



# Program Director

RMS GUIDE

MMCGME Services

2018

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# Administration Module

## Program Dashboard

### **Administration>Dashboard>Program**

The Program Dashboard provides a real-time view of resident progress in areas such as evaluation and duty hour logging compliance.

The Program Dashboard is an interactive tool to help you monitor accreditation data, investigate department level information and take action on specific issues of noncompliance. Your program's data is organized by module and displayed in an easy-to-read graphical format.


- Evaluations - Distribution, Compliance for Faculty and Residents completion, number of incomplete evaluations
- Duty Hours - Violations and logging compliance
- Schedules - Percentage of residents who have block schedules for each month of the academic year, compliance with rotation requirements (if configured)
- Personnel - Data entry progress for required, IRIS and advancement information for active and incoming residents
- Curriculum - Rotations with curriculum and percentage of residents who have confirmed reading it
- Portfolio - Reviews scheduled, Scholarly Activities logged and Journaling assignments completed
- Procedure Logger - Percentage of final year residents who have met privilege targets
- Conferences - Percentage of residents who have met attendance requirements and the percentage of conferences with surveys configured



# Agreements

## Administration>Agreements

- Store and track letters of agreements between:
- Institution and outside training locations
- Programs and their affiliate training locations
- Create automatic notifications for agreement expirations

Program: <input type="text" value="Emergency Medicine"/> 						
Agreements						
Program	Affiliate Training Location	Agreement Type	Agreement Milestone	Original Approval Date	Current Approval Date	Expires On
Emergency Medicine	City Hospital	NPA				
Emergency Medicine	City Hospital	NPA	Rec'd from PD			
Emergency Medicine	Reed Clinic	PLA	All signatures completed	03/18/2013	03/18/2013	03/31/2014
Emergency Medicine	Veterans Hospital	PLA	All signatures completed	05/27/2005	06/13/2008	06/30/2011
Emergency Medicine	Veterans Hospital	PLA	All signatures completed (06/02/2013)	06/02/2013	06/02/2013	06/30/2014

## Personnel Module

### ***Personnel>Type the name of person in the search bar***

The Personnel module holds all of the data about the people in your institution.

A person's Personnel Record includes information such as their picture, contact information, emergency contacts, training record, education history, immunizations, licenses, test scores and more. This data can be easily accessed, shared, and included in various reports.

Personnel Records


FM-Family Medicine Summary 3 Incoming 10 Active

**Aktar, Aboud**  
Resident - FM-Family Medicine

Filter List Checklists Add Person

Demographics Schedule Verifications Files & Notes

Complete Record Summary



PRG 2  
[aaktar]

Username & Password  
Security & Privileges

Deleted Items History  
Delete Record  
Archive Record

**Personal**

Work Role: Resident  
Credentials: M.D.  
Status: PRG 2  
Compensation Status: C2  
Post Graduate Year: 2

**Basic Information**  
Custom Data  
Sensitive Information  
Immunizations  
Visas  
Uniform Articles  
Family Members  
Citizenship  
Previous Names  
Languages  
Access Cards

**Contact**

Primary:  
DemoMail@new-innov.com  
Home: (330) 499-2317

**Email Addresses**  
Phone/Pager  
Addresses  
Emergency Contacts

**Other**

**Certifications:**  
ACLS Expires on 5/31/2018  
BLS Expires on 5/1/2017  
HIPPA Expires on 5/1/2018  
**Board Certifications:**  
ABFM in Family Medicine - General  
**DEA Licenses:**  
Federal (35346564) Expires on 6/30/2018  
**ID Numbers:**  
New Innovations: 683

**Certifications**  
Board Certifications  
Licenses  
ID Numbers  
Test Scores  
Education  
Permits  
Practices  
Memberships

**Residency/Fellowship**

**Program Info:**  
Family Medicine  
7/1/2014 - 6/30/2017  
**Advisor:** Jones, Robert  
**Training Record:**  
Family Medicine - St. Christopher Medical Center  
PRG 1 - 7/1/2014 to 6/30/2015  
▶ PRG 2 - 7/1/2015 to 6/30/2016  
PRG 3 - 7/1/2016 to 6/30/2017

**IRIS Info:**  
**Name:** Aktar, Aboud  
**SSN/SIN:** 623-78-6512 (USA)  
**Employer:** St. Christopher Medical Center  
**Post Graduate Year:** 2  
**Initial Program:** Family Medicine - General (IRP: 3)  
**Workload:** 100%  
**Medical School:** Ain Shams University Faculty of Medicine  
**ECFMG:** 8/15/2014

**Training Record**  
IRIS Information  
Contracts  
ECFMG  
Continuity Clinic  
Legacy Departments  
Payroll  
Simultaneous Match

## **Four Tabs in Personnel Record**

### **Demographics Tab**

- Left Panel - Displays their photo, username, status type; Links included for managing record
- Personal - Contains their basic information, visas, languages, sensitive information, etc.
- Contact Information - Contains personal contact information, along with their emergency contacts
- Other - Holds test scores, ID numbers, certifications and expiration dates for various types of licenses
- Residency/Fellowship - Stores information about their training program, such as their Training Record, contracts and IRIS information

### **Schedule Tab**

- View and access the person's Block Schedule
- View and access the person's Assignment Schedule

### **Verifications Tab**

- Print Verification Letters for your residents and fellows

### **Files & Notes Tab**

- Store documents and create folders for organizing attachments
- Enter public, confidential or private notes about each person

## Schedules Module

### Schedules>Schedule Rotations or View Schedule

#### Block (Rotation) Schedules

- Create rotation schedules for residents, fellows and faculty and make the details available for viewing
- Create rotation requirements to monitor and track residents' progress through their programs
- Provide custom views for easy access to specific data
- Use rotation schedules to automate evaluations and inform the duty hour rule checking process
- Import On Call/AMION schedules

PRG 1 (Emergency Medicine)												
Baron, S	EM:BURN	TOX	EM:TRAUMA	Emergency	EM: COMMUNITY MEDICINE	VA TOX	DM:ID:ID	Women	CCU	OB/G & GYN	TOX	EM:TRAUMA
Bashir, M	ANES	Gastro	PEDS	Endo Consults	DM:ENDO- Green/Union (Monthly)	EM: COMMUNITY MEDICINE	Emergency	EM VA	Patho Phys	PEDS	TOX	EM:TRAUMA
Caputo, E	EM:BURN	EM:BURN	EM:BURN	Patho Phys (10/1 - 10/15) PEDS (10/16 - 10/31)	EM:TRAUMA	PEDS	EM:BURN	Emergency	Patho Phys	EM: COMMUNITY MEDICINE	EM:TRAUMA	Women
Collins, M	DM:ENDO- Green/Union (25%/50%)	EM: COMMUNITY MEDICINE	EM:BURN	Emergency	Patho Phys	EM VA	PEDS	TOX	VA TOX	EM:TRAUMA	EM: COMMUNITY MEDICINE	EM:BURN
Craft, S	EM:BURN	EM:TRAUMA	VA TOX	EM:BURN	DM:ID:ID	Amb	EM: COMMUNITY MEDICINE	EM:TRAUMA	TOX	PEDS	VICU	EM:TRAUMA
Fawcett, A	EM VA	Shallward	EM:BURN	EM:TRAUMA	SURG	Amb	PEDS	Shallward	DM-ENDO- OUTPATIENT	Emergency	VICU	EM:BURN



## Assignment (Daily) Schedules

### Go to Schedules > Assignment Scheduling > My Schedule

- Create call and clinic calendars
- Offer individual schedules that include daily assignments, monthly rotations, conferences and scheduled portfolio reviews
- Apply schedules to multiple people at one time
- Allow residents to request time off or to change their assignments
- Import On Call/AMION schedules

My Schedule						
Brenda Parke						
View: Parke, Brenda						
in the date range: 7/1/2015 7/31/2015 Change						
Visible Event Types: <input checked="" type="checkbox"/> Templated Assignments <input checked="" type="checkbox"/> Other Assignments <input checked="" type="checkbox"/> Rotations <input checked="" type="checkbox"/> Conferences <input checked="" type="checkbox"/> Reviews <a href="#">Change My Schedule Subscription</a>						
<a href="#">&lt; Previous</a> <a href="#">Month</a>   <a href="#">Week</a>   <a href="#">Day</a>   <a href="#">Year</a> <a href="#">Next &gt;</a>						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	Jul 1	2	3	4
			EM MedB-SC			
			8:00 AM-12:00 PM VA - AM Clinic at Veterans Hospital		8:00 AM-12:00 PM VA - AM Clinic at Veterans Hospital	
			1:00 PM-5:00 PM VA - PM Clinic at Veterans Hospital		1:00 PM-5:00 PM VA - PM Clinic at Veterans Hospital	
5	6	7	8	9	10	11
			EM MedB-SC			
	8:00 AM-12:00 PM VA - AM Clinic at Veterans Hospital		8:00 AM-12:00 PM VA - AM Clinic at Veterans Hospital		8:00 AM-12:00 PM VA - AM Clinic at Veterans Hospital	
	1:00 PM-5:00 PM VA - PM Clinic at Veterans Hospital		1:00 PM-5:00 PM VA - PM Clinic at Veterans Hospital		1:00 PM-5:00 PM VA - PM Clinic at Veterans Hospital	
12	13	14	15	16	17	18
			EM MedB-SC			
	8:00 AM-12:00 PM VA - AM Clinic at Veterans Hospital		8:00 AM-12:00 PM VA - AM Clinic at Veterans Hospital		8:00 AM-12:00 PM VA - AM Clinic at Veterans Hospital	
	1:00 PM-5:00 PM VA - PM Clinic at Veterans Hospital		1:00 PM-5:00 PM VA - PM Clinic at Veterans Hospital		1:00 PM-5:00 PM VA - PM Clinic at Veterans Hospital	
19	20	21	22	23	24	25
			EM MedB-SC			
	8:00 AM-12:00 PM VA - AM Clinic at Veterans Hospital		8:00 AM-12:00 PM VA - AM Clinic at Veterans Hospital		8:00 AM-12:00 PM VA - AM Clinic at Veterans Hospital	
	1:00 PM-5:00 PM VA - PM Clinic at Veterans Hospital		1:00 PM-5:00 PM VA - PM Clinic at Veterans Hospital		1:00 PM-5:00 PM VA - PM Clinic at Veterans Hospital	
26	27	28	29	30	31	Aug 1

# MedScheduler

- The MedScheduler is a desktop scheduling application designed specifically for use with the New Innovations scheduling modules.
- Create schedules easily and quickly
- Simple and quick installation
- Use rules to ensure people are scheduled properly
- Ensure full coverage with scheduling tools
- Sync schedules securely with the online software

The screenshot displays the MedScheduler application window. The main area is a grid showing monthly rotations for various medical specialties from July to February. The grid lists names in the first column and rotation codes in subsequent columns. A blue box highlights the 'FM:MedA-SC' rotation for Gomez, Maria in September. The left sidebar, titled 'Rotation Favorites', lists various medical specialties such as 'OB:IM:WOMEN'S HEALTH', 'EM:EM', 'EM:PEDS:EMC', etc. The right sidebar contains 'Properties' (Basic, Advanced) and 'Statuses' (Commonly Used) sections. The 'Basic' properties show details for 'Gomez, Maria', including rotation 'FM:MedA-SC', start date '9/1/2015', end date '9/30/2015', status 'PRG 3', and department 'Department ...'. The 'Statuses' section shows a list of status codes and their corresponding colors.

## Curriculum

### Schedules>Curriculum

- Distribute rotation goals and objectives to residents and fellows prior to their scheduled rotations
- Notify recipients through email and home page notifications that documents are ready for review
- Require people with assigned curriculum to confirm that they've read and understood the rotation goals and objects
- Generate Confirmation Reports

### View Confirmation Report

**Go to Schedules > Curriculum > Confirmation Report tab**

1. Specify the date range or an academic year
2. Select the Rotations
3. Select the Statuses
4. Select one of the following:
5. Show people that have **Confirmed or Not Confirmed** displays both people who have and have not confirmed reading curriculum assigned to them.
6. Show people that have **Confirmed** displays only people who have confirmed reading curriculum assigned to them.
7. Show people that have **Not Confirmed** only displays people who have not confirmed reading curriculum assigned to them.
8. Define the date range of review considered acceptable.
9. Click **View Report**

Confirmation Report

[Send Email Reminder](#)

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

Back

1 2

Reminder	Name	Department	Status	Rotation	Start Date	End Date	Curriculum	Confirmed
<input type="checkbox"/>	Carson, John	JGB Internal Medicine	PRG 3	(JGB Internal Medicine) JIM:AMB	7/1/2012	7/31/2012	<a href="#">(JGB Internal Medicine) AMB Curriculum</a>	4/26/2013 10:13:44 AM
<input type="checkbox"/>	Loree, Roul	JGB Internal Medicine	PRG 2	(JGB Internal Medicine) JIM:INPT	7/1/2012	7/31/2012	<a href="#">(JGB Internal Medicine) INPT Curriculum</a>	
<input type="checkbox"/>	Malacaria, Nancy	JGB Internal Medicine	PRG 1	(JGB Internal Medicine) JIM:AMB	7/1/2012	7/31/2012	<a href="#">(JGB Internal Medicine) AMB Curriculum</a>	4/26/2013 10:14:47 AM

## Duty Hours

- Track duty hours for compliance with the ACGME, AOA, and New York State (IPRO) Duty Hour Rules
- Control basic setup and rule configuration at either the GME or Program level
- Send email reminders to residents to log hours
- Alert Program Directors and other administrators when violations occur
- Monitor compliance and usage using the Duty Hours Dashboard and Reports:
  - Weekly Usage Report
  - General Usage Summary
  - Hours Logged Report
  - Compliance Report
  - Violations Report
  - Program Information Report (PIF)

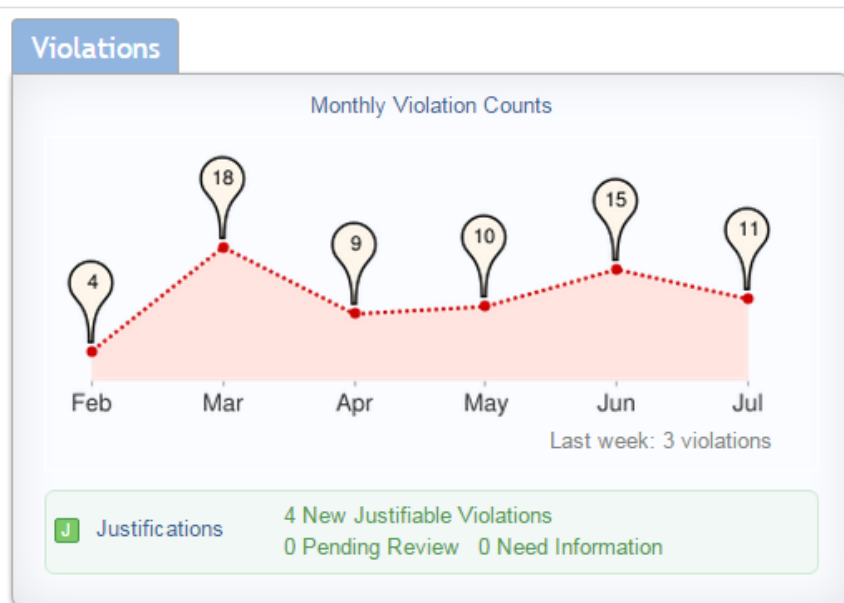
## Duty Hour Dashboard



### ***Duty Hours>Dashboard***

#### Violations Panel

This panel gives you trending information about violations in your department for the past six months and a count of violations that occurred in the last week. Below the chart is a list of information about Justifications entered prior to 7/1/2017. This panel lets you know if there is any action to take.


Click on the panel to reveal the report.






7/2/2015  to 7/29/2015  View Report

Last Week | [Current Month](#) | [Last Month](#)

Violations

 Justifications

Trends

Name	Status	Rule	Description	Comments	Duty Type	Log
Benn, Jason	PRG 2	 <a href="#">ACGME Short Break</a>	Only 5 Hrs Off Between Jul 6 2014 11:00PM And Jul 7 2014 4:00AM. Must Have 8 Hrs.		Call	7/7 AM
Benn, Jason	PRG 2	<a href="#">ACGME EM Day Off</a>	No days off found between 07/01/2014 and 07/08/2014		Call	7/7 AM
Douglas, Amy	PRG 1	<a href="#">ACGME Short Break</a>	Only 9 Hrs Off Between Jul 23 2014 10:00PM And Jul 24 2014 7:00AM. Should Have 10 Hrs.		Conference	7/2 AM
Khalil, Mary	PRG 1	<a href="#">ACGME Short Break</a>	Only 8 Hrs Off Between Jul 4 2014 7:00PM And Jul 5 2014 3:00AM. Should Have 10 Hrs.		Other	7/5 AM
Miller, Christy	PRG 2	 <a href="#">ACGME Short Break</a>	Only 6 Hrs Off Between Jul 19 2014 6:00PM And Jul 20 2014 12:00AM. Must Have 8 Hrs.		EM Shift	7/2 12:00
Miller, Christy	PRG 2	<a href="#">ACGME-EM Short Break</a>	Not enough time off between Emergency Medicine activities. Should have 12 hrs.		EM Shift	7/2 12:00
Ramirez, Melissa Caroline	PRG 2	 <a href="#">ACGME Short Break</a>	Only 7 Hrs Off Between Jul 27 2014 12:00AM And Jul 27 2014 7:00AM. Must Have 8 Hrs.		EM Shift	7/2 AM
Ramirez, Melissa Caroline	PRG 2	<a href="#">ACGME-EM Short Break</a>	Not enough time off between Emergency Medicine activities. Should have 12 hrs.		EM Shift	7/2 AM
Wells, Ronald	PRG 1	<a href="#">ACGME Short Break</a>	Only 7 Hrs Off Between Jul 6 2014 12:00AM And Jul 6 2014 7:00AM. Must Have 8 Hrs.		EM Shift	7/6 AM
Wells, Ronald	PRG 1	<a href="#">ACGME-EM Short Break</a>	Not enough time off between Emergency Medicine activities. Should have 12 hrs.		EM Shift	7/6 AM

Report generated on 7/29/2015 11:14 AM

Violations are listed for the date range at the top. You can change the date range to see violations from last week, this month and last month.

On the report, you can see the person's name, status, and rotation as well as violation information including the rule that was violated, a description of what happened, comments made and the duty type and log date of the violation. You can click the rule to drill down to see the actual logs that are associated with the violation.

This report can be customized by clicking Report Setup in the top right. You can filter by rule, department, status, and location and show rotators and log details.

## Usage Panel

This panel is divided into 6 smaller panels, representing this week and the past five weeks. Each week has three lines of information. The first one indicates how many of your residents have no log activity. It is represented by red, alerting you that this may be a problem area. The first line is residents who have not logged their duty hours this week. Then we have the yellow line, which shows residents have logged their duty hours for three days or less. And then the final line in green tells us how many residents have four or more days with logs.



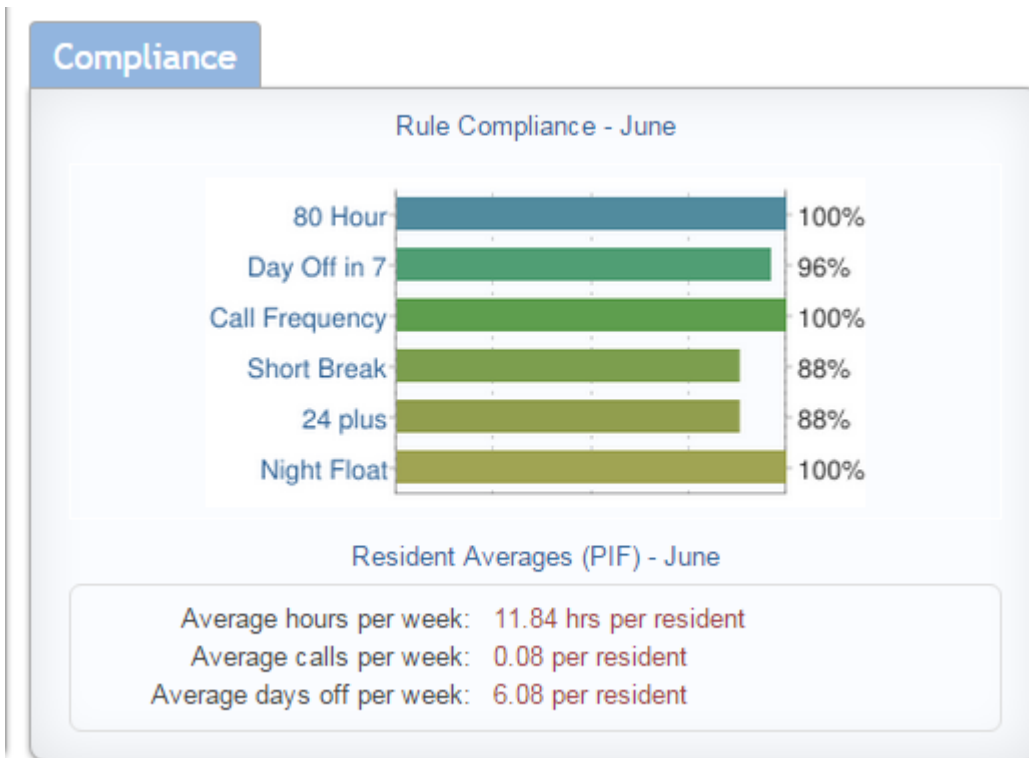
Click one of the weeks to go to the Weekly Usage Monitor. This report lets you see the number of hours each person has logged for each day of a week, and also clearly see who hasn't recorded any duty hours for specific days.


Weekly Usage Report						
7/26/2015 to 8/1/2015		<input checked="" type="radio"/> Current week	<input type="radio"/> Last week	<input type="radio"/> 2 weeks ago	<input type="radio"/> 3 weeks ago	<input type="radio"/> 4 weeks ago
Person	Rotation	Sun	Mon	Tue	Wed	Thurs
Adams, Betsy Lynn	EM:EM:VA					
Agarwal, Needha	EM:EM	12	12		12	
Arshid, Balal Mounir	EM:EM		10		12	
Benn, Jason	EM:EM		12	12		
Browning, Daniela	EM:EM:VA	7	12		12	
Caputo, Eric Matthew	EM:EM:VA		12		12	

You can also email someone directly from this report which is sent immediately instead of the next morning. If you don't see an email icon for a person that means they do not have a primary email address in personnel data.

## Compliance Panel

- A breakdown of resident compliance for each duty hour rule for the last completed rotation. The previous month is displayed. Click this section to go to the Compliance Report which shows today and the last 27 days (28 days total).
- The Program Information summary, which includes the average hours per week per resident, the average calls per week and the average days off per week for the past four weeks. This information can be used to complete a Program Information Form (PIF Report).



6/29/2015  to 7/28/2015  [View Report](#)  [Report Setup](#)

Group By Department or Rotation | Filter By Person

ACGM Violations

Department	Rule Compliance						80Hr	Off	Call	NF	24+	SB
Emergency Medicine	80hr 27/27 = 100% Call 27/27 = 100% Off 26/27 = 96% 24+ 27/27 = 100% SB 20/27 = 74% NF 27/27 = 100%							1				10
Rotation	Check Period	Hrs/Wk	Call	Off/Wk	Off	V	80Hr	Off	Call	NF	24+	SB
PRG 1 Adams, Betsy Lynn												
EM VA	<a href="#">7/1/2015 - 7/31/2015</a>	0	q0	7	31	0						
PRG 1 Arshid, Balal Mounir												
EM	<a href="#">7/1/2015 - 7/31/2015</a>	51.94	q0	2.48	11	0						
PRG 1 Benn, Jason												
EM	<a href="#">7/1/2015 - 7/31/2015</a>	56.45	q15.5	2.71	12	0		1				1



## Evaluations Module

### Personnel and Rotation Evaluations

- Create secure evaluation forms
- Link the forms to rotations for automatic distribution based on the rotation schedule
- Set parameters:
  - Evaluators and subjects
  - Distribution and due dates
  - Automatic email notification schedules
  - Anonymity levels
  - Electronic signatures with date and time stamps
  - Matching methods
- Allow users to create 'on-demand' evaluations
- Manage evaluations in one place:
  - Monitor progress
  - Research issues
  - Edit and delete evaluations
  - Facilitate the evaluation process
- Configure and generate evaluation reports
- View lists of evaluations by their status: completed, delinquent, on-hold, and pending signatures

## Evaluation Reports - Faculty View/Resident View


### ***Evaluations>Reports***

Faculty members can view the results of evaluations completed about them if the session settings allow the faculty (subject) to see their results.

### Overall Report

This report displays the following information:

- Name of the evaluation form
- Question text
- Their average on that question
- The Minimum and Maximum scores received, along with the Standard Deviation
- Check the box for 'Scoring Details' to view a graphic representation of the results



**Kollar, Dotti**  
 Evaluated 11 times  
 Has completed 27 evaluations  
 Rotation Data...

7/1/2014 - 6/30/2015 +
 [View PDF](#)

**Overall** | [Tags](#) | [Comments](#) | [Grading Profile](#) | [Compliance](#) | [Exportable Data](#)

☒ **Comments**
☐ **Scoring Details**

**Form: Resident Evaluation of Faculty**

**Attending provides adequate supervision during rotation.**

Grade Scale	Average	Peer Average	Minimum	Maximum	Standard Deviation
Poor - Excellent	4.55	0	4	5	0.52

**Attending provides adequate supervision during transitions in care.**

Grade Scale	Average	Peer Average	Minimum	Maximum	Standard Deviation
Poor - Excellent	4.64	0	4	5	0.50

## Other Reports

Faculty members can also select the following Tabs to view evaluation results:

- **Tags** – Displays evaluation results from questions that have been ‘tagged’ to a Custom Tag
- **Comments** – Shows comments made by evaluators
- **Grading Profile** – Displays the faculty member’s average score given for each question and the average score given by other faculty members
- **Problems** – If configured, this page shows two areas:
  - Questions receiving low scores – Results from questions marked to give Low Score notifications
  - Questions scoring below 25% - Results that fall below a certain percentage (Select other percentages from dropdown list)
- **Compliance** – Shows compliance rates for completing evaluations assigned to you
- **Exportable Data** – Displays the actual scores given by evaluators

## Confidential Comments to the Program Director

Confidential Comments is a feature that allows evaluation participants to leave a note on an evaluation form that can only be accessed by the subject's Program Director. No one other than the PD has access to view the comments, including L5 and L6 users.

For this feature to be available, these things must be in place:

- The PD's name is listed in the program's personnel section in *Administration*.
- The subject of the evaluation is a resident or fellow with a current training record

The subject can add confidential comments if they are required to sign the form.

This option is in the Evaluation Forms tab of a session where the subjects are resident or fellow statuses.

The screenshot shows the 'Evaluation Form' tab in a software interface. The 'Current Evaluation Form' is set to 'Peer to Peer Evaluation 09/17/2009'. Below this, there is a table with two rows: 'Faculty Evaluation of Resident' and 'Peer to Peer Evaluation 09/17/2009'. A red arrow points to the 'Comments' section below the table. The 'Comments' section has a checkbox 'Allow confidential comments to the subject's program director' which is checked. Below this checkbox are three radio button options: 'Email program director with comments', 'Email program director without comments', and 'No Email'. The 'Signatures' section below has a table with two columns: 'Signers' and 'Applies to'. The 'Signers' column has a row with 'The Evaluator' and a red 'X' icon. The 'Applies to' column has a row with a hyphen. The 'Anonymity Settings' section at the bottom has four radio button options: 'None - Evaluator identity is visible for anyone who may view the evaluation', 'Subject Anonymity - Evaluator identity is hidden from the subject', 'Elective Anonymity - Evaluator may choose whether their identity is hidden from the subject', and 'Total Anonymity - Evaluator identity is removed after submission'.

- When checked, you have the option to notify the PD when a confidential comment is submitted.
  - Check the box to allow confidential comments.
  - Choose to send a notification to the PD with or without the comments included in the notification.

### Comments

- ☒ Allow confidential comments to the subject's program director
  - ☐ Email program director with comments
  - ☐ Email program director without comments
  - ☒ No Email

**IMPORTANT NOTE:** The text box for Confidential Comments to the Program Director is always available on the form for the evaluator. It is only available to the subject if they are required to sign the evaluation.

1. Go to *Evaluations > View Evaluations*
2. Click the Program Director Comments Tab.

## View Program Director Comments

Completed

Program Director Comments

Filter by Year All ▼



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

▲	All	▲
○	08/01/2011-08/31/2011 NBME - APB evaluation of Resident	▼
▼		
1 Selected:		

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

▲	All	▲
○	Antonucci, Michael	▼
▼		
1 Selected:		

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

▲	All	▲
○	Abrams, Justin	▼
▼		
1 Selected:		

Attention! When viewing/printing evaluations, no more than 50 items may be selected at one time.

[View List](#)

## View High/Low Scores Evaluations

**Go to Evaluations > View Evaluations**

1. Click the **High/Low Scores** tab
2. Select your Academic Year
3. Select your Interval (Optional)
4. Check the box to **Include Low Scores**
5. Check the box to **Include High Scores**
6. Check the box to **Include Archived Sessions**
7. Select your Session
8. Select your Evaluator
9. Select your Subject
10. Click **View List**

High/Low Scores

CompletedDelinquentNETOn HoldPending SignaturesHigh/Low ScoresEval Status ListProgram Director Comments

Filter Report

Dates & Scores

Academic Year: 2012-2013Interval: JulyInclude Low ScoresInclude High ScoresInclude Archived Sessions

Sessions, Evaluators & Subjects

AllNoneInsertSessions

AllNoneInsertEvaluators

AllNoneInsertSubjects

View List

High/Low Scores Report: 7/1/2012 to 7/31/2012 + Low Scores + High Scores

View Evaluations | Print Evaluations to PDF

Drag a column header and drop it here to group by that column

Evaluator	Subject	Rotation	Session	Start	Stop	Due	Submitted
<input type="checkbox"/> Atkins, Chet	Wells, Ronald		2012 - 2013 Faculty Evaluation of Resident (Emergency Medicine)	7/1/2012	7/31/2012	8/3/2012	4/1/2013
<input type="checkbox"/> Benn, Jason	EM&URN	EM&URN (Emergency Medicine)	2012-2013 Resident Evaluation of Rotation (Emergency Medicine)	7/1/2012	7/31/2012	8/3/2012	8/21/2012
<input type="checkbox"/> Kurlinski, Daniel	EM&URN	EM&URN (Emergency Medicine)	2012-2013 Resident Evaluation of Rotation (Emergency Medicine)	7/1/2012	7/31/2012	8/3/2012	8/21/2012

## View Delinquent Evaluations

View the evaluations that have been assigned to evaluators that are past their Due Date. Evaluations are considered 'delinquent' if they are not completed by midnight of the day they are due. Administrators also have the option to send delinquent emails from this page to the evaluators.

### **Evaluations > View Evaluations>Delinquent Tab**

1. Select your date range
2. Select your Session
3. Select your Evaluators
4. Select your Subjects
5. Click **View List**

Delinquent Evaluations

Completed Delinquent NET On Hold Pending Signatures High/Low Scores Eval Status List Program Director Comments

Filter by Year: 2013 - 2014 Start Date: 7/1/2013 End Date: 6/30/2014

All | None | Invert | Sessions

All | None | Invert | Evaluators

All | None | Invert | Subjects

Include Archived Items

Attention! When viewing/printing evaluations, no more than 50 items may be selected at one time.

[View List](#) [View Delinquent Evaluations](#) | [Send Delinquent Email](#)

All | None | Invert

Evaluator Name	Rotation/Subject Name	Rotation	Session Name	Start Date	Stop Date	Session Due Date
<input checked="" type="checkbox"/> Benson, Wayne	Buchanan, Jeff James	JIM:WARD - 1-MH (JGB Internal Medicine)	Faculty Evaluation of Resident (JGB Internal Medicine)	7/1/2013	7/31/2013	8/3/2013
<input checked="" type="checkbox"/> Brooks, Maggie	Durbin, Nancy Lee	JIM:WARD - 2-MH (JGB Internal Medicine)	Resident Evaluation of Faculty (JGB Internal Medicine)	9/1/2013	9/30/2013	10/3/2013
<input checked="" type="checkbox"/> Brooks, Maggie	Brooks, Alma	JIM:WARD - 2-MH (JGB Internal Medicine)	Resident Evaluation of Faculty (JGB Internal Medicine)	9/1/2013	9/30/2013	10/3/2013

### **Notes:**

- Check the box in front of an evaluation and click **Send Delinquent Email** to send a reminder to the evaluator.
- Evaluations marked with \*\* are saved as a draft.
- Evaluations marked with an 'A' are from an administrative session and cannot be completed by the evaluator.

## View Completed Evaluations

**Evaluations > View Evaluations>Completed Tab (default)**

1. Select the date range
2. Select the Session
3. Select the Evaluators
4. Select the Subjects
5. Click **List All Evaluations**

View Completed Evaluations

Completed Delinquent NET On Hold Pending Signatures High/Low Scores Eval Status List Program Director Comments

Personal Listing

Filter by Year 2013 - 2014 Start Date 7/1/2013 End Date 6/30/2014

All | None | Invert | Sessions

All | None | Invert | Evaluators

All | None | Invert | Subjects

07/01/2013-07/31/2013 Faculty Evaluation of Resident  
07/01/2013-07/31/2013 Milestones  
07/01/2013-07/31/2013 Resident Evaluation of Faculty  
07/01/2013-07/31/2013 Resident Evaluation of Rotation  
08/01/2013-08/31/2013 Faculty Evaluation of Resident  
09/01/2013-09/30/2013 Faculty Evaluation of Resident  
10/01/2013-10/31/2013 Faculty Evaluation of Resident

1 Selected:

Benson, Wayne A  
Brooks, Maggie  
Durbin, Nancy Lee  
Imdorf, Nancy Lynne  
Jones, Anna  
Tirrell, Robin Lynne

1 Selected:

Benson, Wayne A  
Brooks, Maggie  
Gomez, Maria  
Lemon, Julie  
Parke, Brenda

1 Selected:

Include Archived Items

Attention! When viewing/printing evaluations, no more than 50 items may be selected at one time.

[List New Evaluations Only](#) | [List All Evaluations](#)

[View selected evaluations](#) ☐ Do not mark evaluations as viewed

[Print selected evaluations to PDF](#) ☐ Set as the "Printed" date

[Return selected evals to 'On Hold'](#) ☐ Include Category Summary

☐ Hide evaluation form instructions ☒ Hide identifying information in the header of the anonymous evaluations

Residency Evaluations

All | None | Invert

Evaluator Name	Rotation/Subject Name	Rotation	Session Name	Start Date	Stop Date	Session Due Date	
<input type="checkbox"/> Benson, Wayne <a href="#">Previously Viewed</a>	Brooks, Maggie	JIM:WARD - 1-MH (JGB Internal Medicine)	Milestones (JGB Internal Medicine)	7/1/2013	7/31/2013	8/3/2013	<a href="#">Edit Evaluation</a>
<input type="checkbox"/> Benson, Wayne <a href="#">Signature Missing</a>	Brooks, Maggie	JIM:AMB-MH (JGB Internal Medicine)	Faculty Evaluation of Resident (JGB Internal Medicine)	8/1/2013	8/31/2013	9/3/2013	<a href="#">Edit Evaluation</a>
<input type="checkbox"/> Benson, Wayne	Brooks, Maggie	JIM:WARD - 1-MH (JGB Internal Medicine)	Faculty Evaluation of Resident (JGB Internal Medicine)	7/1/2013	7/31/2013	8/3/2013	<a href="#">Edit Evaluation</a>
<input type="checkbox"/> Brooks, Maggie	JIM:WARD - 1-MH	JIM:WARD - 1-MH (JGB Internal Medicine)	Resident Evaluation of Rotation (JGB Internal Medicine)	7/1/2013	7/31/2013	8/3/2013	<a href="#">Edit Evaluation</a>
<input type="checkbox"/> Brooks, Maggie <a href="#">Previously Viewed</a>	Benson, Wayne A	JIM:WARD - 1-MH (JGB Internal Medicine)	Resident Evaluation of Faculty (JGB Internal Medicine)	7/1/2013	7/31/2013	8/3/2013	<a href="#">Edit Evaluation</a>
<input type="checkbox"/> Durbin, Nancy	Brooks, Maggie	JIM:WARD - 2-MH (JGB Internal Medicine)	Faculty Evaluation of Resident (JGB Internal Medicine)	9/1/2013	9/30/2013	10/3/2013	<a href="#">Edit Evaluation</a>

## Program Evaluations

- Allow residents and faculty to confidentially evaluate their experience with the Program
- Create program evaluation forms
- Distribute evaluations from the GME level or the program level
- Share forms with all programs to unify reporting metrics
- Send email reminders to evaluators
- Reports:
  - Track Compliance
  - Generate the Evaluation Results Report to see responses and comments, charts and average scores
  - Flag problem areas for follow up

- Use the Problem Resolution Report to track progress and document the resolution process

## Program Evaluations - Progress Report

This report displays the progress completion details for Program Evaluations. You can see if evaluators are completing them and send email reminders to individuals or the entire list of personnel to log in and complete their delinquent evaluations.

### Evaluations > Program Evaluations > Progress

1. Select the academic year
2. Select the program
3. Select statuses to include in the report
4. Click **Apply Filters**

				<a href="#">Contact All Delinquent Evaluators</a>
Name	Completed	Total	Delinquent	
<b>Family Medicine</b> <a href="#">View unmatched people</a>				
PRG 1				
Archer, David A	1	1		
Parke, Brenda	1	1		
Wolf, Becky	0	1	1	
PRG 2				
Aktar, Aboud	1	1		
Julka, Vijay	1	1		
O'Doull, Kathleen	1	1		
PRG 3				
Baker, Thomas Eugene	0	1	1	
Gomez, Maria	1	1		
Wallace, Charles	1	1		
				<a href="#">Export To Excel</a>   <a href="#">Export To PDF</a>





## Program Evaluations - Problem Resolution Report

Once questions are flagged as problems on the Results Report, you can track the problems your program is experiencing using the Program Resolution Report. This report has several dynamic features that allow you to add documentation (files and comments) and indicate when the problem is resolved.

*Evaluations > Program Evaluations > Problem Resolution*

1. Take action on an issue:

- Mark as resolved
- Enter a comment
- Attach a file
- View the Responses
- Delete the problem

Program Problem Resolution Report			
Questions that are flagged as active problem areas			
	Evaluation Form	Question Number	Question Text
▼	Resident Evaluation of Program	1	I believe the Family Medicine program provides residents with outstanding training in the s
Details			
Flagged On	Flagged By	Program	Report Date Range
09/24/2015	NI Personnel	Family Medicine	07/01/2014 - 06/30/2015
 <input type="text"/>  Page 1 of 1			

## Conferences Module

- Manage conferences and didactics details
- Create recurring or individual conference events
- Attach speakers and topics to conferences
- Notify speakers and attendees of upcoming conferences
- Attach relevant files and links to conference events
- Set up attendance requirements
- Build attendance rosters according to the rotation schedules
- Associate core competencies and objectives with conferences
- Take and track attendance for each conference
- Survey attendees to monitor conference and speaker quality
- Generate reports on attendance and survey results

## View Conferences Calendar

### Conferences > Calendar

1. Select View options from the drop-down lists

Pediatric View						
9/30/2012 to 11/11/2012						
Month   Week   Work Week   Day   Year						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	Oct 1	2	3	4	5	6
	1:04p-2:04p Grand Rounds PEDIATRICS GRAND ROUNDS	1:04p-2:04p Grand Rounds PEDIATRICS GRAND ROUNDS	1:04p-2:04p Grand Rounds PEDIATRICS GRAND ROUNDS	1:04p-2:04p Grand Rounds PEDIATRICS GRAND ROUNDS	12:00p-1:00p Grand Rounds PEDIATRICS GRAND ROUNDS	
					1:04p-2:04p Grand Rounds PEDIATRICS GRAND ROUNDS	

## Report by Person

Generate an attendance report on a specific person.

**Conferences > Attendance > Report By Person**

1. Click **View Report**

Totals:				% Attended = Present / (# Required - Excused)							
Person	Dept/Div	Status	Category	# Conferences	# Required	Present	Tardy	Excused	% Required	% Attended	% Credit Hrs Earned
Agrawal, Roberta L	Pediatrics	PRG 3	Pediatrics :: Grand Rounds	44	44	44	0	0	100%	100%	
Totals:				44	44	44	0	0	-	100.00%	N/A
Broderick, Cathryn Ruth	Pediatrics	PRG 1	Pediatrics :: Grand Rounds	3	3	3	0	0	100%	100%	
Totals:				3	3	3	0	0	-	100.00%	N/A
Bute, Samir	Pediatrics	PRG 1	Pediatrics :: Grand Rounds	53	53	53	0	0	100%	100%	
Totals:				53	53	53	0	0	-	100.00%	N/A
Bute, Samira	Pediatrics/Neonatal Medicine	PRG 3	Pediatrics :: Grand Rounds	3	3	3	0	0	100%	100%	
Totals:				3	3	3	0	0	-	100.00%	N/A
Castro, Christine	Pediatrics/Neonatal Medicine	PRG 3	Pediatrics :: Grand Rounds	3	3	3	0	0	100%	100%	
Totals:				3	3	3	0	0	-	100.00%	N/A
Conti, Maria Victoria	Pediatrics	PRG 3	Pediatrics :: Grand Rounds	3	3	3	0	0	100%	100%	
Totals:				3	3	3	0	0	-	100.00%	N/A
Smith, Jamie	Pediatrics	PRG 2	Pediatrics :: Grand Rounds	3	3	3	0	0	100%	100%	
Totals:				3	3	3	0	0	-	100.00%	N/A
Grand Totals				112	112	112	0	0	-	100.00%	N/A

# Portfolio Module

## Milestones

- Designate your Clinical Competency Committee (CCC)
- Complete Milestone Reviews on your residents and fellows every six months (Published milestones only)
- Provide evaluation feedback to your CCC
- Include milestone language on your evaluations
- View Milestone Reports:
  - Personal Progress Report
  - Peer Averages Report
  - ADS Report

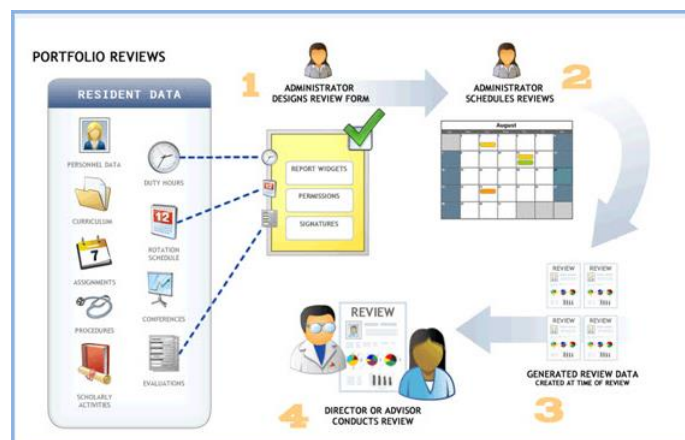
## Portfolio Reviews

### ***Portfolio>Reviews***

The Portfolio module is an application that is designed to contain and organize evidence of learning. It can also show that residents and fellows are working towards goals and objectives set by their programs. Program administrators can configure the module to capture the information pertinent to their programs.

The Portfolio Reviews feature is a centralized reporting tool used to gather resident performance data from many areas of the software. Portfolio Reviews were designed to facilitate semi-annual Program Director reviews and quarterly Advisor Reviews of resident and fellow performance. 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 Review Process**





## Scholarly Activities

### *Portfolio>Scholarly Activities*

- Setup online forms to collect detailed information for different types of scholarly activity
- Record scholarly achievements, activities and upload external documents
- Contribute to the activities of others and share activities with other users
- Notify scholarly activity contributors of pending contributions
- Generate reports for all department personnel by activity, competency or ADS category
- The Scholarly Activity module enables users to document the wide range of details involved in tracking progress and participation in scholarly activities. 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.

**New Innovations**

**Local or Regional Presentations**

**Activity Description:** Presenter - Oral

**Presenter(s):** Brooks, Scott

**Title of Presentation:** Knowledge Translation & EM: Bridging the Gap

**Meeting Sponsor:** SAEM

**Date:** 3/6/2005

**City:** New York

**Core Competencies**

{none}

**Upload Files**

{none}

**Contributors**

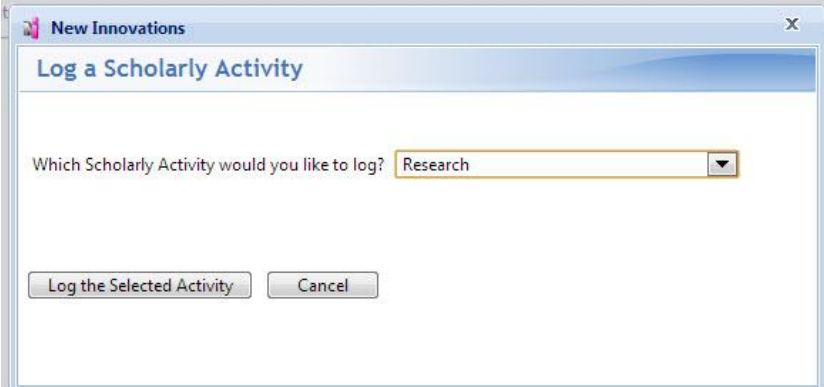
Name	Accepted
Scott Brooks	Yes

## 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.

Click **New**

1. Select the type of Scholarly Activity you wish to log
2. Click **Log the Selected Activity**
3. Complete the entries
4. Click **Save**



The screenshot shows a window titled "New Innovations" with a sub-header "Log a Scholarly Activity". Inside the window, there is a text prompt "Which Scholarly Activity would you like to log?" followed by a dropdown menu currently showing "Research". At the bottom of the window, there are two buttons: "Log the Selected Activity" and "Cancel".

## 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



The screenshot shows a form with three fields: "Activity Description" containing "Review Article", "Activity Date" containing "10/4/2016" with a calendar icon, and "PubMed Search" containing the text "PubMed" which is underlined in blue. A mouse cursor is pointing at the "PubMed" link.

## 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.

## Scholarly Activities - ADS 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

#### *Portfolio > Activity Reports*

1. Click the **ADS Categories** tab
2. Select a date range and program
3. Select **Core Faculty** or **Residents**
4. Click **Generate Report**

#### Scholarly Activity ADS Category Report

Activities

Totals By Competency

Totals By Activity

ADS Categories

Dates:

7/1/2013

to

6/30/2014

Generate Report

Show Advanced Filters

Faculty	PubMed IDs	Conference Presentations	Other Presentations	Chapters / Textbooks	Grant Leadership	Leadership or Peer-
Benson, Wayne		0	0	1	1	N
Durbin, Nancy		0	2	1	1	N
Spino, Teresa		0	0	1	0	Y



## Journaling

- Create journal assignments and assign to residents
- Specify key educators to approve or sign off on a journal assignment
- Facilitate dialogue through commenting by authors, reviewers, advisors or administrators
- Send notifications when new comments are added to a journal entry someone is associated with, new journal assignments are available or a journal is ready for review
- Send emails reminding people to complete or review assignments

## Creating Journal Assignments

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

### **Portfolio > Assignments**

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

The screenshot shows a web form titled "New Journal Assignment". It is divided into several sections:

- Monthly Reflection**: A text area with instructions: "Describe two events that happened this month: 1. An event where you shined! Your knowledge, practice and/or communication skills were used to help a patient and/or their family. 2. An event where you felt inadequately prepared to handle the situation. Describe what happened, what you learned and how you'll handle this type of situation differently in the future."
- People**: A section with a link "Select the people who should complete this assignment."
- Journal Entries & Due Dates**: A section with a text input "One entry is due on" followed by a date picker, and a link "Add another journal entry".
- Core Competencies**: A section with a note "Completing this journal assignment displays competency in Practice-Based Learning and Improvement" and a list of checkboxes for "Advisor", "Program Director", and "Associate Program Director".
- Assignment Approval**: A section with a note "Does this assignment need to be approved? If so, select the reviewers." and checkboxes for "Advisor", "Program Director", and "Associate Program Director". Below this is a note: "Assignment is considered approved after only one person approves it."

At the bottom of the form are "Continue" and "Cancel" buttons.

# Logger Module

## Procedure Logger







- Track data about procedures residents perform
- Design your own procedure log form
- Create procedure and diagnosis lists by program
- Use the confirmation process to automatically credential residents in required procedures
- Offer lists of credentialed residents to nurses
- Import procedures from ACGME's Case Logger for reporting purposes
- Generate reports:
  - Resident Report
  - Advisor Report
  - Supervisor Report
  - Extract data

## Trainee Summary Report

This Procedure Logger report displays a complete record of procedures logged in your program for current and past residents. You can view your residents by training year, plus drill down to find the details for each resident and procedure. Residents must have a Training Record in their Personnel file to appear on this report (active or archived)

### **Logger > Resident Reports**

1. Click **Trainee Summary**. The report displays a list of your current trainees grouped by 'Year in Residency.'
2. The Total Logged column includes all procedures logged, not just those in the current program.

Trainee Summary			
Emergency Medicine -			
Active Trainees 2014-2015 [Primary] +			
1st Year in Residency	Total Logged	Passed	Not Passed
 Adams, Betsy PRG 1 PGY-1	11	11 (100%)	0 (0%)
 Arshid, Balal PRG 1 PGY-1	12	11 (92%)	0 (0%)
 Douglas, Amy PRG 1 PGY-1	11	11 (100%)	0 (0%)
 Khalil, Mary PRG 1 PGY-1	11	11 (100%)	0 (0%)
 Rogers, Billy PRG 1 PGY-1	1	0 (0%)	0 (0%)
 Smith, Darlene PRG 1 PGY-1	0	0 (0%)	0 (0%)

- Click **Current Trainees** to select a different academic year and display the list of trainees that were active during the year selected. Using this feature lets you look at trainees from past years, even if their record is archived. The residents must have a training record to be able to separate procedures by year, so you may not be able to view resident information before training records were instituted.

Active Trainees 2013-2014 [Primary] +

Current Trainees

Academic Years

Active Trainees 2014-2015 [Primary]

Active Trainees 2013-2014 [Primary]


Active Trainees 2012-2013 [Primary]

More...

7/1/2013 to 6/30/2014

Go

- Click the name of a trainee to display the details about the procedures logged by that resident. When the resident has met the target for a procedure it is shown in green.
- Procedures can be displayed by Group. Click **By procedure** and select **By groups** to display all logs for each group. Click **By Group** to select a single group name and only the procedures belonging to that Group will be displayed. Click **By procedure** again to return to the full list of procedures by that resident.



**Thomas Baker**  
7/1/2013 - 6/30/2016


Procedures logged ▾ By Procedure ▾

Procedure	CPT <sup>®</sup> Code	Logged	Passed	Not Passed	Target	Scope of Supervision	
Abscess I/D		11	11	0	11/5 (100%)	Independent 5/2/2016	>
Arterial line insertion Group: Group A		5	5	0	5/5 (100%)	Independent 5/2/2016	>
Aspiration of cyst Group: Group A		5	5	0	5/2 (100%)	Independent 3/14/2016	>
Cesarean Section Delivery	59514	6	6	0	6/5 (100%)	Independent 2/19/2016	>
C-Section + Group: Group C		10	10	0	10/10 (100%)	Independent 4/25/2016	>
Echocardiogram Group: Group B		5	5	0	5/5 (100%)	Independent 6/2/2016	>
Electrocardiogram Group: Group B		6	6	0	6/5 (100%)	Independent 3/24/2016	>
Foreign body removal Group: Group A		2	2	0	2/3 (67%)	Independent 4/25/2016	>
Vaginal Delivery Group: Group C		22	22	0	22/5 (100%)	Independent 1/12/2016	>

6. Click **Procedures logged** at the top, click on a **Year in Residency** (or Fellowship) to view the details about the logs entered during that specific time period. When the resident has met the independent target for a procedure it is shown in green. Click **Collapse** to hide the details. Any filtering will affect the data shown here, as well.

All Procedures ▾ By Year In Program ▾			
1st Year in Residency			
Procedure	CPT <sup>®</sup> Code	Logged	Passed
Abscess I/D		0	0
Arterial line insertion Group: Group A		0	0
Aspiration of cyst Group: Group A		0	0
Cesarean Section Delivery	59514	0	0

7. Click a specific procedure to view more details about the log. The details for that procedure include:
- A Progress Bar that displays the resident's progress towards the credentialing goal for this procedure
  - A Chart that displays information about the specific procedures logged

<div> <div>Family Medicine</div> <div>  <div> <b>Thomas Baker</b> -  7/1/2013 - 6/30/2016 </div> </div> </div>					
<div> <div>Abscess I/D -</div> <div> Independent (5/2/2016) </div> <div> <div>11</div> <div>5</div> </div> </div>					
Logged Date	Role	Supervisor	Confirmed	Date Confirmed	Passed
4/12/2016	Perform	Wolf, Becky	Yes	5/2/2016	Yes
4/14/2016	Perform	Wolf, Becky	Yes	5/2/2016	Yes
4/18/2016	Perform	Wolf, Becky	Yes	5/2/2016	Yes
4/20/2016	Perform	Wolf, Becky	Yes	5/2/2016	Yes
4/21/2016	Perform	Wolf, Becky	Yes	5/2/2016	Yes

8. Click the arrow to return to the previous screen.

## Procedure Privilege Report

The Privilege Report can be used to verify the level of supervision required for residents when they perform certain procedures. Many institutions make this report available to hospital nurses by giving them level 1 access to the Procedure Logger module. People who have left your program and whose records are not archived as well as Post Training Chief status can be viewed as well.

### **Logger > Privileged Residents > Search**

1. Enter a resident's last name, CPT code, or procedure name in the text box
2. Click **Search**
3. Click the resident's name or the procedure to view privileges
4. Click **Find Personnel** or **Find Procedure** to access the entire list of residents or procedures.



#### **Benn, Jason**

Emergency Medicine  
Program: Emergency Medicine  
Status: PRG 3

Pager: (330) 352-7764

Program Director

#### **Cartman, Jerry**

Phone: (454) 833-3445

Chief/Chair

#### **Krispo, Lew**

Phone: (454) 399-8987

☐ Group by level of supervision

Procedure	CPT® Code	Scope
Arterial Blood Gas		Independent
Arterial Line Placement		Independent

## Log Books

- Create custom logger fields to gather data unique to your institution or program
- Designate who can enter and view the information stored in Log Books
- Generate Log Book Reports

### Creating Log Books

Log Books can be used to collect data that isn't captured in any other module in the software. Create custom fields and then put them together for the Log Book.

#### **Logger > Log Books > Setup > Books tab**

1. Click **New**
2. Enter a name for the log book
3. Select the work roles that can view and log entries to the log book
4. Select the departments that can view and log entries
5. Select the default fields that should be included:
  - a. Include - Makes this an 'Optional' field.
  - b. Make Required - Makes this a 'Required' field for users. They will not be able to save their Log Book until this field is completed.
  - c. Don't Include - This field will not appear in the Log Book.
6. Select the custom fields to 'Include' or 'Make Required' in this log book.
7. Click **Save and Return**
8. Custom Fields can be put into a specific order by using the 'Move Up' and 'Move Down' links after the page has been saved

**Log Books Setup**

Save and Return | Cancel and Return

Log Book Name:

☐ Archive this Log Book

All | None | Invert | Departments and Divisions able to view

- \*GME Department
- AG Internal Medicine
- Anesthesia
- Community Trauma Fellowship
- Dental Medicine
- Department of Medicine
- Department of Medicine/DM-Cardiology
- Department of Medicine/DM-Endocrinology
- Department of Medicine/DM-Gastroenterology
- Department of Medicine/DM-Geriatric Medicine

1 Selected

**Default Fields**

	Default Field Name	Field Type
<input type="radio"/> Include <input checked="" type="radio"/> Make Required <input type="radio"/> Don't Include	Date of Log	Date Box
<input type="radio"/> Include <input checked="" type="radio"/> Make Required <input type="radio"/> Don't Include	Logged By:	Drop-down List
<input type="radio"/> Include <input checked="" type="radio"/> Make Required <input type="radio"/> Don't Include	Status	Drop-down List

**Custom Logger Fields**

	Custom Logger Field Name	Field Type	Field Order		
<input type="radio"/> Include <input type="radio"/> Make Required <input checked="" type="radio"/> Don't Include	Clinical Conditions	Drop-down List	0 (Not Used)	Move Up	Move Down
<input type="radio"/> Include <input type="radio"/> Make Required <input checked="" type="radio"/> Don't Include	Color	Multi-select Box	0 (Not Used)	Move Up	Move Down
<input type="radio"/> Include <input type="radio"/> Make Required <input checked="" type="radio"/> Don't Include	Confirmation Clarification	Radio Buttons	0 (Not Used)	Move Up	Move Down
<input type="radio"/> Include <input type="radio"/> Make Required <input checked="" type="radio"/> Don't Include	Consent	Radio Buttons	0 (Not Used)	Move Up	Move Down

Below is a sample Log Book that was created to allow residents to record data from their Clinic Visits. Your Log Book may appear different depending on your configuration.

Log Books Logs

Create/Edit Clinic Visits Entries

DEFAULT FIELDS

Date of Log

8/4/2014

Logged By

(None Selected)

Status

(None Selected)

CUSTOM FIELDS

Resident Team:

Blue

Gold

Green

Red

Date of Clinic Visit:

Diagnosis:

All | None | Invert

Blocked arteries

Heart murmur

Hypertension

Medications:

Remaining Characters: 5,000

Site:

Supervisors:

All | None | Invert

Leslie, S

Wagner, L

Wilt, A

Save and Retain

Save and Clear

Cancel and Return