to *Logger > Lists & Fields > Diagnoses tab*
2. Click **New** in Diagnoses
3. Enter the Diagnosis **Name**
4. Enter the **ICD Code** (Optional)
5. **Target** - Enter the number of diagnoses a resident must log and have confirmed to be privileged
6. **Groups** - Check the box for the appropriate group
7. Click **Save** when finished building the list
8. Click **Save and Continue** to continue adding diagnoses to the list

LOCATIONS LIST

The list of locations created here will provide a drop-down list for residents and fellows to select telling where they saw the patient.

1. Go to *Logger > Lists and Fields*
2. Click the **Locations, Roles, Patient and Visit Types** tab
3. In the Locations area, click **New**
4. Enter the name of your location
5. Enter the order that this location should be in the list (optional)
6. Click **Save and Return**

ROLES LIST

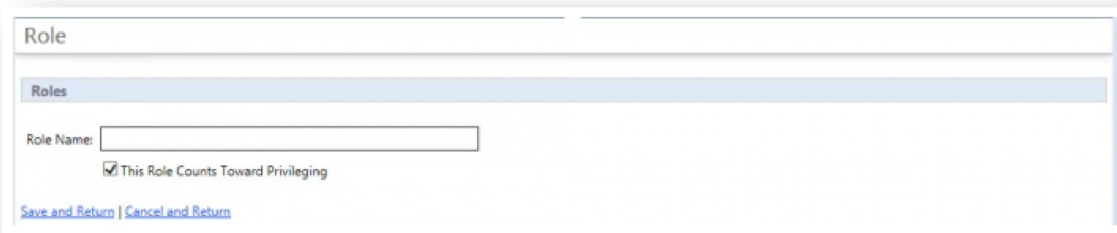
The list of roles created here will provide a drop-down list for residents and fellows to select telling what role they performed in this procedure. This is a required field if you are using the automatic credentialing option. Only those roles that are designated to count towards privileging will add to a resident's count towards performing that procedure independently.

New	Roles		
		Role Name	Counts Toward Privileging
Edit	Delete	Assisted	
Edit	Delete	Observed	
Edit	Delete	Performed	●

Export to Excel

Create Roles

1. Go to *Logger > Lists and Fields*
2. Click the **Locations, Roles, Patient and Visit Types** tab
3. In the Roles area, click **New**
4. Enter the role (Note: Common examples would be Observed, Assisted and Performed)
5. Check the box if **This Role Counts Toward Privileging** (Note: Be sure to check the box for Performed, and possibly Assisted.)
6. Click **Save and Return**



PATIENT TYPES LIST

The list of patient types created here will provide a drop-down list for residents and fellows to select telling what type of patient they saw.

Some examples of patient types may be:

- Pediatric, Adult and Geriatric
- Inpatient and Outpatient

New	Patient Types		
		Patient Type Name	Logged
Edit	Delete	Adult	2
Edit	Delete	Geriatric	0
Edit	Delete	Infant	0
Edit	Delete	Pediatric	0

Export to Excel

1. Go to *Logger > Lists and Fields*
2. Click the **Locations, Roles, Patient and Visit Types** tab
3. In the Patient Types area, click **New**
4. Enter the type of patient
5. Click **Save and Return**

VISIT TYPES

The list of Visit Types you create here will provide a drop-down list for residents and fellows to select telling what type of visit they had with the patient. Some examples of patient types may be:

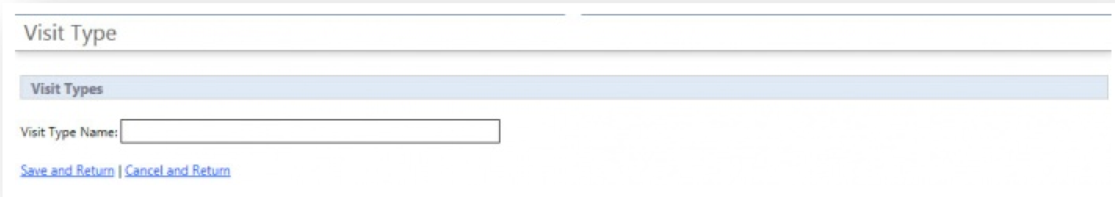
- Clinic
- Inpatient or Outpatient
- Pre-Natal or Well Baby
- Routine Check-up
- Emergency Room

New Visit Types

		Visit Type Name	Logged
Edit	Delete	Clinic - Walk-in	2
Edit	Delete	Clinic - With appointment	4
Edit	Delete	Emergency Room	0
Edit	Delete	ER - follow up	1
Edit	Delete	Prenatal	0
Edit	Delete	Well Baby	0

Export to Excel

1. Go to *Logger > Lists and Fields*
2. Click the **Locations, Roles, Patient and Visit Types** tab
3. In the Visit Types area, click **New**
4. Enter the type of visit
5. Click **Save and Return**

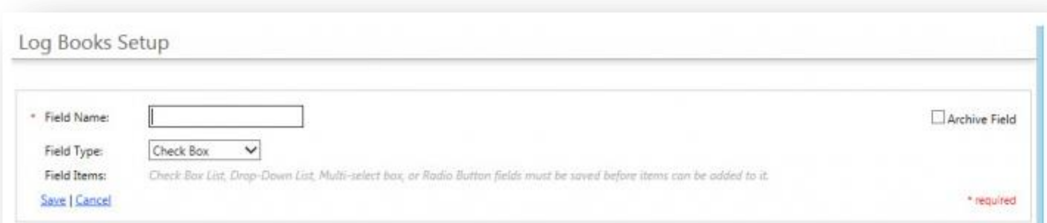


CUSTOM LOGGER FIELDS

You can create custom fields to capture data that is specific to your program. If you create a new field, be sure to include in on your form in the basic configuration, shown below.

Create a Custom Field

1. Go to *Logger > Log Books > Setup > Custom Fields tab*
2. Click **New**
3. Enter the name of the field
4. Field Type. Select the type and enter the items for the field.
    1. Check box – Check box is provided
    2. Date Box – Calendar is provided
    3. Radio Buttons – User may select only one option
    4. Text Box – User enters text
    5. Check Box List – User may select more than one check box
    6. Drop-down List – User may select one item from a dropdown list
    7. Multi-select Box – User may select more than one item from the list
5. Click **Save and Return**



If you selected the Check Box List, Dropdown Lists, Multi-select Boxes or Radio Buttons, here's how to build the list of items:

1. Enter the first item in the list in the text box
2. Click **Add New Item**
3. Continue until all items have been entered.
4. Move them up and down on the list in the order they should appear

5. Use the **Edit** and **Delete** links to change of delete an item

Add Custom Field to Your Form

1. Go to *Logger > Log Books > Setup > Custom Fields tab*
2. Click **New** to create a new Log Book or **Edit** to add the custom field to an existing Log Book
3. Scroll down to Custom Logger Fields
4. Click to **Include** the custom field or **Make Required**
5. Click **Save and Return**

ACGME IMPORT

The ACGME Import tool is used to import logs from the ACGME Resident Case Log System into New Innovations. Once cases are imported, users can then take advantage of the tools and features in New Innovations to view, manage, and report on this data.

Required Administrator Access

- Administrators with level 5 or 6 access to the Procedure Logger can use the ACGME Import tool.

Generating ACGME Data File for Import

- The data is imported from a tab-delimited text file created on the ACGME website.

Notes about the Process:

- Since the import restriction on file size is 12 Megabytes, you may need to adjust your date range and generate multiple files for download. ACGME Procedure Export Lists display the file size in kilobytes (1 MB=1,024 kilobytes).

- The system can be configured to notify you by email when the import is complete.

- If a procedure does not exist in New Innovations, it will be imported, but will not count toward privileging targets.

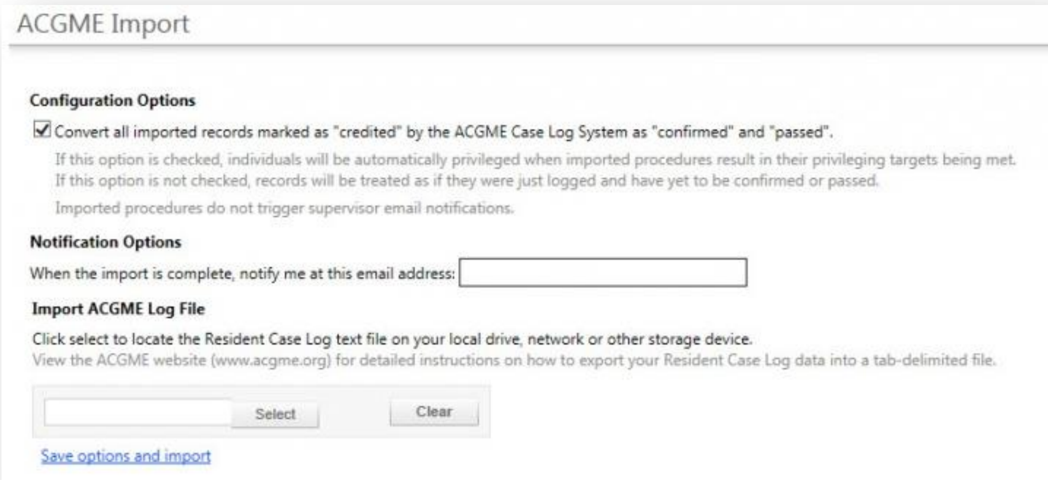
- When Manual Privileging is set up, imported procedures that cause a privileging target to be met will trigger email notifications to administrators. This may cause the system to send multiple emails the administrator identified on the configuration page.

- Imported Procedures do not trigger supervisor email notifications even if supervisor email notifications are configured in Setup > Configuration.

Import Logs

Some programs are required to log procedures using the ACGME web site case logger. This guide instructs users how to import those records into New Innovations for more variety in reporting. The file of logs to import from the ACGME site must be downloaded from the ACGME website (instructions can be found on the ACGME website)

1. Go to *Logger > Setup > ACGME Import*
2. Choose the Configuration option, if applicable, to convert all records marked as “credited” by the ACGME case log website to “confirmed and passed” in the RMS.
3. Enter the email address to be notified when a large import is completed
4. Browse for the file on your computer. The file must be a tab-delimited text file (.txt) and must be smaller than 10 megabytes (mb). If the file is larger than 10mbs, go back to the file and divide it into smaller sections to import.
5. Click **Save Options and Import** to upload the file from your computer and import the case logs. Logs that imported successfully are listed on a separate report.
6. Logs that failed to import successfully are listed with a code that describes why they were not able to be imported.



Troubleshooting ACGME Case Log Import Issues

If you experience problems importing case logs, please refer to this chart for possible solutions.

Log has already been imported	Identical Log already present in the system	No correction necessary
No Code	The CPT or ICD9 Code is missing from the Case Log Text File	Enter missing CPT or ICD9 Codes in the Case Log Text File and import into New Innovations again or enter missing CPT or ICD9 Codes in the ACGME Case Log System, generate another Case Log Text File, and then import the corrected Case Log Text File into NI.
No Code	The CPT or ICD9 Code is missing from the Case Log Text File	Enter missing CPT or ICD9 Codes in the Case Log Text File and import into New Innovations again or enter missing CPT or ICD9 Codes in the ACGME Case Log System, generate another Case Log Text File, and then import the corrected Case Log Text File into NI.
Date is invalid or there is no date	The Procedure Date in the Case Log Text File is missing or entered in an unacceptable format	The Date must be in MM/DD/YYYY format (e.g., May 7, 2011 must be entered as 5/7/2011). Correct the Case Log Text File and then import the corrected file into NI or correct the error in the ACGME Case Log System, generate another Case Log Text File, and then import the corrected file into NI.
Resident not found in system	The resident associated with the Procedure in the Case Log Text File is not found in NI	The last name or Social Security number does not match any last names or Social Security numbers assigned to any person in NI. Try the appropriate action: • Add the person to NI and then import the Case Log Text File again • Correct the person's last name and/or Social Security number in NI and then import the Case Log Text File into NI again • Correct the last name and/or Social Security number in the Case Log Text File (so that both are consistent with what has been entered into NI) and then import the corrected file. • Correct the last name and/or Social Security number in the ACGME Case Log System, generate another Case Log Text File, and then import the corrected Case Log Text file into NI.
Attending not found in system	The attending associated with the procedure is not found in NI. His or her last name or Social Security number does not match any Last names or Social Security numbers assigned to any person in NI.	Try the appropriate action: • Add the person to NI and then import the Case Log Text File again • Correct the person's last name and/or Social Security Number in NI and then import the Case Log Text File into NI again • Correct the last name and/or Social Security number in the Case Log Text File (so that both are consistent with what has been entered into NI) and then import the corrected file. • Correct the last name and/or Social Security number in the ACGME Case Log System, generate another Case Log Text File, and then import the corrected Case Log Text file into NI
Missing role configured as 'Required' in NI	The role is missing from Case Log Text File, but it is configured as required in NI	Change your configuration in NI so that a Role is not required (go to Setup > Configuration and select the Include option). Generate a new ACGME file and import it or add the missing role in the Case Log Text File and then import the corrected file into RMS. Add the missing role in the ACGME Case Log System, generate another Case Log Text File, and then import the corrected Case Log Text File into NI
Missing Patient Type, configured as 'Required' in NI	Patient type is missing from Case Log Text File, but it is configured as required in NI.	Change your configuration in NI so that a patient type is Not required (go to Setup > Configuration and select the Include option). Generate a new ACGME file and import it or add the missing patient type in the Case Log Text File and then import the corrected file into NI. Add the missing patient type in the ACGME Case Log System, generate another Case Log Text File, and then import the corrected Case Log Text File into NI.

MANAGE PROCEDURE LOGS

Administrators and residents/fellows can manage the list of procedures. If a procedure has not been confirmed, the procedure can be deleted or edited by both the administrator and the resident. If a procedure has been confirmed, it can not be edited by anyone. However, a confirmed procedure can be deleted by an administrator allowing the resident to re-enter the procedure correctly.

VIEW / EDIT / DELETE PROCEDURES

Two views are provided below - one from the administrator's perspective and the other from the resident's perspective. See the list below for explanations of the icons.

1. Administrator View - *Go to Logger > View Procedures*

2. Resident/Fellow View - Go to *Logger > Procedures > View tab*

Icons

- Edit - Click the pencil to edit this unconfirmed procedure.
- Delete - Click the red X to delete this procedure.
- View - Click the magnifying glass to view this confirmed procedure. These procedures can not be edited or deleted by the resident. The procedure can be deleted by an administrator.

Other Options

- Click **All Dates** to edit the date range
- Click **Filters** to change the logs based on procedure and supervisor
- Click **Columns** to add or remove columns from your view
- Click **Add Procedure** to add a new procedure to the list
- Click any column header to sort the data by that column

Restore, or Permanently Delete, a Deleted Log

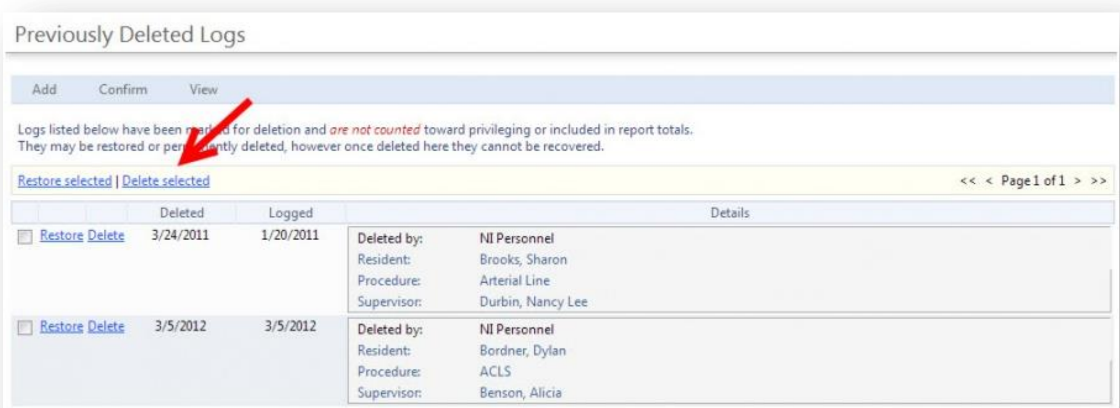
When a log has been deleted from the view page, it is moved to a general list of deleted procedures. It is kept until an administrator permanently removes it from the database. If the log has been deleted in error, it can be restored to the resident's list of procedures by an administrator.

Restore a Deleted Procedure

1. Go to *Logger > View Procedures*
2. Click **View Deleted**
3. Click **Restore** if front of a specific procedure. If there are several to restore, check the boxes in front of the procedures, then click **Restore selected.**

Permanently Delete a Procedure

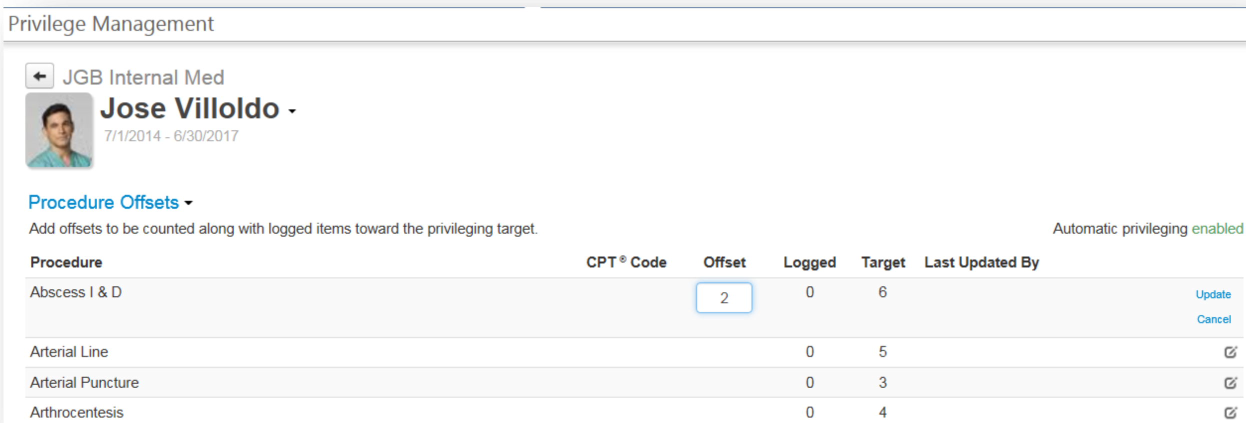
1. Go to *Logger > View Procedures*
2. Click **View Deleted**
3. Click **Delete** if front of a specific procedure. If there are several to delete, check the boxes in front of the procedures, then click **Delete selected.**



ADD OFFSETS

Sometimes you need to give a resident or fellow credit for procedures they have performed before using New Innovations. Offsets are used to record these procedures. They can also be used to correct the number of successful procedures a resident has performed.

1. Go to *Logger > Manage*
2. Click the **Overview** tab
3. Click on the resident
4. Click on the arrow beside 'Privileges' and select **Procedure Offsets**
5. Click on the edit icon to the far right of a procedure
6. Enter the number of procedures the trainee has already successfully performed in the Offset column
7. Click **Update**

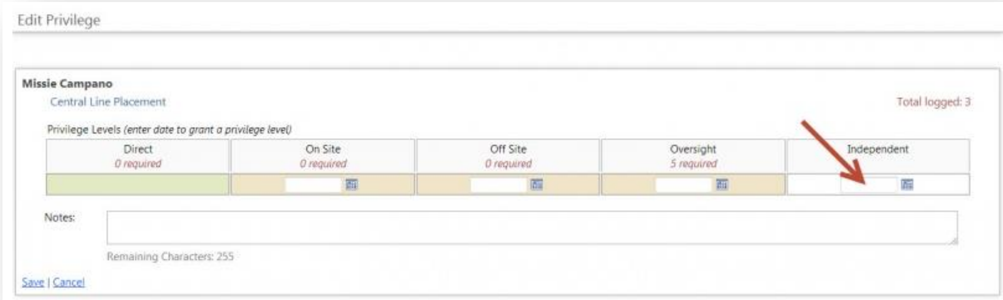


ADD MANUAL PRIVILEGES

You can manually give Independent privileges to a resident or fellow, or a group of trainees, on a particular procedure.

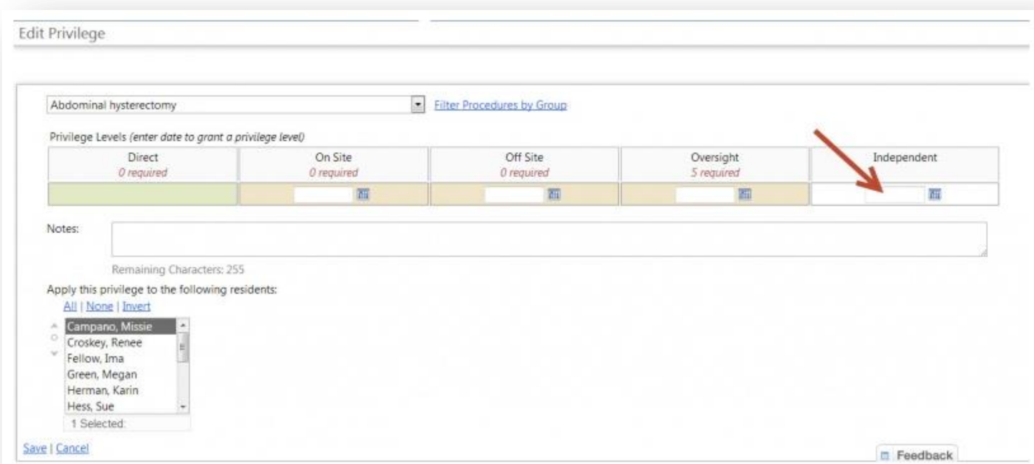
Add a Privilege to One Trainee

1. Go to *Logger > Add Privileges*
2. Click the **Privileges** tab
3. Click **Edit** in front of the procedure
4. In the Independent date box, enter the date that the trainee gained their privilege level
5. Click **Save**



Add Privileges to Group of Trainees

1. Go to *Logger > Add Privileges*
2. Click the **Privileges** tab
3. Click **Add privileges for multiple residents**
4. Select the procedure
5. In the Independent date box, enter the date that the trainees gained their privilege level
6. Select the residents. Hold down the Control key to select multiple names.
7. Click **Save**

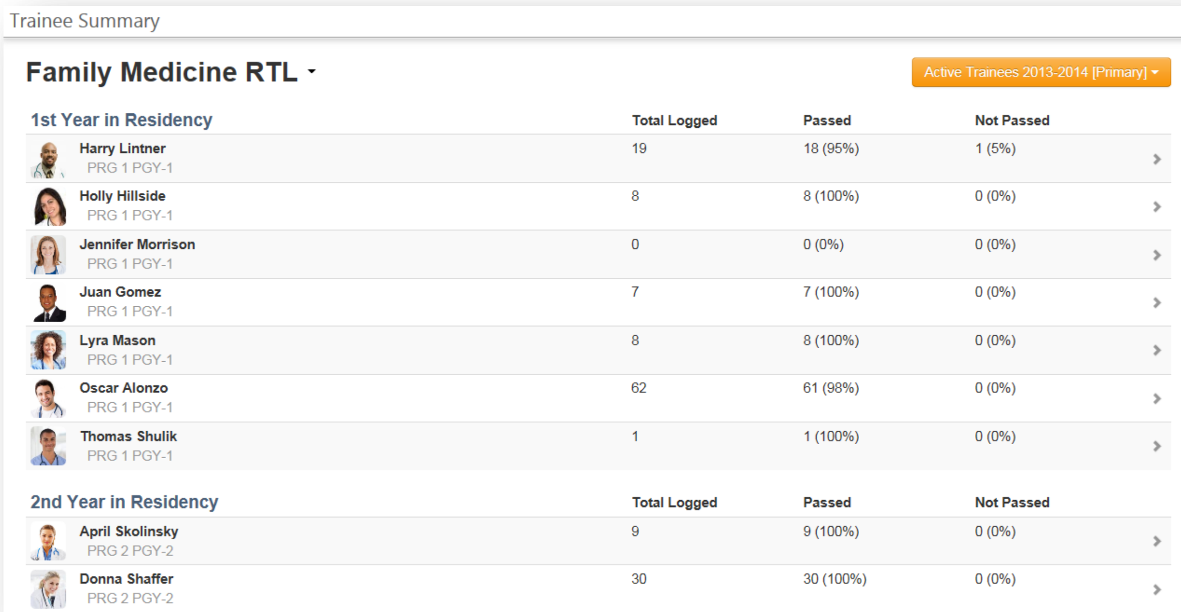


PROCEDURE LOGGER REPORTS

TRAINEE SUMMARY REPORT

Our new Procedure Logger reports allow you to view a complete record of procedures logged in your program for current and past residents. View your residents by training year, plus drill down to find the details for each resident and procedure. Residents must have a Training Record in their Personnel file to appear on this report.

1. Go to *Logger > Reports > Resident Reports*
2. Click **Trainee Summary**. The report will default to a list of your current trainees grouped by 'Year in Residency.'


Trainee Summary

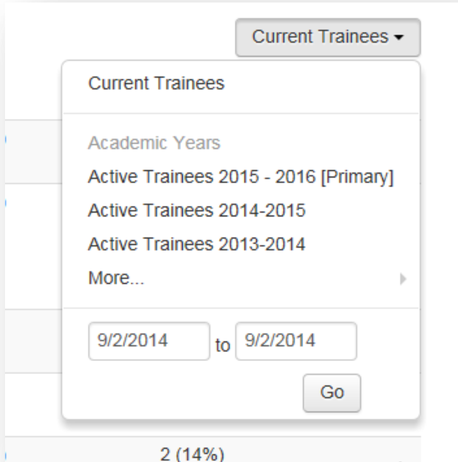
Family Medicine RTL

Active Trainees 2013-2014 [Primary]

1st Year in Residency	Total Logged	Passed	Not Passed
Harry Lintner PRG 1 PGY-1	19	18 (95%)	1 (5%)
Holly Hillside PRG 1 PGY-1	8	8 (100%)	0 (0%)
Jennifer Morrison PRG 1 PGY-1	0	0 (0%)	0 (0%)
Juan Gomez PRG 1 PGY-1	7	7 (100%)	0 (0%)
Lyra Mason PRG 1 PGY-1	8	8 (100%)	0 (0%)
Oscar Alonzo PRG 1 PGY-1	62	61 (98%)	0 (0%)
Thomas Shulik PRG 1 PGY-1	1	1 (100%)	0 (0%)

2nd Year in Residency	Total Logged	Passed	Not Passed
April Skolinsky PRG 2 PGY-2	9	9 (100%)	0 (0%)
Donna Shaffer PRG 2 PGY-2	30	30 (100%)	0 (0%)

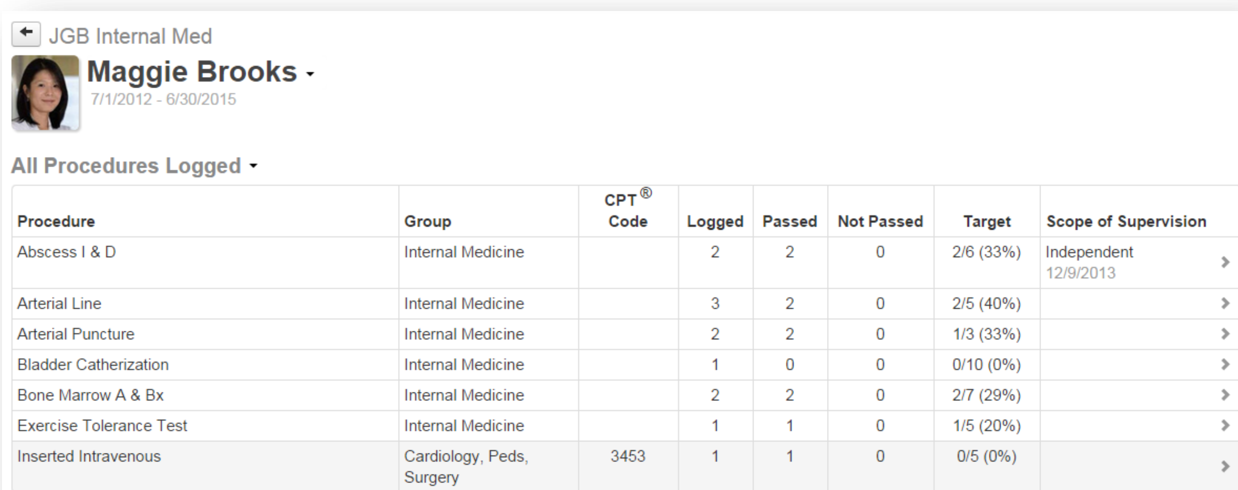
3. Click **Current Trainees** to select a different academic year.



Note: Selecting a different academic year will only change the list of trainees, not the data shown. The trainees who were current during any part of the academic year selected will be displayed. Selecting a different academic year does not filter the data, only the list of trainees who were considered 'Active' during that time period.

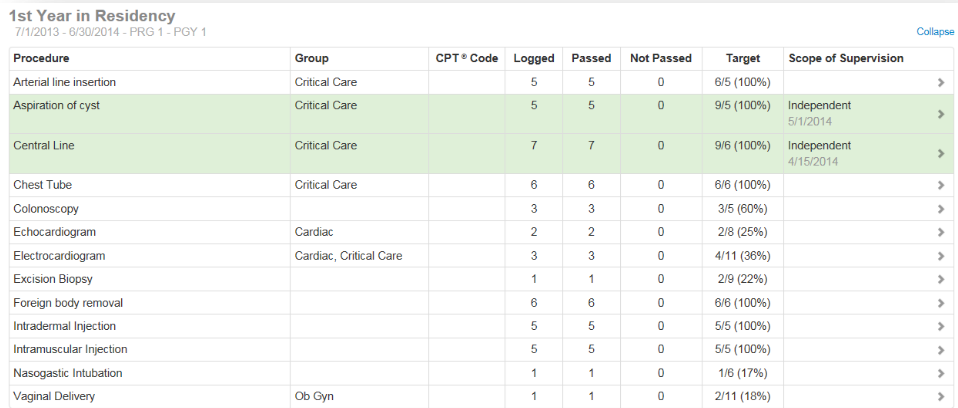
4. Click the name of one of the trainees to display the details about all of the procedure logs made by that resident. When the resident has met the target for a procedure it is shown in green.

The procedures can be sorted by Group also. Click **All Procedures Logged** and select one of your Groups. Only those procedures belonging to that Group will be displayed. Click **All Procedures Logged** again to return to the full list of procedures for that resident.



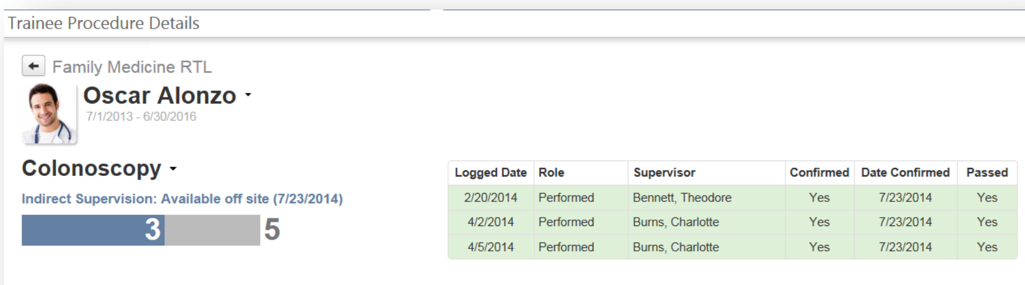
Procedure	Group	CPT® Code	Logged	Passed	Not Passed	Target	Scope of Supervision
Abscess I & D	Internal Medicine		2	2	0	2/6 (33%)	Independent 12/9/2013
Arterial Line	Internal Medicine		3	2	0	2/5 (40%)	
Arterial Puncture	Internal Medicine		2	2	0	1/3 (33%)	
Bladder Catherization	Internal Medicine		1	0	0	0/10 (0%)	
Bone Marrow A & Bx	Internal Medicine		2	2	0	2/7 (29%)	
Exercise Tolerance Test	Internal Medicine		1	1	0	1/5 (20%)	
Inserted Intravenous	Cardiology, Peds, Surgery	3453	1	1	0	0/5 (0%)	

5. At the bottom of the screen, click on a **Year in Residency** (or Fellowship) to view the details about the logs entered during that specific time period. When the resident has met the target for a procedure it is shown in green. Click **Collapse** to hide the details.


1st Year in Residency
7/1/2013 - 6/30/2014 - PRG 1 - PGY 1
Collapse

Procedure	Group	CPT® Code	Logged	Passed	Not Passed	Target	Scope of Supervision
Arterial line insertion	Critical Care		5	5	0	6/5 (100%)	
Aspiration of cyst	Critical Care		5	5	0	9/5 (100%)	Independent 5/1/2014
Central Line	Critical Care		7	7	0	9/6 (100%)	Independent 4/15/2014
Chest Tube	Critical Care		6	6	0	6/6 (100%)	
Colonoscopy			3	3	0	3/5 (60%)	
Echocardiogram	Cardiac		2	2	0	2/8 (25%)	
Electrocardiogram	Cardiac, Critical Care		3	3	0	4/11 (36%)	
Excision Biopsy			1	1	0	2/9 (22%)	
Foreign body removal			6	6	0	6/6 (100%)	
Intradermal Injection			5	5	0	5/5 (100%)	
Intramuscular Injection			5	5	0	5/5 (100%)	
Nasogastic Intubation			1	1	0	1/6 (17%)	
Vaginal Delivery	Ob Gyn		1	1	0	2/11 (18%)	

6. Click a specific procedure to view more details about the procedure logs.



Logged Date	Role	Supervisor	Confirmed	Date Confirmed	Passed
2/20/2014	Performed	Bennett, Theodore	Yes	7/23/2014	Yes
4/2/2014	Performed	Burns, Charlotte	Yes	7/23/2014	Yes
4/5/2014	Performed	Burns, Charlotte	Yes	7/23/2014	Yes

The details for that procedure include:

- A Progress Bar that displays the resident's progress towards the credentialing goal for this procedure
- A Chart that displays information about the specific procedures logged

PRIVILEGE REPORT

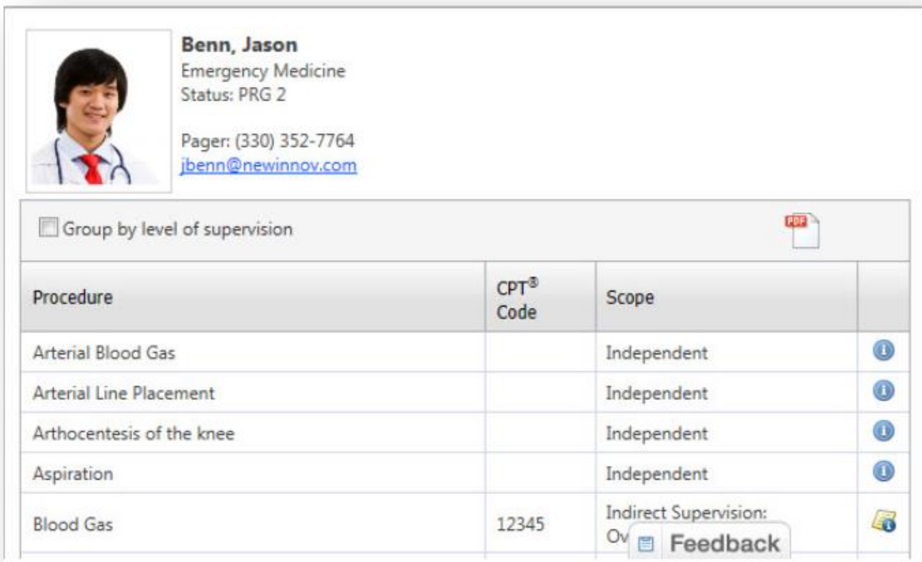
The Privilege Report can be used to verify the level of supervision required for residents when they perform certain procedures. Many institutions make this report available to hospital nurses by giving them level 1 access to the Procedure Logger module. People who have left your program and whose records are not archived and Post Training Chief status can be viewed as well.

1. Go to *Logger > Search*
2. Enter a resident's last name, CPT code, or procedure name in the text box
3. Click **Search**

4. Click the resident's name or the procedure to view privileges
5. Click **Find Personnel** or **Find Procedure** to access the entire list of residents or procedures.

Here are the levels of supervision as specified by the ACGME [Section VI.D.3 of the Common Program Requirements]:

- Direct Supervision: The supervisor must be with the resident during the procedure
- On Site: The supervisor must be on site and available by phone
- Off Site: The supervisor can be off site and available by phone
- Oversight: The supervisor reviews the procedure after it is performed
- Independent: The resident is able to perform a procedure without supervision



ADVISOR REPORT

The Advisor Report allows your faculty members designated as Advisors to view the procedures of their advisees. Advisors must be noted in each resident's Personnel record under Basic Information.

1. Go to *Logger > Advisor Report*
2. Select the resident(s)
3. Select the procedures(s)
4. Click **View Report**

Advisor Report

Jason Michael Benn

Emergency Medicine
Date Range: All Dates
Created: 6/28/2013 1:11:06 PM

Change Filters | < Barinito, Michael | Benn, Jason Michael | Craft, Sateesh Reddy >

Procedure Name	CPT® Code	Independent Target	Total Logged	% of Total Logged	Confirmed (Passed)	Confirmed (Not Passed)	% for Independent (Confirmed/Passed)	Total Refused
Arterial Blood Gas (Emergency Medicine)		10	20	100%	19	0	100%	0
Arterial Line Placement (Emergency Medicine)		5	5	100%	5	0	100%	0
Arthocentesis of the knee (Emergency Medicine)		3	6	100%	6	0	100%	0
Aspiration (Emergency Medicine)		1	5	100%	4	0	100%	0
Blood Gas (Emergency Medicine)	12345	5	4	80%	4	0	80%	0
Bone marrow aspirate/biopsy (Emergency Medicine)		5	6	100%	5	0	100%	0

SUPERVISOR REPORTS

The Supervisor Reports allow you to see a summary of how your Supervisors are doing with the procedures assigned to them for confirmation. The Supervisor Totals report displays both confirmed and unconfirmed procedures. Alerts can be sent to the Supervisors on the 'Unconfirmed Totals' report. Go to *Logger > Supervisor Reports* to view these reports:

Supervisor Totals Report

This report gives you a summary of the statistics of Supervisors in this Department/Division.

Supervisor Totals Report

Emergency Medicine
Date Range: All Dates
Created: 6/28/2013 1:16:31 PM
Return to Report Listing

Date Range
Show All Dates Specify Dates
From To

Adjust Report

Supervisor Name	Total	Total Confirmed	Total Unconfirmed	Passed	Not Passed	Refused
Andrews, Florence	39	29	10	28	11	1
Atkins, Chet	5	4	1	3	2	0
Bireau, Ande	4	3	1	3	1	0
Caputo, Eric	12	11	1	11	1	0
Clarkson, Holly	5	4	1	4	1	0

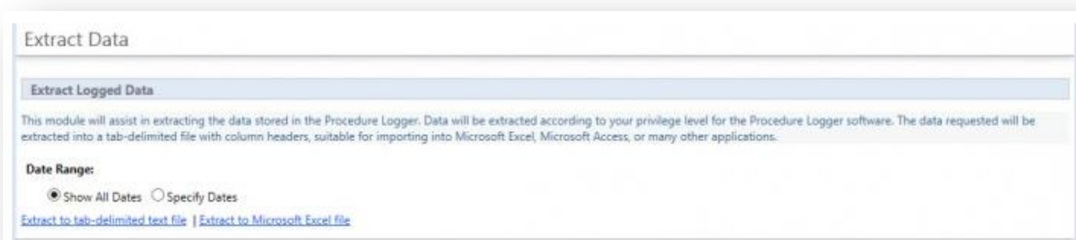
Unconfirmed Totals Report

This report provides a total of unconfirmed procedures by Supervisor in this Department/Division. You are able to send reminder emails from this report.

EXTRACT DATA

This report will allow you to extract the data stored in the Procedure Logger module. Data will be extracted according to your privilege level. The data requested will be extracted into a tab-delimited file or a Microsoft Excel file with column headers suitable for importing into Microsoft Access or many other applications.

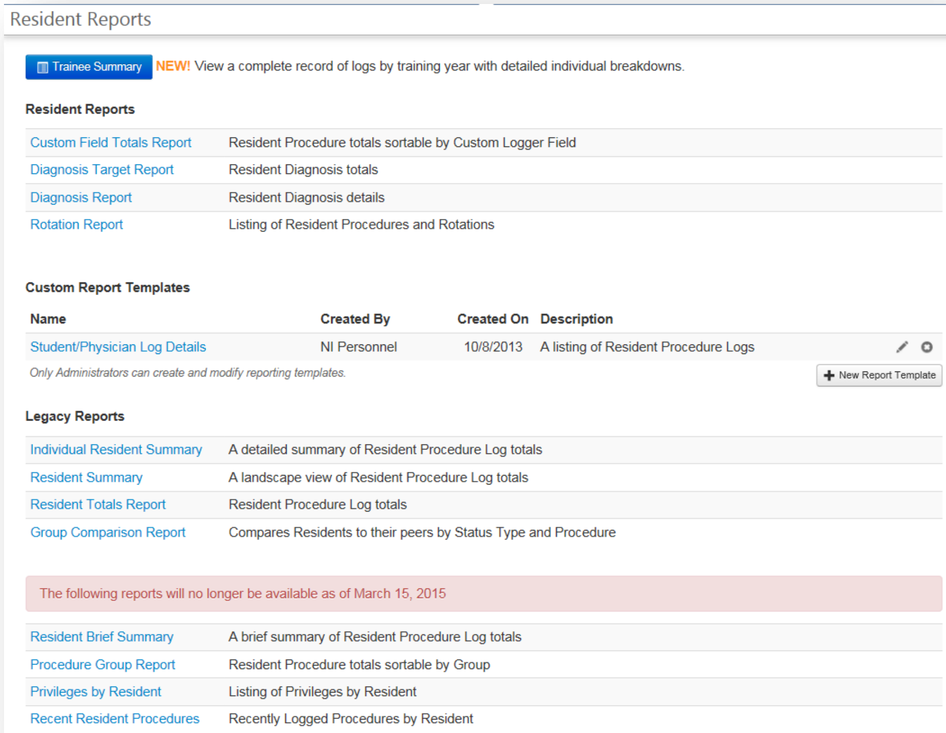
- Go to *Logger > Extract Data*
- Select a Date Range
- Select either:
- Extract to tab-delimited text file
- Extract to Microsoft Excel file
- Click **View Extracted Procedure Log Data**



OTHER RESIDENT REPORTS

The other Resident Reports include a variety of ways to view your procedure logger data.

1. Go to *Logger > Resident Reports*



RESIDENT REPORTS

Click on the report name to view these reports:

- Custom Field Totals Report - Resident Procedure Totals sortable by Custom Logger Field
- Diagnosis Target Report - Resident Diagnosis Totals
- Procedure Group Report - Resident Procedure Totals sortable by Group
- Rotation Report - Listing of Resident Procedures and Rotations

CUSTOM REPORT TEMPLATES

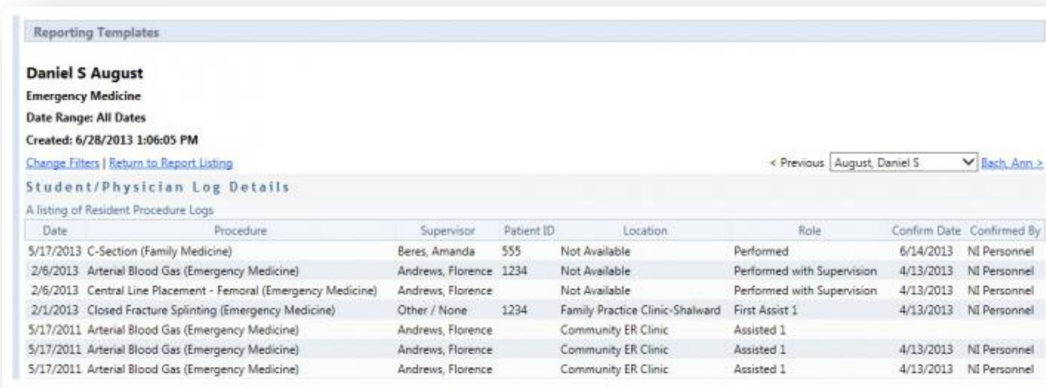
Create your own report template:

1. Click **New reporting template**
2. Check **View Items as Listing or Totals**
    1. Listing – Generates a report with details of the procedures logged.
    2. Totals – Generates a report with a summary of procedures logged.
3. Check the items to appear on the report
4. Check any Custom Logger Fields to add
5. Select who can view this report template
    1. Physicians – Allows Level 2 users in Procedure Logger to view this report.

    2. Low Level Administrators – Allows Level 4, 5 and 6 users in Procedure Logger to view this report for all personnel in the department/division.
6. Enter a name for the report.
7. Enter a description of the report
8. Click **Save**

Generate Your Custom Reports

1. Click on the name of the report
2. Select the name of the person from the drop-down box on the right side of the page to view that person's information


Reporting Templates

Daniel S August

Emergency Medicine

Date Range: All Dates

Created: 6/28/2013 1:06:05 PM

Change Filters | Return to Report Listing   < Previous August, Daniel S Bach, Ann >

Student/Physician Log Details

A listing of Resident Procedure Logs

Date	Procedure	Supervisor	Patient ID	Location	Role	Confirm Date	Confirmed By
5/17/2013	C-Section (Family Medicine)	Beres, Amanda	555	Not Available	Performed	6/14/2013	NI Personnel
2/6/2013	Arterial Blood Gas (Emergency Medicine)	Andrews, Florence	1234	Not Available	Performed with Supervision	4/13/2013	NI Personnel
2/6/2013	Central Line Placement - Femoral (Emergency Medicine)	Andrews, Florence		Not Available	Performed with Supervision	4/13/2013	NI Personnel
2/1/2013	Closed Fracture Splinting (Emergency Medicine)	Other / None	1234	Family Practice Clinic-Shalward	First Assist 1	4/13/2013	NI Personnel
5/17/2011	Arterial Blood Gas (Emergency Medicine)	Andrews, Florence		Community ER Clinic	Assisted 1		
5/17/2011	Arterial Blood Gas (Emergency Medicine)	Andrews, Florence		Community ER Clinic	Assisted 1	4/13/2013	NI Personnel
5/17/2011	Arterial Blood Gas (Emergency Medicine)	Andrews, Florence		Community ER Clinic	Assisted 1	4/13/2013	NI Personnel

LEGACY REPORTS

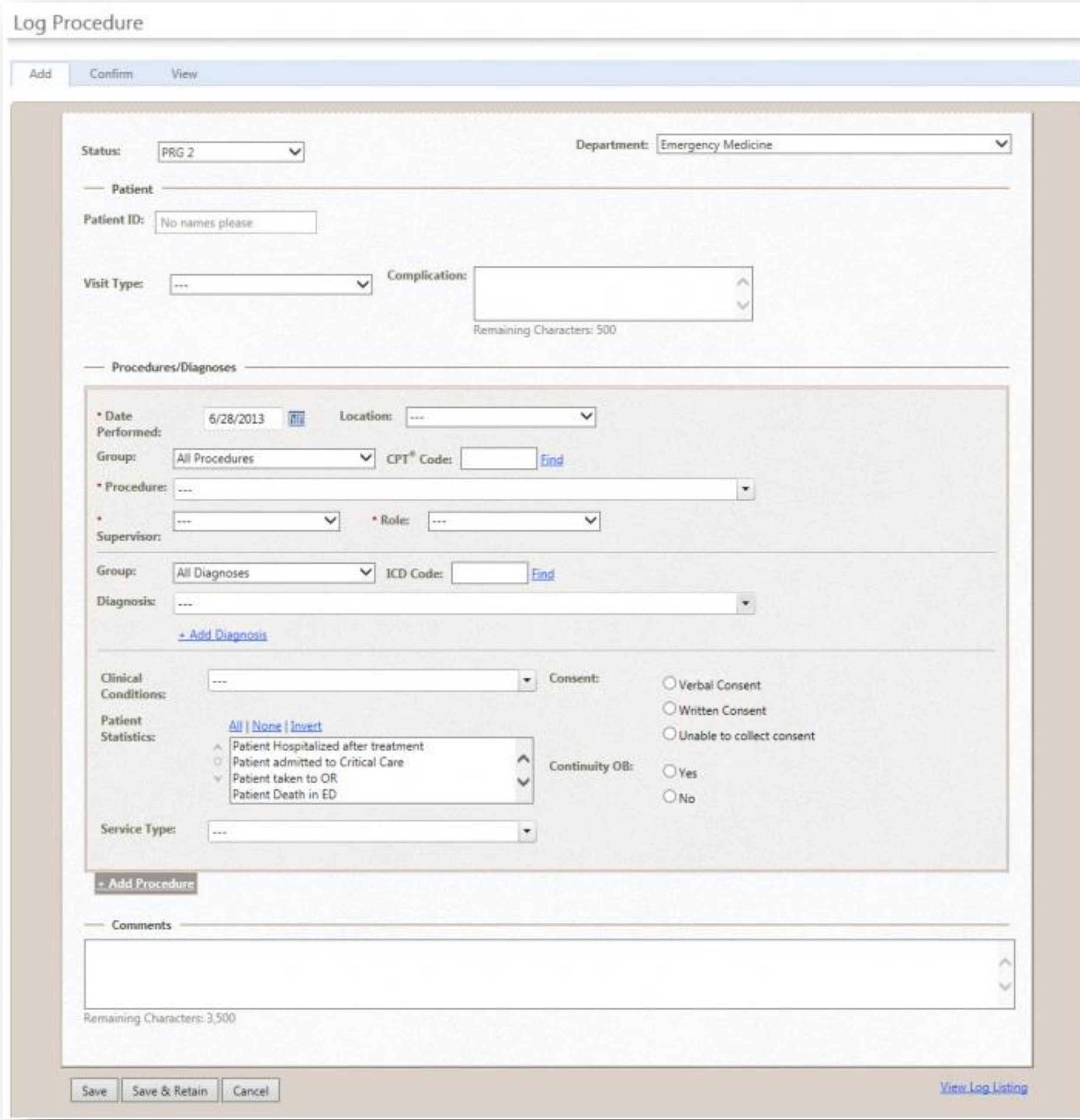
There are many other preconfigured reports to choose from in the Procedure Logger module. Go to *Logger > Resident Reports* and scroll down to the Legacy Resident Reports. There is a brief description of the contents of each report after each listing. All can be filtered by date, person, and procedure and can include archived information.

RESIDENTS AND FELLOWS

LOG A PROCEDURE

To log a procedure, follow these steps:

1. Go to *Logger > Procedure > Add tab*
2. Complete the necessary fields. Those with a red asterik are required.
3. To save the procedure, you have various options:
   - Add Procedure - Allows you to add another procedure for this same patient for the same day. Once you have added all procedures, click Save or Save and Retain.
   - Save - Saves this procedure and returns you to a new Add Procedure page
   - Save and Retain - Saves this procedure and returns you to the Add Procedure page. The patient information is removed, but the procedure information is retained.



Note: Your page may appear different depending on the setup configured by your institution.

VIEW / EDIT / DELETE A PROCEDURE

Administrators and residents/fellows can manage the list of procedures. If a procedure has not been confirmed, the procedure can be deleted or edited by both the administrator and the resident. If a procedure has been confirmed, it can not be edited by anyone. However, a confirmed procedure can be deleted by an administrator allowing the resident to re-enter the procedure correctly.

Resident/Fellow View - Go to *Logger > Procedures > View tab*

Use These Icons

- Edit - Click the pencil to edit this unconfirmed procedure.
- Delete - Click the red X to delete this procedure.
- View - Click the magnifying glass to view this confirmed procedure. These procedures can not be edited or deleted by the resident. The procedure can be deleted by an administrator.

Other Options

- Click **All Dates** to edit the date range
- Click **Filters** to change the logs based on procedure and supervisor
- Click **Columns** to add or remove columns from your view
- Click **Add Procedure** to add a new procedure to the list
- Click any column header to sort the data by that column

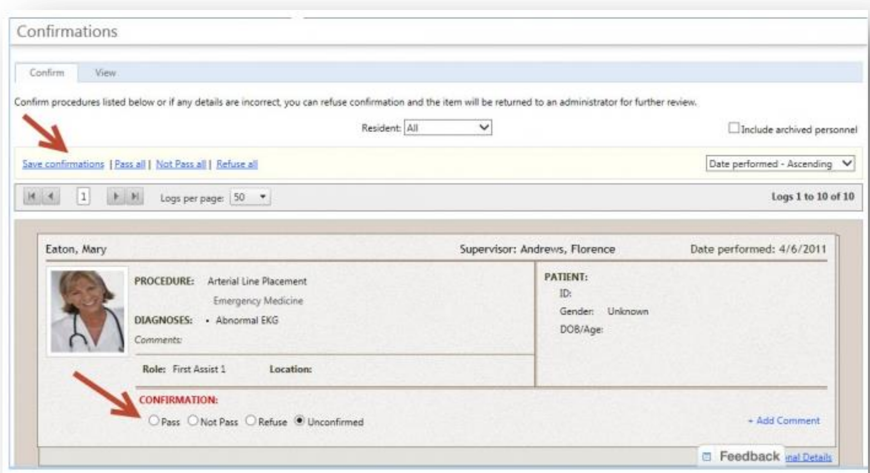
Restore a Deleted Log

When a log has been deleted from the view page, it is moved to a general list of deleted procedures. It is kept until an administrator permanently removes it from the database. If a log has been deleted in error, please contact your administrator to restore the procedure to your list.

FACULTY

CONFIRM A PROCEDURE

1. Log in using the conventional log in at www.new-innov.com or use the link in the notification email, if provided.
2. Scroll to the section labeled Notifications on the Home Page
3. Click the link under Logger to get to the procedures to confirm
4. When the screen refreshes, the list of procedures to confirm is displayed.
5. Select the appropriate radio button for each procedure
    1. Pass – confirm you were the supervisor and the resident passed
    2. Not Pass – confirm you were the supervisor but the resident did not pass
    3. Refuse – select if you were not the supervisor or do not wish to confirm the procedure.
    4. Leave Unconfirmed
6. Click the **Add Comment** link to enter your comments
7. Click **View Entire Log** to expand and view all fields in the log
8. Click **Save Confirmations**



Other Tools:

- After reviewing the logs, you can use these handy links to quicken the confirmation process: **Pass All**, **Not Pass All** or **Refuse All**. Be sure to click **Save confirmations**.
- Use the Resident drop-down list to view the procedures from one resident.
- Use the drop-down list at the top right to organize your view of procedures
- Click **Add Comment** to include comments about this resident or procedure
- Click the **View** tab to see all the procedures that have been assigned to you