# New Innovations (RMS) Conference Module Training

MMCGME

Metro MN Council on Graduate Medical Education

2023

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## Intro to Conferences

**New Innovations offers you an interface to manage conferences and didactic events for your program. Using the Manage Conferences page, you can create new conferences, manage existing conferences, take attendance and distribute conference surveys. This module allows you to set attendance requirements and generate attendance reports incorporating those standards.**

**There are many options available to you for scheduling and reporting the educational experiences your program offers, including:**

- **Building stand-alone or recurring conferences**
- **Building rosters with names of those who can be in attendance**
- **Attendees taking their own attendance using QR Code**
- **Assigning speakers**
- **Uploading attachments such as documents, PPT slide decks and links to websites pertaining to the conference topic**
- **Sending attendee and speaker notifications**
- **Distributing conference feedback surveys**
- **Creating reports about Attendance, Speakers and Surveys**
- **Configure Conferences to populate a resident or fellow work hour logs when marked present at a conference**
- **Create custom views of the calendar**

## Access

**The following privilege levels have access to Conferences:**

**Level 6 - Setup and maintain the Conference module**

**Level 5 - Setup and maintain the Conference module**

**Level 4 - Take attendance**

**Level 3 - View their own Conference calendar and attendance reports; Take their own attendance**

**Level 2 - View their own Conference calendar and attendance reports**

**Level 1 - N/A**

## Glossary

**Attendance Requirements - Create attendance requirements that are used during report generation.**

**CLER Visits and Conferences - The CLER Visit widgets (in the Sponsor and Program Administration pages) display attendance information for conferences that have been tagged with one of the six CLER focus areas. The CLER agents want to see evidence that the residents and faculty are being educated about fatigue management, patient safety and**

so on. To have that information displayed, check the CLER focus area that applies to this conference. You may check more than one. For more information about CLER focus areas, please see Administration > Sponsor Administration.

QR Code - Attendees can take their own attendance by scanning a QR code generated and displayed by the Conference administrator

Recurring Conference - Recurring conferences happen on a predictable date and time. For example, Journal Club may occur every Tuesday at noon. Within the software, you can enter one conference and create a recurring pattern for the entire year.

Roster - A roster is a list of conference attendees. Attendance records can be created for those on the roster.

Speaker - The conference speaker is the person presenting a topic at a conference.

Stand-Alone Conference - A stand-alone conference is a conference that occurs only one time.

Survey - Surveys can be sent to attendees to evaluate the content and speakers of your conferences

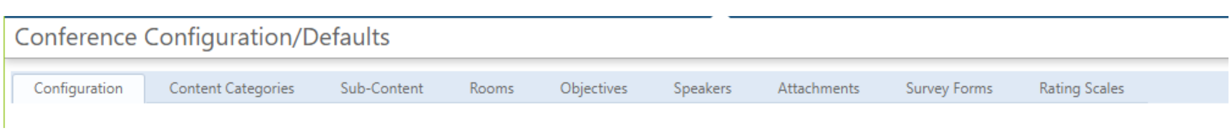
Before you begin:

1. Make sure all trainees have a training record and all faculty have a Personnel profile if they are to be included on the conference roster
2. Make sure people are scheduled on the Block schedule so their rotation at the time of the conference is recorded on the roster
3. Create an assignment definition called 'Conference' if you want to have a trainee's conference attendance populate their work hour logs

## Setting Conference Details

Set up configuration defaults. These are items that are used regularly when creating conferences. Setting them up ahead of time is more convenient for you.

Go Conferences > Setup > Conference Details




### Configuration Tab

**Default Location:** Select the default location from the dropdown list. This will be the location used for each conference unless you change it.

**Defaults for Conference Attendance Roster:** The roster is automatically built for you each time you create a conference whether it's a single instance or a series. Select the option that works best for you in the majority of conferences. The roster can always be rebuilt or the default changed as needed.

1. **Click the link 'View/Edit Default Conference Roster Configurations' to view the options:**
    a) **Choose how to build the Roster:**

**Option 1: Build Attendance Roster by Rotation and Status**

**This option uses the block schedule to build the roster. Select the rotations and statuses to include. When the conference is created, the system will look at the block schedule and only include the people with the selected statuses on the selected rotations. Example: Use this method if residents will always be excused from conferences while on a certain rotation.**

**Option 2: Build Attendance Roster by Departmental Personnel**

**This option uses the statuses as listed on the Block Schedule and in the Personnel module to build the roster. Choose the statuses to include.**

b) **Include People from My Divisions (if applicable) on Attendance Roster when it is automatically built. Check this box to include personnel from divisions within your department**
c) **Allow level 4 users in Conferences for this department/division to Add and/or Remove people from attendance rosters. Check this box to permit Level 4 users, such as a Chief Resident/Fellow or administrator to take attendance**
d) **When taking attendance, show a default of ___ attendees on each page. Select the number of people to display on a page when taking attendance**

**Conferences and Work Hours -** **This feature links Conferences and Work Hours so that when a Trainee is marked present at a conference, a work hour log is automatically inserted in their records for the date and duration of the conference. Highlight the Trainee status types from the Statuses box that should have this feature enabled.**
**Note: For it to work correctly, there needs to be an assignment definition configured for Conference setup and tied to the duty type Conference.**

### Auto-Login

1. **Auto-Login - Select 'Yes' to insert an auto-login link to Conference Surveys in the survey notification email.**

**Click Save Configuration**

## Content Categories Tab

**Creating Content Categories is optional but beneficial because they can be used to categorize common groups of conferences by category, like Grand Rounds or Journal Club. You can also use them to establish specific attendance criteria for content categories.**

1. **Go to the Content Categories tab**
2. **Enter a name for the Content Category in the text box and click the Add New link. Repeat until all Content Categories have been created.**
3. **Each Content Category name must be unique**

**As you create them, Content Categories are listed in a table where they can be edited and deleted.**

## Sub-Content Tab

**Sub-Content Categories are optional. They are used to further define Content Categories. However, while you can use categories to group topics in an Attendance report, it is not possible to define attendance requirements by Sub-Content Category.**

1. **Go to the Sub Content tab**
2. **Select a Content Category from the drop-down list**
3. **Enter a Sub-Content name in the text box, and click the Add New link. Repeat until all Sub-Content Categories have been created.**
4. **Each Sub-Content Category name must be unique.**

**As you create them, Sub-Content Categories are listed in a table where they can be edited and deleted**

## Rooms Tab

**Include the names of rooms where the conference will take place**

1. **Go to the Rooms tab**
2. **Enter a Conference Room name**
3. **Click Add New**
4. **Repeat until all Conference Rooms have been added**

## Objectives Tab

**Add objectives to a conference**

1. **Go to the Objectives tab**
2. **Enter an Objective**
3. **Click Add New**

## Speakers Tab

**Maintain a list of speakers and their topics**

1. **Go to the Speakers tab**
2. **Change the date range if necessary**
3. **Select the conference from the drop-down list**
4. **Click on the blue link to add a speaker**
5. **Choose a person from the department or Filter list of People to include other department personnel. The person's email address should be populated.**
6. **Or Click Add New to enter a speaker who is not in the database. Enter the person's email.**
7. **Enter the speaker's topic**
8. **Send an email notification to the speaker? Select the Yes radio button**
    - **You may include a link to NI and create a custom message**
    - **Enter the Subject**
    - **Enter the 'from' email address**
    - **Send Copy: enter email address(es)**
    - **Add Attachment for speaker, such as directions to the conference site**
    - **Enter the number of days prior to the conference to send the notification**

## Attachments Tab

**Add attachments to the conference for attendees to download and view. Attachments cannot exceed 12 MB.**

1. **Go to the Attachments tab**
2. **Adjust the dates if necessary to find the correct conference**
3. **Highlight the name of the conference or hold down the Ctrl key to select more than one**
4. **Enter the name of the attachment**
5. **Click Select and browse for the attachment**
6. **Click on the attachment and then Open**
7. **Click Upload File**

## Survey Forms Tab

1. **Click the "new" link to add a new conference survey**

## Rating Scales Tab

1. **Click the "new" link to add a new rating scales**

**For more information about conference set up go to Help>Tutorial Videos>Conferences- [11.1] Conferences-Setup**

# Setting Attendance Requirements for Conferences

Administrators setup attendance requirements for their conferences. This allows the administrator to generate attendance reports that compare actual attendance rates against the attendance requirements. There are three options for establishing your attendance requirements.

**Option 1 - Set the same requirement for all attendees for all conferences.**

**Example:**

- **All residents are required to attend 80% of all conferences in this department**

**Option 2 - Set different requirements based on the status of the attendee**

**Example:**

- **Residents with PRG-1 status are required to attend 100% of all department conferences**
- **Residents with PRG-2 status are required to attend 90% of all department conferences**
- **Residents with PRG-3 status are required to attend 80% of all department conferences**

**Option 3 - Set different requirements based on both status types and content categories.**

**Example:**

- **All personnel with PRG-1 status are required to attend 100% of all Journal Club conferences**

- **All personnel with PRG-1 status are required to attend 75% of all M & M conferences**
- **All personnel with PRG-2 status are required to attend 90% of all Journal Club conferences**
- **All personnel with PRG-2 status are required to attend 75% of all M & M conferences**
- **All personnel with PRG-3 status are required to attend 80% of all Journal Club conferences**
- **All personnel with PRG-3 status are required to attend 70% of all M & M conferences**

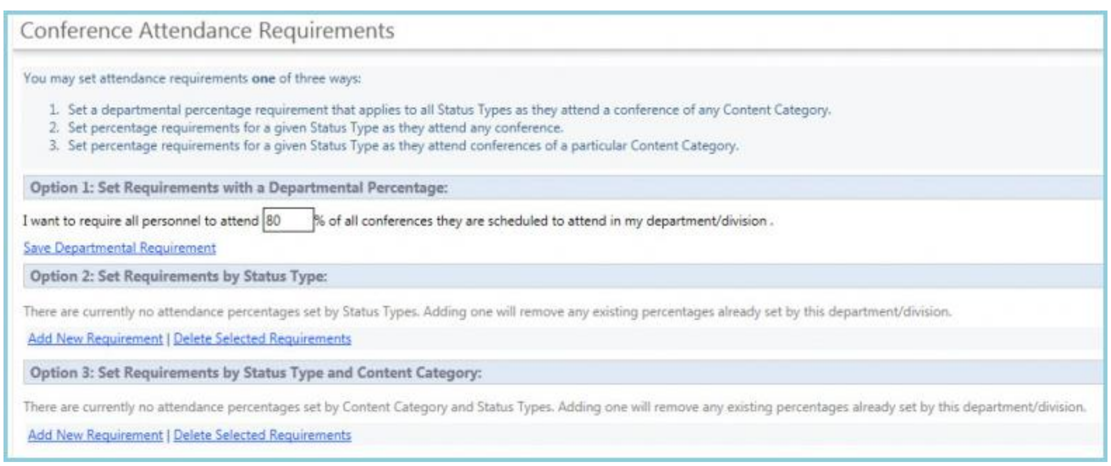
## Set Up Attendance Requirements

1. **Go to Conferences > Setup > Requirements**
2. **Select one of three options:**
   a) **Set attendance percentage requirement for all department personnel**
      - **Enter a percentage**
      - **Click Save Departmental Requirement**

   b) **Set Requirements by Status**
      - **Click Add New Requirement**
      - **Enter an attendance percentage requirement**
      - **Select the appropriate statuses**
      - **Click Save Requirement**

   c) **Set Requirements by Status and Content Category**
      - **Click Add New Requirement**
      - **Enter an attendance percentage requirement**
      - **Select Content Categories**
      - **Select statuses**
      - **Click Save Requirement**

**Repeat the steps until all requirements are entered.**



Conferences can be created as 'Stand Alone' which is just one conference or a recurring series that repeats in a set pattern for a specified period of time.

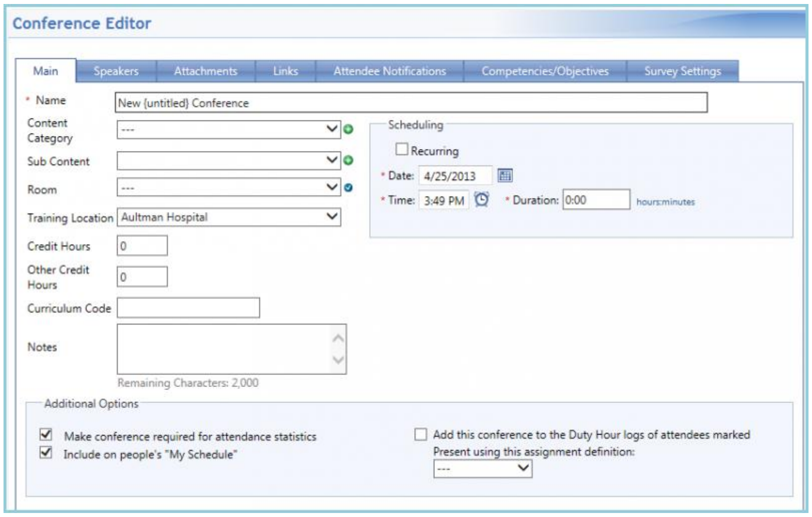
Notes:

- When the dates of a recurring conference do not occur in a regular pattern, the Recurring option cannot be used. Create a stand-alone conference for each instance.
- It is recommended that Categories be used in conferences that have Attendance Requirements configured. This makes Attendance reports much easier to interpret.

**For more information about conference set up go to Help>Tutorial Videos>Conferences- [11.1] Conferences-Setup**

# Create a Conference

1. **Go to Conferences > Manage Conferences > Add**
2. **Enter the Name of the conference**
3. **Select the Content Category and Sub Content. New categories can be added by clicking the green icon**
4. **Select Room. Check availability of the room by clicking the blue icon.**
5. **Select Training Location**
6. **Enter Credit or Other Credit Hours and Curriculum Code**




## Scheduling

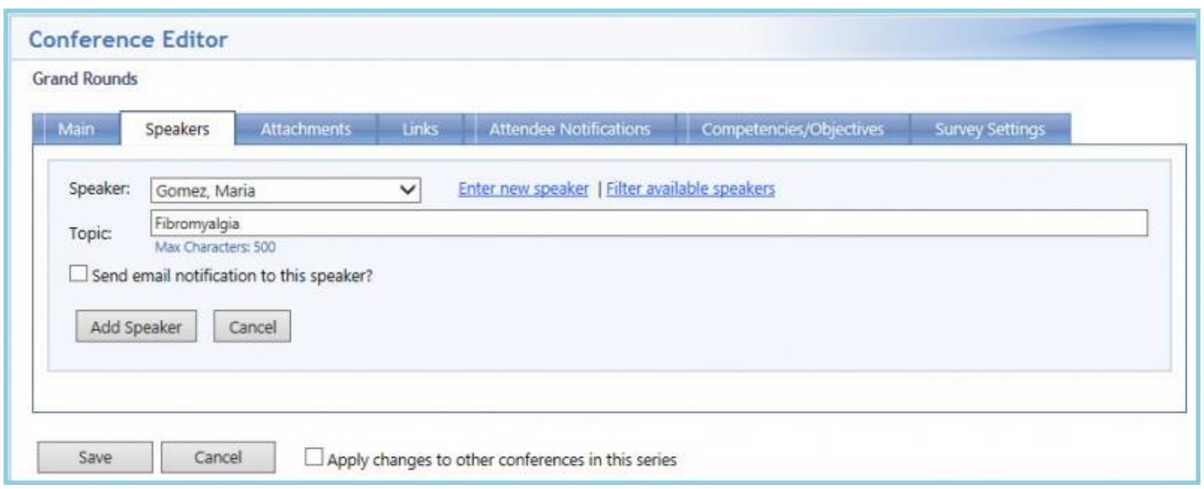
1. **Stand Alone - enter the date, start time and duration of the conference if the conference is a stand alone**
2. **Recurring Series - check the box for recurring**
   - **Enter the date range or choose an academic year**
   - **Enter the start time and the duration**
   - **Choose the recurring pattern**
     a) **Daily - The conference will be created on Monday-Friday for the date range.**
     b) **Weekly - The conference will be created every x week(s) on the day selected for the date range. Example: Every 2 weeks on Tuesday is every other Tuesday.**
     c) **Monthly - The conference will be created every month on a specified date or day for the date range. Example: The First Tuesday of every 2 months is the first Tuesday of every other month.**

## Additional Options (if desired)

- Check the box to "Make conference required in attendance statistics to make this a required conference and have the conference counted in the attendance requirements"
- Check the box to "Include this conference on people's "My Schedule" displays this conference on the attendee's My Schedule view in Scheduling-Assignment"
- Check the box to" Add this time to peoples Duty Hour logs records the conference time in an attendee's duty hour logs if the person is marked present at the conference. Usually an assignment definition called Conference is created for use here.

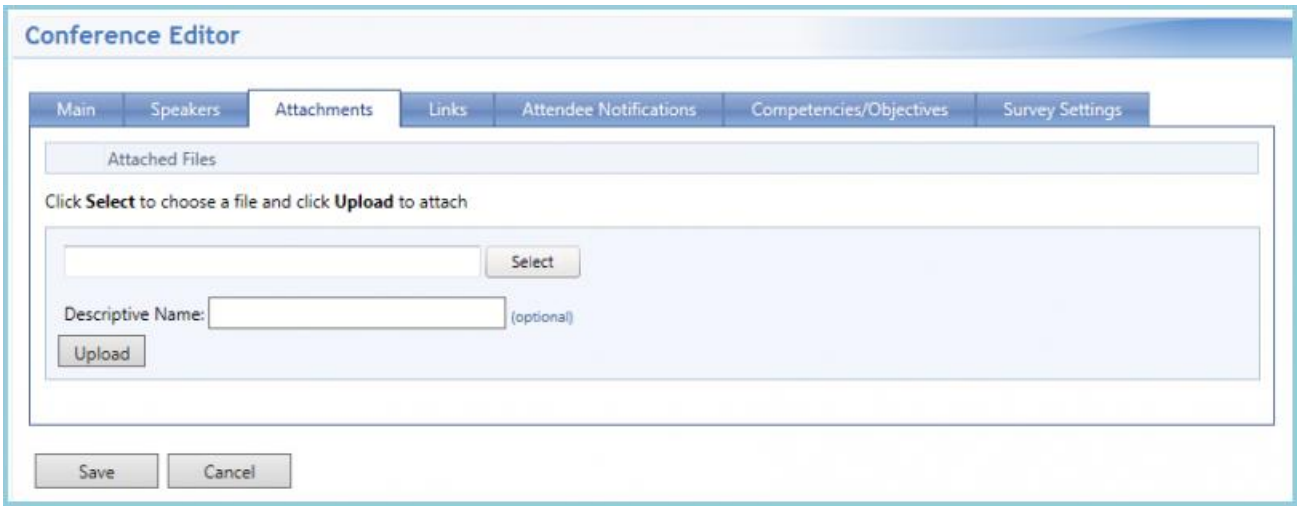
## Speaker Tab

1. Click the Speaker tab
2. Click Add Speaker
3. Select a speaker from the drop-down list. Click Add New to add a new person not in the database
4. Enter the speaker's topic
5. Check the box to send an email notification to the speaker.
   - Enter the speaker's email address
   - You may enter a custom message or use the default message.
   - Enter the number of days prior to the conference date that the email should be sent.
   - To add multiple reminders, click the link to Add Another Notification
6. Click Add Speaker



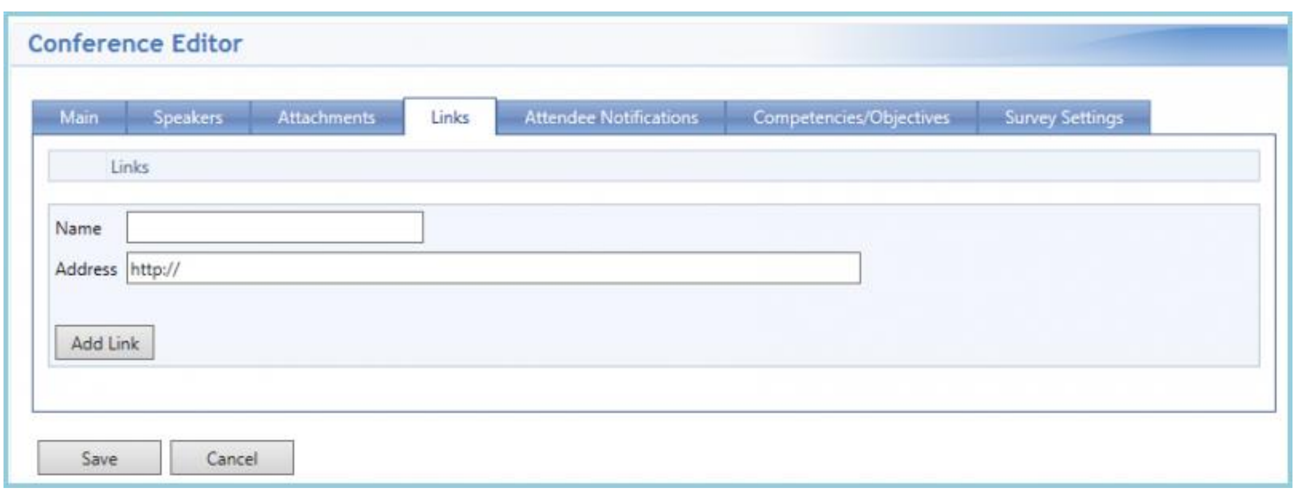
## Attachment Tab

1. **Click the Attachments tab**
2. **Fill in the attachment name**
3. **Click Select to locate the document; when document is selected, click Open. Attachments can be up to 12MB each; there can be more than one attachment per conference. Attachments larger than 12MB will not load.**
4. **Enter the name of the attachment and click Upload**
5. **Option to apply this attachment to other conferences in the recurring series**
6. **Click Save**



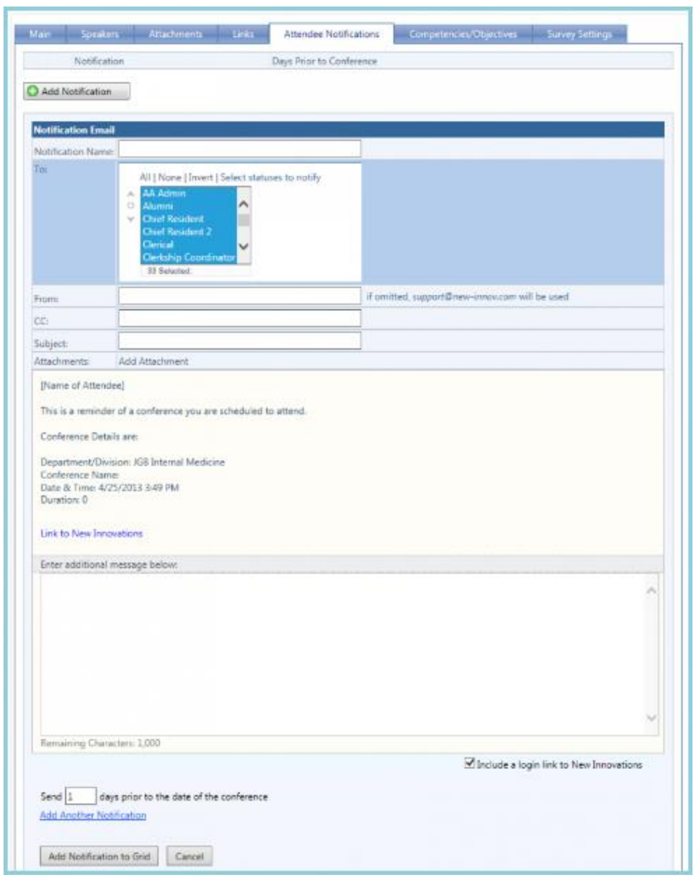

## Links Tab

1. **Click the Links tab**
2. **Type a name for the link**
3. **Type or paste the link in the Link Address text. Remove http:// if pasting the link**
4. **Test the link to make sure it works**
5. **Click Save**



## Attendee Notification Tab

1. Click the Attendee Notification tab
2. Enter the Customize Email Notification Details:
   - Enter a Name for this Notification
   - Enter the Subject of the Email
   - Enter a from address. This is the email address where replies will be directed
   - Include default message – Include a link to New Innovations (optional)
   - Include a custom message instead of using the New Innovations message
3. Click Add Attachment to include a document that can be forwarded to the attendees
4. Select the appropriate statuses to receive the email. Use the Ctrl key to select multiple statuses
5. Enter the number of days a notification should be sent prior to the conference
   - Add further notifications
   - Apply this attendee to additional conferences
6. Click Save or Save and Remain to associate this notification with multiple conferences in the recurring series



## Competencies and Objectives Tab

**CLER Focus Areas**

**The CLER Visit widgets in the Sponsor and Program Administration pages display conferences about the six CLER focus areas that have been attended by residents and faculty. To have that information displayed, check the CLER focus area that applies to this conference. You may check more than one Competencies and Objectives**

**Click the Competencies/Objectives tab. Check the competencies that apply to the conference. Objectives can be associated with competencies and then the objectives can be included in a survey.**
**Any competencies applied to conferences will appear in the Core Competency Report**

1. **Click Add Objectives**
2. **Check the appropriate objectives and then click 'Add Selected Objectives'**
3. **Click the Add New Objectives link to enter a new objective**
4. **Click Save**

## Applying Competencies and Objectives to other conferences in the series

**You can add just the competencies to other conferences by selecting 'Apply Competencies Only'. Or you can add the Competencies and the associated Objectives.**

1. **Select the option 'Apply Objective-Competency Associations'**
2. **Check the 'Apply changes to other conferences in this series'**
3. **Click the Save button**
4. **If any of the items that will be added to other conferences in the series have the same name as the item you are adding, you will be asked whether you'd like to replace the existing item or keep it.**
5. **Check any additional items to include**
6. **Click Save**

**For more information about conference set up go to Help>Tutorial Videos>Conferences-[11.2] Create a Conference**

# Creating Virtual Conferences with Self Check-In

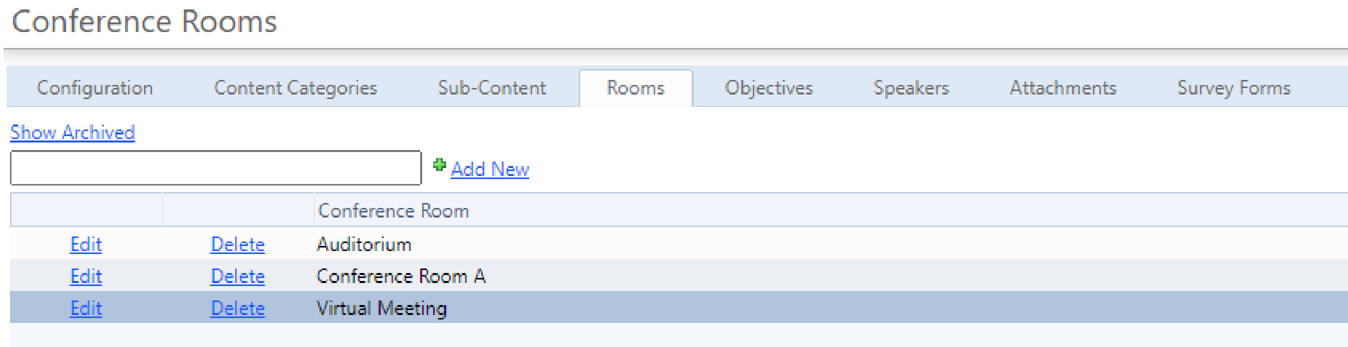
You can make a conference where attendees don't have to scan the QR code to check-in, by sending them a link to the conferences instead. This can be useful if you have conferences that your learners attend via phone.

**1. Pick a link method: by room or by conference**

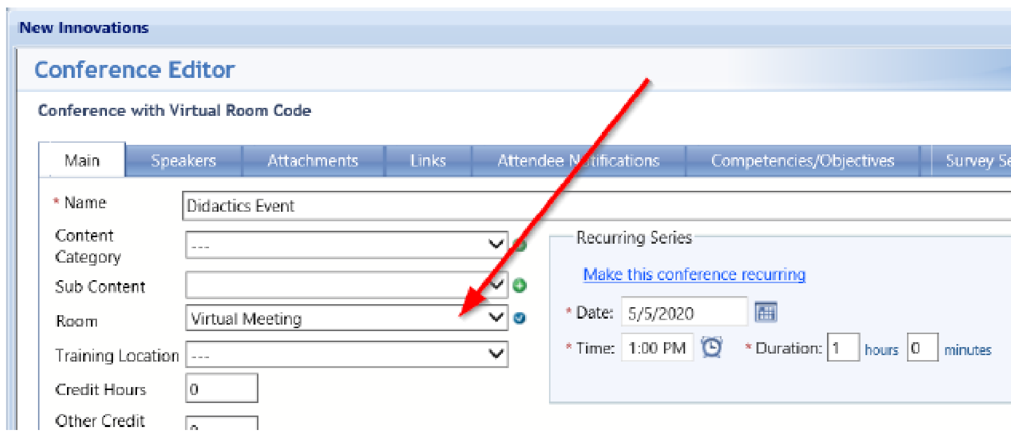
***These methods represent two different ways of managing conference links***

- By Room: **If you select this option, attendees only need one link to access all conferences held in a specific room.**
  ***This prevents you from having to take an extra step to send out links before every conference.***
  **You'll need to create a Virtual Room to access the link to send to attendees.**
  1. **Go to** Conferences **> Setup column,** Rooms
  2. **In the box, type the name (For example: Virtual Meeting or Zoom Room)**

3. **Click** +Add New
4. **You'll see the room name below**




- By Conference: **If you select this option, attendees need a separate link for each conference (continue to Step 2. Schedule conferences in New Innovations**
    1. **Go to** Conferences **>** Manage Conferences
    2. **Set up your Conference(s) as you normally would**
    3. **Click on it then click** Edit
    4. **Choose your new virtual meeting room in the Room dropdown (if you will send the link By Room)**

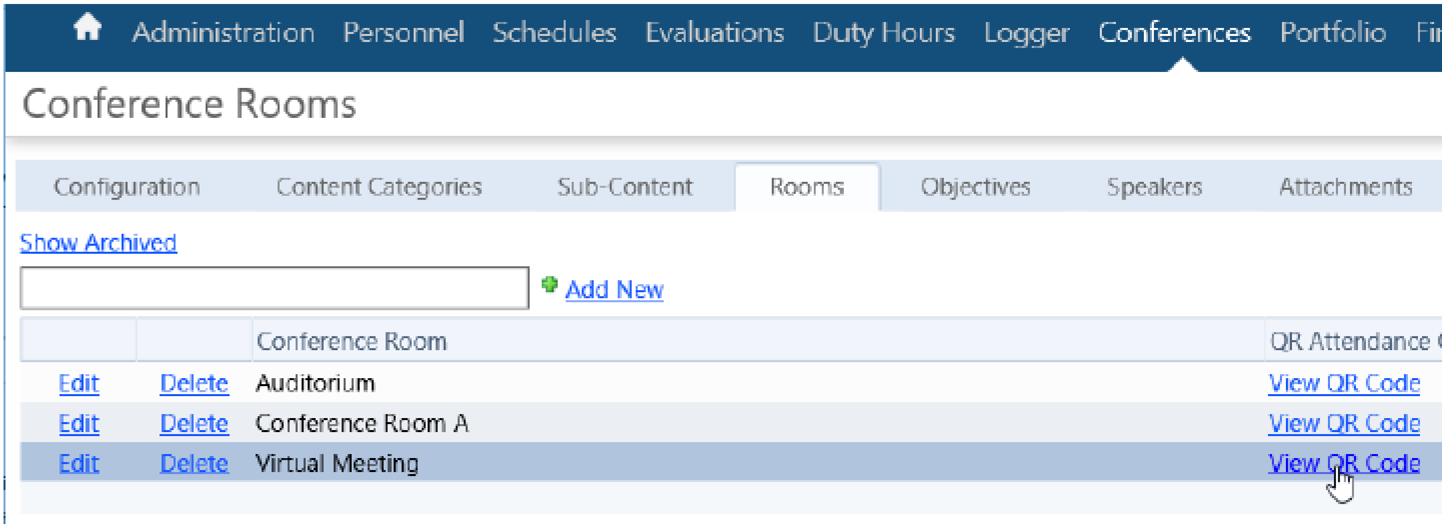



    5. **Choose whether to apply to future conferences (only an option if this is a recurring series)**
    6. Save

# Get conference links

By Room **(see below for By Conference)**

1. **Go to** Conferences **> Setup column,** Rooms
2. **Click** View QR Code **on the right**

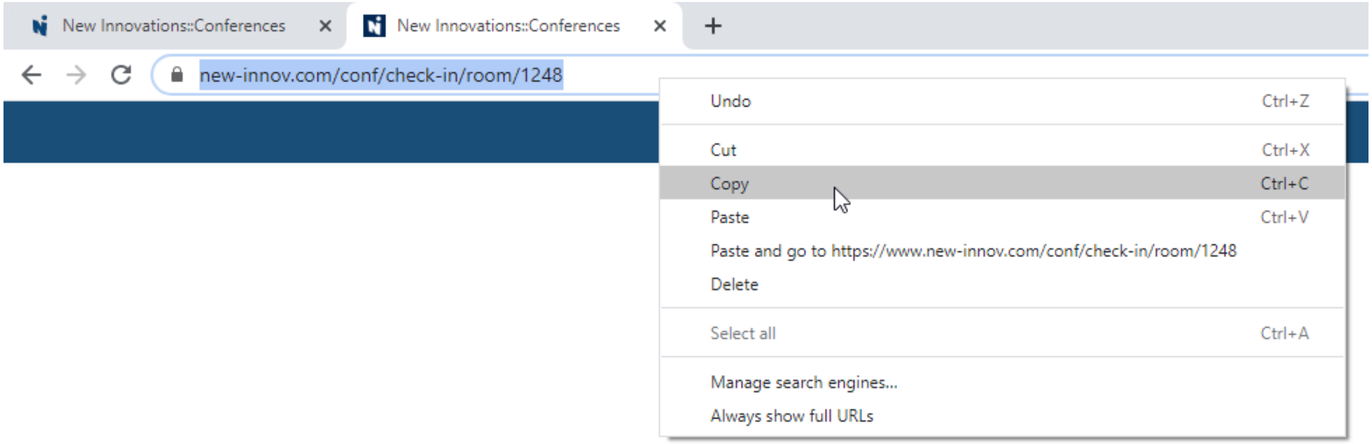



3. **The meeting room QR code opens in a new tab**

**Virtual Meeting**

4. **Click on the QR code**
5. **You land on a new URL. Select the URL web address at the top address bar in the browser.**

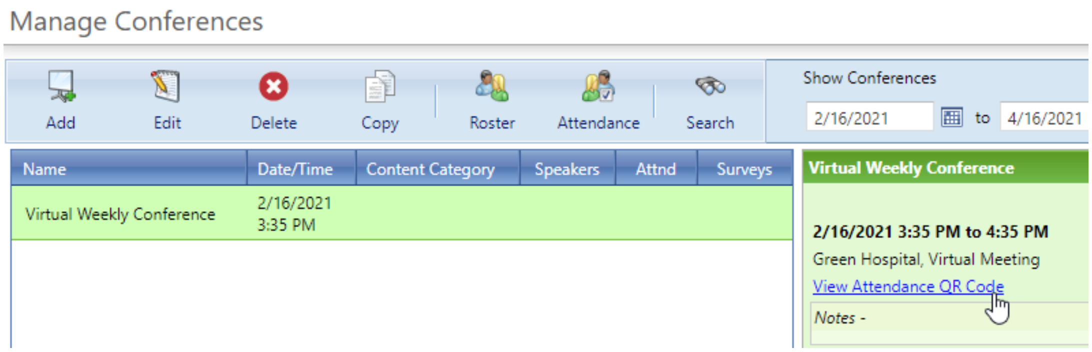
6. **Right-click and choose** Copy




## By Conference

### *Attendees need a separate link for each conference*

1. **Go to** Conferences **>** Manage Conferences
2. **Click on a conference**
3. **Click** View Attendance QR Code



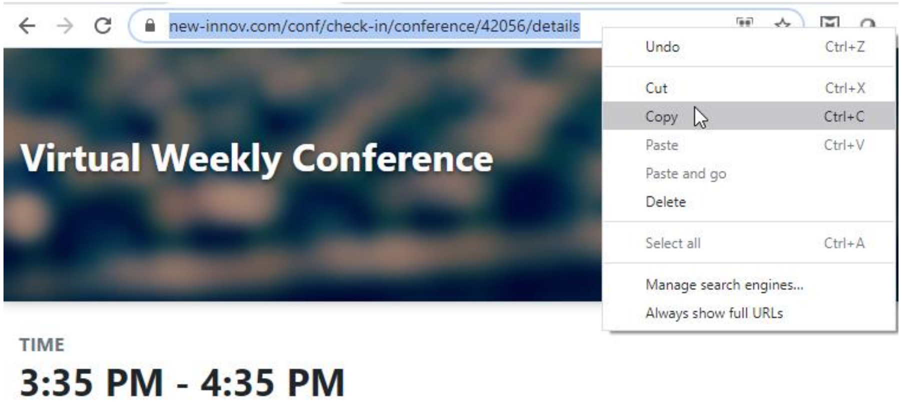

4. **Click on the QR code**

**Virtual Weekly Conference**

TIME
**Tuesday, Feb 16**
**3:35 PM to 4:35 PM**

5. **You land on a new URL. Select the URL web address at the top address bar in the browser.**

6. **Right-click and choose** Copy




7. **Schedule a virtual meeting**
8. **Set up your virtual meeting (in Zoom, Meet, etc.**
9. **If you are sending a calendar reminder such as Outlook:**
   - **Paste the URL for the QR code into the meeting reminder for quick access**
   - **Paste this link to attendee instructions**

*Concerned about attendees checking in but not attending a virtual conference?*

- **Post the conference link in the chat area of the meeting so attendees have to join the meeting first before accessing the link.**

## View a Conference Roster

**The View Roster feature provides no editing capabilities. It simply provides a view of the people assigned to a specific Conference along with their Status Types and Department/Division membership. If they are assigned to a Primary Rotation on the day of the Conference, that Rotation will be listed as well.**


Conference Attendance Roster

Morning Report

3/28/2017 7:00 AM - 3/28/2017 8:00 AM

Edit | Add People | Remove People | Edit Roster Configuration | Rebuild Roster Now

All Present | All Tardy | All Excused | Clear All | Save

| Present | Tardy | Excused | Name | Status | Dept./Div. |
|---|---|---|---|---|---|
| ☐ | ☐ | ☐ | **DuPuy, Ray** | PRG 3 | Emergency Medicine |
| ☐ | ☐ | ☐ | **Grayson, Bernie** | Faculty | Emergency Medicine |
| ☐ | ☐ | ☐ | **Iogistiani, Roberto** | Faculty | Emergency Medicine |
| ☐ | ☐ | ☐ | **Krispo, Lew** | Faculty | DM-Endocrinology |

## To take attendance, add or remove people from the roster

- **Click Take Attendance or Add/Remove People from Roster Manually**

## To change the roster by editing the default configuration that created it

**Click Edit Roster Configuration & Rebuild Roster Automatically**

1. **Go to Conferences > Manage Conferences**
2. **Optional: Enter dates and click Update to restrict the Conferences listed to just those that occur within a specific date range**
3. **Optional: Use the Search Feature to locate the specific Conference you would like to edit.**
4. **Click the conference you want to see the roster for**
5. **Click Roster**
6. **Click View Roster**

## How can a QR code take attendance?

**Attendees can use QR codes to scan and check in to conferences they are scheduled to attend. An administrator can print out the code and post it at the conference site. The learners scan the code and register their attendance by checking in. This is an example of a QR Code by Conference. It includes the name, date, time and location of the conference. If the QR code was posted by room, only the room number would be shown (see example in the Conference by Room section)**

- **QR codes are available for every conference. However, some programs don't want learners to take their own attendance. If that's the case, just don't use the code.**
- **The QR codes in this article are only examples and are not linked to a conference.**
- **To scan a QR code, the attendee needs a QR code scanner installed on their phone. Newer smartphones have a scanner built in, while older ones may need to download a free version.**
- **The QR code Scanning feature in the camera app in IOS is for IOS 11 and up. If someone is using IOS 10 or lower they will have to download a QR code scanning app.**
- **Attendees can check in 15 minutes before a conference begins or anytime during an ongoing conference.**
- **The roster is saved when an attendee checks in. Make sure to review your roster to ensure accuracy.**
- **PLEASE NOTE: Databases using SSO (Single Sign On):& QR Codes do not work with SSO unless using the SAML type. Please check with your IT department to find out what type of SSO your database uses if you are having difficulty with people checking in using the QR code.**

Journal Club

TIME
Monday, Oct 1
11:00 AM to 11:15 AM

ROOM
Conference Room A

**There are two methods of using QR Codes:**

**By Conference:**

**Create a conference and print a QR code for that specific conference. People who scan the code will only have that conference to choose.**

**By Room:**

**Create conferences linked to a room. When the QR code for that room is scanned, people will have multiple conferences to choose: the currently ongoing conference and conferences that start within 15 minutes (of the time scanned)**

**Please note, if a department decides to set up QR codes by conference room, The QR code will be unique to that conference even though multiple programs schedule conferences in that room.**

**In the event, your institution wants to have one affixed QR code assigned to the same room throughout academic year, all departments should have the same naming convention. This means all room names should be identical across all departments (same name, capitalization, spacing, etc.).**

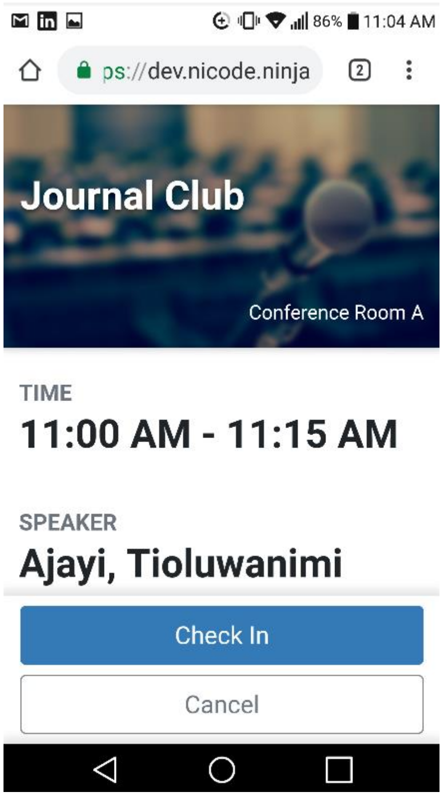
**Example: If the same room is named Main Auditorium in two different departments, this will generate one QR code for multiple conferences in the same room across multiple departments.**

## Taking Attendance

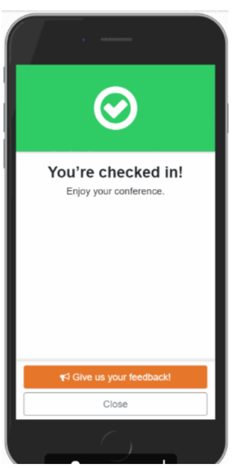
**Attendees can take their own attendance by scanning the code. Then they will be prompted to log in to NI (if they are not already logged in). This requires**

- **Institution Login**
- **Username**
- **Password**

**When logged in, attendees are presented with a screen displaying conferences they are scheduled to attend that are currently in process or that start within the next 15 minutes. They 'check in' for the conference they are attending.**




**This screen confirms check**




**Create QR Code By Conference:**

The QR Code is automatically generated when a conference is created. It is unique to that conference. When you create a series, the QR code is unique for each conference in the series so you should print each conference QR code separately.

Process to Print the QR Code

1. Go to Conferences > Manage Conferences > Add
2. Create the conference. Click here for instructions about creating a conference
3. When the conference is saved, click the link in the Details panel to 'View Attendance QR Code'

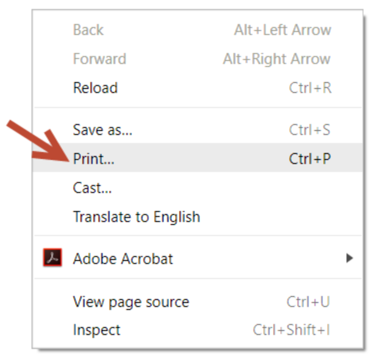
| Name |
|---|
| Support Weekly Meeting |
| Backlog Refinement |
| Journal Club |

4. Right click on the page with the code and use your browser's print function to print the page

Journal Club

TIME
Monday, Oct 1
11:00 AM to 11:15 AM

ROOM
Conference Room A



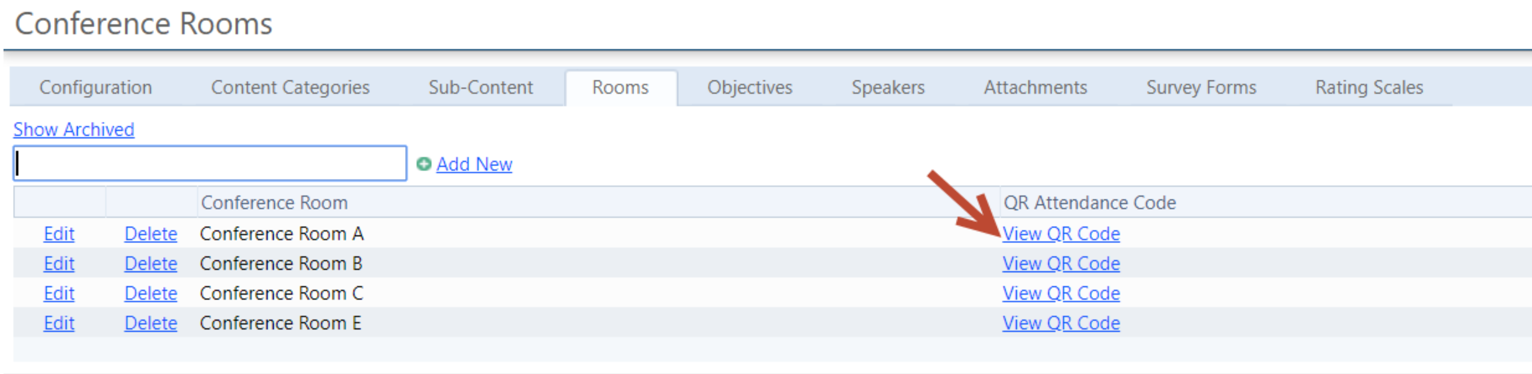

5. Post the printed code at the location where the conference takes place

Create QR Code by Room:

Using QR Code by Room means you can post one QR Code for all conference that occur in that room. When scanned the system looks for all conferences scheduled for that room in your department on the current date. Attendees will see any conference scheduled for the current date that starts within the next 15 minutes.

1. Go to Conferences > Manage Conferences > Add

2. Create the conference. Click here for instructions about creating a conference
3. Go to Conferences > Setup > Rooms
4. Click on the View QR Code for the Conference room.
5. Use the print function from your browser to print the code

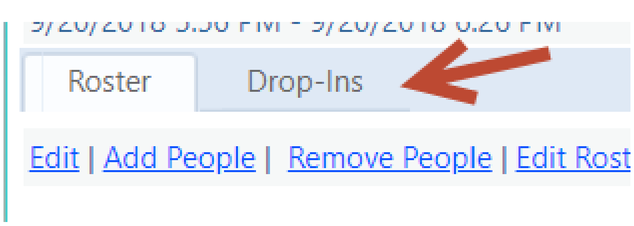



**Note: When the attendee logs in to NI, they are connected to the server, which searches for conferences going on currently or starting in the next 15 minutes in this room. QR Code only needs to be printed once and does not have to be reprinted or re-posted.**

**Conference Room A**

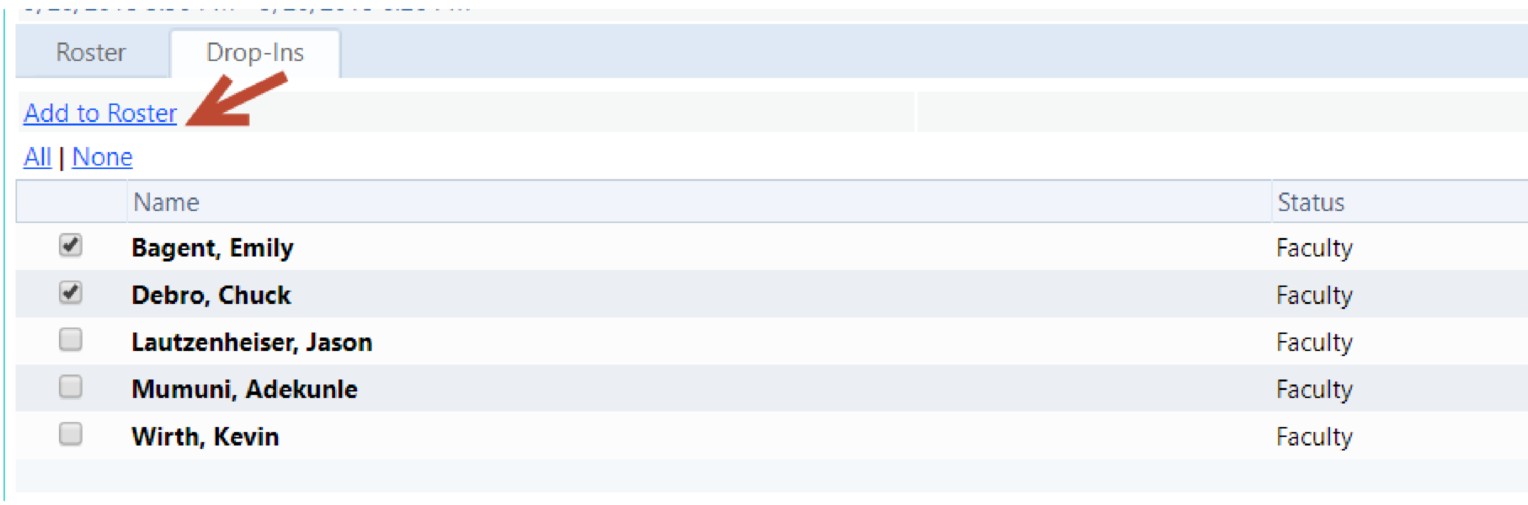
## Drop-Ins

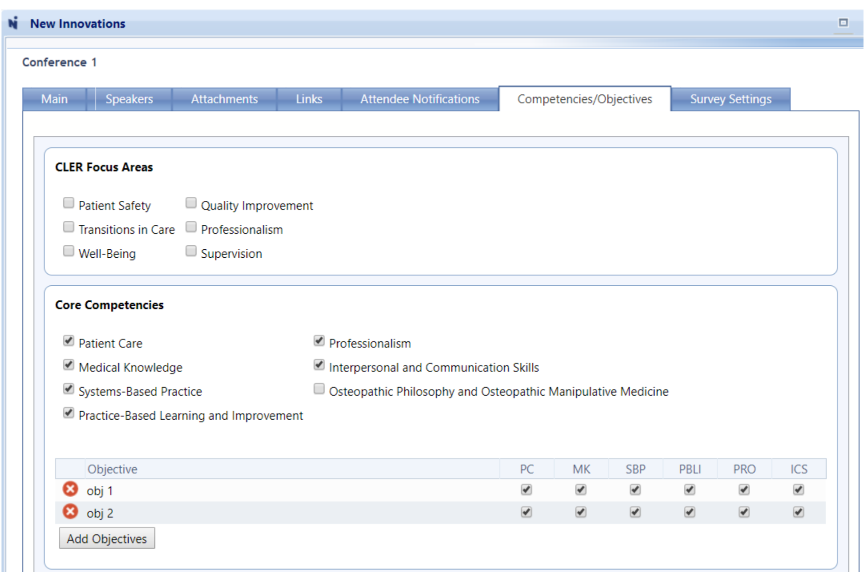
**People who are not on the roster but have and New Innovations profile in your database can scan the code and mark themselves present. These people are displayed on the Drop-In tab on the Roster page and do not count in reports or attendance statistics. Drop-ins will receive surveys, if this feature is setup for the conference. At this time, people who are not in your database cannot add themselves to the roster.**




**Drop-Ins can be added to the roster or left on the drop in tab in order to include them in reports and attendance statistics.**

1. **Click the Drop-Ins tab. The number of Drop-Ins is displayed at the top right.**
2. **Check the people to move the roster**
3. **Click Add to Roster**
4. **Those people can now be marked Present, Tardy or Excused and included in reports.**



# Conferences Surveys-Create and Distribute

Overview

Surveys are used to collect feedback about the content and speakers of your conferences. Administrators create survey forms and add them to a conference. Any number of forms can be created and distributed to conference attendees by status type when applicable. Emails can be sent to conference attendees notifying them that the surveys are available online.

Notes:

- Surveys without questions on them, or questions with no rating responses, cannot be used.
- Surveys that have been attached to a conference can be edited until someone completes the survey. Then the form can be viewed but not edited.
- Multiple surveys can be linked to a conference by clicking Add Another Survey Form and selecting another form from the list. Then select the status or statuses of the people who should receive the new form. Multiple statuses can be assigned to more than one form.

### Default Conference Survey Forms

Go to Conferences > Surveys > Survey Forms to view the two survey forms already created for you to use. These can be edited or you can create your own survey form.

### Create a New Survey Form

1. **Go to Conferences > Surveys > Surveys Forms tab**
2. **Click New**
3. **Enter a name**
4. **Click Save**
5. **Enter instructions in the designated area**
6. **Click Add Question**
7. **Enter the text of the question**
8. **To have the conference objectives appear on the form check the box 'Link this question to Conference Objectives'**
    - **'Display all Objectives under this Question' lists all objectives for the conference in the question**
    - **'Repeat this question for each Conference Objective' creates this question for each objective. If there are 3 objectives in the conference, this question will be repeated 3 times**

## Responses

1. **Select the appropriate response: None, New Response or Existing Response**
2. **Elect to display the responses horizontally or vertically on the page**
3. **Enter a label for each response choice**
4. **Enter a name for the response**
5. **If using an existing response, select the response from the drop-down list**
6. **Check the box to Include a comment box**
7. **Click Save**

## Add a Survey to a Conference

1. **Go to Conferences > Manage Conferences**
2. **Click on a conference**
3. **Click Edit**
4. **Click the Survey Settings tab to add a survey to a conference**
5. **Select the appropriate survey from the drop-down list**
6. **Choose who should receive the form by status**

## Date Options

1. **Enter the number of days after the conference that the survey will be available**
2. **Enter the number of days after the conference that the completed survey is due**

# Survey Distribution

**Choose whether the survey should be distributed to the entire roster or only those that have been marked present on the attendance roster. If you choose to distribute to 'only those marked as present', those people will *not* have the option to 'skip' the survey. This applies to manual attendance taking or attendance taken using QR Codes.**

- **Distribute to all people on the roster, whether they attended the conference or not**
- **Distribute to only those people marked present on the roster**

## Attendee Emails

**Notifications and reminders can be sent to people with Surveys to complete.**

1. **Check to have emails sent to attendees when the survey is available Immediately after the conference**
2. **In consolidated daily email**
3. **Check to have reminders sent to people who have not completed the survey by the due date**
4. **You may also send a recurring email reminder. Enter how often the reminder should be sent**

## Administrative Emails

**You can send conference attendees an email to let them know when the survey is available for completion. You can choose to send this email immediately after the conference ends or include it in the consolidated email the day after the conference.**

**You can also send reminders to people who have not filled out the survey by the due date. This email is sent in the pattern selected, such as every 3 days, and is included in the daily consolidated email.**

**Administrators can receive an email confirming the attendees have been notified of the survey availability. They can also receive an email with a list of people who have not yet completed a survey by its due date.**

1. **Check to receive an email when initial emails are sent**
2. **Check to receive an email with a list of people who have not completed surveys by the due date**
3. **Enter the email address of the person to receive these emails**
4. **Click Save Survey Settings**

## Add Survey to More Conferences in the Series

**Before saving the conference, check the box to"Apply changes to additional conferences in the series"**

**Check those that should have the survey linked to it**

**Click Apply**

**For more information about conference set up go to Help>Tutorial Videos-Conferences-[11.6] Conferences-Surveys**

# Completing Surveys

**Once the survey settings are saved, the survey will be available at the conference end time. If enabled, attendees can receive an email notifying them that the survey is available. A link to the survey is also provided in the Notifications panel of each attendee's Home Page that takes them to the list of pending surveys they have been asked to complete.**

If an attendee is unable to complete the survey before it expires, the expiration date in the survey setup can be adjusted to make the survey available again. Just change the accessible date in the conference survey settings for that particular date and save.

Administrators can also complete a survey for an attendee by going to Conferences > Surveys > Survey Status and clicking Complete next to the appropriate survey.

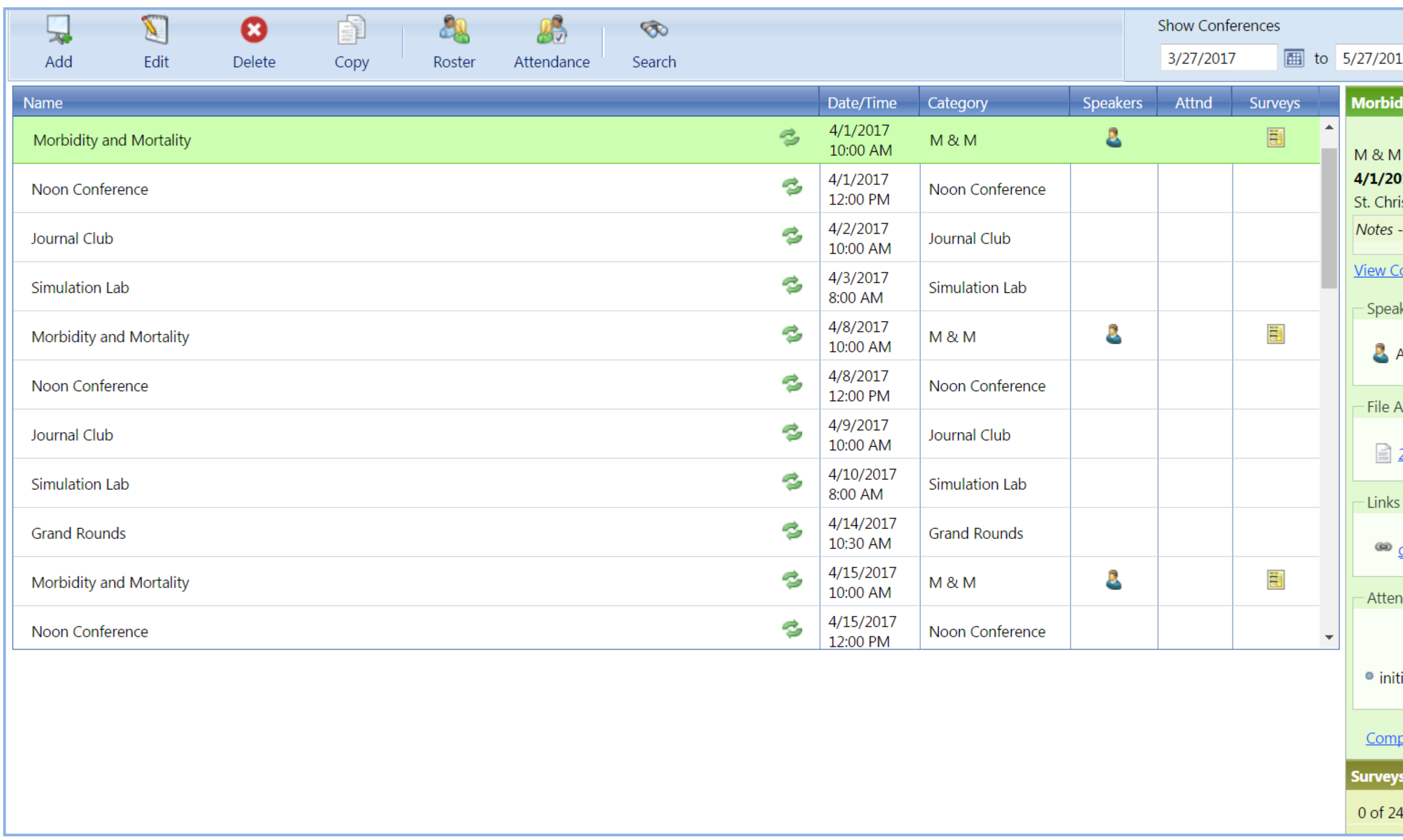
## Speakers

Speakers can view surveys about them but they are anonymous. Administrators can see who completed the survey. The only exception is when the administrator is also the speaker. In that event, the administrator cannot view the name of the people who filled out surveys.

Help>Tutorial Videos-Conferences-[11.6] Conferences-Surveys

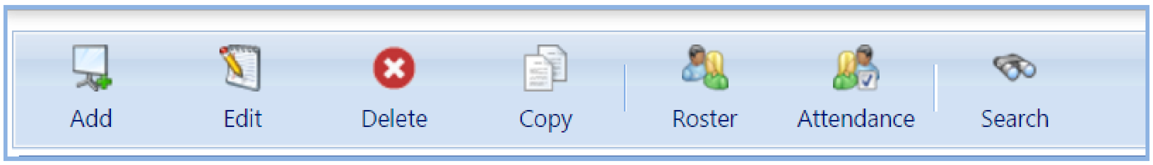
# Managing Conferences

This page is used to add new conferences and view and edit existing conferences. You can see at a glance which conferences have a speaker (people icon), have attendance taken (blue check), and have a survey attached (yellow paper icon).

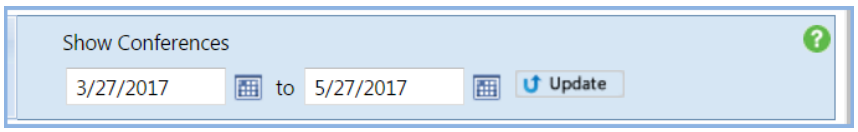


**Most actions can be accessed from the task bar at the top of the page.**

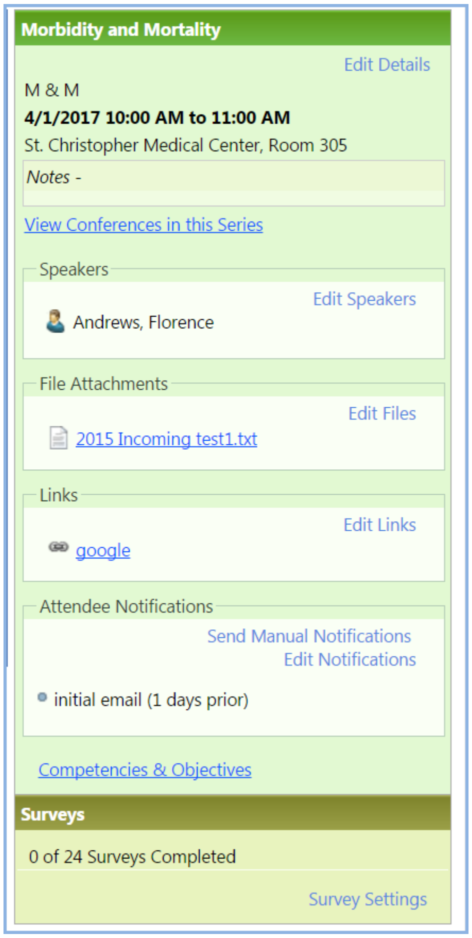
- **Add - Add a new stand-alone or series of conferences**
- **Edit - Edit the details of a conference**
- **Delete - Delete a conference. A conference cannot be deleted if attendance has been taken.**
- **Copy - Copy a conference to your department. Conferences cannot be copied to other departments**
- **Roster - View the Roster configuration for this conference or series. The configuration can be changed for just this conference or series. Make selections and then save and rebuild the roster using the prompts at the bottom of the roster configuration page.**
- **Attendance - Take attendance for this conference, add or remove people from the attendance roster.**
- **Search - Search for a specific conference**



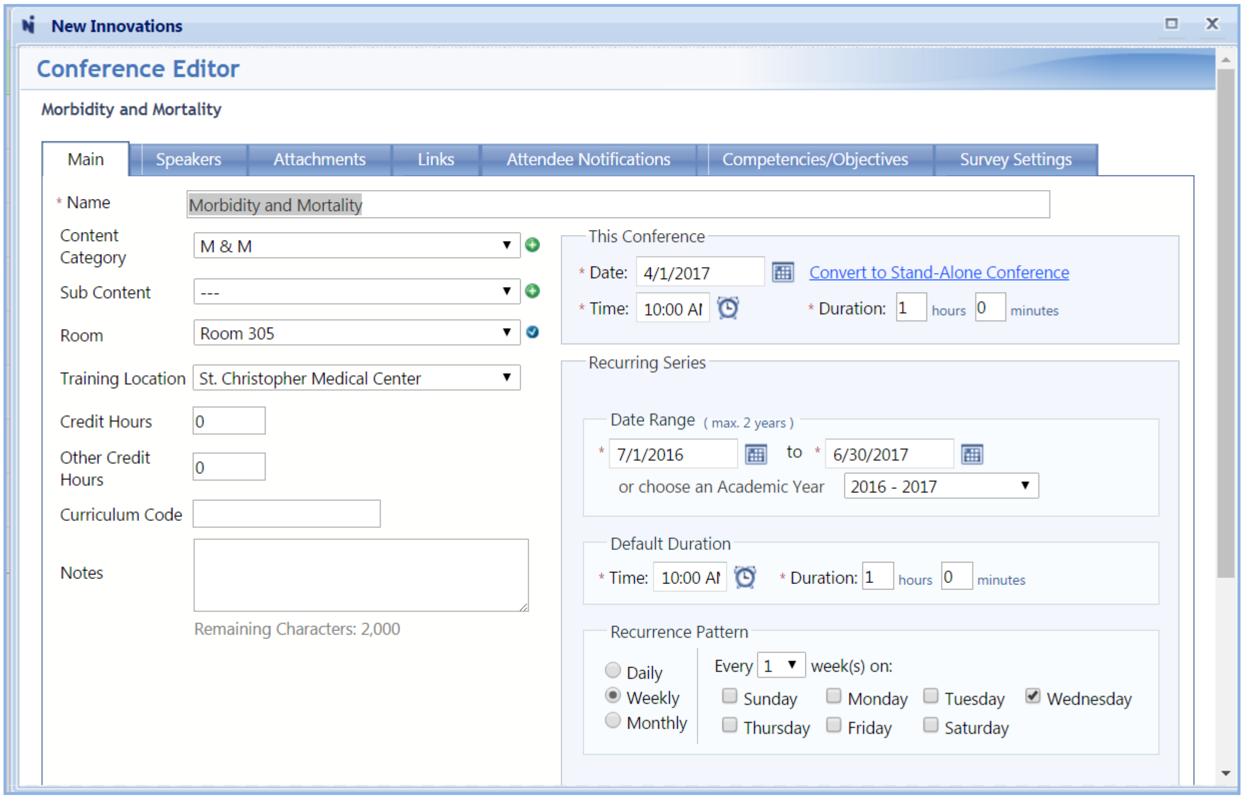

**Adjust the dates of conferences to view at the top right of the page. Enter the date range and click Update.**




**The green panel on the right of the page provides basic information for the selected conference. View information about the speaker, file attachments and links, attendee notifications, competencies and objectives and surveys. You can also view the survey settings and see how many surveys have been completed.**



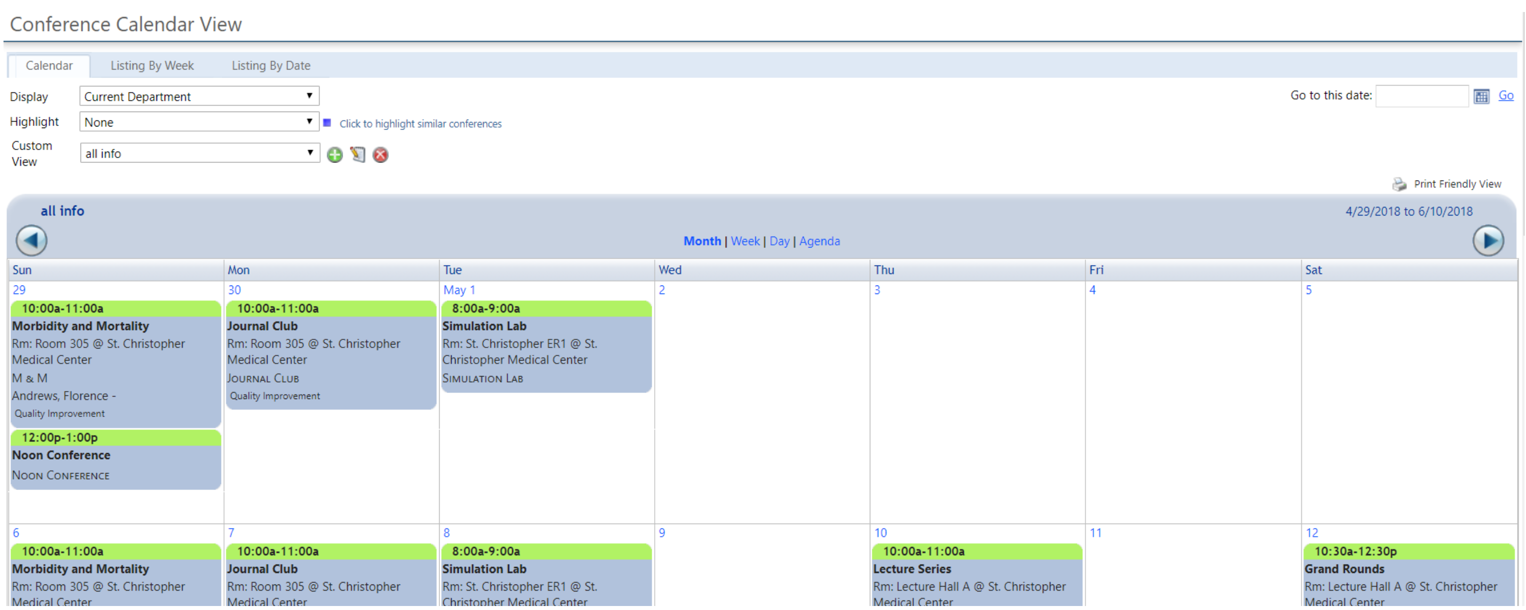

**Click Edit Details to go to the Conference Editor where you can edit the name, content category, sub content, etc. You can edit the date and time. However, if this is a recurring conference, changing the date creates a new series and ends the original conference. The series can also be converted to a stand along conference here.**




# Conferences - Calendars

## View Conferences Calendar

1. **Go to Conferences > Calendar**
2. **Select View options from the drop-down lists**



**View Options and Controls**

- **Display - view conferences from the Current Department, All Departments or My Scheduled Conferences.**
- **Highlight - mark all conferences according to Category, Department or Recurring Series to distinguish them on the calendar. Click the icon adjacent to any conference and all others belonging to the same group will be highlighted Click Remove Highlighting to turn off this feature.**
- **Custom View - choose from a set of specialized calendar views that have been configured by authorized administrators to display specific conference information. If no Custom Calendar Views have been configured there will be no selections available. Administrators interested in setting up Custom Views should review Configure Conference Calendar Custom Views for further details.**
- **Go to this Date - enter a date and click Go to quickly focus the calendar on a specific date.**
- **View Conferences in a List - View your conferences in list form including the names, dates and categories of each conference by going to Conferences > Calendar > 'Listing by Week' or 'Listing By Date' tab.**

**Click on a conference to see details**

| Conference | Date | Time | Category | Attachments/Links |
|---|---|---|---|---|
| **Grand Rounds** | 10/23/2012 | 1:04 PM - 2:04 PM | Grand Rounds | |
| Department/Division: **Pediatrics** | | | | |
| **Grand Rounds** | 10/24/2012 | 1:04 PM - 2:04 PM | Grand Rounds | |
| Department/Division: **Pediatrics** | | | | |
| **Grand Rounds** | 10/25/2012 | 1:04 PM - 2:04 PM | Grand Rounds | Grand Rounds.docx |
| Department/Division: **Pediatrics** | | | | |
| **Grand Rounds** | 10/26/2012 | 12:00 PM - 1:00 PM | Grand Rounds | |
| Department/Division: **Pediatrics** | | | | |
| **Grand Rounds** | 10/26/2012 | 1:04 PM - 2:04 PM | Grand Rounds | |

**Note: On the 'Listing by Week' tab, the forward and backward arrows only change the End Date of the date range shown.**

## Print Friendly View

1. **A Print Friendly View link appears in the upper right corner of the Conference Calendar. Clicking the Print Friendly View option will refresh the calendar page with the standard header controls suppressed and the addition of a text size control to help adjust the calendar information for print output. Click the Text Size control to increase or decrease the font size for the entire calendar. Click Normal View to return to the standard calendar view.**
2. **Text Size adjustments will effect print output only. Our Export to PDF will not pick up text size changes, however any PDF print option located on a user's workstation will capture text size changes. PDF printer options are commonly available and often free of charge. An internet search for 'PDF printer' will immediately highlight many options for adding this option to your system. For institutional workstations, consult your information technology staff, they often have readily available PDF software they can install or recommendations best suited to your network.**
3. **View Conferences for the Week**

- Go to Conferences > Calendar
- Click the Listing by Week tab
- Change the number of days in the box, if necessary, check the Show Details check box and select either the ascending or descending option.
- Click Update
- Optional: Change the display to show conferences in the current department, all departments, or my conferences, which are conferences you are on the roster for

4. Click the links on either side of the date range to change the number of days' worth of Conferences to display in the Conference list. 0 days displays Conferences scheduled on the first day of the date range. Only Conferences scheduled within the date range can be displayed regardless of the number of times you click a - or + link.

By default, each Conference's name, Department/Division, Date, Time, and Category are displayed. The Show Details option also displays:

- Sub-Content
- Room
- Core Competencies
- Speaker
- Credit Hours
- Other Credit Hours (OCH)
- Training Location
- Curriculum Code

View Conferences by Date

1. Go to Conferences > Calendar
2. Click the Listing by Date tab
3. Enter a date range, check the Show Details check box, and select either the ascending or descending option. Then, click Update

Optional: Change the display to show conferences in the current department, all departments, or my conferences, which are conferences you are on the roster for

By default, each Conference's name, Department/Division, Date, Time, and Category are displayed. The Show Details option also displays:

- Sub-Content
- Room
- Core Competencies
- Speaker Credit Hours (CH)
- Other Credit Hours (OCH)
- Training Location
- Curriculum Code

**Notes**

**The asc (ascending) and desc (descending) option lists the Conferences by ascending or descending date.**

**A green circle with a check mark in it indicates a Required Conference**

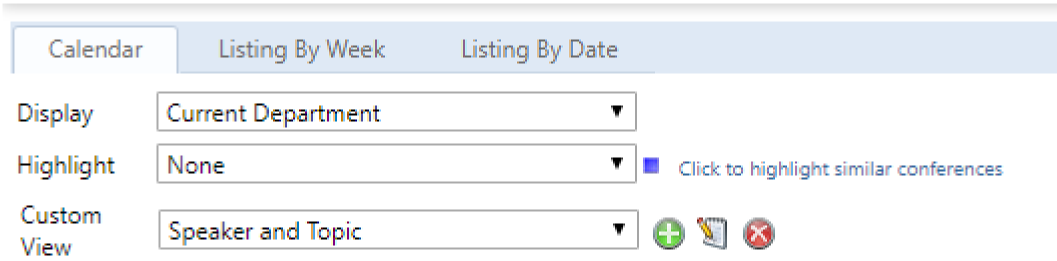
**A red square with an "x" in it indicates a Conference that is not required**

**For more information about conference set up go to Help>Tutorial Videos>Conferences- [11.4] Conferences-Create Custom Views**

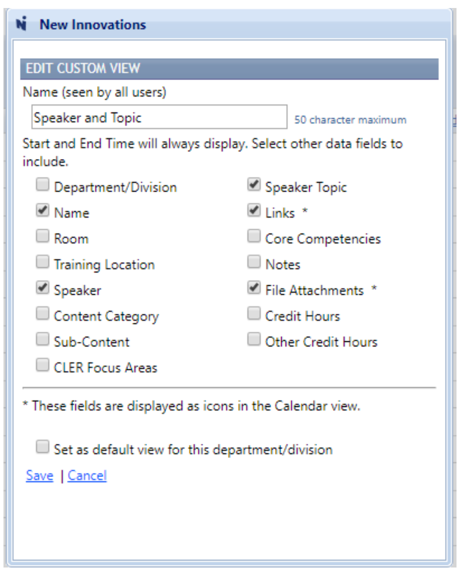
# Creating Conference Calendar Custom Views

## Create Custom View

1. **Go to Conferences > Calendar**
2. **Click the green + icon to the right of the Custom View dropdown list**




3. **Enter a name for the view**
4. **Select the items to display**
5. **You may set this view as the default view for people in your department by checking the box**
6. **Click Save**

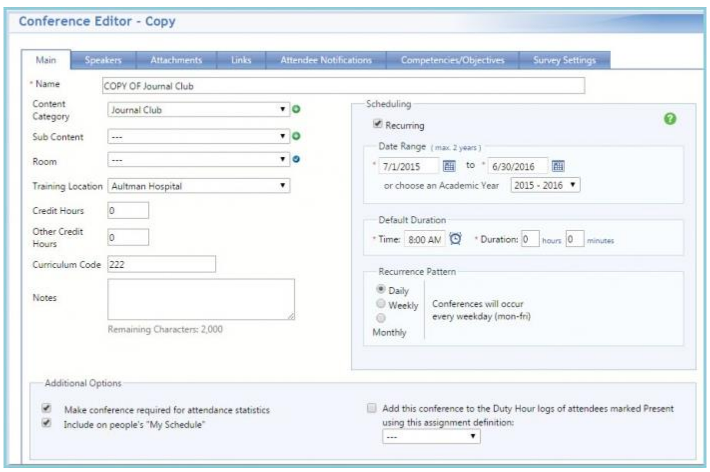



7. **Edit a custom view by clicking the pencil/paper icon. Delete a custom view by clicking the red X icon beside the name (see above illustration).**

## Copying Conferences

**You can easily copy your recurring conferences to the next year along with their notifications and surveys. When the roster is created, it will pick up the next year's statuses and rotations for the people on the roster.**

1. **Go to Conferences > Manage Conferences**
2. **Click on the conference to copy**
3. **Click on the Copy icon**
4. **Edit the title if needed. You might want to take out the words 'COPY OF…'**
5. **Check the box to make the copy a 'Recurring' conference**
6. **Enter a date range or use the academic year to set the dates for the conference**
7. **Make necessary changes to the duration or recurrence pattern**
8. **Information in the original conference will be copied to the new conference. Click on a tab to review the contents.**
9. **When you are satisfied with the configuration, go to the bottom of the page and select 'Use default roster configuration' to pick up new information, such as the residents' new status, rotation and any new people in your program.**
10. **Click Save**




**The instructions below allow you to make changes to an existing conference, such as changing a date or time, adding a speaker or attaching a document.**

1. **Go to Conferences > Manage Conferences**
2. **Select a conference (Note: Adjust the date range, if necessary.)**
3. **Click Edit**
4. **Select the appropriate tab**
5. **Make the necessary changes**
6. **If you want this change to affect all conferences in a recurring series, check the box for 'Apply changes to other conferences in this series.'**
7. **Click Save**

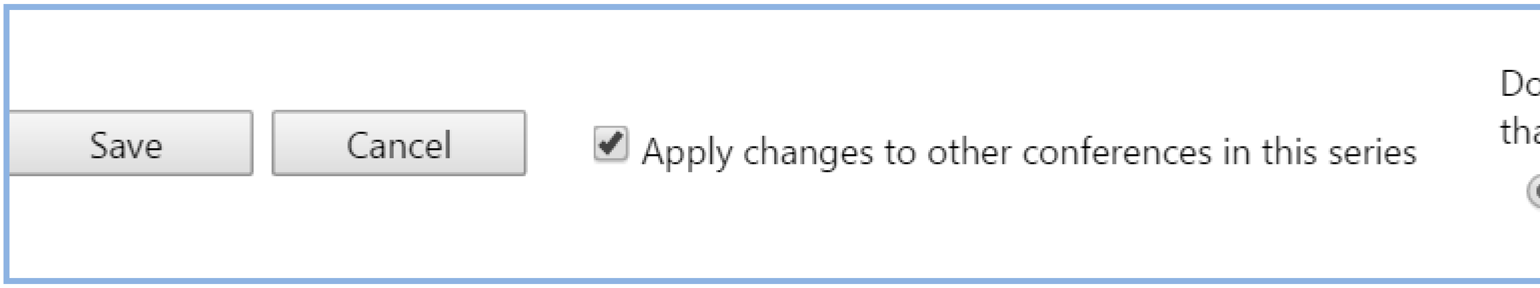
## Editing Recurring Conference Series

**The instructions below allow you to make changes to an existing conference, such as changing a date or time, adding a speaker or attaching a document.**

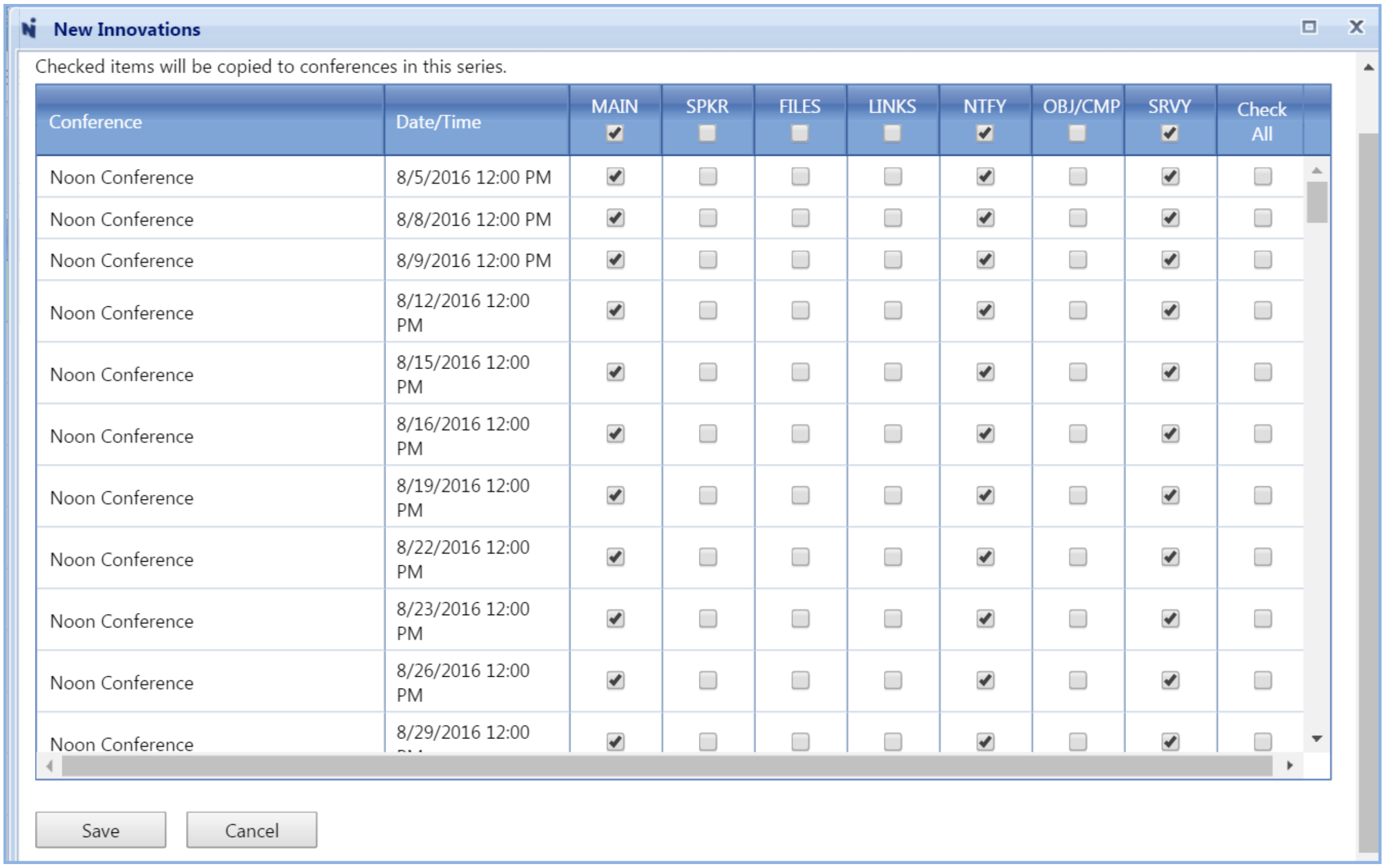
**Note about changing the recurring pattern or date range:**

**Changing the recurring pattern or date range actually resets the old series pattern to a new recurring series (because you've technically made it a different conference series) Any conferences in the former series that have attendance taken and saved will be converted to 'stand-alone' conferences.**

1. **Go to Conferences > Manage Conferences**
2. **Select a conference (Note: Adjust the date range, if necessary.)**
3. **Click Edit**
4. **Select the appropriate tab**
5. **Make the necessary changes**
6. **If you want this change to affect all conferences in the series, check the box for 'Apply changes to other conferences in this series.' Only conferences for today and after today's date are changed. When the box is checked, you decide if you want to overwrite some information in the series. If you select No, just click Save.**
7. **If you select Yes, you are presented with the remaining conferences in the series (after today's date).**




8. **Check information to copy or uncheck items to leave out.**




**If you add a note when you create the series, it copies to each conference. However, if you add a note to an existing conference, the note only appears for that one conference.**

**If you want to add a note and have it appear for the rest of the conference series do this:**

1. **Select the conference**
2. **Add the note**
3. **Check the box to 'Apply changes to other conferences in the series'**
4. **Click Save**
5. **Check the Main column for each conference to add the note to**
6. **Click Save**

**Note: you can only do this for conferences that occur in the future. If you want the note to appear for past conferences, you'll have to add those individually.**

## Deleting (Cancel) Conferences

1. **Go to Conferences > Manage Conferences**
2. **Select a conference.  Adjust the date range, if necessary.**
3. **Click Delete**
4. **If it is a recurring conference, select either delete only this conference or delete the entire recurring group/series**

5. Click Delete

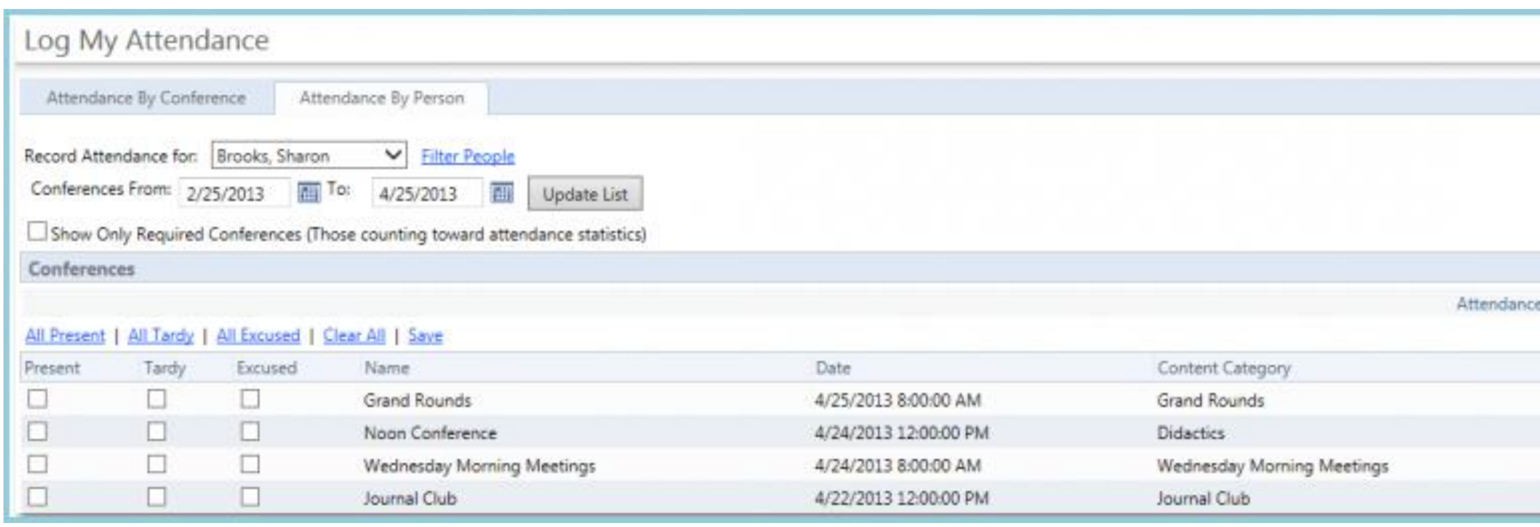
## Taking Conference Attendance

**Take Attendance by Conference**

1. Go to Conferences > Record Attendance
2. Optional: Set date range and click Update to filter conferences by date
3. Optional: Check Show Required Conferences Only
4. Click the appropriate conference
5. Check the appropriate names as present, tardy or excused. Don't check anything to indicate that a person was absent
6. Click Save
7. Click OK

**Take Attendance by Person**

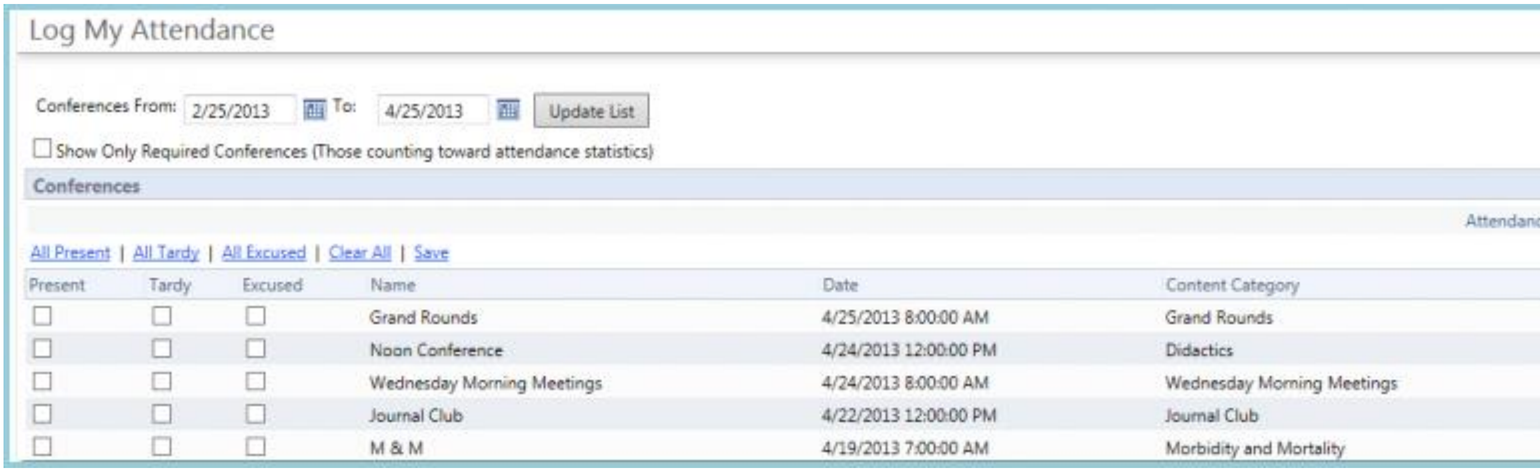
1. Go to Conferences > Record Attendance
2. Click the Attendance By Person tab
3. Select a person
4. Optional: Set date range and click Update to filter conferences by date
5. Optional: Uncheck Show Required Conferences only
6. Mark attendance as appropriate for the selected individual as present, tardy or excused. Check nothing if the person was absent
7. Click Save
8. Click OK




**Take My Own Attendance**

**An individual must be assigned a Privilege Level of a least a 3 in the Conferences module of his or her Department/Division to take his or her own attendance.**

1. Go to Conferences > Record Attendance
2. Optional: Set date range and click Update to filter conferences by date
3. Optional: Uncheck Show Required Conferences only
4. Click on a conference
5. Mark attendance as appropriate.
6. Click Save
7. Click OK




**Copy Attendance Records**

1. Go to Conferences > Record Attendance
2. Click the 'copy attendance records' link.
3. Optional: Set date range and click Update to filter conferences by date
4. Optional: Uncheck Show Required Conferences only
5. Optional: Check Show only Destination Conferences having no attendance records
6. Select the Conference with attendance records you want to copy and the Conference you want to copy the attendance records to (Destination Conference)
7. Click Save

**Delete a Conference with Recorded Attendance**

1. Go to Conferences > Record Attendance
2. Click the Attendance By Conference tab
3. Optional: Set date range and click Update to filter conferences by date
4. Optional: Uncheck Show Required Conferences only
5. Click the Name of the Conference associated with the roster you would like to clear.
6. Click Clear All
7. Click Save

Notes about Viewing Attendance Roster

- Records that have not had attendance saved will be have a question mark in the last column on the Roster page
- Records where attendance has been saved will be have a green bullet in the last column
- Once attendance has been recorded, the Clear All link removes attendance records.
- If a box is not checked and the roster is saved, the individual will be marked absent
- A person can have multiple columns checked. For example Tardy and Present, or Tardy, Present, and Excused
- A person marked as both Present and Excused for a conference receives an extra credit for that conference in the attendance reports. Specifically, the % Attended statistic is calculated using this formula: (% attended = Present/(# Required - Excused) * 100). Therefore, a person who is marked present for two required conferences and also as excused for one of them receives a % Attended statistic of 200% (2/[2 -1] * 100 )
- If conference attendance that is marked as Present or Present and Tardy is configured to be entered as a Duty Hour log automatically BUT if the Conference occurred during a locked Academic Year interval, the log entry will not be entered into Duty Hours
- The only way to remove an individual's attendance statistics for a Conference is to remove the individual from the roster. If you add them back to the roster, be sure to check an option for attendance

For more information about conference set up go to Help>Tutorial Videos>Conferences>[11.3] Taking Attendance & Manage conferences

# Managing Conference Surveys

## Completing Surveys

Once the survey settings are saved, the survey will be available at the conference end time. If enabled, attendees can receive an email notifying them that the survey is available. A link to the survey is also provided in the Notifications panel of each attendee’s Home Page that takes them to the list of pending surveys they have been asked to complete..

If an attendee is unable to complete the survey before it expires, the expiration date in the survey setup can be adjusted to make the survey available again. Change the accessible date in the conference survey settings for that particular date and save.

## Manage Completed Surveys

Use the Survey Status page to manage surveys after distribution. Administrators can go to Conferences > Surveys > Survey Status to do the following:

- Complete surveys for others
- Delete survey responses - Deletes the survey responses, then replaces it with a blank survey. Since the surveys are dynamically created according to the survey settings and roster, the actual survey cannot be deleted. Residents, however, can 'opt out' of a survey, removing it from their queue.
- Check the Hide Expired filter to exclude the expired survey responses

- View completed surveys

The columns can be filtered by using the funnel icon.

Surveys that have been skipped (Opt Out) by the recipient cannot be returned to them.

Notes

- Conferences cannot be deleted if attendance has been taken. Clear the attendance roster and then delete the conference.
- Notices are not sent to attendees when a conference is deleted or canceled. It is simply removed from the calendar view.

## Configuring Default Roster & Attendance Requirements

To limit the number of manual conference additions and removals, configure the roster and requirements.

## Edit Default Roster Configuration

Edit the Default Roster Configuration to redefine how people are selected to be assigned to a Conference when it's created. Rosters for existing Conferences will not be affected.

1. Go to Conferences > Setup > Roster
2. Select one of two ways to build your roster configuration:
1. Build Attendance Roster By Rotation And Status - This method builds the roster based on the status of people scheduled on rotations selected here. The system goes to the block schedule and only picks up people with the statuses selected on rotation selected. An example of a time when you would use this option is when residents scheduled on a surgery rotation should attend M & M conferences.
2. Build Attendance Roster By Department Personnel - This method builds the roster by including all of the people currently in your department with the selected statuses. The status is determined by the resident's training record. If a training record does not exist, such as with faculty, then the system utilizes the block schedule to check for statuses. If the individual does not have a training record nor a block schedule, then the system checks the demographic record for the status.

Check the box for Include People from My Divisions (if applicable) on Attendance Roster when it is automatically built.

## Filter the List of People

Click the Filter by Status and/or the Filter by Rotation link if you wish to restrict the people listed by their assigned Status Type or Rotation. Select one or more Status Types or Rotations, and then click the Update list of potential people above link.
If you filter by Rotation, click the only show rotations from [Active Department/Division Name] if appropriate.

Add/Remove by Editing Default Roster Configuration

Changing a specific Conference's Default Roster configuration only changes the Default Roster Configuration for that Conference (unless the conference is built in a recurring series; you'll have an option to apply changes to other conferences as well). Other Conference rosters will continue to be based on the original Default Roster configuration.

1. Go to Conferences > Manage Conferences
2. Optional: Set date range and click Update to filter conferences by date

3. **Optional: Uncheck Show Required Conferences only**
4. **Click the Name of the Conference you wish to add or remove people from**
5. **Click Roster**
6. **Configure the roster as desired**
7. **Optional: Check the box for Save the Roster Configuration and Rebuild the Rosters for All Conferences in this Recurring Series**
8. **Click the Save Configuration and Rebuild Roster link.**

**Notes:**
**A red asterisk (*) Indicates that attendance has already been taken and at least one person is marked as present, tardy, or excused.**

**If attendance has been taken for an individual, that individual and his or her attendance will remain on the roster.**

**If attendance has been taken AND if the Conferences module has been configured to add hours to attendee's Duty Hours after they were marked present AND an individual has confirmed/approved those logged hours in the Duty Hours module, then that individual cannot be removed from the roster.**

## Edit Attendance Requirements

1. **Go to Conferences > Setup > Requirements**
2. **Edit the requirements as desired**

- **Option 1: Set Requirements with a Departmental Percentage - Change the percentage required and click Save Departmental Requirements**
- **Option 2: Set Requirements by Status Type**
- **Option 3: Set Requirements by Status Type and Content Category**

**For Options 2 and 3, use the Add Selected Requirement and Delete Selected Requirement links to edit your attendance requirements.**

## Manually Adding / Removing Someone on Conference Roster

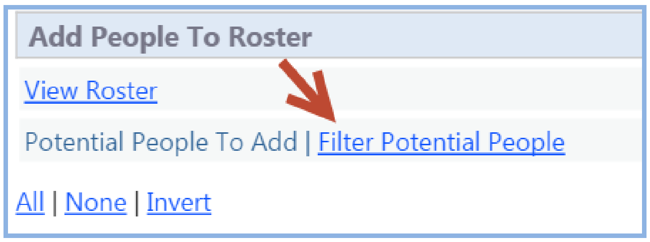
**You can avoid some of this manual work by configuring your default roster and attendance requirements**

## Add Person

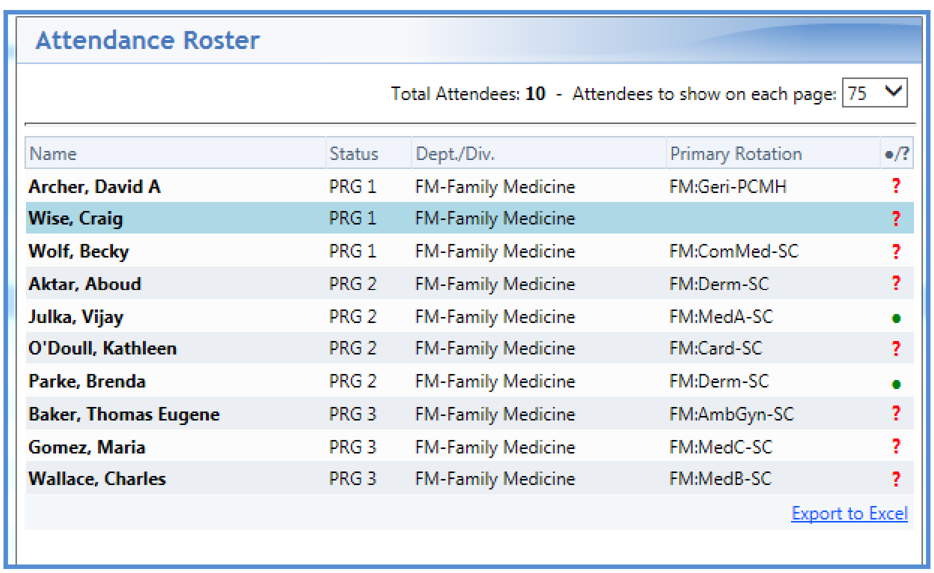
**From Your Own Department/Division**

1. **Go to Conferences > Manage Conferences**
2. **Optional: Enter dates and click Update to restrict the Conferences listed to just those that occur within a specific date range**
3. **Click on the appropriate conference**
4. **Click the Attendance icon in the top banner**
5. **Click Add People**


6. **Click Filter Potential People to find people from your Department who are not on the default roster configuration.**




7. **Check the names of people to add to the roster**
8. **Optional: Check the box to 'Add the Selected People to All Conferences in this Recurring Series from 'Date' to 'Date''**
9. **Click Add Selected People**
10. **Click OK**
11. **Click View Roster to ensure that the people you intended to select were actually added to the roster. Manually added Attendees are highlighted in blue.**


Attendance Roster

Total Attendees: **10** - Attendees to show on each page: 75

| Name | Status | Dept./Div. | Primary Rotation | •/? |
|---|---|---|---|---|
| **Archer, David A** | PRG 1 | FM-Family Medicine | FM:Geri-PCMH | ? |
| **Wise, Craig** | PRG 1 | FM-Family Medicine | | ? |
| **Wolf, Becky** | PRG 1 | FM-Family Medicine | FM:ComMed-SC | ? |
| **Aktar, Aboud** | PRG 2 | FM-Family Medicine | FM:Derm-SC | ? |
| **Julka, Vijay** | PRG 2 | FM-Family Medicine | FM:MedA-SC | • |
| **O'Doull, Kathleen** | PRG 2 | FM-Family Medicine | FM:Card-SC | ? |
| **Parke, Brenda** | PRG 2 | FM-Family Medicine | FM:Derm-SC | • |
| **Baker, Thomas Eugene** | PRG 3 | FM-Family Medicine | FM:AmbGyn-SC | ? |
| **Gomez, Maria** | PRG 3 | FM-Family Medicine | FM:MedC-SC | ? |
| **Wallace, Charles** | PRG 3 | FM-Family Medicine | FM:MedB-SC | ? |

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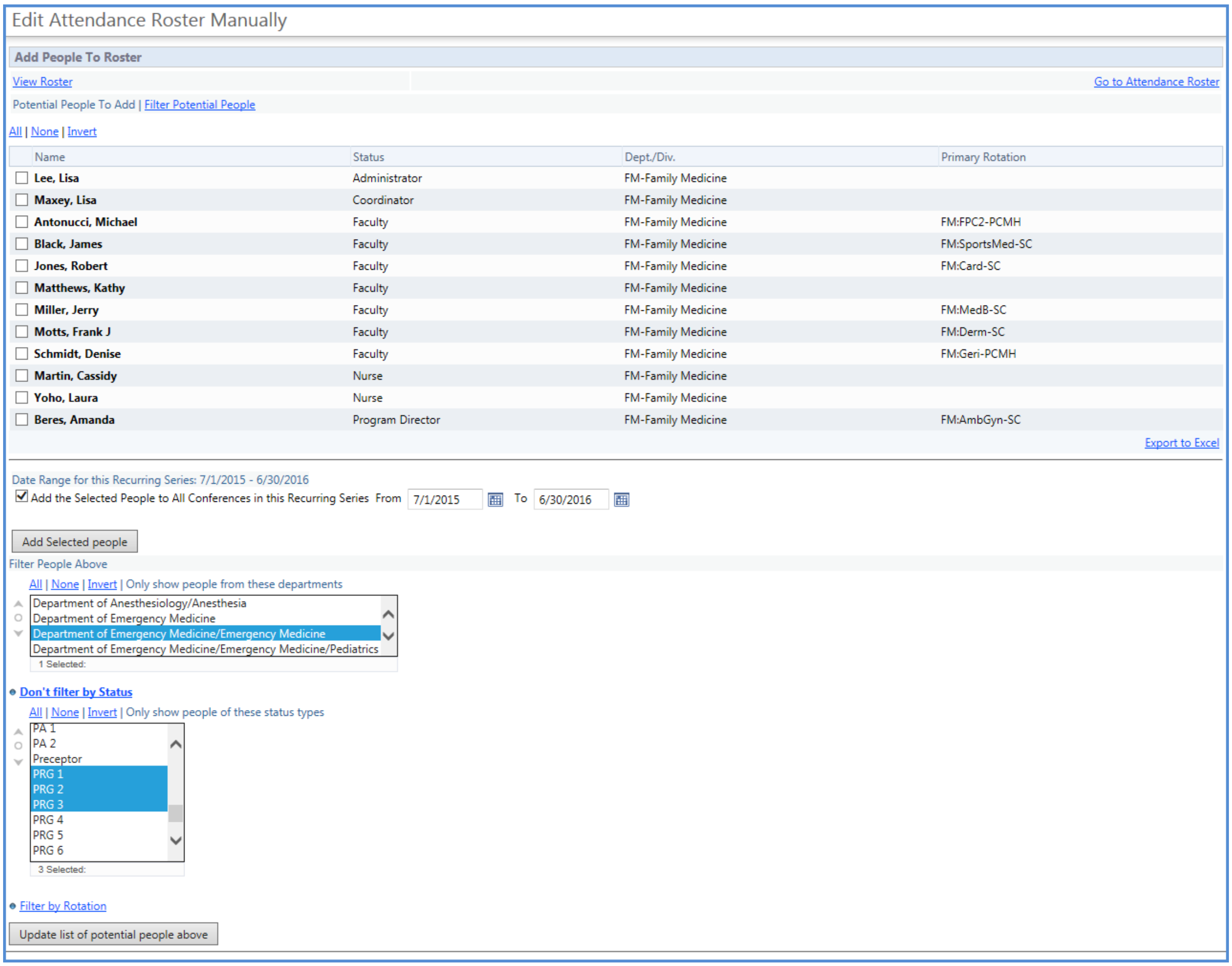
**From Another Department/Division**

1. **Go to Conferences > Manage Conferences**
2. **Optional: Enter dates and click Update to restrict the Conferences listed to just those that occur within a specific date range**
3. **Click on the appropriate conference**

4. Click the Attendance icon in the top banner
5. Click Add People
6. Towards the bottom of the page, select a department/division
7. Optional: Use the Filter by Status or Filter by Rotation links to filter the list of people shown
8. Click Update list of potential people above
9. Check the names of people to add them to the roster
10. Optional: Check the box to 'Add the Selected People to All Conferences in this Recurring Series from 'Date' to 'Date''
11. Click Add Selected People
12. Click OK
13. Click View Roster to ensure that the people you intended to select were actually added to the roster. Manually added Attendees are highlighted in blue.




## Remove Person

1. Go to Conferences > Manage Conferences
2. Optional: Enter dates and click Update to list conferences that occur within a specific date range
3. Click on the appropriate conference
4. Click the Attendance icon in the top banner

5. Click Remove People
6. Select the person or people you want to remove from the roster
7. Click Remove Selected People
8. Click OK

**Note: Circumstance when a person cannot be removed from roster:**

- Attendance has been taken and the person has been marked present,
- Conference module has been configured to add hours to attendee's Duty Hours after they were marked present,
- The person has already approved the conference logs in the Duty Hours module

# Reporting on Conference Attendance

## 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 the 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.

## 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 | ● | | |

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**Totals:**

| 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%** |

Export to Excel

| 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%** |

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| 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%** |

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**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 the 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 |

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**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 Category | Sub Content | CH | OCH |
|---|---|---|---|---|---|---|
| Grand Rounds | 9/3/2012 12:00:00 AM | GR2 | Rounds | | 2 | 0 |
| Journal Club - Medical Knowledge | 9/4/2012 12:00:00 AM | JC1 | Journal Club | | 1 | 0 |
| Grand Rounds | 9/10/2012 12:00:00 AM | GR2 | Rounds | | 2 | 0 |
| Grand Rounds | 9/17/2012 12:00:00 AM | GR2 | Rounds | | 2 | 0 |
| Grand Rounds | 9/24/2012 12:00:00 AM | GR2 | Rounds | | 2 | 0 |
| Grand Rounds | 10/1/2012 12:00:00 AM | GR2 | Rounds | | 2 | 0 |
| Journal Club - Interpersonal Communication | 10/2/2012 12:00:00 AM | | Journal Club | | 0 | 0 |
| Grand Rounds | 10/8/2012 12:00:00 AM | GR2 | Rounds | | 2 | 0 |
| Grand Rounds | 10/15/2012 12:00:00 AM | GR2 | Rounds | | 2 | 0 |
| Grand Rounds | 10/22/2012 12:00:00 AM | | Rounds | | 0 | 0 |

Export to Excel

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

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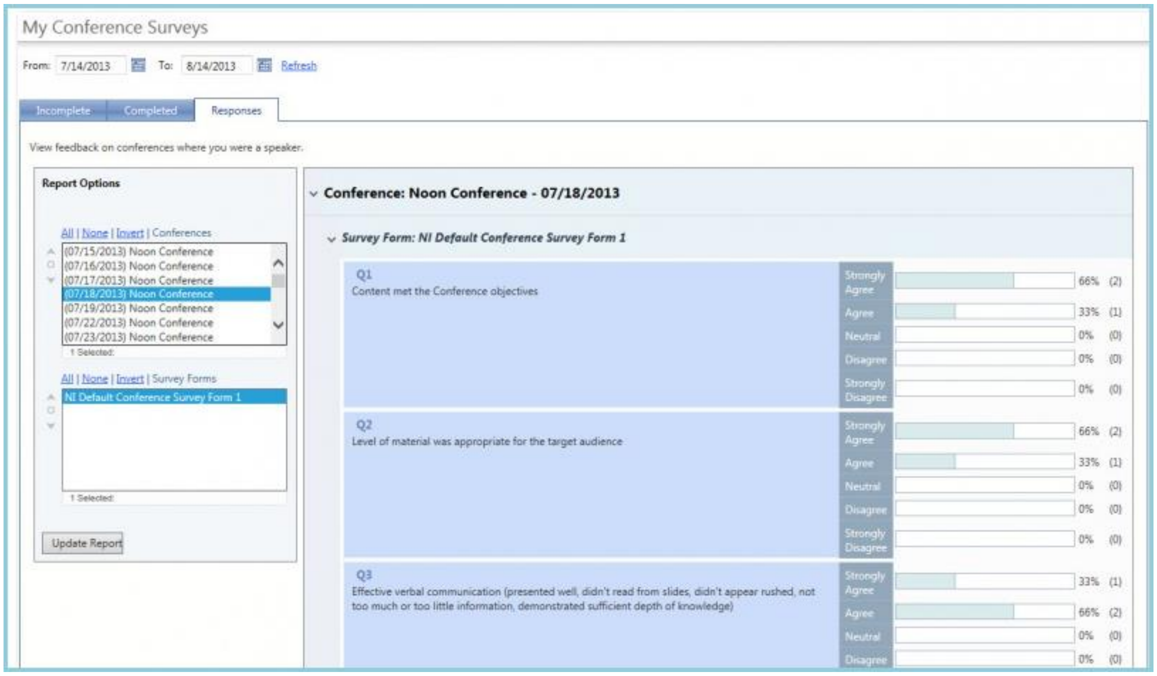
Totals

| 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 |

Export to Excel

## 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 Reports

## View Completed Surveys

**The Manage Conferences page displays an icon in the Surveys column for any conference with a survey attached.**

- **Administrators (Level 4 and 5 users): View completed forms by using the Details link on the Manage Conference Page. Click Details to view the form and attendance data. The link at the bottom right can be used to view all forms.**
- **Residents and Faculty (Level 2 and 3 users): Can view surveys you filled out by going to Conferences > under Surveys: My Surveys. Use the tabs to view surveys assigned to you that are incomplete and surveys you have completed. There is also a tab to view results of surveys completed about you as a speaker.**

## Manage Completed Surveys

**Use the Survey Status List page to manage surveys after distribution. Administrators can go to Conferences > Under Surveys: Survey Status to do the following:**

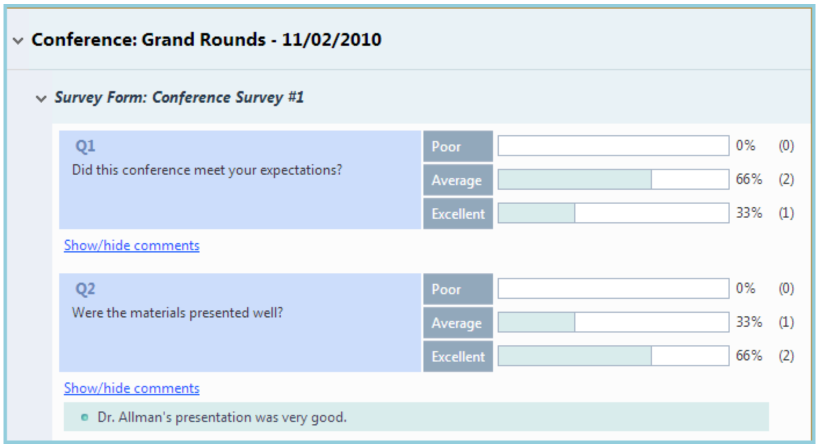
- **Delete survey responses**

- View completed surveys

The columns can be filtered by using the funnel icon.

## 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 Response
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 Response
2. Set the report mode to By Conference
3. Select the conference.
4. Set the date range
5. Click Refresh Lists
6. Select the forms
7. 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**
   a) **Emails can be sent to remind people to complete their conference surveys.**
4. **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.)**
5. **Click Email Selected People**
6. **Edit the subject and body of this email, if needed**
7. **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** | | | |
| Ellenhurst, Lorraine | 1 | 1 | 0% |
| Richardson, Anna | 1 | 1 | 0% |
| **PRG 2** | | | |
| Atwater, Helen | 1 | 0 | 100% |
| Breathett, Kay Lynn | 1 | 1 | 0% |
| Hickman, Homer | 1 | 1 | 0% |
| Kapil, Ranjit | 1 | 1 | 0% |
| **PRG 3** | | | |
| Arko, Seth | 1 | 0 | 100% |
| Legg, Terry | 1 | 1 | 0% |
| 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**

| | | | Conference | Start Date/Time | Category | Attendee | Survey Form |
|---|---|---|---|---|---|---|---|
| | View | Delete | Grand Rounds | 10/22/2012 7:00:00 AM | Rounds | Ashwood, Scott | NI Default Conference Survey Form 1 |
| | View | Delete | Grand Rounds | 10/22/2012 7:00:00 AM | Rounds | Breathett, Kay Lynn | NI Default Conference Survey Form 1 |
| | View | Delete | Grand Rounds | 10/22/2012 7:00:00 AM | Rounds | Legg, Terry | NI Default Conference Survey Form 1 |
| | View | Delete | Journal Club - Interpersonal Communication | 10/2/2012 10:00:00 AM | Journal Club | Ashwood, Scott | NI Default Conference Survey Form 1 |
| | View | Delete | Journal Club - Interpersonal Communication | 10/2/2012 10:00:00 AM | Journal Club | Breathett, Kay Lynn | NI Default Conference Survey Form 1 |
| | View | Delete | Journal Club - Interpersonal Communication | 10/2/2012 10:00:00 AM | Journal Club | Legg, Terry | NI Default Conference Survey Form 1 |
| | View | Delete | Journal Club - Medical Knowledge | 9/4/2012 10:00:00 AM | Journal Club | Alden, Wyatt | NI Default Conference Survey Form 1 |
| | Complete | | Journal Club - Medical Knowledge | 9/4/2012 10:00:00 AM | Journal Club | Allen, Joel | NI Default Conference Survey Form 1 |
| | 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**

**For more information about conference set up go to Help>Tutorial Videos>Conferences-[11.5] Conferences-Reports**