New Innovations (RMS) Preparing for a New AY FAQs

MMCGME

Metro MN Council on Graduate Medical Education

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Checklists/Onboarding FAQ's

FAQ: I want to distribute a checklist, but the resident's name doesn't appear on the list.

These are the common reasons for residents' names not appearing in the distribution list:

1. Wrong type of checklist - Be sure you're using the right type of checklist. You can't send an Onboarding checklist to a resident visiting from another institution.
2. No Training Record - Each resident must have a Training Record in their Personnel file.
3. Block Schedule - Resident must be scheduled on a rotation
4. Dates - Advancement and Onboarding Checklists must be distributed before the Advancement Date. Ex: Once an 'Incoming Resident' has advanced to a first year resident, they can no longer receive an Onboarding checklist.

FAQ: The 'View Checklists' link is gone on the resident's Home page. Why?

The 'View Checklists' link expires 30 days after the Due Date of the checklist. They can still access the checklist in the Notifications section of the Home Page.

FAQ: When a checklist has multiple reviewers, can each reviewer see the action taken by other reviewers?

Reviewers can see actions by other reviewers such as uploads, returning a step, comments, and marking a step as complete, but they are not able to see which reviewer performed the action or wrote a comment.

FAQ: Why isn't one of my fellow's name available to distribute an Advancement checklist?

Advancement checklists can be distributed only to residents/fellows whose Training Records reflect any of the following conditions:

- Advancing to another year within their current program
- Graduating
- Becoming Faculty
- Advancing to a new program

If your fellow is advancing from a different program in your database (for instance, one of the Internal Medicine residents will start in your fellowship program next), then this person will be available to distribute an Onboarding checklist instead of an Advancement checklist.

FAQ: How can I change the Due Date on a distributed checklist?
1. Go to Personnel > Checklists
2. Click on either Onboarding, Advancement or Rotation
3. Click the **Progress** tab
4. Select the checklist name in the dropdown
5. Place a check next to the people whose due date you wish to change (you can place a check in the top box to select all)
6. Using the Actions dropdown box on the right. Select **Update Due Dates**
7. Adjust the date
8. Click **Update**

This does not apply to a due date for a step.

FAQ: Who is able to return a checklist step to a resident?
This option is only available for individuals who have Level 5 or 6 privileges in the department where the resident's demographic record resides in the database. The 'Return Step' feature is also available for additional reviewers who have at least a Level 1 in Personnel in the department that distributed the checklist.

FAQ: Why can't I edit a step on a checklist?

Once a step has been distributed to recipients, only certain details can be edited. They are:

- Name of the step
- Instructions
- Whether the recipient can mark it as complete
- If it is for Administrator use only
- Replace a file you had provided to assignees via Information Exchange
- Additional Reviewers
- Conditional Recipients
- Dependent Steps

Should you need to change other aspects of the step, you will need to delete the step and add a new one to replace it. Deleting the step will remove it from **any** distributed checklist, whether the step or the checklist was completed or not. **If the step required entry of information or an uploaded document from the recipient, it will be lost when deleted.**

Adding a new step to a distributed checklist automatically adds it to all existing recipients, even if the checklist was marked as completed.

FAQ: Where can I find uploaded documents from a checklist?

When a step is created which requests the recipient to upload a document, the document is stored in their Personnel record under the Files & Notes tab in a folder named 'Checklist documents.' The sub-folders are named for the type of checklist (Onboarding, Advancement or Rotation). Checklist documents stay with the demographic record of the recipient, even if they move on to a different program in your database.

When building your checklist, as you add steps, you can designate a different folder than the default. We recommend that you don't place checklist documents in folders that don't move with the recipient, such as folders and sub-folders named for your department.

FAQ: Can I add a step after the checklist has been distributed?

Yes, you can!

<u>Add a Step</u>

1. Go to Personnel > Checklists > Onboarding, Advancement or Rotation
2. Select the checklist
3. Click **Edit**
4. Click Add Step
5. Enter a Name and Instructions
6. Click Add Step
7. A pop-up screen will appear. (See below) Read it and click **OK**
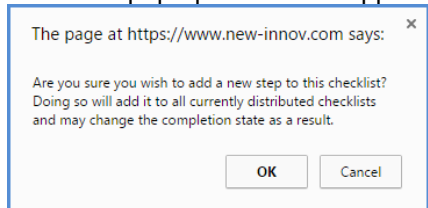
Continue to build your step. The software will automatically add the new step to all distributed checklists.

<u>Send a Custom Email</u>

When you add a new step to a checklist that has been distributed, it will change any 'Completed' checklists to now display as 'Incomplete.' No automatic email is sent to residents when a new step has been added, so we recommend sending a Custom Email to your residents to let them know that a new step has been added.

1. Go to Personnel > Checklists > Onboarding, Advancement or Rotator
2. Click the **Progress** tab
3. Select the Checklist from the dropdown list
4. Check the boxes in front of each person's name
5. Click Actions, and choose Send Custom Email
6. Your default email provider will open
7. Create and send your custom email

FAQ: How many documents can be uploaded in one step?

The Information Exchange step allows checklist recipients to upload up to 5 documents. The recipient can upload documents to this step at any time until the checklist or the step is marked complete.

FAQ: If a coordinator returns a checklist Step to a resident, is the resident notified by email?

Yes, they get a notification via email indicating which step has been returned.

FAQ: Where are the documents that were attached to forms? I can't see them anymore!

Once a document that was uploaded to a form step has been approved, it is moved to the person's Personnel file. It is no longer attached to the Checklist form.

Schedules FAQ's

FAQ: Why do faculty need to be on the block schedule?

The faculty are put on the block schedule so they automatically match with residents and fellows in the Evaluations module. When faculty and residents are on the same rotation for the same dates, they can be matched to evaluate each other

FAQ: How can I determine who scheduled a rotation?

<u>View Scheduled Rotation History</u>

1. Go to *Schedules* > *Schedule Rotations*
2. Select the name from the dropdown list
3. Select the Academic Year
4. Click **History**

View information about the Rotation a Person scheduled. Below that is the history for the Rotation.

History for Rotation

Type of Object:	Rotation
ID:	8185
Name:	**Rotation**
Description:	**Benn, Jason on EM:EM:Red (07/01/2017-07/31/2017)**
Today's Date:	Friday, August 25, 2017 12:49:27 PM
Last Update Date:	**Friday, April 21, 2017 10:12:51 AM**
Last Update By:	**NI Personnel**

ROTATION INFORMATION

Change Date	Change Type	Owner	Start Date	End Date	Person Status	Rotation Department	Rotation	Primary	Work Load	Compensation Status	Home Department	Program	Post Graduate Year	Person Pager	Rotation Pager	Notes	Upda By
4/21/2017 10:12:51 AM	Current	Benn, Jason	07/01/2017	07/31/2017	PRG 2	Department of Emergency Medicine/Emergency Medicine	EM:EM:Red	True	100	C3	Department of Emergency Medicine/Emergency Medicine	Emergency Medicine	3	(330) 329-8817	---	this is a note here.	NI Perso
4/21/2017 10:12:51 AM	Update	Benn, Jason	07/01/2016	07/31/2016	PRG 2	Department of Emergency Medicine/Emergency Medicine	EM:EM:Red	True	100	C3	Department of Emergency Medicine/Emergency Medicine	Emergency Medicine	3	(330) 329-8817	---	---	NI Perso
7/8/2016 8:25:35 AM	Update	Benn, Jason	07/01/2016	07/31/2016	PRG 1	Department of Emergency Medicine/Emergency Medicine	EM:EM:Red	True	100	C3	Department of Emergency Medicine/Emergency Medicine	Emergency Medicine	3	(330) 329-8817	---	---	NI Perso
7/9/2015 9:29:21 AM	Update	Benn, Jason	07/01/2014	07/31/2014	PRG 2	Department of Emergency Medicine/Emergency Medicine	EM:EM:Red	True	100	C3	Department of Emergency Medicine/Emergency Medicine	Emergency Medicine	3	(330) 329-8817	---	---	NI Perso
7/2/2014 11:00:04 AM	Update	Benn, Jason	07/01/2014	07/31/2014	PRG 3	Department of Emergency Medicine/Emergency Medicine	EM:EM:Red	True	100	C3	Department of Emergency Medicine/Emergency Medicine	Emergency Medicine	3	(330) 329-8817	---	---	NI Perso
5/27/2014 3:14:58 PM	Insert	Benn, Jason	07/01/2014	07/31/2014	PRG 3	Department of Emergency Medicine/Emergency Medicine	EM:EM:Red	True	100	C3	Department of Emergency Medicine/Emergency Medicine	Emergency Medicine	3	(330) 329-8817	---	---	NI Perso

Export to

FAQ- How can I see a block schedule with just my residents on it?
Follow these steps to create a custom view that displays only your residents:
1. Go to Schedules>Block Scheduling>View Schedules
2. Click **New**
3. In the box labeled "These Status Types" select the status types for your residents
4. In the Rotators box check "Do Not Show" if you don't want residents who rotate to your department to be included
5. Click **View Block Schedule**
6. If you wish to save this view to be available in the Schedule View drop down box , Enter a name and click **Save**
7. If you wish this view to be the default view displayed, check Set as default

FAQ - How can I include the dates of the blocks when I view the block schedule?
If you would like the Block rotation dates to appear when viewing the Block Schedule, you will need to include the dates in the Academic Year.
- Go to Administration>Software Setup>Academic Year
- Click on the name of the academic year
- Check the "Include Dates" checkbox
  When checked, we add the date to each academic year interval name. This interval name shows up in schedules and throughout the software
- Click **Save**

FAQ - How can I hide the block schedule for the upcoming year from my residents until it is complete?
You can hide the block schedule from residents by hiding the academic year: This action will not hide it for level 5 and 6 administrators.
1. Go to Administration>Software Setup>Local Setup>Academic years
2. Click on the academic year name
3. Place a check in the check box labeled "Hidden"
4. Click **Save**

When you are ready to publish the schedule simply retrace the steps outlined above and uncheck the "Hidden" option.

FAQ - Why do certain rotation names not show up on our block schedule?
Make sure that the view displayed has not been filtered to omit certain rotation names. To check:
1. Go to *Schedules>Block Scheduling>View Schedule*
2. To the right of the Schedule View name click **Edit**
3. Under the section labeled 'Which Rotations' make sure the rotation name you seek is included (hold down the ctrl button to select it)
4. Click **Save and Return**

Curriculum FAQ's

FAQ: Can I add more than one curriculum for a rotation?
Yes, you can have multiple curriculum documents attached to a single rotation. Simply follow the steps for adding a curriculum into the software and designate the correct rotation. We'll then send your residents and fellows all of the curricula assigned to their upcoming rotation.

FAQ: I need to edit the curriculum for a rotation. How do I do that?
Often times your curriculum will need to be updated to reflect changes that have been made to the course offering. After making the changes to your curriculum document in Word, you'll swap the new curriculum for the old one in New Innovations.

Note: If there are confirmations for the existing curriculum, you cannot swap the documents unless you remove the confirmations first.

How can I view the Curriculum I uploaded?
- Go to Schedules > Curriculum
- Click on the name of a Curriculum to view it.
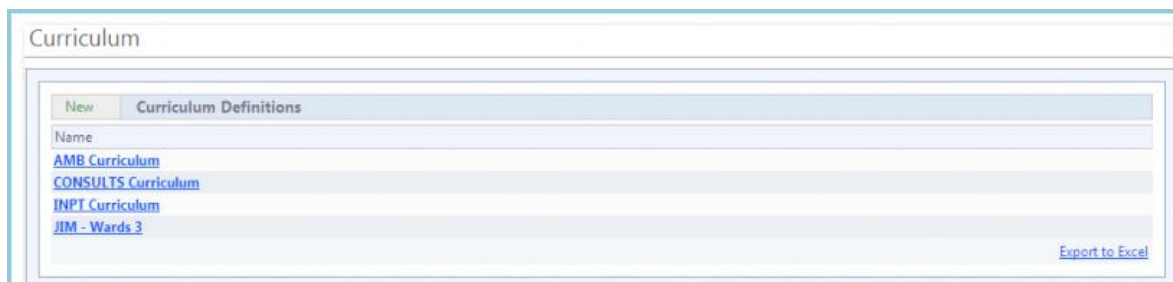
FAQ: What happens with the curriculum when a resident repeats the same rotation?
If a resident repeats the same rotation during an academic year, the system will distribute the curriculum each time the resident serves on that rotation. There is not a way to send the curriculum only once.

FAQ: Who can I send a curriculum to?

Curriculum can be sent to faculty or residents who you schedule on a rotation.

Curriculum can be sent to a resident if you meet either of these two criteria:

- You 'own' the resident
- You 'own' the rotation that the resident is serving

It is possible that a rotating resident will receive a curriculum from both their Home program and from the program that are rotating into for that interval.

Evaluations FAQ's

FAQ: Why aren't my sessions matching?

There can be many reasons why your session is not matching. Make sure these items are in place:

The Block Schedule

- Both Evaluator and Subject on schedule
    - on the same rotation name
    - during the same time period
    - have the Status Type selected in the session

The Session

- Correct Status Types are selected
- All of the rotations that should match are selected
- The rotation ends **within** the session interval
- People from outside departments selected

FAQ: Which types of questions can be mapped to milestones?

What kind of tags or mapping can be applied to the different types of questions on my evaluation forms?

You may associate any of these types of questions to the published Milestone Subcompetencies:
(Doing so will let them appear on CCC Milestone Reviews)

- Rating
- Text
- Yes/No
- Custom Subcompetencies
- EPAs

You may add custom tags and Core Competency tags to any of these types of questions:
(Core Competency tagged results do NOT appear in CCC Milestone Reviews. That requires subcomp tags or mapping)

- Rating
- Multiple Choice
- Text
- Yes/No
- Number
- NOT EPA (they are mapped)
- NOT Milestone narratives (they are mapped by default)
- NOT published Subcompetencies (they are mapped by default)
- NOT Custom Subcompetencies (they are mapped)

FAQ: I just created a form for my program evaluation but when I start building my session, I can't find it.

If there are no forms in your list, you probably built your Program Form as a standard evaluation form instead of using the Program Evaluation option. Program Evaluation forms are built separately from standard forms because Program Evaluation reporting is different than the standard reports. To create a form to use in Program Evaluations, go to *Evaluations > Program Evaluation Forms* in the software.

FAQ: Why does the 'N/A' option on my evaluation form have a value? It's skewing the averages.

When creating a grade scale, do not include N/A as one of the option because the system assigns a value to it. If an evaluator selects 'N/A', the value is added into the averages.

The correct way to add the 'N/A' option to your evaluation form is when you are building it. When adding a question, there is a separate option for 'N/A'. This response will not have a value attached and will not affect the averages shown on reports.

There is not a way to go back and correct those evaluations that have already been completed. However, you can correct the form to have a new correct grade scale for future evaluations.
1. Copy the existing form and insert a new component
2. Go to Evaluations > Evaluation Forms
3. Find the form in the list and click **Copy** from the Actions dropdown list
4. Find the question with the incorrect N/A option and select **Delete** from the Edit options (hover over the question)
5. Select Add a Component
6. Select the type of question from the General types of question
7. Re-enter the text of the original question
8. Enter the labels for each value
9. Check N/A and change the label if you want something other than 'N/A' displayed for the evaluator
10. Check additional options as needed
11. Click **Add**
12. When all of the questions have been corrected, click **Done**

Replace the new form in the Session

1. Go to Evaluations > Session Manager
2. Select the session that uses the form with the wrong N/A option
3. Go to the Evaluation Form tab
4. In the Current Form drop-down list, select the new form
5. Click Save Session

The new form with the correct grade scale will be distributed for any matches made in the future. However, you may have existing matches that have the old form. Rematch each interval of your session by clicking "Match Interval" and the new form will be assigned to these matches.

FAQ: Why can't I check the box for "Email Notifications are enabled" in my session?

Your session has enabled an option called "Evaluations are for administrative use only". This option prevents pending evaluations from displaying to the evaluator and no emails are sent.

How to check:
1. Go to Evaluations>Session Manager
2. Click the Settings tab
3. Check **Show advanced settings**
4. Under Administrative Options see if that option is checked
5. If it was selected in error, un-check the option
6. Click Save Session

FAQ: Why do all of my automatic matches show the date of the interval and not the dates that the evaluator and subject worked together?

The option to display the interval dates for matches instead of the rotation period shared between the evaluator and subject has probably been selected in the session.

How to check:
- Go to Evaluations>Manage Sessions
- Click on the name of the session
- Click the **Settings** tab
- Check 'Show advanced settings'
- Under Display Options, change this option "Which dates should be displayed on the form" to Match Dates instead of Interval Dates
- Click Save Session

FAQ: Why are there two evaluation form names in my session?

When a match is made either automatically or manually, the form sent to the evaluator is the current form selected in the session on the evaluation forms tab.

If however, a feature called evaluation form relationships was configured to dynamically send a different form based upon a particular status of evaluator or subject or rotation name, and a match meets these parameters, the current form will not be used. This applies only if the session does *not* have the box checked that reads "Disregard relationship and use the current form".

If you see multiple form names, it means that matches in the session were created using more than one form. It could mean that another form was used for some matches due to configured form relationships. The other reason this could occur is if you matched a session using the current form and then later changed the current form. When the current form is changed, it does not retroactively apply to matches already made, but only applies the new form to future matches.

To see which form applied to a match follow these steps:

- Go to Evaluations>Session Manager
- Click the name of the session
- Click the Match Schedule tab
- Click the name of the interval
- Check the box that reads "Show evaluation forms"

Faculty Evaluation of Resident

Interval 1		0 matches	n/a		Available Date: 7/24/2016

All	Delinquent	Completed	Pending Signatures	Declined

🔍 View ☐ Hide evaluator info   Actions ▼

☐	Evaluator	Subject	Evaluator Status	Subject Status

If a match is still pending and the wrong form is used, you will need to fix the condition that applied the wrong form first. You can then delete the match and recreate it, which will apply the current form.

FAQ: Why can't I find the rotation I need in the drop down box when I am creating a manual match?

When you create a manual match, your selections are limited to only those rotation names that you have included in the active rotations box on the rotations tab of the session. Go to the rotation tab in your session and move over the selection you need from the Available Rotations box to the Active Rotations box using the directional arrows, and then click **Save Changes.**

Now, when you go back to create your match, that rotation will appear.
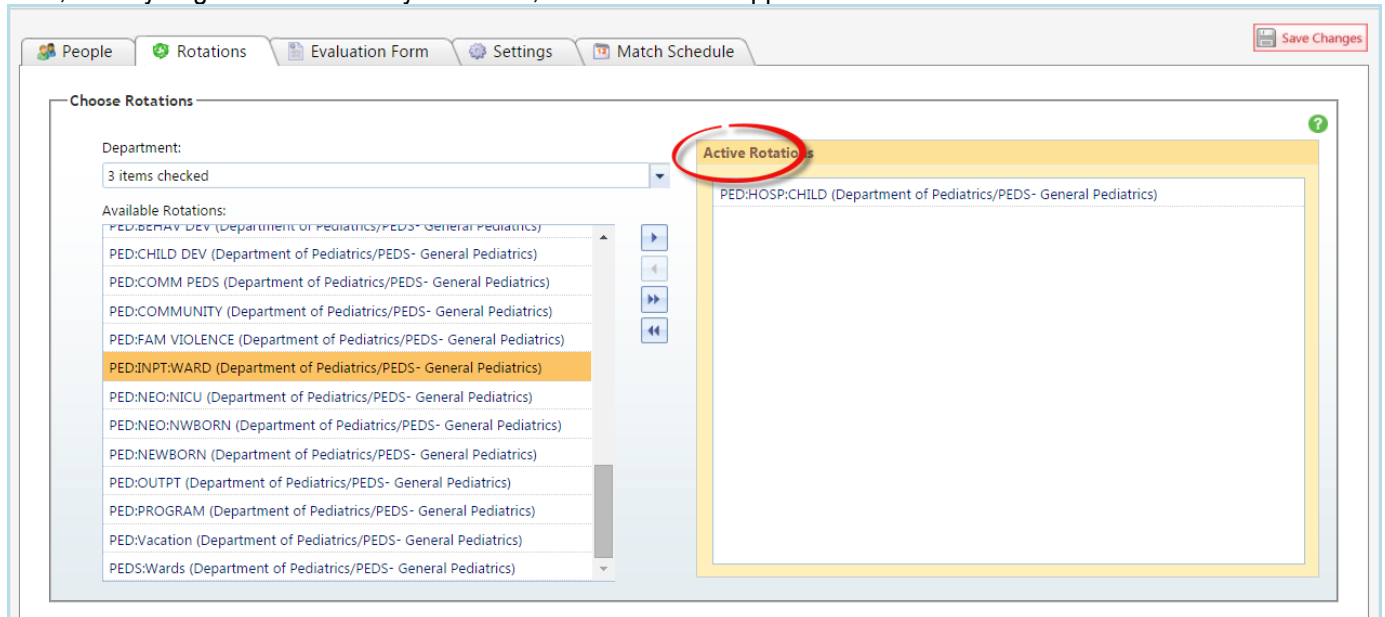
FAQ: What do the different colored matches mean?

The different colors indicate how the match was made:

No color = match was created automatically by the system
Aqua = match was manually created by the session administrator
Yellow = match was made by the evaluator in an on-demand session
Pink = match was made by the subject in an on-demand session

FAQ: I've set up quarterly intervals, but I'm getting monthly matches. Why?

This is sometimes an issue for fellowships that only have quarterly evaluations of their fellows. For example, the block schedules for the fellows are created on a monthly basis, but the session has quarterly intervals. There should be only one evaluation distributed covering 3 months, but instead the session is distributing 3 evaluations (one for each month in the quarter).

In this case we'll use the Advanced Settings to solve this problem:
1. Go to *Evaluations > Session Manager*
2. Click on the name of the session
3. Click the Settings tab
4. Check the box for 'Show advanced settings'
5. In the Match Options section, check the box for 'Create only one match for an evaluator/subject pair
6. In the Display Options section, click the radio button to display the date range 'for the session interval'
7. Click **Save Changes**

Rematch Interval
You will probably need to rematch the interval to get the right dates on the matches. Here are the steps to do that:
1. Go to *Evaluations > Session Manager*
2. Click on the name of the session
3. Click the Match Schedule tab
4. Check the box(es) in front of the intervals that need to be rematched
5. Click **More > Match**
6. Click on an interval to check out the matches for that time period

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FAQ: How do I change the type of session from eval of a person to eval of a rotation?

The type of session is something you cannot change once you've save it. Each type of evaluation - People, Rotation and Program - have their own configurations that are presented to you as you create the session. This is why you cannot change the type. Please delete the session with the incorrect type and create a new one with the correct type.

FAQ: In my session, why does my People tab have N/A on the subject side?

The session is a Rotation Evaluation. When you set up a session type as 'Rotation', the subject is N/A because the rotation itself is what is being evaluated. When the match is made, you will see the rotation name in the match on the match schedule tab.

FAQ: Why does my resident have the wrong status on a match?

At the time that the match is created, the software looks at information on the block schedule to determine the status type. If a resident has the wrong status on an evaluation match, we suggest checking the status on the block schedule for the evaluation time period.

If the match is still pending, you can correct the status:

If the match is completed there is not a way to correct the status unless you print out the completed evaluation, delete the match, re-create the match and then record the results on behalf of the evaluator.

You will want to correct any status types that are incorrect in the resident's block schedule to prevent the same thing from happening for future blocks.

FAQ: I am not able to see evaluations. I click View but nothing happens.

When you click a button or link and nothing happens, it may be related to a pop-up blocker in your internet browser. Please use the following instructions for the browser you are using:

Google Chrome
1. Open Chrome
2. In the top-right corner, click the Chrome menu ≡
3. Click **Settings**
4. At the bottom of the page, click **Show advanced settings**
5. Under "Privacy," click **Content settings**
6. Under "Pop-ups," select **Manage exceptions...**
7. Add www.new-innov.com to the list

FireFox
1. Click the **menu button** ≡
2. Choose options
3. Select Content Panel

4. In the content panel below Pop-ups, uncheck the box nest to Block Pop-up windows to disable the blocker altogether
5. Click on **Exceptions...** to designate which sites to still allow pop-ups to be blocked

Safari on a Mac
1. Open Safari
2. In the top left, select "**Safari**," then select "**Preferences**" from the drop down menu
3. The preferences pane will open and select "**Security**" on the top row
4. Uncheck the "**Block pop-up windows**" box

Microsoft Edge
1. Open Edge
2. In the top-right corner, click ···
3. Click **Settings**
4. Click **Cookies and site permissions**
5. Click **pop-ups and redirects**
6. Scroll to Allow and click **Add**
7. Type www.new-innov.com and click Add

FAQ: Rotation Relationships are not working in a session with mapped rotations.
When you mapped rotations between evaluator and subject, the link between the evaluation form relationships and the rotation is severed. Rotation mapping overrides evaluation form relationships.

Logger FAQ's

FAQ: What is the difference between Pass, Not Pass and Refusing a procedure?

When confirming a procedure, a faculty member has the following choices:

- Pass = the supervisor observed the procedure and approved the resident's performance
- Not Pass = supervisor observed the procedure but will not approve the resident's performance
- Refuse = usually used when the supervisor's name is selected in error

FAQ: What if my residents performed procedures before we used NI?

Procedures already performed can be added to the system as 'offsets'.

FAQ: My PD has Level 5 privileges in Procedure Logger. Why isn't his name in the supervisor dropdown list?

Your Program Director must have level 3 privileges in Procedure Logger, in addition to the level 5 privileges, for his name to appear in the supervisor list.

1. Go to Personnel > Personnel Records
2. Select your Program Director's record
3. Click Security and Privileges
4. Click **Edit**
5. Check the box for Level 3 for Procedure Logger
6. Click Save and Return

The different privilege levels in Procedure Logger do different things. They can be used in combination. The higher privilege level **does not** cancel out a lower level of privileges.

- Level 1 - View the Who's Privileged Report from the Home Page
- Level 2 - Log Procedures, view own procedure logs
- Level 3 - Appear in supervisor dropdown list for all procedures in the department
- Level 4 - View procedure logs for everyone in the department
- Level 5 - Configure the module, view procedure logs for everyone in the department
- Level 6 - Manage Procedure Logger in all programs. Allow L5 administrators to modify or prevent modifying privileging options

FAQ: A faculty member is not appearing on the Supervisor list. How can I get her name to show up?

There are several reasons a person's name may not be appearing on the Supervisor list:

1. The person needs to have a Level 3 privilege in Procedure Logger in their Personnel file. (Go to **Personnel** > **Personnel Records**. Click **Security & Privileges** on the person's record and adjust the privilege levels.) If it is your PD who you cannot find, they may have level 5 in Procedure Logger, so you will need to add level 3, as this is one time when having two different levels is necessary.
2. The person needs to have a Work Role of Faculty. (Go to **Personnel** > **Personnel Records**. Click **Basic Information** on the person's record and edit the work role.)
3. If the person is from an outside department, be sure to include that department in your configuration. (Go to **Logger** > Under Setup: **Procedure Logger** > **General** tab. Click **Enabled** for 'Use supervisors from other departments' and add the outside department.)

FAQ: My procedures are not appearing on the Portfolio Reviews or Procedure Logger reports. I'm using the automatic privileging system, but it's not working. What am I doing wrong?

To use the automatic privileging system, be sure to have the following options configured in your setup:

1. The 'Role in Procedure' field is marked as 'Required'
2. The 'Supervisor' field is marked as 'Required'
3. For each procedure, the 'Oversight' box must have a target number.
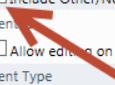
FAQ: How do I get the option of 'Other/None' to appear in the Supervisor dropdown list when residents log procedures?

1. Go to Logger > Setup > Configuration
2. Click the **Fields** tab
3. In the Default Log Fields section, under 'Attending/Supervisor,' check the box for **Include Other/None option**
4. Click Save Configuration

Conferences FAQ's

FAQ: QR codes don't work with Single Sign On

Most databases using SSO (single sign on) cannot use the QR codes because of the sign-on validation. However, databases using SAML type of SSO **can use the QR code.**

If you have questions about the type of SSO your database uses, please contact your IT Department. Technical questions about receiving error messages or inability to connect should be submitted via a support ticket.

FAQ: How can I allow residents and fellows to take their own attendance?

Residents and Fellows need level 3 privileges in Conferences in order to take their own attendance. Note:

The attendance page must still be saved by an Administrator for attendance to be counted. Any resident or fellow who has not yet taken their attendance will be marked absent when this page is saved. If a person is considered absent (no check box marked) and eventually records their attendance, the page needs to be re-saved.

How Residents Take Their Own Attendance
1. Go to *Conferences > My Attendance*
2. Adjust the date range if needed and click **Update List**
3. Mark the correct attendance option: Present, Tardy, Excused
4. Leave the row empty if absent from the conference
5. Click **Save**. Do this every time you exit the page

Update a Resident or Fellow's Privileges
1. Go to *Personnel > Personnel Records*
2. Select a resident's record
3. Click **Security & Privileges**
4. Click **Edit** next to the resident's existing privileges
5. Check the box for Level 3 in the Conferences row
6. Click **Save and Return**

Update Multiple Residents or Fellows' Privileges
1. Go to *Personnel > Manage Multiple Records > Privileges*
2. Select **Add Privileges**
3. Select the appropriate department
4. Select the Resident work role and statuses
5. Click **Display Available People**
6. Check the level 3 block for the Conferences row
7. Click **Update Privileges**

FAQ: Can I add one survey for residents and a different one for Faculty?

Yes, more than one survey can be added to a conference and assigned by status.

1. Go to *Conferences* > *Manage Conferences*
2. Highlight the conference and click the Edit icon on the task bar
3. Go to the Survey Settings tab
4. Select the first survey from the form dropdown list
5. Select the statuses that should get this survey
6. Click Add **Another Survey Form**
7. Select the next form
8. Select the statuses that should get this form
9. Continue setting up the due date and email options
10. **Save**

FAQ: How do I mark someone as 'Absent' for a conference?

When taking conference attendance, there is no column labeled as 'Absent.' However, if a resident is not marked as Present, Tardy or Excused, they are then assumed to be 'Absent.' Below you'll find two ways to record that the resident did not attend a conference:

Attendance by Conference Tab

1. Go to *Conferences* > *Record Attendance*
2. Click the **Attendance by Conference** tab
3. Adjust the date range, if necessary, and click **Update List**
4. Select a conference from the list
5. Check the appropriate box for Present, Tardy and Excused. Any conference with no check marks will record as 'Absent'
6. Click **Save**

Note: Even if no person was in attendance, you must click **Save** to mark them all as 'Absent.'

Conference Attendance Roster

Journal Club
11/11/2015 12:00 PM - 11/11/2015 1:00 PM

Edit | Add People | Remove People | Edit Roster Configuration | Rebuild Roster Now   < (11/11/2015) Journal Club ▼ | Attendance Listing | Conference List

All Present | All Tardy | All Excused | Clear All | Save   Total Attendees: **10** - Attendees to show on each page: 75 ▼

Present	Tardy	Excused	Name	Status	Dept./Div.	Primary Rotation	●/?
☐	☐	☐	Archer, David A	PRG 1	FM-Family Medicine	FM:Geri-PCMH	?
☐	☐	☐	Wise, Craig	PRG 1	FM-Family Medicine		?
☐	☐	☐	Wolf, Becky	PRG 1	FM-Family Medicine	FM:ComMed-SC	?
☐	☐	☐	Aktar, Aboud	PRG 2	FM-Family Medicine	FM:Derm-SC	?
☐	☐	☐	Julka, Vijay	PRG 2	FM-Family Medicine	FM:MedA-SC	●
☐	☐	☐	O'Doull, Kathleen	PRG 2	FM-Family Medicine	FM:Card-SC	?
☐	☐	☐	Parke, Brenda	PRG 2	FM-Family Medicine	FM:Derm-SC	?
☐	☐	☐	Baker, Thomas Eugene	PRG 3	FM-Family Medicine	FM:AmbGyn-SC	?
☐	☐	☐	Gomez, Maria	PRG 3	FM-Family Medicine	FM:MedC-SC	?
☐	☐	☐	Wallace, Charles	PRG 3	FM-Family Medicine	FM:MedB-SC	?

Export to Excel

Attendance by Person Tab

1. Go to *Conferences > Record Attendance*
2. Click the **Attendance by Person** tab
3. Select a person
4. Adjust the date range, if necessary, and click Update List
5. Check the appropriate boxes for Present, Tardy and Excused. Any name with no check marks will record as 'Absent'
6. Click **Save**

Log My Attendance						

Attendance By Conference | Attendance By Person

Record Attendance for: Julka, Vijay ▼   Filter People
Conferences From: 9/11/2015 🔳 To: 11/11/2015 🔳 Update List
☐ Show Only Required Conferences (Those counting toward attendance statistics)

Conferences

Attendance being taken for: **Julka, Vijay**

All Present | All Tardy | All Excused | Clear All | Save

Present	Tardy	Excused	Name	Date	Content Category	Sub Content
☐	☐	☐	Journal Club	11/11/2015 12:00 PM	Journal Club	
☐	☐	☐	Grand Rounds	11/9/2015 7:00 AM	Grand Rounds	
☐	☐	☐	Journal Cluc	11/4/2015 12:00 PM	Journal Club	
☑	☐	☐	Grand Rounds	11/2/2015 7:00 AM	Grand Rounds	
☑	☐	☐	Journal Cluc	10/28/2015 12:00 PM	Journal Club	
☑	☐	☐	Grand Rounds	10/26/2015 7:00 AM	Grand Rounds	
☑	☐	☐	Journal Cluc	10/21/2015 12:00 PM	Journal Club	
☑	☐	☐	Grand Rounds	10/19/2015 7:00 AM	Grand Rounds	

FAQ: How can my residents see the conference schedule on their phones?

Make sure the conference configuration includes the option to include on People's 'My Schedule' view

1. Go to *Conferences > Manage Conferences*
2. Highlight the conference and click the **Edit** icon in the task bar
3. On the Main tab, check the box "Include on People's 'My Schedule'
4. **Save**

Now have residents download the iCal option in Assignment Schedules

1. Go to *Schedules > My Schedule*
2. Click the link to **Subscribe to My Schedule**
3. Accept the terms and click **Create iCalendar Link**
4. Click the link to the calendar of choice
5. Click **Return to Schedule**

FAQ: How can I make a conference calendar with only certain conference details on it?

Create a Custom View to limit what appears on the calendar.

1. Go to *Conferences > Calendar*
2. Click the green **+ icon** to the right of the Custom View dropdown list
3. Enter a name for the view
4. Select the items to display
5. You may set this view as the default view for people in your department by checking the box
6. Click **Save**

Edit a custom view by clicking the pencil/paper icon. Delete a custom view by clicking the red X icon.

FAQ: Can I put the conference calendar on my home page?

No, at this time the conference calendar cannot be displayed on the Home Page. You can still use the My Favorites links to take you to your calendars.

FAQ - How do I cancel a previously scheduled conference?

If attendance has not been taken, you can use the Delete icon on the Manage Conference tool bar.

1. Go to *Conferences > Manage Conferences*
2. Select a conference. Adjust the date range, if necessary.
3. Click **Delete** on the task bar above the list
4. If it is a recurring conference, select either **delete only this conference** or **delete the entire recurring group/series**
5. Click **Delete** on the task bar above the list.

Conferences cannot be deleted if attendance has been taken. Clear the attendance roster and then delete the conference.

FAQ - How can I preview a conference survey form?

As an Administrator, you can preview a conference survey prior to distribution.

1. Go to *Conferences > Surveys > Survey Forms*
2. If the form was used previously, click **View**
3. If the form has not been used, click **Edit**

FAQ - What does the question mark next to a name on a conference roster mean?

The question mark means that attendance has not been recorded for that individual.
 Sometimes you will see that only one person's name on an entire roster has a question mark. This could mean that their name was added to the roster for a conference where attendance was already taken. To resolve it, take attendance for that person and re-save the roster.

Portfolio FAQ's

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

Follow the steps below to have an assigned Portfolio Review generate results overnight:
1. Go to Portfolio > Manage Reviews
2. Click **View** in front of the review you want to generate
3. Click Schedule Data Capture

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

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

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

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

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

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

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

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

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

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

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

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

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

Additionally, the data can be captured in a few different ways: based upon the review meeting date, based upon the review end date or manually:

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

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

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

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

FAQ - Why are all test scores for my residents showing up on their portfolio review?
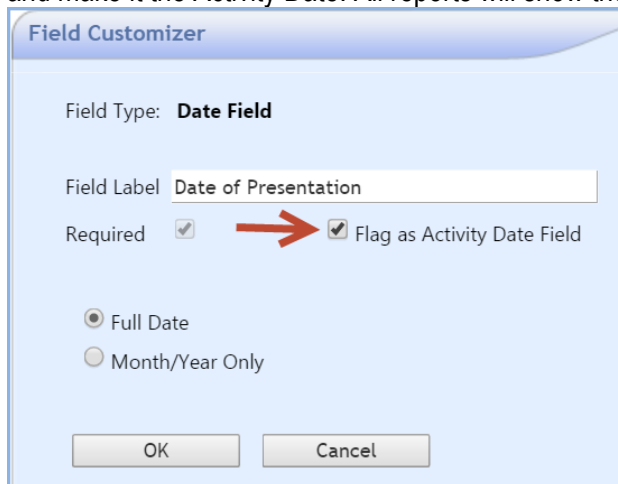
By default, any test scores that were recorded for a resident in their demographic record will be included, as long as it was taken during their residency period. You can filter the list of types to be included, however, you cannot filter to only include them for a designated date range.

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

FAQ: What is an 'Activity' and 'Date' Identifier?

Activity Description and Activity Date (date the scholarly activity is logged) fields are the defaults that are used to sort entries when Activities are viewed and reports are generated. However, you can change the field for Activity and Date identifier to whatever you prefer rather than using the default.

Some programs would rather see a different date on reports instead of the logged (activity) date. For instance, the date of the presentation. In that case, select one of the date fields, name it Presentation Date and make it the Activity Date. All reports will show the presentation date instead of the date logged.

Fields that can be used as the **Activity Date** field:
- Activity Date {date field}
- Date {date field}
- Date

Fields that can be used as the **Activity Description** field:
- Activity Description {Single Line Text}
- Authors {Single Line Text}
- Book Title {single line text}
- City {single line text}
- Editors
- Grant Title
- Granting Organization
- Investigators
- Issue
- Journal
- Meeting Sponsor
- Page Number

31

- Presenter
- Publisher
- Text Box
- Title of Abstract
- Title of Article
- Title of Chapter
- Title of Presentation
- Volume

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

In the Notifications section of your PD's home page, there's a section labeled "PORTFOLIO". Notifications appear for upcoming meeting dates or review periods or for reviews with required signatures.
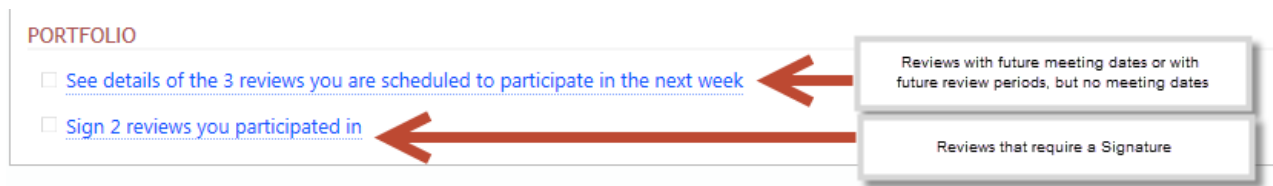
Notifications
You can set up notifications for when the data captures for a review, but this doesn't work with the manual capture.

Reminders
You can also send email reminders (these don't happen automatically but you can trigger them).
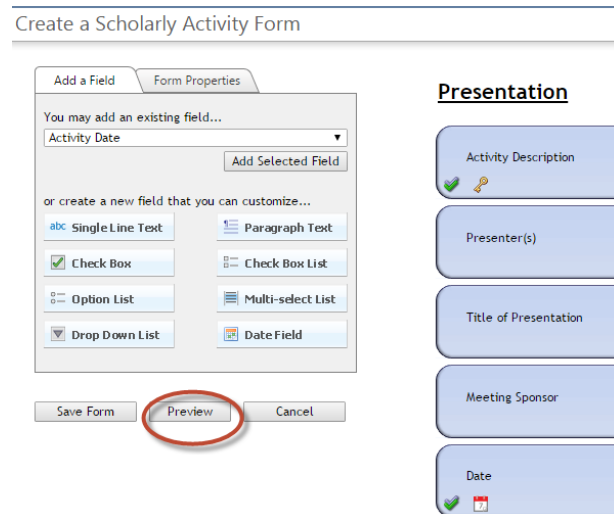
Those are your options in New Innovations, but you may be best served by scheduling portfolio reviews using whatever external tools you use for scheduling.

FAQ: Why is my name on one of the resident's entries?

If you log a Scholarly Activity on behalf of the resident, your name is recorded, not the resident's.

FAQ: What do the Scholarly Activity fields look like to the person who completes it?

There is a Preview button on the page where you build the form. Just add the fields you want and click on preview to see what the resident or faculty see when they open the form.

FAQ: I need to edit to a form. Can I do that?

No. Once a form is in use it cannot be edited. However, a form can be copied and the edits made to the copy. The old form can be archived so it is not available to the residents or faculty.
However, ADS categories can be added at any time and will show up retroactively on reports.

FAQ: What is a 'contributor' in Scholarly Activities?

A contributor is a person who will assist or guide a resident on a scholarly activity. They can view the details of the entry. When the resident logs the activity, they designate the person to act as a contributor. An email is sent to the contributor and a link is placed in the Notifications panel of their home page

Click the link to accept or refuse the invitation to be a contributor.

Accept contributions to add them to your list of scholarly activities. Refusing contributions will remove them from this list.

	Activity Owner	Activity	Activity Description	Completed On	
View	Arthur, David	Abstracts	Abstract: Measles in Male Adolescent	11/24/2015 3:58:02 PM	

Export