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Overview

In New Innovations, an Advisor mentors a trainee and is given access to information such as procedure logs, evaluation results and conference attendance records. The Advisor is assigned to a resident in the resident’s Personnel profile.

The Advisor is able to do the following for their Advisees:

- View Milestone Reviews - Go to Portfolio > Milestones. Must be on CCC to edit scores.
- View Completed Evaluations - Go to Evaluations > View Completed Evaluations > Advisee Listing
- View Procedure Logger Reports - Go to Logger > Advisor Report
- View Conference Attendance Report - Go to Conferences > Advisor Report

Conference Attendance Report for Advisors

1. Go to Conferences > Advisor Report
2. Select a date range
3. Select advisee(s)
4. Click View Report

![Advisor’s Attendance Report](image)
Evaluations Reports for Advisors

1. Go to *Evaluations > Reports*
2. Click the Advisee tab

Notes:

- On anonymous evaluations, Administrators must give permission for Advisors to see the evaluation results.
Individual Advisee Reports

Click on a resident’s name to view the details. Select each tab to view the evaluation data gathered on the resident. Comments are displayed by default. Results are from the current academic year.

**Baker, Thomas Eugene**
Evaluated 4 times
Has completed 0 evaluations
Rotation Data...

**Form: Faculty Evaluation of Resident**

**PC-1 Cares for acutely ill or injured patients in urgent and emergent situations and in all settings**
Grade Scale
Has not achieved Level 1 - Level 5

Michael Antonucci
3/24/2015 1:20:39 PM
Competent for this skill level

**PC-2 Cares for patients with chronic conditions**
Overall Report

The Overall Report shows the results from every question on every evaluation form that was used to evaluate the resident/fellow. The End Date of the match must fall within the date range of the report to be included. Comments are displayed by default.

1. Go to Evaluations > Reports
2. Select a Resident
3. Click the Overall tab

The first column on the Overall Report includes:

- Form - Name of the evaluation form
- Question - Shows the actual question text
- Grade Scale used
- Comments - Displays any comments made by the evaluator for this question

Results from Various Grade Scales

The remainder of the columns on this page will display different information depending on the grade scales used. We’ll explore the results of each type of grade scale below. Check the box for ‘Scoring Details’ to view a graphic display of the results.
## Tags Reports

### Professional Behavior

Works well with patients and families of different socio-economic backgrounds, religions, sexual preferences and cultures.

<table>
<thead>
<tr>
<th>Grade Scale</th>
<th>Average</th>
<th>Peer Average</th>
<th>Minimum</th>
<th>Maximum</th>
<th>Standard Deviation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Poor - Excellent</td>
<td>5</td>
<td>4.2</td>
<td>5</td>
<td>5</td>
<td>0.33</td>
</tr>
</tbody>
</table>

**David Bradshaw** 1/7/2016 2:40:46 PM

Resident was very sensitive an caring with a NOFL sim family.

**Teresa Spino** 1/8/2016 2:42:48 PM

Not afraid to be an advocate for the patient!

Select the attributes of this resident when working within an interprofessional team.

<table>
<thead>
<tr>
<th>Grade Scale</th>
<th>Most Popular response</th>
<th>PLL Selected</th>
</tr>
</thead>
<tbody>
<tr>
<td>Listens to all opinions - Attends team meetings on a regular basis</td>
<td>Attends team meetings on a regular basis</td>
<td>100%</td>
</tr>
</tbody>
</table>

**Teresa Spino** 1/8/2016 2:42:48 PM

Resident is a good role model for professional behavior.

<table>
<thead>
<tr>
<th>Grade Scale</th>
<th>Average</th>
<th>Peer Average</th>
<th>Minimum</th>
<th>Maximum</th>
<th>Standard Deviation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Poor - Excellent</td>
<td>4.67</td>
<td>4.2</td>
<td>4</td>
<td>5</td>
<td>0.33</td>
</tr>
</tbody>
</table>

### Overall

Select the resident's best skill. Select only one.

<table>
<thead>
<tr>
<th>Grade Scale</th>
<th>Most Popular response</th>
<th>PLL Selected</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professionalism - Leadership</td>
<td>Medical Knowledge</td>
<td>42.6%</td>
</tr>
</tbody>
</table>

**Teresa Spino** 1/8/2016 2:42:15 PM

Very good at finding solutions to equipment problems.

### Is the resident progressing as expected?

<table>
<thead>
<tr>
<th>Grade Scale</th>
<th>Average</th>
<th>Peer Average</th>
<th>Minimum</th>
<th>Maximum</th>
<th>Standard Deviation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes/No</td>
<td>1</td>
<td>0.8</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>

**2nd Year in Residency**

### Patient Caring

Takes vital signs of patient.

<table>
<thead>
<tr>
<th>Grade Scale</th>
<th>Average</th>
<th>Peer Average</th>
<th>Minimum</th>
<th>Maximum</th>
<th>Standard Deviation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Poor - Excellent</td>
<td>5</td>
<td>4.4</td>
<td>5</td>
<td>5</td>
<td>0.33</td>
</tr>
</tbody>
</table>

**David Bradshaw** 1/7/2016 2:40:46 PM

Very thorough process.

**Clinical Practitioner**

Takes vital signs of patient.
### Comments Reports

**Brooks, Maggie**
- Evaluated 51 times
- Has completed 15 evaluations
- Rotation Data

<table>
<thead>
<tr>
<th>Overall</th>
<th>Tags</th>
<th>Comments</th>
<th>Subcompetency</th>
<th>Milestones</th>
<th>Competency</th>
<th>Problems</th>
<th>Compliance</th>
<th>Exportable Data</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Anonymous**

**Overall comments:**
- Excellent resident!

**Question comments:**
- Conduct a 'Well Baby visit.
  - 10/0/15 4:51:09 AM JGB, Ambulatory
  - Excellent with patient and family.

**Benson, Wayne**

**Question comments:**
- Conduct a 'Well Baby visit.
  - 11/0/15 6:51:09 AM JGB, Ambulatory
  - Conducts a thorough Well Baby visit. Excellent with child and mother.

- Clinical knowledge (MK1)
  - 10/10/14 4:51:09 AM JGB, Cardiology
  - Excellent knowledge of diseases and symptoms.

**Midgett, David**

**Question comments:**
- Appropriately manages situations requiring urgent or emergent care
  - 11/0/14 6:51:09 AM JGB, EM
  - Works well in stressful ER situations.

- Has professional and respectful interactions with patients, caregivers, and members of the interprofessional team (e.g., peers, consultants, nursing, ancillary professionals, and support personnel)
  - 11/0/14 1:04 PM JGB, Ambulatory
  - Excellent resident!

**Overall comments:**
- 11/0/14 6:51:09 AM JGB, EM
- Outstanding resident!
Sub-competency Report

The Sub-Competency Report displays the results of evaluations completed about the residents where the forms contained the following:

- Actual ACGME sub-competencies inserted on the form, either manually or rotation-based
- Responses from questions tagged or mapped to sub-competencies, such as EPAs, custom sub-competencies and custom questions (in your own words)

Milestones Report

The Milestones Report displays the results of milestone questions. These may be from daily Shift Cards or from any milestone narratives placed directly on your regular evaluations.
Competency Report

The Competency Report displays data collected about the resident from General questions (Standard questions in your own words) that have been tagged to Core Competencies.

Problems Report

- Resident receives a low score on a specific question on an evaluation form flagged to give Low Score notifications.
- Resident receives a low score on a specific grade scale, on any form, flagged to give Low Score notifications.
Compliance Report

This report displays information about the compliance rate of the resident for completing evaluations assigned to them. Evaluations are included if:

- The End Date of the match falls within the date range of the report
- The Due Date is in the past
Exportable Data

This report displays the actual scores given to each resident by each evaluator. If sub-competencies were dynamically added to the evaluation based on the rotation, these scores will also be shown. If the resident was evaluated 12 times, the scores from all twelve evaluations will be displayed. No calculations are performed on this page. The results on this tab cannot be printed using the ‘View PDF’ button. However, the results can be exported to a spreadsheet format by clicking the Excel button, and then printing the document.
Viewing Completed Evaluations

Residents and faculty are limited to only viewing evaluations completed about them and evaluations they have completed. If no evaluations appear, your program may have restricted resident and/or faculty access. Please check with your coordinator for further assistance.

1. Go to *Evaluations > Completed Evaluations*
2. Select the date range
3. Check the box in front an evaluation
4. Click *View selected evaluations*

### View My Completed Evaluations

- **Filter by Year**: 2015 - 2016
- **Include Archived Items**: 
- **Residency Evaluations**
- **View selected evaluations**: 

<table>
<thead>
<tr>
<th>Evaluator Name</th>
<th>Rotation/Subject Name</th>
<th>Rotation</th>
<th>Session Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Braddock, David Brooks, Maggie</td>
<td>JGB: MICU (JGB Department of Medicine/JGB Med - Internal Medicine)</td>
<td>Faculty Evaluation</td>
<td></td>
</tr>
<tr>
<td>Spino, Teresa Brooks, Maggie</td>
<td>JGB: Pediatrics (JGB Department of Medicine/JGB Med - Internal Medicine)</td>
<td>Faculty Evaluation</td>
<td></td>
</tr>
<tr>
<td>Braddock, David Brooks, Maggie</td>
<td>JGB: EM (JGB Department of Medicine/JGB Med - Internal Medicine)</td>
<td>Faculty Evaluation</td>
<td></td>
</tr>
<tr>
<td>Benson, Wayne Brooks, Maggie</td>
<td>JGB: Ambulatory (JGB Department of Medicine/JGB Med - Internal Medicine)</td>
<td>Faculty Evaluation</td>
<td></td>
</tr>
<tr>
<td>Benson, Wayne Brooks, Maggie</td>
<td>JGB: Cardiology (JGB Department of Medicine/JGB Med - Internal Medicine)</td>
<td>Faculty Evaluation</td>
<td></td>
</tr>
<tr>
<td>Braddock, David Brooks, Maggie</td>
<td>JGB: Geriatrics (JGB Department of Medicine/JGB Med - Internal Medicine)</td>
<td>Faculty Evaluation</td>
<td></td>
</tr>
<tr>
<td>Benson, Wayne Brooks, Maggie</td>
<td>JGB: Consults (JGB Department of Medicine/JGB Med - Internal Medicine)</td>
<td>Faculty Evaluation</td>
<td></td>
</tr>
<tr>
<td>Benson, Wayne Brooks, Maggie</td>
<td>JGB: Ambulatory (JGB Department of Medicine/JGB Med - Internal Medicine)</td>
<td>Faculty Evaluation</td>
<td></td>
</tr>
<tr>
<td>Braddock, David Brooks, Maggie</td>
<td>JGB: Geriatrics (JGB Department of Medicine/JGB Med - Internal Medicine)</td>
<td>Faculty Evaluation</td>
<td></td>
</tr>
<tr>
<td>Spino, Teresa Brooks, Maggie</td>
<td>JGB: Pediatrics (JGB Department of Medicine/JGB Med - Internal Medicine)</td>
<td>Faculty Evaluation</td>
<td></td>
</tr>
<tr>
<td>Brooks, Maggie</td>
<td>JGB: MICU</td>
<td>Resident Evaluation</td>
<td></td>
</tr>
<tr>
<td>Brooks, Maggie</td>
<td>JGB: Pediatrics</td>
<td>Resident Evaluation</td>
<td></td>
</tr>
<tr>
<td>Brooks, Maggie</td>
<td>JGB: EM</td>
<td>Resident Evaluation</td>
<td></td>
</tr>
</tbody>
</table>
Procedure Logger Advisor Report

The Advisor Report allows faculty members designated as Advisors to view the procedures of their advisees.

Go to Logger > Reports > Advisor Report

- Select the resident(s)
- Select the procedure(s)
- Show All Dates or Specify Dates
- Click View report

![Advisor Report Table]

<table>
<thead>
<tr>
<th>Procedure Name</th>
<th>CPT® Code</th>
<th>Independent Target</th>
<th>Total Logged</th>
<th>% of Total Logged</th>
<th>Confirmed (Passed)</th>
<th>Confirmed (Not Passed)</th>
<th>% for Independent (Confirmed/Passed)</th>
<th>Total Refused</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arterial Blood Gas (Emergency Medicine)</td>
<td>10</td>
<td>20</td>
<td>20</td>
<td>100%</td>
<td>19</td>
<td>0</td>
<td>100%</td>
<td>0</td>
</tr>
<tr>
<td>Arterial Line Placement (Emergency Medicine)</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>100%</td>
<td>5</td>
<td>0</td>
<td>100%</td>
<td>0</td>
</tr>
<tr>
<td>Arthrocentesis of the knee (Emergency Medicine)</td>
<td>3</td>
<td>6</td>
<td>6</td>
<td>100%</td>
<td>6</td>
<td>0</td>
<td>100%</td>
<td>0</td>
</tr>
<tr>
<td>Aspiration (Emergency Medicine)</td>
<td>1</td>
<td>5</td>
<td>5</td>
<td>100%</td>
<td>4</td>
<td>0</td>
<td>100%</td>
<td>0</td>
</tr>
<tr>
<td>Blood Gas (Emergency Medicine)</td>
<td>12345</td>
<td>5</td>
<td>4</td>
<td>80%</td>
<td>4</td>
<td>0</td>
<td>80%</td>
<td>0</td>
</tr>
<tr>
<td>Bone marrow aspirate/biopsy (Emergency Medicine)</td>
<td>5</td>
<td>6</td>
<td>6</td>
<td>100%</td>
<td>5</td>
<td>0</td>
<td>100%</td>
<td>0</td>
</tr>
</tbody>
</table>
**Portfolio**

**How to access CCC Portfolio Reviews:**

1. Access the Reviews by following one of these paths:
   a. Click the auto-login link in your email notification
   b. In the Notifications panel on your Home Page, under Portfolio, click ‘Sign ___ reviews you participated in.’
   c. Go to Portfolio > People to Review

2. Select the subject from:
   a. The calendar or
   b. The Upcoming Reviews panel.

3. In the Review Details panel to the right, click **Go to Review Form**.
4. Review the data shown for each widget for the review period.
5. Complete the Progress Summary by:
   a. Clicking the appropriate radio buttons
   b. Adding comments
   c. Signing the form, if this option was included.
6. To close the form, click Exit Form.
Milestones

1. Go to Portfolio > Milestones

2. Click on a resident's name

3. Score each sub-competency
4. Click View Details to see the evaluation results mapped to the sub-competencies

Complete a Milestone Review

Click on a resident to view the details of their Milestone Review on a more granular level. There are four tabs to help you dig deeper into each resident's Milestone Review: Milestones, Resident Review, Attachments and Meeting Notes.

Milestones Tab

On the Milestones tab, each sub-competency is displayed allowing the CCC to view and score the resident's level of competency. Scroll down the list to rate the resident on each sub-competency.

- Score - Select one of the radio buttons at the bottom of the template box. Continue to scroll down the page to view and score each sub-competency. Selections are automatically saved. To deselect a score, click the radio button again.
- Flag - Click the Flag icon on a specific milestone to show that milestone narrative is an area of concern and 'Requires Attention.' The milestone will be highlighted in yellow. Click it again to remove the flag.
To the right of each sub-competency, a panel displays a summary of the resident's evaluation results that have been mapped to this sub-competency.

On the panel you'll find:

- **Line Graph** - The graph displays the results of evaluations completed on the resident over the last 6 months that have been linked to this sub-competency. In our example shown below for PC1:
  - **Dark Blue Line** – Shows her average score each month from evaluations.
  - **Light Blue Line** – Shows the average evaluation score of her peer group, those in their first Year in Training.
  - Hover over the graph to see the number of responses received and the average for that month.

- **Row of Scores**:
  - **AVG** - Shows the resident's overall average on evaluations for this six-month period for questions linked to PC1. See the section below on Normalized Averages.
• PEER - Displays the overall peer average on evaluation results linked to PC1 for all residents in their first Year of Training for this six-month period.
• PRIOR - Shows the score that this resident received on her prior Milestone Review for PC1.

No Data
Occasionally the panel to the right will not display any information. For the resident's average and the peer average to appear there must be at least one evaluation completed and the results mapped to this sub-competency. There must be at least two evaluation results in different months, plus appropriate mapping, to create the line graph.

View Details
To view more information about evaluation results mapped to this sub-competency, click the View Details button.

Notes – CCC Tab
• Click New Note to add a note about this subcompetency. Click Save.
• Notes from previous Milestone Reviews will be displayed
• Residents DO NOT see these notes
Notes – Resident Tab

- Click **New Note** to add a message to the resident about this sub-competency. Click **Save**.
- Notes to the Resident from previous Milestone Reviews will be displayed.
- Residents DO see these notes. (The Milestone Review must be marked as 'Complete' for these notes to appear to the resident.)

Bar Graph

- Within a milestone narrative panel, a small bar graph icon designates that there are evaluation results from Milestone narratives placed directly on your questionnaire or through the use of Shift Cards.
- See more details below under 'Results from Milestone Questions'.

Navigation

- Click **View Summary** to exit the Details page and return to the list of sub-competencies.
- View Previous or Next to move to other sub-competencies and keep the details open.
Other – The ‘Double-Arrow’ icon collapses the left panel giving you a broader view of the Milestone data.