New Innovations (RMS) Portfolio Module
(Portfolio Reviews)

MMCGME
Metro MN Council on Graduate Medical Education

2026

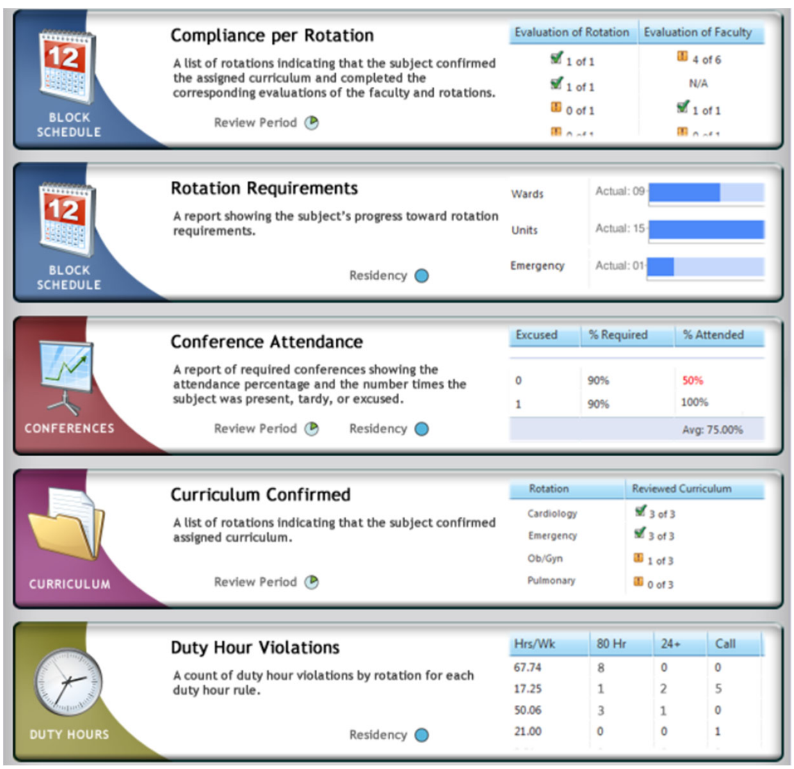
Table of Contents

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

For more information about Portfolio Reviews go to [13:03] Prepare the software for 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

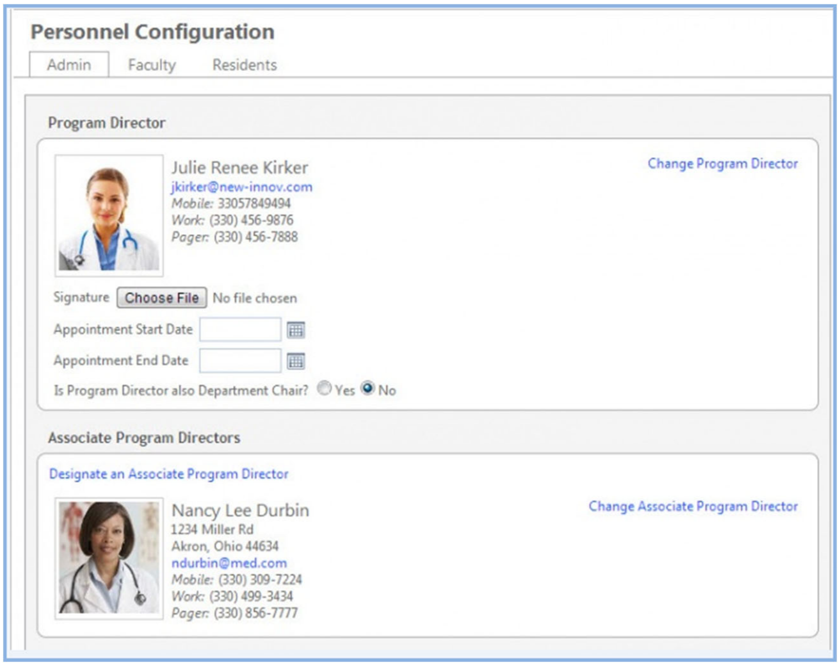
Be sure that each resident and fellow has a Training Record in their Personnel Record.

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.

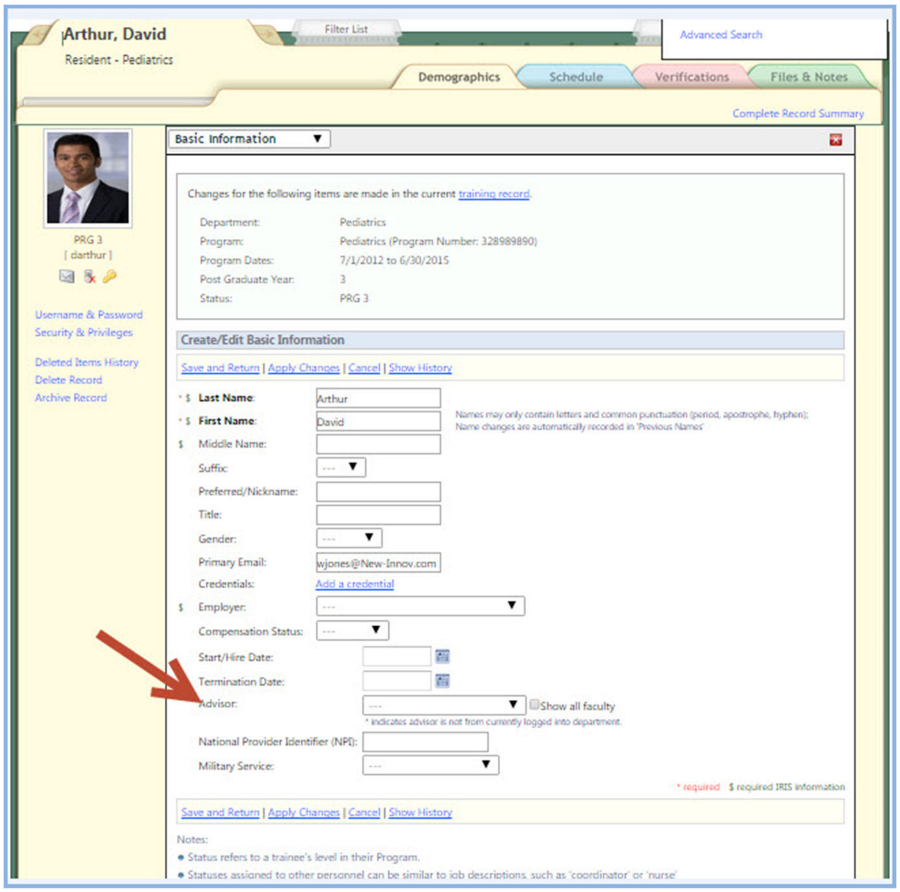
1. **Go to Administration> Programs > Personnel**
2. Click **Designate a Program Director** or **Designate an Associate Program Director**
3. Select the correct person
4. Click **Save**


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
Nancy Lee Durbin
1234 Miller Rd
Akron, Ohio 44634
ndurbin@med.com
Mobile: (330) 309-7224
Work: (330) 499-3434
Pager: (330) 856-7777
Change Associate Program Director

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**



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	*Administration > Program > Configuration*
Administration	Check the Advancement Date for your program	*Administration > Program > Configuration*
Administration	Specify the Program Director and Associate Program Director in Program Personnel	*Administration > Program > Personnel > Admin tab*
Personnel	Enter all resident and fellow profiles	*Personnel > Add New Person* or *Personnel > Tools > Import ERAS Data*
Personnel	Make sure residents have an accurate training record	*Personnel > Personnel Records > Training Record*
Personnel	Assign Advisor to residents and fellows	*Personnel > Personnel Records > Basic Information > Advisor*
Personnel	Enter Certifications	*Personnel > Personnel Records > Certifications*
Personnel	Enter State Licenses	*Personnel > Personnel Records > Licenses*
Personnel	Enter Test scores	*Personnel > Personnel Records > Test Scores*
Schedules	Check that rotations, status type and program are correct in the resident and fellow block schedules	*Schedules > Schedule Rotations > Select Resident*
Schedules	Configure Rotation Requirements	*Schedules > Block Scheduling > Setup > Rotation Requirements*
Schedules	Upload and assign curriculum for rotations	*Schedules > Curriculum > New or Edit Existing*

Module	Task	Path
Schedules	Check to see that the assignment definition for Continuity Clinics is marked is a Continuity Clinic	*Schedules > Scheduling Assignment > Setup > Assignment Definitions*
Schedules	Assign residents to the continuity clinic	*Personnel > Personnel Records > Continuity Clinic Schedules > Assignment Scheduling > Add Continuity Clinic*
Conferences	Create Conferences	*Conferences > Manage Conferences > Add*
Conferences	Take Attendance	*Conferences > Configuration & Defaults > Conferences > Record Attendance*
Work Hours	Configure Work Hour module	*Work Hours > Setup > Basic Configuration Work Hours > Setup > Rule Configuration*
Work Hours	Make sure that resident and fellow work hours have been checked by the work hours rules	*Work Hours > My Work Hours > View Hours*
Evaluations	Confirm that Core Competencies are linked with Categories used on the resident evaluation form	*Evaluations > Evaluation Forms > Categories*
Evaluations	Create sessions for Resident Evaluation of Faculty, Faculty Evaluation of Resident, and Resident Evaluation of Rotation	*Evaluations > Sessions > Add New Session*
Procedure Logger	Configure Procedure Logger module	*Logger > Configuration > General, Privileging and Fields tabs*
Procedure Logger	Enter Roles and establish targets for Procedures	*Logger > Lists & Fields > Procedures tab & Roles tab*
Procedure Logger	Check that procedure logs have been confirmed by a supervisor	*Logger > Confirm Procedures*
Portfolio	Check that Core Competencies are assigned to Scholarly Activity forms	*Portfolio > Scholarly Activity > Forms*

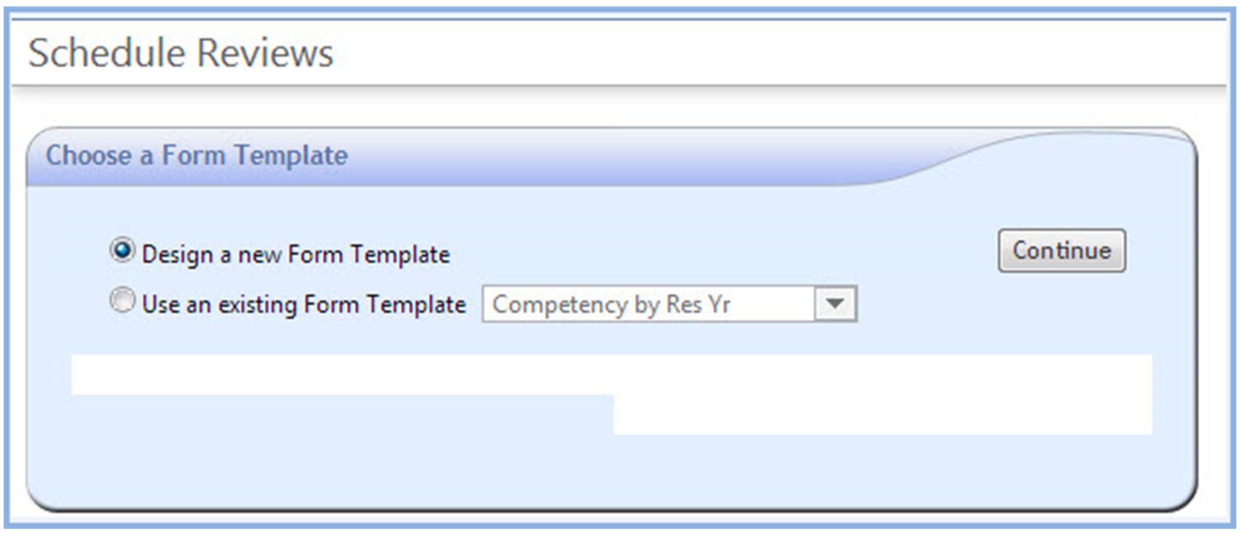
Module	Task	Path
Portfolio	Enter scores on Milestone Reviews	*Portfolio > Milestones*

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

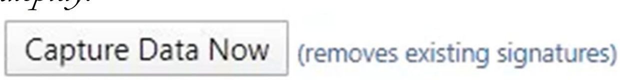
For more information about Portfolio Reviews go to [13:04] Create a Review.

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:



Checked (not recommended):

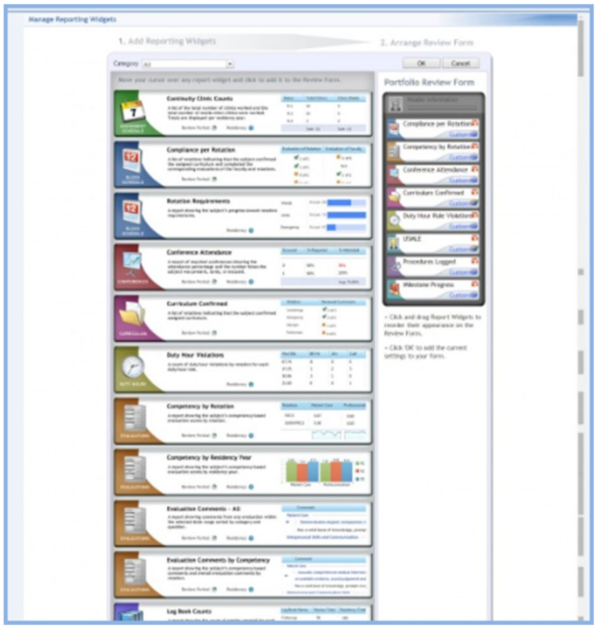
- Your form pulls in data on its own
  - You (or any reviewer with Full Access, see Access below) can still click **Capture Data Now** to pull in data before a review

        - 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 trainee data to reviewers

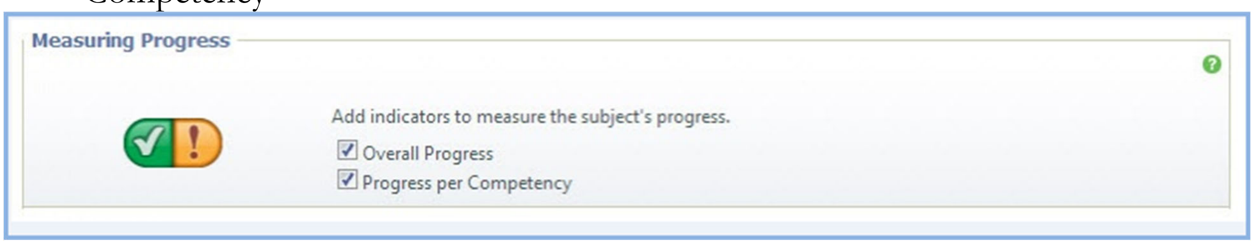
1. Click on the **Manage Widgets** button to select the data that will be presented during the review

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

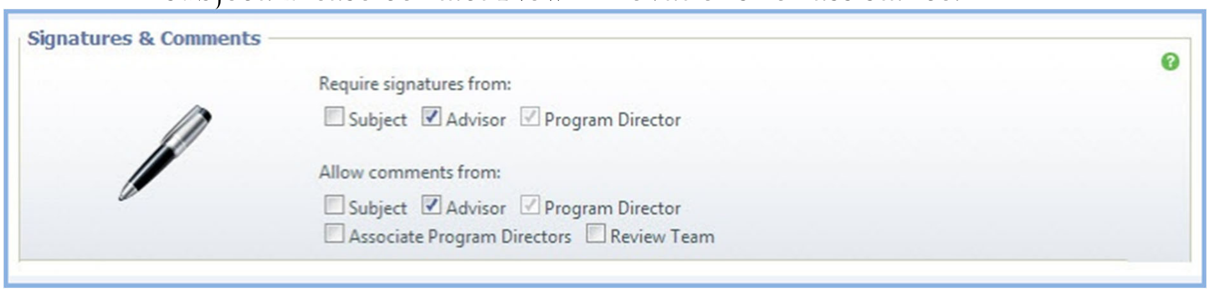
1. Check Overall Progress to provide one indicator of general progress
2. Check Progress per Competency to provide an indicator of each Core Competency



Require additional signatures & enable additional commentators

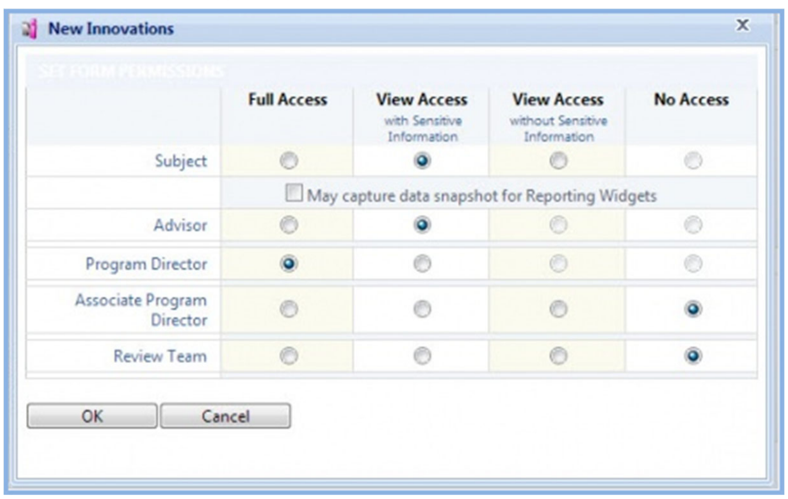
1. Select who should sign the form
   - Advisor is automatically selected if the form type is Advisor
   - Program Director is automatically selected if the form type is Semi-Annual
2. Select who should be permitted to enter comments
   - Advisor is automatically selected if the form type is Advisor
   - 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.



Set who can see what in Access

1. Click Set Permissions
2. 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.
3. Give **Full Access** to anyone you want to be able to manually populate the form with widget data
4. Make any other selections
5. Click **OK** to save Permissions



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 trainees 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

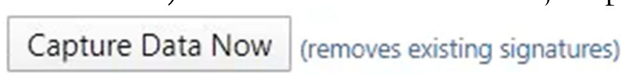
1. Click **View** to see any review form
2. If you see needed edits, delete all the reviews you just created
3. Edit the template

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



Managing Scheduled Reviews

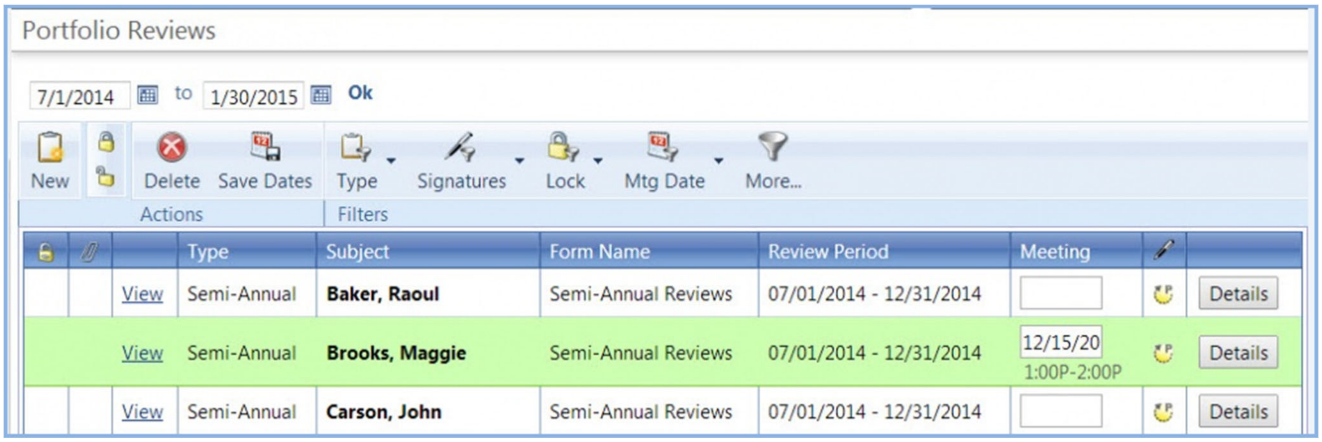
For more information about Portfolio Reviews go to [13:05] Manage Reviews

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 trainee's Review, the Review will open allowing you to take these additional actions:

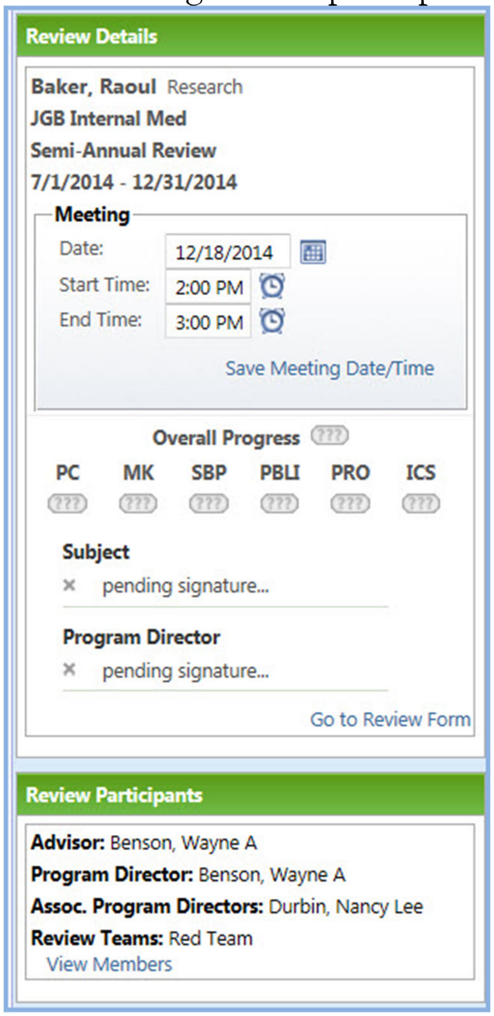
- Edit the configuration of the review form
- Capture data immediately
- Sign the review form
- Add comments
- Adjust the progress indicators
- Attach files
- Print the form
- Create a PDF file of the form



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:

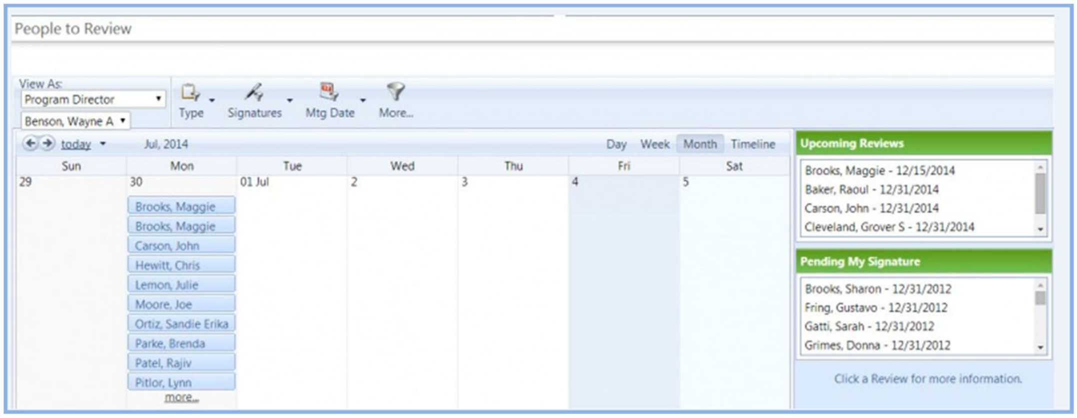
- Scheduling the meeting time
- Signing the review or marking it as having a signature on file
- Viewing the review form
- Viewing a list of participants in the review



View Reviews on Calendar

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

1. **Go to Portfolio > People to Review**

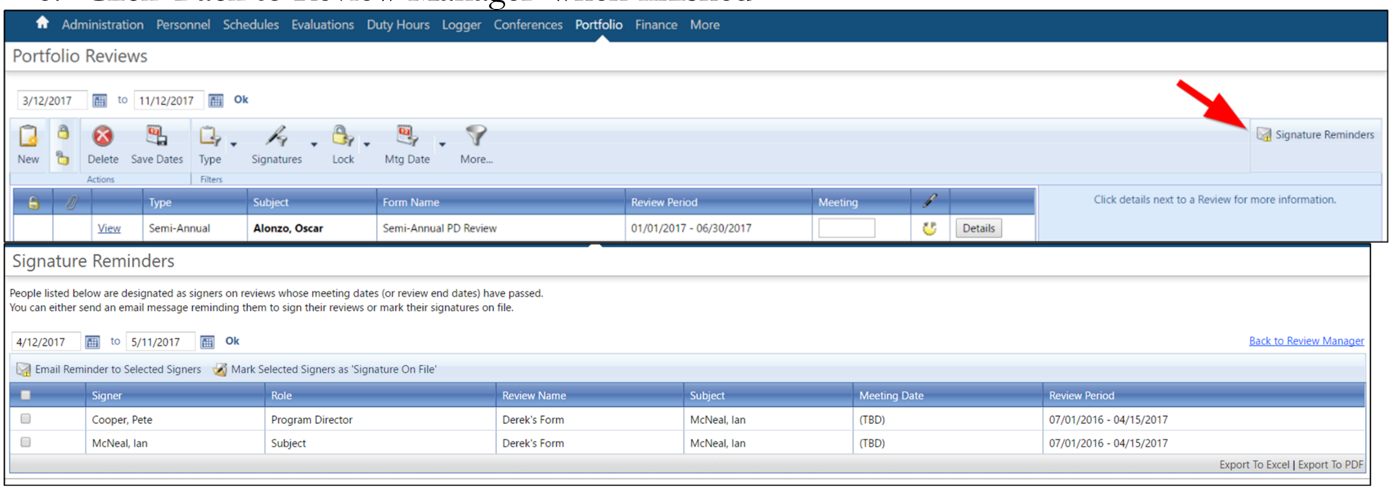


- Reviews will appear on the Calendar according to whether or not they have a Meeting Date scheduled:
- Reviews with a Meeting Date will appear on the calendar on the Meeting Date.
- Reviews with no Meeting Date specified will appear on the calendar on the last day of the Review Period.
- Meeting dates 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



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:

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:
    a. Hold down the Control button while selecting multiple residents
    b. Click and drag to highlight multiple residents
3. In the 'Actions' menu bar, click the 'Lock' icon

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.

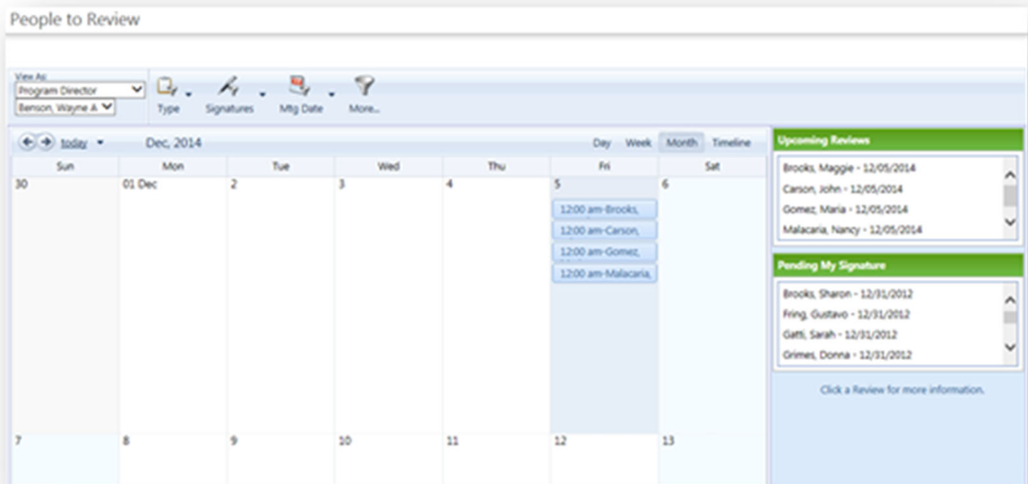
Configuring Email Notifications for Portfolio Reviews

For more information about Portfolio Reviews go to [13:06] Notification Options

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.



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.

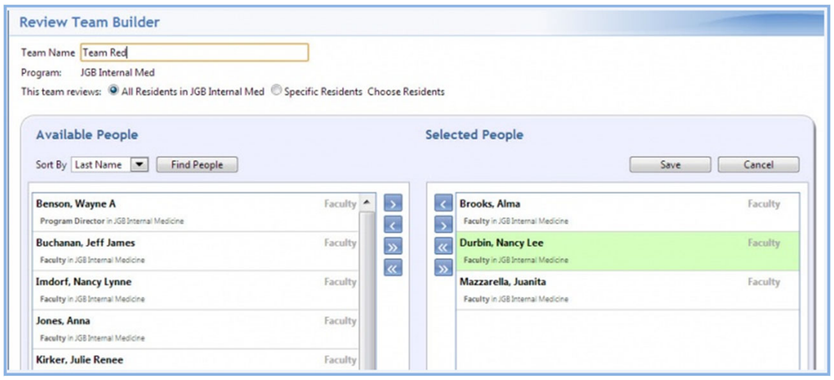
Teams can also be created with designated access to reviews for a subset of residents. This may be beneficial for large core programs where trainees work with a large number of faculty members.

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**

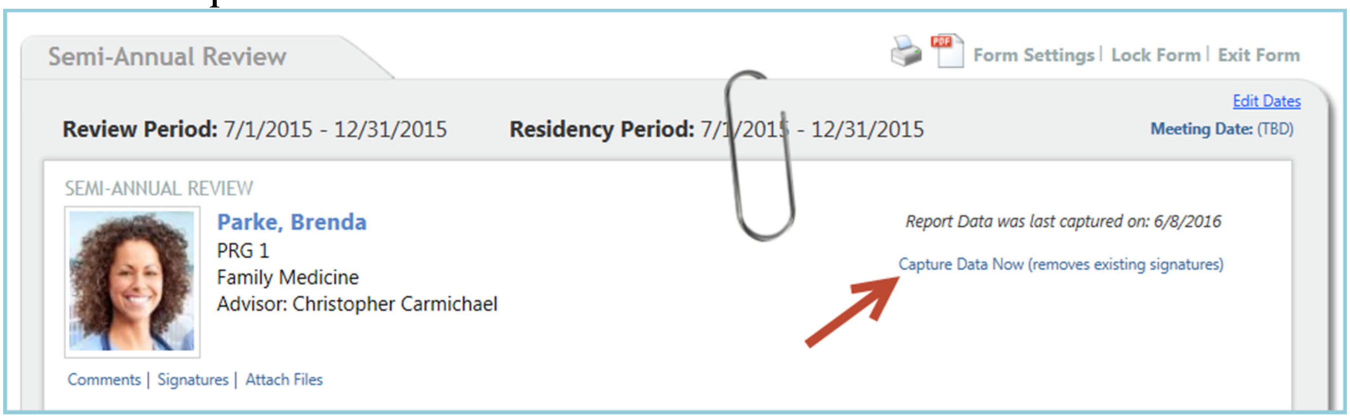


Manually Capturing Review Data

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**

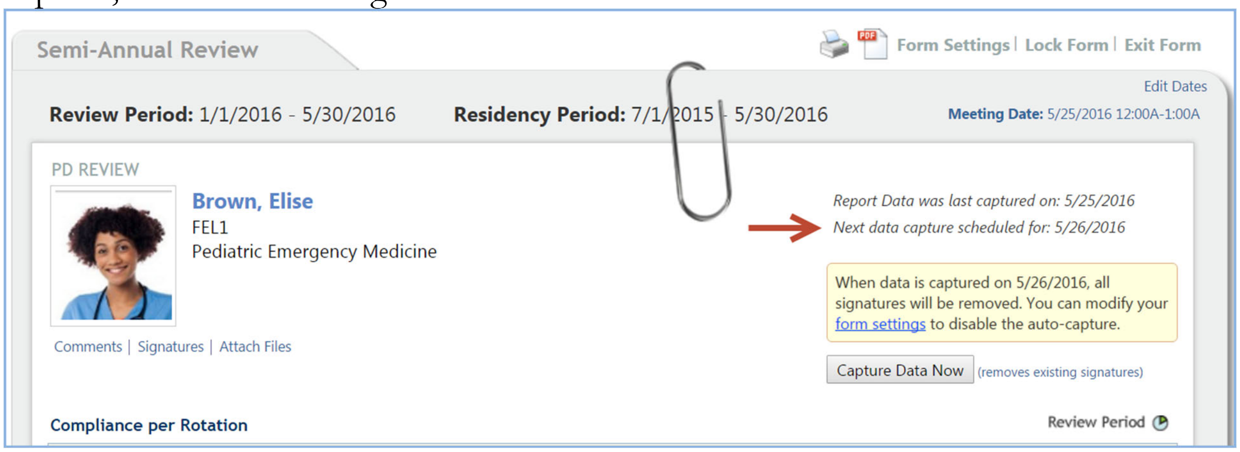


Data Captures Remove Signatures

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.

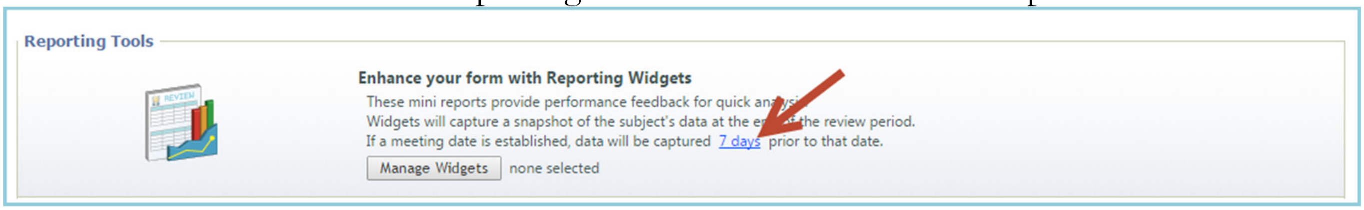
Example: In the example below, even though data was captured on 5/25, the Review template still has the auto capture date activated for 5/26. To disable the auto data capture, click 'form settings' link.



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.

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 7/1/26- 12/31/26, 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 1/1/26- 6/30/26, 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

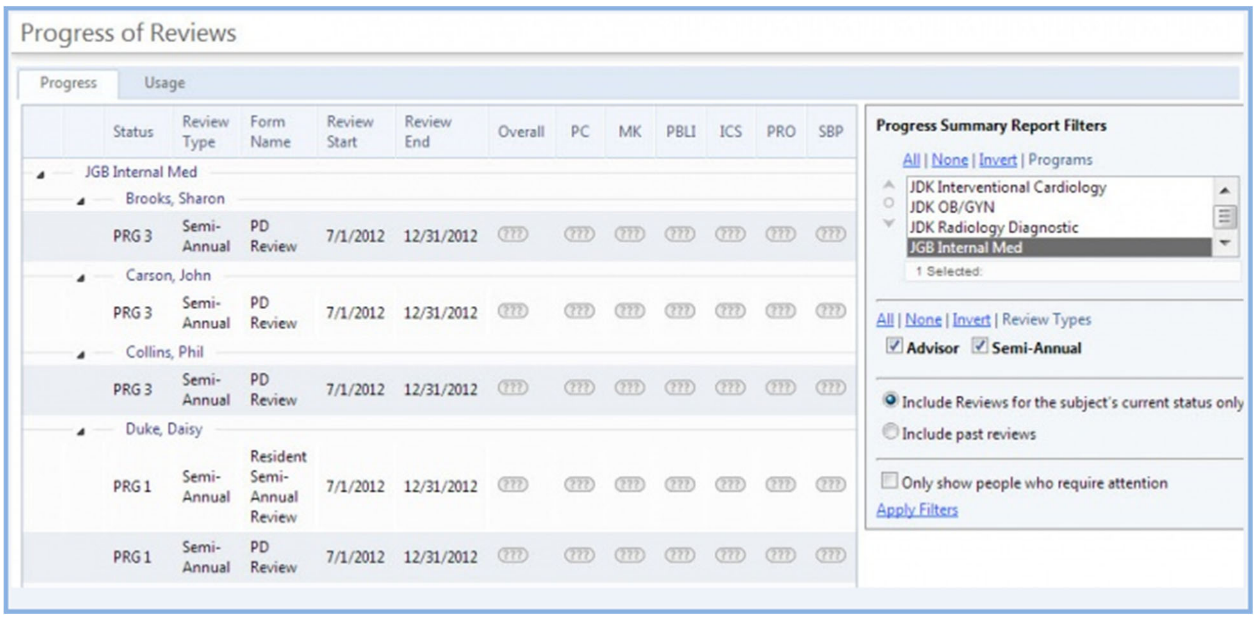
1. Go to Portfolio > Reviews > Manage Reviews
2. Find the person in the subject column
3. Enter the meeting date in the Meeting column.
4. Click Save Dates on the tool bar at the top of the page
5. Or click Details and enter the meeting date and time
6. Click Save Meeting Date/Time

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**



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**

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**