NEW INNOVATIONS

Training Guide Level 5 Administrators

UTHealth®
The University of Texas
Health Science Center at Houston

McGovern
Medical School

Table of Contents

GETTING STARTED

LOGGING IN

System Requirements
- Use Google Chrome or Internet Explorer 7.0 or later for optimum performance and security. We recommend Mozilla Firefox for MAC users.
- High speed internet connection
- Microsoft .net Framework 3.5 for using MedScheduler (Windows computers only)

Client Login
1. Go to https://www.new-innov.com/UTH
2. **Click on Log In with UTHealth Credentials**
3. Enter your UTHealth Username
4. Enter your UTHealth Password
5. Click **Log In**
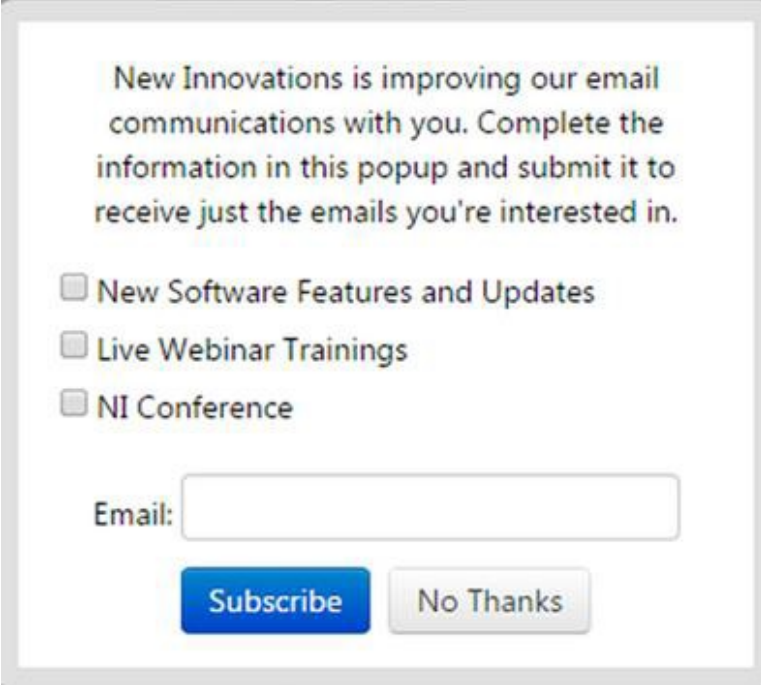
EMAIL SUBSCRIPTION

As an administrator, you are eligible to subscribe to informative emails from New Innovations about the following topics:

- New Software Features and Updates – Learn about new releases and enhancements made in the software
- Live Webinar Trainings – Receive notifications about free training webinars
- NI Conferences – Get information about our training conferences held in the Spring and Fall of each year

When you first login, you will see the popup shown below. We encourage you to select the types of email(s) you would like to receive, check your email address for accuracy, and click **Subscribe.** These emails will help you to keep abreast of the latest developments in the software and to take advantage of the trainings available from New Innovations.

Once you click **Subscribe**, a confirmation email will be sent to you from New Innovations. Please click on the link in the email to confirm your email address.

New Innovations is improving our email communications with you. Complete the information in this popup and submit it to receive just the emails you're interested in.

☐ New Software Features and Updates
☐ Live Webinar Trainings
☐ NI Conference

Email: [   ]

Subscribe   No Thanks

If you click **No Thanks** and then change your mind, please submit a Support Request at *Help > Contact Us* and we will reset the popup screen for you.

THE HOME PAGE

The Home Page contains links to access tasks and applications. Panels on the Home Page can be rearranged, expanded, and some can be collapsed to suit the user's preferences. My Favorites links are shortcuts to tasks and can be added or removed to include a variety of topics.

DEPARTMENT NOTICES

Users with level 5 privileges can create notices and display them on their department Home Page. They can be configured to only display to certain groups of people or at specified times. Here is an example of a Department Notice that displays for the residents to download a form:
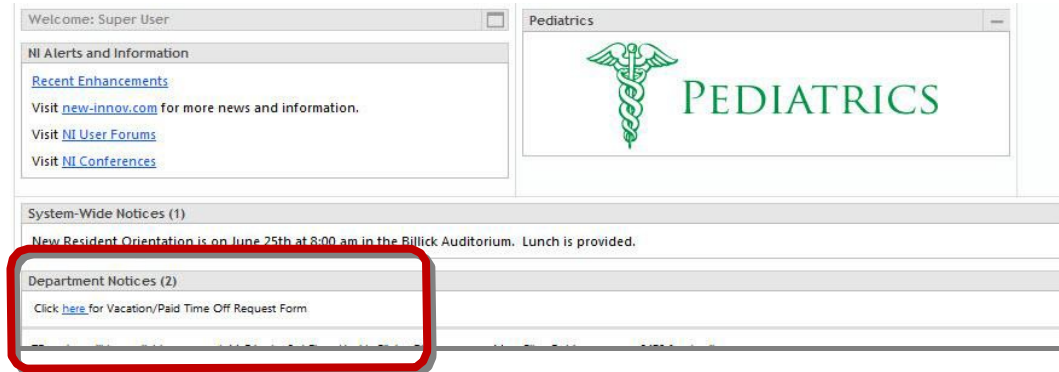
Create a Department Notice:

1. On your Home Page, click **Notices & Setup**
2. Click **New**
3. Enter the text of the department notice. Use the HTML editor to add colors, change font and font size.
4. Select the department/divisions where the notice is to be displayed.
5. Select the Status Types of those who will be able to view this message
6. Enter a Start Date and/or End Date to limit the time the message is posted. (The notice displays indefinitely if no start and end dates are entered.)
7. Click **Save**

DEPARTMENT MANUALS

You can load any documents you would like your staff to have access to within New Innovations. Most programs upload policy and procedure manuals and resident handbooks. Any user with at least level 1 privileges in any module can view Department Manuals.

1. From the Home Page go to *More > Resources*
2. Enter a display name for your file
3. Click **Choose File** and find the file you want to upload on your hard drive (12 MB maximum upload size)
4. Click **Open** or double-click the file name
5. Click **Upload File**
6. Folders can be created to store multiple documents
7. Files can be moved or saved to outside departments
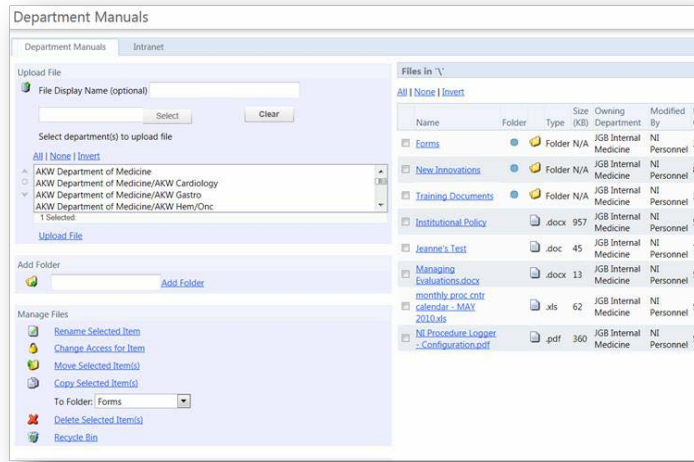
NOTIFICATIONS

The Notifications panel in the Welcome View may contain links directing residents and faculty to their assigned tasks, such as completing evaluations and confirming procedures when assigned. The notifications are generated by the module based on information the administrator enters in that module. For instance, in the Evaluations module, the administrator sets up the session and assigns people as evaluators. The evaluator gets the notice that the evaluation is ready for completion in this panel.
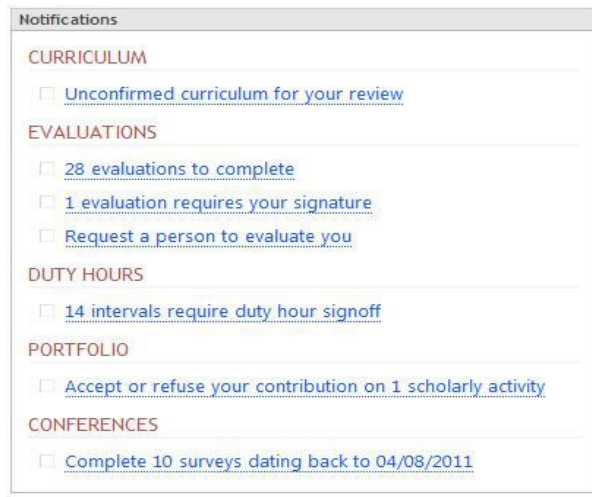
MESSAGES

A message bubble appears in the top right corner of your menu bar when you have a message from New Innovations. Click on the bubble and then click on the title of the message to read it. Close the window by using the **X** in the top right corner of the message.
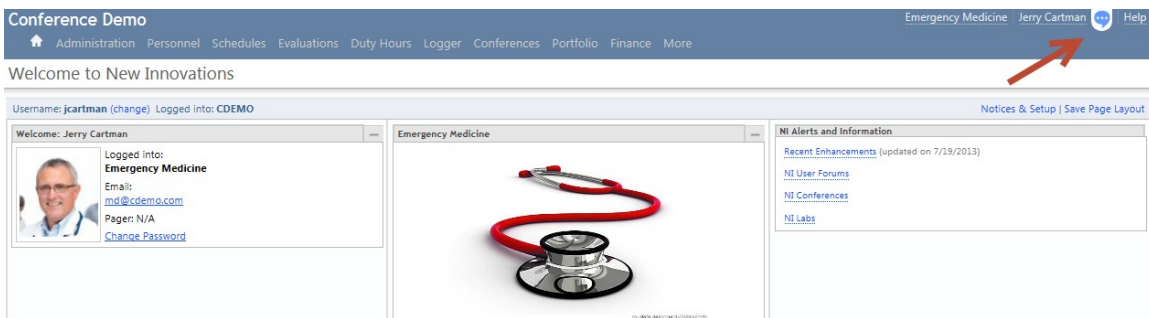
HELP

We have created several avenues for you to get help with the software. There is a Help link in the top right corner of every page of our software that will take you to the NI Support Center.
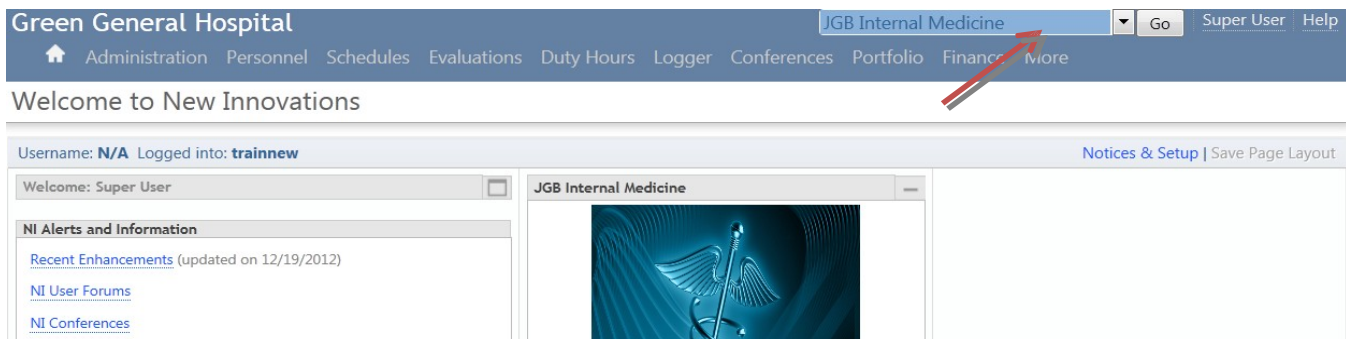
Under the Help link, you have the following options:

1. Contact Us – Send an email to the GME Office with detailed information on your question or issue.
2. Webinars – Access the training videos that are available by subscription.
3. Support Center – View our online documentation and access our Quick Start Guides, which are step by step instructions for most tasks you may need to complete in our software. You can also view specialized job aids and presentations in Additional Tools or consult other users in our NI User Forum.
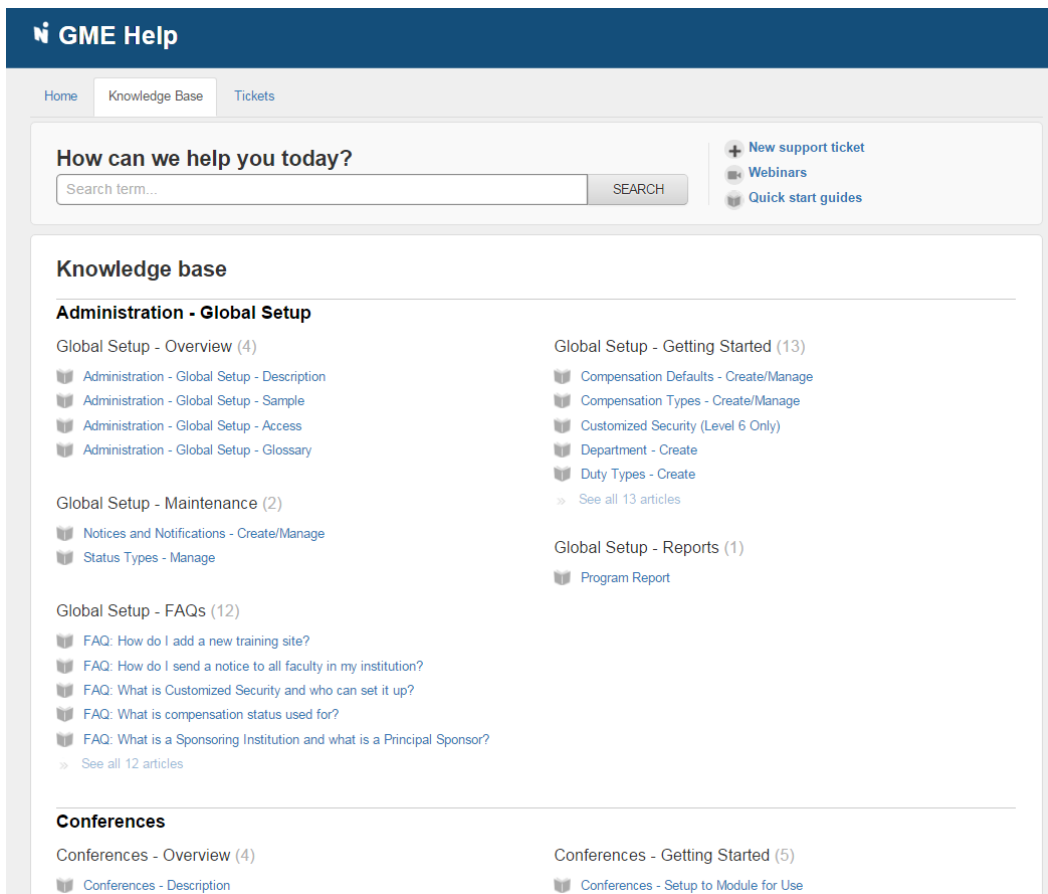
LISTS

You can use the Lists module to send emails and text pages to anyone in the database. You can also search for people by first or last name and access the following contact information directories:

- Personnel Directory
- Administrators Directory
- People who speak foreign languages
- Rotation Directory
- People with similar names
- Software usage report
- Procedure Privileges

Lists can be viewed by anyone with a Level 1 in any module. However, some institutions do not want their users to see this type of personal information, so the level 6 user use Customized Security. The most commonly used lists are the Administrators Directory and the email and paging features.

Key Concepts:

Administrator Directory – this list displays all users who have level 5 or 6 privileges in any module of the software. An email can be sent from this page if the recipient has an email address listed.

Email/Paging Feature –You can send group emails or text pages to selected recipients as long as they have primary email addresses or text pager numbers listed in Personnel Data.

ACCESS A LIST OF ALL ADMINISTRATORS

1. Go to *More > Lists*
2. Click **Administrator Directory**
3. This list can be sorted by name or department

EMAIL OR TEXT PAGE PERSONNEL

Send Emails:

1. Go to *More > Lists*
2. Click **Email**
3. Click **Add Recipients**
   a. Select people by name
   b. Optional: Click the funnel icon to find people in other departments
   c. Click the down arrow to add to the recipient list
   d. Optional: Click **Create group** to name and save your list of recipients for later use
   e. Click **Add recipients**
4. You will receive notification if any of the recipients do not have an email address in the software. Click their name to add one (if you have the access to their information)
5. Select people to CC
6. Enter email subject
7. Enter email text
8. Add attachments

Contact Groups

Create contact groups for people you frequently email.

1. In the **Contact Groups** tab click **New Contact Group**
2. Enter a name for the group
3. Select the people from the **Available Personnel** list
4. Use the single arrow key to add only those selected
5. Use the double arrow key to add everyone in the list
6. Use the funnel icon to add people from other departments to your contact group
7. Click **Save Group**

ADMINISTRATION

New Innovations unifies program and resident information into a centralized database. This database gives users a common interface to track residency accreditation information. The tools that control the way the database works are housed in the Administration module. Part of the initial preparation of the software is setting up some automated tasks like email notifications for expiring items.

Key Concepts:

> **View of Program Data** – The Dashboard provides a view of data entry progress, evaluation and duty hour compliance and more for your program on one page.

> **Centralized Accreditation Information** – Use the Program Administration pages to view accreditation information by participating site for CLER Visits.

DASHBOARD

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.

ACCESS AND OPTIONS

Users with level 4 privileges and higher can view the Program Dashboard. You will only be allowed to view the details for the charts if you have privileges in the module it represents. Go to *Administration > Dashboard*.

The Program Dashboard can be set as your home page when logging into the software. Here are the steps:

1. Go to *Notices & Setup > Personal Home Pages* tab
2. Verify that your department allows Personal Home Pages
3. If not, select your department and click the green arrow to permit it
4. Go to *Main > Administration*
5. Click the Dashboard tab
6. Access your Favorites menu
7. Click **Set As My Home Page**
8. Return

REPORTING TOOLS

Reporting tools or widgets are predefined reports used to gather data from many of the modules in New Innovations so you can monitor compliance for your entire database from one place.

You can click on any of the widgets to drill down to see specific data about people who are not in compliance. While looking at most detail pages, you have the opportunity to contact residents and faculty via email to encourage them to take specific actions. You can also correct your configurations and refresh the data on the charts one by one.

As a rule, all of the widgets (except for the Personnel Data widget) will show you information for people with Personnel Data records that:

- Have Resident Work Roles
- Are active (not archived)
- Are assigned Resident statuses except for: Incoming Resident, Alumni, or Grad

The Personnel Data Progress widget is intended to help you ensure your data is correct and your records do not have errors. So, if you have a record where the person has Resident as a work role as well as a Faculty or Administrator work role, you will see that person's record listed in the details. These items appear on the details list so they can be corrected and your personnel data can be as accurate as possible.

DASHBOARD REPORTING WIDGETS

Widget	Description
Evaluation Distribution 100% 100% 100% 83% (Nov, Dec, Jan, Feb) % Residents Matched	The **Evaluation Distribution** widget displays the percentage of residents matched for evaluations as both a subject and an evaluator for the current month and the past three months. Click the widget to access the details for each month, including: • The number of departments that have residents on the block schedule but have not included them in evaluations as both a subject and an evaluator • The names of the residents who are not fully participating
Completed Evaluations 381 Complete Evals YTD 34% · 5% · 63% On Time · Late · NET	The **Completed Evaluations** widget displays the percentage of residents and faculty members who have completed all evaluations assigned to them where the available date is within the past 90 days. Click the widget to access completion statistics.
FACULTY 60% Complete Evaluations Last 90 Days RESIDENTS 88% Complete Evaluations Last 90 Days	The **Faculty and Resident Complete Evaluations** widgets display the percentage of faculty and residents who have completed evaluations in the past 90 days. Click the widget to access faculty and residents with incomplete evaluations. Contact them from this page via email.
Duty Hour Violations Per Rule 80hr: 2 1 1 0 2 3 24+: 2 2 0 1 1 3 Call: 1 2 4 1 1 1 Short Brk: 3 3 3 3 1 2 Day Off: 0 0 0 1 0 2 Sep Oct Nov Dec Jan Feb	The **Duty Hours Violations Per Rule** widget displays violation counts by month and by rule for residents over the past six months. Click the widget to view a list of violations broken down by rule type. Email people with violations from this page.
RESIDENTS with Hours Logged Last 7 Days 88% Last 14 Days 100% Last Month 100%	The **Residents with Hours Logged** widget displays the percent of residents on the block schedule who have at least one duty hour log in each time frame. Click the widget to see a list of residents who have not logged hours. Send email reminders from this page
Resident Schedule Gaps Jul Aug Sep Oct Nov Dec Jan: 0 0 0 0 0 0 0 Feb: 1 Mar: 1 Apr May Jun: 0 0 0 Periods without a Scheduled Rotation	The **Resident Schedule Gaps** widget displays a count of residents with gaps in their schedules. Gaps are either periods of time without scheduled rotations or scheduled "unspecified rotations." Click the widget to see a list of residents with schedule gaps and edit their schedules.
Rotation Requirements 88% Residents Compliant	The **Rotation Requirements** widget displays the percentage of residents on the block schedule who are meeting rotation requirements if they are configured for your department. Click the widget to see a list of residents whose scheduled weeks do not meet the targets defined by the requirement.
Data Entry Progress Required Data 88%/100% IRIS Information 100%/100% Advancement 100%/100% Future Contracts 88%/100% 0 20 40 60 80 100 Residents · Incoming Residents	The **Data Entry Progress** widget displays a percentage of residents and incoming residents with complete data for specific sets of information in their personnel data records. Click the widget to see the residents who are missing information.
Expirations 3 Expiring Soon 1 Expired	The **Expirations** widget displays a count of DEA licenses, State licenses, and certificates that are about to expire and have already expired. Click the widget to see a list of residents with items about to expire or expired items. Send email reminders or access their expiring items to change expiration dates.

SOFTWARE SETUP

GLOBAL SETUP

All departments share global tables. The tables contain things that all users need when they track their residents. These tables are configured in the Global Setup section of the Administration module. In some databases, level 6 users restrict level 5 users from changing information for specific tables. If this is the case in your institution, you may not be able to view Global Setup at all.

Duty Types – These are general descriptions of work that residents perform. Duty types are used to label residents' duty hour logs and describe what activities they were engaged in (e.g. Call, Clinic, Rotation Hours, and Night Float). Duty Types are essential to the system when checking resident duty hour logs against the duty hour rules.

Institutions And Locations – Create lists of places where your residents and faculty spend their time.

Status Types – Every person listed in the database is given a status that indicates his or her role in the institution. A trainee's status type identifies the year in his or her current program.

Programs – Each program is listed on the Program screen with important information about the type of program (residency or fellowship), duration of training, advancement date and status definition.

LOCAL SETUP

Local setup is unique to the department you are logged into. Local tables are configured and managed by the administrator of the department.

Email Notifications – Go to *Administration > Software Setup > Local Setup > Email Notification*. The Email notifications link is where you can manage email reminders to staff for the daily consolidated emails and notification of expiring items. The page is set up with tabs on the left for each item that can have notifications associated with it.

Consolidated Email Notifications – The first tab is for the consolidated email. Rather than sending a separate email for each task a person needs to do in the software or for each notification, we created this consolidated email that groups all notifications into one daily email. Administrators can create their own message that appears at the beginning of the consolidated email.

Notifications for Expiring Items – If you keep track of your residents' medical licenses and certifications in our software, you can have the system automatically notify them of the expiration dates and receive a courtesy copy of the notification.

PERSONNEL

The Personnel module is where information about people is maintained. Much of the information entered into each individual's Demographics Record is also used in dropdown lists and multi-select boxes throughout the suite.

Key Concepts:

Storage of data – Data for faculty and residents is stored in their personnel data file. This information is similar to what you might find in a person's paper-based personnel file such as emergency contacts, phone and pager numbers, education history, immunizations, etc. Because this data is stored electronically, it can be easily accessed and included in various reports.

Organization – Coordinators can organize faculty and resident data for reporting to their program, ACGME, ABFM and other oversight agencies.

Privileges – Privilege levels control the user's access to the software.

Onboarding – Create and distribute checklists to new hires or in-rotators. To review the GME onboarding checklists, go to *Personnel > Checklists > Onboarding*.

Training Records – The training record establishes vital information about each person's progression through training including post graduate year, status and the dates of training.

Each person is given access to the software according to what they will be expected to do:

Level 1 (Clerical/Nurse/Operator)	• Generate lists of personnel • View daily departmental schedules • Access procedure credentials reports, • Edit your own Personnel Data items if permitted.
Level 2 (Residents/Fellows)	• Log duty hours • Log procedures • Complete evaluations • Complete conference surveys • Make schedule requests • Generate personal reports • View conferences and daily department schedules
Level 3 (Faculty)	• Supervise procedures • Complete evaluations • View conferences and complete surveys • Take personal conference attendance • View daily department schedules • Generate personal reports
Level 4 (Low Access Administrator)	• View demographic records for the department • where privileged • Create/edit block and assignment schedules • Complete evaluations • View completed evaluations • View evaluation results for others in department where privileged (anonymous results can be viewed without identifying the evaluator if permitted by the session administrator)
Level 5 (High Access Administrators/Coordinator)	• Setup and manage modules as allowed by GME • Access to Program Dashboard • Create/edit personnel files • Create/edit block/assignment schedules • Manage evaluations • Create/edit questionnaires • View completed anonymous evaluations • Create report templates • Create assignment definitions and templates • Schedule and manage conferences • Take conference attendance
Level 6 (GME or Total Access Administrator)	• Access to all departments/divisions in the database • Access to GME and Program Dashboards • Create and maintain global lists of information in Administration • Configure customized security settings • Combine duplicate demographic records • All level 5 tasks

ADD PEOPLE TO THE SOFTWARE

Resident records can be added in various ways:
- Manually entered by administrator
- Import data from ERAS with .txt file
- Import data from ERAS using API (Application Program Interface)

If Level 6 administrators decide to limit the program coordinators' access to the resident files, you can still allow the coordinators to do the ERAS import using the controls in Customized Security.

One record only... Every New Innovations user should have only one Personnel record. Having more than one record causes confusion for both the user and administrators.

ADD RESIDENT MANUALLY

Step 1: Essential Information
1. Go to *Personnel > Add New Person*
2. Enter Last Name, First Name
   - Middle Name is required, if using IRIS
3. Optional: Enter Social Security or Social Insurance Number
   - SSN is required, if using IRIS
4. Select Resident Work Role from the drop down list
5. Click **Continue**

Step 2: Search for Duplicates
1. The system automatically checks for duplicate records:
   - *SSN/SIN Search Results* – verifies the SSN entered for this person is not already in use
   - *Name Search Results* –verifies the name entered for this person in not already in use
   - *Extended Search Results* –searches database for similar last or first names
2. If no duplicates are found, click **Continue Adding Information** to proceed.
3. Click **Cancel and Return** if the person is already in the database.

Step 3: Additional Information
1. Enter the Program Information and other details. All fields with a red asterisk are required fields
2. Fill in the IRIS information if required by your GME office
3. Click **Add Person** to save the record

IMPORT DATA FROM ERAS USING API (APPLICATION PROGRAM INTERFACE)

The DIO or DME of your institution will approve the use of the ERAS API option before you import. You will be notified in your PDWS when authorization is given. Then you may begin the import.

Set Import Values

1. Go to *Personnel > Tools > Import ERAS Data*
2. Choose the appropriate program from the dropdown box. The accreditation code must match the program or the button to make the connection to ERAS will not work.
3. The status type is entered for you based on the program status mapping.
4. The start date is entered for you based on the advancement section in the program.
5. The Post Graduate Year defaults to 1. Leave it at 1 if most people you are importing have that PGY.
6. Select the employer from the dropdown list.
7. Select a Compensation Status.
8. Enter the start/hire date (Optional).
9. Keep the box checked to have the computer create a Username and Password on import.
10. Select *Connect to API*.

ADD FACULTY OR NURSES

Step 1: Essential Information

Go to Personnel > Add New Person

1. Enter Last name, First name
2. SSN/SIN is optional
3. NPI is optional
4. Select Work Role from the drop down list
5. Click **Continue**

Step 2: Search for Duplicates

1. The system automatically checks for duplicate records.
   - *SSN/SIN Search Results* – verifies the SSN entered for this person is not already in use
   - *Name Search Results* –verifies the name entered for this person in not already in use
   - *Extended Search Results* –searches database for similar last or first names
2. If no duplicates are found, click **Continue Adding Information** to proceed.
3. Click **Cancel and Return** if the person is already in the database.

Step 3: Additional Information

1. Enter *Additional Information*. All fields with a red asterisk are required fields.
2. Select the appropriate Privilege Level Preset
3. Continue adding **required** information:
   a. Primary Email
   b. Work Phone
   c. Date of Birth (for faculty and program administrators only)
   d. Credentials
      i. Click **Add a credential**
      ii. Select appropriate credential
      iii. Click **Add**
4. Click **Add Person** to save the record.
5. All personnel added go into Pending status awaiting GME approval.

LOGGING ON

- Internal Faculty will log on using their UTHealth user ID and password (see page 7).
- External faculty will log on using their NI user name and password.

TRAINING RECORDS

A training record is automatically added when you add a person with the Work Role of Resident. However, you may need to add additional information such as training completed at another institution.

Add External Records

Add an external training record for a person who did all or part of their training at another institution.

1. In the Residency section of the record, click on **Training Record**
2. On the Residency/Fellowship tab, select **Add External Record** from the dropdown list
3. Select the accrediting body
4. Select the sponsor. This list comes from the accrediting body chosen in step 3. It is not a list of sponsors from your database.
5. Select the program. The program list is based on the accrediting body and sponsor selected above.
6. Enter the date range the person was at the other institution
7. Click **Save**

ADD GAPS IN TRAINING

Add a gap in training for people who left the program and came back or took a break between programs.

1. In the Residency section of the record, click on **Training Record**
2. On the Residency/Fellowship tab, select **Add Residency Gap** from the dropdown list
3. Enter the date range the person was not in training
4. Enter any notes about why the gap in training occurred
5. Click **Save**

MANAGE EXISTING RECORDS

You may have people who are off-cycle or take LOAs. Use the following processes to create an accurate representation of the training record.

CONVERT RESIDENCY HISTORY TO TRAINING RECORDS

Residents and fellows need to have a training record if you want to run historical reports or create verification of training letters.

1. Go to *Personnel > Personnel Records*
2. Select the resident
3. Click **Training Record**
4. Click the **Legacy Residency** tab
5. Click **Convert**
6. Click **Apply**

Note: You will not be able to convert the Residency History Record into a training record if there are problems with the record, such as gaps or overlapping dates. You will get a notice stating that there are problems with the legacy records.

Click Close on the notification screen. A new column will appear on the Legacy tab called Failed Conversion Reasons. Edit the Residency History Record to fix the stated problem and click **Convert** again.

UPLOAD FILE ATTACHMENTS

There are a minimum of three fixed folders that may be displayed for any record in addition to any sub-folders that are created. Fixed folders are indicated with a blue folder icon and may not be deleted or have their access rights changed.

ATTACHED FILES DEFAULT FOLDERS	
Folder	Description
Attached Files Folder	Displayed for all users authorized to view the record. Sub-folders may be restricted by Level 5 or 6 administrators.
Department Folder	Displayed for all individuals who are viewing the record logged into a specific department. A record may have different sets of attached files tracked by more than one department.
Program Director Folder	Displayed for the current Program Director only. The current program of the user determines who is designated as the current Program Director in the Program entry in Administration Note: If personnel are assigned a new program, files are not automatically transferred to the new Program Director folder.

BLOCK SCHEDULES

The Block Schedule Module allows you to manage annual rotation schedules and create customized display options. The information on the block schedule is used throughout the RMS:

Online and Desktop versions – Block schedules can be created using the block schedule module online or the desktop MedScheduler.

Ownership of rotations – We recommend that Rotations and their preceptors reside in the same department. Each department puts their faculty on the block schedule so when a resident rotates with that faculty member, they can be automatically matched for evaluations.

Academic Years – An academic year defines the training year for each program and is used as a calendar to supply default start and end dates in the block schedule, evaluations and other modules.

Rotation Names – Each rotation is named so it identifies the department that owns it. New rotations may be requested using the NI New Rotation Setup Form.docx form found on the GME web site.

Rotation Favorites – Rotation Favorites are used to streamline scheduling and evaluations. Favorites can include frequently used rotations from one department and other departments.

CREATE ACADEMIC YEARS

1. Go to *Administration > Software Setup> Local Setup > Academic Years > Recurring tab*
2. Click **New**
3. Select the start date of the recurring pattern for your academic year
4. Select how many intervals to use
5. Select when the system should create the new year
6. Your email address is entered for you so you can receive an email when the new year is created. Enter other people's addresses if they should be notified as well.
7. Each time a new year is created, it is named using the start and end date year. If you want something additional added to the year, enter it in the text box. An example would be "PRG-1." When the new year is created it will display as "2013-2014 PRG-1."
8. Click **Save Changes**

ROTATION FAVORITES

1. Go to *Administration > Software Setup > Rotation Favorites* (or go to *Schedules > Rotation Favorites* under Block Scheduling, Setup)
2. Check the list to make sure all of the rotations you use for scheduling appear in the list
3. To add rotations, select the department that owns the rotation
4. Click *Adjust Rotations List*
5. The rotation names from the selected department will be listed in the box on the right
6. Highlight the rotation to add
7. Click *Add Selected Rotations to Favorites*

CREATE SCHEDULES

CREATE RESIDENT SCHEDULES

1. Go to *Schedules > Schedule Rotations*
2. Select a person from the dropdown list
3. Click **Option Two**
4. Select the rotation name from the Rotation dropdown list. If the rotation is not in the list, select the department that owns the rotation from the Rotation Department list. Select the correct rotation.
5. Click **Save and Continue**
6. Continue building the schedule in this manner.

CREATE FACULTY SCHEDULES

1. Go to *Schedules > Schedule Rotations*
2. Select a person from the dropdown list
3. Click **Option Three**
4. Enter the start and end dates of the academic year.
5. Select the rotation name from the rotation dropdown list.
6. Click **Save and Return**

WHY PUT FACULTY ON THE BLOCK SCHEDULE?

Faculty members are included on the rotation schedule when they are responsible for evaluating residents for particular rotations. Their presence on the schedule allows them to be automatically matched up with the residents they are to evaluate. Since Faculty usually precept the same rotation all year, you will only have to enter one rotation for the entire year. However, if a faculty member precepts more than one rotation, add all rotations to the faculty member's schedule. He or she will only be matched with residents they work with throughout the year.

EDIT SCHEDULES

1. Go to *Schedules > Schedule Rotations*
2. Select a person from the dropdown list
3. Place a checkmark in the box(es) where edits need to be made
4. Click **Edit**
5. Make your changes
6. Click **Save**

OVERRIDE BILL TO LOCATION

OVERRIDE A BILL TO LOCATION ON A ROTATION

1. Go to *Schedules > Schedule Rotations*
2. Select a person from the dropdown list
3. Click **Override** (far right) for rotation needing to be changed
4. In *Overrides* section, select new Bill To from drop down box
5. In *Percentage* box, enter 100.
6. Click **Add**
7. Click **Save**

VIEW OVERRIDE

1. Go to *Schedules > Schedule Rotations*
2. Select a person from the dropdown list
3. Click **View Override** (far right)
4. Confirm that Override Bill To location is correct
5. If it is correct, click **Cancel** to go back to previous screen

EDIT OVERRIDE

1. Go to *Schedules > Schedule Rotations*
2. Select a person from the dropdown list
3. Click **View Override** (far right)
4. In *Overrides* section, click ⊗ to delete current override

5. Select new Bill to from drop down box
6. Enter Percentage
7. Click **Add**
8. Click **Save**

DELETE OVERRIDE

1. Go to *Schedules > Schedule Rotations*
2. Select a person from the dropdown list
3. Click **View Override** (far right)
4. Click ❌ to delete current override
5. Click **Save**

VIEW SCHEDULES

COORDINATOR VIEW

Go to *Schedules > View Schedule* to view the entire schedule.

Custom Schedules can be created by clicking **New** and selecting additional filters.

Person	July (07/01/2014 - 07/31/2014)	August (08/01/2014 - 08/31/2014)	September (09/01/2014 - 09/30/2014)	October (10/01/2014 - 10/31/2014)	November (11/01/2014 - 11/30/2014)	December (12/01/2014 - 12/31/2014)	January (01/01/2015 - 01/31/2015)	February (02/01/2015 - 02/28/2015)	March (03/01/2015 - 03/31/2015)	April (04/01/2015 - 04/30/2015)	May (05/01/2015 - 05/31/2015)	June (06/01/2015 - 06/30/2015)
Faculty (JGB Internal Medicine)												
Benson, W	AMB Ward 2	AMB Ward 2	AMB Ward 2	AMB Ward 2	AMB Ward 2	AMB Ward 2	AMB Ward 2	AMB Ward 2	AMB Ward 2	AMB Ward 2	AMB Ward 2	AMB Ward 2
Brooks, A	AKW: DM: IM: ID-CDC Endo Consults	AKW: DM: IM: ID-CDC Endo Consults	AKW: DM: IM: ID-CDC Endo Consults	AKW: DM: IM: ID-CDC Endo Consults	AKW: DM: IM: ID-CDC Endo Consults	AKW: DM: IM: ID-CDC Endo Consults	AKW: DM: IM: ID-CDC Endo Consults	AKW: DM: IM: ID-CDC Endo Consults	AKW: DM: IM: ID-CDC Endo Consults	AKW: DM: IM: ID-CDC Endo Consults	AKW: DM: IM: ID-CDC Endo Consults	AKW: DM: IM: ID-CDC Endo Consults
Buchanan, J	Ward 2 CCU	Ward 2 CCU	Ward 2 CCU	Ward 2 CCU	Ward 2 CCU	Ward 2 CCU	Ward 2 CCU	Ward 2 CCU	Ward 2 CCU	Ward 2 CCU	Ward 2 CCU	Ward 2 CCU
Durbin, N	Consults ANES:ANES	Consults ANES:ANES	Consults ANES:ANES	Consults ANES:ANES	Consults ANES:ANES	Consults ANES:ANES	Consults ANES:ANES	Consults ANES:ANES	Consults ANES:ANES	Consults ANES:ANES	Consults ANES:ANES	Consults ANES:ANES
Imdorf, N	INPT Endo Consults	INPT Endo Consults	INPT Endo Consults	INPT Endo Consults	INPT Endo Consults	INPT Endo Consults	INPT Endo Consults	INPT Endo Consults	INPT Endo Consults	INPT Endo Consults	INPT Endo Consults	INPT Endo Consults
Jones, A	Gastro INPT	Gastro INPT	Gastro INPT	Gastro INPT	Gastro INPT	Gastro INPT	Gastro INPT	Gastro INPT	Gastro INPT	Gastro INPT	Gastro INPT	Gastro INPT
Tirrell, R	Ward 1	Ward 1	Ward 1	Ward 1	Ward 1	Ward 1	Ward 1	Ward 1	Ward 1	Ward 1	Ward 1	Ward 1
PRG 1 (JGB Internal Medicine)												
Cleveland, G	ANES:ANES	Card Consult VA	MICU	PED:NEO:NWBORN	MICU	CARD	Ward 2	PED:ADOL	PED:FAM VIOLENCE	PED:NEO:NWBORN	MICU	Consults
Dalton, V	AMB	CARD	Consults	INPT	MICU	RES	Ward 1	Ward 2	PED:NEO:NWBORN	DS:SURG:NF	Card Consult VA	Endo Consults
PRG 2 (JGB Internal Medicine)												
Baker, R	CARD	MICU	Ward 2	PED:ADOL	MICU	Consults	DM:GERI:GERI	Ward 2	PED:ADOL	PED:FAM VIOLENCE	PED:NEO:NWBORN	MICU
Gomez, M	Ward 1	PED:ADOL	AMB	Endo Consults	Endo Consults	Card Consult VA	Card Consult VA	DS:SURG:NF	Card Consult VA	MICU	Ward 1	ANES:ANES
Jones, A	INPT	AMB	Gastro	AMB	INPT	DS:SURG:NF	MICU	Endo Consults	ANES:ANES	Endo Consults	ANES:ANES	Ward 1
Lemon, J	MICU	INPT	AMB	Gastro	PED:NEO:NWBORN	AMB	CARD	Gastro	PED:FAM VIOLENCE	Consults	Ward 2	PED:ADOL

RESIDENT AND FACULTY VIEW

Residents and Faculty will go to *Schedules > My Rotations* to view their own block schedule.

MEDSCHEDULER

Contact your LAN Manager to request installation on your desktop computer. MedScheduler cannot be installed on a Mac (unless you are running Parallels or using BootCamp).

New Innovations offers a desktop scheduling application that uses "click and drop" technology for building both resident and faculty schedules. There are Help demos within the application that you can view for more detailed instructions.

Go to *Schedules > Install MedScheduler* to download MedScheduler to your computer.

LAYOUT OF MEDSCHEDULER

HOW TO CREATE A SCHEDULE BY PERSON

1. Click on the By Person tab

2. Select a Rotation from *Rotation Favorites*

3. If the rotation name is NOT included in the Rotation Favorites list, click **All Rotations** at the bottom of the list
4. Click on the **+** sign next to the Department/Division to expand to see the rotations
5. Select a Rotation
6. Find the person to schedule and click in the appropriate cell

MANAGE ROTATIONS

CHANGE THE ROTATION START AND END DATES

Change the start and end dates to create split rotations or extend rotations that are two or three months long.

1. Schedule the first rotation as described above.
2. Click on the scheduled rotation in the cell for the specific block interval to display the information in the *Properties* panel.
3. Change the end date in the *Properties* panel on the right to the correct end date of the rotation
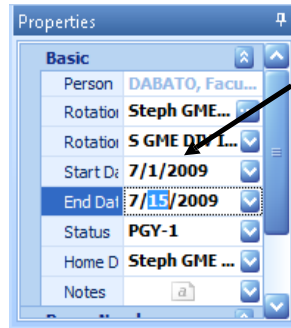
4. Click back in the cell for that interval
5. The end date of the rotation appears in parenthesis after the rotation name

SCHEDULE NON–PRIMARY ROTATIONS

1. Select a rotation
2. Find the person and block interval
3. Right-click on the block interval
4. Select *Schedule (Person's name) on a non-primary (Rotation name) rotation*

DELETE A SCHEDULED ROTATION

1. Find the person's name and rotation to delete
2. Right-click on the rotation

3. Choose the correct delete option
   - Delete this rotation
   - Delete all selected rotations
   - Delete all rotations for this person

REPLACE ROTATIONS

1. Find the person's name and rotation to replace
2. Right-click on the rotation being replaced and select *Replace the rotation with [the correct rotation name]*

SWAP ROTATIONS

1. Find the person's name and rotation to swap
2. Click the cell with the rotation to swap and then hover over the edge of the cell; a small gray box will appear at the bottom of the arrow

3. Drag the cell to the rotation instance you wish to swap

4. Release the mouse to swap the rotations

CURRICULUM

The Curriculum module is used to post Goals and Objectives for rotations. Any resident or faculty who is on the Block Schedule for the rotation can access the posted curriculum. Once the person has read the document, they can confirm they have read and understood the goals and objectives.

Coordinators can upload documents up to 12 MB in size. Documents larger than 12 MB should be divided into smaller documents and posted.

CREATE CURRICULUM

1. Go to *Schedules > Curriculum*
2. Click **New**
3. In the text field, enter the **name** of the curriculum definition.

Assign Curriculum by Status and Rotation

1. Select **statuses** of the people who are required to read the curriculum.
2. Select the name of the **rotation** the curriculum applies to.
3. Narrow the list to only your department's rotations by checking the box underneath the list labeled *Limit choices above to rotations from (your department)*.

Email, Confirmation and Notifications

1. Select the notification and confirmation method:

   - "Send automatic email notifications and allow people to confirm this curriculum ___ days before the rotation begins." A link to the curriculum will appear on the person's Home Page on the day the email is sent.

   - "Send an email notification when this Curriculum Definition is saved for rotations that start between [start date] and [end date]." Sends a notification to the people assigned the curriculum and creates a view curriculum link on their Home Page as soon as the curriculum is saved.

2. To receive an email confirmation of those notified, check the box that says "If sending notification now, also send a confirmation email to this email address" and fill in the email address of the person to receive the confirmation.

Set Active Dates

1. Set the **dates** for the period of time the curriculum should be used. Active dates are optional and do not need to be configured unless the user wishes to apply the curriculum only to a specific date range.

   - Apply Curriculum to rotations that begin on or after this date: checks the block schedule for people whose rotations begin on or after the specified date.

   - Apply Curriculum to rotations that begin on or before this date: checks the block schedule for people whose rotations begin on or before the specified date

Upload Files

1. Click **Select** to find the file on your computer. Files can be no larger than 12 MB.
2. Click **Save New Curriculum** to upload the file and save the new curriculum definition.

HOW TO VIEW WHO HAS BEEN ASSIGNED A CURRICULUM

1. Go to *Schedules > Curriculum* and click on the **Assigned People** link.
2. List includes the date range for the assigned curriculum and displays the date the person confirmed reading the curriculum.

CONFIRMATION REPORT

1. Go to *Schedules > Curriculum > Confirmation Report* tab
2. Specify the **date range** or an **academic year**.
3. Select the **rotations**.
4. Select the **statuses**.
5. Define the date range of review considered acceptable.
6. *Show people that have Confirmed or Not Confirmed* displays people who have or have not confirmed reading curriculum assigned to them.

7. *Show people that have Confirmed* displays people who have confirmed reading curriculum assigned to them.
8. *Show people that have Not Confirmed* displays people who have not confirmed reading curriculum assigned to them.
9. Click **View Report**
10. The report displays people's names in red who have **not** read curriculum assigned or have read and confirmed their curriculum **outside** the specified acceptable date range
11. Send an email to people who have not read curriculum by checking the box next to their name
12. Click the link **Send Email Reminder** to send the email

LOGGING PAID LEAVE

Vacation and other paid leave time (see below) may be logged by either the administrator or requested by the resident in the Assignment Schedule Module.

GME Education Leave (GME-EDL)	GME Military Leave (GME-MIL)
GME Vacation (GME-VAC)	GME Sick (GME-SCK)
GME Bereavement (GME-BRV)	GME Jury Duty (GME-JRY)

Residents/Fellows must have Level 2 privileges in Assignment Schedules in order to *Make a Request* for paid time off. Reviewers must have Level 3 privileges in Assignment Scheduled in order to receive requests to review/approve/deny.

When residents want to request vacation, etc., they will request to be ON (not off) a particular assignment. When the reviewer approves the request, it is automatically added to the assignment schedule.

To report on the scheduled assignments that have been requested and approved:

Go to *Schedules > Assignment Scheduling > Tools > Schedule Analysis*
Select your desired date range
Select the desired Assignments
Typically the other selections can remain at their defaults. Change as necessary or desired.
Click **View Report**

DUTY HOURS

Residents and fellows can keep track of the hours they work in our Duty Hours module. Administrators can put rules in place to check the residents' duty hour logs against duty hour regulations. The system can then notify an administrator immediately when violations of the rules occur. Reports can be generated about hours logged and violations of the rules.

Recording Resident Logs – Residents have three data entry options when logging their duty hours. They can also use a Smart Phone or an Android.
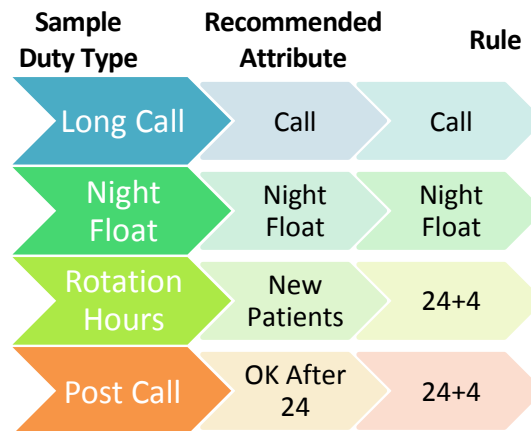
Checking Compliance – The administrator can configure any of the rules so that they are properly enforced when logs are created.

Notifications – Automatic email notifications can be configured so that reminders will be sent to the residents/fellows on a recurring pattern.

Duty Types are general descriptions of the work residents and fellows do, such as "Shift" or "Rotation Hours." They are in a global list, which means that they can be used by all departments. New Innovations uses duty types to categorize, track, and report on hours worked.

Duty Type Attributes are flags applied to duty types to identify them as types of work that require special handling during duty hour rule checking.

For example, one duty hour rule states that residents may only be scheduled to be on "in-house call" no more frequently than once every three days.

Sample Duty Type	Recommended Attribute	Rule
Long Call	Call	Call
Night Float	Night Float	Night Float
Rotation Hours	New Patients	24+4
Post Call	OK After 24	24+4

HOW ARE RULES CHECKED?

ACGME

The ACGME has clarified in their FAQ's that all averaging rules must be checked within the confines of a rotation's start date and end dates. Specifically, they say that "Averaging must occur by rotation. This is done over one of the following: a four-week period; a one-month period; or the period of the rotation if it is shorter than four weeks."

Based on this statement, we have established the following requirements in our software:

- Rules are only checked when residents are on a rotation. This means that **all residents must have a primary block schedule entered into New Innovations**.
- All duty hour reports will return data grouped by rule-checking periods, i.e. in four-week increments, one- month increments, or for the rotation period (if shorter than four weeks).
- Long rotations will be broken down into contiguous four-week check periods. For example, a 12-week rotation would be broken down into three four-week check periods. A 15-week rotation would be broken down into four four-week check periods, the last check period being the last four weeks in the rotation.

JUSTIFICATIONS FOR STAYING LATE OR RETURNING EARLY TO DUTY

The ACGME requires that residents must document why they stayed over or came back on duty early and Program Directors must review every occurrence (VI.G.4.b)(3)). Here is a general overview of the process in New Innovations:

- Residents submit a justification for staying over 24 hours or coming back to work with less than 8 hours off
- Administrators Review justifications
  - Request information
  - Excuse violations
  - Decline justifications
- Residents and Administrators report on justifications

REASONS

There are several reasons why a resident might stay on duty past the 24-hour mark and continue to work with patients:

- To observe or participate in a rare educational opportunity
- To serve a single patient who is very ill or unstable
- To serve a patient and his or her family for humanistic reasons
- To cover a scheduling gap so that other personnel might take a break

The first three reasons are considered good reasons for staying over or coming back early, according the ACGME.

Cited from section VI.G.5 from the ACGME Common Program Requirements VI.G.4.b)(3). http://www.acgme-2010standards.org/pdf/Common_Program_Requirements_07012011.pdf.

THE RESIDENT LOGS A VIOLATOIN THAT IS ELIGIBLE FOR JUSTIFICATION

If intermediate or final year residents log more than 24 hours on duty, they will receive this message across the top of the page:

When they click the notification, they will be taken to this screen:

Justify: Submit an explanation as to why you worked with patients past the 24 hour mark.

Defer: Residents can decide not to submit a justification, considering this violation as a true violation of the duty hour rules. They can enter a comment and then click **Submit Justification**.

Zach Micale logged Call on Wednesday 4/20/2011 at 7:00 AM to Thursday 4/21/2011 at 8:00 AM

ACGME 24+4 (2011) violated in JAS Surgery

25 Consecutive Hour(s) Worked. May Not Work Over 24 Hour(s) Doing Non-Transitional Activities.

Justification & Comments

There are no comments to display

Add a new comment

Remaining Characters: 2,200

This is a **New Violation.**
The violation is eligible for justification but one has not yet been submitted.

[Submit Justification] [Cancel]

THE ADMINISTRATORS RECEIVE NOTIFICATIONS

When the resident submits a justification for the violation, Administrators (who have level 5 privileges in Duty Hours), Program Directors, and Associate Program Directors will receive this email immediately:

Subject: Duty Hour Justification Submitted

Wyatt Alden has submitted the following comment as justification for your review.

Comment: *I stayed over to participate in a rare educational activity*

You may bypass the normal login procedure to immediately access the comment., or you may log into the RMS normally using your Institution Login ID, Username and Password.

Note: If this is the first time you have used an Auto-Login link, you will be prompted to log in conventionally for confirmation purposes.

To get the auto-login link in the email, make sure to go to Basic Configuration and allow Auto-login links.

How do we know who your Program Directors and Associate Program Directors are? We look in Administration > Programs to see whose names are entered for each of these roles. If you have not identified your PD and APD in Program Demographics, we recommend doing it. You may need to ask your level 6 user to change this for you.

ADMINISTRATORS REVIEW JUSTIFICATIONS

Administrators can use the auto-login link to access justifications or log into New Innovations to access and review justifications.

1. Go to *Duty Hours > Violations*
2. Click the **Justifications** tab
3. Click **View** to review the justification
4. Enter a comment
5. Change the status of the violation to:
   a. Justification Accepted – Remove the violation from this duty hour log. The system will no longer see this log as causing a violation.
   b. Justification Declined – The justification does not fit the criteria for permissible activity. Select this option to let the violation stand.
   c. Needs information – Send the violation back to the resident for more information. Make sure to enter a comment to explain why you are requesting more information and to email the resident. Just changing the status to "Needs Information" will activate the red bar on the logging page but it will not generate an email to the resident.
   d. Pending Review – No administrative action has been taken yet. This violation is under review.
6. Click **Save**

CAUSES FOR VIOLATIONS

Residents can also add a cause to any violation for more explanation of why it may have occurred. Administrators can run trending reports on violation causes.

1. Go to *Violations*
2. At the bottom of the page under the Violations section, find the log and click on the rule.
3. Add a cause by clicking the link under **What caused this violation?**
4. Select the cause and click **Add**.

CONFIGURE THE DUTY HOURS MODULE

The GME Office has configured the Basic Configuration and the Rule Configuration. For questions about the Duty Hour configuration, please contact the GME Duty Hour Administrator.

LOG HOURS BY DUTY TYPE:

Duty hours are configured for the residents to log hours by the Duty Type. The duty types available for your residents to use can be customized to make available only the relevant duty types for your program. Please contact the GME Duty Hour Administrator to customize for your program.

CONFIGURE NOTIFICATIONS

GME has configured "GME-Required" notifications for all programs. Programs may add program personnel to the distribution to these or configure additional notifications, but should not modify or delete the notifications in any other way.

LOGGING NOTIFICATIONS

1. Go to *Duty Hours > Notifications > Logging*
2. **Enable** reminders
3. Click **New** Duty Hour Notifications
4. Enter a **Name** for the notification, such as who is to receive the email.
5. Set the distribution rules

Enter the number of days after signoff is available to send email

Recurring Pattern: Check this option to establish a recurring pattern beyond the original number of days entered. Once selected, additional options become available.

    a. "Send Email every X days" Enter how often to send email
    b. Send first reminder at X days with no logging activity
    c. Repeat the notification every X days
    d. "No End Date" sends the email notifications indefinitely until signoff is completed.
    e. "End by X" automatically stops sending email notifications as of that date even if signoff is not complete.
6. Select the statuses of the recipients
7. Select CC recipients

Advisor information is from Personnel Data and Program Director and Coordinator information is from *Administration > Global Setup > Programs.*

8. Enter Subject of the email notification
9. Enter the body of the message
    a. Insert a link to let the recipient log in from the email
10. Click **Save**

VIOLATIONS NOTIFICATIONS

1. Go to *Duty Hours > Notifications > Violation*
2. **Enable** reminders
3. Enter a **Name** for the notification, such as who is to receive the email.
4. Select the who should receive the notification
    a. Program Coordinator
    b. Program Director
    c. Any level 5 administrator
    d. Additional individual Recipients
5. Click **Save**

JUSTIFICATION REMINDERS

1. Go to *Duty Hours > Notifications > Justification*
2. **Enable** reminders
3. Enter a **Name** for the notification, such as who is to receive the email.
4. Select the who should receive the notification
    a. Program Coordinator
    b. Program Director
    c. Associate Program Director
    d. Any level 5 administrator
    e. Additional individual Recipients
5. Click **Save**

DUTY HOURS START PAGE

1. Go to *Duty Hours > Dashboard*

USAGE PANEL

This panel is divided into 6 smaller panels representing the current 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 this may be a problem area. The first line is residents who have not logged their duty hours this week. The yellow line shows residents who have logged their duty hours for three days or less. And 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 see who has not recorded any duty hours for specific days. You can also email someone directly from this report which is sent immediately instead of the next morning. If you do not see an email icon for a person, that means they do not have a primary email address in personnel data.

VIOLATIONS AND JUSTIFICATIONS PANELS

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. This panel lets you know if there is any action to take. 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 broken, 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.

COMPLIANCE PANEL

There are two pieces of information on this panel:

- A breakdown of resident compliance for each duty hour rule. If you click this section, you get the new compliance report.
- The Program Information summary. From here, you can see 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 is information can be used to complete a program information form.

THE VIOLATIONS AND TRENDS REPORTS

The Violations report lists all residents who have logged violations in your department for the selected time frame.

1. Go to *Duty Hours > Reports > Violations*

- **Last Week:** Any violations starting in the previous calendar week, starting on the day indicated as the first day of the work week in Basic Configuration
- **Last Month:** Any violations logged in the previous calendar month
- **This Month:** Any violations logged in the current calendar month
- **Custom Date Range:** Select this to designate a date range you would like to use to view violations from

By default, this report lists the following information for each violation:

- Resident's name and status
- The Duty Hour rule that was violated and whether the violation is justifiable
- A description of the violation
- Comments attached to the log
- The duty type used in the log that caused the violation
- The start date of the log that caused the violation
- The name of the rotation

Click **Custom Filters** to add or remove columns and change who appears on the report.

- Select specific rules and violations to view
- Limit statuses to narrow your focus to a specific group of people
- View violations for more than one department
- Show log details
- Include rotators
- List locations
- Show or hide columns

EVALUATIONS – QUESTIONNAIRES

We provide innovative ways to evaluate your residents and fellows throughout their training. Let us take a look at the five types of questions you can use on your resident evaluations and the feedback each type of question provides to your CCC. Read the description of the question type, the grade scales, the distribution method available and the milestone mapping available for each.

You have the flexibility to mix and match these five types of questions on your resident evaluation forms. Choose the styles that meet your program's needs. The only exception is the on-demand daily Shift Cards. They only contain milestone narratives as questions.

FIVE TYPES OF QUESTIONS

1. QUESTION

- **Description**: This is a standard question you create in your own words, the kind of customized question you have been using all along.
- **Grade Scale**: This is your own grade scale in your own words. We recommend using a Likert scale, such as a range of 1 - 5 or 1 - 9.
- **Distribution Method**: Evaluations with standard questions can be distributed at the end of a rotation or can be made available to evaluators as an on-demand evaluation.
- **Milestone Mapping**: The evaluation results from these questions can be mapped to the subcompetencies providing evaluation feedback to your CCC within the resident's Milestone Review.

Sample Question and Grade Scale in your own words:

Patient Care

1 Demonstrates caring behavior toward patients and families

Poor 1	Below Average 2	Average 3	Above Average 4	Excellent 5	N/A
O	O	O	O	O	O

2. EPA

- **Description**: An EPA (Entrustable Professional Activity) is a question created in your own words that allows faculty members to rate their level of trust in the resident to perform an activity independently.
- **Grade Scale**: An EPA uses a special "Entrustment Scale" rather than a typical grade scale. We provide you with a default Entrustment Scale that can be edited. Please note: There is only one Entrustment Scale per department.
- **Distribution Method**: Evaluations with EPAs can be distributed at the end of a rotation or can be made available to evaluators as an on-demand evaluation.
- **Milestone Mapping**: Programs can map the responses from their EPAs to either subcompetencies or to individual milestones providing evaluation feedback to your CCC within the resident's Milestone Review.

Sample EPA Question and Entrustment Scale:

Transition of care

The resident is trusted to participate in this activity

Only as an observer		With direct supervision		With indirect supervision		Independently		As an instructor of junior colleagues	Did not observe
O	O	O	O	O	O	O	O	O	O

3. MILESTONE

- **Description**: Place the ACGME published milestone narratives on your evaluations.
- **Grade Scale**: The grade scale for milestone questions includes Yes, No and Not Observed.
- **Distribution Method**: Milestone questions can be placed on two different types of evaluation forms: The evaluation of a resident at the end of a Rotation and on daily Shift Cards.
  - **End of Rotation Evaluations** – These evaluations are distributed at the end of a rotation and include the milestone narratives manually selected by you.
  - **Shift Cards** – These daily shift evaluations only include milestone questions. The milestones are randomly selected by the software from a pool of pre-selected milestones. These evaluation forms are available "on-demand" to evaluators.
- **Milestone Mapping**: Results of any milestone questions are automatically mapped to the corresponding milestones on the resident's Milestone Review providing valuable evaluation feedback to your CCC. No milestone mapping is necessary on your part.

Sample Milestone Question:

> Consistently performs accurate and appropriately thorough physical exams
>
> Yes   No   Not Observed
> ○   ○   ○
>
> Comments
> [   ]

4. SUBCOMPETENCY

- **Description**: Evaluate your residents by placing the ACGME published subcompetencies directly on your evaluation forms. This can be done in two ways.
  - o **Manually-Added**: Place specific subcompetencies on your evaluation form. The resident is evaluated on that subcompetency regardless of the resident's rotation.
  - o **Rotation-Based**: Designate the subcompetencies that should appear on the resident's evaluation based on their rotation. Allow the system to dynamically place the correct subcompetencies on the questionnaire, as designated by you, for the resident's rotation.
- **Grade Scale**: The grade scale mimics the grade scale used on a milestone subcompetency for your subspecialty.
- **Distribution Method**: Evaluations with subcompetencies can be distributed at the end of a rotation or can be made available to evaluators as an on-demand evaluation.
- **Milestone Mapping**: Results from subcompetency questions will be automatically linked to the subcompetencies on the resident's Milestone Review providing evaluation feedback to your CCC.

Sample Subcompetency Question:

Gathers and synthesizes essential and accurate information to define each patient's clinical problem(s). (PC1)

Critical Deficiencies			Ready for unsupervised practice	Aspirational
Does not collect accurate historical data	Inconsistently able to acquire accurate historical information in an organized fashion	Consistently acquires accurate and relevant histories from patients	Acquires accurate histories from patients in an efficient, prioritized, and hypothesis-driven fashion	Obtains relevant historical subtleties, including sensitive information that informs the differential diagnosis
Does not use physical exam to confirm history	Does not perform an appropriately thorough physical exam or misses key physical exam findings	Seeks and obtains data from secondary sources when needed	Performs accurate physical exams that are targeted to the patient's complaints	Identifies subtle or unusual physical exam findings
Relies exclusively on documentation of others to generate own database or differential diagnosis	Does not seek or is overly reliant on secondary data	Consistently performs accurate and appropriately thorough physical exams	Synthesizes data to generate a prioritized differential diagnosis and problem list	Efficiently utilizes all sources of secondary data to inform differential diagnosis
Fails to recognize patient's central clinical problems	Inconsistently recognizes patients' central clinical problem or develops limited differential diagnoses	Uses collected data to define a patient's central clinical problem(s)	Effectively uses history and physical examination skills to minimize the need for further diagnostic testing	Role models and teaches the effective use of history and physical examination skills to minimize the need for further diagnostic testing
Fails to recognize potentially life threatening problems				
○	○	○	○	○	○	○	○	○

○ N/A

Comments
[   ]
Remaining Characters: 5,000

5. CUSTOM SUBCOMPETENCY

- **Description**: We provide an empty template that allows you to enter your own text for the subcompetency and milestones. Customize the headings of the five levels and adjust the grade scale to meet your program's needs. Use this type of question for your curricular milestones, to edit the published ACGME milestones or to create your own subcompetency-style questions.
- **Grade Scale**: Edit the grade scale to mimic the grade scale used on subcompetencies in your subspecialty.
- **Distribution Method**: Evaluations with Custom Subcompetencies can be distributed at the end of a rotation or can be made available to evaluators as an on-demand evaluation.
- **Milestone Mapping**: Your custom subcompetency questions can be mapped to the ACGME published subcompetencies to provide evaluation feedback to your CCC within the resident's Milestone Review.

Sample template to create your own Custom Subcompetency:

Title				
Level 1	Level 2	Level 3	Level 4	Level 5
+	+	+	+	+

Edit ▾ (1) (1.5) (2) (2.5) (3) (3.5) (4) (4.5) (5)

☑ Include N/A Option
Not applicable
☐ Require Response
☑ Include Comments

CREATE A QUESTIONNAIRE

You have the option to:

- Copy an existing questionnaire and make edits to it
- Create a new form

COPY AN EXISTING QUESTIONNAIRE

1. Go to *Evaluations > Questionnaires*
2. Click **Copy** in front of the questionnaire you want to copy
3. Make sure your Dept/Div is checked
4. Click **Copy**
5. Click **Edit** in front of the new copy. (It will have today's date on it.)
6. Click **Name/Title** to edit the name and title, and possibly delete the date.
7. Click **Save**
8. Proceed to section called *Add a Question*

CREATE A NEW FORM

1. Go to *Evaluations > Questionnaires*
2. Click **New**
3. Choose **Create a new Questionnaire**
4. Enter the name of the questionnaire. This is the name that appears in the questionnaire dropdown list when you create a session.
5. Enter the title of the questionnaire. This is the name displayed when the form is opened and on reports.
6. Click **Create Questionnaire**
7. Select your formatting options:

General Options

- General comments position – Choose if you want general comment box to appear at the top or bottom of the form, or none at all.
- Grade scale label position - Choose to have grade scale labels appear at each question, the first question under each category, or at the top of the questionnaire.
- Maximum number of parts per question – Choose how many parts (or sections) a question can have. Click **Preview** to view examples.
- Number of questions that can appear in a single row – Choose how many questions can be in a row. Click **Preview** to view examples.
- Display question numbers on the questionnaire – If the box is checked, the system will automatically number the questions for you. If you move a question from one position to another, the system will correct the numbering automatically.
- Display categories – Check to display the category names on the form.

Header Display Options – Select the items that should be displayed on your form:

- Form Title – The title of the form
- Statuses – The evaluator and subject status from the match
- Rotation Name – The rotation for evaluator and subject during the time period of the evaluation
- Employer – The employer for the evaluator and subject, if populated in Personnel
- Credentials – The credentials for the evaluator and subject, if populated in Personnel
- Program – The program for the evaluator and subject if populated in Personnel
- Use Preferred Names – Display the preferred name for the evaluator and subject, if populated in Personnel

Completion Options

- Release from "On Hold" after _____ evaluations have been completed – Determine how many evaluations need to be completed about a subject before the results are released to the subject.
- Edit high/low score notifications – Automatically email selected personnel when a subject receives a high or low score on an evaluation. Make selections and click **Save**.

8. Click **Set Formatting and Continue**

ADD A QUESTION

1. Click **Add**
2. From the drop-down list, select one of the following:
    a. Question
    b. EPA
    c. Milestone
    d. Subcompetency
    e. Custom Subcompetency
3. Make selection or add text, as necessary
4. Click **Save** or **Done**
5. Continue to add questions

OTHER OPTIONS

Add Instructions to the Form

1. Click **Instructions**
2. Enter instructions in text box
3. Click **Save**

Add Instructions to a Question

1. Click **Add** where you would like to add instructions
2. Click **Instruction**
3. Enter instructions in text box (5,000 characters max)
4. Click **Save**

Add Page Breaks to the Form

1. Click **Add** where you want to add a page break
2. Click **Page Break**
3. The page break will be inserted

EVALUATIONS – DISTRIBUTE

The term *Session* refers to the administrative settings and preferences that guide the distribution of an evaluation form. These settings include the subject of the evaluation, identifying evaluators, the evaluation time period, notification options, the questionnaires used, anonymity options, signatures, and the rules for how evaluation pairings are generated.

Elements of a session:
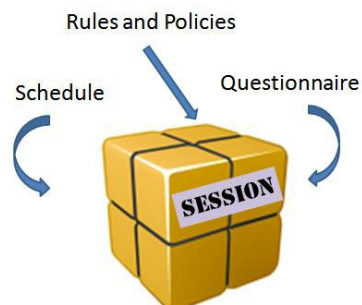
WHAT ARE INTERVALS?

Intervals are periods of time that subdivide the larger academic year. Evaluation sessions are composed of one or more intervals so that that rules and settings can be applied repeatedly over the course of the academic year.

WHAT IS AN EVALUATION MATCH?

Each pairing of an evaluator and a subject is called a match regardless of whether the subject of the evaluation is a person, a rotation, a program, event, or service. Matches are associated with specific sessions and may be generated automatically by the system according to the session settings or manually paired by the administrator.

FACULTY EVALUATION OF RESIDENT OR FELLOW

ADD SESSION

1. Go to *Evaluations > Add Session*
2. Type the name of the session in the New Session Name field – Faculty Evaluation of Resident (or Fellow)
3. Select the correct questionnaire
4. Choose evaluating People
5. Yes to email
6. Yes to evaluator signatures
7. Choose whether or not to display the help assistant while building the session
8. Click on **Create New Session**

PEOPLE TAB

1. Select the evaluator status types from the **Evaluator Status Type** dropdown list. For faculty, select Associate Program Director, Attending, and Program Director)
2. Select the subject status types from the **Subject Status Types** dropdown list (Chief, FEL, RES)

To include people from other departments:

1. Include evaluators from other departments:
    a. Click **Include evaluators from other departments**
    b. Select the other departments
    c. Click **Save**
2. Include outside subjects:
    a. Click **Include subjects from other departments**
    b. Select the other departments
    c. Click **Save**
    d. Click **Save Changes**

ROTATIONS TAB

1. Highlight the rotations from the **Choose Rotations** box to be included for matching in this session.
2. Move the selected rotations to the box on the right labeled **Active Rotations** by clicking the single arrow button pointing to the left or double clicking on the rotation name. To move all, use the double arrow button.

QUESTIONNAIRE TAB

1. Confirm the name of the **Questionnaire** to be used in this evaluation.
2. If additional signatures are required, please see the *Quick Start Guide* on *How to Add* Signatures to a Session.

SETTINGS TAB

Email Options

1. Select additional email options
2. Enter **how often** delinquent reminders should be sent
3. Delinquent emails can be sent in a recurring pattern. Enter how often they should be sent and a total number (limit) to be sent.
4. Contact Information is pre-populated

Anonymity

1. Select None for Anonymity

MATCH SCHEDULE TAB

1. Automatic matching is enabled by default.
2. Enter the number of days prior to the match that you would like to be notified that the session will match, then enter your email address in the text field.
3. In the "End of Session Settings" area, check the box for "Auto Copy when this session ends."
4. Check the box next to "Send an email reminder when the session ends" if you would like to receive a notification email when the session is copied. Enter your email address in the following field.
5. Auto Copy Settings – choose one of the following options:
   a. Use the interval dates in this session and increment the dates by one year – This selection retains the dates of the original session and advances them by one year.

   b. Create the interval dates according to this pattern – This selection allows you to set a specific Start Date and Interval pattern

6. Enter a session name (required).
7. Check the box for "Add dates to name" if you would like the session to automatically add start and end dates to the session. For example, "Faculty Evaluation of Resident" becomes "Faculty Evaluation of Resident 2017 – 2018."
8. Click **Save Changes** to save the Auto Copy settings.
9. Click **Add New Interval**
10. Choose how to create the interval schedule for matching
    a. Use the academic year intervals
    b. Or create your own intervals by entering a start and end date and the number of intervals to divide the date range into.
11. Click **Create Schedule**
12. The number in the Automatic Matching column is from the Match Interval field above
13. **Available**: the number of days before the end of the interval that the evaluation will be available for the evaluator to complete
14. **Due**: the date that the form is due. If the evaluation is not complete after this date, it will be considered delinquent
15. Make adjustments to the timeline if needed
16. Click **Continue**

You have now finished building your session for automatic matching. If all interval match dates are in the future, no further action is necessary because matching will occur as scheduled. However, you will have to initiate the matching process if any match dates have already passed. See the *Quick Start Guide for Matching Intervals*.

RESIDENT OR FELLOW EVALUATION OF FACULTY

ADD SESSION

1. Go to *Evaluations > Add Session*
2. Type the name of the session in the New Session Name field –Resident (or Fellow) Evaluation of Faculty
3. Select the correct questionnaire
4. Choose evaluating **People**
5. **Yes** to email
6. **No** to evaluator signatures
7. Choose whether or not to display the help session assistant while building the session
8. Click on **Create New Session**

PEOPLE TAB

1. Select the evaluator status types from the **Evaluator Status Type** dropdown list (Chief, FEL, RES)
2. Select the subject status types from the **Subject Status Types** dropdown list (Associate Program Director, Attending, Program Director)

ROTATIONS TAB

1. Highlight the **rotations from the Choose Rotations box** to be included for matching in this session.
2. Move the selected rotations to the box on the right labeled **Active Rotations** by clicking the single arrow button pointing to the left or double clicking on the rotation name.

QUESTIONNAIRE TAB

1. Select the name of the **Questionnaire** to be used in this evaluation.
2. If additional signatures are required, please see the *Quick Start Guide on How to Add Signatures to a Session*

SETTINGS TAB

Email Options

1. Choose the email options.
2. Enter **how often** delinquent reminders should be sent.
3. Delinquent emails can be sent in a recurring pattern. Enter how often they should be sent and a total number (limit) to be sent.
4. **Contact Information** is pre-populated.

Anonymity

1. Select the preferred type of anonymity. This is typically **Subject Anonymity.**
2. Choose whether or not to allow the subject access to see the completed form with evaluator identity hidden by checking the **Hide completed evaluations from the subject**.

MATCH SCHEDULE TAB

1. Automatic matching is enabled by default.
2. Enter the number of days prior to the match that you would like to be notified that the session will match, then enter your email address in the text field.
3. In the "End of Session Settings" area, check the box for "Auto Copy when this session ends."
4. Auto Copy Settings – choose one of the following options:
   a. Use the interval dates in this session and increment the dates by one year – This selection retains the dates of the original session and advances them by one year.

b. Create the interval dates according to this pattern – This selection allows you to set a specific Start Date and Interval pattern.

5. Enter a session name (required).
6. Check the box for "Add dates to name" if you would like the session to automatically add start and end dates to the session. For example, "Faculty Evaluation of Resident" becomes "Resident (or Fellow) Evaluation of Faculty 2017 – 2018."
7. Click **Save Changes** to save the Auto Copy settings.
8. Click **Add New Interval**
9. Choose how to create the interval schedule for matching
   a. Use the academic year intervals.
   b. Or create your own intervals by entering a start and end date and the number of intervals to divide the date range into.
10. Click **Create Schedule**
11. Make adjustments to the timeline if needed.
12. Click **Continue**

You have now finished building your session for automatic matching. If all interval match dates are in the future, no further action is necessary because matching will occur as scheduled. However, if any match dates have already passed, you must match them. See the *Quick Start Guide for Matching Intervals*.

RESIDENT EVALUATION OF ROTATION

ADD SESSION

1. Go to *Evaluations > Add Session*
2. Type the name of the session in the New Session Name field – Resident (or Fellow) Evaluation of Rotation.
3. Select the correct questionnaire.
4. Choose evaluating **Rotations.**
5. **Yes** to email.
6. **No** to evaluator signatures.
7. Choose whether or not to display the help assistant while building the session.
8. Click on **Create New Session.**

PEOPLE TAB

1. Select the evaluator status types from the **Evaluator Status Type** dropdown list (Chief, FEL, RES)

ROTATIONS TAB

1. Highlight the rotations from the **Choose Rotations** box to be included for matching this session.
2. Move the selected rotations to the box on the right labeled **Active Rotations** by clicking the single arrow key pointing to the left or double clicking on the rotation name.
3. Click **Save**.

QUESTIONNAIRE TAB

1. Confirm the name of the **Questionnaire** to be used in this evaluation.

SETTINGS TAB

Email Options

1. Choose email options
2. Enter **how often** delinquent reminders should be sent.
3. Delinquent emails can be sent in a recurring pattern. Enter how often they should be sent and a total number (limit) to be sent.
4. **Contact Information** should be pre-populated from your Personnel Data profile.

Anonymity

1. Select the type of anonymity preferred. This is typically **Subject Anonymity.**

MATCH SCHEDULE TAB

1. Automatic matching is enabled by default.
2. Enter the number of days prior to the match that you would like to be notified that the session will match, then enter your email address in the text field.
3. In the "End of Session Settings" area, check the box for "Auto Copy when this session ends."
4. Auto Copy Settings – choose one of the following options:
   a. Use the interval dates in this session and increment the dates by one year – This selection retains the dates of the original session and advances them by one year.

   b. Create the interval dates according to this pattern – This selection allows you to set a specific Start Date and Interval pattern.

5. Enter a session name (required).
6. Check the box for "Add dates to name" if you would like the session to automatically add start and end dates to the session. For example, "Resident (or Fellow) Evaluation of Rotation" becomes "Resident (or Fellow) Evaluation of Rotation 2017 – 2018."
7. Click **Save Changes** to save the Auto Copy settings.
8. Click **Add New Interval.**
9. Choose how to create the interval schedule for matching:
   a. Use the academic year intervals, or
   b. Create your own intervals by entering a start and end date and the number of intervals to divide the date range into.
10. Click **Create Schedule.**
11. The number in the Automatic Matching column is from the Match Interval field above.
12. **Available**: This is the date the evaluation will be available for the evaluator to complete.
13. **Due**: the date the evaluation is due. After this date, it will be considered delinquent.
14. Make adjustments to the timeline if needed.
15. Click **Continue.**

You have now finished building your session for automatic matching. If all interval match dates are in the future, no further action is necessary because matching will occur as scheduled. However, if any match dates have already passed, you must match them. See the *Quick Start Guide for Matching Intervals*.

MATCHING INTERVALS

Match intervals if the match date has already passed or if you want to check matches to confirm everything looks correct.

To match one Interval:

1. From the Match Schedule Tab within the evaluation session, click on the Interval you would like to match. A new window will pop up: Interval Matches.

2. Click Add Match in the upper right corner of the screen.
3. Matches will appear in the window.
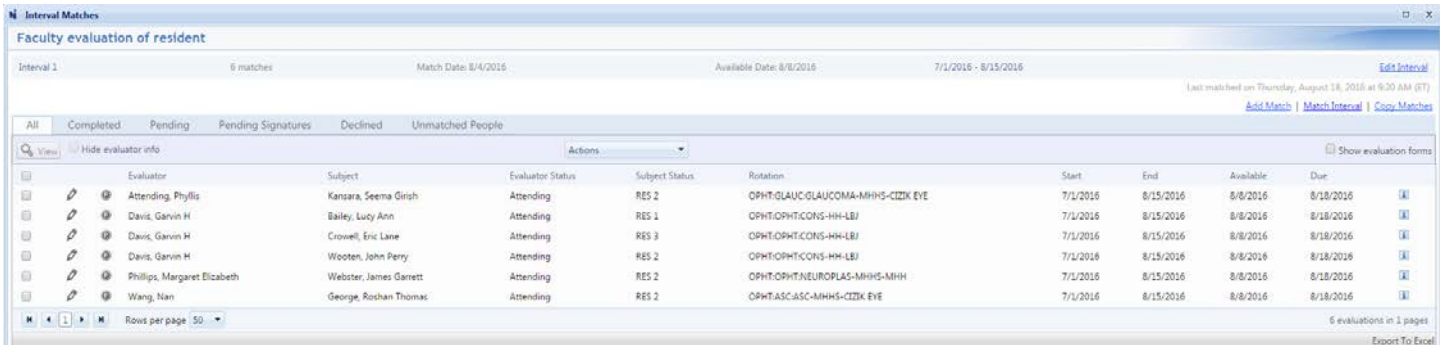
To match more than one Interval:

1. From the Match Schedule Tab within the evaluation session, check the box beside the Intervals you would like to match or check the box above all Intervals to select all.
2. Click on the More button
3. Click Match from the dropdown list.
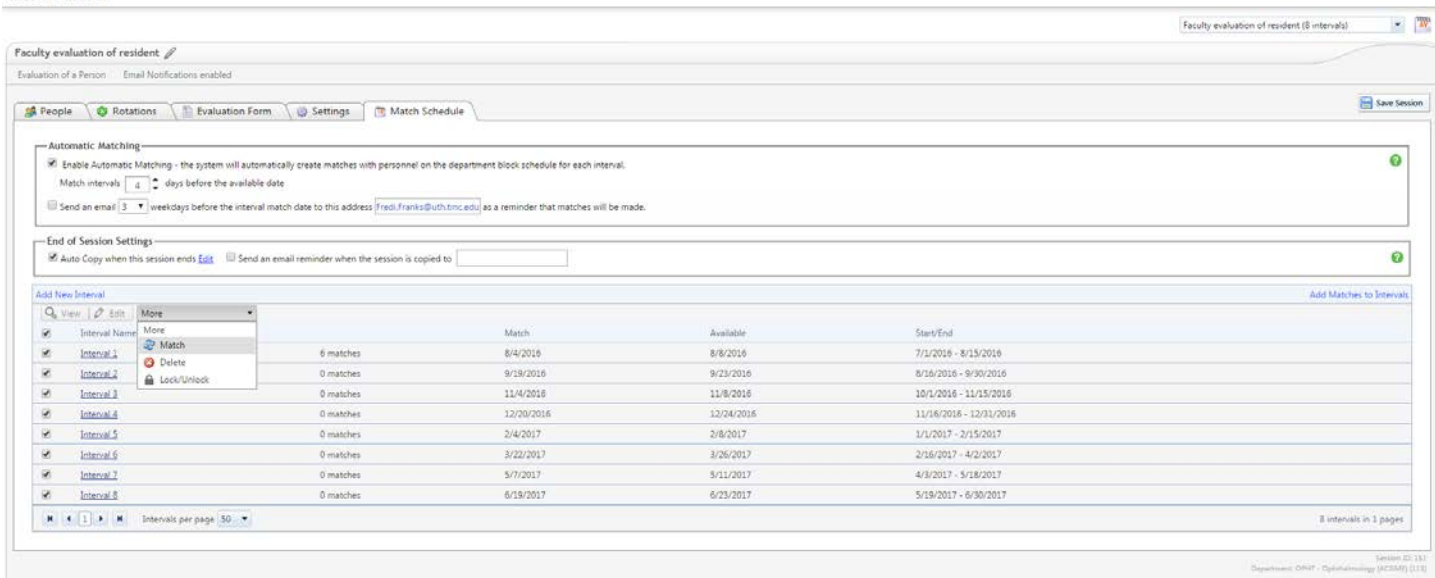
4. All selected Intervals will match. The number of matches made will appear to the right of each Interval name.

To review matches:

1. Click on an Interval Name.
2. In the Interval Matches window, select the **Unmatched People** tab. This view shows all unmatched people and why they are not matched.
3. Look for Subjects who are **Not On Schedule** or **No Match**.

Person	Department	Role	Deleted	Scheduled After Match	Not On Schedule	Wrong Status	Outside Department	No Match	
Aga, Irene EM	OBG - Obstetrics & Gynecology - LBJ (ACGME)	Evaluator			⊘				View Schedule
Alexander, Andrea Denise	OBG - Obstetrics & Gynecology - LBJ (ACGME)	Subject	⊘						View Schedule
Ankumah, Nana Ama Esi	OBG - Maternal-Fetal Medicine (ABOG)	Evaluator				⊘			View Schedule
Ashimi, Olaide Azizat	OBG - Maternal-Fetal Medicine (ABOG)	Evaluator				⊘			View Schedule
Astiazaran, Paulina	OBG - Obstetrics & Gynecology - LBJ (ACGME)	Subject	⊘						View Schedule
Bebbington, Michael W	OBG - Fetal Intervention (TMB)	Evaluator			⊘				View Schedule
Beeson, James H	OBG - Maternal-Fetal Medicine (ABOG)	Evaluator			⊘				View Schedule
Bradley, Taylor Rentz	OBG - Obstetrics & Gynecology - LBJ (ACGME)	Subject						⊘	View Schedule
Carreno, Carlos Alberto	OBG - Maternal-Fetal Medicine (ABOG)	Evaluator			⊘				View Schedule
Chang-Jackson, Shao-Chun R	OBG - Obstetrics & Gynecology - LBJ (ACGME)	Evaluator			⊘				View Schedule
Dinis Ballestas, Jenifer	OBG - Maternal-Fetal Medicine (ABOG)	Evaluator				⊘			View Schedule
Eziefule, Akwugo Adanna	OBG - Maternal-Fetal Medicine (ABOG)	Evaluator				⊘			View Schedule
Hardwicke, Robin L	IM - Internal Medicine (ACGME)	Evaluator					⊘		View Schedule
Hoffman, Mallory Michelle	OBG - Maternal-Fetal Medicine (ABOG)	Evaluator				⊘			View Schedule
Holcombe, Sara	OBG - Obstetrics & Gynecology - LBJ (ACGME)	Evaluator			⊘				View Schedule
Jalloul, Randa J	OBG - Obstetrics & Gynecology - LBJ (ACGME)	Evaluator			⊘				View Schedule
Johnson, Anthony	OBG - Fetal Intervention (TMB)	Evaluator			⊘				View Schedule
Joye, Kandace Ashley	OBG - Obstetrics & Gynecology - LBJ (ACGME)	Subject	⊘						View Schedule
Kim, Joy Y	OBG - Obstetrics & Gynecology - LBJ (ACGME)	Evaluator			⊘				View Schedule
Longo, Monica	OBG - Maternal-Fetal Medicine (ABOG)	Evaluator				⊘			View Schedule

Interval Matches — Faculty Evaluation of Resident

Interval 1 | 53 matches | Match Date: 7/20/2016 | Available Date: 7/24/2016 | 6/24/2016 - 7/31/2016 | Edit Interval

Last matched on Friday, August 12, 2016 at 4:49 PM (ET)

Add Match | Match Interval | Copy Matches

All | Delinquent | Completed | Pending Signatures | Declined | Unmatched People

Page 1 of 3 — Item 1 to 20 of 49 — Export To Excel

TROUBLESHOOTING MATCHES

After reviewing matches on the Unmatched People tab, check the following to determine why they are not matching:

Evaluator/Subject Status

Make sure all appropriate statuses are selected on the **People** tab:

1. For faculty: Associate Program Director, Attending, and Program Director
2. For residents/fellows: Chief, FEL1-4, RES1-7

Evaluators/Subjects from Other Departments

If there are faculty and/or residents/fellows in other programs who should be matching, make sure their programs are selected:

1. On the **People** tab, select **Include Evaluators from other departments** or **Include subjects from other departments**.
2. Select all departments needed.
3. Click **Save**.

Rotations

Verify that all possible rotations are included on the **Rotations** tab.

1. Click the Department dropdown arrow and select all programs that own any rotations your residents/fellows could be assigned. Rotations from those programs will appear in the **Available Rotations** box on the left.
2. Select the appropriate rotations (Control + click to select multiple rotations).
3. Move selected rotations to the **Active Rotations** box on the right by clicking on the single arrow pointing to the right.
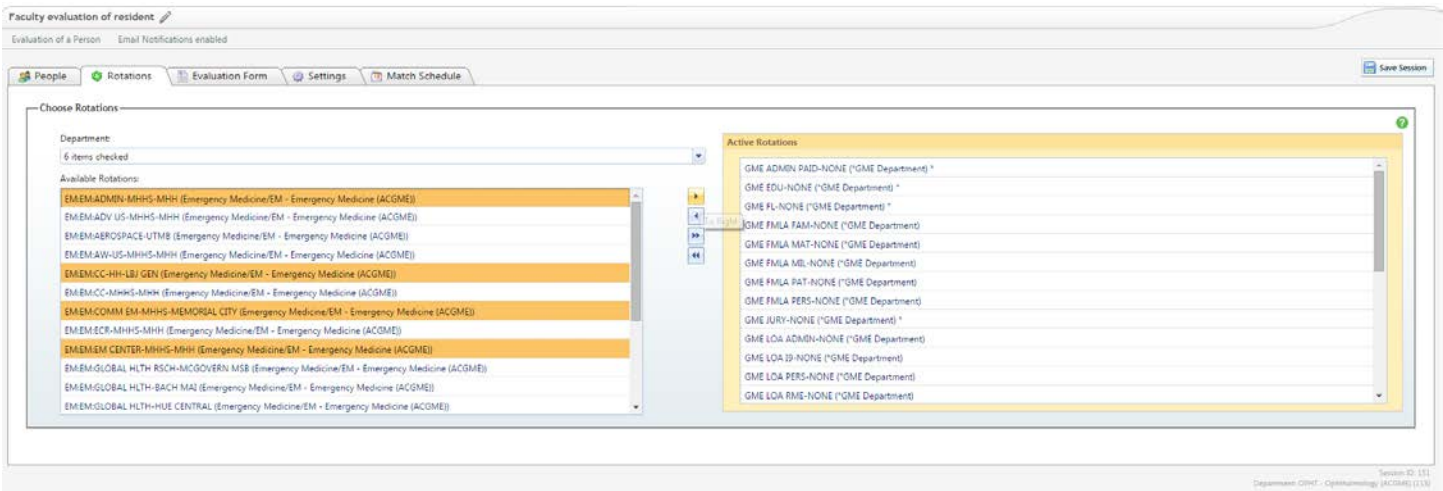
4. To move all Available Rotations to the Active Rotations box, click the double arrow pointing to the right.
5. Click **Save Session**.
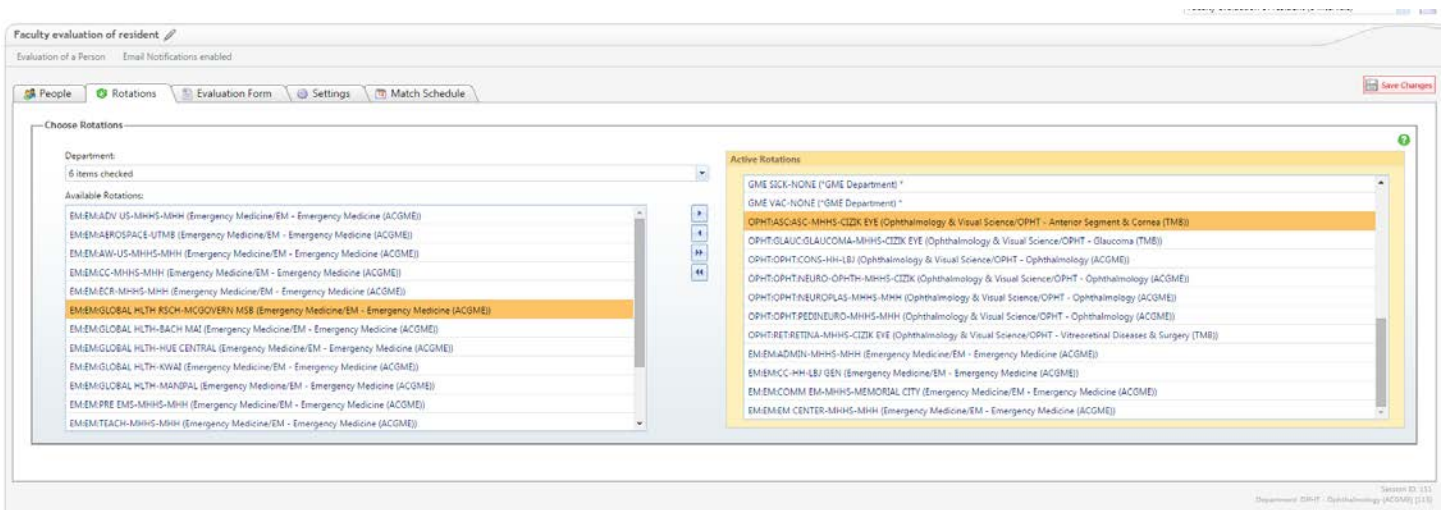
Schedules

1. If the rotations are listed in **Active Rotations**, go to *Schedules > View Schedule* to confirm that a faculty member is assigned to that rotation. If no faculty is scheduled on that rotation, go to *Schedules > Schedule Rotations* and add them.
2. If the faculty scheduled on the rotation(s) is from another program, go to the *People* tab and confirm their program is selected by clicking on **Include Evaluators from other departments**.

Rotation Dates

1. Confirm that the start date of resident/fellow AND faculty rotations coincide. For example, if a faculty is scheduled on a rotation from 7/1/2016-7/31/2016 and the resident is scheduled on the same rotation from 6/24/2016-7/31/2016, the match would not be created.
2. Go to the faculty schedule and edit the start date to 6/24/2016.

QUESTIONNAIRE

Build a questionnaire to use in the evaluation of a program. Existing program questionnaires in the standard format can be converted into the program questionnaire format as well.

CONVERT A STANDARD QUESTIONNAIRE TO A PROGRAM QUESTIONNAIRE

1. Go to *Evaluations > Questionnaires*
2. Click **Copy** next to the questionnaire
3. Make sure your department is selected
4. Scroll to the bottom of the page and click **Convert to Program Evaluation Form**
5. Read the popup and click **OK**
6. Click **Copy**
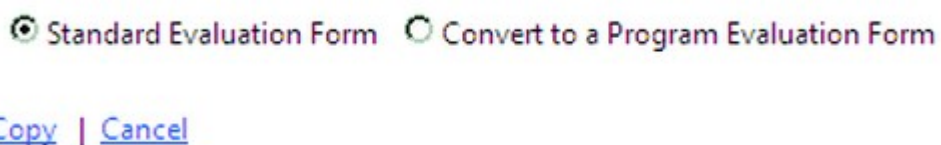
Your questionnaire is now copied into the Program Questionnaire list and can now be edited or used within a Program Evaluation session. It can be found at *Evaluations > Program Evaluations > Questionnaires*.

CREATE A NEW PROGRAM QUESTIONNAIRE

Go to *Evaluations > Program Evaluations > Questionnaires*

1. Click **New**
2. Enter the name of the form by clicking on the text "Enter Questionnaire name here"
3. Enter instructions by clicking on the text "Enter Questionnaire instructions here"
4. Click **Save Header Changes**
5. Click **OK**
6. Click **Add Question**

Category options – Choose one:

1. None
2. Existing Category – Select a category from the drop-down list
3. New Category – Type in a new category

Questions

1. Enter your question text in the box

Grade scale options – Choose one:

2. None
3. Existing Grade Scale – Select an existing grade scale. Mark if it is required.
4. New Grade Scale
    a. Check box to make a response to the grade scale required
    b. Enter name
    c. Select how many options
    d. Enter labels and values

Additional Options

1. Include Comment box
    a. Comment size
        i. Single line
        ii. Multiple lines
    b. Requirement Settings
        i. Not required
        ii. Always required
        iii. Required by response. When using this option, checkboxes appear for each label of the grade scale selected above. Check the responses that require a comment.
2. Include Not Applicable option – may type in value such as N/A
3. Click **Save**
4. Continue to add questions to form
5. Questionnaires can be previewed at any time during construction by using the *Preview* button at the top right of the screen

ADD SESSION

1. Go to *Evaluations > Add Session*
2. Type the name of the session in the New Session Name field –Resident Evaluation of Program.
3. Select **Programs.**
4. Select the correct questionnaire from the dropdown list.
5. **Yes** to email.
6. Choose whether or not to display the help assistant while building the session.
7. Click on **Create New Session**.

PEOPLE TAB

1. Select the evaluator status types from the **Evaluator Status Type** dropdown list.
2. Click **Add.**

PROGRAM TAB

1. Highlight the program name from the **Available Program** box to be included for this session.
2. Move the selected programs to the box on the right labeled **Active Programs** by clicking the single arrow key pointing to the left or double clicking on the rotation name.

QUESTIONNAIRE TAB

1. Confirm the name of the **Questionnaire** to be used in this evaluation.
2. Different questionnaires can be assigned to different status types by clicking **Add Questionnaire:**
   a. Choose the questionnaire from the first dropdown list.
   b. Choose the status that should get the questionnaire from the second dropdown list.
   c. Click **Save Questionnaire.**
   d. Any statuses picked in the People tab that do not have a questionnaire specifically assigned will get the default questionnaire.

SETTINGS TAB

Email Options

1. Choose email options.
2. Enter how often delinquent reminders should be sent.
3. Delinquent emails can be sent in a recurring pattern. Enter how often they should be sent and a total number (limit) to be sent.
4. Contact Information should be populated from your Personnel Data profile.
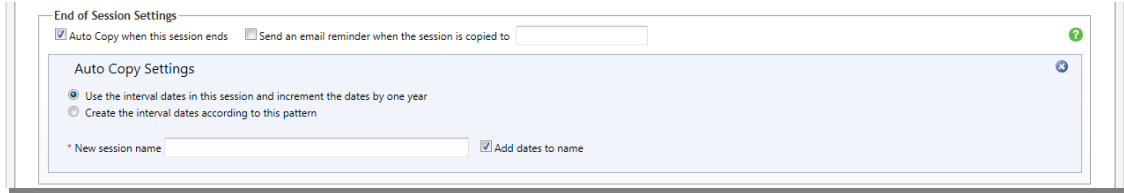
MATCH SCHEDULE TAB

Automatic Matching
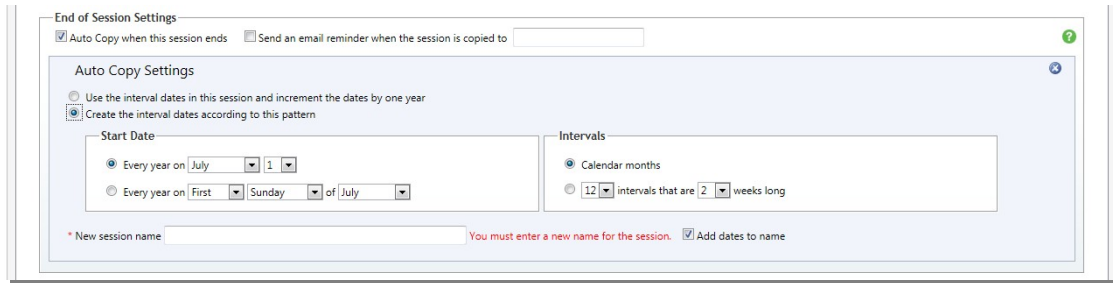
1. By default, the session will automatically make your matches for you. Uncheck the box if you do not want automatic matching.
2. Select when you want the matches made.
3. Check the box if you want an email sent to you that the matches will be available to the evaluators.

End of Session Settings

1. Check the box for **Auto Copy when this session ends.**
2. Auto Copy Settings – choose one of the following options:
   a. Use the interval dates in this session and increment the dates by one year – This selection retains the dates of the original session and advances them by one year.
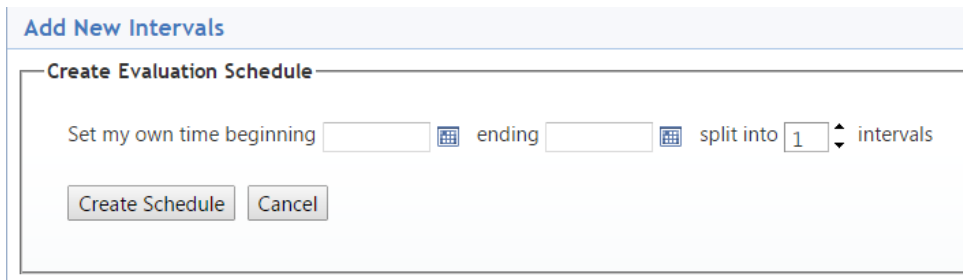
   b. Create the interval dates according to this pattern – This selection allows you to set a specific Start Date and Interval pattern.

3. Enter a session name (required).
4. Check the box for **Add dates to name** if you would like the session to automatically add start and end dates to the session. For example, "Resident Evaluation of Program" becomes "Resident Evaluation of Program 2017 – 2018."
5. Click **Save Changes** to save the Auto Copy settings.

Add Intervals

1. Click **Add New Interval.**
2. Enter a start and end date and the number of intervals to divide the date range into.
3. Click **Create Schedule.**

4. Make adjustments to the dates on the timeline, if needed
5. Click **Continue**

Matches will be made for each resident and to the program assigned to them in their Personnel file. Matches are created on the scheduled available date for all statuses selected in the session.

When faculty members are the evaluators, the matches are made by identifying the department associated with the program selected in the session and then matching all faculty in those departments with the program.

PROGRAM EVALUATION REPORTS

Once program evaluations have been distributed and completed, you can generate several reports:

- Results Report – Summarizes the feedback on program evaluations on a single program or multiple programs; flag problem areas
- Problem Resolution Report – Tracks issues within a program for questions that have been flagged
- Program Progress Report – Monitors compliance for completion of program evaluation

RESULTS REPORT

By Single Program

1. Go to *Evaluations > Program Evaluations > Results*
2. Set a date range
3. Select **Single Program**
4. Choose a Program
5. Select a Questionnaire – The questionnaire list contains the forms used to evaluate the program in that date range
6. Select Statuses – The status list displays the statuses of people who have completed evaluations in that date range using that form
7. Check the box to show the average score
8. Click **View Report**

The report displays the question, the actual answers from the grade scale, a graphical representation of the amount of people who answered the question, a percentage for those answers, and also a count of the number of people who responded with that answer. You can also Flag certain questions as problems.
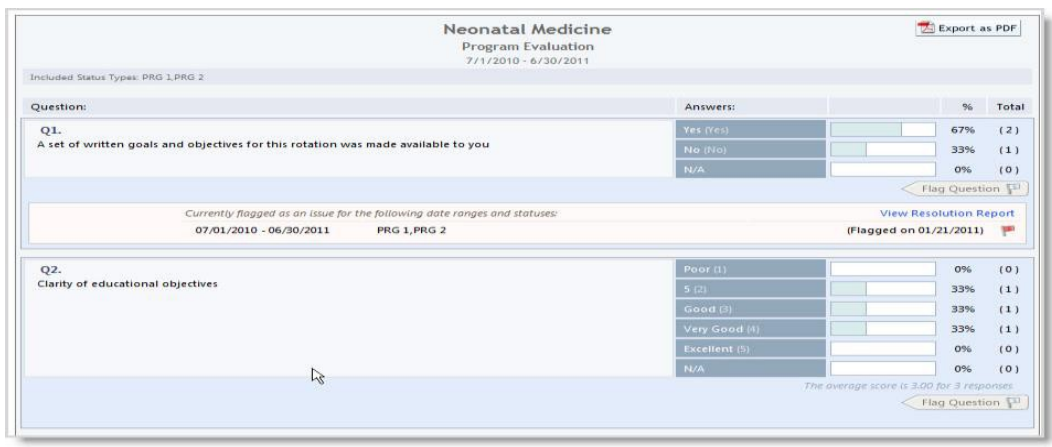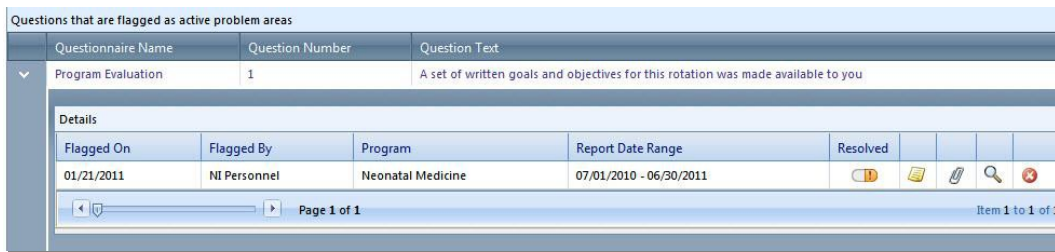
By Multiple Programs

1. Go to *Evaluations > Program Evaluation > Results*
2. Set a date range
3. Select **Multiple Programs**
4. Select a Questionnaire – The questionnaire list contains the forms used to evaluate multiple programs in that date range
5. The status list will update to display the statuses of people who have completed evaluations in that date range using that form.
6. Check the box to show the average score
7. Click **View Report**

PROBLEM RESOLUTION REPORT

The Problem Resolution Report is where you can manage questions which have been flagged as problems from the Evaluation Results report. Add notes or attached files to the questions you have flagged as a problem. Mark questions you have flagged as a problem as resolved.

1. Go to *Evaluations > Problem Resolution*
2. Take action on an issue:
   a. Mark as resolved
   b. Enter a comment
   c. Attach a file
   d. View the Responses
   e. Delete the problem

PROGRAM PROGRESS REPORT

Identify people who have not completed their pending program evaluations. Send email reminders to individuals or the entire list of personnel regarding their delinquent evaluations.

1. Go to *Evaluations > Progress*
2. Select the academic year
3. Select the program
4. Select statuses to include in the report
5. Click **Apply Filters**

	Name	Completed	Total	Delinquent	
				Contact All Delinquent Evaluators	
	Neonatal Medicine			View unmatched people	
	PRG 1				
	Marchesa, Ralia	1 ☑	1		
	Radcliff, Ava	1 ☑	1		
	PRG 2				
	Ogabana, Eli	1 ☑	1		
	PRG 3				
	Yu, Melanie Sho	0 ⚠	1	1	✉
					Export To Excel

Send emails to individuals by clicking the email icon. Send an email to all delinquent evaluators by clicking **Contact All Delinquent Evaluators**.

EVALUATIONS – MANAGE

The Session Manager is a centralized place to manage all evaluations. Evaluations can be filtered by academic year and interval.

There are five primary tabs to view evaluations. Each primary tab groups evaluation data by elements within the session. The Sessions tab contains all session data. The rest of the primary tabs display information by a specific element in the session, information by Evaluator, by Subject, by Rotation and by Date.

```
                    Primary Tabs

   Sessions   By        By        By        By Date
              Evaluator Subject   Rotation
```
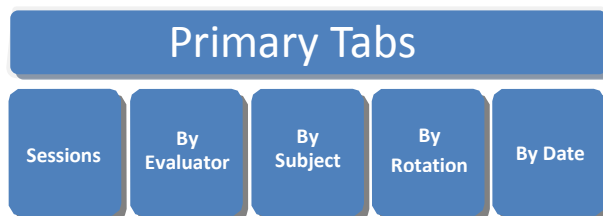
On the Sessions tab, click the **>** icon to the left of the session name to view the intervals.

Some of the other primary tabs contain a group of secondary tabs to further refine your search. On the By Evaluator, By Subject, and By Rotation tabs, click the **>** icon to the left to view more details. The secondary tabs contain data about individual matches, so you can view All, Completed, Delinquent or Pending evaluations on that person.

```
                Secondary Tabs

   All    Completed   Delinquent   Pending
```
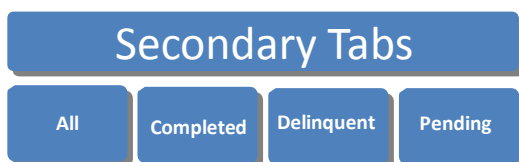
Within each secondary tab are links to actions that can be taken, such as viewing the completed evaluation, releasing an evaluation from hold, editing, deleting and more.

SESSION MANAGER

1. Go to *Evaluations > Session Manager*

The initial Session Manager page displays sessions by Academic Year or "All" academic years can be displayed. These can further be filtered by an interval which will display all sessions where start and stop dates cross the selected interval date range.

Icons

Each icon performs an action on the Manage Sessions start page:

| Copy | Unlocked | Not Archived | Archived | Locked |

Mouse over the icons to see a description.

SESSIONS TAB

Click the **>** icon to the left of the session to view intervals
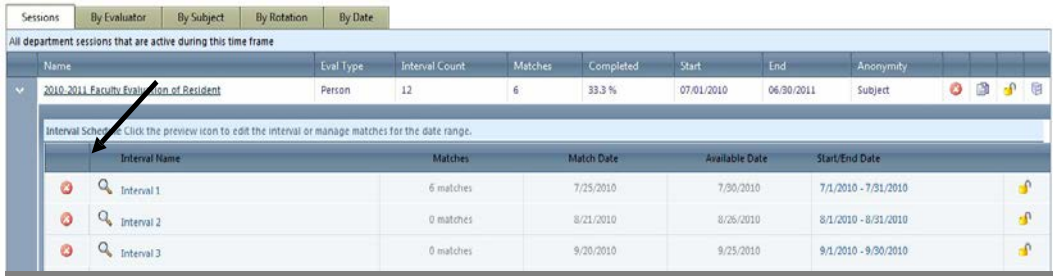
Click the magnifying glass icon to reveal the match details for the interval. Secondary tabs contain match details grouped by the indicated element: delinquent matches, completed matches, pending signatures and matches returned as NET.

Each tab contains links to actions associated with the description of the tab. For instance, you can send a reminder to a person with delinquent evaluations from the delinquent tab or return an evaluation to the evaluator on the NET tab. Put a check in the box next to the person's name to activate the *Actions* dropdown list.
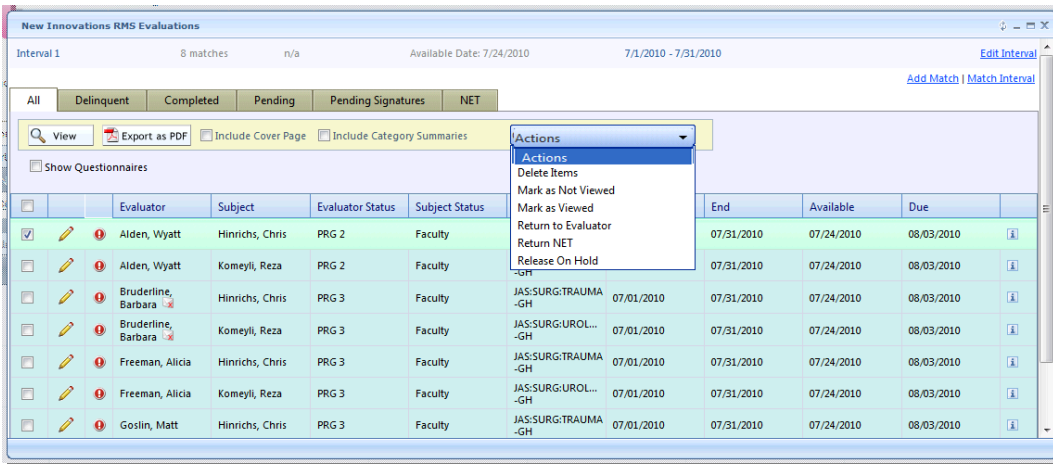
BY EVALUATOR TAB
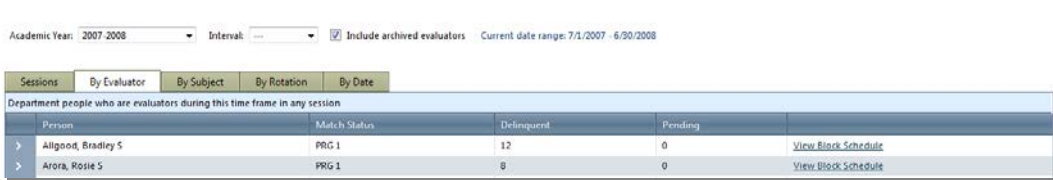
Lists evaluators alphabetically for the academic year or interval selected. Names are separated into two grids; your department's people and those from outside department. Each person's schedule can be viewed for the academic year selected. Pages can be advanced by using the scrolling arrows or select a letter to group evaluators by the first letter of their last name.
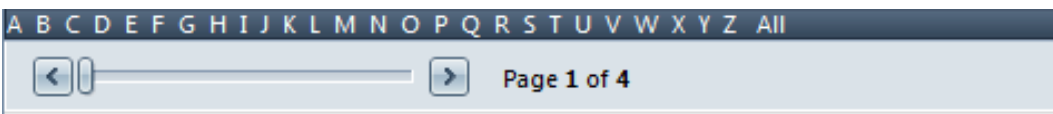
Click the arrow to the left of a person's name to see all evaluations for the academic year from most current to oldest. They can be filtered by Completed, Delinquent and Pending. Click any column header to sort.

Completed evaluations that have not yet been viewed by an administrator are in bold font. Pending Match details can be edited by clicking the pencil icon.

BY SUBJECT TAB

Functions are identical to the "By Evaluator" tab except the list is populated alphabetically by subjects. Functions are identical to other grids as evaluations can be viewed, exported to PDF, deleted, marked as viewed or not viewed by an administrator. Block schedules can also be viewed for the selected person and date range.

BY ROTATION TAB

Functions are the same as the "By Evaluator" tab except all rotations owned by your department and other departments are contained in a single grid. Functions are identical to other grids as evaluations can be viewed, exported to PDF, deleted, marked as viewed or not viewed by an administrator. Click the arrow to the left of a rotation name to see all evaluations found for the academic year selected listed from most current to oldest.

BY DATE TAB

Evaluations for date ranges that cross the selected interval will be displayed alphabetically by evaluator name. Functions are identical to other grids as evaluations can be viewed, exported to PDF, deleted, marked as viewed or not viewed by an administrator.

VIEW HIGH/LOW SCORES

If you have configured your questionnaire to alert people when a high or low score has been given by an evaluator, you can track that information on this page.

1. Go to *Evaluations > View Evaluations > High/Low Scores* tab
2. Select the academic year, sessions, evaluators and/or subjects
3. Select **View List**
4. Click **View Selected Evaluations** to see the completed form.
5. The high/low scores which have been flagged are displayed in red on the page.

EVALUATION TOOLS

Complete Evaluations for Others

It may be possible that some evaluators would not log in to New Innovations. If this is the case, you can these people printed copies of the evaluation. When they complete paper forms and return them to you, you can enter the results on their behalf, provided they have Personnel Data records. Here are the steps:

1. Go to *Evaluations > Complete for Others*
2. Select the academic year, sessions, evaluators and/or subjects
3. Select **View List**
4. Select **Evaluate** to complete the evaluation for someone else.

View List	Submit Selected Evaluations as NET
All	None	Inve...

	Evaluator Name	Rotation/Subject Name	Rotation	Session Name	Start Date	Stop Date	Session Due Date
Evaluate	Abrams, Justin	Coates, Jeremy	PED:ADOL (Pediatrics)	NBME - APB evaluation of Faculty (Pediatrics)	7/1/2009	7/31/2009	8/7/2009
Evaluate	Abrams, Justin	Coates, Jeremy	PED:ADOL (Pediatrics)	Resident Evaluation of Faculty (Pediatrics)	7/1/2009	7/31/2009	8/7/2009
Evaluate	Abrams, Justin	Abrams, Justin	PED:ADOL (Pediatrics)	NBME - APB Self Evaluation (Pediatrics)	7/1/2009	7/31/2009	8/7/2009
Evaluate	Abrams, Justin	Walters, James	PED:ADOL (Pediatrics)	NBME - APB evaluation of Faculty (Pediatrics)	7/1/2009	7/31/2009	8/7/2009

SET UP AUTO-LOGIN

The Auto-Login feature provides evaluators with a link in their notification email that will take them directly to the Complete Evaluations tool, bypassing the login process. Follow these steps to set it up:

1. Go to *Evaluations > Auto-Login*
2. Check those work roles who will use Auto-Login
3. Click **Save** when all choices have been made

EVALUATION REPORTS

The Evaluation Reports display evaluation information collected on your faculty, rotations, residents and fellows, including the new milestone results.

1. Go to *Evaluations > Reports*

The old evaluation reports are still available for a short time. Click **Go to Legacy reports** to view the old evaluation reports. Click **Exit legacy reports** to return to the current version.

GME LEVEL REPORTS

Select a principal sponsor for a global view of the evaluation information for the programs linked to that principal sponsor. In the Sponsor drop-down list, select **Others** to view all programs not linked to a principal sponsor.

For each program, the following information is displayed for the date range selected. The date range defaults to the current academic year.

- Resident count – Total number of residents in the program
- Unmatched residents – The total number of residents who have not been included as a Subject in an evaluation match
- Distributed – Total number of evaluations distributed within the program
- Completed/Overall Compliance – Total "number" of evaluations completed and the "percentage" of evaluations completed of those distributed within the program (All Evaluators)
- Faculty Compliance – Percentage of completed evaluations where the evaluator had a Work Role of Faculty (Faculty Only)
- On Time – The number of evaluation completed on time (All Evaluators)
- Late – The number of evaluations completed past the due date (All Evaluators)
- NET – Number of evaluation returned as NET – Not Enough Time (All Evaluators)
- Incomplete – Total number and percentage of evaluations that are incomplete (All Evaluators)
- Overdue – Total number of evaluations that are past the due date. For example, if the Due Date for an evaluation was yesterday or earlier and the End Date of the match falls within the date range of the report and the evaluation has not been completed, it will be included in this count. (All Evaluators)

Click on a Program to view the data for that program.

Evaluation Reporting

St. Christopher Medical Center ▾

Evaluations of Residents:

📅 07/01/2014 - 06/30/2015 ▾   ⬇ Export

Program	Resident Count	Unmatched Residents	Distributed	Completed / Overall Compliance	Faculty Compliance	On Time	Late	NET	Incomplete	Overdue
Anesthesiology	0	0	0	0 (0%)	0%	0	0	0	0 (0%)	0
Cardiovascular Disease	1	1	0	0 (0%)	0%	0	0	0	0 (0%)	0
Emergency Medicine	28	3	514	15 (2.92%)	2.96%	3	12	0	499 (97.08%)	491
Endocrinology	5	5	0	0 (0%)	0%	0	0	0	0 (0%)	0
Family Medicine	9	0	149	62 (41.61%)	60%	12	50	0	87 (58.39%)	87

RESIDENTS TAB

PROGRAM REPORTS

On the Residents tab, there are four overall reports that display the evaluation data about the residents in your program. The four reports are Performance, Competency, Compliance and Subcompetency. The default time frame is for the current academic year.

PERFORMANCE REPORT

The program-level Performance Report provides an overview of the performance data collected on all residents. By default, this screen only displays evaluation data that originated from your department.

1. Go to *Evaluations > Reports*
2. By default, you will be on the *Residents* tab
3. By default, you will be on the *Performance Report*

This report displays:

- Name – The residents' names are shown, grouped by Year in Residency. Uncheck the box for Group by Year to view all residents in alphabetical order.
- Evaluated – The number of completed evaluations about the resident is shown, and in parenthesis, the number of evaluations distributed with the resident as the subject that have not been completed
- Low Scores – The number of low scores that the resident has received

COMPETENCY REPORT

The program-level Competency Report displays data collected about the resident from custom questions only. These are the standard questions in your own words, where Categories are linked to Core Competencies. The results are grouped by Core Competency. These results do not include Custom Subcompetencies, EPAs, Milestones, nor Subcompetencies.

Generate the Competency Report:

1. Go to *Evaluations > Reports > Residents* tab
2. Select **Competency** from the dropdown list

This report displays the following information:

- Name – The resident's name is shown, grouped by Year in Residency. Uncheck the box for Group by Year to view all residents in alphabetical order.
- Core Competencies - The resident's level of competency is shown as a percentage for each Core Competency (Patient Care, Medical Knowledge, etc.)
  - Calculations – All results are converted to percentages and then averaged.
  - Example – On two Patient Care questions, a resident receives a 3 on a scale of 1-5 and a 7 on a scale of 1-9. The 3 is converted to 60% and the 7 is converted to 77.78%. These are then averaged ((60 + 77.78)/2) for a score of 68.89% in Patient Care.
- Overall – This score is an average of all scores the resident received
  - Calculations – Responses to all questions are converted to a percentage, then averaged. (It is NOT an average of the averages.)
  - Example – A resident receives a total of 50 responses. These responses are each converted to a percentage, added together and divided by 50 to get the Overall average.

COMPLIANCE REPORT

The program-level Compliance Report displays information about evaluations that were assigned to a resident and are past their Due Date. For the data to be included on this report:

- The End Date of the match must fall within the date range of the report
- The Due Date is in the past

Generate the Compliance Report:

1. Go to *Evaluations > Reports*
2. Click the **Residents** tab
3. Select **Compliance** from the dropdown list

This report displays the following columns:

- Name – The resident's name is shown, grouped by Year in Residency. Uncheck the box for Group by Year to view all residents in alphabetical order.
- Total Due – The total number of evaluations assigned to the resident for the date range of the report
- Compliance – The total percentage of completed evaluations is shown
    - Calculations – The number of evaluations completed divided by the total number of assigned evaluations
    - Example – A resident has 50 evaluations assigned to her with Due Dates in the past. She completed 36 on time and 4 of them past the Due Date. Forty completed evaluations divided by 50 assigned equals 80%. Her Compliance column would display 40/50 (80%).
- Completed on Time – The number and percentage of evaluations completed on time (by 11:59 PM on the Due Date)
    - Calculations – The number of evaluations completed on time divided by the total number of assigned evaluations
    - Example – A resident has 50 evaluations assigned with Due Dates in the past. She completed 36 on time and 4 of them past the Due Date. Her "Completed on Time" column would display 36 (72%).

- Completed Late – The number and percentage of evaluations completed late (after 11:59 PM of the Due Date)
  - o Calculations – The number of evaluations that were completed late divided by the total number of assigned evaluations
  - o Example – A resident has 50 evaluations assigned to her with Due Dates in the past. She completed 36 on time and 4 of them late (past the Due Date). Four evaluations completed late divided by 50 assigned equals 8%. Her "Completed Late" column would display 4 (8%).
- NET – The number and percentage of evaluations returned as NET (Not Enough Time)
  - o Calculations – The number of evaluations that were returned as NET divided by the total number of assigned evaluations
- Example – A resident has 30 evaluations assigned to her with Due Dates in the past. She returned 5 of them as NET. Five divided by 30 equals 16.67%. Her "NET" column would display 5 (16.67%).
- Delinquent – The number of evaluations assigned to the resident that have not been completed and are past the Due Date.

SUBCOMPETENCY REPORT

The program-level Subcompetency Report displays the results of evaluations completed on the residents where the questionnaire contained any of the following:

- Actual ACGME subcompetencies inserted on the questionnaire, either manually or rotation-based
- Responses mapped to subcompetencies, such as from EPAs, custom subcompetencies and custom questions (in your own words)

Generate the Subcompetency Report:

1. Go to *Evaluations > Reports*
2. Click the **Residents** tab
3. Select **Subcompetency** from the dropdown list

This report displays the following columns:

- Name – The resident's name is shown, grouped by Year in Residency. Uncheck the box for **Group by Year** to view all residents in alphabetical order.
- Competencies – Each Core Competency has its own column. Within each column the subcompetencies for each core competency are displayed with the average score that the resident received on that subcompetency from evaluation feedback.
  - o Calculations – Subcompetencies, EPAs and Custom Subcompetencies all have a 1-5 grade scale. However, custom questions (in your own words) may have different grade scales. In order to include all scores in the Subcompetency average, we "normalize" the results from custom question to a 1-5 grade scale. The following formula is used to normalize grade scales on custom questions that are other than 1-5. All the scores are then averaged.

$$m + \frac{(p-1)(M-m)}{n-1}$$

Where: m = Minimum Milestone Value (0 or 1)
M = Maximum Milestone Value (4 or 5)
p = Likert position (selection chosen by evaluator)
n = Number of choices on the grade scale

- Example - A resident received the following scores on her evaluations:
  - 3.5 – Actual PC1 subcompetency (1-5 scale)
  - 3.0 – EPA mapped to PC1 (1-5 scale)
  - 3.5 – Custom Subcompetency mapped to PC1 (1-5 scale)
  - 6.0 – Custom Question mapped to PC1 (1-9 scale). The score of 6 is normalized, using the formula above, to a score of 3.5.
- These four scores (3.5, 3.0, 3.5, 3.5) are then averaged for a score of 3.38.

Note:

Some specialties have an extra column for "Has Not Achieved Level One" or something similar. Any evaluator responses from this column will be counted as "zero" and included in the average scores.

INDIVIDUAL RESIDENT REPORTS

There are six Performance Reports that provide detailed evaluation information collected on a specific resident. Click on a resident's name in any of the Program reports to view more details.

The resident's name and photo will appear at the top left of the report, along with the total number of times this resident has been evaluated. Click Rotation Data to view the list of rotations the resident served on during the time span of the report. By default, results are displayed for the current academic year. The End Date of the evaluation match must fall within the report's date range to be included.

SUMMARY REPORT

The Summary Report shows the results from every question on every questionnaire that was used to evaluate the resident/fellow. Comments are displayed by default.

Generate the Summary Report:

1. Go to *Evaluations > Reports*
2. Select a Resident
3. Click the **Summary** tab

The columns on the Summary Report include:

- Questionnaire
  - o Name and Title of the questionnaire
  - o Label – Describes what type of question it is: EPA, Milestone, Subcompetency, Custom Question (in your own words), Custom Subcompetency
  - o Question – Shows the actual question text from the questionnaire
  - o Comments
- Average – Displays the average score the resident received on each question
- Peer Average – Shows the average score of the resident's Peer Group within their program. Click on the Peer Average to view the people who compose the Peer Group. The Peer Group consists of those residents who have the same Year in Training for the date range of the report.
- Minimum – Displays the lowest score given to the resident
- Maximum – Displays the highest score given to the resident
- Standard Deviation – Displays the variation or dispersion of the results from the average score.

Notes:

- Check the box for **Scoring Details** to view a graphic display of the results. The number of responses given is shown under each level of the grade scale.
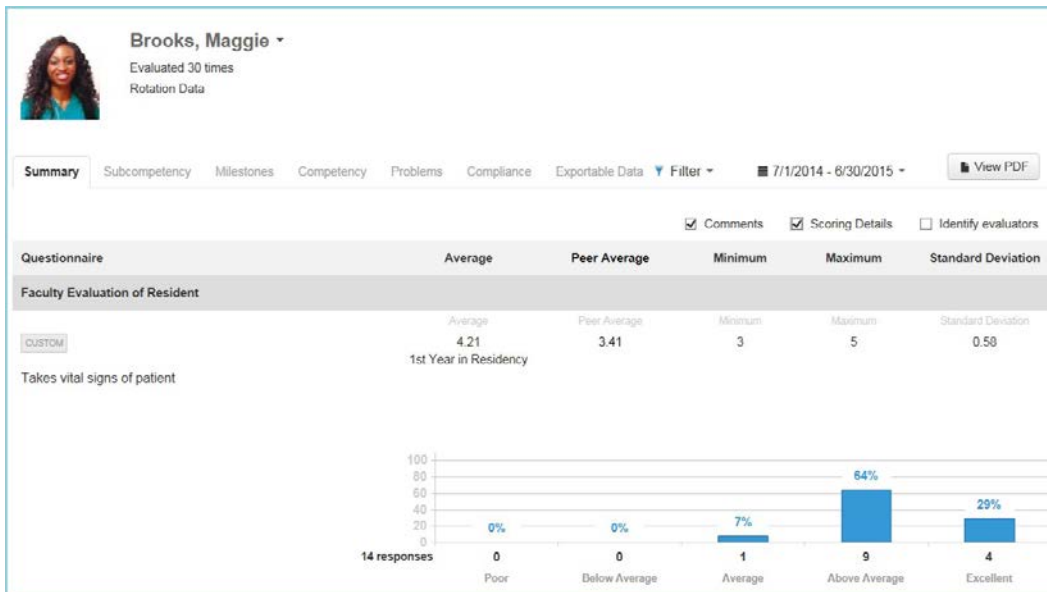
The Scoring Details for Yes/No questions differ from the multiple-choice grade scale. In the example below, the resident received nine Yes responses out of ten total responses on this Milestone question.
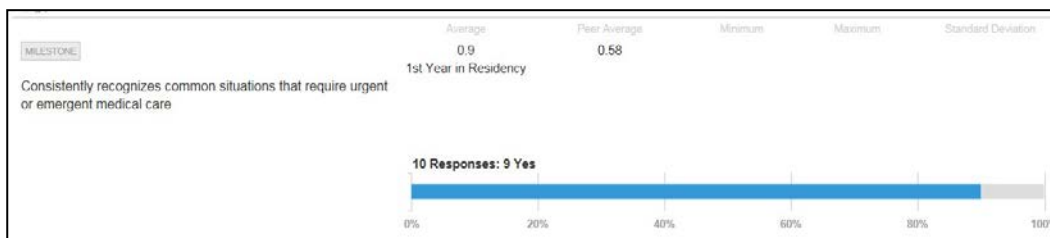
SUBCOMPETENCY REPORT

The Subcompetency Report displays the results of evaluations completed on the residents where the questionnaires contained the following:

- Actual subcompetencies
- Responses mapped to subcompetencies, such as EPAs, custom subcompetencies and custom questions (in your own words)

Generate the Subcompetency Report:

1. Go to *Evaluations > Reports*
2. Select a Resident
3. Click the **Subcompetency** tab

This report displays the following columns:

Training Year – The resident's scores are shown, grouped by Year in Residency

Competencies – Each Core Competency has its own column. Within each column the subcompetencies are displayed with the average score that the resident received on that subcompetency.

Calculations – Subcompetencies, EPAs and Custom Subcompetencies all have a 1-5 grade scale. However, custom questions (in your own words) may have different grade scales, so the results are "normalized" to a 1-5 grade scale. The following formula is used to normalize grade scales on custom questions that are other than 1-5. All the scores are then averaged. This process allows us to include all scores in the Subcompetency average.

$$m \ + \ \frac{(p - 1)(M - m)}{n - 1}$$

Where: m = Minimum Milestone Value (0 or 1)
M = Maximum Milestone Value (4 or 5)
p = Likert position (selection chosen by evaluator)
n = Number of choices on the grade scale

- Example - A resident received the following scores on her evaluations:
  - 3.5 - Actual PC1 subcompetency (1-5 scale)
  - 3.0 - EPA mapped to PC1 (1-5 scale)
  - 3.5 - Custom Subcompetency mapped to PC1 (1-5 scale)
  - 6.0 - Custom Question mapped to PC1 (1-9 scale). The score of 6 is "normalized" using the formula above, to a score of 3.5.
- These four scores (3.5, 3.0, 3.5, 3.5) are then averaged for a score of 3.38.

Note:
Some specialties have an extra column for "Has Not Achieved Level One" or similar wording. Any evaluator responses from this column will be counted as "zero" and included in the average scores.

MILESTONES REPORT

The Milestones Report displays the results of milestone questions. These may be from Shift Cards or from any milestone narratives placed directly on regular evaluations.

Generate the Milestones Report:

1. Go to *Evaluations > Reports*
2. Select a Resident
3. Click the **Milestones** tab

This report displays the following columns:

- Training Year – The resident's scores are shown, grouped by Year in Residency.
- Competencies – Each Core Competency (Patient Care, Medical Knowledge, etc.) has its own column. The subcompetencies (PC1, PC2, etc.) are displayed under each column. The average scores from milestone questions are displayed under the proper level (Level 1, Level 2, etc.) within the subcompetencies. If a Level has an "X" for a score, no data was collected for that milestone.
    - Calculations - Milestone questions have a "Yes" or "No" grade scale. The score shown is the percentage of "Yes" selections the resident received (Number of "Yes" scores/Total number of scores).
    - Example – On a milestone question, three evaluators said "Yes, the resident is competent on this milestone." One evaluator gave a score of "No." Three of four (3/4) evaluators said 'Yes," giving the resident a score of 75% on that particular milestone.

COMPETENCY REPORT

The Competency Report displays data collected about the resident from Custom Questions (Standard questions in your own words) where the Categories have been linked to Core Competencies. The results are:

- Grouped by Core Competency
- Presented in normalized percentages for all grade scales
- Grouped by the resident's Year in Training
- Compared with Peer Average

Generate the Competency Report:

1. Go to *Evaluations > Reports*
2. By default, you will be on the **Residents** tab
3. Click a resident's name
4. Click the **Competency** tab

This report displays the following columns:

- Training Year – The resident's scores are shown, grouped by Year in Residency. Also shows Peer Average
- Core Competencies – The resident's level of competency is shown as a percentage for each Core Competency (Patient Care, Medical Knowledge, etc.)
    - Calculations – All results are converted to percentages, then averaged.
    - Example – On two Patient Care questions, a resident receives a 3 on a scale of 1-5 and a 7 on a scale of 1-9. The 3 is converted to 60% and the 7 is converted to 77.78%. These are then averaged ((60 + 77.78)/2) for a score of 78.89% in Patient Care.
- Overall – This score is an average of all scores the resident received
    - Calculations – Responses to all questions are converted to a percentage, then averaged. (It is NOT an average of the averages.)
    - Example – A resident receives a total of 50 responses. These responses are each converted to a percentage, added together and divided by 50 to get the Overall average.
- Rotation – Each of the resident's rotations are displayed below for the time period indicated, along with the average score they received for each core competency during that rotation.

Training Year	PC	MK	PBLI	ICS	PRO	SBP	OPOMM
Resident Average (1st Year in Residency)	84.29%	0.00%	0.00%	87.14%	0.00%	0.00%	0.00%
Peer Average	68.13%	0.00%	0.00%	68.13%	0.00%	0.00%	0.00%

Rotation	PC	MK	PBLI	ICS	PRO	SBP	OPOMM
JGB: Ambulatory (1st Year in Residency)	90.00%	0.00%	0.00%	90.00%	0.00%	0.00%	0.00%
JGB: Cardiology (1st Year in Residency)	80.00%	0.00%	0.00%	100.00%	0.00%	0.00%	0.00%
JGB: Consults (1st Year in Residency)	90.00%	0.00%	0.00%	90.00%	0.00%	0.00%	0.00%

PROBLEMS REPORT

The Problems Report has two sections:

Questions receiving low scores

- Resident receives a low score on a specific question on a questionnaire flagged to give Low Score notifications.
- Resident receives a low score on a specific grade scale, on any questionnaire, flagged to give Low Score notifications.

Questions scoring below a certain percentage:

- Defaults to questions scored in the bottom 25% of the grade scale.
- Can be changed to 10%, 15%, 20% or Suppressed to 0%.
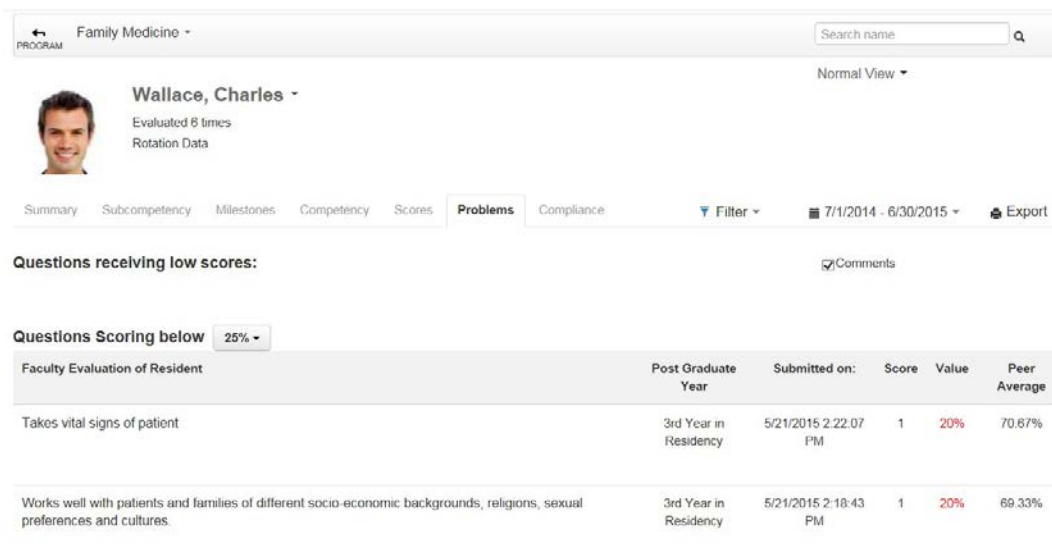
Generate the Problems Report:

1. Go to *Evaluations > Reports*
2. Select a Resident
3. Click the **Problems** tab

This report displays the following columns:

- Questionnaire – Displays the questionnaire and question text
- Post Graduate Year – Shows the resident's Year in Residency
- Submitted On – Displays the date and time the evaluation was completed
- Score – Shows the actual selection chosen by the evaluator. Examples: Poor, Excellent
- Value – Shows the value given to that score. Examples: 1, 5
- Peer Average – Displays the peer average for that question

Note: Please refer to the *Quick Start Guide, High/Low Scores - Create/Edit*, for instructions configuring Low Score Notices.

COMPLIANCE REPORT

This report displays information on the compliance rate of the resident for completing evaluations assigned to them. Evaluations are included if the End Date of the match falls within the date range of the report.

Generate the Compliance Report:

Go to *Evaluations > Reports*
Select a Resident
Click the **Compliance** tab

Columns include the following data:

- Assigned – The total number of evaluations assigned to the resident to be completed during the date range of the report
- Compliance – The number of completed evaluations, the number of assigned evaluations and the percentage of completed evaluations is shown
    - Calculations – The number of evaluations completed divided by the total number of assigned evaluations
    - Example – A resident has 50 evaluations assigned to her with Due Dates in the past. She completed 36 on time and 4 of them past the Due Date. Forty completed evaluations divided by 50 assigned equals 80%. Her Compliance column would display 40/50 (80%).
- Completed on Time – The number and percentage of evaluations completed on time (by midnight on the Due Date)
    - Calculations – The number of evaluations completed on time divided by the total number of assigned evaluations
    - Example – A resident has 50 evaluations assigned to her with Due Dates in the past. She completed 36 on time and 4 of them past the Due Date. Her "Completed on Time" column would display 36 (72%).
- Completed Late – The number and percentage of evaluations completed late (after midnight on the Due Date)
    - Calculations – The number of evaluations completed late divided by the total number of assigned evaluations
    - Example – A resident has 50 evaluations assigned to her with Due Dates in the past. She completed 36 on time and 4 of them late (past the Due Date). Four evaluations completed late divided by 50 assigned equals 8%. Her "Completed Late" column would display 4 (8%).
- NET – The number and percentage of evaluations returned as NET (Not Enough Time)
    - Calculations – The number of evaluations that were returned as NET divided by the total number of assigned evaluations
    - Example – A resident has 30 evaluations assigned to her with Due Dates in the past. She returned 5 of them as NET. Five divided by 30 equals 16.67%. Her "NET" column would display 5 (16.67%).
- Delinquent – The number of evaluations assigned to the resident that have not been completed and are past the Due Date. The delinquent evaluations are shown in the list below.

Delinquent Evaluations – The information shown on the second half of the screen includes the details about the evaluations passed their Due Date:

- Subject – The person or rotation to be evaluated
- Session – The name of the session distributing the evaluation
- Rotation – The name of the rotation for that evaluation
- Start – The Start Date of the interval
- End – The End Date of the interval
- Due – The Due Date for the evaluation to be completed

EXPORTABLE DATA REPORT

This report displays the actual scores given to each resident by each evaluator. If subcompetencies were dynamically added to the evaluation based on the rotation, these scores will also be shown. If the resident was evaluated 12 times, the scores from all 12 evaluations will be displayed. No calculations are performed on this page. The results on this tab can be exported to a spreadsheet format.

Generate the Scores Report:

1. Go to *Evaluations > Reports*
2. Select a Resident
3. Click the **Exportable Data** tab

This report displays the following information for each questionnaire:

- Evaluator – The name and picture of the evaluator
- Rotation – Name and date range of the rotation
- Questions – Lists the score and grade scale for each question.

Note: Click **Export to Excel** to export the data to a spreadsheet format.

GENERAL FEATURES

PROGRAM SELECTION

Access all the programs where you have privileges by clicking the arrow and selecting a program from the drop-down list.
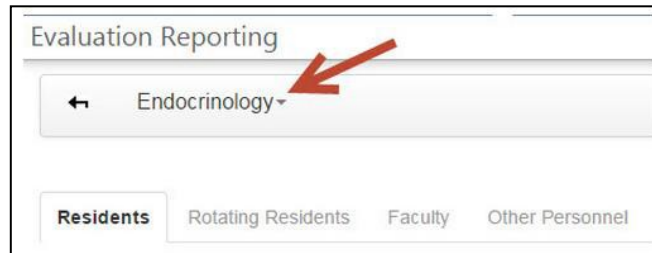
SEARCH BOX

Enter a person's first or last name to access their evaluation data.
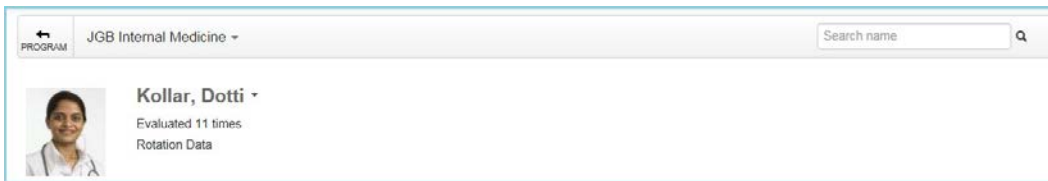
FILTER

Use the Filter to select specific questionnaires or to change the default settings for evaluation reports. The default settings are shown below.

- All Questionnaires
- All Anonymous Evaluations
- All "On Hold" Evaluations
- No evaluations from other departments
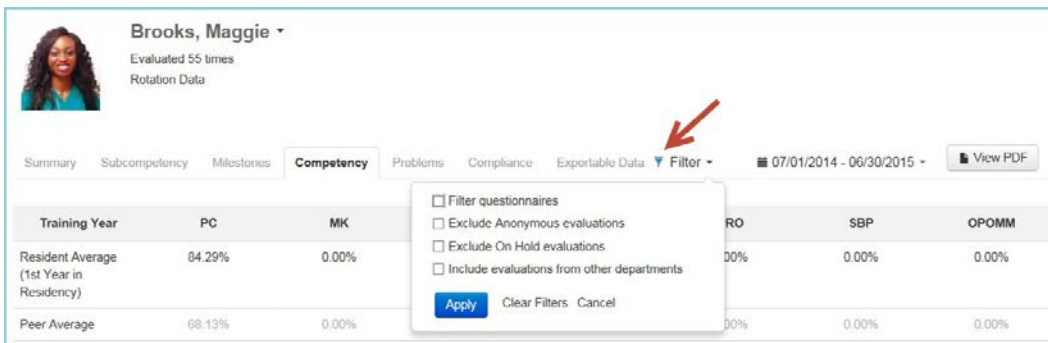
To change the default settings:

1. Click **Filter**
2. Check the appropriate boxes
3. Click **Apply**

The Filters you select will remain in place until you select another program or exit New Innovations. The Filter icon will be blue if there are any filters configured.

To clear the filters and return to the default settings:

1. Click **Filter**
2. Click **Clear Filters**

DATES

By default, the date range for your evaluation reports will be the current academic year. Click the arrow to change the time frame to:

- Last 3, 6 or 18 months
- Academic Year – Once you select an academic year, you have the option to select an interval. Click **Apply**.
- Resident Training Year
- Custom – Select a specific date range and click **Apply**

The Dates you select will remain in place until you select another program or exit New Innovations.

IDENTIFY EVALUATORS

By default, the reports will display all of the data an administrator is allowed to see, but the anonymous details (evaluator name, rotation, dates, etc.) are hidden for those matches that are anonymous. Check the box for Identify evaluators to view these details.

PRINT

The Print process varies depending on the type of report and the number of reports you are printing.

Print an Overall Program Report

Print any of the screens that display overall data about everyone in your program:

1. Go to *Evaluations > Reports*
2. Select one of the program reports: *Performance, Competency, Compliance, Subcompetency*
3. Click **View PDF**. The document will open in a new tab.
4. Hover at the bottom of the screen and click the **Printer** icon. (Your icons may appear different depending on your browser.)
5. Select your print settings.
6. Click **Print**

Print an Individual Person Report

After selecting a specific person:

1. Click **View PDF**
2. Verify that the box in front of the person you desire is checked
3. Check the boxes for the tabs (reports) you want to print
4. Click **View PDF**
5. The document will open in a new window. Hover at the bottom of the screen and click the **Printer** icon.
6. Select your print settings.
7. Click **Print**

Note:

The Exportable Data tab will not print using the standard Printer icon because of the large amount of data on this report. Click **Excel** to export the data to a spreadsheet format, which is then printable.

Print Reports for Multiple People

Select a specific person:

1. Click **View PDF**
2. Select your residents:
   a. Click **Select All** or
   b. Check the boxes in front of selected individuals
3. Check the boxes for the tabs (reports) you want printed
4. Click **View PDF**
5. Your reports will be generated and emailed to you momentarily. Open the email and print the report.

LEGACY REPORTS

Currently you can toggle between the new Evaluation Reports and the Legacy Evaluation Reports. However, the legacy reports will not be available later this year. We will notify users of this date.

To return to the Legacy (Original) Evaluation reports, click **Go to Legacy reports** in the top right corner. Click **Exit legacy reports** to return to the new evaluation reports.
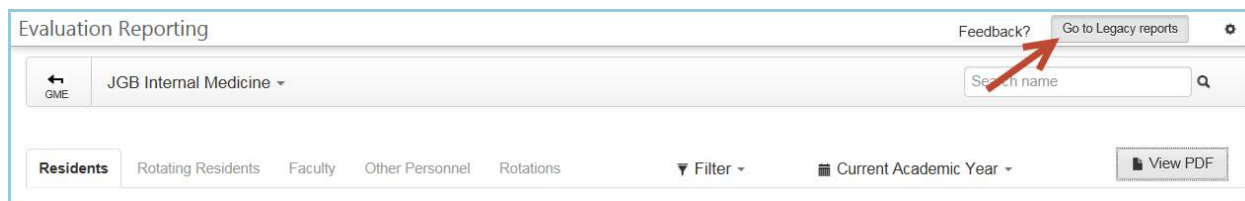
FACULTY REPORTS

GME LEVEL REPORTS

Select a principal sponsor for a global view of the evaluation information for the programs linked to that principal sponsor. In the Sponsor drop-down list, select **Others** to view all programs not linked to a principal sponsor. For each program the following information is displayed for the date range selected. The date range defaults to the current academic year.

- Resident count – Total number of residents in the program
- Unmatched residents – The total number of residents who have not been included as a Subject in an evaluation match
- Distributed – Total number of evaluations distributed within the program
- Completed/Overall Compliance – Total number of evaluations completed and the percentage of evaluations completed of those distributed within the program (All Evaluators)
- Faculty Compliance – Percentage of completed evaluations where the evaluator had a Work Role of Faculty (Faculty Only)
- On Time – The number of evaluation completed on time (All Evaluators)
- Late – The number of evaluations completed past the due date (All Evaluators)
- NET – Number of evaluation returned as NET - Not Enough Time (All Evaluators)
- Incomplete – Total number and percentage of evaluations that are incomplete (All Evaluators)
- Overdue – Total number of evaluations are past the due date. For example, if the Due Date for an evaluation was yesterday or earlier and the End Date of the match falls within the date range of the report and the evaluation has not been completed, it will be included in this count. (All Evaluators)
- Click Export to export the data to a spreadsheet format that can be printed.

Click on a Program to view the data for that program.

PROGRAM LEVEL FACULTY REPORTS

Click the **Faculty** tab. There are two program level reports available to view results for evaluations of faculty: Performance and Compliance. These reports display your faculty, plus any outside faculty who have been the subject of an evaluation distributed by your department.

PERFORMANCE REPORT

This screen displays all of your faculty, plus any outside faculty who have been the subject of an evaluation distributed by your department. It shows:

- Faculty name
- Number of times they have been evaluated
- Number of evaluations distributed where they are the subject that have not been completed (in parenthesis)
- Number of low scores, as configured on your questions or grade scales

Generate the Performance Report:

1. Go to Evaluations > Reports
2. Select the Program
3. Click on the Faculty tab
4. The page defaults to the Performance Report

COMPLIANCE REPORT

The Compliance Report displays information for evaluations that were assigned to a faculty member and are past their Due Date. This screen displays your faculty, plus any outside faculty who have been the subject of an evaluation distributed by your department.

For the data to be included on this report:

- The End Date of the match must fall within the date range of the report
- The Due Date is in the past

Generate the Compliance Report:
1. Go to *Evaluations > Reports*
2. Select the Program
3. Click on the **Faculty** tab
4. Click the arrow beside Performance
5. Select **Compliance**

INDIVIDUAL FACULTY REPORTS

Click on a faculty member's name to view the individual reports.

SUMMARY REPORT

The Summary Report displays the following information:

- Average score received for the question
- Peer average for the question
- Minimum sore received
- Maximum score received
- Standard Deviation
- Comments

Generate the Summary Report:

Go to *Evaluations > Reports*
Select the Program
Click on the **Faculty** tab and select a faculty member
The screen defaults to the **Summary** tab
Click the box for **Scoring Details** to displays a bar graph for each question
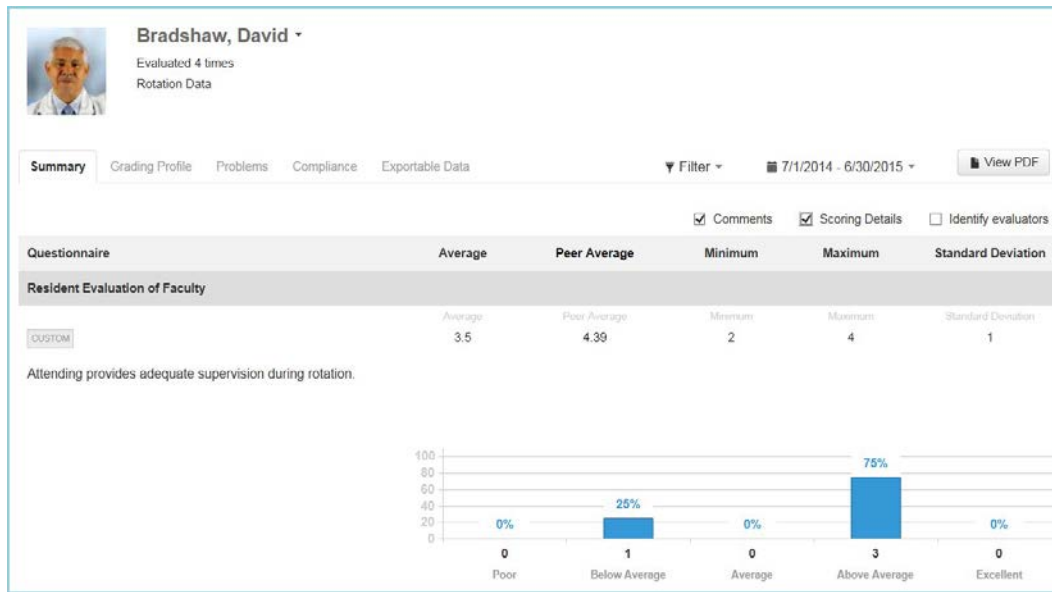
GRADING PROFILE

The Grading Profile compares how this faculty member scored their subjects as compared to other faculty members. This screen displays the following information:

- Question text for each questionnaire
- This faculty member's grading average on each question
- The average score given by their peers for each question

Generate the Grading Profile:

1. Go to *Evaluations > Reports*
2. Select the Program
3. Click on the **Faculty** tab
4. Select a faculty member
5. Click the **Grading Profile** tab

PROBLEMS

The Problems Report displays the following information:

- Displays questions receiving low scores, as configured on grade scales or questions
- Displays questions scoring below percentage selected on the page
- Displays comments, by default

Generate the Problems Report:

1. Go to *Evaluations > Reports*
2. Select the Program
3. Click on the **Faculty** tab
4. Select a faculty member
5. Click the **Problems** tab

COMPLIANCE REPORT

This report displays compliance information for faculty members completing their evaluations.

This report shows the following data:

- Assigned – The number of evaluations assigned to the faculty for the time period of the report
- Compliance – The number and percentage of evaluations that have been completed
- Completed On Time – The number and percentage of completed evaluations that were completed before the Due Date
- Completed Late – The number and percentage of completed evaluations that were completed after the Due Date
- NET – The number and percentage of evaluations that were returned by the faculty member as NET (Not Enough Time)
- Delinquent – The number of evaluations that are currently past their Due Date
- The chart on the bottom half of the screen displays details about the evaluations that are currently delinquent

Generate the Compliance Report:

1. Go to *Evaluations > Reports*
2. Select the **Program**
3. Click on the **Faculty** tab
4. Select a faculty member
5. Click the **Compliance** tab

EXPORTABLE DATA

The Exportable Data tab displays the following information:

- Name of the evaluator
- Name and date range of the rotation
- The individual scores given by the evaluator on each question

Generate the Exportable Data:

1. Go to *Evaluations > Reports*
2. Select the Program
3. Click on the **Faculty** tab
4. Select a faculty member
5. Click the **Exportable Data** tab
6. Click the **Excel** button to export data to a spreadsheet format that can be printed

ROTATING RESIDENTS REPORTS

PROGRAM OVERVIEW

The Rotating Residents tab displays the evaluation data collected on outside residents who have served on one of your program's rotations.

A person will appear on the Rotating Residents tab if they:

- Have a Resident work role
- Have a Personnel record in an outside program
- Have been evaluated on a questionnaire from one of your sessions

There are two reports under the Rotating Residents tab: Performance and Competency. These will both be reviewed in detail below.

PERFORMANCE REPORT

The Performance Report provides an overview of the performance data collected on all rotating residents. This screen only displays evaluation data that originated from your department.

1. Go to *Evaluations > Reports*
2. Click the **Rotating Residents** tab
3. By default, you will be on the **Performance** tab

The following information is displayed:

- Resident name
- Number of times the resident has been evaluated
- Number of evaluations distributed but not yet completed (Shown in parenthesis)
- Number of low scores received, as configured by Low Score notifications on grade scales or questions

COMPETENCY REPORT

1. Click the arrow beside Performance
2. Select **Competency**

This screen displays the overall averages of rotating residents on the six core competencies.

INDIVIDUAL REPORTS

There are four Performance Reports that provide detailed evaluation information collected on a specific resident. When you click on a resident's name, you will be taken to the first page of the resident's report, the Summary Report.

The resident's name and photo will appear at the top left of the report, along with the total number of times this resident has been evaluated during the time span indicated. By default, results are displayed for current academic year.
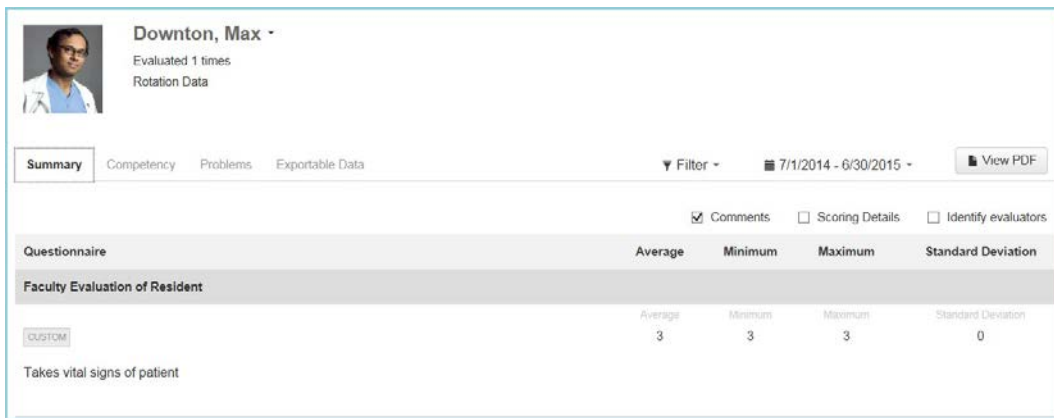
SUMMARY REPORT

The Summary Report shows the results from every question on every questionnaire that was used to evaluate the resident/fellow. The default time frame is the current academic year. Comments are displayed by default.

The columns on the Summary Report include:

- Questionnaire – Displays the Name and Title of the questionnaire
- Label – Describes what type of question it is: EPA, Milestone, Direct (Subcompetency), Custom (in your own words), Custom Subcompetency
- Question – Shows the actual question text from the questionnaire
- Average – Displays the average score the resident received on each question
- Minimum – Displays the lowest score given to the resident
- Maximum – Shows the highest score given to the resident
- Standard Deviation – Displays the variation or dispersion of the results from the average score

Generate the Summary Report:

1. Go to *Evaluations > Reports*
2. Click the **Rotating Residents** tab
3. Select a Resident
4. By default, you will be on the **Summary** tab
5. Check the box for **Scoring Details** to view a graphic display of the results. The number of responses given is shown under each level of the grade scale. The graphic for Yes/No questions differs from the multiple choice grade scale.

COMPETENCY REPORT

The Competency Report displays data collected about the resident from Custom Questions (Standard questions in your own words) where the Categories have been linked to Core Competencies. The results are:

- Grouped by Core Competency
- Presented in normalized percentages for all grade scales

Generate the Competency Report:

1. Go to *Evaluations > Reports*
2. Click the Rotating Residents tab
3. Click a resident's name
4. Click the Competency tab

PROBLEMS REPORT

The Problems Report has two sections:

Questions receiving low scores:

- Resident receives a low score on a specific question on a questionnaire flagged to give Low Score notifications
- Resident receives a low score on a specific grade scale, on any questionnaire, flagged to give Low Score notifications.
- Please refer to the *Quick Start Guide, High/Low Scores - Create/Edit*, for instructions configuring Low Score Notices.

Questions scoring below a certain percentage:

- Defaults to questions scored in the bottom 25% of the grade scale
- Can be changed to 10%, 15%, 20% or Suppressed to 0%.

Generate the Problems Report:

1. Go to *Evaluations > Reports*
2. Click the **Rotating Residents** tab
3. Click a resident's name
4. Click the **Problems** tab

EXPORTABLE DATA

This report displays the actual scores given to each resident by each evaluator. Your program's subcompetencies would not have been dynamically added to the evaluation based on the rotation if the rotating resident is from a different subspecialty.

Generate the Scores Report:

1. Go to *Evaluations > Reports*
2. By default, you will be on the **Rotating Residents** tab
3. Click a resident's name
4. Click the **Scores** tab
5. Click **Export to Excel** to export the data to a spreadsheet format

PROGRAM OVERVIEW

The *Other Personnel* tab displays evaluation information under two sections:

- Residents in this program with no Training Record - Please go to *Personnel > Personnel Records* and create a Training Record for any resident listed here. Their evaluation results will then appear on the *Residents* tab.
- Other evaluated people in this department – This would include all people who have a Work Role other than Faculty or Resident, such as Nurse or Other.

There are two reports that give you Program level data: Performance Report and Competency Report. These will both be reviewed in detail below.
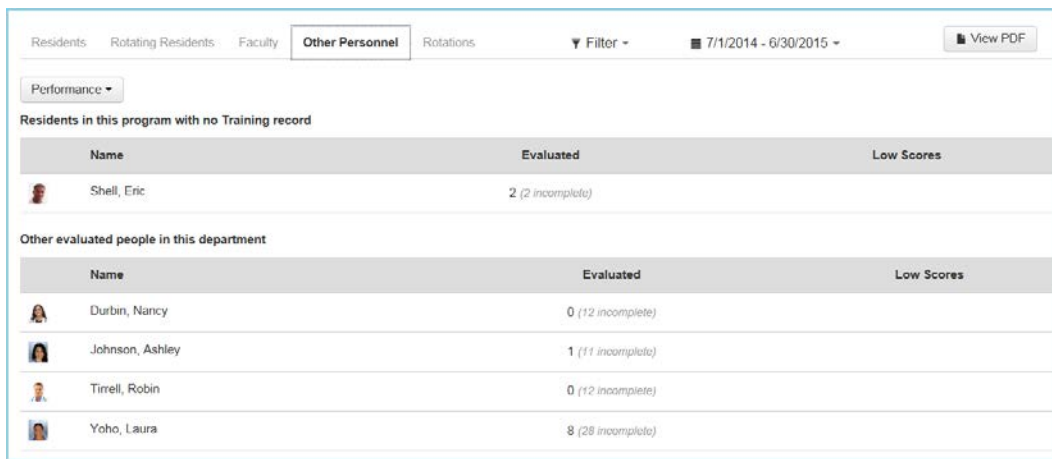
PERFORMANCE REPORT

The Performance Report provides an overview of the performance data collected on all other personnel. This screen only displays evaluation data that originated from your department.

1. Go to *Evaluations > Reports*
2. Click the **Other Personnel** tab
3. By default, you will be on the **Performance** tab

The following information is displayed:

- Name and picture of the person
- Number of times the person has been evaluated
- Number of evaluations distributed about this person, but not yet completed (shown in parenthesis)
- Number of low scores received, as configured by Low Score notifications on grade scales or questions

COMPETENCY REPORT

1. Go to *Evaluations > Reports*
2. Click the **Other Personnel** tab
3. By default, you will be on the **Performance** tab
4. Click the arrow beside Performance and select **Competency**

This screen displays the overall averages of the other personnel on the six core competencies.

	Name	PC	MK	PBLI	ICS	PRO	SBP	OPOMM	Overall
	Shell, Eric	70.00%	N/A	N/A	70.00%	N/A	N/A	N/A	70.00%

Other evaluated people in this department

	Name	PC	MK	PBLI	ICS	PRO	SBP	OPOMM	Overall
	Durbin, Nancy	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	Johnson, Ashley	60.00%	N/A	N/A	60.00%	N/A	N/A	N/A	60.00%
	Tirrell, Robin	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	Yoho, Laura	N/A	N/A	N/A	91.25%	92.50%	N/A	N/A	91.67%

INDIVIDUAL REPORTS

There are four Performance Reports that provide detailed evaluation information collected on a specific person. When you click on a person's name, you will be taken to the Summary Report.

The person's name and photo will appear at the top left of the report, along with the total number of times this person has been evaluated and the Rotation Data for the time span indicated. By default, results are displayed for the current academic year.

SUMMARY REPORT

The Summary Report shows the results from every question on every questionnaire that was used to evaluate the person. The default time frame is the current academic year. Comments are displayed by default.

The columns on the Summary Report include:

- Questionnaire – Displays the Name and Title of the questionnaire
- Label – Describes what type of question it is: EPA, Milestone, Subcompetency, Custom (in your own words) and Custom Subcompetency
- Question – Displays the actual question text from the questionnaire
- Average – Displays the average score the person received on each question
- Minimum – Displays the lowest score given to the person
- Maximum – Displays the highest score given to the person
- Standard Deviation – Displays the variation or dispersion of the results from the average score.

Generate the Summary Report:

1. Go to *Evaluations > Reports*
2. Click the **Other Personnel** tab
3. Select a Person
4. By default, you will be on the **Summary** tab
5. Check the box for **Scoring Details** to view a graphic display of the results. The number of responses given is shown under each level of the grade scale. The graphic for Yes/No questions differs from the multiple choice grade scale.
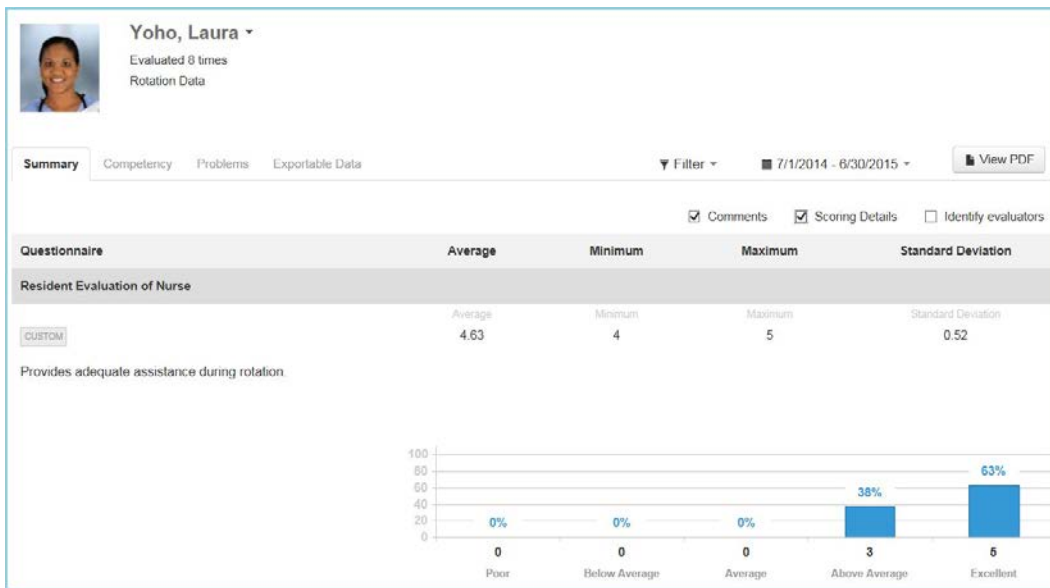
COMPETENCY REPORT

The Competency Report displays data collected about the person from Custom Questions (standard questions in your own words) where the Categories have been linked to Core Competencies. The results are:

-   Grouped by Core Competency
-   Presented in normalized percentages for all grade scales

Generate the Competency Report:

1. Go to *Evaluations > Reports*
2. Click the **Other Personnel** tab
3. Click a person's name
4. Click the **Competency** tab

PROBLEMS REPORT

The Problems Report has two sections:

Questions receiving low scores:

- Person receives a low score on a specific question on a questionnaire flagged to give Low Score notifications
- Person receives a low score on a specific grade scale, on any questionnaire, flagged to give Low Score notifications.
- Please refer to the *Quick Start Guide, High/Low Scores - Create/Edit*, for instructions configuring Low Score Notices.

Questions scoring below a certain percentage:

- Defaults to questions scored in the bottom 25% of the grade scale
- Can be changed to 10%, 15%, 20% or Suppressed to 0%

Generate the Problems Report:

1. Go to *Evaluations > Reports*
2. Click the **Other Personnel** tab
3. Click a person's name
4. Click the **Problems** tab

EXPORTABLE DATA

This report displays the actual scores given to each person by each evaluator.

Generate the Scores Report:

1. Go to *Evaluations > Reports*
2. By default, you will be on the **Other Personnel** tab
3. Click a person's name
4. Click the **Scores** tab

ROTATIONS REPORTS

The Rotations report allows you to view the evaluation results submitted by your residents and fellows about their rotation experience. The following information is displayed:

- Rotation name
- Number of times the rotation has been evaluated
- Number of rotation evaluations distributed but not yet completed (shown in parenthesis)
- Number of low scores received, as configured by Low Score notifications on grade scales or questions

Generate the Rotations report:

1. Go to *Evaluations > Reports*
2. In the top right corner, for "Beta Report View," click **Off**
3. If you have access to more than one program, select a program from the dropdown list
4. Click the **Rotations** tab

SUMMARY TAB

The Summary tab shows the questions asked about the rotation experience. It includes the Average score on this question, the Minimum and Maximum scores and the Standard Deviation. Comments are shown by default.

1. Go to *Evaluations > Reports*
2. If you have access to more than one program, select a program from the dropdown list
3. Click the **Rotations** tab
4. Click on a rotation name
5. Check the box for *Scoring Details* to display a graph of the responses

In the screen shot shown below:

- The Geriatrics rotation was evaluated 7 times
- The first question:
  - Has an average of 4.29 on a 5-point scale
  - Received 5 responses for Above Average and 1 response for Excellent
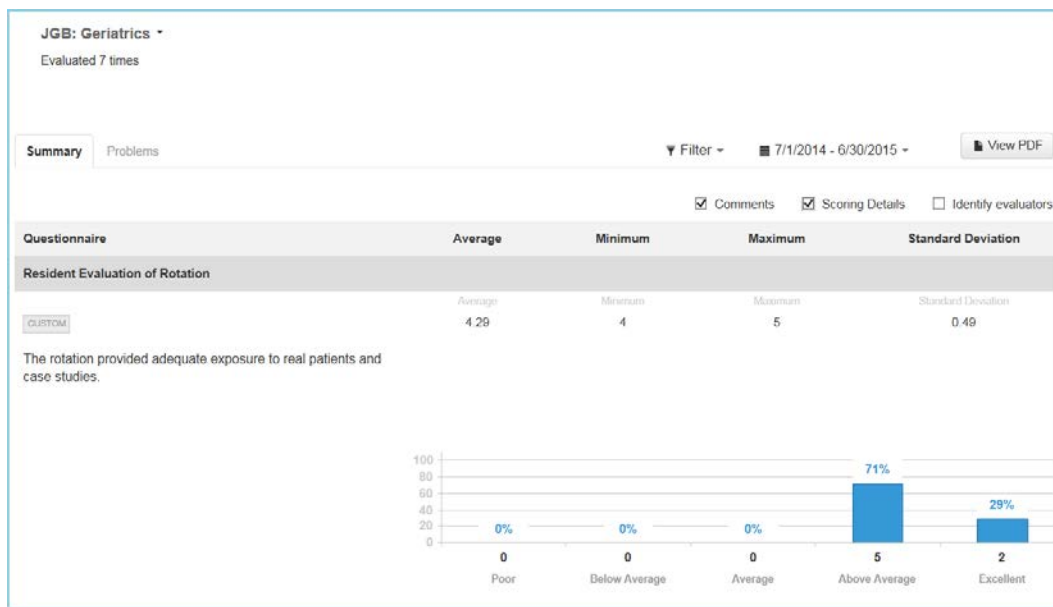
PROBLEMS TAB

This screen displays any problems areas with Rotation evaluations. There are two sections to this screen:

- **Low Score Notices** – This This area displays any questions that have received a low score where Low Score notices have been configured, either on the grade scale or on a question on the evaluation form.
- **Questions Scoring below 25%** - This area displays any scores that are in the bottom 25% of the grade scale. The percentage can be modified to 10%, 15% or 20%. This area can also be *Suppressed* to not appear on this report at all.

Generate the Problems Report

1. Go to *Evaluations > Reports*
2. In the top right corner, for "Beta Report View," click **Off**
3. If you have access to more than one program, select a program from the drop-down list
4. Click the **Rotations** tab
5. Click on the **Problems** tab

FACULTY ADVISOR AND RESIDENT VIEWS

FACULTY VIEW

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

*   Go to *Evaluations > Reports*
*   Click the **Summary** Tab

SUMMARY REPORT

This report displays the following information:

*   Name of the Questionnaire
*   Question text
*   Their average on that question
*   The Minimum and Maximum scores received, along with the Standard Deviation
*   Check **Scoring Details** to view a graphic representation of the results
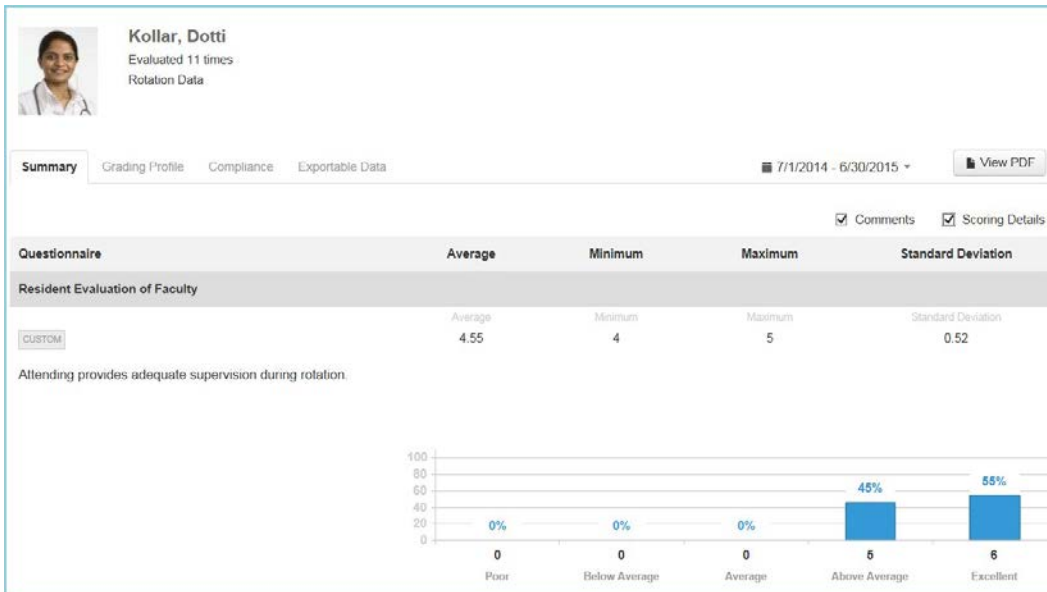
GRADING PROFILE REPORT

This tab displays how the faculty member scores the residents (or others) as compared with how their peers score the residents.

The information shown is:

- The name of the questionnaire
- The question text
- The average grade they gave the resident on that question
- The average grade their peers gave on that question

COMPLIANCE REPORT

This report shows if the faculty member is compliant with completing evaluations assigned to them.

The top line of information shows:

- Assigned – The total number of evaluations assigned to the faculty member for the date range of the report
- Compliance – The number of completed evaluations out of the total assigned. The percentage of completed evaluations is shown in parenthesis.
- Completed On Time – The number and percentage of evaluations that were completed by the Due Date
- Completed Late – The number and percentage of evaluations that were completed after the Due Date
- NET – The number and percentage of evaluations that were returned as NET (Not Enough Time)
- Delinquent – The number of evaluations that are currently assigned to the faculty member and are past the Due Date

The next section displays a list of the evaluations that are currently assigned to the faculty member and are past their Due Date.

EXPORTABLE DATA

This tab shows the actual scores given to the faculty member on each question. Click **Excel** to export this data to an Excel file.

ADVISOR VIEW

For those faculty members who are Advisors for residents and fellows, an extra tab will be available to see the evaluation results of their Advisees.

- Go to *Evaluations > Reports*
- Click the **Advisee** tab

OVERALL REPORT

The Advisor can view all of their Advisees on this screen including:

- Name, picture, program, and Year in Year in Residency of the trainee
- Evaluated – The number of evaluations completed on the resident and in parenthesis, the number of evaluations assigned to evaluators about the resident that have not been completed yet
- Low Scores – The number of Low Scores the resident received

INDIVIDUAL ADVISEE REPORT

Click on a resident's name to view the details. Select each tab to view the evaluation data gathered on the resident. See the details listed in the resident reports above.

Notes:

- Advisors are configured in each resident's Personnel record. (Go to *Personnel > Personnel Records*. Select a resident and click **Basic Information**. Select the Advisor and click **Save**.)
- On anonymous evaluations, Administrators must give permission for Advisors to see the evaluation results. This is done on the Settings tab of the session that distributed the resident evaluations.

RESIDENT VIEW

Residents and Fellows can view the results of evaluations completed on them if the administrator has allowed them (subject) to see their results.

- Go to *Evaluations > Reports*
- Click the **Summary** Tab

SUMMARY REPORT

The Summary Report shows the results from every question on every questionnaire that was used to evaluate the resident/fellow. Comments are displayed by default.

This report displays the following information:

- Name of the Questionnaire
- Question text
- Their Average score on that question
- The Minimum and Maximum scores received, along with the Standard Deviation
- Check Scoring Details to view a graphic representation of the results
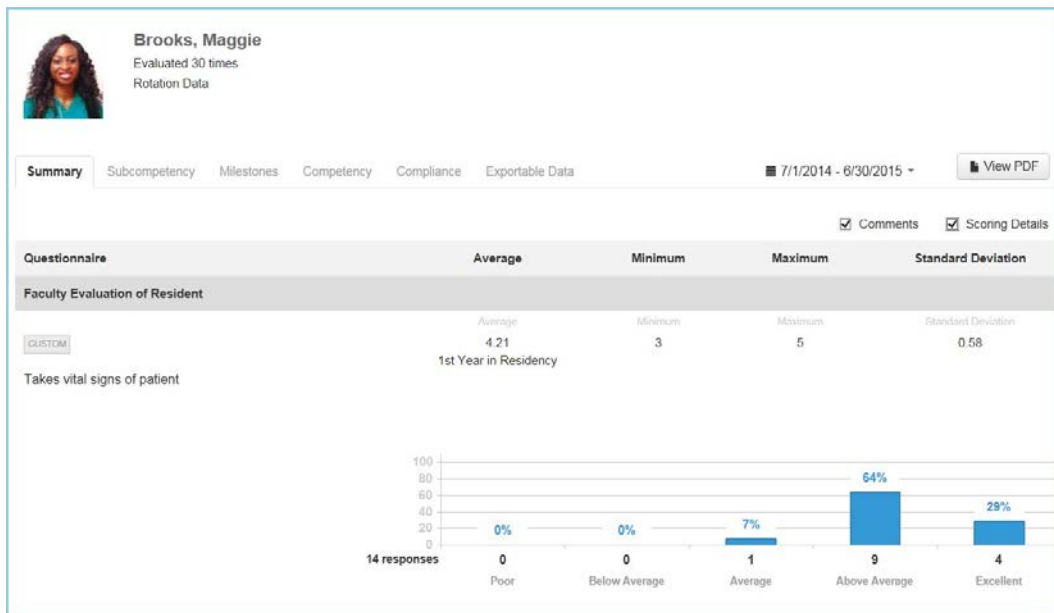
SUBCOMPETENCY REPORT

The Subcompetency tab displays the results of evaluations completed on the resident where the questionnaires contain the following:

- Actual subcompetencies
- Responses mapped to subcompetencies, such as EPAs, custom subcompetencies and custom questions (in your own words)

This report displays the following columns:

- Training Year – The resident's scores are shown grouped by Year in Residency
- Competencies – Each Core Competency has its own column. Within each column the subcompetencies are displayed with the average score the resident has received on that subcompetency.
  - Calculations – Subcompetencies, EPAs and Custom Subcompetencies all have a 1-5 grade scale. However, custom questions (in your own words) may have different grade scales, so the results are normalized to a 1-5 grade scale. The following formula is used to normalize grade scales on custom questions that are other than 1-5. All the scores are then averaged. This process allows us to include all scores in the Subcompetency average.

$$m \; + \; \frac{(p - 1)(M - m)}{n - 1}$$

Where: m = Minimum Milestone Value (0 or 1)
M = Maximum Milestone Value (4 or 5)
p = Likert position (selection chosen by evaluator)
n = Number of choices on the grade scale

- Example - A resident received the following scores on her evaluations:
  - 3.5 - Actual PC1 subcompetency (1-5 scale)
  - 3.0 - EPA mapped to PC1 (1-5 scale)
  - 3.5 - Custom Subcompetency mapped to PC1 (1-5 scale)
  - 6.0 - Custom Question mapped to PC1 (1-9 scale). The score of 6 is "normalized" using the formula above, to a score of 3.5.
- These four scores (3.5, 3.0, 3.5, 3.5) are then averaged for a score of 3.38.

MILESTONES REPORT

The Milestones tab displays the results of milestone questions. These may be from Shift Cards or from any milestone narratives placed directly on regular evaluations.

This report displays the following columns:

- Training Year – The resident's scores are shown, grouped by Year in Residency.
- Competencies – Each Core Competency (Patient Care, Medical Knowledge, etc.) has its own column. The subcompetencies (PC1, PC2, etc.) are displayed under each column. The average scores from milestone questions are displayed under the proper level (Level 1, Level 2, etc.) within the subcompetencies. If a Level has an "X" for a score, no data was collected for that milestone.
  - Calculations – Milestone questions have a Yes or No grade scale. The score shown is the percentage of Yes selections the resident received (number of Yes scores/total number of scores).
  - Example – On a milestone question, three evaluators said Yes, the resident is competent on this milestone. One evaluator gave a score of No. Three of four (3/4) evaluators said Yes, giving the resident a score of 75% on that one milestone.

COMPETENCY REPORT

The Competency tab displays data collected about the resident from Custom Questions (standard questions in your own words) where the Categories have been linked to Core Competencies. The results are:

- Grouped by Core Competency
- Presented in normalized percentages for all grade scales
- Grouped by the resident's Year in Training
- Compared with Peer Average

This report displays the following columns:

- Training Year – The resident's scores are shown, grouped by Year in Residency. Also shows Peer Average.
- Core Competencies – The resident's level of competency is shown as a percentage for each Core Competency (Patient Care, Medical Knowledge, etc.)
  - Calculations – All results are converted to percentages and then averaged.
  - Example – On two Patient Care questions, a resident receives a 3 on a scale of 1-5 and a 7 on a scale of 1-9. The 3 is converted to 60% and the 7 is converted to 77.78%. These are then averaged ((60 + 77.78)/2) for a score of 78.89% in Patient Care.
- Overall – This score is an average of all scores the resident received
  - Calculations – Responses to all questions are converted to a percentage, then averaged. (It is NOT an average of the averages.)
  - Example – A resident receives a total of 50 responses. These responses are each converted to a percentage, added together and divided by 50 to get the Overall average.
- Rotation – Each of the resident's rotations are displayed below for the time period indicated, along with the average score they received for each core competency during that rotation.

COMPLIANCE REPORT

This report shows if the resident is compliant with completing evaluations assigned to them. The top line of information shows:

- Assigned – The total number of evaluations assigned to the resident for the date range of the report
- Compliance – The number of completed evaluations out of the total assigned. The percentage of completed evaluations is shown in parenthesis.
- Completed On Time – The number and percentage of evaluations that were completed by the Due Date
- Completed Late – The number and percentage of evaluations that were completed after the Due Date
- NET – The number and percentage of evaluations that were returned as NET (Not Enough Time)
- Delinquent – The number of evaluations that are currently assigned to the resident and are past the Due Date

The next section displays a list of the evaluations currently assigned to the faculty member and are past their Due Date.

EXPORTABLE DATA

This tab shows the actual scores given to the resident on each question. Click **Excel** to export this data to an Excel file.

LOGGER

For detailed instructions, go to Help > Knowledge Base > Quick start guides (on the right). Scroll down and find Procedure Logger.

For instructions on how to check a resident's privilege level, go to Help > Knowledge Base > Quick start guides (on the right). Scroll down to Logger and click on Logger Quick Start Guides. Under Procedure Logger > Manage, click on Check a Resident's Privilege Level.

CONFERENCES

For detailed instructions, go to Help > Knowledge Base > Quick start guides (on the right). Scroll down and find Conferences.

PORTFOLIO

For detailed instructions, go to Help > Knowledge Base > Quick start guides (on the right). Scroll down and find Portfolio Reviews.

SUPPLEMENTS

HOW TO ENTER A SUPPLEMENT

1. Go to *Personnel > Compensation > Supplements*
2. Click **Add Supplement**
3. Select Resident/Fellow name from drop down box (all active Residents/Fellows are listed)
4. Select Type of supplement being entered
   a. Award/Bonus/Incentive
   b. Chief Supplement
   c. Extra Call for Extra Pay
   d. Other Services
5. Select Bill To (all available Bill To locations/CFS are listed)
6. Select Lump Sum or Monthly
7. Select Payout Date
   a. If Lump Sum, select Payout Date (Month/Year)
      i. Deadline for entering supplemental pay is end of business on the 5th calendar day of the month in which it is to be paid
   b. If Monthly, select begin Payout Date (Month/Year) and end Payout Date (Month/Year)
      i. Monthly supplements cannot cross over multiple appointment agreements
   c. If deadline for Payout Date has passed, the following error message appears at bottom of screen

> The deadline for May has passed. Please select a future date.

If there is not a current contract for the payout date(s) you selected, the following error message appears:

> Supplement dates must fall within a single personnel contract.

8. Enter Amount
   a. If less than $100, the following warning message appears confirming if you want to add the supplement

> www.new-innov.com says: ✕
>
> This supplement has a pay out less than $100. Are you sure you want to add this supplement?
>
> ☐ Prevent this page from creating additional dialogs.
>
> **OK**   Cancel
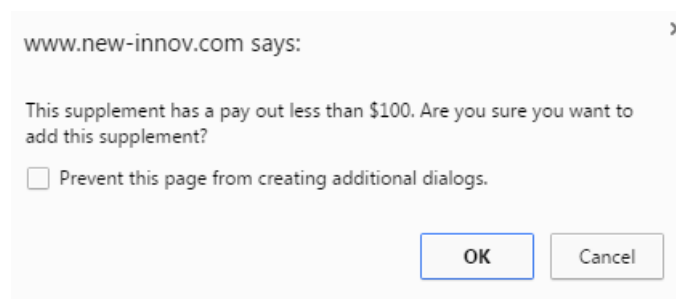
b. If more than $5,000, the following warning message appears:

www.new-innov.com says: ✕

This supplement has a pay out greater than or equal to $5,000. Are you
sure you want to add this supplement?

☐ Prevent this page from creating additional dialogs.
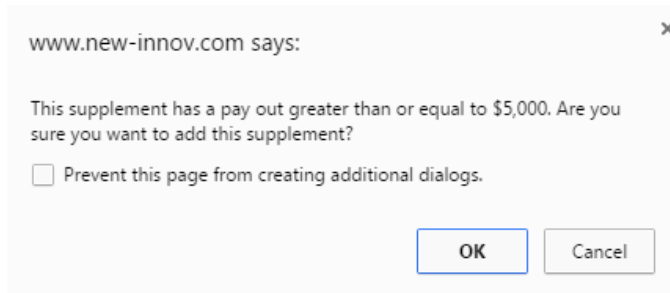
                                              [OK]   [Cancel]

c. Click **OK** to add or **Cancel** to return to previous page
9. Enter Notes
10. Click **Save**

HOW TO EDIT A SUPPLEMENT

1. Go to *Personnel > Compensation > Supplements*
2. Click **Edit** button on right of supplement you would like to edit
   a. Edit Supplement screen appears (same screen as when you add a supplement)
3. Make edits to the fields you need to change
4. Click **Save**

If the resident/fellow is on a visa, it is indicated on the Supplemental Manage page

Resident/Fellow	Type	Bill To	Payout Date(s)	Amount	Notes	Submitted	Visa	
Abdel-Gawad, Noha Mohamed Rady	Extra Call for Extra Pay	ANES-Default/02-25200400-33030-12	06/2016	$100.00	visa test	5/24/2016 by Phyllis Rhodes	✓	Edit ▾

TO VIEW DELETED SUPPLEMENTS

1. Go to *Personnel > Compensation > Supplements*
2. Click **Report** tab.
3. Scroll to bottom of page and click **Show deleted** in left bottom corner of page.
4. Deleted supplements will appear below all Approved supplements.

21615	Zhang, Hao Chi	Award/Bonus/Incentive	MHHS SUPPL	Lump Sum	08/2016	$50.00	$3.83	$0.35	$1.63	$55.81	Orientation	Approved	7/21/2016 by Kimberly Bibbs	7/27/2016 by Florinda Guerra
21287	Zhang, Lin	Award/Bonus/Incentive	THECB/02-25061500-33199-12	Lump Sum	08/2016	$100.00	$7.65	$0.69	$3.25	$111.59	orientation supplement June 27-28	Approved	7/15/2016 by Esmardia Garza	7/27/2016 by Florinda Guerra
21287	Zhang, Lin	Award/Bonus/Incentive	MHHS SUPPL	Lump Sum	08/2016	$100.00	$7.65	$0.69	$3.25	$111.59	orientation supplement June 29-30	Approved	7/15/2016 by Esmardia Garza	7/27/2016 by Florinda Guerra
17483	Zheng, Steven William	Extra Call for Extra Pay	RAD-MSRDP/02-25881000-33081-12	Lump Sum	08/2016	$825.00	$63.11	$5.69	$26.81	$920.61	After hours coverage for Upper Kirby in July 2016	Approved	8/1/2016 by Lea Roberts	8/2/2016 by April Bass

Hide deleted

Resident/Fellow	Type	Bill To	Frequency	Payout Date(s)	Amount	Notes	Status	Submitted	Confirmed	Deleted
Soniely Lugo-Ruiz	Award/Bonus/Incentive	THECB/02-25061500-33199-12	Lump Sum	08/2016	$50.00	Payment for Orientation Days	Approved	8/2/2016 by Aurora Ramirez	8/2/2016 by April Bass	8/10/2016 by Florinda Guerra
Soniely Lugo-Ruiz	Award/Bonus/Incentive	MHHS - Memorial Hermann Hospital - TMC	Lump Sum	08/2016	$50.00	Payment for Orientation Days	Approved	8/2/2016 by Aurora Ramirez	8/2/2016 by April Bass	8/10/2016 by Florinda Guerra
Rod Turner	Award/Bonus/Incentive	MHHS SUPPL	Lump Sum	08/2016	$250.00	Orientation	Pending	7/15/2016 by Angelica Lopez		7/15/2016 by Angelica Lopez
Raymundo Quintana Quezada	Other Services	IM-Vent/02-25420000-36497-18-12256	Lump Sum	08/2016	$195.00	ATC 2016	Pending	7/26/2016 by Phyllis Martin		7/26/2016 by Monica Garcia
Nana Ama Ankumah	Chief Supplement	OBG-Default/02-25600004-33056-12	Lump Sum	08/2016	$1,000.00	Chief Pay for Aug	Pending	8/1/2016 by Adina Cohen		8/1/2016 by Adina Cohen