

Within your Portfolio Reviews, you can select what types of data is gathered into the form through the use of widgets. Each of the widgets is described below.

Widget	Description	Filters & Display Information	Configuration	Source
Continuity Clinic Counts	A list of the total number of clinics worked and the total number of weeks when clinics were worked from the beginning of the residency period to the end date of the review period	<ul style="list-style-type: none"> Includes all continuity clinics scheduled prior to the review period end date (Assignments in Assignment Schedule must have the Continuity Clinic "CC" designation") Each row represents a training year Total clinics column contains a count of scheduled continuity clinics in the training year Clinic weeks column contains the number of calendar weeks within each training year that included at least one continuity clinic assignment 	<p>The name of the widget can be changed</p> <p>The time frame can be adjusted to display continuity clinic totals for the Review Period or the Residency Period</p>	Assignment Schedules
Compliance Per Rotation	A list of rotations indicating that the subject confirmed the assigned curriculum and completed the corresponding evaluations of the faculty and rotations	<ul style="list-style-type: none"> Includes rotations that end within the review period Includes results from On Demand Includes both primary and non-primary rotations The program identified in the scheduled rotations must be the same as the review program in order for the rotation to appear on this widget 	The name of the widget can be changed	Curriculum Block Schedules Evaluations
Rotation Requirements	A report showing the subject's progress toward meeting rotation requirements as configured in Schedules > Block Scheduling > Setup, Rotation Requirements	<ul style="list-style-type: none"> This widget is only available if you use the Rotation Requirements feature Information will be displayed for the entire residency, not just for the review period Residents and fellows must be on primary rotations for their time to count toward the rotation requirements The program identified in the scheduled rotations must be the same as the review program in order for the 	The name of the widget can be changed	Block Schedules

		rotation to appear on this widget		
Conference Attendance	A report of conferences showing the attendance percentage and the number of times the subject was tardy, excused and present. The Department/Division must have a 'Conference Attendance Requirement' set up for the conferences to appear on the widget.	<ul style="list-style-type: none"> Includes conferences that list the resident on the roster Includes conferences that end within the review period start and end dates Includes required and non-required conferences. A "% Attended" value is only calculated for required conferences. Requirements are shown only if the department uses Option 1 for Attendance Requirements. 	<p>The name of the widget can be changed</p> <p>The time frame can be adjusted to display conference attendance statistics for the Residency Period</p>	Conferences
Curriculum Confirmed	A list of rotations indicating whether the subject confirmed the corresponding curriculum	<ul style="list-style-type: none"> Lists curriculum attached to Primary rotations that end within the review period The program identified in the subject's scheduled rotations must be the same as the review program in order for them to appear on this widget 	The name of the widget can be changed	Curriculum Block Schedules
Work Hour Violations	A list indicating Work Hours statistics and violations for each rotation	<ul style="list-style-type: none"> Statistics will be displayed for primary rotations only Rotations must start before the end date of the review period There must be at least four weeks in the review period Logs must have been checked against the rule configurations Hrs/Wk shows the average number of hours worked per week, determined by the following equation: $[\text{total hours} \div (\text{number of days on the rotation} - \text{the number of vacation/leave days})] \times 7$ and recorded logs must include a Work Type configured in the 80 Hour Rule in the department that owns the rotation the resident was scheduled on when the hours were logged Calls or violations that span rotations count will be 	<p>The name of the widget can be changed</p> <p>You may choose to display violations from of ACGME, AOA or NYS rules</p>	Work Hours Block Schedules

		<p>displayed with the rotation where the log begins</p> <ul style="list-style-type: none"> • Violation counts represent violations of the home department's rules unless the rotation is from an outside department that has its own rules configured • The program listed in the subject's scheduled rotations must be the same as the program where the review takes place 		
<p>Competency by Rotation</p>	<p>A report showing the subject's competency-based evaluation scores by primary rotation</p>	<ul style="list-style-type: none"> • Primary rotations will be listed as they appear on the completed evaluation • Unspecified rotations will not be displayed • The primary rotation end date on the block schedule must fall within the configured time period • The match end date must falls within the scheduled rotation period • Evaluation results are included for responses to evaluation questions that have a core competency tag • Includes data from evaluations regardless of anonymity settings • Includes data from archived evaluation forms • Excludes data from evaluations that are on hold • The following data will be displayed for each rotation: <ul style="list-style-type: none"> ◦ Rotation name ◦ Rotation start and end dates • The following data will be displayed for each competency by rotation: <ul style="list-style-type: none"> ◦ Core competency name ◦ Aggregated evaluation results for each competency ◦ Grade scale • Only responses from Rating scales will be displayed 	<p>The name of the widget can be changed</p> <p>The time frame can be adjusted to display data for the Review Period or the Residency Period</p> <p>Results from outside departments can be excluded</p>	<p>Evaluations</p>

		<ul style="list-style-type: none"> • Different Rating scales with the same number of options that have the same values will be combined on the same chart • Results from different Rating scales with a different number of options will appear on separate charts <p>Note: Results from these types of questions will NOT appear on this widget:</p> <ul style="list-style-type: none"> • Subcompetencies • Custom subcompetencies • Milestones (Milestone Narratives) 		
<p>Competency by Resident Year</p>	<p>A Report showing the subject's competency-based evaluation scores aggregated by residency year</p>	<ul style="list-style-type: none"> • Results are included if the match end date falls within the configured time period for the widget • Results are included for responses to evaluation questions that have been tagged with a core competency • Includes data from anonymous evaluations • Includes data from archived evaluation forms • Excludes data from evaluations that are on hold <p>The following data will be displayed for each year in program, competency and grade scale:</p> <ul style="list-style-type: none"> • Status • Residency Year Start Date - earliest evaluation match start date for this status type <ul style="list-style-type: none"> ◦ Must fall between the program start and end dates ◦ Evaluation dates and status come from the match • Residency Year End Date - latest evaluation period start date for this status type <ul style="list-style-type: none"> ◦ Must fall between the program start and end dates 	<p>The name of the widget can be changed</p> <p>The time frame can be adjusted to display data for the Review Period or the Residency Period</p> <p>Results from outside departments can be excluded, if allowed by the session</p>	<p>Evaluations</p>

		<ul style="list-style-type: none"> ○ Evaluation dates and status come from the match ● Competency ● Aggregated evaluation results for competency ● Grade Scale <ul style="list-style-type: none"> ○ Only Rating scales appear ○ Different Rating scales with the same number of options having the same values are displayed on the same chart ○ Separate charts are displayed for each Rating scale with different numbers of options (e.g. 1-5, 1-9) 		
Evaluation Comments - All	A report showing comments from any evaluation within the selected date range sorted by tag and question	<ul style="list-style-type: none"> ● Comments from evaluations with match end dates that fall within the review period ● Comments will display by Competency, Custom tag, then by question; then comments that are not tagged and Overall Comments ● Overall comments will display ● Includes data from anonymous evaluations ● Includes any comments from an evaluation ● Includes data from archived evaluation forms ● Excludes data from evaluations that are on hold 	<p>The name of the widget can be changed</p> <p>The Time Period can be set to display data for the Review Period or Residency</p> <p>Can include comments from evaluations completed during the time frame</p> <p>Results from outside departments can be excluded</p>	Evaluations
Evaluation Comments – By Competency	A report showing the subject's competency-based comments and general evaluation comments by rotation	<ul style="list-style-type: none"> ● Rotations will be listed as they appear in the completed evaluation (Unspecified rotations or N/A will not display on this widget) ● The rotation end date from the block schedule must fall 	<p>The name of the widget can be changed</p> <p>The Time Period can be adjusted to display data for the Review Period or</p>	Evaluations

		<p>within the configured time period</p> <ul style="list-style-type: none"> • The match end date must fall within the scheduled rotation dates • Only comments from questions that have been tagged with a core competency will display • Only comments from faculty evaluations of residents will display • Overall comments will be displayed • Includes data from anonymous evaluations • Includes data from archived evaluation forms • Excludes data from evaluations that are on hold 	<p>Residency</p> <p>Can include comments from evaluations completed during the time frame</p> <p>Results from outside departments can be excluded</p>	
Log Book Counts	A report showing a count of entries created for each Log Book	<ul style="list-style-type: none"> • Shows logs entered for the review period and for the entire residency 	<p>The name of the widget can be changed</p> <p>The list of Log Books can be filtered</p>	Log Books
Certifications	A configurable list of certifications from the subject's Personnel Data record	<ul style="list-style-type: none"> • The following fields will be displayed: <ul style="list-style-type: none"> ◦ Certification type ◦ Description ◦ Start Date ◦ End Date • If the certification information is not entered for a certification type, the type will be listed with a blank row • If the certification is expired, it will appear in red 	<p>The name of the widget can be changed</p> <p>Certification types can be filtered</p>	Personnel
Custom Personnel Data	A list of information from any custom data field available in Personnel	<ul style="list-style-type: none"> • Shows the Custom Data field name • Shows the Value entered into the custom data field for the resident <p>Note: If the custom data is not entered for a field for the subject,</p>	<p>The name of the widget can be changed</p> <p>Custom Data fields can be filtered</p>	Personnel

		the value column will be blank for that custom data field		
Training Record	A list of the Residency Training Record from the subject's personnel record	<ul style="list-style-type: none"> The following fields will be displayed: <ul style="list-style-type: none"> Start Date End Date Program Year Status Post Graduate Year 	The name of the widget can be changed	Personnel
State Licenses	A list of all state Licenses from the subject's personnel record	<ul style="list-style-type: none"> The following fields will be displayed: <ul style="list-style-type: none"> Description State Specialty Number Start Date End Date If the license is expired, it will appear in red 	The name of the widget can be changed	Personnel
Test Scores	A configurable list of Test Scores from the subject's Personnel record	<ul style="list-style-type: none"> The following fields will be displayed: <ul style="list-style-type: none"> Test type Date taken Score Pass/Fail Percentile If a test result hasn't been entered, the test type will display with a blank row 	<p>The name of the widget can be changed</p> <p>Test Score types can be filtered</p>	Personnel
Journal Assignment Compliance	A list of journal assignments including totals of assignments assigned and completed	<ul style="list-style-type: none"> Only the number Assigned during the review period will display Assignments Submitted during the review period will display If the number Submitted is red, the person has assignments that are overdue 	The name of the widget can be changed	Portfolio
Milestone Progress	Shows the progress of the resident's subcompetency scores from each Milestone Review during the residency period	<ul style="list-style-type: none"> Displays scores from Milestone Reviews given to the resident by the Clinical Competency Committee (Portfolio > Milestones) Includes scores from Milestone Reviews that are both in 'Draft' mode and from those marked as 'Complete' The Portfolio Review Period must include the month of 	The name of the widget can be changed	Portfolio

		<p>the milestone reporting period to display results</p> <ul style="list-style-type: none"> • All prior results will be included • Off-Cycle Residents: The Portfolio Review period end date must be within 30 days of the person's Training Record end date for the milestone results to appear on the Review 		
Scholarly Activity	A configurable list of scholarly activities including totals for each type of activity the subject logged	<ul style="list-style-type: none"> • Shows the number of Activities logged for each form • Only displays Activities where the subject is the owner, not a contributor • Activities must be logged in the department that owns the subject's program 	<p>The name of the widget can be changed</p> <p>The time frame can be adjusted to display Scholarly Activities for the Review Period or the Residency Period</p> <p>Scholarly activity forms can be filtered</p>	Portfolio
Scholarly Activity by Competency	A configurable list of competencies with totals for scholarly activities completed for each competency	<ul style="list-style-type: none"> • Shows the number of Activities logged for each core competency • Only displays Activities where the subject is the owner, not a contributor • Activities must be logged in the department that owns the subject's program 	<p>The name of the widget can be changed</p> <p>The time frame can be adjusted to display Scholarly Activities for the Review Period or the Residency Period</p> <p>Activities can be filtered by core competency</p>	Portfolio
Procedures Logged	A list of Procedures showing the number passed, not passed and the credentialing status of the subject	<ul style="list-style-type: none"> • Confirmed procedures that have been logged in the department that owns the subjects' program will display with the following information: <ul style="list-style-type: none"> ◦ Procedure name ◦ Number of procedures passed during the residency (including offsets) 	<p>The name of the widget can be changed</p> <p>Procedures with targets can be filtered</p> <p>Procedures can be filtered by name; and procedure names without a</p>	Procedure Logger

		<ul style="list-style-type: none">○ Number of procedures not passed during the residency○ Resident credentials○ By default, only procedures with targets will be displayed. Customize the widget to include all procedures.● Archived procedures are not included● By default, all procedures that include a target number in the Oversight level of supervision will appear	target Oversight level can be selected in the filter	
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