New Innovations (RMS) Portfolio Module FAQs- Semi Annual Reviews

Metro MN Council on Graduate Medical Education

2026

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FAQ: I've created a Review template and assigned it to a resident. How do I get the results to be generated overnight?

Follow the steps below to have an assigned Portfolio Review generate results overnight:

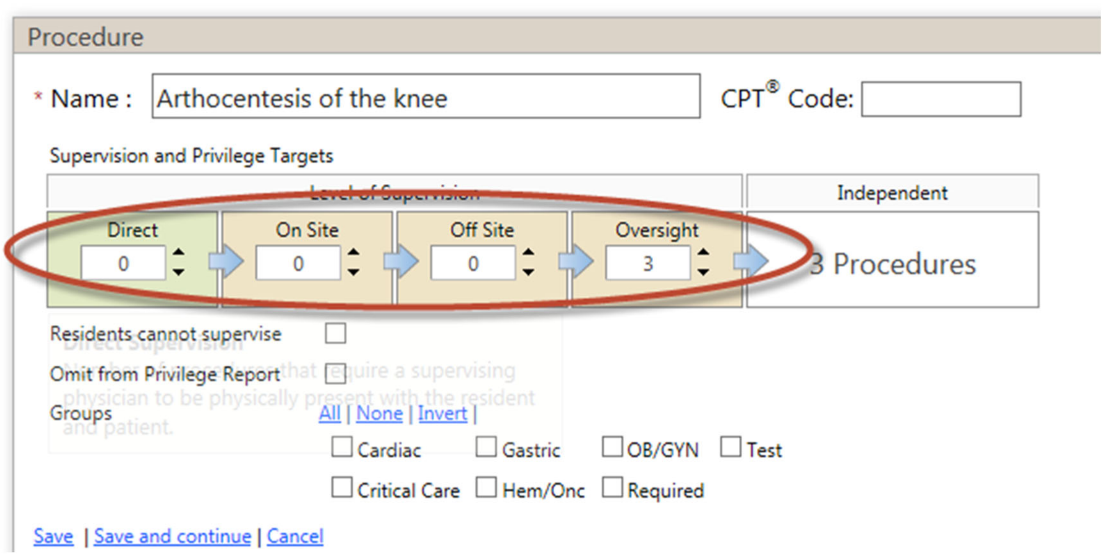
1. Go to *Portfolio > Manage Reviews*
2. Click **View** in front of the review you want to generate
3. Click **Schedule Data Capture**

FAQ- Why aren't my residents' procedures showing up in their portfolio reviews?

In order for there to be any procedures showing on the Semi-Annual Review, each of the procedure names must have a target established.

To check:

- Go to Logger>*Setup > Lists and Fields*
- Click the tab labeled **Procedures**
- Click **Edit** next to one of the procedures to make sure that targets have been established



FAQ - Why don't my resident's milestone scores show up in their portfolio reviews in the milestone widget?

Likely this has to do with the dates of your portfolio review compared to the date of the milestone review.

Milestone scores will only show up if the date of the milestone review falls within the dates of the portfolio review. For instance, if your portfolio review dates are July 1st thru September 30th, no milestone scores would show up because neither June nor December (the dates of the milestone reviews) falls within July thru September.

Note: Sometimes the browser you use causes milestone graph to display incorrectly. Try changing browsers to correct the display.

FAQ - Why aren't there results for my residents under the Competency by Rotation widget?

The Competency by Rotation widget has several parameters that must be met in order for data to pull into the widget.

- This widget only pulls data from traditional evaluation forms. It does not include information from evaluation forms which use subcompetencies, milestones, EPAs, or custom subcompetencies.
- Primary rotations will be listed as they appear in the evaluation match (results from evaluation matches with unspecified rotations will not display on this widget)
- Evaluation results will be displayed if:
    - The primary rotation end date on the block schedule falls within the configured review time period, and
    - The match's end date falls within the scheduled rotation
- Evaluation results are included only for Rating scale responses to evaluation questions that have been attached to a category(tag) that is associated with a core competency

FAQ - Why is some of the text in blue and some in black when using the "Evaluations Comments-All" widget?

The blue text denotes the text of the question, while the black text denotes the actual comments made.

FAQ - Why is there no data for my residents when I create a portfolio review for them?

Make sure that you have selected the desired widgets to collect the data for each of your residents and that the data to be collected fits the criteria for each.

FAQ - Are all evaluation comments included when using the "Evaluation Comments-All" widget?

No, the following comments are **not** included:

- Comments from evaluations that are on hold
- Comments associated with questions that are from EPA's, Subcompetencies, Custom Subcompetencies, or Milestones (general comments from evaluations with these types of questions will appear, however)
- Comments from evaluations initiated from other departments (this is a default setting but if you wish to include these, you can customize this widget to include them)

The date of the match can also exclude comments. By default, matches with end dates that fall within the review dates will appear. You can customize the widget to change it from the review period to the resident's overall residency dates. You can also customize this widget to only include comments that were physically completed during either the review period or residency period.

FAQ - Why are all test scores for my residents showing up on their portfolio review?

By default, any test scores that were recorded for a resident in their demographic record will be included, as long as it was taken during their residency period. You can filter the list of types to be included, however, you cannot filter to only include them for a designated date range.

To filter the types of scores included, customize the Test Scores widget and check the box that reads "Filter Test Score Types". Click on the types to be included and click **OK.**

FAQ - Is there a way to permit other people to sign a Portfolio review?

For a **Semi-annual** portfolio review, by default the only signatories are:

- The person who is designated as the subject's program director in the program demographics table (Administration>Program>Personnel)
- The subject's advisor as designated in the subject's demographic record (Personnel>Personnel Data>Basic Information)

For an **Advisor** portfolio review, by default the only signatory is

- The subject's advisor as designated in the subject's demographic record (Personnel>Personnel Data>Basic Information)

Changes to signatures after reviews have been created, can be done in a few ways:

- Delete the reviews already created
- Edit the form used to create the reviews
- Re-create the reviews using the edited form

or

- Edit the form for each review

Other people can be given permission to have full access or to simply view portfolio reviews as well as provide comments but they cannot sign the reviews. These include any person designated as an Associate Program Director of the subject (Administration>Program>Personnel) or members designated as part of a review team:

FAQ- Why didn't my program director receive a notification that reviews are ready after I manually captured the review data?

Notifications to signatories are designed to be sent only after the system automatically captures data based upon either a meeting date (captured 7 days prior) or based upon the review period (the evening of the last day of the review period).

Manual capture is chiefly designed to recapture data after changes and settings have been made that will alter results, so it was not designed to notify signatories. If you want the system to send auto notifications it is best to set the meeting date for 8 days from the current date so that an auto capture will occur seven days prior to that date. When the auto capture occurs, the signatories will also receive notification in their consolidated email that same day.

FAQ: Is there a way to prevent a resident from seeing their portfolio review?

No, there is not a way to do this. Once a review is created, it can be seen by the resident. Locking it only prevents the widget data from being captured.

Keep in mind however, that you can modify the default subject view access from including data captured, comments and performance indicators to only seeing data captured. Here is how you can see this setting and make changes if desired:

1. Go to **Portfolio** > **Reviews**
2. Click **View** to the left of the person's review
3. Click **Form Settings**
4. Under Access, click **Set Permissions**
5. Select View Access without Sensitive Information
6. Click **Save**

FAQ - How will a program director know if they have portfolio reviews to complete?

In the Notifications section of your PD's home page, there's a section labeled "PORTFOLIO". Notifications appear for upcoming meeting dates or review periods or for reviews with required signatures.