

New Innovations (RMS) Portfolio Module (Reviews, Journals & Scholarly Activities)



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Portfolio Reviews

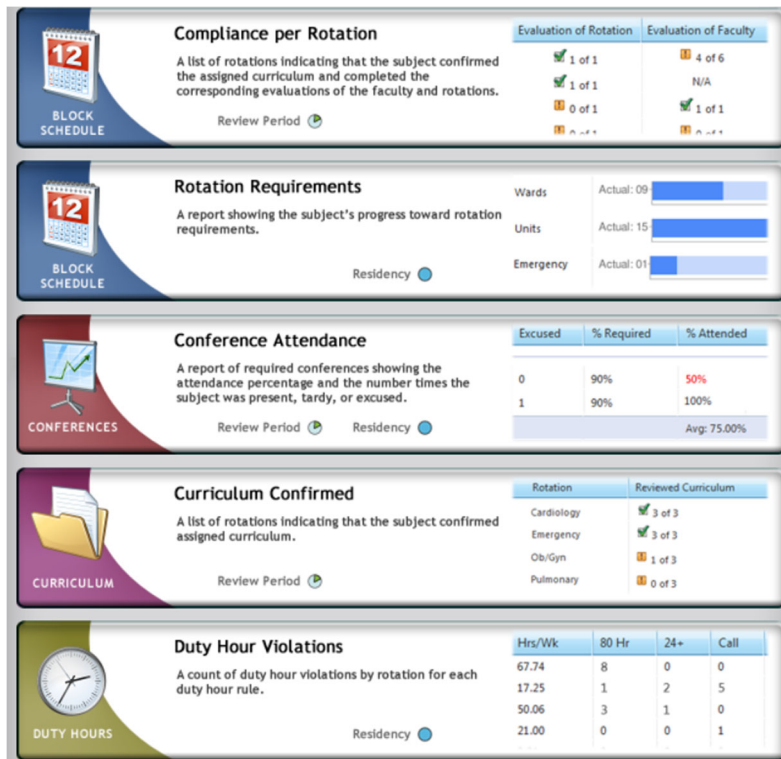
Portfolio Module-Semi Annual Reviews

Intro to Semi Annual Reviews

The Portfolio Review is designed to contain and organize evidence of learning and that trainees are working towards goals and objectives set by their program. Program administrators can configure the module to capture the information their program uses for reviews.

Reviews gather trainee performance data from many areas of the software to facilitate semi-annual Program Director (PD) reviews and quarterly Advisor Reviews. It offers customized performance feedback and centralized Portfolio Review Management. Some of the reporting areas include Evaluations, Milestones, Procedure Logger, Schedules, Personnel, Curriculum, Duty Hours, Conferences and Scholarly Activities. Only people with the work role of Resident can be scheduled for a Portfolio Review and the reviews only pull data for the resident's current program.

The PD and coordinator choose the type of data to be collected by choosing the appropriate widget (report). Here is a sample of available widgets that can be included in a review:



Access

These privilege levels have access to Portfolio Reviews:

- Level 6 - Setup and maintain Portfolio Reviews
- Level 5 - Setup and maintain Portfolio Reviews
- Level 4 - Maintain reviews; Generate reports; Cannot design form templates, nor set up Review Teams
- Level 3 - N/A
- Level 2 - View and sign your own Review, if Access is granted on Form Template
- Level 1 - N/A

Access to Portfolio Reviews goes beyond the Security and Privilege levels shown above. Special access must be given to the Subject, Advisor, Program Director, Associate Program Director and Review Team. Instructions on how to provide access will be given when creating your Review form.

Full Access - Manage unlocked forms, capture data, view comments, change progress indicators, modify the review period, and upload documents

View Access with Sensitive Information - View form with comments and progress indicators

View Access without Sensitive Information - Can view form without comments and progress indicators

No Access - Cannot view form

Glossary

Data Capture - A data capture is the process of gathering information about your resident. It gives you a snapshot view of your resident's performance information. Data captures can be done manually or scheduled in advance.

Form Template - A Form Template is designed by an administrator to specifically meet your program's needs. When designing the Form Template, you select from various reporting widgets and determine who has access to the data. Once the data has been gathered for each resident into the Form Template, the Portfolio Review is ready to be viewed.

Portfolio Review - The Portfolio Review is a summary report of resident performance data. These are typically done on a semi-annual basis by Program Directors and on a quarterly basis by Advisors. A Form Template is created, the data is captured and the Portfolio Review is ready for signing.

Widget - A reporting widget gathers data about a certain module, such as Evaluations and Procedures. The administrator selects and arranges the widgets on your Portfolio Review form.

Preparing to Use Portfolio Reviews

The Portfolio Reviews feature integrates many pieces of the software suite. In order to make the best use of the reporting widgets, we recommend taking some steps to ensure that you get optimum results.

Prepare Personnel Records

Trainee Record

Be sure that each resident and fellow has a Training Record in their Personnel Record.

1. Go to **Personnel > Personnel Records**
2. Select a resident's record
3. Click **Training Record**
4. Review dates and status for accuracy

Program Directors and Associate Program Directors Personnel Records

Semi-Annual Reviews are conducted by Program Directors or Associate Program Directors. You can identify who these people are in advance by making sure they each have a record in Personnel and that they are identified in the Personnel section of your program. Having this information in the system ensures they will be automatically included in the review.

1. Go to *Administration > Programs > Personnel*
2. Click **Designate a Program Director** or **Designate an Associate Program Director**
3. Select the correct person
4. Click **Save**


Personnel Configuration

Admin

Faculty

Residents

Program Director



Julie Renee Kirker

jkirker@new-innov.com

Mobile: 33057849494

Work: (330) 456-9876

Pager: (330) 456-7888


[Change Program Director](#)

Signature


Choose File

No file chosen

Appointment Start Date



Appointment End Date




Is Program Director also Department Chair?

☐ Yes

☒ No

Associate Program Directors

[Designate an Associate Program Director](#)



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Work: (330) 499-3434

Pager: (330) 856-7777

[Change Associate Program Director](#)

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Add Advisors

Advisors can be automatically included in the resident review by adding them to the resident's Personnel file.

1. Go to *Personnel > Personnel Records*
2. Select a resident's record
3. Click **Basic Information**
4. Select the Advisor
5. Click **Save and Return**

Arthur, David
Resident - Pediatrics

Filter List Advanced Search

Demographics Schedule Verifications Files & Notes

Complete Record Summary

Basic information

Changes for the following items are made in the current [training record](#).

Department: Pediatrics
Program: Pediatrics (Program Number: 328989890)
Program Dates: 7/1/2012 to 6/30/2015
Post Graduate Year: 3
Status: PRG 3

Create/Edit Basic Information

[Save and Return](#) | [Apply Changes](#) | [Cancel](#) | [Show History](#)

* \$ **Last Name:** Arthur
* \$ **First Name:** David
\$ **Middle Name:**
Suffix:
Preferred/Nickname:
Title:
Gender:
Primary Email: [wjones@New-Innov.com](#)
Credentials: [Add a credential](#)
\$ **Employer:**
Compensation Status:
Start/Hire Date:
Termination Date:
Advisor: ☐ Show all faculty
* indicates advisor is not from currently logged into department.
National Provider Identifier (NPI):
Military Service:
* required \$ required BRS information

[Save and Return](#) | [Apply Changes](#) | [Cancel](#) | [Show History](#)

Notes:
• Status refers to a trainee's level in their Program.
• Statuses assigned to other personnel can be similar to job descriptions, such as 'coordinator' or 'nurse'

Prepare New Innovations Modules

Portfolio Review pulls data about your residents and fellows from each module in the software. For best results, we recommend that the following features be prepared in the software before creating your Portfolio Reviews.

Module	Task	Path
Administration	Make sure correct accreditation specialty is selected for your program	<i>Administration > Program > Configuration</i>
Administration	Check the Advancement Date for your program	<i>Administration > Program > Configuration</i>
Administration	Specify the Program Director and Associate Program Director in Program Personnel	<i>Administration > Program > Personnel > Admin tab</i>
Personnel	Enter all resident and fellow profiles	<i>Personnel > Add New Person or Personnel > Tools > Import ERAS Data</i>
Personnel	Make sure residents have an accurate training record	<i>Personnel > Personnel Records > Training Record</i>
Personnel	Assign Advisor to residents and fellows	<i>Personnel > Personnel Records > Basic Information > Advisor</i>
Personnel	Enter Certifications	<i>Personnel > Personnel Records > Certifications</i>
Personnel	Enter State Licenses	<i>Personnel > Personnel Records > Licenses</i>
Personnel	Enter Test scores	<i>Personnel > Personnel Records > Test Scores</i>

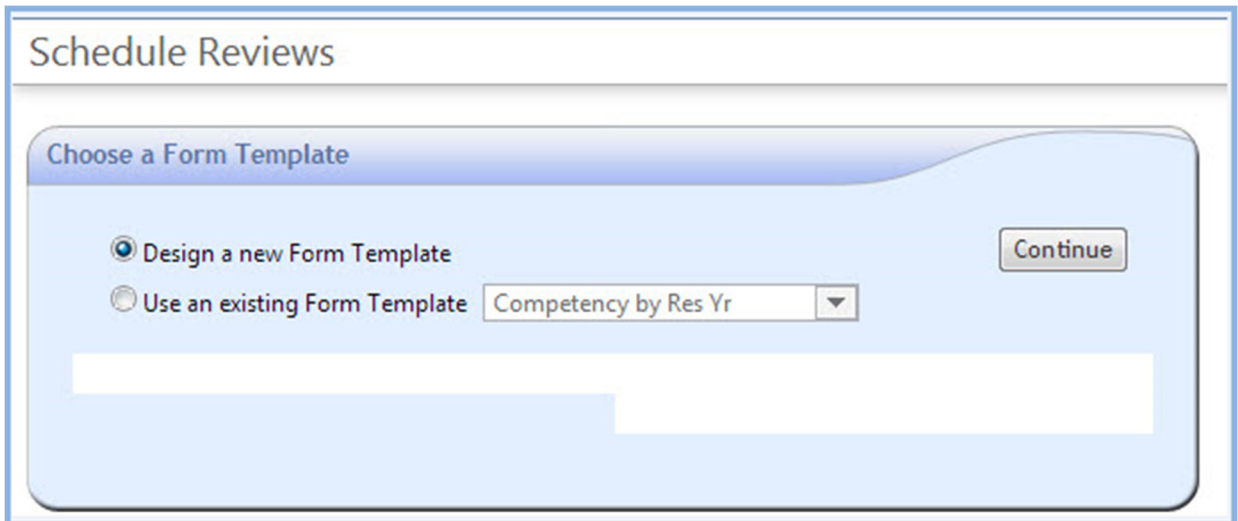
Module	Task	Path
Schedules	Check that rotations, status type and program are correct in the resident and fellow block schedules	<i>Schedules > Schedule Rotations > Select Resident</i>
Schedules	Configure Rotation Requirements	<i>Schedules > Block Scheduling > Setup > Rotation Requirements</i>
Schedules	Upload and assign curriculum for rotations	<i>Schedules > Curriculum > New or Edit Existing</i>
Schedules	Check to see that the assignment definition for Continuity Clinics is marked is a Continuity Clinic	<i>Schedules > Scheduling Assignment > Setup > Assignment Definitions</i>
Schedules	Assign residents to the continuity clinic	<i>Personnel > Personnel Records > Continuity Clinic Schedules > Assignment Scheduling > Add Continuity Clinic</i>
Conferences	Create Conferences	<i>Conferences > Manage Conferences > Add</i>
Conferences	Take Attendance	<i>Conferences > Configuration & Defaults > Conferences > Record Attendance</i>
Work Hours	Configure Work Hour module	<i>Work Hours > Setup > Basic Configuration Work Hours > Setup > Rule Configuration</i>
Work Hours	Make sure that resident and fellow work hours have been checked by the work hours rules	<i>Work Hours > My Work Hours > View Hours</i>
Evaluations	Confirm that Core Competencies are linked with Categories used on the resident evaluation form	<i>Evaluations > Evaluation Forms > Categories</i>

Module	Task	Path
Evaluations	Create sessions for Resident Evaluation of Faculty, Faculty Evaluation of Resident, and Resident Evaluation of Rotation	<i>Evaluations > Sessions > Add New Session</i>
Procedure Logger	Configure Procedure Logger module	<i>Logger > Configuration > General, Privileging and Fields tabs</i>
Procedure Logger	Enter Roles and establish targets for Procedures	<i>Logger > Lists & Fields > Procedures tab & Roles tab</i>
Procedure Logger	Check that procedure logs have been confirmed by a supervisor	<i>Logger > Confirm Procedures</i>
Portfolio	Check that Core Competencies are assigned to Scholarly Activity forms	<i>Portfolio > Scholarly Activity > Forms</i>
Portfolio	Enter scores on Milestone Reviews	<i>Portfolio > Milestones</i>

Creating Semi-Annual/Advisor/Portfolio Review Form Templates from Scratch

Start a new form template

1. Go to **Portfolio > Reviews**
2. Click **New**
3. If you see **Design Form**, skip to step 4.
If you see **Choose a Form Template**, keep **Design a new Form Template** checked
4. Click **Continue**



5. Enter a descriptive name for the form template
6. Select the type of review - Advisor or Semi-Annual
 - Type only affects who gets permission to comment and sign in the review, and you can always add more permissions to let others comment and sign
7. Optionally, uncheck **Automatically capture the data...**
Checked or unchecked, your review form will have a button on it to manually pull in data to display:

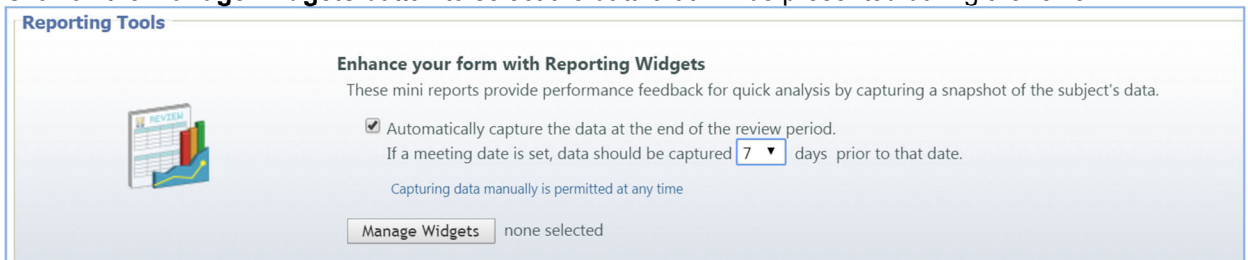
Capture Data Now (removes existing signatures)

- Checked (not recommended):
 - Your form pulls in data on its own
 - You (or any reviewer with Full Access, see Access below) can still click **Capture Data Now** to pull in data before a review
 - We recommend unchecking this option so that you don't have to try to coordinate it with other settings
 - RISK: the form could be completed any time before the auto-capture. If this happens, auto-capture will remove any signatures on the auto-capture date

- You can click on the **7 day(s)** link to select the number of days prior to any review meeting to capture data
- Unchecked (recommended):
 - You (or any reviewer with Full Access, see Access below) can click a button on the form to load data for the form to display
 - You can ignore the **7 day(s)** setting

Add & configure widgets to display learner data to reviewers

1. Click on the **Manage Widgets** button to select the data that will be presented during the review



Reporting Tools

Enhance your form with Reporting Widgets

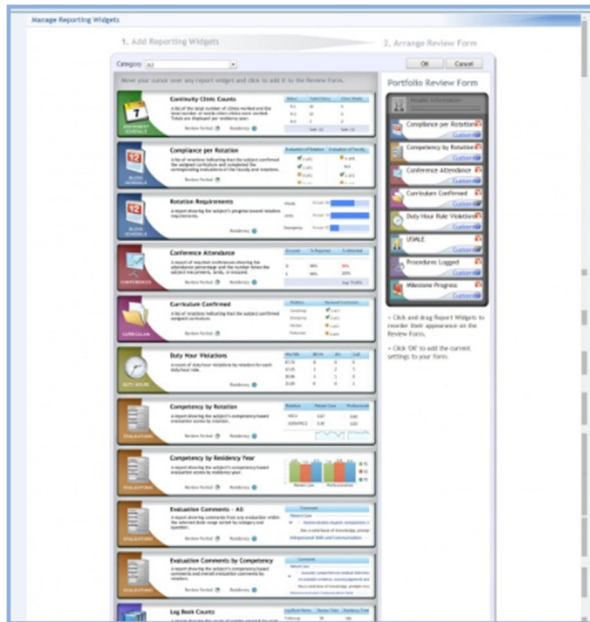
These mini reports provide performance feedback for quick analysis by capturing a snapshot of the subject's data.

☒ Automatically capture the data at the end of the review period.
If a meeting date is set, data should be captured days prior to that date.

Capturing data manually is permitted at any time

Manage Widgets none selected

2. Move your cursor over any report widget to show the Add Widget button.
3. Click Add Widget to move them to the right side of the page and include them on the form
4. Click and drag Widgets on the right side to reorder them in the list
5. Customize Widgets by clicking the Customize icon. For example, on the Duty Hour Violations widget, customize it to see only AOA or ACGME programs.
6. Click the Delete icon to remove a Widget from the list.
7. Click OK to when all Widgets have been selected




Include or remove progress questions

1. Check Overall Progress to provide one indicator of general progress
2. Check Progress per Competency to provide an indicator of each Core Competency

Require additional signatures & enable additional commentators

1. Select who should sign the form
 - Advisor is automatically selected if the form type is Advisor
 - Program Director is automatically selected if the form type is Semi-Annual
2. Select who should be permitted to enter comments
 - Advisor is automatically selected if the form type is Advisor
 - Program Director is automatically selected if the form type is Semi-Annual.
 - If comments are selected for a role, View Access and Full Access are automatically given to that role. (see Access below)

Note: Signatures cannot be deleted once checked by the reviewer or subject. Please contact New Innovations for assistance.



Signatures & Comments

Require signatures from:

☐ Subject
 ☒ Advisor
 ☒ Program Director

Allow comments from:

☐ Subject
 ☒ Advisor
 ☒ Program Director
 ☐ Associate Program Directors
 ☐ Review Team

Set who can see what in Access

- Click Set Permissions
- Hover over the column label to see the access description
 - Full Access: Manage Unlocked Reviews, capture data, view comments, change progress indicators and modify the review period
 - View Access with sensitive information: View form with comments and progress indicators
 - View form without sensitive information: View form only
 - No Access: Cannot view the form
 - For subjects: May capture data snapshot for Reporting Widgets: May capture their own data for widgets selected in the form only after review has been scheduled.
 - Note: If a Subject is given the ability to sign the review or make comments, they must be given access to all sensitive information (progress indicators and comments) so that they know what they are signing.
- Give **Full Access** to anyone you want to be able to manually populate the form with widget data
- Make any other selections
- Click **OK** to save Permissions

New Innovations

SET FORM PERMISSIONS

	Full Access	View Access with Sensitive Information	View Access without Sensitive Information	No Access
Subject	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/> May capture data snapshot for Reporting Widgets				
Advisor	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Program Director	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Associate Program Director	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Review Team	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

OK

Cancel

Save the template

1. Click **Preview Layout** to see how the form will look
2. Check **Save as a new Form Template for future use.**
3. Click **Continue**

Scheduling Semi-Annual/Advisor/Portfolio Reviews

After you've created the review form template you can create individual review forms and schedule the reviews.

Open a review form template

1. Go to **Portfolio > Reviews**
2. Click **New**
3. Choose **Use an existing Form Template**
4. Select the template from the drop-down list
5. Click **Continue**

Choose subjects

Each subject will get a review form for each review period you create in the next step.

1. Click **Add People**
2. To include them in the review, move the learners in the left column to the right column by:
 - Clicking and dragging
 - Highlighting the name and clicking the arrow buttons
 - Double-clicking
3. Click **OK**

Create review periods & forms

1. Enter the start and end date of the review period
2. We recommend skipping **Set Meeting Date** and using an external calendar for scheduling
If you set a meeting date here, it won't be reflected in any calendar but the Portfolio Review calendar
3. Click **Add Review Period**
4. Enter as many review periods as needed.
Each review period will:
 - Create a review form per subject
 - Inform any form widgets set to display the "Review Period"
5. Click **Continue**
6. Confirm which reviews to schedule and click **Schedule Selected Reviews**

Make any edits

1. Click ****View**** to see any review form
2. If you see needed edits, delete all the reviews you just created
3. Edit the template
4. Start back at **1. Open a review form template** to schedule reviews using the edited template

Schedule externally

1. Schedule your reviews using whatever tools you use for scheduling other meetings
 - a. Include a link to this page: <https://www.new-innov.com/Portfolio/Host.aspx?Control=ReviewsByReviewer>
Tell reviewers they'll find a link to the review form in the Upcoming Reviews panel on this page
 - After the end of the Review Period, a link to the review also appears on the reviewer's home page
 - b. Remind reviewers to click the **Capture Data Now** button (at the top right of the form) to load data to the form just prior to the review

Capture Data Now (removes existing signatures)

Managing Scheduled Reviews

1. Go to **Portfolios > Reviews**
2. Select one or several Reviews (Hold down the Control key) and select one of the following actions:
 - Lock & Unlock Reviews - Prevent others from editing or deleting reviews
 - Delete - Delete any unwanted reviews
 - Save Dates - Enter meeting dates for reviews in the list and click Save Dates.
3. Sort the Reviews by using these filters:
 - Type - Filter the types of reviews shown, Advisor, Semi-Annual or Both
 - Signatures - Filter the list of reviews. Show Pending Any Signatures, Signed by All, or Both
 - Locked - Filter the list of reviews by Locked, Unlocked and Both
 - Meeting Date - Filter the list of reviews by Scheduled, Not Scheduled or Both
 - Funnel icon - Filter the list of reviews by several filters including Date Range, Type, Meeting Date, Locked, Signatures and File Attachments. The list can also be filtered by Advisor, Subject or Status Type of Subject.

Click View

Click view in front of a learner's Review, the Review will open allowing you to take these additional actions:

- Edit the configuration of the review form
- Capture data immediately
- Sign the review form
- Add comments
- Adjust the progress indicators
- Attach files
- Print the form
- Create a PDF file of the form

The screenshot shows the 'Portfolio Reviews' interface. At the top, there is a date range selector set to '7/1/2014' to '1/30/2015' with an 'Ok' button. Below this is a toolbar with icons for 'New', 'Delete', 'Save Dates', 'Type', 'Signatures', 'Lock', 'Mtg Date', and 'More...'. The main area contains a table with columns: 'Type', 'Subject', 'Form Name', 'Review Period', 'Meeting', and 'Details'. The table lists three reviews for 'Semi-Annual' type, with subjects 'Baker, Raoul', 'Brooks, Maggie', and 'Carson, John'. The 'Brooks, Maggie' row is highlighted in green and shows a meeting time of '12/15/20 1:00P-2:00P'. Each row has a 'View' link and a 'Details' button.

Type	Subject	Form Name	Review Period	Meeting	Details
View Semi-Annual	Baker, Raoul	Semi-Annual Reviews	07/01/2014 - 12/31/2014		Details
View Semi-Annual	Brooks, Maggie	Semi-Annual Reviews	07/01/2014 - 12/31/2014	12/15/20 1:00P-2:00P	Details
View Semi-Annual	Carson, John	Semi-Annual Reviews	07/01/2014 - 12/31/2014		Details

Click Details

You can also work with one review at a time by clicking the Details link. This allows you to take any of the actions above, as well as more specific actions such as:

- Scheduling the meeting time
- Signing the review or marking it as having a signature on file
- Viewing the review form
- Viewing a list of participants in the review

Review Details

Baker, Raoul Research
JGB Internal Med
Semi-Annual Review
7/1/2014 - 12/31/2014

Meeting

Date: 12/18/2014
Start Time: 2:00 PM
End Time: 3:00 PM

Save Meeting Date/Time

Overall Progress

PC MK SBP PBLI PRO ICS

???

???

???

???

???

???

Subject

× pending signature...

Program Director

× pending signature...

Go to Review Form

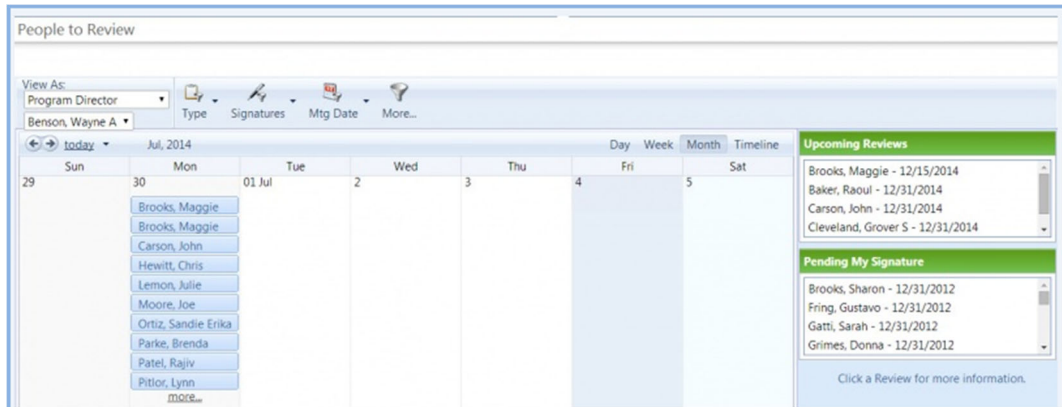
Review Participants

Advisor: Benson, Wayne A
Program Director: Benson, Wayne A
Assoc. Program Directors: Durbin, Nancy Lee
Review Teams: Red Team
[View Members](#)

View Reviews on Calendar

When Reviews are created, they will appear on a calendar.

Go to Portfolio > People to Review



- Reviews will appear on the Calendar according to whether or not they have a Meeting Date scheduled:
- Reviews with a Meeting Date will appear on the calendar on the Meeting Date.
- Reviews with no Meeting Date specified will appear on the calendar on the last day of the Review Period.
- Meeting dates can be scheduled by the administrator, the reviewer, and other participants who have been granted full access to the review.

Send Signature Reminders

You can send reminders to people who need to sign off on a Review

1. Go to Portfolio Reviews > Manage Reviews
2. Click on the Signature Reminders checkbox
3. Put a check in the box beside those to send the reminder
4. Click 'Send Reminder to Selected Signers' send an email
5. or 'Mark Selected Signers as Signature on File' marks the review as signed but doesn't send an email
6. Click 'Back to Review Manager' when finished

Portfolio Reviews

3/12/2017 to 11/12/2017 Ok

New Delete Save Dates Type Signatures Lock Mtg Date More...

Signature Reminders

Click details next to a Review for more information.

Type	Subject	Form Name	Review Period	Meeting	Details
Semi-Annual	Alonzo, Oscar	Semi-Annual PD Review	01/01/2017 - 06/30/2017		

Signature Reminders

People listed below are designated as signers on reviews whose meeting dates (or review end dates) have passed. You can either send an email message reminding them to sign their reviews or mark their signatures on file.

4/12/2017 to 5/11/2017 Ok

Back to Review Manager

Email Reminder to Selected Signers Mark Selected Signers as 'Signature On File'

Signer	Role	Review Name	Subject	Meeting Date	Review Period
Cooper, Pete	Program Director	Derek's Form	McNeal, Ian	(TBD)	07/01/2016 - 04/15/2017
McNeal, Ian	Subject	Derek's Form	McNeal, Ian	(TBD)	07/01/2016 - 04/15/2017

Export To Excel | Export To PDF

Locking a Review

Administrators can lock a resident's Portfolio Review after it has been completed and signed.

When a Portfolio Review is locked

- Administrators can continue to change the widgets, comments or signatures via Form Settings
- No additional files can be attached
- Current attached files cannot be removed
- No additional comments can be added
- Currently attached comments can't be removed
- Those required to sign a review may still do so

Lock a Review Form

There are two ways to lock a Review:

A. Manage Reviews Screen

1. Go to Portfolio > Manage Reviews
2. Select a resident's Review form. Note: Multiple resident Reviews can be selected by using one of these two methods:
 1. Hold down the Control button while selecting multiple residents
 2. Click and drag to highlight multiple residents
3. In the 'Actions' menu bar, click the 'Lock' icon

B. Resident's Review Form

1. Go to Portfolio > Manage Reviews

2. Click View in front of a resident's Review form
3. Click Lock Form

Important Note: If a completed form is unlocked and the data capture is regenerated, the signatures and comments are deleted.

Configuring Email Notifications for Portfolio Reviews

1. Go to **Portfolio > Notifications**
2. Click the **Reviews** tab
3. By default, boxes are checked for the following email notifications:
 1. Email the subject, reviewers and other commenters when a comment is added to a Review (included in the consolidated email the following day)
 2. Email Review participants when the Review's data is ready. (included in the consolidated email that same day) Note: Emails will not be generated when the data is captured manually or if the review period is in the past.
 3. Include an auto-login link in the email
4. Click **Save**

View and Sign 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.

People to Review

View As: Program Director
Benson, Wayne & ▾

Type Signatures Mtg Date More...

Today ▾ Dec, 2014 Day Week Month Timeline

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	01 Dec	2	3	4	5 12:00 am-Brooks, 12:00 am-Carson, 12:00 am-Gomez, 12:00 am-Malacaria,	6
7	8	9	10	11	12	13

Upcoming Reviews

- Brooks, Maggie - 12/05/2014
- Carson, John - 12/05/2014
- Gomez, Maria - 12/05/2014
- Malacaria, Nancy - 12/05/2014

Pending My Signature

- Brooks, Sharon - 12/31/2012
- Fring, Gustavo - 12/31/2012
- Getti, Sarah - 12/31/2012
- Grimes, Donna - 12/31/2012

Click a Review for more information.

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**.

Create Review Team

Overview

Some institutions conduct Semi-Annual Resident Reviews using a review team rather than designating an individual to conduct the resident's review. If this is the case in your institution, you can configure a review team in the Portfolio Reviews feature. Review teams can then be given full access to reviews. This will permit all members of the team to view the completed review form. They also may generate data and schedule review meetings.

Teams can also be created with designated access to reviews for a subset of residents. This may be beneficial for large core programs where trainees work with a large number of faculty members.

By default, review teams cannot enter comments, however, this can be enabled in the Signatures and Comments settings for the form.

Review team members can be people from any department. However, we recommend that you only include people on the review team who **do not** currently have the role of Program Director, Associate Program Director, or Advisor, because these people can already be included in reviews dynamically.

Create a Review Team

1. Go to *Portfolio > Teams*
2. Click **New**
3. Enter a Team Name
4. Choose one of the following:
 1. All Residents in (program name)
 2. Specific Residents - If this selection is chosen, click **Choose Residents**. Move the designated residents to the right panel and click **OK**.
5. Move your Team Members to the right panel. Choose from all faculty in the department.
6. Click **Save**

Manually Capturing Review Data

You can manually capture review data at any time.

When you do, data is only captured for the resident or fellow's current program.

Capture Review Data


1. Go to **Portfolio > Reviews**
2. Click **View** in front of a resident's scheduled Review
3. Click **Capture Data Now**

Semi-Annual Review

Form Settings | Lock Form | Exit Form

Review Period: 7/1/2015 - 12/31/2015 Residency Period: 7/1/2015 - 12/31/2015 Meeting Date: (TBD)

SEMI-ANNUAL REVIEW

 **Parke, Brenda**
PRG 1
Family Medicine
Advisor: Christopher Carmichael

Report Data was last captured on: 6/8/2016

Capture Data Now (removes existing signatures)

Comments | Signatures | Attach Files

Data Captures Remove Signatures

Signatures are deleted any time data is captured. Both manual and auto capture will remove signatures.

If the data has been captured and signatures collected, BEFORE the end date of the review period, the data will be RE-CAPTURED on the date indicated in the 'reporting tools' section.


Example: In the example below, even though data was captured on 5/25, the Review template still has the auto capture date activated for 5/26. To disable the auto data capture, click 'form settings' link.

Semi-Annual Review

Form Settings | Lock Form | Exit Form

Review Period: 1/1/2016 - 5/30/2016 Residency Period: 7/1/2015 - 5/30/2016 Meeting Date: 5/25/2016 12:00A-1:00A

PD REVIEW

 **Brown, Elise**
FEL1
Pediatric Emergency Medicine

Report Data was last captured on: 5/25/2016
Next data capture scheduled for: 5/26/2016

When data is captured on 5/26/2016, all signatures will be removed. You can modify your [form settings](#) to disable the auto-capture.

Capture Data Now (removes existing signatures)

Comments | Signatures | Attach Files

Compliance per Rotation Review Period

Clicking the form settings link, redirects you to the review form. Uncheck the automatic data capture and Save at the bottom of the form. This action only affects this person's review. All other reviews will continue to have the auto capture option checked.

Reporting Tools



Enhance your form with Reporting Widgets

These mini reports provide performance feedback for quick analysis by capturing a snapshot of the subject's data.

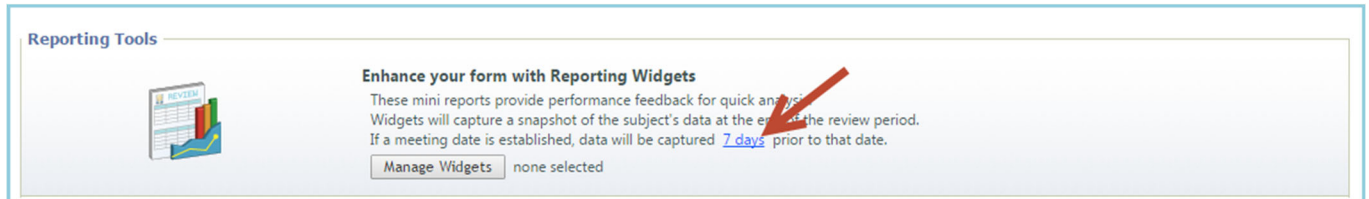
☐ Automatically capture the data at the end of the review period.
If a meeting date is set, data should be captured days prior to that date.

Capturing data manually is permitted at any time

[Manage Widgets](#) 4 selected

Automatically Capturing Review Data

The Review Form Template is designed to capture data about a resident or fellow at the end of a Review Period if no meeting date is scheduled. For example, if the Review Period is 7/1/15 - 12/31/15, the data will be captured on the evening of December 31st. However, if a meeting date is entered, the data will be captured based on the number entered in the Reporting Tools section of the form template.



Note: The review captures data for the trainee's current program.

Meeting Dates & Data Capture

If a meeting date is entered:

- Data will be automatically captured seven days prior to the meeting date. See Change Data Capture Date below to change the default of 7 days.
- Data is captured overnight if the meeting date is less than seven days away.

For example, if you set your Meeting Date for three days from now, but the default is still set at seven days, the data will be captured tonight and will be available tomorrow.

Entering a meeting date in the past:

- Data will have to be captured manually

If no meeting date is entered:

- Data will be captured automatically on the evening of the last day of the Review Period.

For example, if the Review Period is 1/1/14 - 6/30/14, and no meeting date has been entered, the data will be captured on the evening of June 30th.

Change Data Capture Date

Review Form Template

You can change the default setting of 7 days on your form template by following these steps:

1. Go to Portfolio > Form Templates
2. Click Edit
3. In the Reporting Tools section, click 7 days
4. Change the number to when you want the data captured before the review
5. Click Save

Individual Resident's Review Form

If the form template has already been assigned to a resident, you can still change the default of 7 days on the assigned review. Follow these steps to change the data capture date on a single resident's Review form:

1. Go to Portfolio > Reviews
2. Click View in front of a resident's Review
3. Click Form Settings
4. In the Reporting Tools section, click 7 days
5. Change the number
6. Click Save

Manage Reviews

Add meeting dates and times from the Manage Reviews page

1. Go to Portfolio > Reviews > Manage Reviews
2. Find the person in the subject column
3. Enter the meeting date in the Meeting column.
4. Click Save Dates on the tool bar at the top of the page
5. Or click Details and enter the meeting date and time
6. Click Save Meeting Date/Time

Reports

Progress Summary

If you included Progress Summary Indicators on your reviews, you can access this report to get an overview of subjects' progress as scored by reviewers. This list can be limited to show only those subjects whose performance needs attention.

1. Go to **Portfolio > Progress & Usage**
2. Click the **Progress** tab
3. Select your Program and review type (**Advisor**, **Semi-Annual**) filters in the right panel
4. If you want to see reviews from prior years, click **Include All Reviews**
5. Optionally check **Only show people who require attention**
6. Click **Apply Filters**

	Status	Review Type	Form Name	Review Start	Review End	Overall	PC	MK	PBLI	ICS	PRO	SBP
JGB Internal Med												
Brooks, Sharon												
	PRG 3	Semi-Annual	PD Review	7/1/2012	12/31/2012	???	???	???	???	???	???	???
Carson, John												
	PRG 3	Semi-Annual	PD Review	7/1/2012	12/31/2012	???	???	???	???	???	???	???
Collins, Phil												
	PRG 3	Semi-Annual	PD Review	7/1/2012	12/31/2012	???	???	???	???	???	???	???
Duke, Daisy												
	PRG 1	Semi-Annual	Resident Semi-Annual Review	7/1/2012	12/31/2012	???	???	???	???	???	???	???
	PRG 1	Semi-Annual	PD Review	7/1/2012	12/31/2012	???	???	???	???	???	???	???

Progress Usage

The purpose of this report is to give Program and GME level users the ability to check and make sure that the appropriate numbers of Reviews have been scheduled. This report lists current residents in the current academic year that have reviews scheduled.

1. Go to **Portfolio > Progress & Usage**
2. Click the **Usage** tab
3. Select your Program and review type (**Advisor**, **Semi-Annual**) filters in the right panel

4. If you want to see reviews from prior years, click **Include All Reviews**
5. Click **Apply Filters**

Progress		Usage					
Name	Advancement Date	Status	Advisor	Advisor Signed	Semi-Annual	Semi-Annual Signed	
JGB Internal Med							
Brooks, Maggie	7/1/2013	Incoming Resident	0	0	0	0	
Brooks, Sharon	8/1/2013	PRG 3	0	0	1	0	
Brown, Leroy		PRG 3	0	0	0	0	
Carson, John		PRG 3	0	0	1	0	
Collins, Phil	7/1/2013	PRG 3	0	0	1	0	
Duke, Daisy	10/1/2013	PRG 1	0	0	2	0	

Usage Report Filters
[All](#) | [None](#) | [Invert](#) | Programs

- JDK Interventional Cardiology
- JDK OB/GYN
- JDK Radiology Diagnostic
- JGB Internal Med

1 Selected:
☒ Include reviews for current status only
☐ Include all reviews
[Apply Filters](#)

Export

1. From **Portfolio > Progress & Usage > Progress** or **Usage** tabs
2. Look to the bottom right corner
3. Click **Export to Excel** or **Export to PDF**

Progress		Usage											
Status	Review Type	Form Name	Review Start	Review End	Overall	PC	MK	SBP	PBLI	PRO	ICS	OST	
AV Internal Medicine													
Edwards, Aaron													
PRG 1	Semi-Annual	Semi Annual v2	7/1/2020	12/31/2020	???	???	???	???	???	???	???	???	???

Paging On | [Export To Excel](#) | [Export To PDF](#)

Journals Module

Journal Description

Residents are given the opportunity to write self-reflections about their learning experiences. Residents can be assigned specific Journal entries or can be permitted to log journal entries independently.

The Journaling module is a Practice-Based Learning and Improvement tool that gives trainees a place in the software to capture their reflections on individual learning experiences and analyze those experiences by writing about them [see Common Program Requirement IV.A.5c)].

Individuals in your program can use their journals to:

- Identify strengths, deficiencies and limits in their knowledge and expertise
- Systematically analyze their practice and plan changes that will improve their performance
- Use information technology to optimize their learning

Access

The following privilege levels have access to Journals:

- Level 6 - Setup and maintain Journaling module
- Level 5 - Setup and maintain Journaling module
- Level 4 - Log Journal entries; Submit comments
- Level 3 - N/A
- Level 2 - Log Journal entries; Submit comments
- Level 1 - N/A

Access to review and approve Journal entries goes beyond the Security and Privilege levels shown above. Special access must be given to the following key educators. For instructions on how to designate these reviewers, see the *Getting Started > Access* section below.

- **Program Director** - The Program Director must be designated on the program Personnel page.
- **Associate Program Directors** - Associate Program Directors must be designated on the program Personnel page.
- **Advisors** - Advisors must be designated in each resident's Personnel record. Follow the instructions in this Quick Start Guide to add Advisors:

Those individuals who have been designated as reviewers of an assignment will receive an email when an assignment is submitted. If you choose more than one reviewer, they will all receive an email. However, only one of the reviewers needs to indicate his or her approval.

Glossary

Journals - Journals are collections of individual journal entries created by users in the Portfolio module. Anyone who has access to the Portfolio module can create journal entries independently. These journal entries can be kept private so that only the author may access them. Journal entries that are marked as public can be seen by the Program Director, Associate Program Director, Advisor and Program Administrator. These people can also add comments to a journal entry.

Journal Assignments - Administrators can create Journal Assignments for trainees in their program. Assignments provide structure to reflective writing exercises by giving administrators a place to:

- Add instructions
- Distribute assignments
- Identify key educators to review the assignments
- Set due dates

Manage Journal Assignments

Go to *Portfolio > Journals > Assignments*

You can view how people are completing the Assignments you've created on this page. You can also send reminders to complete Assignments, delete a person's Assignment and add an Assignment to someone's list. Just put a check beside a person's name and select an action from the top right of the page.

Use the tabs to sort Assignments by All, Not Submitted, Pending Approval and Approved.

Manage Journal Assignments

Below is a list of Journal Assignments in this department.

AllNot SubmittedPending ApprovalApproved

Delete AssignmentsEmail RemindersNew Assignment

9/1/2016to3/30/2017Ok

Search

	Due Date	Person	Status	Submitted	Reviewers	Approved	
Assignment: 10/1/2016 - Patient Encounter							
<input type="checkbox"/>	10/1/2016	Adams, Betsy Lynn	PRG 1		Program Director	---	
<input type="checkbox"/>	10/1/2016	Arshid, Balal Mounir	PRG 1		Program Director	---	
<input type="checkbox"/>	10/1/2016	Benn, Jason	PRG 2		Program Director	---	
<input type="checkbox"/>	10/1/2016	Christopher, David	Incoming Resident		Program Director	---	
<input type="checkbox"/>	10/1/2016	Douglas, Amy	PRG 1		Program Director	---	
Assignment: 12/1/2016 - M R: M							

Create Journal Assignments

If you would like to use Journaling as a Practice-Based Learning and Improvement tool in your program, you may want to try creating Journaling Assignments. Assignments allow you to give journaling some structure, including Instructions, Due Dates and Sign-off by key educators. You can begin shaping assignments by going to Portfolio and clicking New Journal Assignment.

Create Assignments

1. Go to *Portfolio > Assignments*
2. Click **New Assignment**
3. Journal Entry Title - Enter the name of the assignment that should appear in emails and in trainees' journals. (Required.)
4. Assignment Instructions - Add instructions for completing the assigned journal entry and criteria for a successful entry. (Required)
5. People - Click **Select the people** to choose who will complete this assignment. (Required)
6. Journal Entries & Due Dates - Set a due date for this assignment. (Required)
7. Click **Add another journal entry** to create additional due dates, if necessary.
8. Core Competencies - Click **Practice-Based Learning and Improvement** to open the list of Core Competencies and edit which competencies are relevant to this assignment. Practice-Based Learning and Improvement is checked by default. (Optional)
9. Assignment Approval - This optional step allows you to select who will be responsible for reviewing and approving journal assignments. See the additional notes below for more information.
10. Click **Continue**
11. Confirm each of the people assigned. Uncheck any that should not receive this assignment.
12. Click **Distribute Selected Assignments**

New Journal Assignment

Monthly Reflection

Describe two events that happened this month:

1. An event where you shined! Your knowledge, practice and/or communication skills were used to help a patient and/or their family
2. An event where you felt inadequately prepared to handle the situation. Describe what happened, what you learned and how you'll handle this type of situation differently in the future.

People

Select the people who should complete this assignment.

Journal Entries & Due Dates

One entry is due on

[Add another journal entry](#)

Continue Cancel

Core Competencies

Completing this journal assignment displays competency in [Practice-Based Learning and Improvement](#)

Assignment Approval

Does this assignment need to be approved? If so, select the reviewers.

☐ Advisor

☐ Program Director

☐ Associate Program Director

Assignment is considered approved after only one person approves it.

Why Use Assignment Approval?

You can use the Assignment Approval feature if the Journal Assignments are to be reviewed and approved by key educators in your program, such as:

Program Director - Defined in Program Personnel (Go to Administration > Program > Personnel)

Associate Program Directors - Defined in Program Personnel (Go to Administration > Program > Personnel)

Advisors - Defined in Personnel (Go to Personnel > Personnel Records > Select Resident > Basic Information > Advisor)

Those individuals who have been designated as reviewers of an assignment will receive an email when an assignment is submitted. If you choose more than one reviewer, they will all receive an email. However, only one of the reviewers needs to indicate his or her approval.

Email Notifications

There are several types of email reminders that are sent:

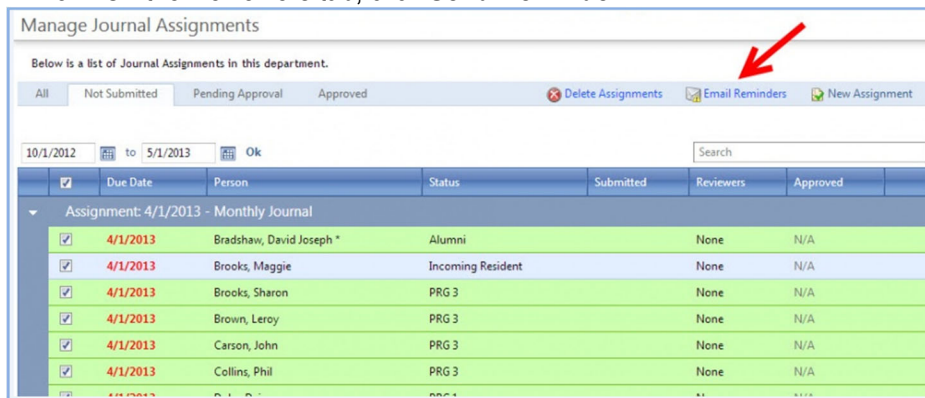
Assigned People: The system automatically sends an email to the assigned people as a reminder to complete their assignments.

Reviewers: The system automatically sends an email to the reviewers when an assignment has been submitted.

Delinquent: The administrator can send additional emails to those who need reminded to complete their tasks.

Configure Notifications

1. Go to *Portfolio > Assignments*
2. Check the box(es) for those who need to be reminded
3. Click **Email Reminder**
4. On the Assigned People tab, click **Send Reminder**
5. On the Reviewers tab, click **Send Reminder**



Manage Journal Assignments

Below is a list of Journal Assignments in this department.

All Not Submitted Pending Approval Approved Delete Assignments Email Reminders New Assignment

10/1/2012 to 5/1/2013 Ok Search

<input checked="" type="checkbox"/>	Due Date	Person	Status	Submitted	Reviewers	Approved
Assignment: 4/1/2013 - Monthly Journal						
<input checked="" type="checkbox"/>	4/1/2013	Bradshaw, David Joseph *	Alumni		None	N/A
<input checked="" type="checkbox"/>	4/1/2013	Brooks, Maggie	Incoming Resident		None	N/A
<input checked="" type="checkbox"/>	4/1/2013	Brooks, Sharon	PRG 3		None	N/A
<input checked="" type="checkbox"/>	4/1/2013	Brown, Leroy	PRG 3		None	N/A
<input checked="" type="checkbox"/>	4/1/2013	Carson, John	PRG 3		None	N/A
<input checked="" type="checkbox"/>	4/1/2013	Collins, Phil	PRG 3		None	N/A

Journals Email Notifications

Administrators can configure email settings so that the software will send immediate emails notifying people when:

- New comments are added to journal entries they are associated with
- New journal assignments are given to them
- New journal entries have been submitted and are ready for them to review, comment on and approve

Email reminders may also be sent when managing assignments to remind people to complete or review and approve assignments.

Automatic Email Notifications

1. Go to *Portfolio > Notifications*
2. Click the **Journals** tab
3. By default, boxes are checked for the following email notifications:
 1. Email the author, reviewers and other commenters when a comment is added to a Journal
 2. Email people when they receive a new Journal Assignment
 3. Email reviewers when a Journal Assignment is submitted that they need to review
 4. Include an auto-login link in the email
4. Click **Save**

Manual Email Reminders

Administrators can send emails to residents reminding them to complete Journal Assignments and to reviewers reminding them to approve Journal entries.

1. Go to *Portfolio > Manage Journals*
2. Click **Manage Assignments**
3. On the 'Not Submitted' tab, check the box in front of an assignment
4. Click **Email Reminders**
5. Click **Assigned People** or **Reviewers** tab
6. Click **Send Reminder**

Log a Journal Entry

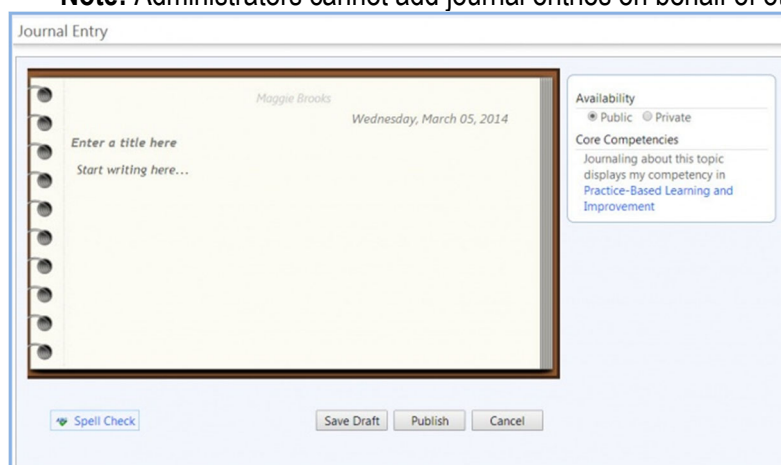
The Journaling module is a Practice-Based Learning and Improvement tool that gives trainees a place in the software to capture their reflections on individual learning experiences and analyze those experiences by writing about them [see Common Program Requirement IV.A.5c)].

Individuals can use their journals to:

- Identify strengths, deficiencies and limits in their knowledge and expertise
- Systematically analyze their practice and plan changes that will improve their performance
- Use information technology to optimize their learning

There are two types of Journal entries that can be entered. One is a freestyle type of journal entry where you can record your thoughts about your experiences at any time. The other type of Journal entry may/may not have been assigned to you by your administrator.

Note: Administrators cannot add journal entries on behalf of others.



The screenshot shows a web-based form titled "Journal Entry". The form has a light blue header bar. Below the header, there is a large text area for writing the journal entry. To the right of the text area, there is a sidebar with settings. At the bottom of the form, there are buttons for "Spell Check", "Save Draft", "Publish", and "Cancel".

Journal Entry

Maggie Brooks Wednesday, March 05, 2014

Enter a title here

Start writing here...

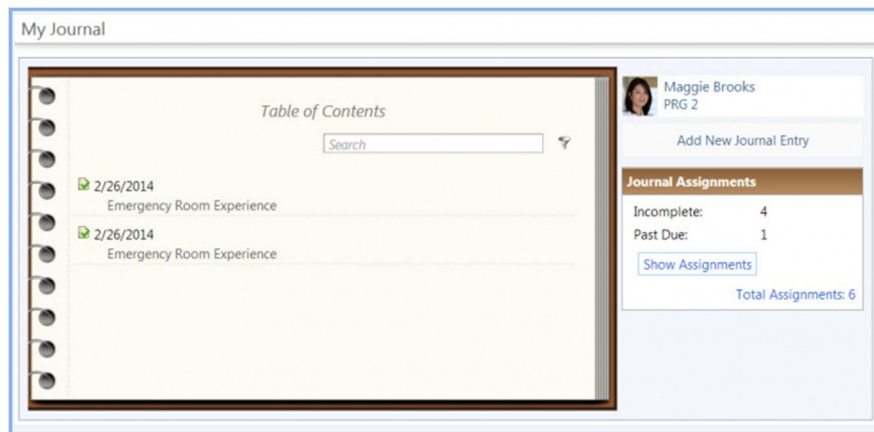
Availability
☒ Public ☐ Private

Core Competencies
Journaling about this topic displays my competency in Practice-Based Learning and Improvement

Spell Check Save Draft Publish Cancel

Independent Journal Entry

1. Go to *Portfolio > Journal*
2. Click **Add New Journal Entry**
3. Enter a title
4. Enter your text here
5. Select one:
 - Public - Can be seen by the author, Program Director, Associate Program Director, Advisor and Program Administration. These people can also add comments to a journal entry.
 - Private - Only visible to the author
6. Click **Practice-Based Learning and Improvement**. The PBLI competency is checked by default. Add any others, if needed.
7. Click **Publish**



Assigned Journal Entry

1. Go to *Portfolio > Journal*
2. Click **Show Assignments**
3. Select an Assignment
4. Enter your text here
5. Click **Publish**

My Journal Assignments		Close
click row to open assignment		
Due Date	Title	Submitted
2/28/2014	Clinic Experience	
3/31/2014	Emergency Room Experience	
3/31/2014	Clinic Experience	
4/30/2014	Clinic Experience	





Manage Journals

Manage Journals By Person

Once people begin completing their journal assignments, you can go to *Portfolio > Manage Journals* to take a high-level look at their journal activities.

You can also see at-a-glance the following information for each Journal:

- Date of latest entry posted
- Number of Assignments
- Number of Assignments not submitted
- Number of Assignments pending approval
- Total number of entries

Journals		Search Author's Name or Status
Journals		
	Benn, Jason PRG 3 Latest Post: Friday, April 13, 2012 3 Assignments: 2 Not Submitted 0 Pending Approval Total Entries: 2	
	Chuku, Melina PRG 3 Latest Post: Thursday, November 15, 2012 1 Assignment: 0 Not Submitted 0 Pending Approval Total Entries: 1	
	DuPuy, Ray PRG 2 Latest Post: Friday, April 13, 2012 3 Assignments: 2 Not Submitted 0 Pending Approval Total Entries: 1	
	Gonzalez, Pedro PRG 3 Latest Post: Thursday, April 19, 2012 1 Assignment: 0 Not Submitted 0 Pending Approval Total Entries: 1	
		Journal Assignments Incomplete: 36 Past Due: 32 New Journal Assignment Manage Assignments

In the Journal Assignments box to the right, you can view how many total journal assignments are incomplete and past due for people in your program. Click **New Journal Assignment** to create additional assignments. Click **Manage Assignments** to go to the Manage Journal Assignments page.

Use the Search box to search for a particular person or to search by status type.

Click on a person's journal to view their Table of Contents. From here, you can see journal entries done independently, assigned or both. Details include the date the journal entry was submitted and the title given to the journal entry.

You can filter the table of contents to only show journaling assignments, independent journal entries or both. (Assignments Journal entries have a paper and check mark icon next to them). You can also use the search feature to find entries containing text you enter into the search box.

In the Journal Assignment box to the right, you will see the total of incomplete and past due journal assignments for this person.

- Click **Show Assignments** to review the person's pending journal assignments.
- Click **Total Assignments** to see a list of all assignments for this person, both pending and submitted.

The screenshot displays a web interface for "Jason Benn's Journal". The main area is titled "Table of Contents" and features three radio buttons for filtering: "Independent", "Assigned", and "Both" (which is selected). A search box is located to the right of these buttons. Below the filters, two journal entries are listed: "4/13/2012 complications" and "4/13/2012 Delivering Bad News", each preceded by a small icon. To the right of the main content, a sidebar shows a profile for "Jason Benn PRG 3" with a dropdown arrow. Below the profile is a section titled "Journal Assignments" containing a table with the following data:

Incomplete:	2
Past Due:	1

Below the table is a "Show Assignments" button and a summary line that reads "Total Assignments: 3".

Delete an Assignment

Administrators can remove an assignment from the Journal module.

1. Go to *Portfolio > Manage Journals*
2. Click **Manage Assignments**
3. Click one of the following tabs: **All, Not Submitted, Pending Approval, or Approved**
4. Check the box in front of an assignment
5. Click **Delete Assignments**
6. Click **OK**

Comments and Approval

Comments

The New Innovations Journaling feature facilitates dialogue between trainees and key educators in your program by offering them the ability to comment on Journal Entries. Commenting gives reviewers the opportunity to provide feedback to authors. Reviewers and authors can continue their conversation about the entry as long as they wish.

Once a Journal Entry, either Assigned or Independent, is published, it is open for comments.

- Authors can comment on their own Journaling Assignments
- Reviewers can comment on Journaling Assignments they are attached to
- Advisors can comment on their Advisees' Assignments or public Independent Journal Entries
- Program Directors, Associate Program Directors and Coordinators can comment on Assigned or public Independent Journal Entries published by any member of their program

Emails will be sent to reviewers, authors and other commentators whenever comments are added to journal entries they are associated with. Authors can see all comments by going to their My Journal page.

Approval

If you would like key educators such as your Program Director, Associate Program Directors, or Advisors to review and approve your Residents' or Fellows' journal entries, you would first need to set up Journaling Assignments and include Reviewers by their role [see Journaling Assignments for more information].

Reviewers will be notified when an Assigned Journal Entry they are attached to has been submitted by the trainee. Reviewers can then log in to the software, go to *Portfolio > Manage Journals* and click the link to access assignments they need to approve. They can then click an individual entry to review.

Once they review the entry, they can add comments in the box provided below the entry. They can also approve the assignment by clicking "Approve Assignment".

By approving the entry, they are agreeing that they believe the content of the entry conforms to the instructions.

The screenshot shows a web interface titled "Journal Entry". The main content area displays a journal entry by Teresa Spino, dated Wednesday, February 23, 2011, titled "Emergency Room Experience". The entry text reads: "12/7/10 - Stab victim - took vitals; calmed patient; stopped bleeding; worked with family members and police." Below the entry is a "Return" button. To the right of the entry is a "Comments" section with a text input field and a "Save Comment" button. Below the "Return" button is a "Comments" section with a text input field and a "Save Comment" button. To the right of the entry is a sidebar with "Assignment Information" (Due Date: 12/31/2010, Submitted On: 2/23/2011 7:47 PM), "Instructions" (Spill your guts!), "Reviewers" (Program Director, Approve Assignment button), and "Core Competencies" (Patient Care, Practice-Based Learning and Improvement). A red arrow points to the "Return" button, and another red arrow points to the "Approve Assignment" button.

Journal Entry

Teresa Spino
Wednesday, February 23, 2011

Emergency Room Experience

12/7/10 - Stab victim - took vitals; calmed patient; stopped bleeding; worked with family members and police.

Modified on Wednesday, February 23, 2011 at 7:47 PM

Return

Comments

There are no comments to display

Remaining Characters: 1,500
Save Comment

Assignment Information

Due Date: 12/31/2010
Submitted On: 2/23/2011 7:47 PM

Instructions

Spill your guts!

Reviewers

Program Director

Approve Assignment

Core Competencies

Journaling about this topic displays my competency in:

- Patient Care
- Practice-Based Learning and Improvement

New Innovations, Inc. ©1995-2013

Feedback

Scholarly Activity Module

For more information about scholarly activity module please go to Help>Tutorial Videos> [13.01] Portfolio>Scholarly Activities

What is scholarly activity tracking in New Innovations

Residents can use Scholarly Activities to record presentations, articles they've authored, publication of original research or review articles in peer reviewed journals, chapters in textbooks; publication or presentation of case reports; clinical series at local, regional, or national professional and scientific society meetings; or participation in national committees or educational organizations.

Various types of forms can be created to document such things as abstracts, grants, publications and poster presentations. Both residents and faculty can document their activities.

Below are some excerpts from ACGME website with regard to scholarly activities, www.acgme.org/

- The ACGME defines Scholarly Activity as *"an opportunity for residents/fellows and faculty to participate in research, as well as organized clinical discussions, rounds, journal clubs, and conferences."*
- Additionally, the ACGME indicates that *"some members of the faculty should also demonstrate scholarship through one or more of the following: peer-reviewed funding; publication of original research or review articles in peer-reviewed journals or chapters in textbooks; publication or presentation of case reports or clinical series at local, regional, or national professional and scientific society meetings; or participation in national committees or educational organizations."*

When scholarly activities are reported to the ACGME Accreditation Data System (ADS), activities must be organized into one of the seven ACGME categories, as shown in the chart below.

ACGME Category	Faculty	Resident
Chapters/Textbooks	✓	✓
Conference Presentations	✓	✓
Grant Leadership	✓	
Leadership or Peer-Review Role	✓	
Other Presentations	✓	
Participated in Research		✓
Teaching/Presentations		✓
Teaching Formal Courses	✓	

Access

ADS Category - Scholarly activity forms are linked to one of the Accreditation Data System (ADS) categories provided by the ACGME. These categories are:

Chapters/Textbooks

- Conference Presentations
- Grant Leadership
- Leadership or Peer-Review Role
- Other Presentations
- Participated in Research
- Teaching/Presentations
- Teaching Formal Courses

Contributors - Users can designate other residents and faculty as contributors on a scholarly activity. Each contributor of the group will receive an email notice to accept the activity which will then add the full details of the activity to their own list of entries.

Scholarly Activity Forms - Scholarly activity forms are templates created by administrators to gather information from residents and faculty about their scholarly activities, such as research, presentations and publications.

How to set up Scholarly Activity Forms

Administrators set up online forms to collect detailed information for each type of activity. New Innovations provides some basic templates which can be customized to meet program preferences for any type of scholarly activity. New forms can also be created to fit your needs.

Administrators can create and design forms that are made available to faculty and residents for the purpose of capturing all the relevant information about their scholarly activities, for example peer-reviewed journal articles and national presentations. Activities logged using these forms can then be tracked by the type of activity, ADS category or by relevant activity dates. When setting up scholarly activity forms, you can create a new form, copy an existing form or use one of our templates. Once the forms are created in each department they can be used by department members and copied to other departments the administrator is privileged in.

Only people whose personnel profile is in the department where the Scholarly Activity form was created can log activities on that form. Faculty and Residents or Fellows from outside departments will not have access to the form.

Create a Form

1. Go to *Portfolio > Forms*
2. Click **New**
3. Select **Create A New Form From Scratch** and then **Create Form**
4. You may also use one of the templated forms. Just select the form and edit any fields or names as needed.

Tabs

Add a field tab

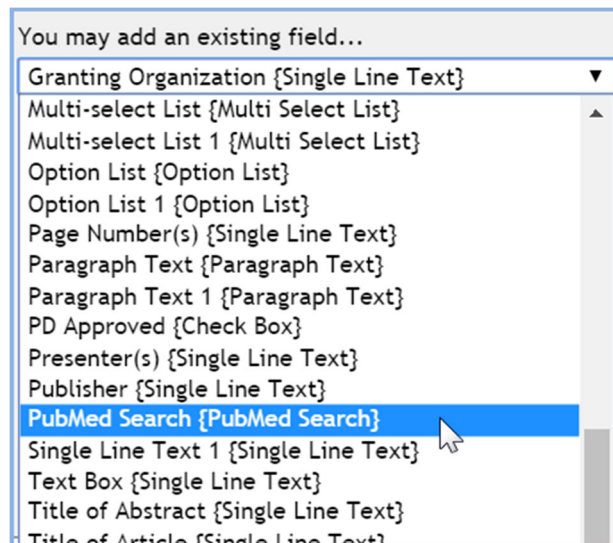
1. Click the section [untitled] to enter the name of the form. You may also use the Form Properties tab to enter the name.
2. An Activity Description field and Activity Date field are provided, by default. These are the fields that will display when Activities are viewed and reports are generated.
3. Add a field

Existing fields. These are suggested fields for your form provided by New Innovations:

Select an existing field from the drop-down list.

1. Make your selection
2. Click Add Field

One of the existing fields is **PubMed Search**. People using this field can search PubMed for articles and attach them to the form.



Create a new field that you can customize. Customize after selecting a field to create the name and options.

1. Select the field type;
2. Click on the customize link
3. Enter a new label
4. If this field is required checking the box
5. Indicate that this field should be used as an Activity or Date description field

The screenshot displays the 'Add a Field' dialog box on the left and the 'Form Properties' tab on the right. The 'Add a Field' dialog has two sections: 'You may add an existing field...' with a dropdown menu showing 'Activity Date' and an 'Add Selected Field' button; and 'or create a new field that you can customize...' with a grid of field types: Single Line Text, Paragraph Text, Check Box (checked), Check Box List, Option List, Multi-select List, Drop Down List, and Date Field. At the bottom are 'Save Form', 'Preview', and 'Cancel' buttons. The 'Form Properties' tab shows a form titled '[untitled]' with four fields: 'Activity Description', 'Author(s)', 'Title of Abstract', and 'Journal'. Each field has a text input, a 'Customize' link, and a 'Required' checkbox. The 'Title of Abstract' field has a key icon next to its 'Required' checkbox.

Form Properties Tab

1. Enter form name and click **Update Name**
2. Activity Description and Activity Date field can be changed or added here
3. Select the ADS Category
4. Select Core Competencies that apply to the activity
5. Check the box below the competency list to give users ability to choose any of the selected competencies. If not checked, the form automatically records all competencies selected.
6. Click **Save Form**

Create a Scholarly Activity Form

Form Customize/Preview

Add a Field Form Properties

Form Name
[untitled] [Update](#)

[Name](#)

Activity Description Field

Activity Description

Activity Date Field

Activity Date

ADS Category
[No Category](#)

To which Core Competencies will this form apply?

[All](#) | [None](#) | [Invert](#)

- ▲ Patient Care
- Medical Knowledge
- ▼ Practice-Based Learning and In
- Interpersonal and Communicat
- Professionalism
- Systems-Based Practice

☐ Allow users to choose from the competencies selected above when logging a Scholarly Activity?

[Save Form](#) [Cancel](#)

[untitled]

Activity Description [Customize](#)

PubMed Search [Customize](#)

Activity Date [Customize](#)

[Preview Form](#)

Email Notifications

Administrators can configure email notifications for Scholarly Activity Forms.

1. Go to *Portfolio > Notifications*
2. Click the **Scholarly Activity** tab
3. Check the boxes for the following email notifications:
 - Email people when they are added as contributors to Scholarly Activities
 - Include an auto-login link in the email
4. If you have privileges in multiple Departments, check the box to apply these settings to other Departments
5. Click **Save**

Notification Setup

Reviews
Scholarly Activity
Journals

☐ Email people when they are added as Contributors to Scholarly Activities.

Email Message:
You have been included as a contributor on [Activity Owner's Name]'s [Activity Description] Scholarly Activity.

☐ Include auto-login link in all Portfolio emails?
☐ I want to apply the above settings to other departments.

Save

Manage Activities

Activity logs can be edited or deleted by using the links to the left of the entry. Click the Activity link to view the log.

To View Logged Activities

1. Go to Portfolio>Scholarly Activities
2. Click on Manage Activities
3. At the top of the page you can select an individual or leave **the default or all people**
4. Click either edit or delete to manage the activity

Manage Activities for
All People
Show Archived/Legacy People

Show Archived

		Person	Activity	Date	Form Name	Logged By	Logged On	Last Updated By	Last Updated On
New									
Edit	Delete	Mullen, Allie	Peer Reviewed Research Article/Project	7/14/2017	Peer Reviewed Research Article/Project	Allie Mullen	7/14/2017 10:22 AM	Allie Mullen	7/14/2016
Edit	Delete	Mullen, Allie	Five Types of Headaches and Their Treatment	7/10/2016	Abstracts	Allie Mullen	7/14/2017 10:23 AM	Allie Mullen	7/14/2016
Edit	Delete	Douglas, Amy	National Presentation/Poster	8/21/2014	National Presentation/Poster	Amy Douglas	9/2/2017 1:36 PM	Amy Douglas	9/2/2014
Edit	Delete	Dalvario, Angela	Trauma and First Aid	7/8/2016	Abstracts	Angela Dalvario	7/14/2017 10:12 AM	Angela Dalvario	7/14/2016
Edit	Delete	Dalvario, Angela	Wound Care	6/16/2016	Procedure/Patient Notes	Angela Dalvario	7/14/2017 10:12 AM	Angela Dalvario	7/14/2016
Edit	Delete	Bach, Ann	Post-Traumatic Stress Disorder	7/9/2016	Abstracts	Ann Bach	7/14/2017 10:07 AM	Ann Bach	7/14/2016

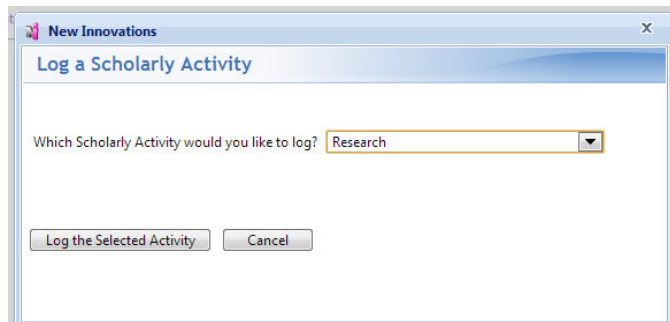
How to Log Scholarly Activities

Once a form is created, residents and faculty can log scholarly activities and achievements. They can select an appropriate form from the list of available forms and fill in the blanks. After activity forms are submitted, the details of each entry, including any uploaded documents, are recorded in the database.

Each user can then review the history of their logged entries as well as those activities that they have been associated to as a contributor.

Log an Activity:

1. Go to Portfolio > Scholarly Activity
2. Click New
3. Select the type of Activity you wish to log
4. Click Log the Selected Activity
5. Complete the entries
6. Click Save



PubMed

If you have a field for adding PubMed search you can cite a resource in your log

1. Enter the Activity Description and date
2. Click the PubMed link
3. Enter a key word such as a title, the author's name
4. Click Search
5. Find the article to cite
6. Click the article link to read
7. Click Select to attach the article to your log

* Activity Description	Review Article
* Activity Date	10/4/2016 
PubMed Search	PubMed 

Adding Contributors

The contributor feature gives users the ability to log a scholarly activity and invite others in as collaborators. Once a user becomes a contributor, he or she can fully access that scholarly activity log. Contributors and authors of a particular scholarly activity can then access and share information in one place. When someone logs a scholarly activity, he or she can pick contributors from a list of all department members or

search for people from other departments. Follow the steps above and add contributors before saving your log.

Contributor Notifications

If a user has been designated as a contributor to a Scholarly Activity, he or she will receive a notification on their Home Page. Alternatively, users can select Portfolio > Activity Contributions from the menu bar to view pending contributions.

- Click View to review pending contributions.
- Click the Accept or Refuse radio button, then click Save.

When a user accepts a scholarly contributor role they will have the details of the activity added to their list of entries.

When a user refuses an activity the confirmation simply is removed from the user's notification list.

Further contributor solicitations can be directed toward the user regarding the same material regardless of previous refusals.

Edit/Delete Scholarly Activities

- Users can view, modify or delete existing scholarly activity entries by accessing the Portfolio > Scholarly Activity menu and clicking Edit or Delete next to the appropriate activity.
- Entries cannot be archived.
- Designated contributors may only delete an entry and would need to request further modifications from the user who originally logged the activity.

Add ADS Categories

You may have Scholarly Activity forms that have not been linked to one of the ADS Categories. When you link your forms to an ADS Category, information will be readily available on the ADS Category report. This will streamline your efforts for inputting data in the ACGME ADS site.










1. Go to *Portfolio > Forms*
2. In the ADS Category column, click the header in the drop-down list: **No Category**
3. Select one of the ADS Categories
4. Selections are automatically saved
5. Repeat the above process until all Scholarly Activity forms have an ADS Category.

Scholarly Activity Forms					
New		<input type="checkbox"/> Archived <input type="button" value="Edit Activity Identifiers"/> <input type="button" value="Archive Forms"/>			
	Name	ADS Category	Activity Description Field	Activity Date Field	Created On
	Abstracts	Chapters / Textbooks	Abstracts (Form Name)	Activity Logged Date	03/18/2016
	Faculty-Grants	Faculty Resident	Faculty-Grants (Form Name)	Activity Logged Date	03/18/2016
	Honors and Awards	Faculty Resident	Honors and Awards (Form Name)	Activity Logged Date	03/18/2016
	National Presentations-CME	Faculty Resident	National Presentations-CME (Form Name)	Activity Logged Date	03/18/2016
	Peer Reviewed Journals	Faculty Resident	Peer Reviewed Journals (Form Name)	Activity Logged Date	03/18/2016
	Presentations	Conference Presentations	Presentations (Form Name)	Activity Logged Date	06/01/2016

Add a Second Category

Some categories are for both residents and faculty, so nothing further needs to be done after selecting the categories. But if a category is typically just for faculty, the coordinator has the option to add a second category showing that the form is also being used for the resident. For example, the form may be for faculty members who have acquired a grant. This would be a faculty only activity. However, a resident may perform some research in conjunction with that grant, so a second category can be added to the same form for the resident research. This will allow one form to have two categories: one for residents and one for faculty.







1. Click the small arrow beside the category
2. Select one of the following:
 1. **Add Resident Category**
 2. **Add Faculty Category**
3. Select the appropriate category
4. Selections are automatically saved

Scholarly Activity Forms					
New		<input type="checkbox"/> Archived <input type="button" value="Edit Activity Identifiers"/> <input type="button" value="Archive Forms"/>			
	Name	ADS Category	Activity Description Field	Activity Date Field	Created On
  	Abstracts	Faculty Chapters / Textbooks Resident Other Presentations	Abstracts (Form Name)	Activity Logged Date	03/18/2016
  	Faculty-Grants	Faculty Grant Leadership Resident Participated in Research	Faculty-Grants (Form Name)	Activity Logged Date	03/18/2016
  	Honors and Awards	Faculty Conference Presentations Resident Chapters / Textbooks	Honors and Awards (Form Name)	Activity Logged Date	03/18/2016

Edit, Copy and Delete Scholarly Activity Forms

Scholarly Activity forms that have **not** been used by your residents or faculty can be edited or deleted. This preserves the integrity of the data collected on the form. However, if changes need to be made to an existing form, make a copy of the form, edit the copy and archive the original form. All forms can be copied regardless if they have been used or not.

Use the icons to perform these actions.

Scholarly Activity Forms					
New		<input type="checkbox"/> Archived <input type="button" value="Edit Activity Identifiers"/> <input type="button" value="Archive Forms"/>			
  	Abstracts	Chapters / Textbooks	Abstracts (Form Name)	Activity Logged Date	03/18/2016
  	Faculty-Grants	Faculty Grant Leadership Resident Participated in Research	Faculty-Grants (Form Name)	Activity Logged Date	03/18/2016

Edit a Scholarly Activity Form

1. Go to *Portfolio > Forms*
2. Click the **Pencil** icon
3. Make your changes to the form
4. Click **Save Form**

Copy a Scholarly Activity Form

1. Go to *Portfolio > Forms*
2. Click the **Copy** icon
3. Select the Department you would like to copy the form to
4. Click **Copy Form**

Delete a Scholarly Activity Form

1. Go to *Portfolio > Forms*
2. Click the **Delete** icon

Archive/Unarchive Scholarly Activity Forms

Archive a Form

You can archive scholarly activity forms that are no longer in use.

1. Go to *Portfolio > Scholarly Activity > Forms*
2. Click **Archive Forms** in the top right corner
3. Check the box for the form you would like to archive
4. Click **Save**

Form Name	Archived
Faculty-Grants	<input type="checkbox"/>
Honors and Awards	<input type="checkbox"/>
National Presentations-CME	<input type="checkbox"/>
Peer Reviewed Journals	<input type="checkbox"/>
Presentations	<input type="checkbox"/>
Procedure/Patient Notes	<input type="checkbox"/>
Survey	<input type="checkbox"/>

Save Cancel

Unarchive a Form

1. Go to *Portfolio > Scholarly Activity > Forms*
2. Click **Archive Forms**
3. Uncheck the box for the form you would like to unarchive
4. Click **Save**

Scholarly Activity Reports

Activities Report

This report will allow you to view activities for individual people and activities.

Generate the Activities Report

1. Go to Portfolio>Scholarly Activities>Activities Reports
2. Click on Activities tab
3. Select the people and activities you want to display
4. Select the date range or academic year
5. Indicate whether you want your results by individual or continuous
6. Click view activities

Totals by Competency Report

This report will report on activities by core competency

Generate the Totals by Competency Report

1. Go to Portfolio>Scholarly Activities>Activities Reports
2. Click on Totals by Competency
3. Select your date range or academic year
4. Select your people
5. Select your core competencies
6. Click generate report

Totals by Activity Report

This report will report on people and the activities they have logged.

Generate the Totals by Activity Report

1. Go to Portfolio>Scholarly Activities>Activities Reports
2. Click on Totals by Activity Tab
3. Select your date range or academic year
4. Select the people
5. Select the activities
6. Click generate report

ADS Categories Report

This is the report coordinators will generate when they need to input data into the ADS link. It will display a summary of the number of items completed in each of the ACGME ADS categories.

Generate the ADS Report

1. Go to Portfolio > Scholarly Activity>Activity Reports
2. Click the ADS Categories tab
3. Select a date range and program
4. Select Core Faculty or Residents
5. Click Generate Report

Faculty	PubMed IDs	Other Publications	Conference Presentations	Other Presentations	Chapters / Textbooks	Grant Leadership	Leadership or Peer-Review Role	Teaching Formal Courses
James, Smith		0	0	0	0	0	N	N
Su, Nick		0	0	0	0	0	N	N
Three, Nicktest		2	0	0	0	0	N	N

Export To Excel | Export To PDF

Trouble-shooting

- If your faculty are not appearing on the report, be sure you have designated your Core Faculty in the Program information pages. Go to Administration > Program > Personnel. Click the Faculty tab. Click Designate Faculty to add your faculty members.
- The report only shows activities from the faculty appointment date forward. Add an appointment date in the faculty member's Personnel file or in Administration > Program > Personnel > Faculty tab.
- If the scholarly activities are not appearing on the ADS Report, check to be sure that your Scholarly Activity forms have been linked with one of the seven ADS categories.