

Portfolio - Scholarly Activity - Setup



Presentation Name:	Fibromyalgia
Activity Date:	7/3/2013
Presentation Location (City, State):	Columbus, OH
Summary of Presentation:	fibro symptoms, testing & help

Core Competencies

- Patient Care
- Medical Knowledge
- Systems-Based Practice
- Practice-Based Learning and Improvement

Administrators set up online forms to collect detailed information for each type of activity. New Innovations provides some basic templates which can be customized to meet program preferences for any type of scholarly activity. New forms can also be created to fit your needs.

Administrators can create and design forms that are made available to faculty and residents for the purpose of capturing all the relevant information about their scholarly activities, for example peer-reviewed journal articles and national presentations. Activities logged using these forms can then be tracked by the type of activity, ADS category or by relevant activity dates. When setting up scholarly activity forms, you can create a new form, copy an existing form or use one of our templates. Once the forms are created in each department they can be used by department members and copied to other departments the administrator is privileged in.

Only people whose personnel profile is in the department where the Scholarly Activity form was created can log activities on that form. Faculty and Residents or Fellows from outside departments will not have access to the form.

Create a Form

1. Go to *Portfolio > Forms*
2. Click **New**
3. Select **Create A New Form From Scratch** and then **Create Form**
4. You may also use one of the templated forms. Just select the form and edit any fields or names as needed.

Tabs

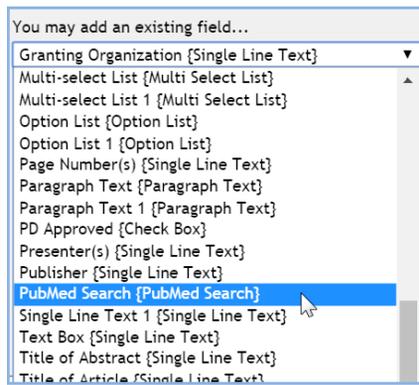
Add a field tab

1. Click the section [untitled] to enter the name of the form. You may also use the Form Properties tab to enter the name.
2. An Activity Description field and Activity Date field are provided, by default. These are the fields that will display when Activities are viewed and reports are generated.
3. Add a field:

Existing fields. These are suggested fields for your form provided by New Innovations:

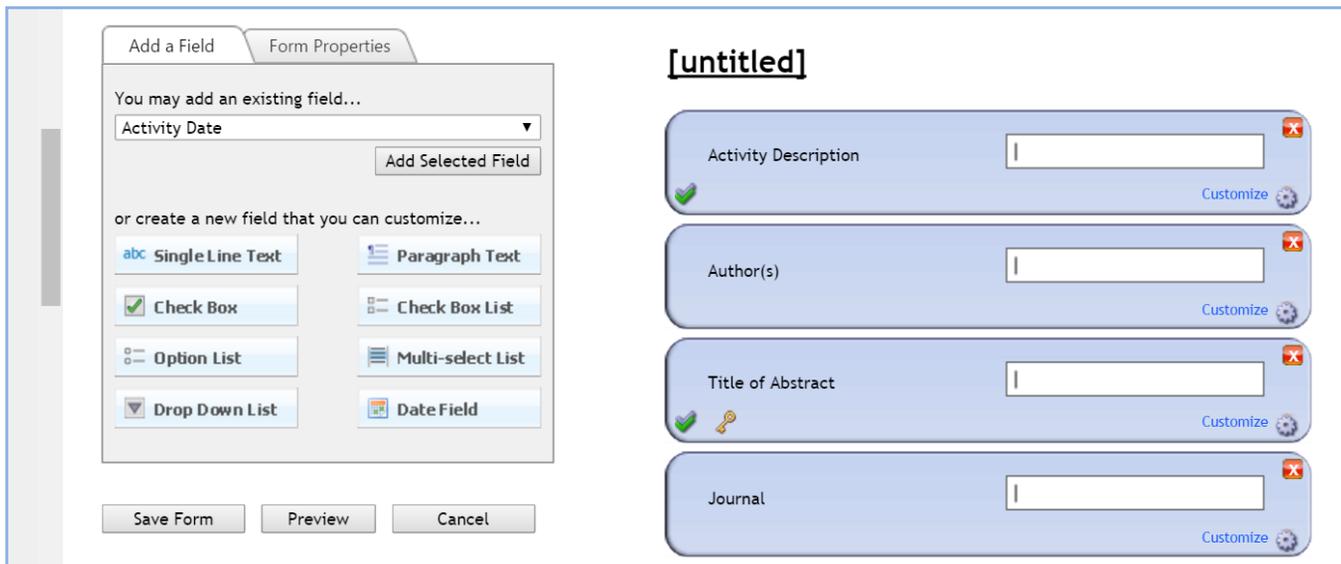
1. Select an existing field from the drop-down list.
2. Make your selection
3. Click Add Field

One of the existing fields is **PubMed Search**. People using this field can search PubMed for articles and attach them to the form.



Create a new field that you can customize. Customize after selecting a field to create the name and options.

1. Select the field type;
2. Click on the customize link
3. Enter a new label
4. If this field is required checking the box
5. Indicate that this field should be used as an Activity or Date description field



Form Properties Tab

1. Enter form name and click **Update Name**
2. Activity Description and Activity Date field can be changed or added here
3. Select the ADS Category
4. Select Core Competencies that apply to the activity
5. Check the box below the competency list to give users ability to choose any of the selected competencies. If not checked, the form automatically records all competencies selected.

6. Click **Save Form**

Create a Scholarly Activity Form

Form Customize/Preview

[untitled]

Add a Field | Form Properties

Form Name
[untitled] [Update](#)
[Name](#)

Activity Description Field 
Activity Description

Activity Date Field 
Activity Date

ADS Category
[No Category](#)

To which Core Competencies will this form apply?
[All](#) | [None](#) | [Invert](#)

- ▲ Patient Care
- Medical Knowledge
- ▼ Practice-Based Learning and Interpersonal and Communication Professionalism
- Systems-Based Practice

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

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

[Preview Form](#)

Activity Description   [Customize](#)

PubMed Search  PubMed   [Customize](#)

Activity Date    [Customize](#)

Email Notifications

Administrators can configure email notifications for Scholarly Activity Forms.

1. Go to *Portfolio > Notifications*
2. Click the **Scholarly Activity** tab
3. Check the boxes for the following email notifications:
 1. Email people when they are added as contributors to Scholarly Activities
 2. Include an auto-login link in the email
4. If you have privileges in multiple Departments, check the box to apply these settings to other Departments
5. Click **Save**

Notification Setup

Reviews

Scholarly Activity

Journals

- Email people when they are added as Contributors to Scholarly Activities.

Email Message:

You have been included as a contributor on [*Activity Owner's Name*]'s [*Activity Description*] Scholarly Activity.

- Include auto-login link in all Portfolio emails?
- I want to apply the above settings to other departments.

Save