New Innovations (RMS) Logger Module

MMCGME

Metro MN Council on Graduate Medical Education

2024

Table of Contents

Intro to Procedure Logger

For more information about procedure logger go to help > tutorial videos > [10.1] Procedure Logger-Overview

Procedure Logger is designed to help track information about procedures performed by learners in your program.

You can:
Create a list of procedures for learners to choose from
Set target numbers for each procedure
Create logger forms to capture pertinent information, including the supervisor's name, patient information, the procedure performed, diagnoses given and comments

Privileging

The Procedure Logger module offers both manual and automatic privileging. After setting goals for each level of supervision, the system will keep track of your residents' progress towards those target numbers.

Levels of Supervision

The ACGME defines three levels of supervision for learners performing procedures.
You decide how many procedures to require before the learner reaches "conditional independence."

Finding Personnel with the Right Procedure Privileges

New Innovations provides a link to a report about the procedures trainees are privileged to perform. The link can be added to the NI Home Page so that it can be accessed by nursing staff at any time. Adding the link meets JCAHO standards for nursing access to privileged residents.

Who Can Do What in Logger

The following privilege levels have access to the Procedure Logger module:

- Level 6 - Setup and maintain the Procedure Logger module; View, add, edit, confirm and delete procedures; Generate reports; View list of privileges by physician and by procedure
- Level 5 - Setup and maintain the Procedure Logger module; View, add, edit, confirm and delete procedures; Generate reports; View list of privileges by physician and by procedure
- Level 4 - View all procedure logs; View all procedure reports; View list of privileges by physician and by procedure
- Level 3 - Supervise and confirm procedures; View list of privileges by physician and by procedure
- Level 2 - Add, edit and view own procedures; Delete own unconfirmed procedures; Generate own procedure report; View list of privileges by physician and by procedure
- Level 1 - View list of privileges by physician and by procedure

***<u>Note</u>**: each level has its own functionality and you can use privilege levels in conjunction with each other. For example, you might give your chief resident Levels 2, 3 and 4. Level 2 allows the chief to log procedures, level 3 allows him or her to be in the supervisor dropdown list and level 4 lets him or her view all procedures for the residents in the program.

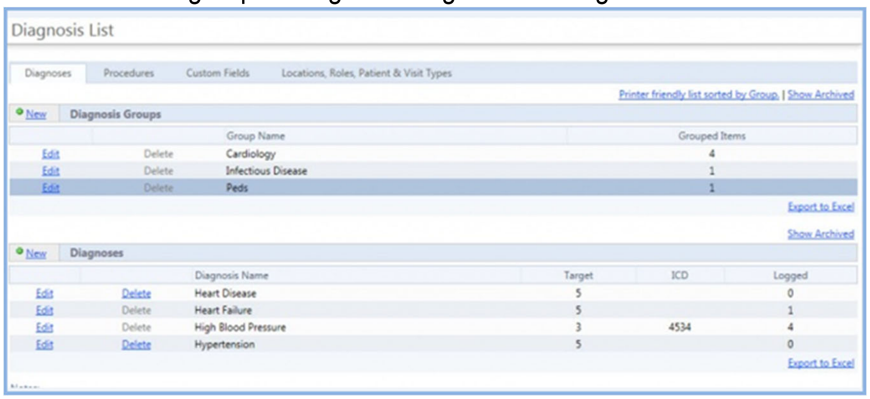
Glossary

ACGME Import - If residents log their cases into the ACGME website, the procedures can be imported into the Procedure Logger module using our ACGME Import tool.
Automatic Privileging System -Trainees can be automatically granted a credential when a target number of procedures have been successfully performed and confirmed.
CPT Codes - Current Procedural Terminology (CPT®) was developed by the American Medical Association in 1966. Each year, an annual publication is prepared that makes changes corresponding with significant updates in medical technology and practice. [AMA definition]
Levels of Supervision -The level of supervision a trainee needs to perform a procedure.
Offsets - Offsets are the numbers of procedures a trainee performed before they used New Innovations. Residents can be given credit for these procedures in the system.
Procedure - Any medical procedure that a trainee performs as required by their training institution or program.
Procedure Group - A name under which related procedures are grouped. Used to organize, sort, and filter procedures.
Procedure Log - A form electronically completed and submitted each time a trainee performs a procedure.
Role -The role describes the action the resident took in the procedure. Typical roles include Observed, Assisted and Performed.
Supervisor - A person who oversees a trainee during a medical procedure. The supervisor typically approves and confirms the procedure logs. If you are using the automatic credentialing feature, supervisors must approve and confirm procedures before credit is given to the resident towards their credentialing goal.

Creating the Diagnosis List

For more information about procedure logger go to help > tutorial videos > [10.2] Procedure Logger-Lists

Create a diagnosis list for your trainees to use when logging procedures.
You can create groups to organize large lists of diagnoses to make it easier for your residents and fellows.

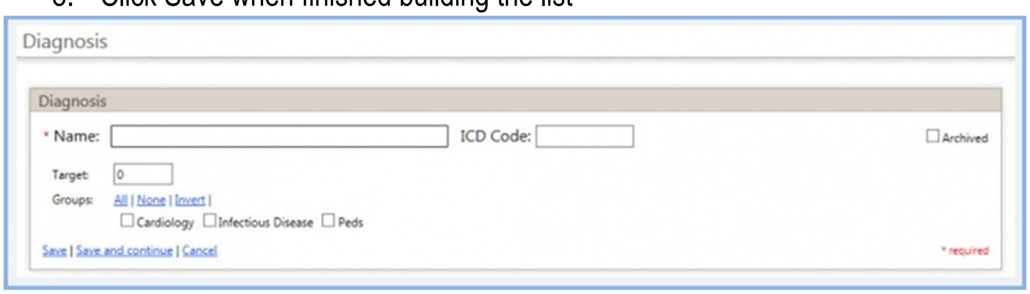


Create a Diagnosis Group

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

Create a Diagnosis

1. Go to Logger > Setup column: Lists & Fields > Diagnosis tab
2. Click **New** in Diagnoses
3. Enter the Diagnosis Name
4. Enter the ICD Code (optional)
5. Target - Enter the number of diagnoses you want logged and confirmed
6. Groups - Check the box for the appropriate group
7. Click Save and Continue to continue adding diagnoses to the list
8. Click Save when finished building the list



Adding Procedures & Setting Procedure Targets

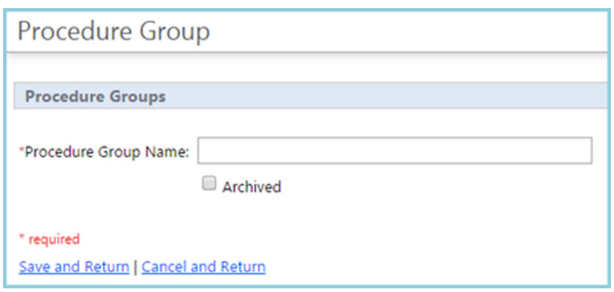
For more information about procedure logger go to help > tutorial videos > [10.2] Procedure Logger-Lists

You create the list of procedures that populates the dropdown used by trainees when logging their procedures.
If you gave your Program Director (PD) the ability to grant privileges, then only your PD can add, edit or delete procedures.

Create procedure groups

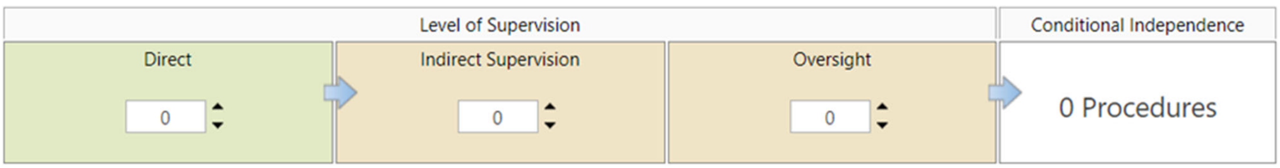
You can organize procedures into groups. This can make it easier for learners to find their procedure in the dropdown while logging.

1. Go to **Logger** > Setup column: **Lists & Fields**
2. Click **New** in Procedure Groups
3. Enter the Procedure Group Name
4. Click Save and Return
5. Create or edit a procedure (see below) and add it to this procedure group



Create procedure

1. Add a new procedure
   a. Go to **Logger** > Setup column: **Lists & Fields**
   b. Click **New** in the Procedure section
   c. Enter the procedure Name
   d. Optionally, enter the CPT Code. There's no built-in spot for adding a diagnosis code
2. Set procedure targets
   a. Enter the number of procedures you want a learner to have logged before they begin displaying a new level of supervision:



   Direct - A supervising physician must be physically present with the resident and patient
   Indirect Supervision - A supervising physician must be immediately available to provide direct supervision
   Oversight - A supervising physician must provide feedback after a procedure is performed

   b. Set Oversight to more than "0" if you're using automatic privileging

Learners can't advance automatically unless you put a "1" or more in Oversight. If you add an Oversight number *after* a learner has already logged enough procedures, that learner still won't appear as a supervisor. You can ask them to log another procedure. When they do, they should be recognized as a supervisor.

   c. Note the sum in **Conditional Independence**
   After completing the specified number of procedures, a learner reaches this final stage. At this point, the learner *may* be considered able to perform procedures without supervision. You can edit this label for your institution if you want it to better reflect the status you'd like this stage to represent. If you want this stage to allow the learner to supervise procedures, be sure to allow it in Logger configuration
   d. Check **Residents cannot supervise** if you want to prevent learners from supervising this procedure even if they have achieved "conditional independence"
      - This block is not absolute. Giving a learner a level 3 in procedures (through their Personnel record) can still allow that learner to supervise this and other procedures.
3. Set reporting, group, save
   a. Check **Omit from Privilege Report** if you don't want this procedure to appear on the Privilege Report
   b. Check any existing **Groups** to include this procedure in that group
   Groups organize how procedures appear to learners as they pick from the dropdown
   c. Click **Save** if you're done, or **Save and continue** to add another procedure

Copy procedure list to another department

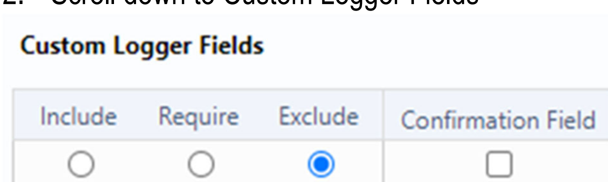
Admins with Level 5 or 6 Logger privileges in both departments (the department with the existing procedures and the department where you want them copied) can contact New Innovations and request the list be copied.

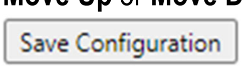
Creating Custom or Confirmation Logger Fields

You can create custom fields to capture data that is specific to your program. This is a two part process: 1. Create custom field 2. Add custom field to form

1. Create custom fields
    1. Go to Logger > Setup column: Lists & Fields > Custom Fields tab
    2. Click **New**
    3. Enter the name of the field
    4. Select the Field Type:
        - Check box – Check box is provided
        - Check Box List – User may select more than one check box
        - Date Box – Calendar is provided
        - Drop-down List – User may select one item from a dropdown list
        - Multi-select Box – User may select more than one item from the list
        - Radio Buttons – User may select only one option
        - Text Box – User enters text
    5. Click **Save**
    6. If you selected the Check Box List, Drop-down List, Multi-select Boxes or Radio Buttons, here's how to build the list of items: 1. Enter the first item in the list in the text box. Click Add New Item. Continue until all items have been entered. Move them up and down on the list in the order they should appear. Use the Edit and Delete links to change or delete an item 2. Add Custom Fields to Forms. Go to **Logger** > under Setup: **Configuration**

2. Add custom fields to Logger form
    1. Go to **Logger** > Setup column: **Procedure Logger** > **Fields** tab
    2. Scroll down to Custom Logger Fields



    3. Select one:
        - Click **Include** to place the custom field on your form
        - Click **Require** to place the custom field on your form and make it mandatory before the user can save their Log Book.
        - Click **Exclude** to remove a custom field from your form
    4. Click **Move Up** or **Move Down** to put your custom fields in a specific order
    5. Click 

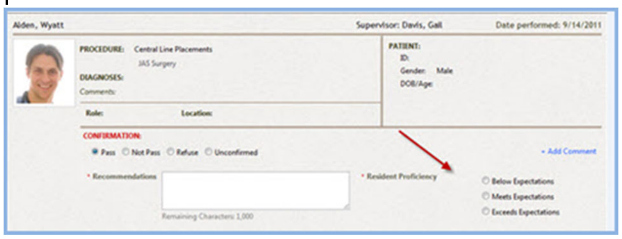
Use custom fields as Confirmation fields

You can use custom Logger fields as Confirmation Fields for prompting a supervisor's feedback (like recording a grade or comment) when confirming a procedure.

Who sees confirmation fields?

- The person who logs the procedure does not see the confirmation field
- The supervisor sees it once the supervisor selects Pass or Not Pass

Example of a confirmation field provided to the faculty member to grade the resident's proficiency in a procedure:



1. Create Confirmation field:
    1. Go to **Logger** > Setup column: **Lists & Fields** > **Custom Fields**
    2. Click **New**
    3. Enter the name (Evaluation or Supervisor Feedback, for example)
    4. Choose the **Radio Button** Field Type
    5. **Save**
    6. Add the first radio button label (item)
    7. Click Add new item
    8. Continue to add as many radio buttons as you will give the supervisor to grade
    9. Radio buttons can be sorted alphabetically or you can use the Move Up/Down links to reorder the labels
    10. **Save**
2. Add as Confirmation field:
    1. Go to **Logger** > Setup column: **Procedure Logger** > **Fields** tab
    2. Scroll down to Custom Logger Fields
    3. Check the box for **Confirmation Field**

Creating & Editing Logger Locations

If you want the **location** where a learner saw a patient to be part of each log, follow these steps to populate the locations dropdown list.

1. Go to **Logger** > Setup column: **Lists & Fields**
2. Click the **Locations, Roles, Patient and Visit Types** tab
3. In the Locations area, click **New**
4. Enter the name of the location
5. Enter the order that this location should appear in the list (optional)
6. Click **Save and Return**
7. Locations can also be archived by checking the Archived box when editing locations

New | Locations

		Location Name	Order	Logged	Archived	Last Updated By
Edit	Delete	Suture Room	0	2		Unknown
Update Cancel	Delete	Treatment Room A	0	0	☐	Unknown

Export to Excel

Creating & Editing Logger Roles

The list of roles created here provides a dropdown list for learners to say what role they performed in a procedure. This is a required field if you are using the automatic privileging option. Only those roles that are designated to count towards privileging add to a resident's count towards performing that procedure independently.

New | Roles

		Role Name	Counts Toward Privileging	In Use
Edit	Delete	1st Assist		✓
Edit	Delete	2nd Assist	✓	✓
Edit	Delete	Observed		
Edit	Delete	Performed	✓	✓

Export to Excel

Create

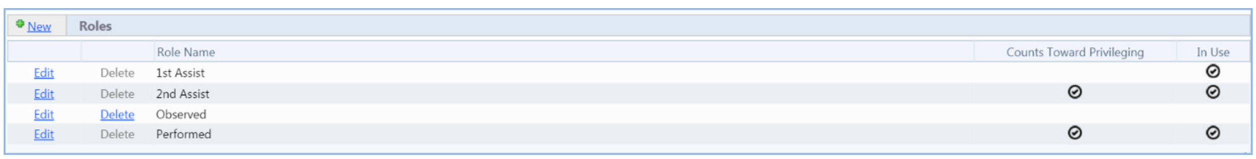
1. Go to **Logger** > Setup column: **Lists & Fields**
2. Click the **Locations, Roles, Patient and Visit Types** tab
3. In the Roles area, click **New**
4. Enter the role name
   For example: Observed, Assisted and Performed are common roles
5. Check the box if This Role Counts Toward Privileging (Note: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

Edit

1. Click **Edit** beside the Role
2. Make changes
3. Click **Update**

Delete

1. Click **Delete** beside the Role
2. Note: Roles that have been used in procedure logs cannot be edited or deleted.



		Role Name	Counts Toward Privileging	In Use
Edit	Delete	1st Assist		✓
Edit	Delete	2nd Assist	✓	✓
Edit	Delete	Observed		
Edit	Delete	Performed	✓	✓

Creating/Archiving Logger Patient Types

For more information about Procedure Logger go to Help > tutorial videos > [10.2] Procedure Logger-Lists

Use Patient Types if you want to track them as a part of logged procedures.

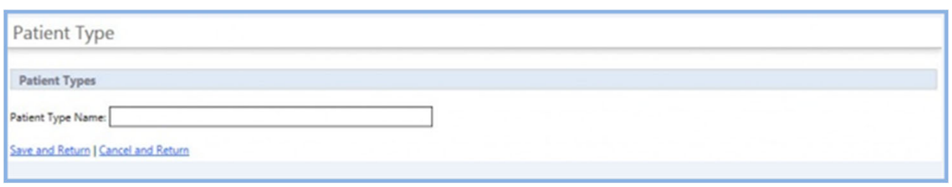
The list of patient types created here provides a dropdown list for residents and fellows to select telling what type of patient they saw.

Example patient types could be:

- Pediatric, Adult and Geriatric
- Inpatient and Outpatient

Create a Patient Type

1. Go to **Logger** > Setup column: **Lists & Fields**
2. Click the **Locations, Roles, Patient and Visit Types** tab
3. In the Patient Types area, click **New**
4. Enter the type of patient
5. Click **Save and Return**
6. Continue entering your Patient Types until all are included in the list



Archive a Patient Type

1. Go to **Logger** > Setup column: **Lists & Fields**
2. Click the **Locations, Roles, Patient and Visit Types** tab
3. In the Patient Types area, click **Edit**
4. Check the box for **Archive**
5. Click **Update**

<u>Notes:</u>

- If an archived item was selected then when you run reports, the archived item will show up as selected.
- Archived items will not be in the drop down list when entering a new log or logs entered for past procedures

Creating/Archiving Logger Visit Types

Visit Types are optional. Create these if you want to capture this type of information from your residents' procedure logs.

The list of Visit Types created here will provide a drop-down list for residents and fellows to select telling what type of visit they had with the patient.

Some examples of patient types may be:

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

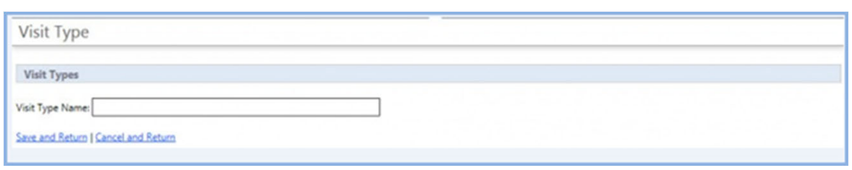
New Visit Types

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

Export to Excel

Creating a Visit Type

1. Go to **Logger** > Setup column: **Lists & Fields**
2. Click the **Locations, Roles, Patient and Visit Types** tab
3. In the Visit Types area, click **New**
4. Enter the name of the type of visit
5. Click **Save and Return**
6. Continue entering Visit Types until all are included in the list.



Archive a Visit Type

1. Go to **Logger** > Setup column: **Lists & Fields**
2. Click the **Locations, Roles, Patient and Visit Types** tab
3. In the Visit Types area, click **Edit**
4. Check the box for Archive
5. Click Update

Note:
1. If an archived item was selected then when you run reports, the archived item will show up as selected.
2. Archived items will not be in the dropdown list when entering a new log or logs entered for past procedures

Configuring Procedure Logger

For more information about procedure logger go to help > tutorial videos > [10.3 Procedure Logger-Configure Module

Configure Procedure Logger to set up:

- Automatic privileging
- Notifications
- Which fields appear on the procedure logger form

Go to **Logger** > Setup column: **Procedure Logger**

General tab

Notifications

- Resident/Supervisor Email Alerts. Enable to automatically send emails to:
  - Supervisors - notifying them they have a procedure to confirm
  - Person who logged procedure - notifying them when procedures have been confirmed and not passed, refused, deleted and when they have reached a privilege in a procedure
- Allow Auto Login - Enable to permit supervisors to use auto-login
- Administrative Email Alerts - Enable to cc administrators on all notifications and when a trainee has reached a privilege target
  - Admin Email Address - Enter the email address of the administrator to receive these emails

Logging

- Age/DOB Tracking - Choose to have either the date of birth or age of the patient recorded in the log
- Logging Time Period - Limit when the trainee can record procedures by selecting from the drop-down list the number of days prior to the current date procedures can be logged
- Diagnosis Entry - Choose either a Drop-down List or Text Box, if diagnoses are to be recorded. Check the box to allow multiple diagnoses to be logged.
- Require supervisor confirmation - Enable or Disable.
  Enabled:
  - Logs are emailed to the supervisor selected in the log. Supervisor can mark it passed.
  - Reports show passed logs and the passing supervisor
  - Passed logs count towards Privileging numbers
  - Logs are counted if using Auto Privileging (if role in procedure is set to count toward privileging)

Disabled: Logs are automatically confirmed

Other options

- Resident Procedure Logging - Enable to have trainees log their own procedures
- Confirm Multiple Procedures - Enable to allow supervisors to confirm all procedures on their Confirm Procedures page with a single click. Up to 50 procedures can be confirmed at one time.
- Procedure Code Label - user medical procedure codes or dental codes (CDT)

Supervisor options

- Allow residents to supervise procedures they are privileged to perform - Enable this option to have trainees automatically appear on the supervisor list for procedures they can perform independently. In addition to choosing Enabled here, you must **also** set the number of procedures required for the learner to supervise other learners.
- Share supervisors with other departments - Enable to have your department/division supervisor's available for use in other departments
- Use supervisors from other departments - Enable to have supervisors from other departments/divisions appear in the supervisor list in your department/division.
  1. Specify a department from the list - Important: Only those departments that have shared their supervisors will appear in the list.
  2. Click **Add**
  3. Click **Save Configuration**

Note:
When sharing supervisors with other departments, the supervisor sees the configuration of the program where the procedure was logged.

- If auto-login is not configured in the department where the procedure was logged, no auto-login link will be provided in the notification email for the supervisor, even if auto-login is configured in his or her home department.

Privileging tab

Privilege Access

L6 Options: Allow Level 5 administrators to modify Privileging options. This is activated by program. When it is set in a program, it is not set for other programs

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

Privileging system and program director options

What is privileging in New Innovations?
The software will keep track of the number of procedures logged and passed. The procedure logs record the procedure name, date logged, the role the resident had in the procedure and the supervisor name. You can also gather any custom data your program requires.

Choose Automatic or Manual:

Automatic - Residents and fellows can be automatically privileged to perform procedures independently once they meet the targets you set for each procedure.

1. Choose the Automatic radio button
2. Exclude specific residents from automatic privileging (optional)
3. You must also:
    - Set logging targets for each procedure—and be sure Oversight is set to at least 1 and not 0
    - Have at least one procedure 'Role' that counts towards privileging goals
      Only procedures logged with these roles can count toward automatic privileging
    - Set these fields to Required (see **Fields** tab below):
        - Procedure Name
        - Supervisor
        - Role

Manual - Grant privileges manually

- Select the Manual radio button (Anyone with level 5 or 6 privileges can grant privileges)
- Manual Settings:
    - Check the box if only the Program Director and Level 6 users should be able to grant privileges. If you give your PD the ability to grant privileges, he or she will be the only one who can add, edit or delete procedures.
    - Select other Status Types to grant privileges (optional)
    - The date a person is privileged may be set to as many as ___ days prior to the current date
    - Apply the privileging options to the following Department/Divisions: Administrators can apply this rule to any departments/divisions where the administrator has access
    - **Final Scope of Authority level should be displayed as**
      Type in whatever your institution wants to label the highest learner privilege level
      Default = Conditional Independence
- Click Save Configuration

Fields tab

Default Log Fields

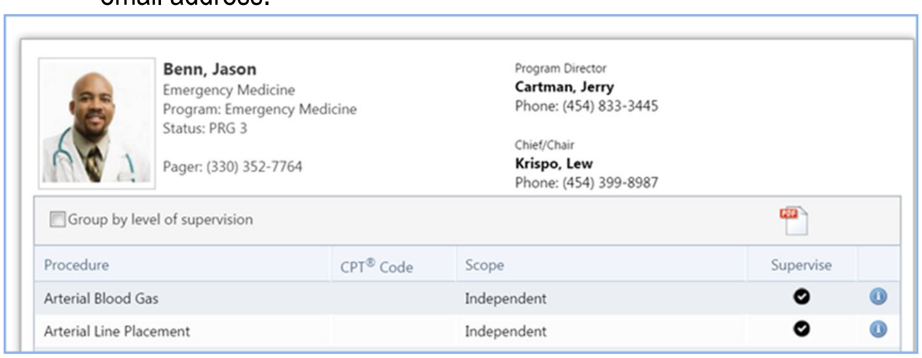
1. Select the fields to appear on the Procedure Logger form. For each field check one of the following options:
    - Include - Displays field on logging form, but is optional
    - Require - Displays field on logging form and must be populated to save the log
    - Exclude - Field will not display on logging form
2. If you're using our Automatic Privileging system, the following fields should be marked as 'Required:'
    - Procedure/CPT
    - Attending/Supervisor
    - Role in Procedure
3. Click **Save Configuration**

Checking Procedure Privileges in Privilege Reports

Nurses, physician assistants or other clinical staff who have a Level 1 privilege in Procedure Logger can check the procedure privileges of residents and fellows. They can search by last name, procedure or CPT Code.

Search by Name

1. Go to **Logger** > **Privilege Reports**
2. Enter "surname, forename" or "forename surname"
3. Click **Search**
4. Click on a person from the results
5. The right panel displays a list of procedures and the Scope of Supervision for that resident and whether they can supervise along with the resident's Program Director and Chief/Chair's name and email address.



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

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

A check in the supervise column indicates:

- The person has L3 Privileges in Procedure Logger
- The person's program has enabled the option in PL configurations that residents can supervise when they have reached the 'Independent' target for a procedure
- The person has been 'Assigned' as a supervisor in Supervisors list under Logger > Setup > Supervisors

Search by Procedure

1. Go to **Logger** > **Privilege Reports**
2. Click Find Procedure
3. Enter a procedure
4. Click Search
5. Results will appear in the left column, grouped by Scope
6. Select a name. The person's record will appear on the right.

Search by CPT Code

1. Go to **Logger** > **Privilege Reports**
2. Enter a CPT Code
3. Click Search
4. Select a name. The person's record will appear on the right.

Search by Department

1. Go to **Logger** > **Privilege Reports**
2. Enter a Department
3. Click Search
4. Select a name. The person's record will appear on the right.

Procedure Logger Reports

For more information about procedure logger go to help > tutorial videos > [10.5] Procedure Logger-Report

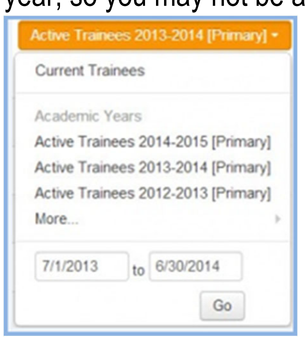
- There are several reports available for advisors, residents, and supervisors that show counts and other details from procedure logs
- There are two additional privilege reports that list residents' scope of authority for performing procedures.
  The privilege reports are often used by the nursing staff on the units when they need to find a physician quickly to perform a procedure.
- You can also design your own reports in the Advanced Reports section

Trainee Summary

This Procedure Logger report displays a complete record of procedures logged in your program for current and past residents. You can view your residents by training year, plus drill down to find the details for each resident and procedure. Residents must have a Training Record in their Personnel file to appear on this report (active or archived)

1. Go to **Logger** > **Resident Reports**
2. Click **Trainee Summary**
   The report displays a list of your current trainees grouped by 'Year in Residency'
3. The Total Logged column includes all procedures logged, not just those in the current program

4. Click Current Trainees to select a different academic year and display the list of trainees that were active during the year selected. Using this feature lets you look at trainees from past years, even if their record is archived. The residents must have a training record to be able to separate procedures by year, so you may not be able to view resident information before training records were instituted.



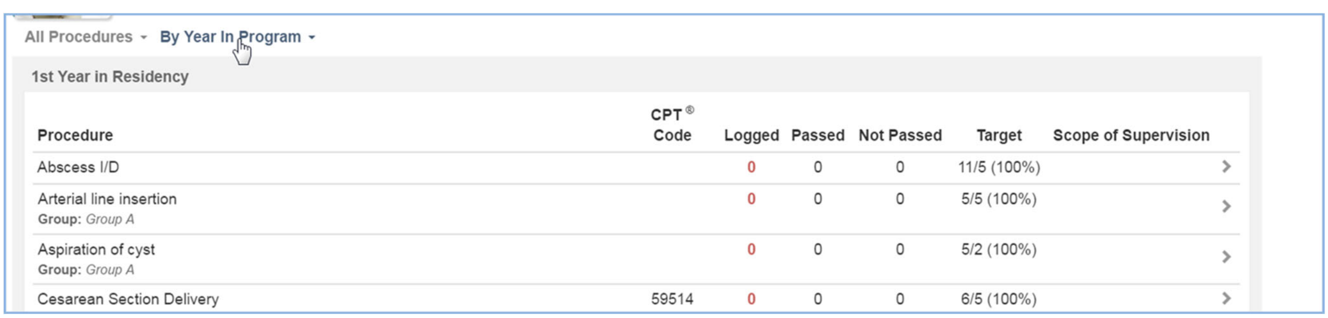
5. Click the name of a trainee to display the details about the procedures logged by that resident. When the resident has met the target for a procedure it is shown in green. 6. Procedures can be displayed by Group. Click By procedure and select By groups to display all logs for each group. Click By Group to select a single group name and only the procedures belonging to that Group will be displayed. Click By procedure again to return to the full list of procedures by that resident.

Thomas Baker
7/1/2013 - 6/30/2016

Procedures logged · By Procedure

Procedure	CPT® Code	Logged	Passed	Not Passed	Target	Scope of Supervision
Abscess I/D		11	11	0	11/5 (100%)	Independent 5/2/2016
Arterial line insertion Group: *Group A*		5	5	0	5/5 (100%)	Independent 5/2/2016
Aspiration of cyst Group: *Group A*		5	5	0	5/2 (100%)	Independent 3/14/2016
Cesarean Section Delivery	59514	6	6	0	6/5 (100%)	Independent 2/19/2016
C-Section * Group: *Group C*		10	10	0	10/10 (100%)	Independent 4/25/2016
Echocardiogram Group: *Group B*		5	5	0	5/5 (100%)	Independent 5/2/2016
Electrocardiogram Group: *Group B*		6	6	0	6/5 (100%)	Independent 3/24/2016
Foreign body removal Group: *Group A*		2	2	0	2/3 (67%)	Independent 4/25/2016
Vaginal Delivery Group: *Group C*		22	22	0	22/5 (100%)	Independent 1/12/2016

6. Click Procedures logged at the top, click on a Year in Residency (or Fellowship) to view the details about the logs entered during that specific time period. When the resident has met the independent target for a procedure it is shown in green. Click Collapse to hide the details. Any filtering will affect the data shown here, as well.



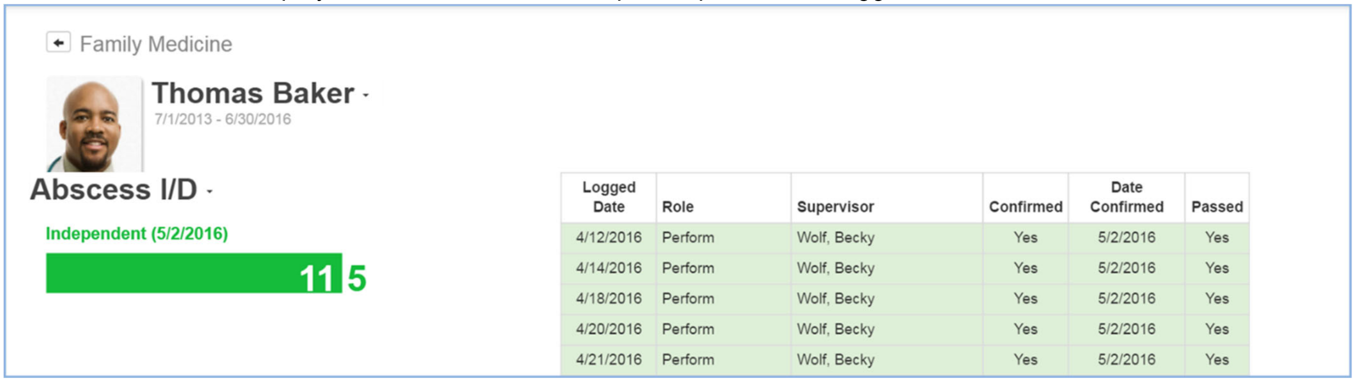
All Procedures · By Year In Program

1st Year in Residency

Procedure	CPT® Code	Logged	Passed	Not Passed	Target	Scope of Supervision
Abscess I/D		0	0	0	11/5 (100%)	
Arterial line insertion Group: *Group A*		0	0	0	5/5 (100%)	
Aspiration of cyst Group: *Group A*		0	0	0	5/2 (100%)	
Cesarean Section Delivery	59514	0	0	0	6/5 (100%)	

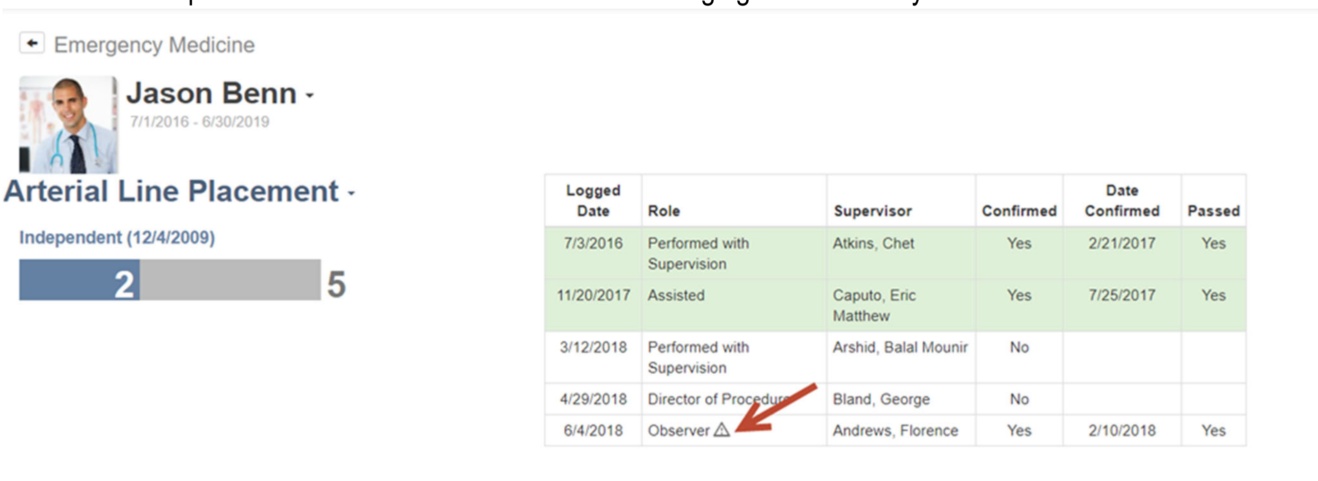
7. Click a specific procedure to view more details about the log. The details for that procedure include:

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



Logged Date	Role	Supervisor	Confirmed	Date Confirmed	Passed
4/12/2016	Perform	Wolf, Becky	Yes	5/2/2016	Yes
4/14/2016	Perform	Wolf, Becky	Yes	5/2/2016	Yes
4/18/2016	Perform	Wolf, Becky	Yes	5/2/2016	Yes
4/20/2016	Perform	Wolf, Becky	Yes	5/2/2016	Yes
4/21/2016	Perform	Wolf, Becky	Yes	5/2/2016	Yes

8. Click the arrow to return to the previous screen.
   Role in procedure that does not count toward Privileging is indicated by an icon:



Logged Date	Role	Supervisor	Confirmed	Date Confirmed	Passed
7/3/2016	Performed with Supervision	Atkins, Chet	Yes	2/21/2017	Yes
11/20/2017	Assisted	Caputo, Eric Matthew	Yes	7/25/2017	Yes
3/12/2018	Performed with Supervision	Arshid, Balal Mounir	No		
4/29/2018	Director of Procedure	Bland, George	No		
6/4/2018	Observer ⚠	Andrews, Florence	Yes	2/10/2018	Yes

Advisee Report

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

- Go to **Logger** > **Advisee Report**
- Select the resident(s)
- Select the procedure(s)
- Show All Dates or Specify Dates
- Click View report

Advisor Report

Jason Michael Benn

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

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

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

Supervisor Reports

Allow administrators to monitor the progress of conformations that have been assigned to supervisors. The Supervisor Totals report displays both confirmed and unconfirmed procedures. Alerts can be sent to the supervisors on the 'Unconfirmed Totals' report. Go to **Logger** > **Supervisor Reports** to view these reports:

Supervisor Totals Report

Statistical summary for Supervisors in this Department/Division.

Supervisor Totals Report

FM-Family Medicine
Date Range: All Dates
Created: 6/15/2016 9:55:17 AM
Return to Report Listing

Date Range
Show All Dates Specify Dates
From To

Adjust Report

Supervisor Name	Total	Total Confirmed	Total Unconfirmed	Passed	Not Passed	Refused
Andersen, Harry	6	5	1	5	1	0
Antonucci, Michael	70	47	23	47	23	0
Archer, David	2	2	0	2	0	0
Beres, Amanda	61	31	30	31	30	0
Black, James	6	6	0	6	0	0
Jones, Robert	31	31	0	31	0	0
Matthews, Kathy	17	4	13	4	13	0
Motts, Frank	5	5	0	5	0	0
Schmidt, Denise	4	4	0	4	0	0
Wolf, Becky	11	11	0	11	0	0

Export to Excel

Unconfirmed Totals Report

Total of Unconfirmed Procedures by Supervisor in the Program you are logged in to. Send reminder emails from this Report. Supervisors from other Programs do not appear on these reports.

Unconfirmed Procedure Totals

FM-Family Medicine
Date Range: All Dates
Created: 6/15/2016 9:56:02 AM
Return to Report Listing

Date Range
Show All Dates Specify Dates
From To

Adjust Report

	Supervisor Name	Total Unconfirmed
Send Alert	Andersen, Harry	1
Send Alert	Antonucci, Michael	23
Send Alert	Beres, Amanda	30
Send Alert	Matthews, Kathy	13

Export to Excel

Extract Data

This tool creates an XL file or tab-delimited text file with a list of all procedures logged in your department (if you have level 5 or 6 Logger privileges). Residents and fellows can extract a personal list of procedures logged in a program.

1. Go to **Logger** > Tools column: **Extract Data**
2. Specify dates if you want to extract procedures for a specific date range
3. Select either:
    - Extract to tab-delimited text file
    - Extract to Microsoft Excel file
4. The file downloads. You can click to open it from the bottom right corner of your browser.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	CaseID	ResidentI	ResidentL	ResidentF	ResidentN	PatientID	PatientGe	PatientDa	Location	DatePerforme	Diagnosis	Procedure	Superviso
2		59	Abramo	Timothy			Unknown			3/20/2006			103
3		59	Abramo	Timothy			Unknown			3/20/2006			103
4		59	Abramo	Timothy			Unknown			3/21/2006			65
5		59	Abramo	Timothy		z123-6123	Unknown			3/21/2006			103
6		59	Abramo	Timothy			Unknown			3/21/2006			103
7		283	Abrams	Justin			Unknown			2/18/2010		Umbilical	30
8		495	Adams	Bryan			Unknown		Rush Inter	6/30/2009		Clinic	229
9		495	Adams	Bryan		123457	Unknown		Rush Inter	6/30/2009		Clinic	516
10		495	Adams	Bryan			Unknown			9/9/2008	Arrythmia	Arterial Li	503
11		495	Adams	Bryan			Unknown			9/10/2008	Arrythmia	Suture Re	508
12		495	Adams	Bryan			Unknown			9/10/2008	Hypertens	Artierial B	505
13		495	Adams	Bryan			Unknown			10/10/2008	Arrythmia	Arterial Li	498
14		495	Adams	Bryan			Female			4/30/2009		Arterial Li	110
15		495	Adams	Bryan		123456	Male			5/1/2009		Suture Re	498
16	373	1751	Advisorad	Xa			Unknown			8/6/2015	Cholera	Amputatic	1077
17	374	1751	Advisorad	Xa			Unknown			8/6/2015	Croup	Amputatic	1044
18	375	1751	Advisorad	Xa			Unknown			8/6/2015	Barrett's E	Amputatic	1044
19	376	1751	Advisorad	Xa			Unknown			8/6/2015	Barrett's E	Amputatic	1911
20		834	Afzal	Yasir			Male		Ghent Fan	7/14/2009	Abnormal	Chronic Di	837
21		834	Afzal	Yasir			Unknown		Ghent Fan	7/31/2009	Abdomina	Chronic Di	877
22		834	Afzal	Yasir			Unknown		Ghent Fan	7/22/2009	Abdomina	Chronic Di	877

	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC
1	Superviso	Superviso	Superviso	Role	PatientCo	InternalID	Passed	Diagnosis	DateConfi	Superviso	ResidentS	ResidentC	PatientTy	PatientAg	Confirme	Delete
2	Atkins	Chet				27	FALSE				PRG 1				0	
3	Atkins	Chet				28	FALSE				PRG 1				0	
4	Jones	Herman				30	FALSE				PRG 1	Procedure went well.			0	
5	Atkins	Chet				31	FALSE				PRG 1	adfadfef			0	
6	Atkins	Chet				32	FALSE				PRG 1				0	
7	Banjou	Bhashan		Assist		890	TRUE		########		PRG 1				1	
8	Williams	Rick				833	FALSE				PRG 3				0	
9	Young	Nick				834	FALSE				PRG 3				0	
10	Daniels	Jack		Assisted		794	TRUE		########		PRG 3			23	1	
11	McQueen	Lightning		Assisted		800	TRUE		########		PRG 3				1	
12	Pablo	Don		Assisted		801	TRUE		########		PRG 3				1	
13	Beam	Jim	Bo	Assisted		802	TRUE		########		PRG 3				1	
14	Andrews	Florence		Performe		826	FALSE				PRG 3				0	
15	Beam	Jim	Bo	Performe		827	FALSE				PRG 3				0	
16	Clintonx	William	D	Performed		2136	TRUE		########		PRG 2		Old		1	
17	Acefilia	Jorge		Performed		2137	TRUE		########		PRG 2		Old		1	
18	Acefilia	Jorge		Performed		2138	TRUE		########		PRG 2		Adult		1	
19	Evalone	Faculty		Performed		2139	TRUE		########		PRG 2		Old		1	
20	Britton	David				863	TRUE		########						1	
21	Brooks	Jackson				901	TRUE		########			rfgwrfwfw			1	
22	Brooks	Jackson				902	TRUE		########			rfgwrfwfw			1	

Other Resident Reports

Other Resident Reports include a variety of ways to view procedure logger data.
Go to Logger > Resident Reports

Custom Report Templates

Name	Created By	Created On	Description
22	Lee, Lisa	4/1/2016	
Resident Procedure Logs	Maxey, Lisa	9/30/2015	
Student/Physician Log Details	NI Personnel	1/10/2007	A listing of Resident Procedure Logs

Only Administrators can create and modify reporting templates.

+ New Report Template

Legacy Reports

Individual Resident Summary	A detailed summary of Resident Procedure Log totals
Resident Summary	A landscape view of Resident Procedure Log totals
Resident Totals Report	Resident Procedure Log totals
Group Comparison Report	Compares Residents to their peers by Status Type and Procedure

Resident Reports

Click on the report name to view these reports:

- Custom Field Totals Report - Resident procedure totals sortable by custom logger field
- Diagnosis Target Report - Resident diagnosis totals
- Diagnosis Report - Resident diagnosis details
- Rotation Report - Listing of resident procedures and rotations

Custom Report Templates

Create your own report template:

1. Click New Report Template
2. Select which Reporting template to use:
    - View Items as a Listing – Generates a report with details of the procedures logged
    - View Items as Totals – Generates a report with a summary of procedures logged
3. Check the items to appear on the report
4. Check any Custom Logger Fields to add
5. Select who can view this Report Template
    - Residents – Allows level 2 users in Procedure Logger to view this report with their own data
    - Low Level Administrators – Permits anyone with a Privilege Level 4 or above in Procedure Logger to view this report for all personnel in the department/division
6. Enter a name for the report
7. Enter a description of the report
8. Click Save

- Generate custom reports:
    1. Click on the name of the report

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

Legacy Reports

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

Importing Logs from ACGME Resident Case Log System

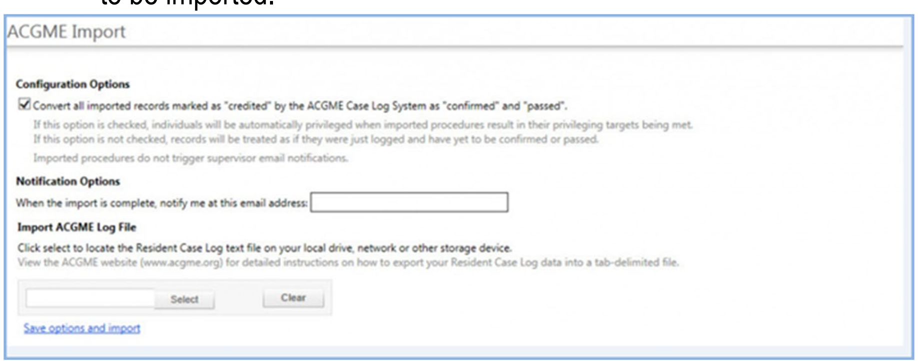
For more information about procedure logger go to help > tutorial videos > [10.6] Procedure Logger-Import Logs from the ACGME

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

Import Logs

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

1. Go to **Logger** > Tools column: **ACGME Import**
2. Choose the Configuration option, if applicable, to convert all records marked as "credited" by the ACGME Case Log System as "confirmed and passed" in the New Innovations System.
3. Enter the email address to be notified when a large import is completed
4. Browse for the file on your computer. The file must be a tab-delimited text file (.txt) and must be smaller than 12 megabytes (mb). If the file is larger than 12 mb, go back to the file and divide it into smaller sections to import.
5. Click Save options and import to upload the file and import the case logs. Logs that imported successfully are listed on a separate report.
6. Logs that failed to import successfully are listed with a code that describes why they were not able to be imported.



Enabling Procedure Logger Auto Login Links

The Auto-Login feature puts a link in notification emails to let users go directly to the area in the software where they can complete tasks without having to go through the conventional login.
In Procedure Logger, you can set up the notices sent to a supervisor when they have a procedure to confirm so that the email contains a link to that person's confirmation page. It is very convenient for the supervisor.

1. Go to **Logger** > Setup column: **Procedure Logger**
2. In the General tab Notifications section, select Enabled for 'Allow Auto Login'
3. Click **Save Configuration**

Manually Adding Procedure Privileges

For more information about procedure logger go to help > tutorial videos > [10.4] Procedure Logger-Privileges, Supervisors & Offsets

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

Add a privilege

1. Go to **Logger** > Tools column: **Manage Privileges**
2. Go to the **Overview** tab
3. Click on the resident's name
4. Be sure Privileges is showing under the resident photo
5. Click on **+New** to add a new privilege
6. Select the procedure from the drop-down list
7. Enter the dates when the resident reached the target number of procedures for the level of supervision reached
8. Click **Save**

Add privileges to multiple learners

Some programs want to give residents privileges on basic procedures at the beginning of training or give rotators privileges when they begin their rotations. With bulk privileging, you set up the Logger to grant specified privileges on a predetermined date to a group of trainees.

1. Go to **Logger** > Tools column: **Manage Privileges**
2. Click **Bulk Privileging**
3. First create Privilege Sets. This is a list of privileges that you will apply to multiple residents at one time.
4. Click **Privilege Set** and give the set a name. For example, if all 1st year residents will be allowed to do some procedures, you can name the group '1st Year Trainees'
5. Then select the level of supervision to apply to all procedures and all residents in this group
6. Highlight the procedures to include and using the plus sign, move them to the box labeled 'Selected Procedures'
7. Click **Save**

Select Resident groups

1. Select the department
2. Choose a group of trainees from the dropdown list (See Note below for In-Rotators.)
3. Highlight the names and move them into the box on the right labeled Trainees
4. Select the Procedure Privilege Set
5. Enter date the resident should be privileged for the set
6. Click **Apply**
7. A modal popup displays the details of what you are about to do
8. Click **Confirm**

Note: To apply bulk privileges to rotators, you must be logged into a principal program and then under 'Choose a group of trainees,' select Search Rotators.

Remove a set of privileges

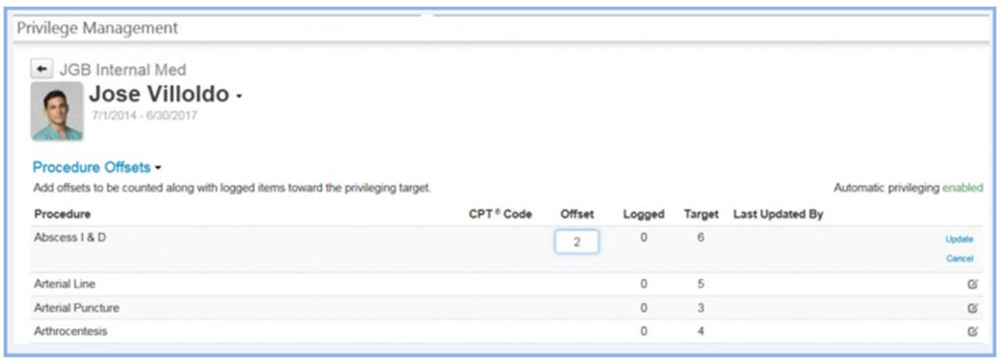
1. Highlight the name of the person
2. Select the Procedure Privilege Set
3. Click on **Remove Set and Apply**

Adding Offsets for Procedures Not Recorded in New Innovations
You may want to give a resident or fellow credit for procedures they performed before using New Innovations. To do this, add an Offset, which is the number of procedures a resident or fellow performed prior to using New Innovations. This eliminates the need to record the procedures one at a time. Offsets can also be used to correct the number of successful procedures a learner's performed.
Example: A third-year resident has performed 10 LPs during her training. Add the number 10 to her LPs recorded in New Innovations.

Adding Procedure Offsets

Current Residents

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



Past Residents

You may need to add offsets for past residents to update their records.
If the resident has been archived, you'll need to temporarily unarchive them.

1. Go to **Personnel** > **Personnel Records**
2. Pull up their record
3. Click **Unarchive**

Apply offsets

1. Go to **Logger** > Tools column: **Manage Privileges**
2. Select any current resident
3. Click the arrow beside the resident's name and select your past resident
4. Click the arrow beside 'Procedures' and select Procedure Offsets
5. Click the edit icon for the procedure
6. Add the number of offsets
7. Click **Update**

Once you have added the offsets, be sure to archive the resident again.

1. Go to **Personnel** > **Personnel Records**
2. Pull up their record
3. Click **Archive**

Making Someone a Procedure Supervisor

A supervisor oversees a learner as they perform a procedure.
Supervisors have the responsibility to approve and confirm procedures. When the targeted number of procedures has been approved, the resident can become 'privileged' to perform the procedure within levels of supervision. Use Bulk Privileging to grant privileges to multiple residents at one time.

You can make someone a supervisor for any procedure, or for specific procedures only

Make a Supervisor for Any Procedure

Anyone with a Level 3 privilege in the Procedure Logger module will automatically be listed as a Supervisor for any procedure in their department.

1. Go to **Personnel** > **Personnel Record**
2. Select the person from the dropdown list
3. Click **Security & Privileges**
4. You want this person to have a '3' in the PL, Procedure Logger, column
    - Privileges are not cumulative, for example, "4" does not equal "all the privileges of 3 and more"
    - Add a "3" itself so that you see "3, 4"
5. To add a 3, click **Edit** on that row
6. Check the box in Level 3 for Procedure Logger
7. Click Save and Return

Make Supervisor for Specific Procedures

In some institutions, residents and fellows are allowed to supervise others in procedures they've been privileged to perform. This guide provides two methods to get the residents and fellows on the supervisor lists. Use the first method to grant procedure privileges for a person in more than one department. An example would be if a resident in a combined Med/Peds program needed to be in the supervisor list for a procedure in both Medicine and Pediatrics.

1. Go to **Logger** > Setup column: **Supervisors**
2. Select the person's name from the dropdown
3. Select a program/department where you want this person to supervise a procedure
4. Click Apply Filter to pull up the list of the other department's procedures
5. Check **Assigned** on any procedure the person should be able to supervise
6. Click **Save Selections**

What does the Privileged column mean?
A "Yes" in the Privilege column means the person has some level of supervision recorded for that procedure. This does not necessarily mean the person has Independent privileges in this procedure.

Granting Staff Access to Learners' Procedure Privileges

Nurses and other clinical staff often need to know which residents are capable of performing which procedures.

They can check via:

- A learner's privilege badges on the New Innovations Mobile App
  No setup needed. Just tell your staff they can view privileges on a learner's app
- Via Logger after you've set up either of the following configurations:
  A. Setup individual records: give each staff member their own record in Personnel and let them log in using their own username and password
  B. Setup generic record: creating a generic Nurse record (for example) that all nurses use to check residents' credentials

Setup Individual Records

MMCGME can give each nurse, physician's assistant and other clinical staff their own record in Personnel. Using this method gives each person their own unique username and password to log into New Innovations.

Here are the step-by-step instructions for adding these Personnel records:

Step 1: Essential Information

- Enter last name
- Enter first name
- Optional: Enter middle name
- Optional: Enter Social Security or Social Insurance Number
- Select Nurse Work Role
- Click Continue

Step 2: Search for Duplicates

The system automatically checks for duplicate records:

- SSN/SIN Search Results – verifies the SSN entered for this person is not already in use
- Name Search Results – verifies the name entered for this person in not already in use
- Extended Search Results – searches database for similar last or first names

Select one:

- If no duplicates are found, click Continue Adding Information to proceed
- Click Cancel, if the person is already in the database

Step 3: Additional Information

Department Information

- Department/Division - Select the department/division
- Status - Select Nurse

Security and Login

1. Username - The username has been entered
2. Privilege Level - Select Clerical/Switchboard/Nurse (This preset privilege level gives the person access to search Procedure Logger credentials, complete and view evaluations assigned to them and view both the block schedule and assignment schedule.)

Contact - These fields are optional and can be entered later.

1. Primary Email
2. Work Phone
3. Work Extension
4. Pager
5. Pager Extension
6. Home Phone

Other - These fields are optional and can be entered later.

1. Gender
2. Suffix
3. Date of Birth
4. Start/Hire Date
5. Credentials - Click Add a credential, select the credential, and click Add.

Click Add person

Setup Generic Record

MMCGME can create a generic Nurse record in Personnel that allows nurses, physician's assistant and other clinical staff to login using this generic record to log into New Innovations. Here are the step-by-step instructions for adding this type of Personnel record:

Step 1: Essential Information

1. Enter last name: Nurse
2. Enter first name: Nurse
3. Select Nurse for Work Role (Physician Assistant and Other are also available)
4. Click Continue

Step 2: Search for Duplicates

The system automatically checks for duplicate records:

- SSN/SIN Search Results – verifies the SSN entered for this person is not already in use
- Name Search Results – verifies the name entered for this person in not already in use
- Extended Search Results – searches database for similar last or first names

Select one:

1. If no duplicates are found, click Continue Adding Information to proceed
2. Click Cancel, if the person is already in the database

Step 3: Additional Information

1. Department Information
    1) Department/Division - Select the department/division
    2) Status - Select Nurse
2. Security and Login
    1) Username - The username has been entered (It will probably be nurse)
    2) Privilege Level - Select Clerical/Switchboard/Nurse (This preset privilege level gives the person access to search Procedure Logger credentials, complete and view evaluations assigned to them and view both the block schedule and assignment schedule. Further edits can be made later within the record.)
3. Click Add person

Direct Observations: EPAs (Mobile Assessment Tool)

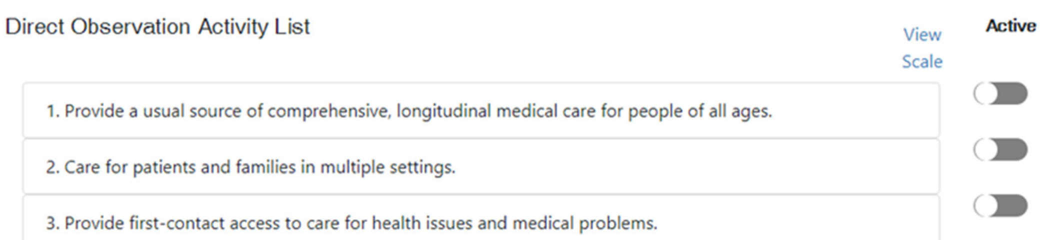
If your program's specialty has published EPAs, you can enable EPA Direct Observations.
Direct Observations are:

- Learner-driven assessment
- Via the New Innovations Mobile App
- Designed to maximize faculty feedback

Turn it on

1. Click **Logger** > **Direct Observations**
2. Open the **EPAs** tab
3. If you administer to multiple programs, pick a program

4. If you see a list of available activities, that means:
   - This program's specialty has published EPAs
   - You can activate any EPAs on the list
     These EPAs are not tied to any EPAs you may have built for use in evaluation forms. Those EPA questions are not available here.



5. If you don't see a list:
   - This program's specialty hasn't published any EPAs
   - You can't enable direct observations for this program
6. Click to activate any activity

 flips to → 

Activate them all, or pick and choose those you want your program to focus on

7. As soon as you activate anything, your learners gain the Direct Observation tile on the mobile app:

What if I deactivate an activity?
We'll store any collected data for deactivated activities, but your learners won't see it anymore as an activity to record
What if I deactivate all activities?
The Direct Observation tile disappears from the mobile app for any program with no active activities

8. Consider spreading the word about the new assessment tool:

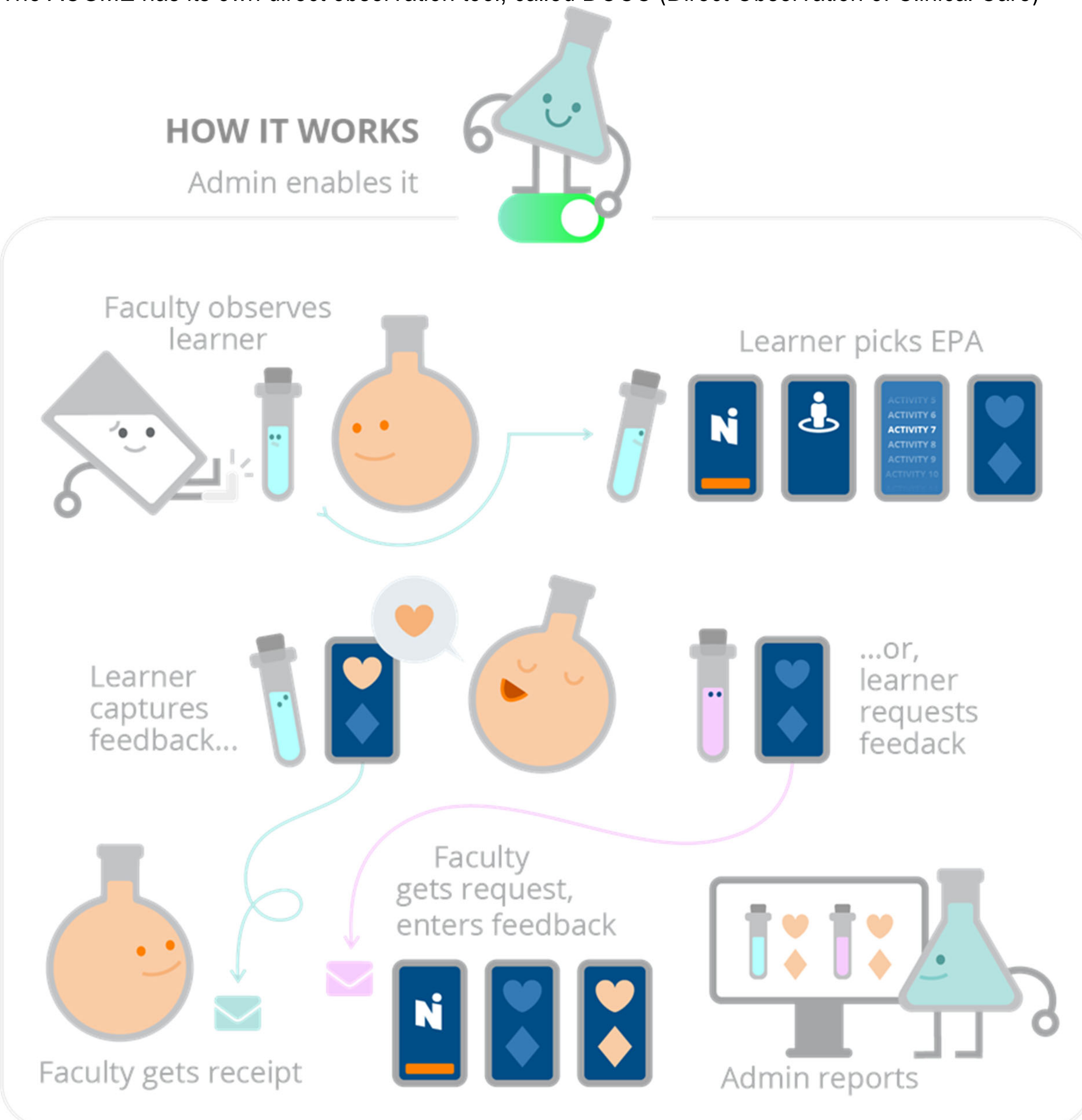
Report

You can see who has logged what direct observations, scores and comments through reports

1. Click **Logger** > **Direct Observations**
2. You land in the **Reports** tab
3. Choose a program
4. Choose a date range
5. Comments aren't visible on the web. Export the report to view comments:
    a. Click  near the top right of the report
    The CSV downloads
    b. Look for your downloaded report at the bottom of your browser or in your computer's **Downloads** folder

ACGME DOCC

The ACGME has its own direct observation tool, called DOCC (Direct Observation of Clinical Care)



Importing ACGME DOCC Data

If you use the ACGME's direct observation tool

1. Go to **Logger** > **Direct Observation Tools**
2. Click the **DOCC** tab
3. Pick a program. This program should hold the same learners whose DOCC data you want to import.
4. Find the DOCC download on your computer
5. Click **Upload**
6. Confirm or edit matches
   We match learners in the program to DOCC data using email addresses
   - Click to confirm each match
   - Or click the dropdown to choose another learner

Report on DOCC data

1. Go to **Logger** > **Direct Observation Tools**
2. Click the **Reports** tab
3. Optionally filter by date of observation

Intro to Log Books

Log Books can be used to gather data not collected by other modules. For example, a department wants learners to log reading assignments. The administrator could create a log book with text fields such as:

- Author
- Date
- Title
- Citation
- Date Logged

A log book can be shared with other departments. For example, the Department of Medicine could create a log book and shares with all of the Medicine sub specialties. However, unless a log book is shared with another department, only the people in the department where the log book was created can add and view entries. Log books can be configured to allow different work roles to view the entries.

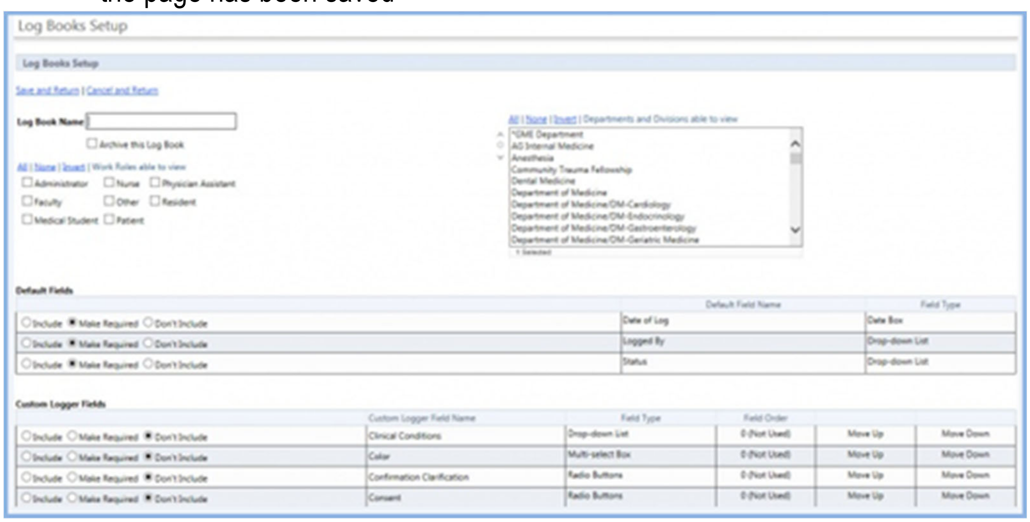
Access

The following privilege levels have access to the Log Books module:
Level 6 - Configure module; Create & modify custom fields; View all department logs and reports; Add & modify logs
Level 5 - Configure module; Create & modify custom fields; View all department logs and reports; Add & modify logs
Level 4,3,2,1 - Add & modify own logs; View own log reports

Creating Log Books

Log Books can be used to collect data that isn't captured in any other module in the software. Create custom fields and then put them together for the Log Book.

1. Go to Logger > Log Books
2. Click **Setup Log Books** in the top right corner
3. Click **New**
4. Enter a name for the log book
5. Select the work roles that can view and log entries to the log book. Keep in mind that checking these work roles does not allow that work role to add entries, only view them.
6. Select the departments that can view and log entries
7. Select the default fields that should be included:
    - Include - Makes this an 'Optional' field.
    - Make Required - Makes this a 'Required' field for users. They will not be able to save their Log Book until this field is completed.
    - Don't Include - This field will not appear in the Log Book.
8. Select the custom fields to 'Include' or 'Make Required' in this log book.
9. Click Save and Return
10. Custom Fields can be put into a specific order by using the 'Move Up' and 'Move Down' links after the page has been saved



Managing Log Books

Manage your log books by adding, editing or deleting entries and archiving books.

Add an Entry

1. Go to **Logger** > Log Books
2. Click Add New Entry beside the Log Book you want to add an entry for.
3. Entering your information
4. Save your entry:
    1) Save and Retain - Saves the entry and keeps the data on the page for continued logging
    2) Save and Clear - Saves the entry and clears the data

Log Books

Set Up Log Books

Log Books				
Log Book Name				
Elective Rotations	Add New Entry	View Log Book Entries	Generate Report	Deleted (0)
Patient Statistics	Add New Entry	View Log Book Entries	Generate Report	Deleted (0)
Remark	Add New Entry	View Log Book Entries	Generate Report	Deleted (0)
Resident Educational Activities	Add New Entry	View Log Book Entries	Generate Report	Deleted (1)

View Log Book Entries

Log book entries can be viewed, edited and deleted.

To view the entries in Log Books:

1. Go to **Logger** > **Log Books**
2. Click View Log Book Entries for the specific Log Book
3. View all logs made in your program
4. Click **Search These Entries** to search by person and/or date range.

By default, only the date of the log, the name of the person who logged the entry and that person's status are shown. Use the customizing your view link at the top of the page to include all fields in the log book.

Delete an Entry

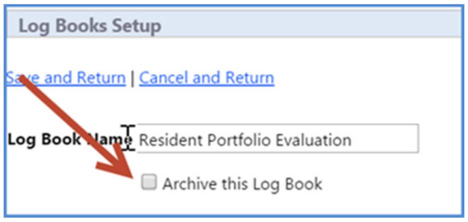
Log Book entries can be deleted by an administrator.

1. Go to **Logger** >**Log Books**
2. Click View Log Book Entries
3. Click **Delete** to remove an entry

A Log Book or Custom Field cannot be deleted if there are logs associated with it.

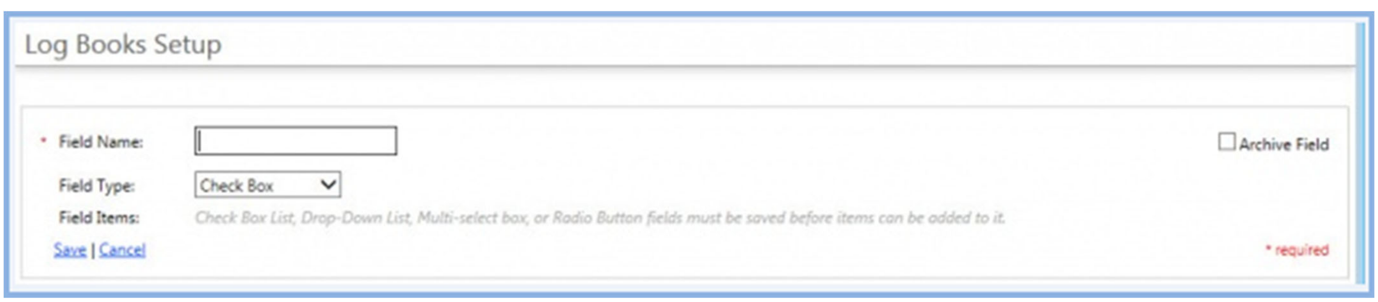
Archive a Log Book

1. Go to **Logger** > **Log Books**
2. Click Edit beside the item to archive
3. Check the **Archive** check box
4. Click Save and Return



Create a Custom Field

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



Multi-Select Items

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

1. Enter the first item in the list in the text box
2. Click Add New Item
3. Continue until all items have been entered.
4. Move them up and down on the list in the order they should appear
5. Use the Edit and Delete links to change or delete an item

Add Custom Fields to Log Book Forms

1. Go to **Logger** > **Log Books** > **Set Up Log Books** in the far right > **Books** tab
2. Select one:
   - Click New to create a new Log Book
   - Click Edit to add the custom field to an existing Log Book
3. Scroll down to Custom Logger Fields
4. Select one:
   - Click Include to place the custom field on your form
   - Click Require to place the custom field on your form and make it mandatory before the user can save their Log Book.
   - Click Don't Include to remove a custom field from your form
5. Click Save and Return

Edit Custom Fields

- Go to **Logger** > **Log Books** > **Set Up Log Books** in the far right > **Custom Fields** tab
- Click Edit beside the field to edit
- Click Save

You cannot edit a custom field in use.

Reporting on Log Books

You can see a count of how many entries a person has logged or view the details of each entry.

The reports *do not* tabulate the data in the entries.

Generate report

Generate a report of Log Book entries by person and by specific dates:

1. Go to **Logger** > **Log Books**
2. Click **Generate Report** beside a Log Book
3. Select the person
4. Select one:
    - Show all dates
    - Specify Dates. Enter a date range for the report.
    - Click View Report

The Advanced Filters can be used to view only selected departments, entries by Work Role or include archived personnel.

The data in the report must be edited in the log book itself. Once the edits have been made, rerun the report to show updated information.