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: Emergency Medicine

Agreements

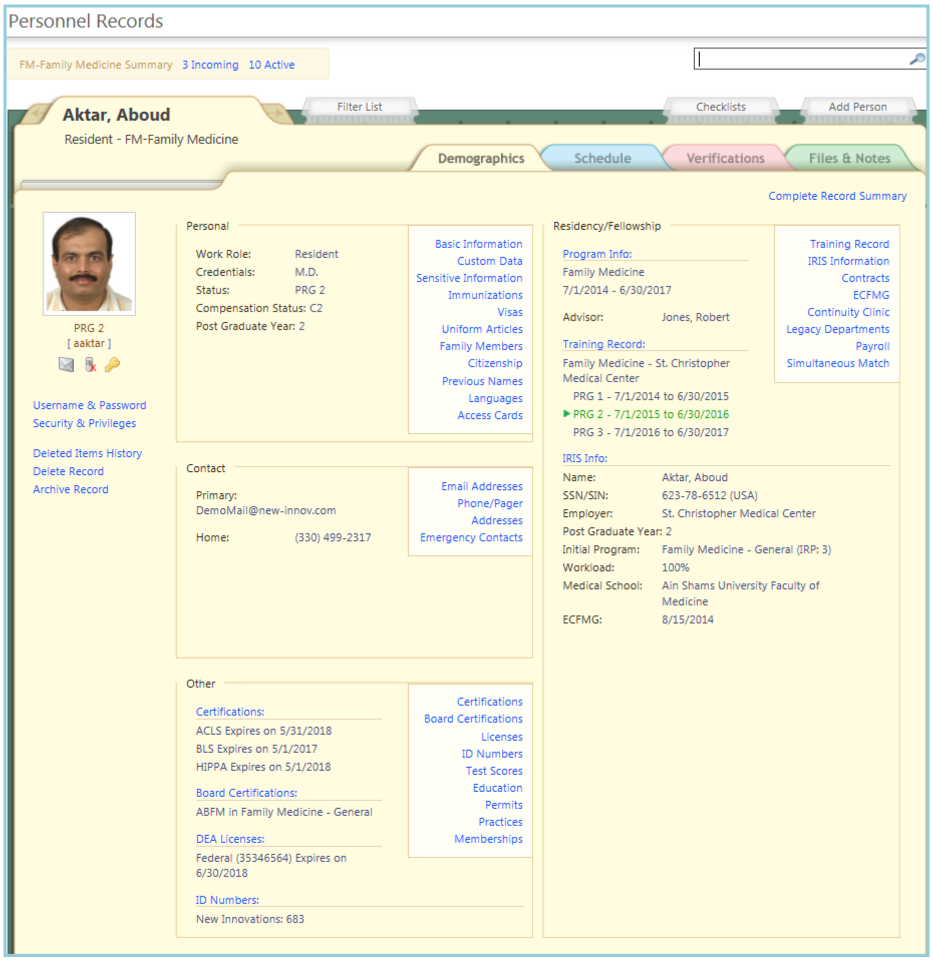
Program	Affiliate Training Location	Agreement Type	Agreement Milestone	Original Approval Date	Current Approval Date	Expires On
Emergency Medicine	City Hospital	NPA				
Emergency Medicine	City Hospital	NPA	Rec'd from PD			
Emergency Medicine	Reed Clinic	PLA	All signatures completed	03/18/2013	03/18/2013	03/31/201
Emergency Medicine	Veterans Hospital	PLA	All signatures completed	05/27/2005	06/13/2008	06/30/201
Emergency Medicine	Veterans Hospital	PLA	All signatures completed (06/02/2013)	06/02/2013	06/02/2013	06/30/201

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.



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 privates notes about each person

Schedules Module

Schedules>Schedule Rotations or View Schedule

Block (Rotation) Schedules

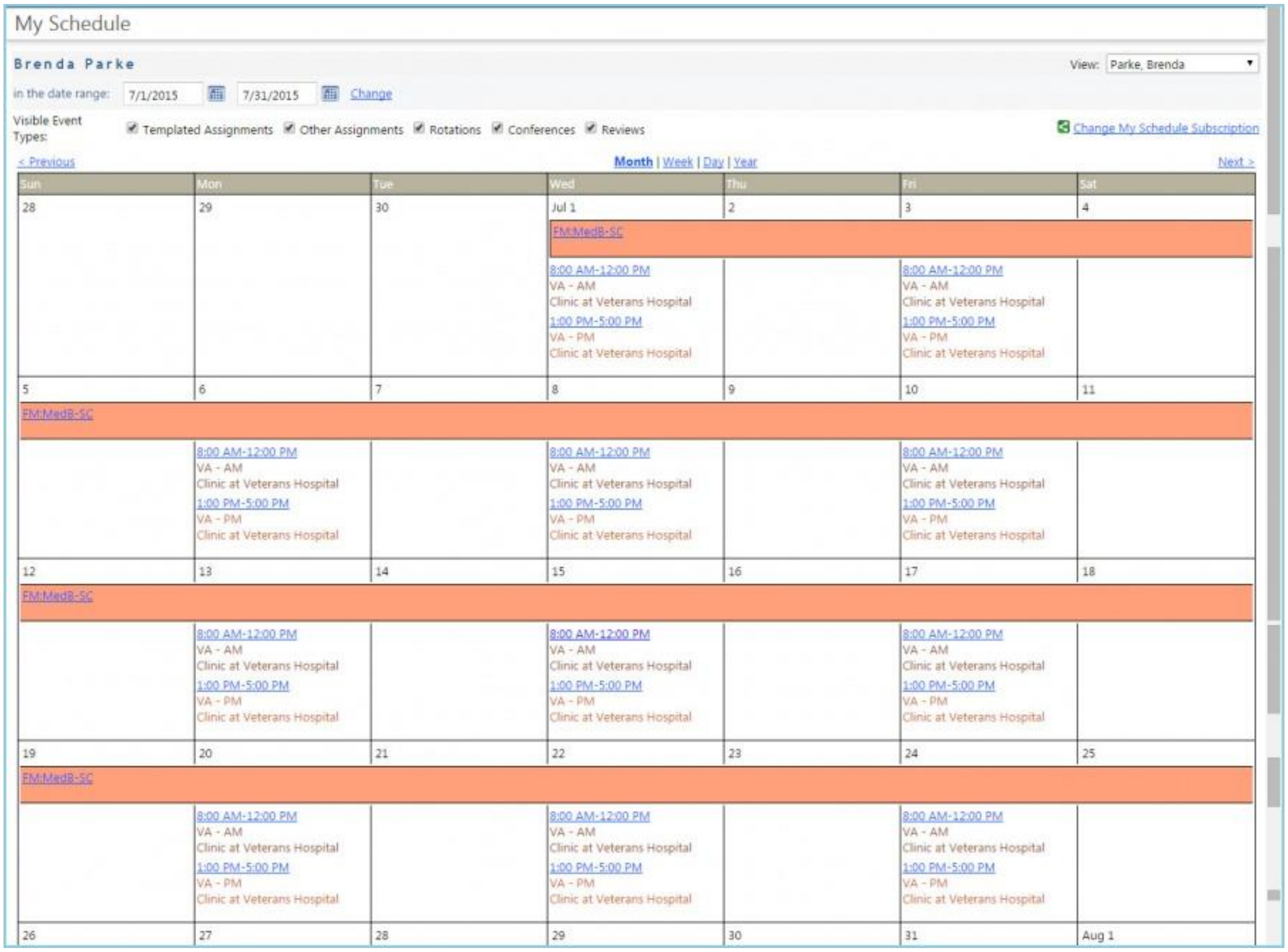
- Create rotation schedules for residents, fellows and faculty and make the details available for viewing
- Create rotation requirements to monitor and track residents' progress through their programs
- Provide custom views for easy access to specific data
- Use rotation schedules to automate evaluations 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:OB & 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

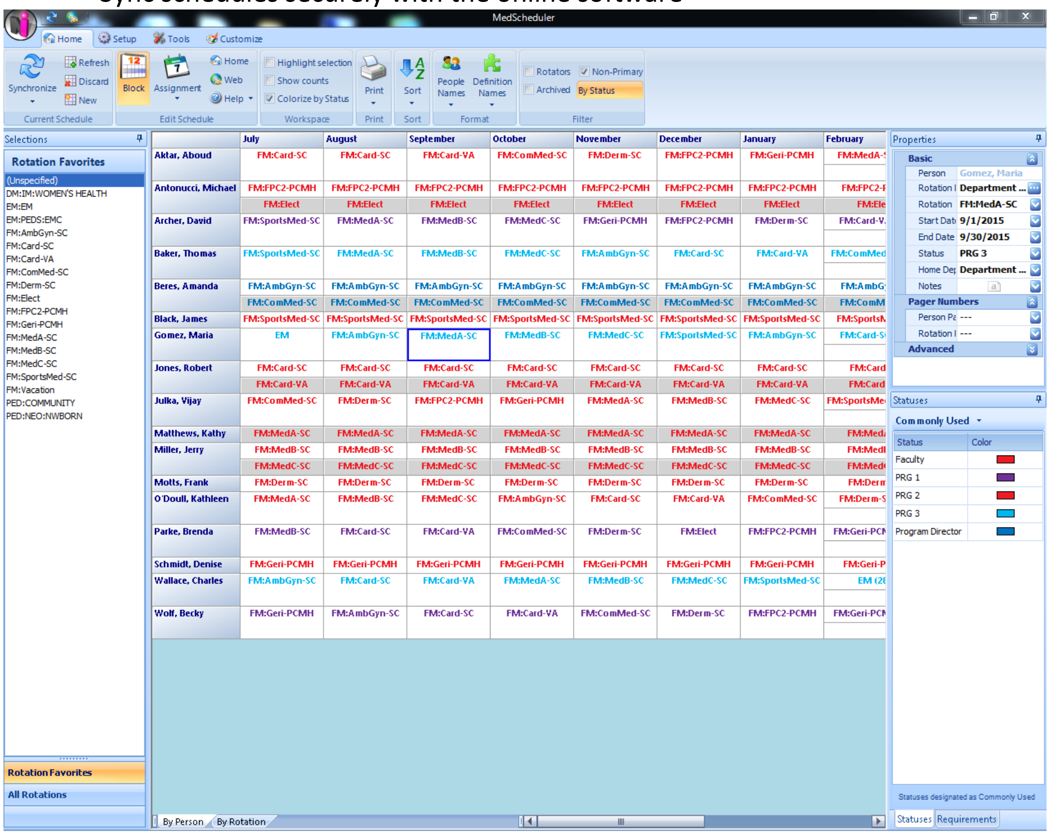
Go to Schedules > Assignment Scheduling > My Schedule

- 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



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



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**

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)

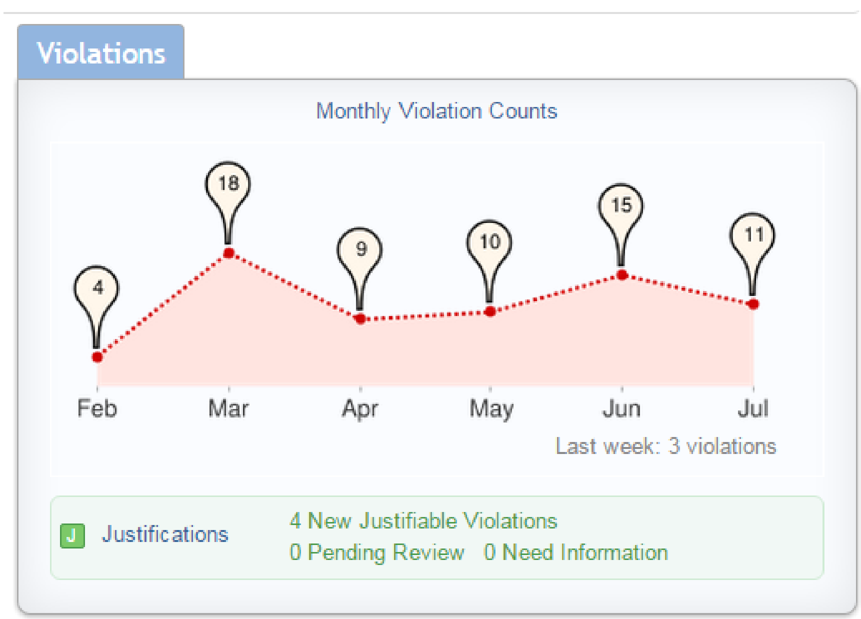
Duty Hour Dashboard

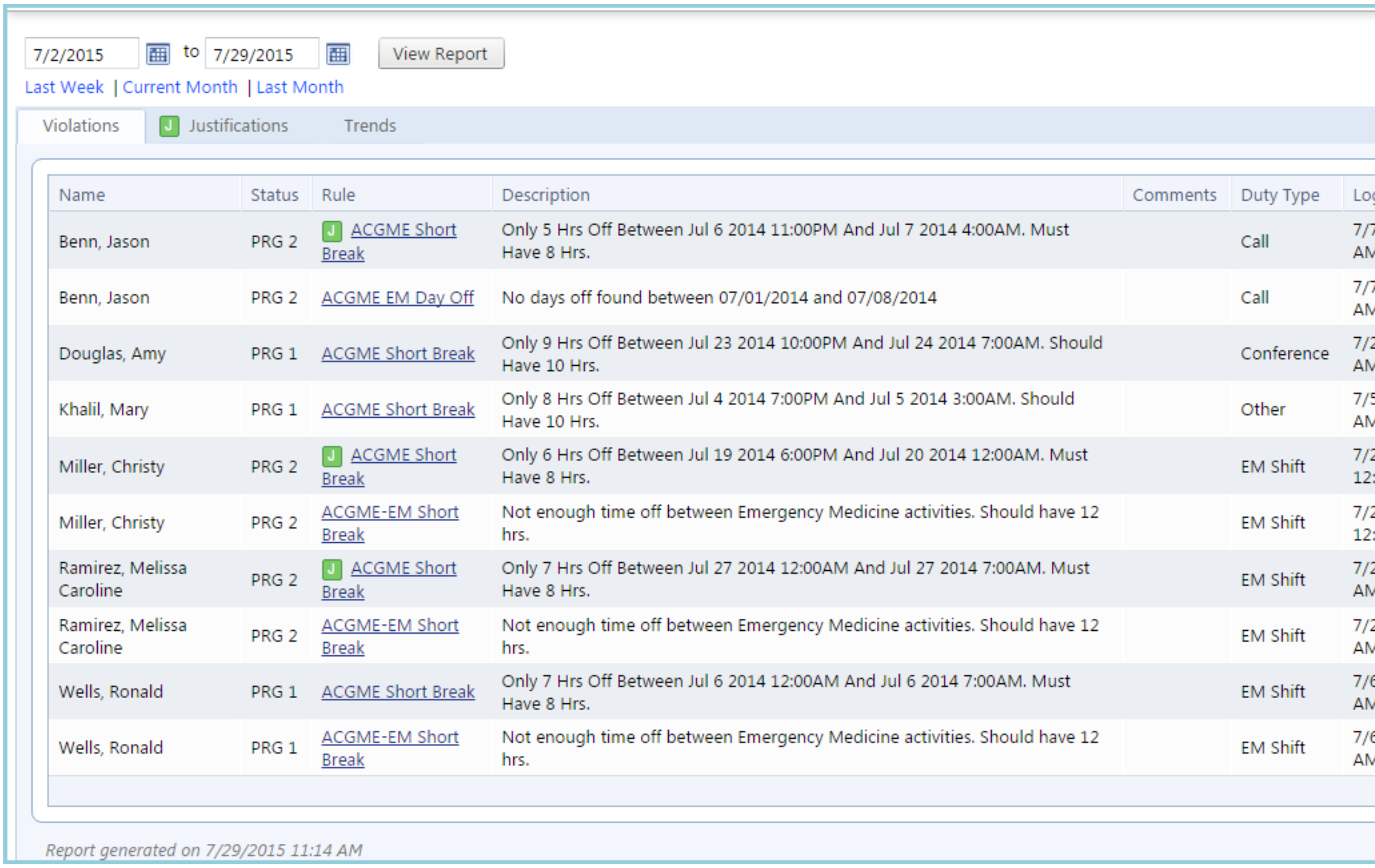
Duty Hours>Dashboard

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.





Name	Status	Rule	Description	Comments	Duty Type	Lo
Benn, Jason	PRG 2	J ACGME Short Break	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	ACGME EM Day Off	No days off found between 07/01/2014 and 07/08/2014		Call	7/7 AM
Douglas, Amy	PRG 1	ACGME Short Break	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	ACGME Short Break	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	J ACGME Short Break	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:
Miller, Christy	PRG 2	ACGME-EM Short Break	Not enough time off between Emergency Medicine activities. Should have 12 hrs.		EM Shift	7/2 12:
Ramirez, Melissa Caroline	PRG 2	J ACGME Short Break	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	ACGME-EM Short Break	Not enough time off between Emergency Medicine activities. Should have 12 hrs.		EM Shift	7/2 AM
Wells, Ronald	PRG 1	ACGME Short Break	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	ACGME-EM Short Break	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

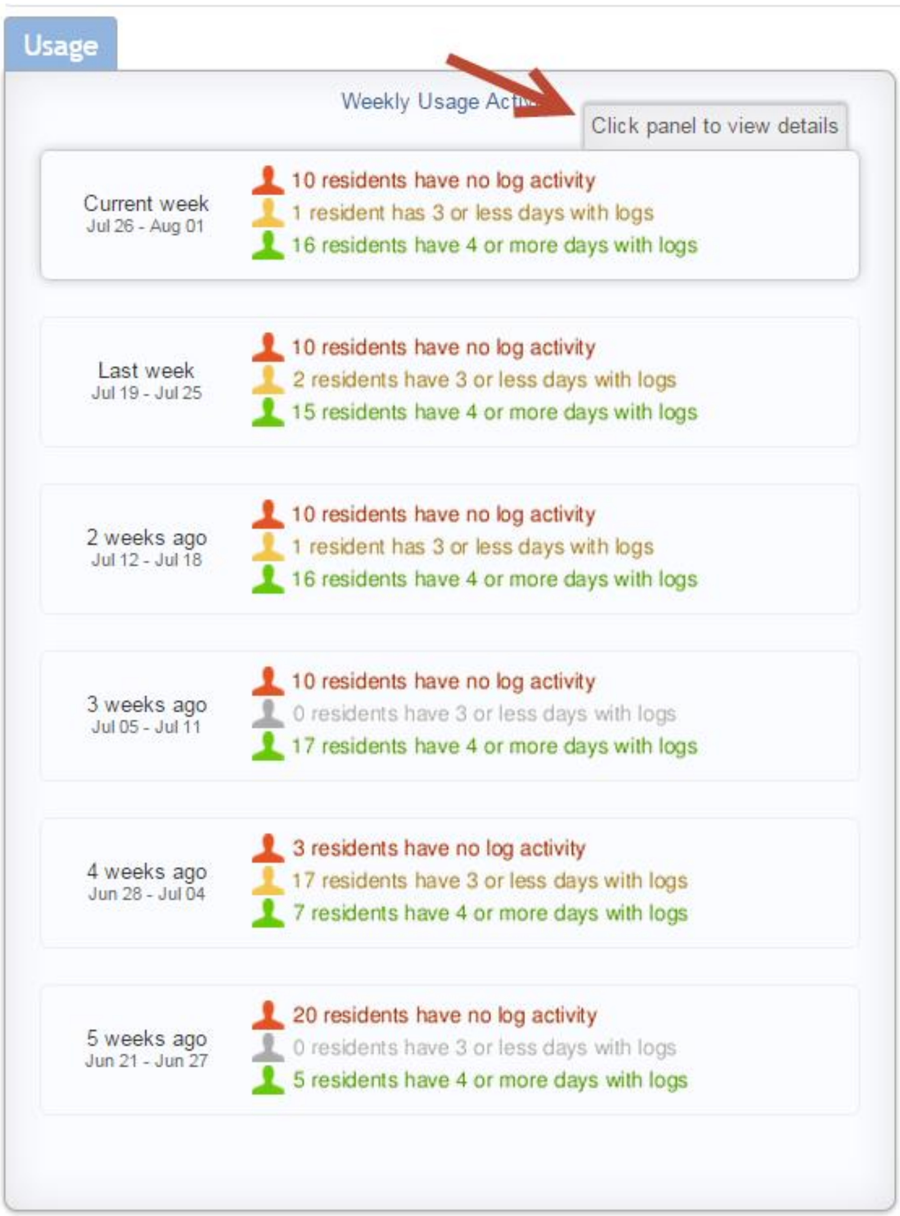
Violations are listed for the date range at the top. You can change the date range to see violations from last week, this month and last month.

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

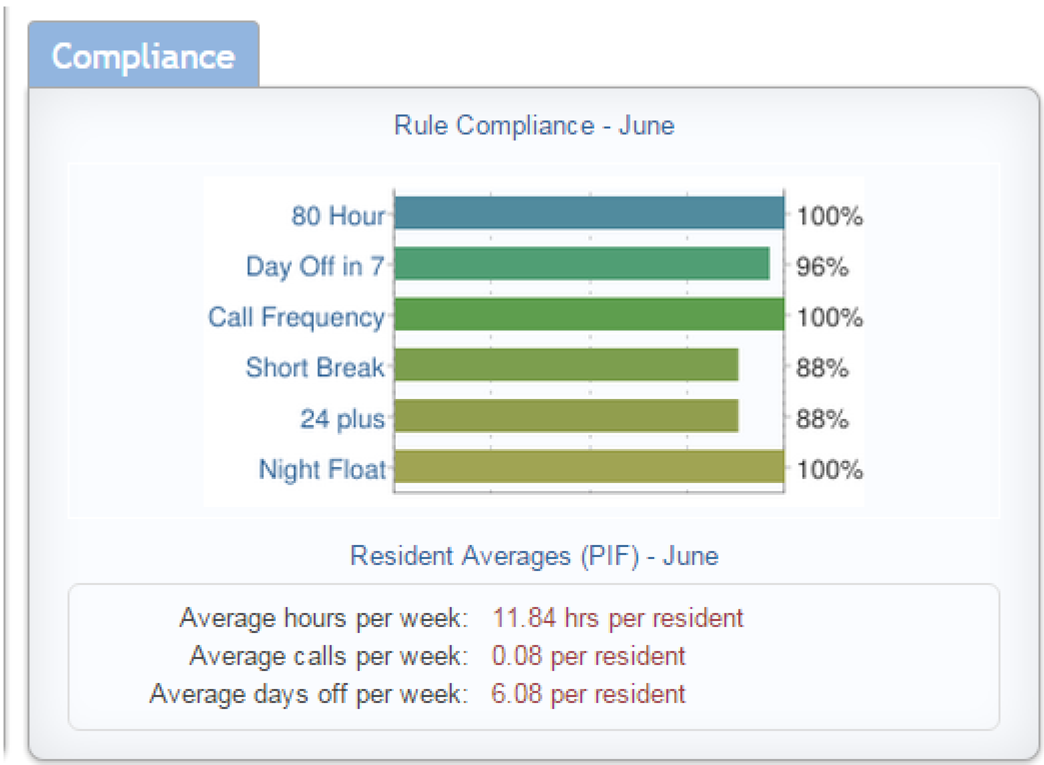
7/26/2015 to 8/1/2015 ◉ Current week ○ Last week ○ 2 weeks ago ○ 3 weeks ago ○ 4 w

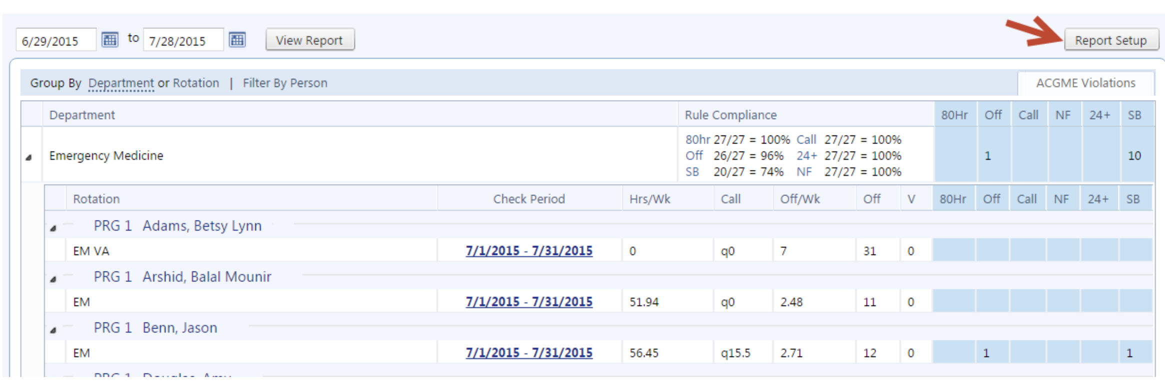
Person	Rotation	Sun	Mon	Tue	Wed
Adams, Betsy Lynn	EM:EM:VA				
Agarwal, Needha	EM:EM	12	12		12
Arshid, Balal Mounir	EM:EM		10		12
Benn, Jason	EM:EM		12	12	
Browning, Daniela	EM:EM:VA	7	12		12
Caputo, Eric Matthew	EM:EM:VA		12		12

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).





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

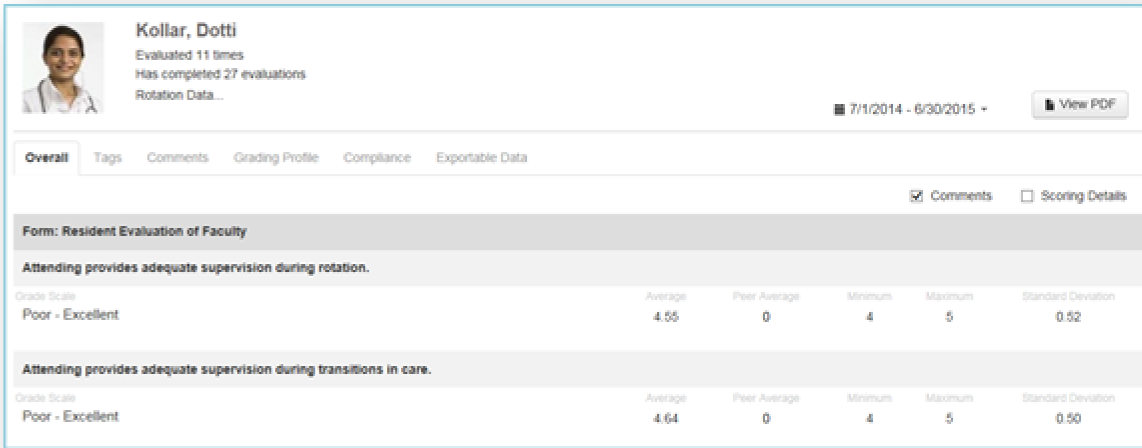
Evaluations>Reports

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



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

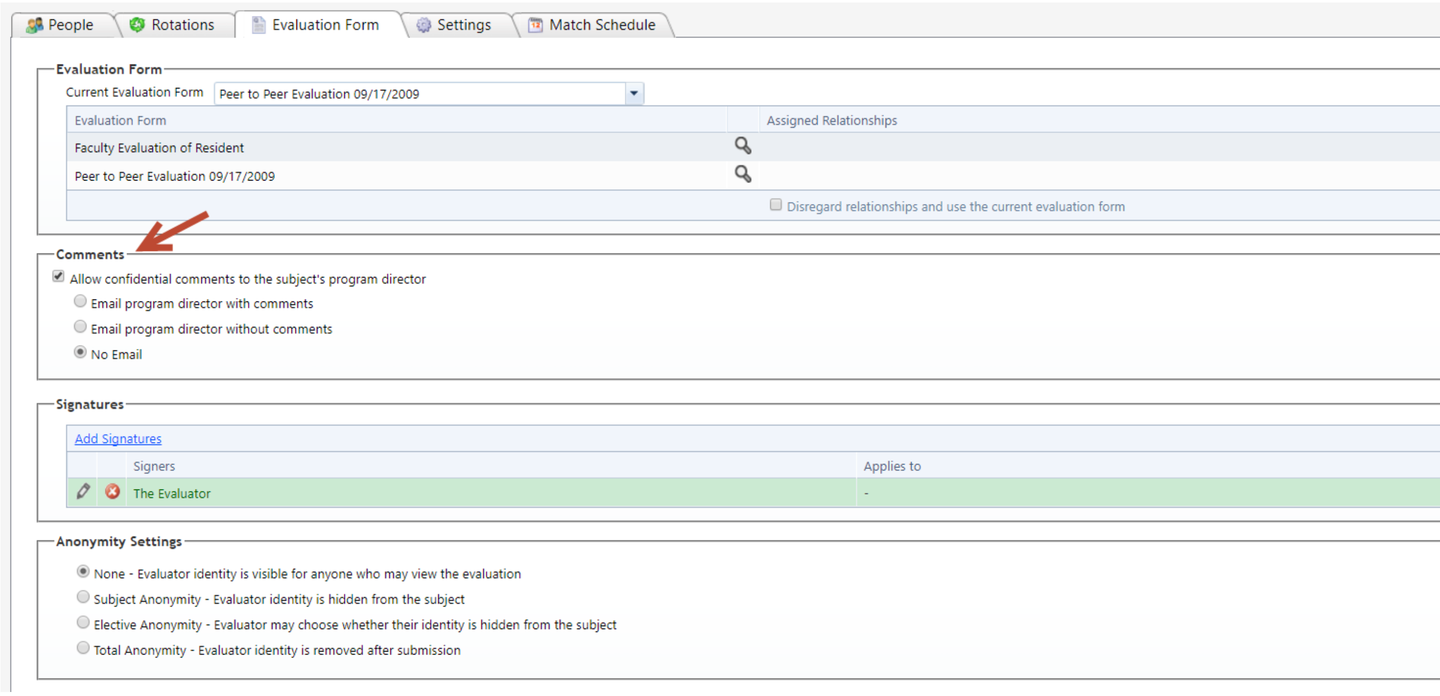
Confidential Comments is a feature that allows evaluation participants to leave a note on an evaluation form that can only be accessed by the subject's Program Director. No one other than the PD has access to view the comments, including L5 and L6 users.

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

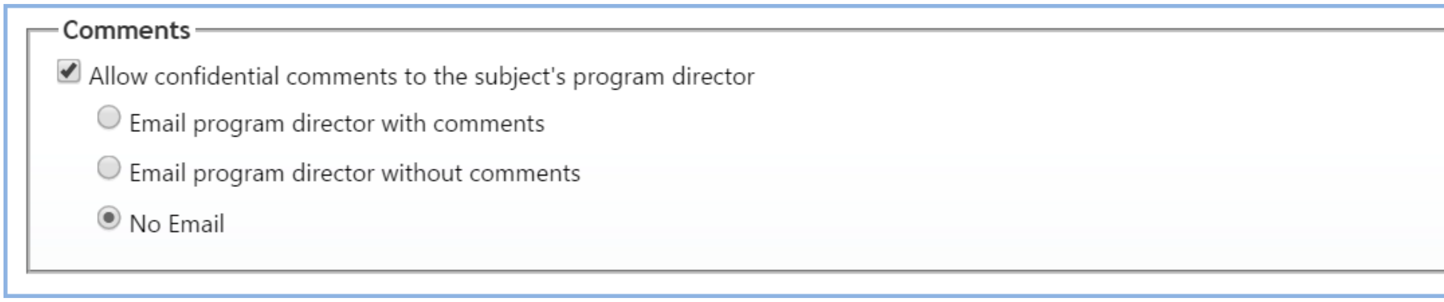
- The PD's name is listed in the program's personnel section in *Administration.*
- The subject of the evaluation is a resident or fellow with a current training record

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.

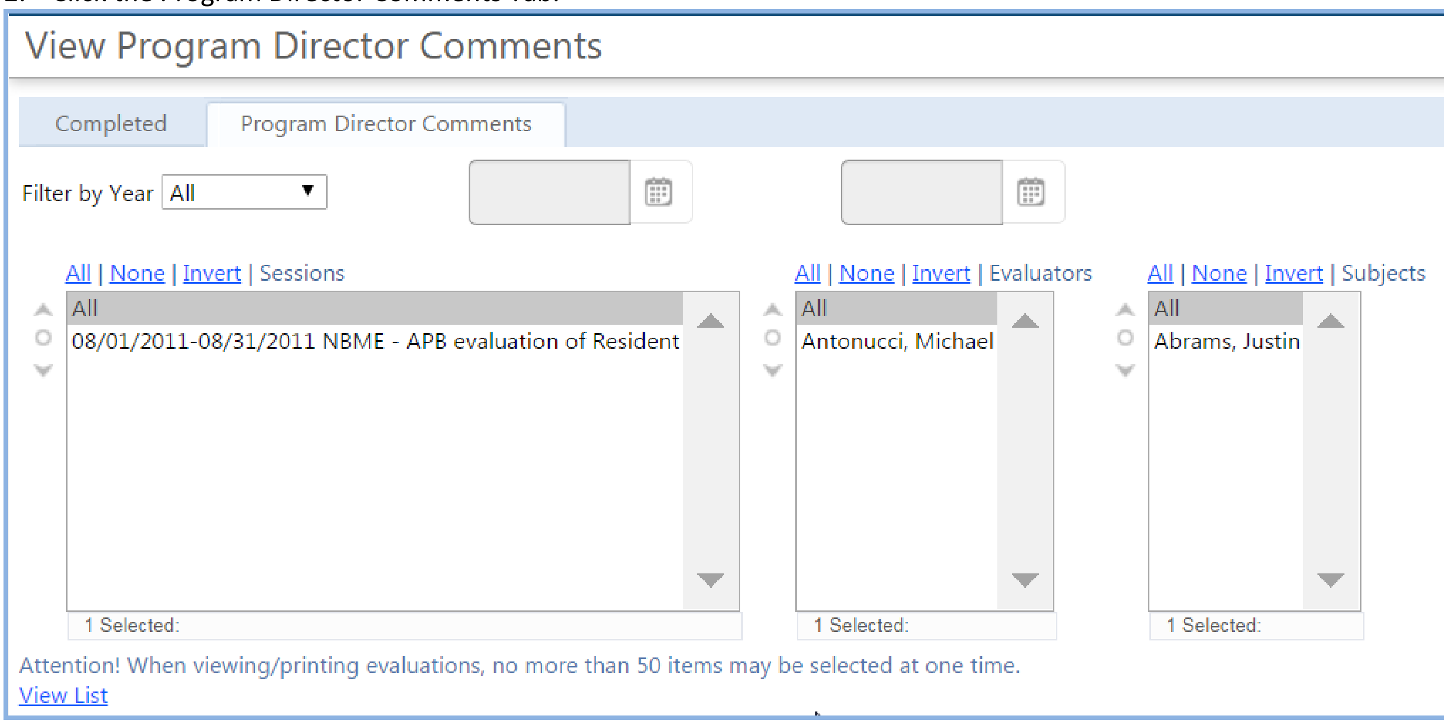


- When checked, you have the option to notify the PD when a confidential comment is submitted.
    - Check the box to allow confidential comments.
    - Choose to send a notification to the PD with or without the comments included in the notification.



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.

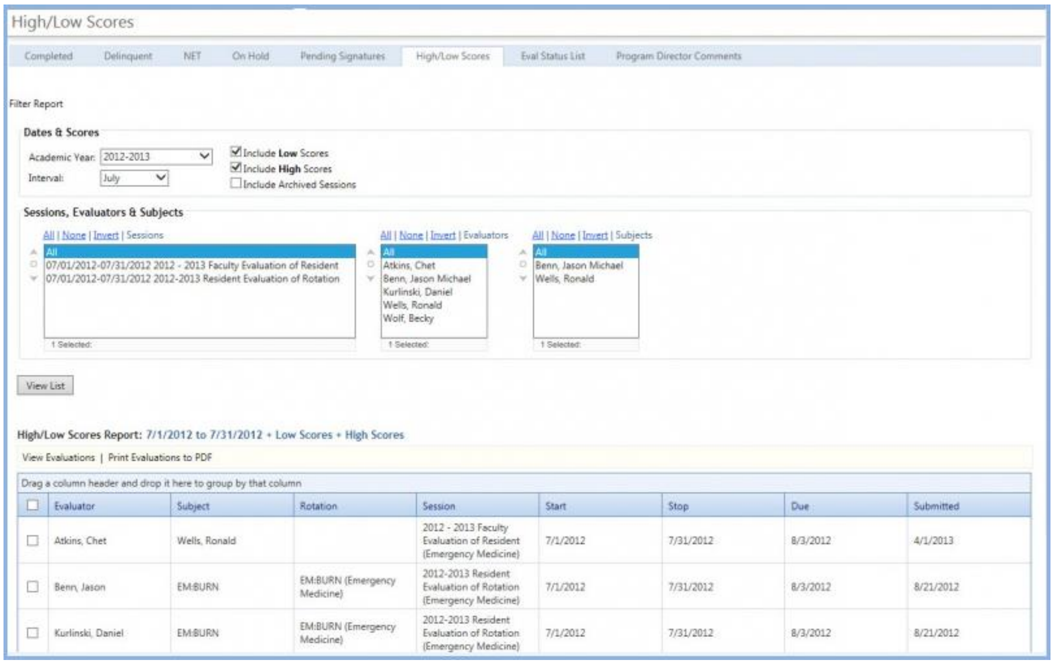
1. Go to *Evaluations > View Evaluations*
2. Click the Program Director Comments Tab.



View 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**

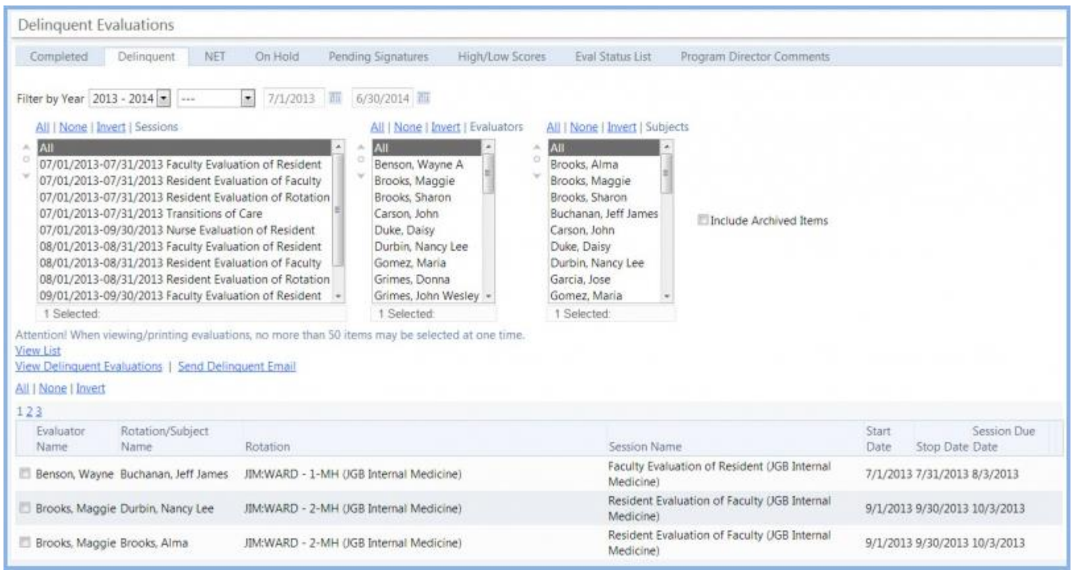


View Delinquent Evaluations

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**



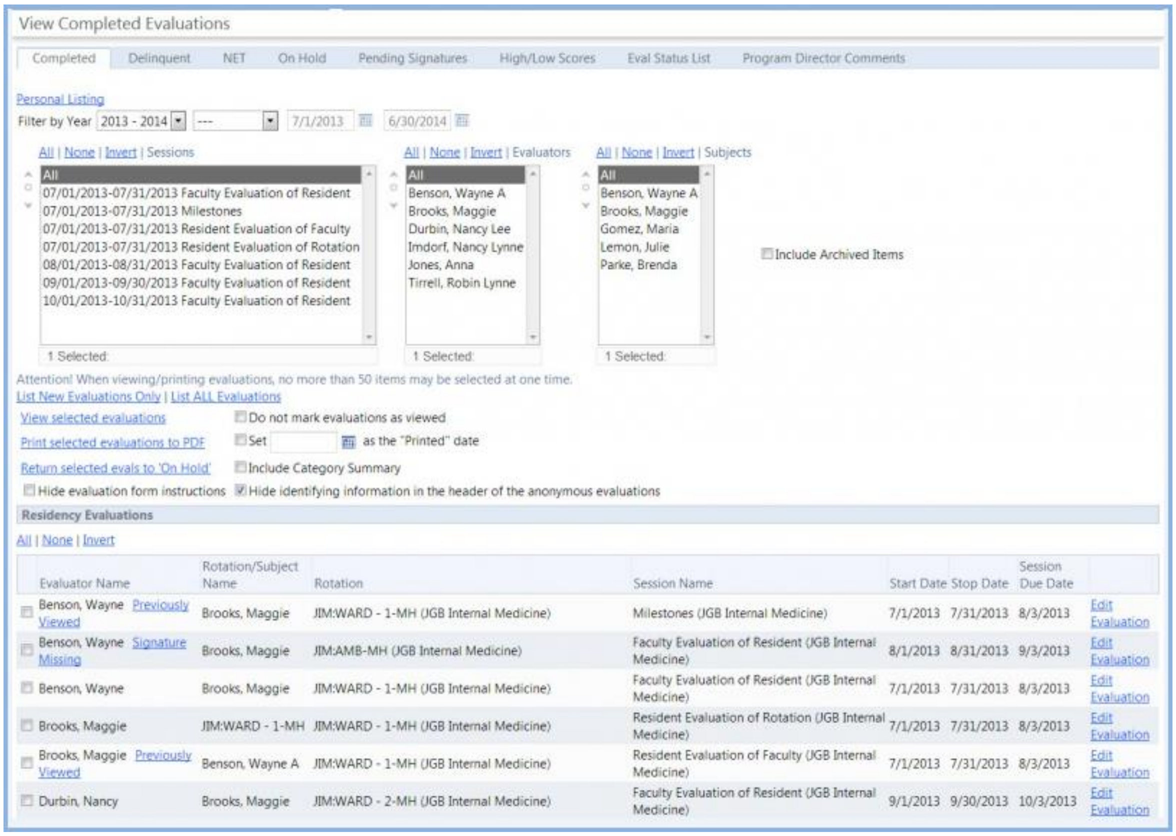
Notes:

- 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**



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

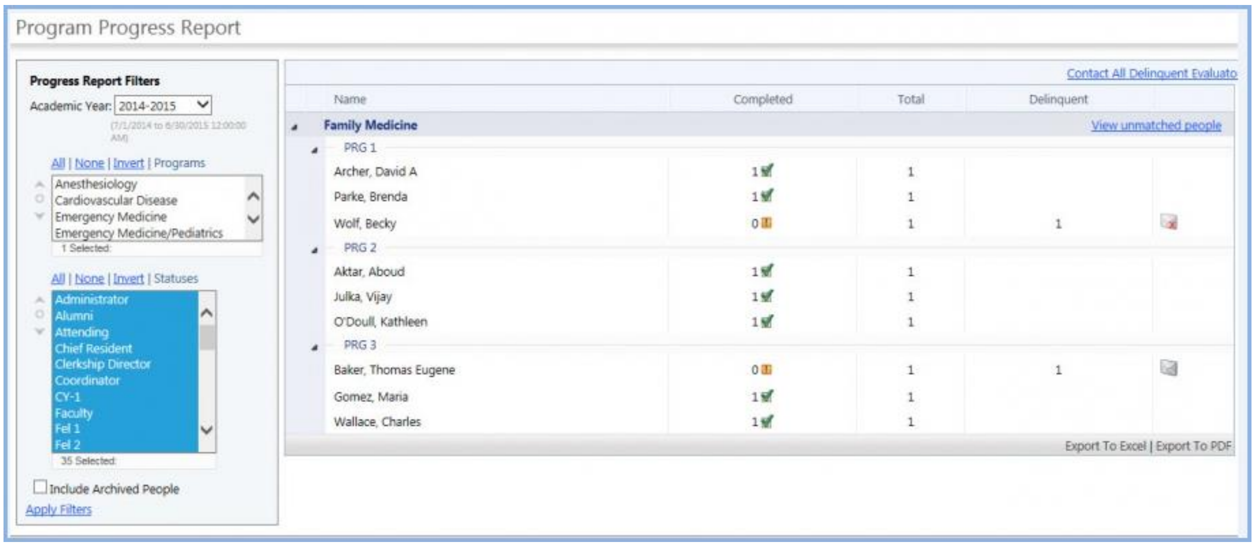
- Use the Problem Resolution Report to track progress and document the resolution process

Program Evaluations - Progress Report

This report is 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**

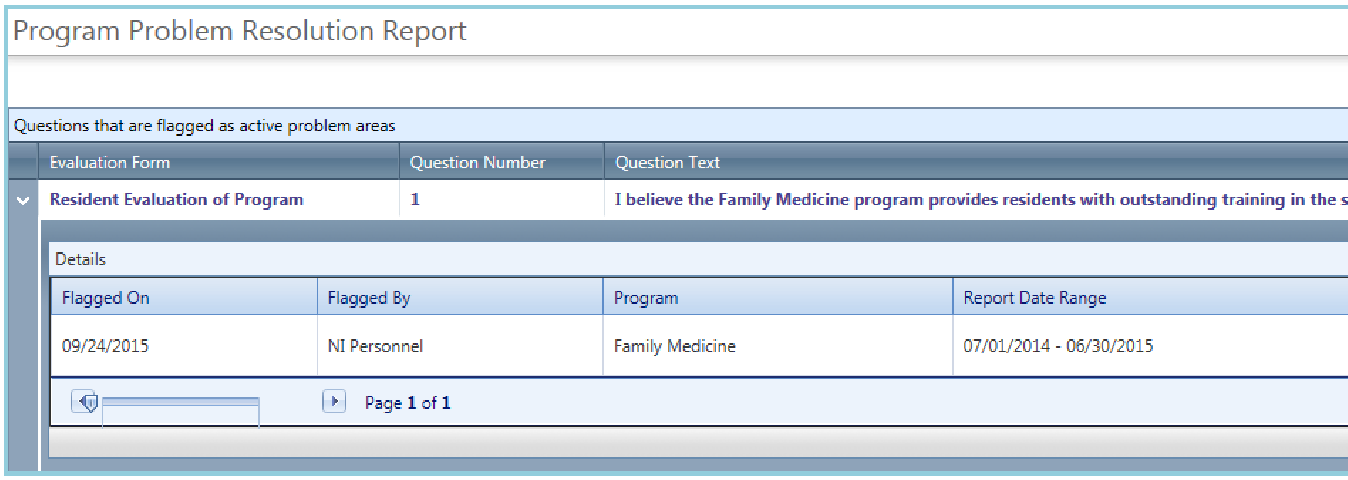


Program Evaluations - Problem Resolution Report

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



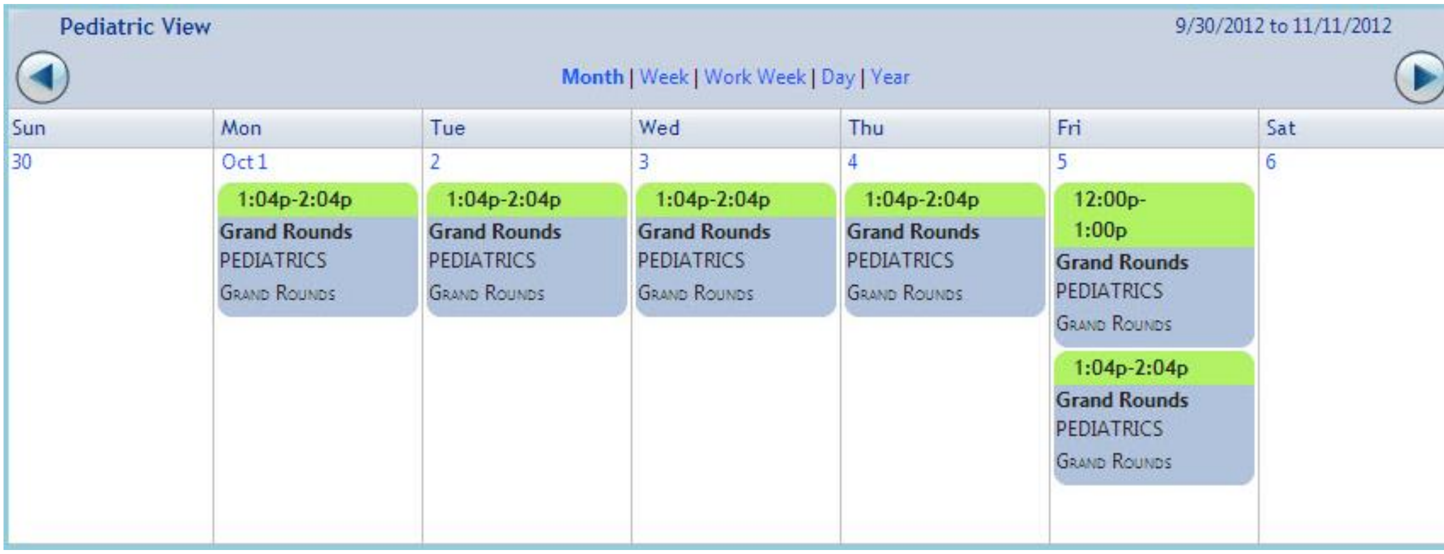
Conferences Module

- 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



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

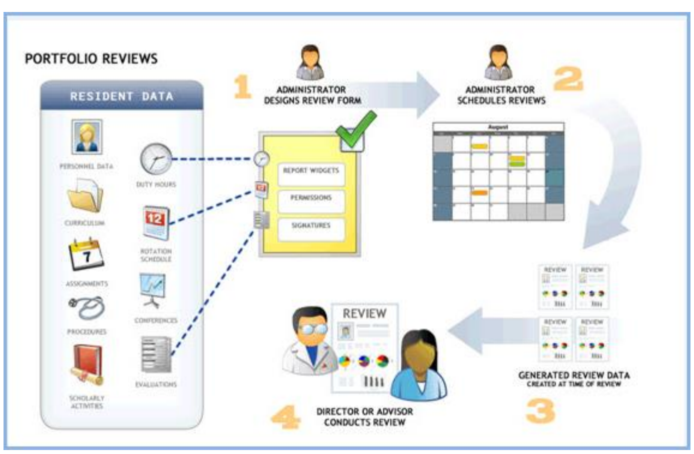
Portfolio Reviews

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.

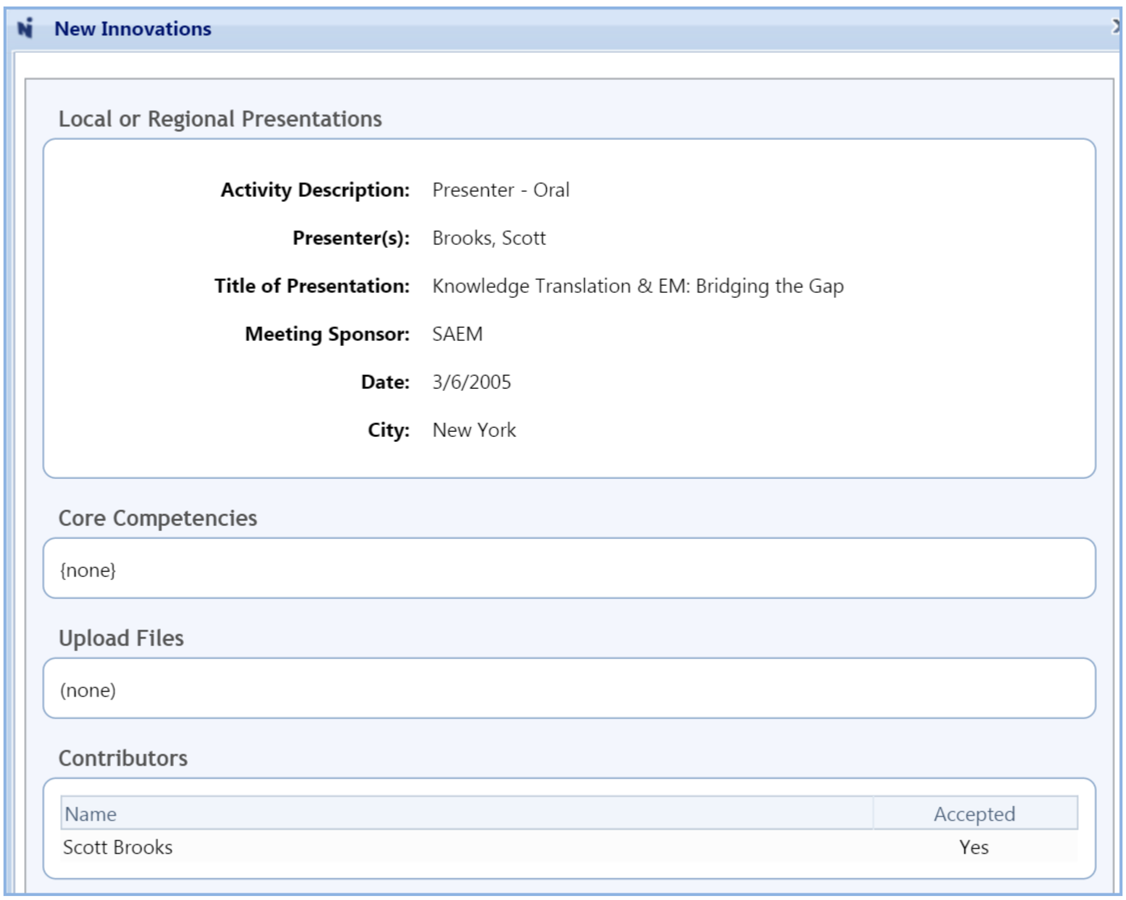
The Review Process



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.

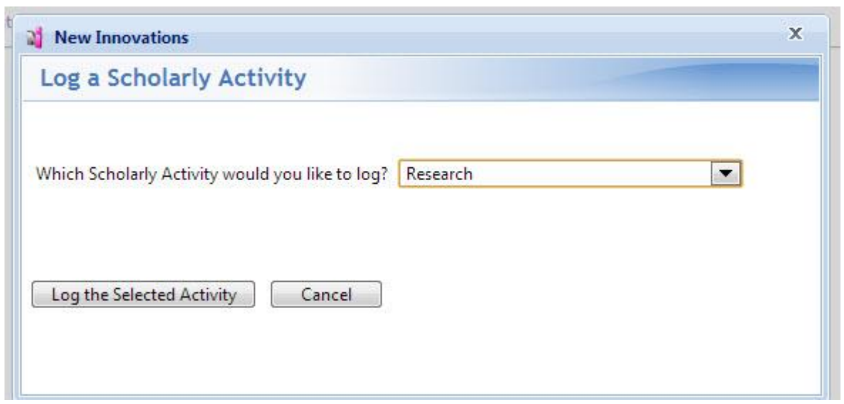


Log Scholarly Activities

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**

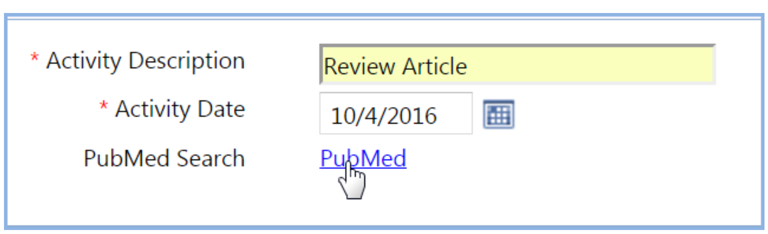
1. Select the type of Scholarly Activity you wish to log
2. Click **Log the Selected Activity**
3. Complete the entries
4. Click **Save**



PubMed

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

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



Adding Contributors

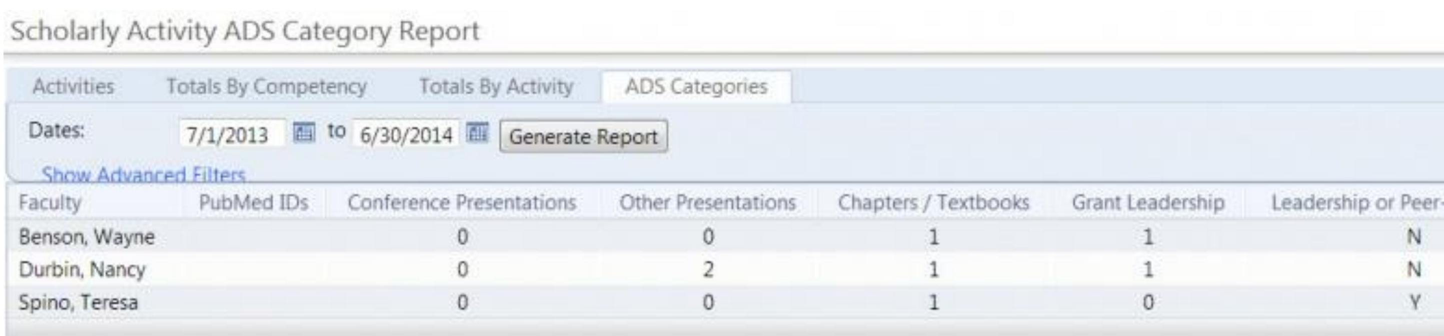
The contributor feature gives users the ability to log a scholarly activity and invite others in as collaborators. Once a user becomes a contributor, he or she can fully access that scholarly activity log. Contributors and authors of a particular scholarly activity can then access and share information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

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

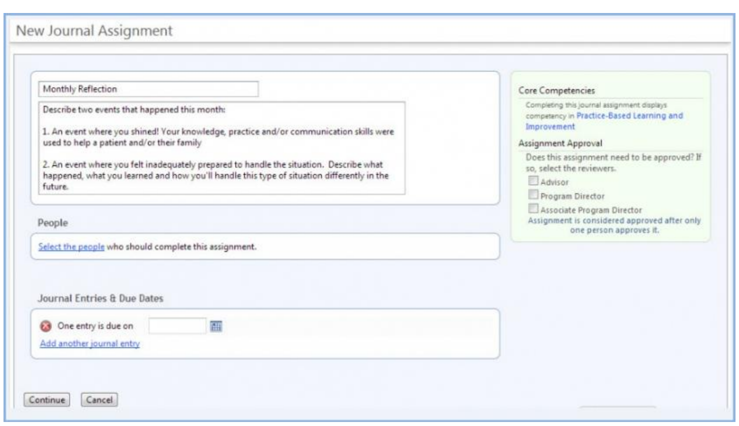
- Create journal assignments and assign to residents
- Specify key educators to approve or sign off on a journal assignment
- Facilitate dialogue through commenting by authors, reviewers, advisors or administrators
- Send notifications when new comments are added to a journal entry someone is associated 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**



Logger Module

Procedure Logger

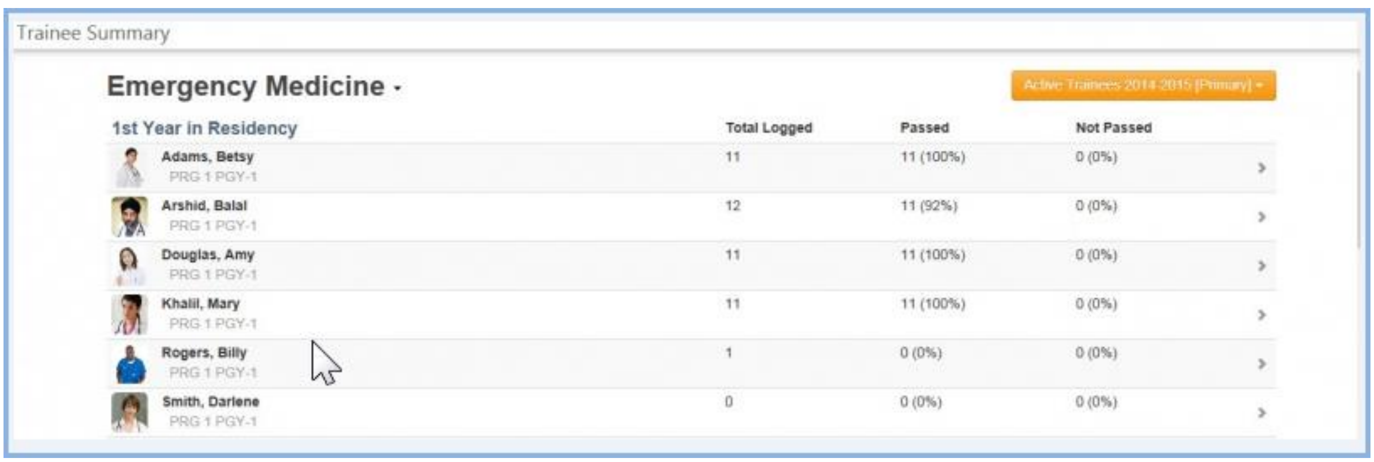
- Track data about procedures residents perform
- Design your own procedure log form
- Create procedure and diagnosis lists by program
- Use the confirmation process to automatically credential residents in required procedures
- Offer lists of credentialed residents to nurses
- Import procedures from 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.



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%)

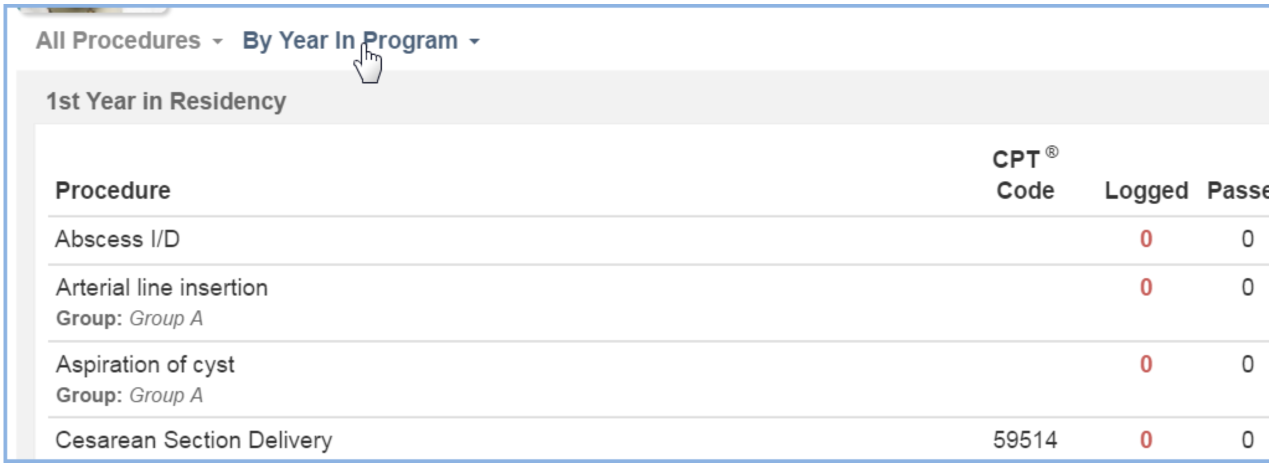
3. Click **Current Trainees** to select a different academic year and display the list of trainees that were active during the year selected. Using this feature lets you look at trainees from past years, even if their record is archived. The residents must have a training record to be able to separate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

4. 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.

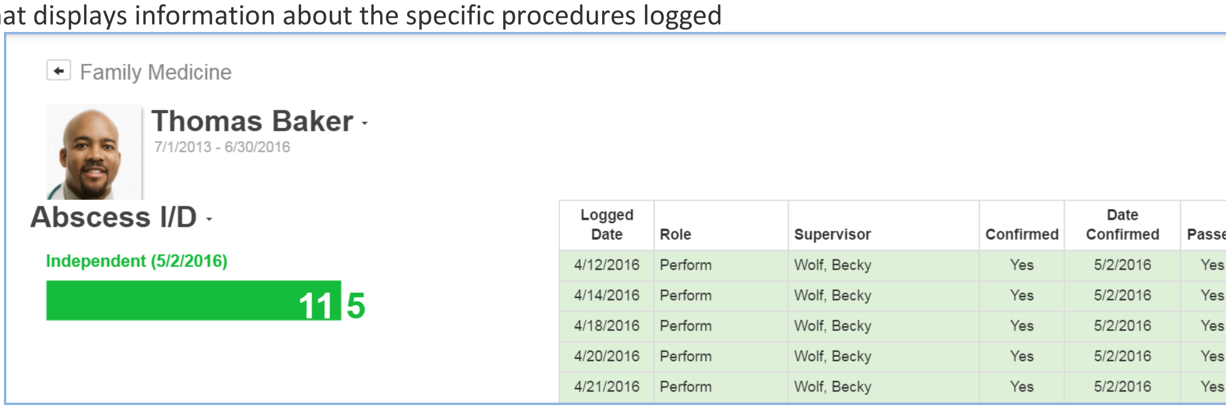
5. Procedures can be displayed by Group. Click **By procedure** and select **By groups** to display all logs for each group. Click **By Group** to select a single group name and only the procedures belonging to that Group will be displayed. Click **By procedure** again to return to the full list of procedures by that resident.

Procedure	CPT® 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 5/2/2016
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.



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



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.

Log Books

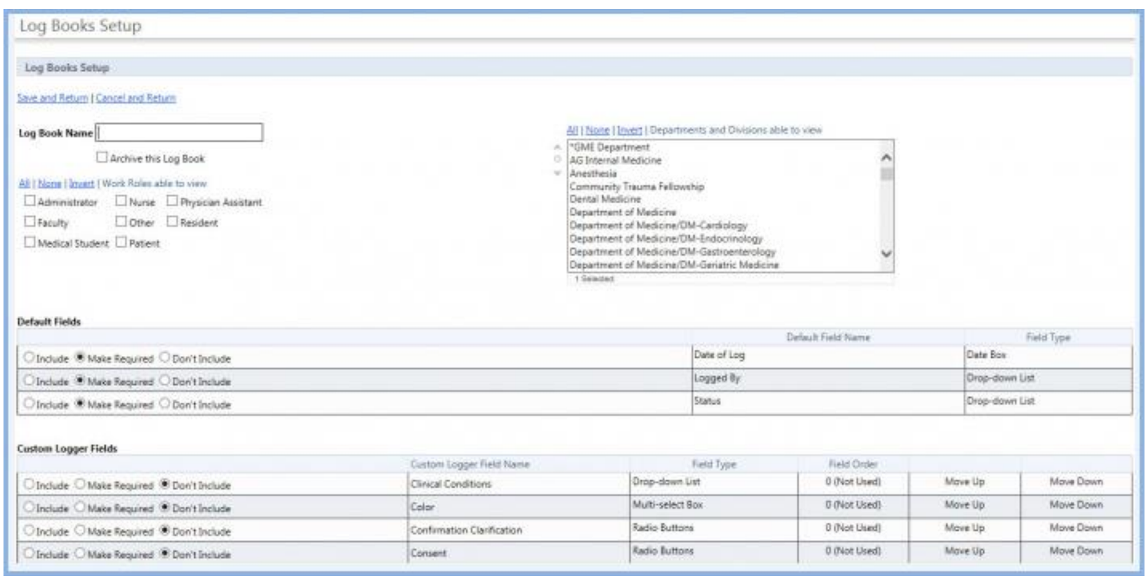
- Create custom logger fields to gather data unique to your institution or program
- Designate who can enter and view the information stored in Log Books
- Generate Log Book Reports

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



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.