

# New Innovations (RMS) Conferences Module- Reports Training



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For more information about this topic go to [Help>Tutorial Videos>Conferences> \[115\] Conference Reports](#)

## By Person Report

Generate an attendance report on a specific person.

1. Go to **Conferences > Attendance Reports > Attendance by Person**
2. Click View Report

Totals:				% Attended = Present / (# Required - Excused)							
Person	Dept/Div	Status	Category	# Conferences	# Required	Present	Tardy	Excused	% Required	% Attended	% Credit Hrs Earned
Agrawal, Roberta L	Pediatrics	PRG 3	Pediatrics :: Grand Rounds	44	44	44	0	0	100%	100%	
Totals:				44	44	44	0	0	-	100.00%	N/A
Broderick, Cathryn Ruth	Pediatrics	PRG 1	Pediatrics :: Grand Rounds	3	3	3	0	0	100%	100%	
Totals:				3	3	3	0	0	-	100.00%	N/A
Bute, Samir	Pediatrics	PRG 1	Pediatrics :: Grand Rounds	53	53	53	0	0	100%	100%	
Totals:				53	53	53	0	0	-	100.00%	N/A
Bute, Samira	Pediatrics/Neonatal Medicine	PRG 3	Pediatrics :: Grand Rounds	3	3	3	0	0	100%	100%	
Totals:				3	3	3	0	0	-	100.00%	N/A
Castro, Christine	Pediatrics/Neonatal Medicine	PRG 3	Pediatrics :: Grand Rounds	3	3	3	0	0	100%	100%	
Totals:				3	3	3	0	0	-	100.00%	N/A
Conti, Maria Victoria	Pediatrics	PRG 3	Pediatrics :: Grand Rounds	3	3	3	0	0	100%	100%	
Totals:				3	3	3	0	0	-	100.00%	N/A
Smith, Jamie	Pediatrics	PRG 2	Pediatrics :: Grand Rounds	3	3	3	0	0	100%	100%	
Totals:				3	3	3	0	0	-	100.00%	N/A
Grand Totals:				112	112	112	0	0	-	100.00%	N/A

### Report Notes and Options

- Select or create a Report Configuration from the drop-down box. Create a report configuration to save a set of filters and attributes. All options except the selected people are associated with the name you enter and save.
- To create a report configuration, click Add New link and enter a name for the configuration. Then configure your report and click the Save link. The next time you generate an Advisor Report, the configuration will appear in the Report Configuration dropdown list.
- Edit the date range or select an Academic Year
- A Conference is 'Required' if they Include this conference in attendance statistics. [Required Conference] option was checked when the Conference was created (see Create a Conference).
- A Conference is 'covered by one of the attendance requirements' if an Attendance Requirement was configured during the setup process to apply to this person (see Set Attendance Requirements).
- Check the Only show conferences held in [Your Department/Division] box to restrict the conferences data to those occurring in your department only.

- Check one or both options below the Show these People... drop-down box.
- The Include archived people in the list option will include in the drop-down box people who have been archived.
- The Include rotators from other departments/divisions option will include rotators in the Report.
- Remove the check from the Allow Paging checkbox to list everyone on the same page.
- Removing the check from the Include details in this report checkbox will exclude ALL the checked Conference columns from the top portion of the report. If you keep the check, you can then remove one or more checks from specific columns, which will omit just those columns from the top portion of the report.
- Check Filter by Status to restrict the data included in the report to that belonging to people assigned those Status Types.
- Check Filter by Department/Division to select specific Departments and/or Divisions you want to see data from
- Click **Filter by Rotation** and then one or more of three options below the Rotations multi-select box.
- Check Display My Rotations Only to list all Rotations that belong to the current department.
- Check Include conferences held while not on a rotation to include attendance statistics on Conferences you may have attended while not assigned to any Rotation.
- Check Filter by Category and select one or more the options from the Categories multi-select box.
- Conferences set up without a content category will be combined and displayed in the "blank" row directly above the totals for each person.
- % Credit Hrs. Earned = credit hours earned from conferences where a learner is on the attendance roster and marked as 'Present' / total credit hours from conferences where a learner is on the attendance roster. This data will appear in the Totals for each resident.

## By Conference Report

Generate an attendance report for a specific conference.

1. **Go to Conferences > Attendance Reports > Attendance by Conference**
2. Select a date range
3. Select the name of the conference
4. Click **View Report**

Grand Rounds						
8/23/2012 1:04 PM - 8/23/2012 2:04 PM						
Person	Status	Department	Rotation	Present	Tardy	Excused
Bute, Samir	PRG 1	Pediatrics	PED:BEHAV DEV	●		
Agrawal, Roberta L	PRG 3	Pediatrics	EM:EM	●		
Bute, Samira	PRG 3	Neonatal Medicine	PED:ADOL	●		
Castro, Christine	PRG 3	Neonatal Medicine	PED:COMMUNITY	●		
<a href="#">Export to Excel</a>						
<b>Totals:</b>						
Status Types	# On Roster	Present	Tardy	Excused	Attendance Percentage	
PRG 1	1	1	0	0	100.00%	
PRG 3	3	3	0	0	100.00%	
All	4	4	0	0	100.00%	
<a href="#">Export to Excel</a>						
Rotations	# On Roster	Present	Tardy	Excused	Attendance Percentage	
EM:EM	1	1	0	0	100.00%	
PED:ADOL	1	1	0	0	100.00%	
PED:BEHAV DEV	1	1	0	0	100.00%	
PED:COMMUNITY	1	1	0	0	100.00%	
All	4	4	0	0	100.00%	
<a href="#">Export to Excel</a>						
Dept/Div	# On Roster	Present	Tardy	Excused	Attendance Percentage	
Neonatal Medicine	2	2	0	0	100.00%	
Pediatrics	2	2	0	0	100.00%	
All	4	4	0	0	100.00%	
<a href="#">Export to Excel</a>						

### Report Notes and Options

- The default date range begins two months prior to the Current Date
- The Update List button reloads the Conference list with Conferences that are scheduled within the specified date range.
- Remove the check from the Show Required Conferences Only checkbox, and then select one or more Conferences from the dropdown list.
- If Show Required Conferences only is checked, only required Conferences will be listed in the Conferences dropdown list.
- Conferences are required if they Include this conference in attendance statistics [Required Conference] option was checked when the conference was created
- Selecting specific Departments and/or Divisions will restrict the data included in the report to that belonging to people assigned to selected Departments or Divisions.
- Checking the Include Archived Rotations checkbox will include archived Departments and Division in the Rotations multi-select box.

- Checking the Only show rotations from Infectious Disease option will limit the Rotations included in the multi-select box to just those that belong to the Active Department/Division.
- Checking the Include people not on rotation option will include in the REPORT people assigned to Conferences when not on rotations.
- Selecting specific Rotations will restrict the data included in the report to that belonging to people assigned just to those Rotations.

## Core Competency Report

The Core Competency Report provides the following data for each Core Competency:

- Conference name and department
- Core Competency associated with the conference's content category and sub-content category
- Start date
- Duration
- Credit hours (CH)
- Other credit hours (OCH)

Optional report details include for each Core Competency total duration, credit hours, and other credit hours. Conferences must have been associated with one or more Core Competencies to be included in the report. Each Conference is listed once for each Core Competency associated with it. Conferences with multiple Core Competencies are identified by a green asterisk.

1. **Go to Conferences > Content Reports > Core Competency**
2. Click Core Competency by Department/Division
3. Enter a date range or select an Academic Year
4. Select one or more core competencies from the dropdown list
5. Optional: Remove the check from the Show Details on Report box.
6. Click View Report

Totals:				
Department/Division	Core Competency	Duration	CH	OCH
Department of Neurosurgery/NSURG - Neurosurgery	Patient Care	6.00 hr(s)	8	0
Department of Neurosurgery/NSURG - Neurosurgery	Medical Knowledge	6.00 hr(s)	8	0
Department of Orthopaedics/ORTHO - Pediatric Orthopaedics	Patient Care	25.00 hr(s)	0	0
Department of Orthopaedics/ORTHO - Pediatric Orthopaedics	Medical Knowledge	25.00 hr(s)	0	0
Department of Orthopaedics/ORTHO - Pediatric Orthopaedics	Systems-Based Practice	25.00 hr(s)	0	0
Department of Pathology/PATH - Blood Bank	Patient Care	27.00 hr(s)	0	0
Department of Pathology/PATH - Blood Bank	Medical Knowledge	27.00 hr(s)	0	0
Department of Pathology/PATH - Blood Bank	Practice-Based Learning and Improvement	27.00 hr(s)	0	0
Department of Pathology/PATH - Blood Bank	Interpersonal and Communication Skills	31.50 hr(s)	0	0
Department of Pathology/PATH - Blood Bank	Professionalism	31.50 hr(s)	0	0
Department of Pathology/PATH - Blood Bank	Systems-Based Practice	28.50 hr(s)	0	0
Department of Pediatrics/PEDS - Emergency Medicine	Patient Care	37.00 hr(s)	0	0
Department of Pediatrics/PEDS - Emergency Medicine	Medical Knowledge	37.00 hr(s)	0	0
Department of Pediatrics/PEDS - Emergency Medicine	Practice-Based Learning and Improvement	37.00 hr(s)	0	0
Department of Pediatrics/PEDS - Emergency Medicine	Interpersonal and Communication Skills	37.00 hr(s)	0	0
Department of Pediatrics/PEDS - Emergency Medicine	Professionalism	37.00 hr(s)	0	0
Department of Pediatrics/PEDS - Emergency Medicine	Systems-Based Practice	37.00 hr(s)	0	0
Department of Pediatrics/PEDS - Emergency Medicine	Osteopathic Philosophy and Osteopathic Manipulative Medicine	4.00 hr(s)	0	0

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## Core Competency Report by Person

The Core Competency Report by Person provides the following data for each Core Competency:

- The name and Department/Division of each person who attended a Conference associated with a Core Competency
- Content-Category
- Sub-Content Category
- Start date
- Duration
- Credit hours (CH)
- Other credit hours (OCH)

Optional report details include for each Core Competency, total duration, credit hours, and other credit hours. A person must have attended a Conferences associated with one or more Core Competencies to be included in the report. Each Person is listed once for each Conference they attended with a Core Competency associated with it. Conferences listed multiple times are identified by a green asterisk.

1. **Go to Conferences > Content Reports > Core Competency**
2. Click Core Competency by Person
3. Enter a date range or select an Academic Year
4. Select one or more Core Competencies
5. Select people
6. Optional: Check Show Details on Report...
7. Click **View Report**

Core Competency Report by Person - 9/1/2012 - 12/24/2012								10/24/2012 9:03:22 AM	
* Department	Name	Conference	Category	Sub Category	Core Competency	Start	Duration	CH	OCH
JAS Surgery/JAS - General Surgery	Alden, Wyatt	Grand Rounds	Rounds		Patient Care	9/3/2012 7:00 AM	2.00 hr(s)	0	0
JAS Surgery/JAS - General Surgery	Alden, Wyatt	Grand Rounds	Rounds		Patient Care	9/10/2012 7:00 AM	2.00 hr(s)	0	0
JAS Surgery/JAS - General Surgery	Alden, Wyatt	Grand Rounds	Rounds		Patient Care	9/24/2012 7:00 AM	2.00 hr(s)	0	0
JAS Surgery/JAS - General Surgery	Alden, Wyatt	Grand Rounds	Rounds		Medical Knowledge	9/3/2012 7:00 AM	2.00 hr(s)	0	0
JAS Surgery/JAS - General Surgery	Alden, Wyatt	Grand Rounds	Rounds		Medical Knowledge	9/10/2012 7:00 AM	2.00 hr(s)	0	0
JAS Surgery/JAS - General Surgery	Alden, Wyatt	Grand Rounds	Rounds		Medical Knowledge	9/24/2012 7:00 AM	2.00 hr(s)	0	0
JAS Surgery/JAS - General Surgery	Alden, Wyatt	Journal Club - Medical Knowledge	Journal Club		Medical Knowledge	9/4/2012 10:00 AM	1.00 hr(s)	0	0
JAS Surgery/JAS - General Surgery	Alden, Wyatt	Grand Rounds	Rounds		Practice-Based Learning and Improvement	9/3/2012 7:00 AM	2.00 hr(s)	0	0
JAS Surgery/JAS - General Surgery	Alden, Wyatt	Grand Rounds	Rounds		Practice-Based Learning and Improvement	9/24/2012 7:00 AM	2.00 hr(s)	0	0
JAS Surgery/JAS - General Surgery	Alden, Wyatt	Grand Rounds	Rounds		Practice-Based Learning and Improvement	9/10/2012 7:00 AM	2.00 hr(s)	0	0

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Totals:					
Department	Name	CoreCompetency	Duration	CH	OCH
JAS Surgery/JAS - General Surgery	Alden, Wyatt	Patient Care	6.00 hr(s)	0	0
JAS Surgery/JAS - General Surgery	Alden, Wyatt	Medical Knowledge	7.00 hr(s)	0	0
JAS Surgery/JAS - General Surgery	Alden, Wyatt	Practice-Based Learning and Improvement	6.00 hr(s)	0	0

## Content Category Report

The Content Category Report lists each Conference that is associated with a Content Category and scheduled within a specific date range. In addition to Content Category, the following data for each Conference listed is provided: the Conference name, Sub-Content Category (if any), start and end dates and times, credit hours (CH) and other credit hours (OCH). In addition, total credit hours and other credit hours are reported for each Content Category.

1. **Go to Conferences > Content Reports > Content Category**
2. Enter a date range or select an Academic Year.
3. Select one or more Content Categories
4. Click **View Report**

Date Range: 9/1/2012 - 10/23/2012						
Category	Sub-Content	Conference	Start	End	CH	OCH
Journal Club		Journal Club - Medical Knowledge	9/4/2012 10:00 AM	9/4/2012 11:00 AM	1	0
Journal Club		Journal Club - Interpersonal Communication	10/2/2012 10:00 AM	10/2/2012 11:00 AM	0	0
Rounds		Grand Rounds	9/3/2012 7:00 AM	9/3/2012 9:00 AM	2	0
Rounds		Grand Rounds	9/10/2012 7:00 AM	9/10/2012 9:00 AM	2	0
Rounds		Grand Rounds	9/17/2012 7:00 AM	9/17/2012 9:00 AM	2	0
Rounds		Grand Rounds	9/24/2012 7:00 AM	9/24/2012 9:00 AM	2	0
Rounds		Grand Rounds	10/1/2012 7:00 AM	10/1/2012 9:00 AM	2	0
Rounds		Grand Rounds	10/8/2012 7:00 AM	10/8/2012 9:00 AM	2	0
Rounds		Grand Rounds	10/15/2012 7:00 AM	10/15/2012 9:00 AM	2	0
Rounds		Grand Rounds	10/22/2012 7:00 AM	10/22/2012 9:00 AM	0	0
<a href="#">Export to Excel</a>						
Totals						
Category	Credit Hours (CH)		Other Credit Hours (OCH)			
Journal Club	1		0			
Rounds	14		0			

## Curriculum Code Report

The Curriculum Code Report lists Conferences by the curriculum codes assigned to them. In addition to the curriculum code, the following data is provided for each Conference:

- Date
  - Content Category
  - Sub-Content Category
  - Credit hours (CH)
  - Other credit hours (OCH)
1. Go to **Conferences > Content Reports > Curriculum Code**
  2. Enter a date range
  3. Select a curriculum code or select 'All'
  4. Optional: Check Only show conferences that have a curriculum code
  5. Click **Update List**

Conference	Date	Code	Content Ca
Grand Rounds	9/3/2012 12:00:00 AM	GR2	Rounds
Journal Club - Medical Knowledge	9/4/2012 12:00:00 AM	JC1	Journal Clu
Grand Rounds	9/10/2012 12:00:00 AM	GR2	Rounds
Grand Rounds	9/17/2012 12:00:00 AM	GR2	Rounds
Grand Rounds	9/24/2012 12:00:00 AM	GR2	Rounds
Grand Rounds	10/1/2012 12:00:00 AM	GR2	Rounds
Journal Club - Interpersonal Communication	10/2/2012 12:00:00 AM		Journal Clu
Grand Rounds	10/8/2012 12:00:00 AM	GR2	Rounds
Grand Rounds	10/15/2012 12:00:00 AM	GR2	Rounds
Grand Rounds	10/22/2012 12:00:00 AM		Rounds

## Speaker Reports

Speaker Reports can be generated to display survey results about your conference speakers. The coordinator can generate the report as well as a speaker.

### Speakers Report - Generated by Coordinator

The Speakers Report lists selected speakers and the Conferences to which they are assigned within a specified date range. It can only be generated for speakers who have a demographic record in your database.

Other columns include the Category, Date, Credit hours, other credit hours and Topic. Speakers are listed once per each Conference assigned. In addition, total Conferences, credit hours, and other credit hours are provided for each speaker.

1. **Go to Conferences > Attendance Reports > Conferences by Speaker**
2. Set a date range
3. Select one or more Conference speakers
4. Click **View Report**

Speaker	Category	Conference	Date	CH	OCH	Topic
Beebe, Elizabeth	JAS - General Surgery:Journal Club	<a href="#">Journal Club - Medical Knowledge</a>	9/4/2012	1	0	
Benson, Wayne A	JGB Internal Medicine:Wednesday Morning Meetings	<a href="#">Wednesday Morning Meetings</a>	9/19/2012	0	0	
Berg, Kevin Lucas	JM-Internal Medicine:Journal Club	<a href="#">Journal Club</a>	9/26/2012	0	0	
Brooks, Minerva	JAS - General Surgery:Rounds	<a href="#">Grand Rounds</a>	9/3/2012	2	0	
Daruwalla, Farrokh	JAS - General Surgery:Rounds	<a href="#">Grand Rounds</a>	9/10/2012	2	0	
Fillmore, Steve	JM-Internal Medicine:Grand Rounds	<a href="#">Grand Rounds 1</a>	9/4/2012	0	0	
Fisher, Mary	JM-Internal Medicine:Grand Rounds	<a href="#">Grand Rounds 1</a>	9/4/2012	0	0	
Goddard, Stewart	JAS - General Surgery:Rounds	<a href="#">Grand Rounds</a>	9/17/2012	2	0	
Grimes, John Wesley	JGB Internal Medicine:Didactics	<a href="#">Noon Conference</a>	9/19/2012	0	0	
Johnston, Carissa	JM-Internal Medicine:Grand Rounds	<a href="#">Grand Rounds 1</a>	9/4/2012	0	0	
Milliken, Matt	EM Internal Medicine:Noon Conference	<a href="#">Noon Conference</a>	9/24/2012	0	0	
Parker, Peter	JM-Internal Medicine:Grand Rounds	<a href="#">Grand Rounds 2</a>	9/18/2012	0	0	
Potter, Sal	JAS - General Surgery:Rounds	<a href="#">Grand Rounds</a>	9/24/2012	2	0	
Sanders, Luke Jack	JM-Internal Medicine:Journal Club	<a href="#">Journal Club</a>	9/26/2012	0	0	---

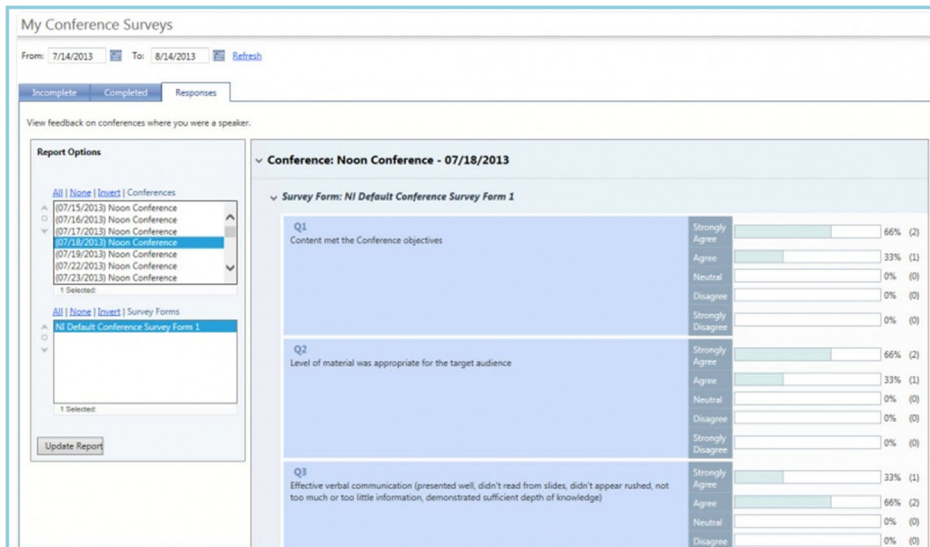
[Export to Excel](#)

Totals			
Speaker	# of Conferences	Credit Hours (CH)	Other Credit Hours (OCH)
Beebe, Elizabeth	1	1	0
Benson, Wayne A	1	0	0
Berg, Kevin Lucas	1	0	0
Brooks, Minerva	1	2	0
Daruwalla, Farrokh	1	2	0
Fillmore, Steve	1	0	0
Fisher, Mary	1	0	0
Goddard, Stewart	1	2	0
Grimes, John Wesley	1	0	0
Johnston, Carissa	1	0	0
Milliken, Matt	1	0	0
Parker, Peter	1	0	0
Potter, Sal	1	2	0
Sanders, Luke Jack	1	0	0

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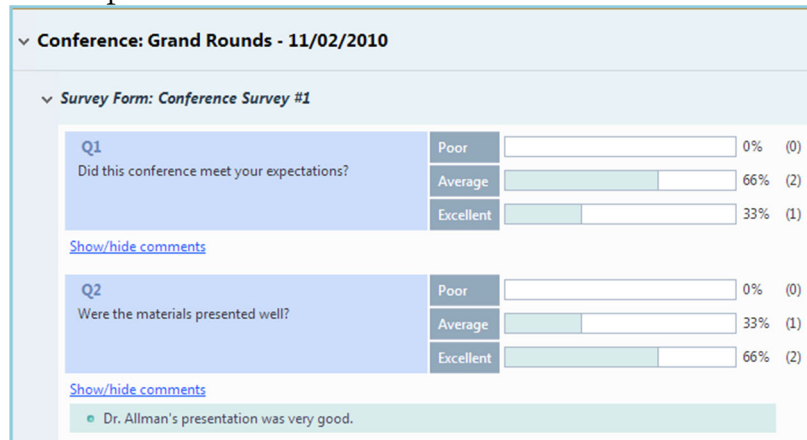
## Speakers Report - Generated by the Speaker

1. Go to Conferences > Surveys > My Surveys
2. Select a date range and click Refresh
3. Select the Responses tab
4. Select a conference
5. Select a survey form
6. Click Update Report
7. Survey results are displayed on the right side of the page. Comments are listed below.



## Survey Results Report

Administrators can run Survey Results Reports by speaker and filter by speaker name, date, conference and form name. Results are grouped by conference name, form and question. They can export their results to Microsoft Excel.



### By Speaker

1. **Go to Conferences > under Attendance Reports: Survey Results**
2. Set the report mode to By Speaker
3. Select the speaker's name
4. Set the date range
5. Click Refresh Lists
6. Select the conferences and forms
7. Click **Update Report**

### By Conference

1. **Go to Conferences > under Attendance Reports: Survey Results**
2. Select the conference.
3. Set the date range
4. Click Refresh Lists
5. Select the forms
6. Click **Update Report**

*If multiple conferences fall within the date range, only the first speaker is named at the top of the report*

## Survey Compliance Report

The Survey Compliance Report shows compliance data for survey completion. The report displays the number of conferences, both available and delinquent, whose due dates fall within the date range selected. The Percentage Compliant column reports the percentage of surveys completed that were due within the date range selected.

1. **Go to Conferences > under Attendance Reports: Survey Compliance**
2. Select filters:
  - a. Select the Date Range. Select Refresh Conference List
  - b. Select the Conferences
  - c. Select the Status types
3. Click **Update Report**

Emails can be sent to remind people to complete their conference surveys.

1. Check the box in front of a person. (Those people with a red 'X' in the box do not have a primary email address listed in their Personnel record and cannot be emailed from this screen.)
2. Click Email Selected People
3. Edit the subject and body of this email, if needed
4. Click Send Mail

Surveys that have gone beyond the Available Date, do not show up on this report. There would be no need to email an attendee to remind them to complete a survey that has expired.

Name	Available	Delinquent	% Compliant
▼ PRG 1			
<input type="checkbox"/> Ellenhurst, Lorraine	1	1	0%
<input type="checkbox"/> Richardson, Anna	1	1	0%
▼ PRG 2			
<input type="checkbox"/> Atwater, Helen	1	0	100%
<input type="checkbox"/> Breathett, Kay Lynn	1	1	0%
<input type="checkbox"/> Hickman, Homer	1	1	0%
<input type="checkbox"/> Kapil, Ranjit	1	1	0%
▼ PRG 3			
<input type="checkbox"/> Arko, Seth	1	0	100%
<input type="checkbox"/> Legg, Terry	1	1	0%
<input checked="" type="checkbox"/> Lieber, Shane	1	1	0%

## Survey Status Report

Use this report to:

- View completed surveys
  - Delete completed surveys
  - Complete surveys for others
1. Go to **Conferences > under Surveys: Survey Status**
  2. Change the date range (if necessary) and click **Update**
  3. Select surveys and Click **View Selected** to view completed surveys.  
Administrators will see all evaluator information unless they are the speaker
  4. Select surveys and click **Delete Selected** to remove them from the list
  5. Click the funnel icon at the top of a column to filter by that item

<input type="checkbox"/>			Conference	Start Date/Time	Category	Attendee	Survey Form
<input type="checkbox"/>	View	Delete	Grand Rounds	10/22/2012 7:00:00 AM	Rounds	Ashwood, Scott	NI Default Conference Survey Form 1
<input type="checkbox"/>	View	Delete	Grand Rounds	10/22/2012 7:00:00 AM	Rounds	Breathett, Kay Lynn	NI Default Conference Survey Form 1
<input type="checkbox"/>	View	Delete	Grand Rounds	10/22/2012 7:00:00 AM	Rounds	Legg, Terry	NI Default Conference Survey Form 1
<input type="checkbox"/>	View	Delete	Journal Club - Interpersonal Communication	10/2/2012 10:00:00 AM	Journal Club	Ashwood, Scott	NI Default Conference Survey Form 1
<input type="checkbox"/>	View	Delete	Journal Club - Interpersonal Communication	10/2/2012 10:00:00 AM	Journal Club	Breathett, Kay Lynn	NI Default Conference Survey Form 1
<input type="checkbox"/>	View	Delete	Journal Club - Interpersonal Communication	10/2/2012 10:00:00 AM	Journal Club	Legg, Terry	NI Default Conference Survey Form 1
<input type="checkbox"/>	View	Delete	Journal Club - Medical Knowledge	9/4/2012 10:00:00 AM	Journal Club	Alden, Wyatt	NI Default Conference Survey Form 1
<input checked="" type="checkbox"/>	Complete		Journal Club - Medical Knowledge	9/4/2012 10:00:00 AM	Journal Club	Allen, Joel	NI Default Conference Survey Form 1
<input type="checkbox"/>	View	Delete	Journal Club - Medical Knowledge	9/4/2012 10:00:00 AM	Journal Club	Arko, Seth	NI Default Conference Survey Form 1

Key:

- Yellow triangle - Survey has expired
- Red Circle - Survey is still available but delinquent
- Red 'x' - Delete Survey
- Magnifying glass/View - Survey is completed
- Green check/Complete - Survey can be completed by viewer