

2026

New Innovations (RMS)
Scholarly Activity Training



Table of Contents

What is Scholarly Activity tracking in New Innovations	4
Access.....	6
How to set up Scholarly Activity Forms.....	7
Create a Form	8
Tabs.....	8
Add a field tab.....	8
Existing fields.....	8
Create a new field that you can customize	9
Form Properties Tab.....	10
Email Notifications.....	11
How to Log Scholarly Activities	12
Log an Activity:	12
PubMed.....	12
Adding Contributors.....	13
Contributor Notifications	13
Manage Activities	14
To View Logged Activities.....	14
Edit/Delete Scholarly Activities	15
Add ADS Categories	15
Add a Second Category.....	16
Edit, Copy and Delete Scholarly Activity Forms	17
Edit a Scholarly Activity Form	17
Copy a Scholarly Activity Form.....	17
Delete a Scholarly Activity Form	17
Archive/Unarchive Scholarly Activity Forms.....	18
Archive a Form.....	18
Unarchive a Form	18
Scholarly Activity Reports.....	19
Activities Report	19
Generate the Activities Report.....	19

Totals by Competency Report.....19
 Generate the Totals by Competency Report19
Totals by Activity Report.....20
 Generate the Totals by Activity Report.....20
ADS Categories Report20
 Generate the ADS Report20
Trouble-shooting Reports.....20

What is Scholarly Activity tracking in New Innovations

Trainees 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

For more information on creating and managing assignments [13:01] Portfolio-Scholarly Activity

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

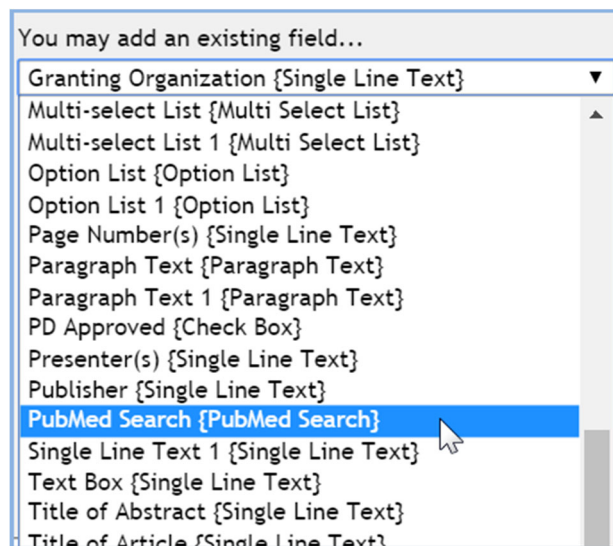
1. Click the section [untitled] to enter the name of the form. You may also use the Form Properties tab to enter the name.
2. An Activity Description field and Activity Date field are provided, by default. These are the fields that will display when Activities are viewed and reports are generated.
3. 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, check the box
5. Indicate that this field should be used as an Activity or Date description field

The screenshot displays a form builder interface. On the left, a panel titled "Add a Field" and "Form Properties" offers two options: "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. Below this panel are "Save Form", "Preview", and "Cancel" buttons. On the right, a preview window titled "[untitled]" shows a form with four fields: "Activity Description" (with a green checkmark icon), "Author(s)", "Title of Abstract" (with a green checkmark and a key icon), and "Journal". Each field has a "Customize" link and a gear icon.

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


[untitled]

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 Interpersonal and Communicat
Professionalism
Systems-Based Practice


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

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

[Preview Form](#)

Activity Description 

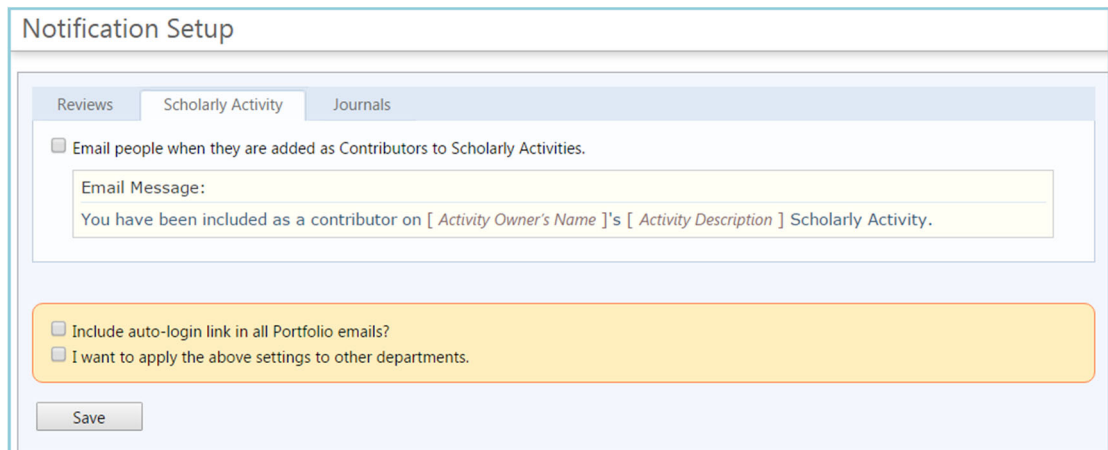
PubMed Search  [Customize](#)

Activity Date  [Customize](#)

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**



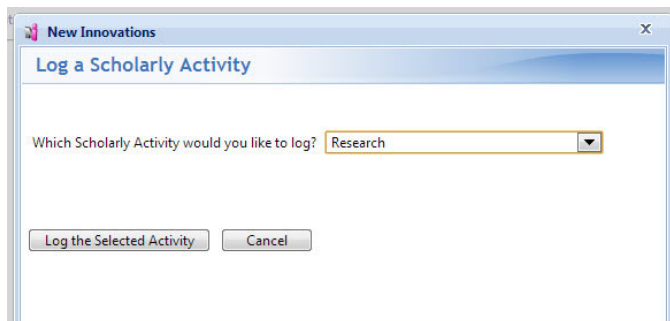
The screenshot shows a web interface titled "Notification Setup". At the top, there are three tabs: "Reviews", "Scholarly Activity" (which is selected), and "Journals". Below the tabs, there is a section with a checkbox labeled "Email people when they are added as Contributors to Scholarly Activities." which is checked. Underneath this checkbox is a text area for the "Email Message:" containing the text: "You have been included as a contributor on [Activity Owner's Name]'s [Activity Description] Scholarly Activity." Below this section, there is a yellow highlighted area containing two more checkboxes: "Include auto-login link in all Portfolio emails?" and "I want to apply the above settings to other departments.", both of which are checked. At the bottom left of the form is a "Save" button.

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



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.

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 for all people**
4. Click either edit or delete to manage the activity

Manage Activities for [Show Archived/Legacy People](#)

[Show Archived](#)

New		Scholarly Activities							
		Person	Activity	Date	Form Name	Logged By	Logged On	Last Updated By	Last Updated On
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

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.

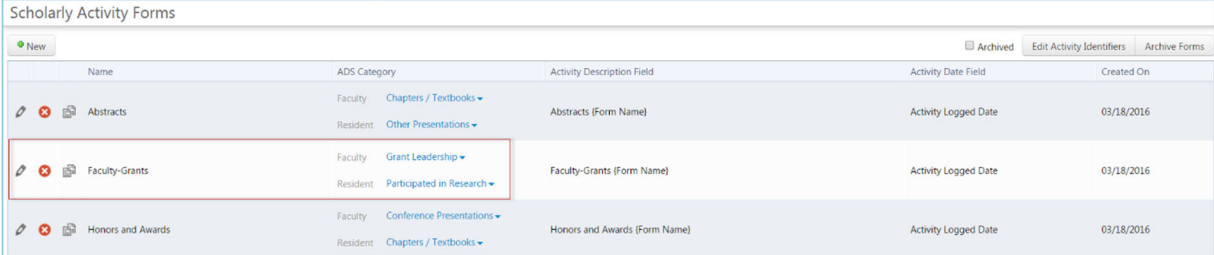
1. Go to **Portfolio > Forms**
2. In the ADS Category column, click the header in the drop-down list: **No Category**
3. Select one of the ADS Categories
4. Selections are automatically saved
5. Repeat the above process until all Scholarly Activity forms have an ADS Category.

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



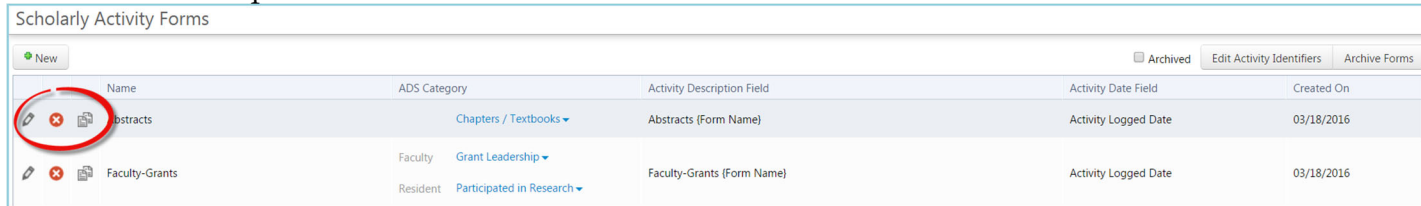
Scholarly Activity Forms					
New Archived Edit Activity Identifiers Archive Forms					
Name	ADS Category	Activity Description Field	Activity Date Field	Created On	
Abstracts	Faculty Chapters / Textbooks Resident Other Presentations	Abstracts (Form Name)	Activity Logged Date	03/18/2016	
Faculty-Grants	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.



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 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 > Scholarly Activity>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 > Scholarly Activity>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 > Scholarly Activity>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 Reports

- 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.