The materials contained on this book are protected under the copyright laws of the United States. New Innovations grants to the original recipient of these materials, a non-exclusive, nontransferable, revocable license to use the contents of this book for personal use only. Licensee may not copy, modify, transfer, reproduce, distribute, or make any other use of this book or the materials contained hereon.
Hello and Welcome,

Thank you to all in attendance at the NI Fall 2015 Coordinator Conference and GME Seminar.

This is truly one of the most remarkable events on the New Innovations calendar. This conference gives us a chance to get to know each of you personally, as well as gain insight into your roles. As you go through the special tips and tricks provided by our friendly NI Trainers and Support Staff, we hope you will keep the following guidance in mind.

1. Embrace this time with your peers. Take the opportunity to get acquainted with those around you and learn from their experiences. Someone else in attendance may have already resolved some of the daily struggles faced by your institution.

2. Explore Cleveland with animated curiosity. This city is currently in the midst of change and alive with palpable energy. There are many local restaurants, museums, and events that will certainly pique your interest.

3. Take back as much as you can. Although you are presented with a lot of information, please do not hesitate to tap into the know-how of our trainers. Take your newfound expertise and share it with others in your institution. The more people that share your knowledge, the more efficient you will all become.

We truly appreciate each and every one of you, and all you do for your institutions. Your work ensures the education of those who will one day better the health and lives of our friends and family. While this is no small task, we hope that the tips provided by our NI Training Staff help to make your roles a bit easier and your process more efficient.

Thank you again for all you do; and for being a part of the 2015 NI Fall Conference.

Best Wishes,

Steve & Denise Reed
Shuttle Guidelines

1. The Shuttle runs daily in the morning and afternoon from the InterContinental (IC) Suites & the InterContinental (IC) Conference Center. See the shuttle schedule for times.

2. Please pick up the shuttle at the front door of your hotel.

3. You need a ticket to ride the evening shuttle. However, you don’t need a ticket to ride the shuttle between the InterContinental (IC) Suites & the InterContinental (IC) Conference Center.

4. During registration and lunch, you have the opportunity to sign-up for the evening shuttles.
   a. Each shuttle will have different colored tickets
   b. You must have the colored ticket that correlates to the shuttle you wish to ride
   c. You can now sign up for shuttle tickets online. Please go to the conference website from your home page and click on the “Reserve Shuttle Ticket” link.
   d. If there are still shuttle spaces available, you can sign up during registration.
   e. When you get on the shuttle, the shuttle driver will collect your ticket. If your ticket doesn’t match the shuttle you are trying to ride, you will not be permitted to take that shuttle
   f. You only need your ticket when you are leaving the hotel in the evening to ensure you signed up for the shuttle
   g. You won’t need a ticket for your return trip to the hotel

5. The shuttles will pick up guests from the IC Conference Center & the IC Suites Hotel.

6. The times are approximate due to rush hour traffic.

7. The shuttle drivers will drop you off and pick you up at the same location.

8. The shuttle drivers will give you their cell phone numbers and they are very helpful.

9. If you take a shuttle and decide to take an alternative form of transportation back to the hotel, please call your shuttle driver to let them know. I’m told they are concerned about getting you where you need to go!

10. The shuttles will make continuous loops each evening with the last pick up being 10:00pm. If you are going to be later, you must arrange your own transportation back to the hotel.
Shuttle Schedule

To & From the InterContinental Suites Hotel & The InterContinental Conference Hotel

REGISTRATION

Tuesday Evening October 20th (6:30pm-8:00pm: 3rd Floor Registration Area IC Conference Center)

Shuttle Loops 6:15pm – 8:15pm

Wednesday, October 21st

Morning: 6:45am - 7:30am

Afternoon 4:15pm - 4:45pm

Thursday, October 22nd

Morning: 6:45am - 7:30am

Afternoon 4:15pm - 4:45pm

Friday, October 24th

Morning: 6:45am - 7:30am

Last day of conference: Please bring your luggage to the IC Conference Center and the bellmen can hold them for you.

(Note: If you are not leaving on Friday, please don’t bring your luggage to the IC Conference Center.)
<table>
<thead>
<tr>
<th>Shuttle Schedule Wednesday, October 21st 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>LITTLE ITALY/LEGACY VILLAGE/BEACHWOOD PLACE</strong></td>
</tr>
<tr>
<td>5:00pm departure</td>
</tr>
<tr>
<td>5:15pm arrive at Little Italy</td>
</tr>
<tr>
<td>5:45pm arrive at Legacy Village</td>
</tr>
<tr>
<td>5:55pm arrive at Beachwood Mall</td>
</tr>
<tr>
<td>6:40pm departure</td>
</tr>
<tr>
<td>6:55pm arrive at Little Italy</td>
</tr>
<tr>
<td>7:25pm arrive at Legacy Village</td>
</tr>
<tr>
<td>7:35pm arrive at Beachwood Mall</td>
</tr>
<tr>
<td><strong>EAST 4TH/HORSESHOE CASINO/TOWER CITY CINEMAS</strong></td>
</tr>
<tr>
<td>5:00pm departure</td>
</tr>
<tr>
<td>5:15pm arrive at East 4th</td>
</tr>
<tr>
<td>5:30pm arrive at Horseshoe Casino</td>
</tr>
<tr>
<td>5:45pm arrive at Tower City Cinemas</td>
</tr>
<tr>
<td>6:15pm departure</td>
</tr>
<tr>
<td>6:30pm arrive at East 4th</td>
</tr>
<tr>
<td>6:45pm arrive at Horseshoe Casino</td>
</tr>
<tr>
<td>7:00pm arrive at Tower City Cinemas</td>
</tr>
<tr>
<td><strong>WEST 6TH/ROCK &amp; ROLL HALL OF FAME</strong></td>
</tr>
<tr>
<td>5:00pm departure</td>
</tr>
<tr>
<td>5:30pm arrive at Rock &amp; Roll Hall of Fame</td>
</tr>
<tr>
<td>5:40pm arrive at West 6th</td>
</tr>
<tr>
<td>6:15pm departure</td>
</tr>
<tr>
<td>6:40pm arrive at Rock &amp; Roll Hall of Fame</td>
</tr>
<tr>
<td>6:50pm arrive at West 6th</td>
</tr>
</tbody>
</table>
## Shuttle Schedule Thursday, October 22nd 2015

<table>
<thead>
<tr>
<th>LITTLE ITALY/LEGACY VILLAGE/BEACHWOOD PLACE</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>5:30pm departure</td>
<td></td>
</tr>
<tr>
<td>5:45pm</td>
<td>arrive at Little Italy</td>
</tr>
<tr>
<td>6:15pm</td>
<td>arrive at Legacy Village</td>
</tr>
<tr>
<td>6:25pm</td>
<td>arrive at Beachwood Place</td>
</tr>
<tr>
<td>7:10pm departure</td>
<td></td>
</tr>
<tr>
<td>7:25pm</td>
<td>arrive at Little Italy</td>
</tr>
<tr>
<td>7:55pm</td>
<td>arrive at Legacy Village</td>
</tr>
<tr>
<td>8:05pm</td>
<td>arrive at Beachwood Place</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>EAST 4TH/HORSESHOE CASINO/TOWER CITY CINEMAS/WEST 6TH</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>5:30pm departure</td>
<td></td>
</tr>
<tr>
<td>5:45pm</td>
<td>arrive at East 4&lt;sup&gt;th&lt;/sup&gt;</td>
</tr>
<tr>
<td>6:00pm</td>
<td>arrive at Horseshoe Casino</td>
</tr>
<tr>
<td>6:15pm</td>
<td>arrive at Tower City Cinemas</td>
</tr>
<tr>
<td>6:30pm</td>
<td>arrive at West 6&lt;sup&gt;th&lt;/sup&gt;</td>
</tr>
<tr>
<td>6:45pm departure</td>
<td></td>
</tr>
<tr>
<td>7:00pm</td>
<td>arrive at East 4&lt;sup&gt;th&lt;/sup&gt;</td>
</tr>
<tr>
<td>7:15pm</td>
<td>arrive at Horseshoe Casino</td>
</tr>
<tr>
<td>7:30pm</td>
<td>arrive at Tower City Cinemas</td>
</tr>
<tr>
<td>7:45pm</td>
<td>arrive at West 6&lt;sup&gt;th&lt;/sup&gt;</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>HARD ROCK ROCKSINO NORTHFIELD PARK</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>5:30pm departure</td>
<td></td>
</tr>
<tr>
<td>6:15pm</td>
<td>arrive at Hard Rock Rocksino Northfield Park</td>
</tr>
<tr>
<td>10:00pm</td>
<td>LEAVE the Hard Rock Rocksino Northfield Park</td>
</tr>
</tbody>
</table>
**Fall 2015 COLLABORATIVE CLASS AGENDA - Six Continents Room**

This class is designed for administrators who have an advanced understanding of our software and use New Innovations confidently and on a regular basis. We will work together to share and discover best practices on oversight and go over new features. We’ll hold discussions on how you can best utilize the RMS to help you out.

**Supplies:** Bring a Laptop, Network Cord (Ethernet Cord) and Power Cord  
*(Subject to Change)*

<table>
<thead>
<tr>
<th>Wednesday</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>7:15-8:00</td>
<td>Breakfast</td>
<td></td>
</tr>
</tbody>
</table>
| 8:00-8:30     | Getting Plugged In & Introductions | • Connect your computer  
• Meet your fellow track attendees |
| 8:30-10:30    | Who needs the data and why? How do they get it? | Define the roles  
• GME  
• Program Director  
• Program Coordinator  
• Clinical Competency Committee (CCC)  
Group Discussion and Breakout |
| 10:30-10:45   | BREAK            |                  |
| 10:45-12:00   | Personnel Data and Scheduling | • Who needs this data and why?  
• How do they get the data?  
• Group Discussion and Breakout |
| 12:00pm-1:00pm| LUNCH            |                  |
| 1:00-3:00     | Evaluations      | • Who needs data and why?  
• How do they get the data?  
• Group Discussion and Breakout |
| 3:00-3:15     | BREAK            |                  |
| 3:15-4:30     | Duty Hours       | • Who needs data and why?  
• How do they get the data?  
• Group Discussion and Breakout |
<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:15-8:00</td>
<td>Breakfast</td>
<td></td>
</tr>
<tr>
<td>8:00-8:30</td>
<td>Getting Plugged In</td>
<td></td>
</tr>
<tr>
<td>8:30-10:00</td>
<td>Conferences</td>
<td>• Who needs this data and why? • How do they get the data? • Group Discussion and Breakout</td>
</tr>
<tr>
<td>10:00-10:15</td>
<td>BREAK</td>
<td></td>
</tr>
<tr>
<td>10:15-12:00</td>
<td>Logger</td>
<td>• Who needs the data and why? • How do they get this data? • Group Discussion and Breakout</td>
</tr>
<tr>
<td>12:00-1:00</td>
<td>LUNCH</td>
<td></td>
</tr>
<tr>
<td>1:00-2:00</td>
<td>Scholarly Activities</td>
<td>• Who needs this data and why? • How do they get the data? • Group Discussion and Breakout</td>
</tr>
<tr>
<td>2:00-3:30</td>
<td>NAS/CLER</td>
<td>• Who needs this data and why? • How do they get the data? • Group Discussion and Breakout</td>
</tr>
<tr>
<td>3:30-4:30</td>
<td>Linked NI</td>
<td>• Networking Event</td>
</tr>
<tr>
<td>Time</td>
<td>Activity</td>
<td>Details</td>
</tr>
<tr>
<td>--------------</td>
<td>-----------------------------------</td>
<td>----------------------------------------------</td>
</tr>
<tr>
<td>7:15-8:00</td>
<td>Breakfast</td>
<td></td>
</tr>
<tr>
<td>8:00-8:30</td>
<td>Getting Plugged In</td>
<td></td>
</tr>
<tr>
<td>8:30-10:15</td>
<td>Annual Program Evaluations (APE)</td>
<td>• Who needs this data and why?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• How do they get the data?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Group Discussion and Breakout</td>
</tr>
<tr>
<td>10:15-10:30</td>
<td>BREAK</td>
<td></td>
</tr>
<tr>
<td>10:30-11:00</td>
<td>Town Hall</td>
<td>• Time with Steve Reed, President of New</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Innovations</td>
</tr>
<tr>
<td>11:00-11:30</td>
<td>What 's Ahead</td>
<td>• Learn about new features to come</td>
</tr>
<tr>
<td>11:30-12:00</td>
<td>Closing Discussion</td>
<td>• What did you learn?</td>
</tr>
<tr>
<td>12:00-1:00</td>
<td>LUNCH</td>
<td></td>
</tr>
<tr>
<td>1:00-3:00</td>
<td>S.O.S/Free Work Time</td>
<td>• One on one assistance from your NI Trainers</td>
</tr>
</tbody>
</table>
Fundamental - Amphitheater A
Progressive - Amphitheater B
Collaborative - Six Continents
Breakfast & Lunch - Ballroom C
Day 1
We are going to use the following formula for our presentation about the nuts and bolts of data collection in New Innovations. First, who needs the data and what information is necessary? Then we’ll discuss how the data is retrieved.

<table>
<thead>
<tr>
<th>Who: Roles</th>
<th>Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>GME</td>
<td>Responsible for accreditation of all programs for one or more sponsors</td>
</tr>
<tr>
<td>Program Director</td>
<td>Responsible for accreditation of one program</td>
</tr>
<tr>
<td>Program Coordinator</td>
<td>Advocate for Program Director. Assists with all aspects of accreditation</td>
</tr>
<tr>
<td>Clinical Competency Committee (CCC)</td>
<td>Advises the Program Director regarding resident progress, including promotion, remediation and dismissal.</td>
</tr>
</tbody>
</table>

## PERSONNEL

<table>
<thead>
<tr>
<th>Who</th>
<th>What</th>
<th>How</th>
</tr>
</thead>
<tbody>
<tr>
<td>GME</td>
<td>Track ‘Year in Training’ for each resident/fellow</td>
<td>Resident Rosters Custom Reports GME Dashboards</td>
</tr>
<tr>
<td>Program Director</td>
<td>Maintain accurate and complete program trainee files in compliance with ACGME CPR</td>
<td>Program Personnel</td>
</tr>
<tr>
<td>Program Coordinator</td>
<td>Keep all pertinent information about residents</td>
<td>Resident Rosters Custom Reports Program Dashboards</td>
</tr>
<tr>
<td>CCC</td>
<td>Track ‘Year in Training’ for each resident and fellow</td>
<td>Milestone Reviews</td>
</tr>
</tbody>
</table>
Go to Personnel > Reports > Resident Roster

The report automatically displays all residents and fellows for the current academic year.

Click Filter in the upper left corner to show:
- Specific programs
- Academic years
- Groups of individuals
GME DASHBOARDS

Go to Administration > Dashboard > GME tab > Personnel and Residents Widgets

Drilling down (clicking) on either widget will display additional details.

PROGRAM PERSONNEL

Go to Administration > Program > Personnel > Trainees
The sponsoring institution must ensure the availability of schedules that inform all members of the health care team of attending physicians and residents currently responsible for each patient’s care.

<table>
<thead>
<tr>
<th>Who</th>
<th>What</th>
<th>How</th>
</tr>
</thead>
<tbody>
<tr>
<td>GME</td>
<td>Make sure information is entered for IRIS</td>
<td>GME Dashboard</td>
</tr>
<tr>
<td>Program Director</td>
<td>Ensure that each resident has the required experiences / rotations and is evaluated on each.</td>
<td>Program Directors cannot view any scheduling information (except their own schedule) unless they have level 4 or 5 in the Block Schedule module.</td>
</tr>
<tr>
<td>Program Coordinator</td>
<td>Make sure information is entered for IRIS</td>
<td>Gap Locator</td>
</tr>
<tr>
<td>CCC</td>
<td>Ensure that each resident has the required experiences/rotations and is evaluated on each.</td>
<td>View evaluations for each rotation</td>
</tr>
</tbody>
</table>

**GME DASHBOARDS**

Go to Administration > Dashboard > Scheduling Widget

Drilling down (clicking) on any widget will display additional details
**GAP LOCATOR**

*Go to Schedules > IRIS Tools > Gap Locator*

Set date range and use filters as desired.

### Block Scheduling Tools

<table>
<thead>
<tr>
<th>Resident</th>
<th>Program</th>
<th>Status</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alancanta, Mani</td>
<td>Family Medicine</td>
<td>PRG 1</td>
<td>10/1/2014</td>
<td>6/30/2015</td>
</tr>
<tr>
<td>Allen, Marcy</td>
<td>Surgery</td>
<td>PRG 2</td>
<td>7/1/2014</td>
<td>9/30/2014</td>
</tr>
<tr>
<td>Andrews, Charles R</td>
<td>Pediatrics</td>
<td>PRG 3</td>
<td>10/1/2014</td>
<td>6/30/2015</td>
</tr>
<tr>
<td>Antonio, Albert</td>
<td>Neonatal</td>
<td>FEL 1</td>
<td>7/1/2014</td>
<td>6/30/2015</td>
</tr>
<tr>
<td>Arora, Rosie J</td>
<td>Internal Medicine</td>
<td>PRG 2</td>
<td>7/1/2014</td>
<td>6/30/2015</td>
</tr>
<tr>
<td>Arthur, David</td>
<td>Pediatrics</td>
<td>PRG 3</td>
<td>7/1/2014</td>
<td>6/30/2015</td>
</tr>
<tr>
<td>Azusakam, Akira</td>
<td>Emergency Medicine</td>
<td>PRG 3</td>
<td>4/1/2015</td>
<td>6/30/2015</td>
</tr>
<tr>
<td>Baggett, Emily J</td>
<td>Family Medicine</td>
<td>PRG 2</td>
<td>9/1/2014</td>
<td>10/31/2014</td>
</tr>
<tr>
<td>Baggett, Emily J</td>
<td>Family Medicine</td>
<td>PRG 2</td>
<td>12/1/2014</td>
<td>6/30/2015</td>
</tr>
<tr>
<td>Barjou, Bhaskar</td>
<td>Endocrinology</td>
<td>FEL 2</td>
<td>7/1/2014</td>
<td>6/30/2015</td>
</tr>
<tr>
<td>Beale, Dawn</td>
<td>Emergency Medicine</td>
<td>PRG 1</td>
<td>11/1/2014</td>
<td>6/30/2015</td>
</tr>
<tr>
<td>Barutto, Michael</td>
<td>Emergency Medicine</td>
<td>PRG 4</td>
<td>9/1/2014</td>
<td>6/30/2015</td>
</tr>
</tbody>
</table>
## EVALUATIONS

<table>
<thead>
<tr>
<th>Who</th>
<th>What</th>
<th>How</th>
</tr>
</thead>
<tbody>
<tr>
<td>GME</td>
<td>Ensure all residents are being evaluated</td>
<td>GME Dashboard</td>
</tr>
<tr>
<td>Program Director</td>
<td>Oversee progress of trainees</td>
<td>How the CCC does its work can be decided by the Program Director</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Subcommittees</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Assigning residents to faculty members for pre-review</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Pre-review work will vary</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Scheduling and frequency of meetings</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Review Program Evaluations for strengths and weaknesses and make</td>
</tr>
<tr>
<td></td>
<td></td>
<td>adjustments</td>
</tr>
<tr>
<td>Program Coordinator</td>
<td>Distribute evaluations</td>
<td><strong>Evaluations &gt; Questionnaires</strong></td>
</tr>
<tr>
<td></td>
<td>• Develop evaluation forms for PDs to approve</td>
<td><strong>Evaluations &gt; Sessions &gt; New</strong></td>
</tr>
<tr>
<td></td>
<td>• Schedule semi-annual evaluations</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Schedule Evaluation of Program</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Ensure summative evaluations completed and filed</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Construct new milestone evaluations</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Review evaluation completion data</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Aggregating data for the CCC from multiple sources and forms</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Report milestone data to ACGME</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>CCC Milestone Reviews</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>ADS</strong></td>
</tr>
<tr>
<td>CCC</td>
<td>V.A.1.b).(1).(a) review all resident evaluations semi-annually; (Core)</td>
<td><strong>CCC Milestone Reviews</strong></td>
</tr>
<tr>
<td></td>
<td>V.A.1.b).(1).(b) prepare and assure the reporting of Milestones</td>
<td></td>
</tr>
<tr>
<td></td>
<td>evaluations of each resident semi-annually to ACGME; and, (Core)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>V.A.1.b).(1).(c) advise the program director regarding resident</td>
<td></td>
</tr>
<tr>
<td></td>
<td>progress, including promotion, remediation, and dismissal.(Detail)</td>
<td></td>
</tr>
</tbody>
</table>
## CCC MILESTONE REVIEWS

*Go to Portfolio > Milestones*

Select any subcompetency for any trainee

![Milestone Review Interface](image)

### DUTY HOURS

<table>
<thead>
<tr>
<th>Who</th>
<th>What</th>
<th>How</th>
</tr>
</thead>
<tbody>
<tr>
<td>GME</td>
<td>Ensure compliance / no violations</td>
<td>GME / Program Dashboards Compliance Report</td>
</tr>
<tr>
<td>Program Director</td>
<td>Ensure compliance / no violations</td>
<td>Violation / Justification Notifications</td>
</tr>
<tr>
<td></td>
<td>Approve / Decline Justifications</td>
<td></td>
</tr>
<tr>
<td>Program Coordinator</td>
<td>Ensure compliance / no violations</td>
<td>Violation Notifications Compliance Report Program Dashboard</td>
</tr>
<tr>
<td>CCC</td>
<td>Ensure compliance / no violations</td>
<td>Portfolio Review</td>
</tr>
</tbody>
</table>
GME DASHBOARDS

Go to Administration > Dashboard > Duty Hours Widget

Click on any widget to display additional details.

COMPLIANCE REPORT

Go to Duty Hours > Compliance

Use the filters to generate a report showing any violations and statistics for each rule checking period.
Day 2
## CONFERENCES

<table>
<thead>
<tr>
<th>Who</th>
<th>What</th>
<th>How</th>
</tr>
</thead>
<tbody>
<tr>
<td>GME</td>
<td>Oversee and ensure the quality of didactic and clinical education in all sites; Verify resident attendance at conferences</td>
<td>Program Dashboard</td>
</tr>
<tr>
<td>Program Director</td>
<td>II.A.4.a) oversee and ensure the quality of didactic and clinical education in all sites that participate in the program; Verify resident attendance at conferences</td>
<td>Conference Module</td>
</tr>
<tr>
<td>Program Coordinator</td>
<td>Oversee and ensure the quality of didactic and clinical education Verify resident attendance at conferences</td>
<td>Conference Module</td>
</tr>
<tr>
<td>CCC</td>
<td>Oversee and ensure the quality of didactic and clinical education Verify resident attendance at conferences</td>
<td>Portfolio Review</td>
</tr>
</tbody>
</table>

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**GME DASHBOARDS**

*Go to Administration > Dashboard > Conferences Widget*

Click on either widget to display additional details.
### Conference Module

**Go to Conferences > Calendar**

<table>
<thead>
<tr>
<th>Sun</th>
<th>Mon</th>
<th>Tue</th>
<th>Wed</th>
<th>Thu</th>
<th>Fri</th>
<th>Sat</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mar 5</td>
<td></td>
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<td>2</td>
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<td>15</td>
<td>16</td>
<td>17</td>
<td>18</td>
<td>19</td>
<td>20</td>
<td>21</td>
</tr>
</tbody>
</table>

- **Mar 5, 8:00a-9:00a**: Journal Club
- **Mar 5, 1:00p-2:00p**: M & M Conference
- **Mar 5, 3:30p-4:30p**: Grand Rounds (Rm Lecture hall A @ University Hospital)
- **Mar 9, 8:00a-9:00a**: Journal Club
- **Mar 9, 12:00p-1:00p**: M & M Conference
- **Mar 9, 3:30p-4:30p**: Grand Rounds (Rm Lecture hall A @ University Hospital)
- **Mar 15, 8:00a-9:00a**: Journal Club
- **Mar 15, 12:00p-1:00p**: M & M Conference
- **Mar 15, 3:30p-4:30p**: Grand Rounds (Rm Lecture hall A @ University Hospital)
Privileging is the process whereby a specific scope and content of patient care services (that is clinical privileges) are authorized for a healthcare practitioner by a health care organization, based on an evaluation of the individual’s credentials and performance. A ‘privilege’ is defined as an advantage, right, or benefit that is not available to everyone; the rights and advantages enjoyed by a relatively small group of people, usually as a result of education and experience.

1. Define the scope of the care your organization is providing.
2. Identify which practitioners are considered licensed independent practitioners (LIP), who will then be required to be credentialed and/or privileged. Check your individual state law and regulations – your state ‘practice act’ defines if the license allows the profession to ‘practice independently’ or ‘may practice with supervision.’
3. Identify the scope of practice for each type of licensed independent practitioner in accordance with your law and regulation. Scope is the term for the task/privilege the LIP will be providing to your patients.
4. Define the qualifications, (based on your scope of care, or the services you are providing) that the LIP must possess to be privileged to practice in your facility.

Simply said——what qualifications do you want the LIP to have in order to provide care in your organization?

For example:
- education, training and experience
- specialty areas of practice
- board certification, etc.

<table>
<thead>
<tr>
<th>Who</th>
<th>What</th>
<th>How</th>
</tr>
</thead>
<tbody>
<tr>
<td>GME</td>
<td>Privileging is the process whereby a specific scope and content of patient care services (that is clinical privileges) are authorized for a healthcare practitioner by a health care organization, based on an evaluation of the individual’s credentials and performance. A ‘privilege’ is defined as an advantage, right, or benefit that is not available to everyone; the rights and advantages enjoyed by a relatively small group of people, usually as a result of education and experience.</td>
<td>Procedure Logger Module</td>
</tr>
</tbody>
</table>

<p>| | | |
| | | |
| Procedure Logger Search | 25 | 25 |</p>
<table>
<thead>
<tr>
<th>Role</th>
<th>Role Description</th>
<th>Module</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Director</td>
<td>Define the qualifications (based on your scope of care, or the services you are providing) that the LIP must possess to be privileged to practice in your facility. Simply said—What qualifications do you want the LIP to have in order to provide care in your Program? For example: • education, training and experience • specialty areas of practice • board certification, etc.</td>
<td>Procedure Logger Module</td>
</tr>
<tr>
<td>Program Coordinator</td>
<td>Assist Program Director to configure Scope of Supervision and target numbers.</td>
<td>Procedure Logger Module</td>
</tr>
<tr>
<td>CCC</td>
<td>Assess progression toward privileging for each procedure.</td>
<td>Semi-Annual Review</td>
</tr>
</tbody>
</table>
**PROCEDURE LOGGER**

*Go to Logger > Setup > Lists and Fields*

Create Procedure and configure Scope of Supervision

![Procedure Configuration](image1)

*Go to Logger > Privileged Resident > Search*

A link to this report can also be placed on a user’s Home Page by giving them L1 privileges in Logger.

![Privilege Report](image2)
### SCHOLARLY ACTIVITIES

<table>
<thead>
<tr>
<th>Who</th>
<th>What</th>
<th>How</th>
</tr>
</thead>
<tbody>
<tr>
<td>GME</td>
<td>IV.B. Residents’ Scholarly Activities</td>
<td>GME Dashboard</td>
</tr>
</tbody>
</table>
|                | • IV.B.1. The curriculum must advance residents’ knowledge of the basic principles of research, including how research is conducted, evaluated, explained to patients, and applied to patient care.  
|                | • IV.B.2. Residents should participate in scholarly activity.  
|                | • IV.B.3. The sponsoring institution and program should allocate adequate educational resources to facilitate resident involvement in scholarly activities. |                             |
| Program Director| The program should allocate adequate educational resources to facilitate resident involvement in scholarly activities.          | Semi-Annual Review          |
| Program Coordinator | Assist Program Director to create forms to collect Scholarly Activity data                                                                 | Scholarly Activity Module   |
| CCC            | Assess progress in completing and documenting Scholarly Activities                                                                | Semi-Annual Review          |

---

**SCHOLARLY ACTIVITIES**

*Go to Administration > Dashboard > Portfolio Widget*

Click on any widget to display additional details.
### PORTFOLIO REVIEWS

<table>
<thead>
<tr>
<th>Who</th>
<th>What</th>
<th>How</th>
</tr>
</thead>
<tbody>
<tr>
<td>GME</td>
<td>Ensure that all residents are being reviewed semi-annually</td>
<td>CLER Dashboard</td>
</tr>
<tr>
<td>Program Director</td>
<td>Conduct a Semi-Annual Review of each resident</td>
<td>Create a review template to collect data from all modules of the database</td>
</tr>
<tr>
<td>Program Coordinator</td>
<td>Assist Program Director conduct a Semi-Annual Review of each resident</td>
<td>Create a review template to collect data from all modules of the database</td>
</tr>
<tr>
<td>CCC</td>
<td>Can access and review Semi-Annual Reviews during Milestone Review</td>
<td>Access from Milestone Review Form</td>
</tr>
</tbody>
</table>

**Semi-Annual Reviews**

Go to *Portfolio > Reviews*. Click **View** in front of a resident’s Semi-Annual Review.
Semi-Annual Reviews Accessible in Milestones

Go to Portfolio > Milestones > Click on any trainee

Click Open Semi-Annual Review in upper right corner.
<table>
<thead>
<tr>
<th>Who</th>
<th>What</th>
<th>How</th>
</tr>
</thead>
<tbody>
<tr>
<td>GME</td>
<td>CLER Visits every 18-24 months</td>
<td>CLER Dashboard</td>
</tr>
<tr>
<td>Program Director</td>
<td>Recognize how your program teaches and assesses resident performance in the six CLER focus areas.</td>
<td>CLER Dashboard Milestone Reviews</td>
</tr>
<tr>
<td>Program Coordinator</td>
<td>• Competencies with Milestones  &lt;br&gt; • Self-Studies at 8-10 year intervals  &lt;br&gt; • Detailed ADS Updates  &lt;br&gt; • Resident and Faculty Surveys</td>
<td>CLER Dashboard Milestone Reviews</td>
</tr>
<tr>
<td>CCC</td>
<td>• Identify how your program is teaching/assessing 6 focus areas above  &lt;br&gt; • Consider what the institution provides regarding the 6 areas  &lt;br&gt; • Understand what being a core faculty member means</td>
<td>Milestone Reviews</td>
</tr>
</tbody>
</table>

**NAS / CLER**

*Go to Administration > Program > CLER Visit*

Click on any widget to display additional details.
Go to Portfolio > Milestones

Select any subcompetency for any trainee.
Day 3
# APE – Annual Program Evaluation

<table>
<thead>
<tr>
<th>Who</th>
<th>What</th>
<th>How</th>
</tr>
</thead>
<tbody>
<tr>
<td>GME</td>
<td>Gather information about the status of all programs</td>
<td>Create and distribute a form</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Review and generate reports</td>
</tr>
<tr>
<td>Program Director</td>
<td>V.C.1. The program director must appoint the Program Evaluation Committee</td>
<td>Program Director completes the form</td>
</tr>
<tr>
<td></td>
<td>The PEC or the program director may carry out the improvement plans</td>
<td></td>
</tr>
<tr>
<td>Program Coordinator</td>
<td>Complete online APE form</td>
<td>Program Coordinator to assist with</td>
</tr>
<tr>
<td></td>
<td></td>
<td>completion of form</td>
</tr>
<tr>
<td>CCC</td>
<td>Most members are on PEC</td>
<td>Periodic PEC meetings</td>
</tr>
<tr>
<td></td>
<td>Help develop action plans for</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Citations and Concerns</td>
<td></td>
</tr>
</tbody>
</table>

**APE**

*Go to Administration > Sponsor > APE > Overview*
Go to Administration > Sponsor > APE > Responses
UNDERSTANDING MILESTONE REVIEWS

The Next Accreditation System is the ACGME’s process put in place to ensure the quality and safety of the allopathic residency learning environment and to make sure residents are competent when they complete their training. There are two parts to the Next Accreditation System: Safe and Effective Learning Environments and Educational Outcomes. The ACGME will monitor the Educational Outcomes through Semi-Annual Reviews and Milestone Reviews. See the documentation for Portfolio Reviews for more information about the Semi-Annual Reviews.

Milestone Reviews are to be conducted on each resident every six months by the Clinical Competency Committee (CCC). The Next Accreditation System specifies that programs should form a Clinical Competency Committee who will meet every six months to review each resident’s performance and rate their level of competency on the program’s subcompetencies.

CREATE A CLINICAL COMPETENCY COMMITTEE

Members of the Clinical Competency Committee (CCC) are those physicians who will complete the Milestone Review forms on the active residents and fellows. Each program will need to identify in the software those individuals who will be on this committee. This action will make the Milestone Reviews available to those members. If you designate a person from outside your department to be on your CCC, the person’s privilege level in their Personnel record will also need to be adjusted to include a Level 2 or Level 4 in the Portfolio module for your department.

Advisors are automatically given ‘View Only’ access to the Milestone Reviews of their advisees. If you want the Advisors to have full access to the Milestone Reviews, be sure to add them to the Clinical Competency Committee.

1. Go to Administration > Program
2. Click Personnel in the left panel
3. Click the Faculty tab
4. Click Add Faculty
5. Select a faculty member who is on the Clinical Competency Committee
6. Enter their **Appointment Date** (This date also determines longevity for your faculty members for the Attrition graph on the NAS Key Metrics page.)
7. Check the box for **Core Faculty**
8. Check the box for **Serves on the Clinical Competency Committee (CCC)**
9. Click **Add Faculty**
10. Continue to build your list of faculty members, designating their appointment date and whether they are Core Faculty or a member of the CCC.
To access the CCC Milestone Review, go to Portfolio > Milestones

This screen allows the Program Director and the CCC to view on a global level the performance levels of their residents on Milestone Reviews. The Peer Averages chart displays the average scores of residents on the current Milestone Reviews. Below the graph, all residents are listed, grouped by Year in Training, along with their current subcompetency scores. The software always defaults to the Current Reviews. Click Archives in the left panel to access data from past Milestone Review periods. More details are given about this Program overview page below.

### Peer Averages

The top section of the CCC Milestone Review displays the average Milestone scores of all your residents from their Milestone Reviews. At a glance, the Program Director and CCC can track the overall progress of all residents in their program. For example, from this program overview you can find out where your first years are possibly falling behind or where a significant gap in learning exists for a particular subcompetency for all levels within your program.

The CCC Program Overview results are displayed in two formats: Radar Chart and Area Graph. Both are described in more detail below.

### Radar Chart

The Radar Chart displays the average scores given to your residents on their Milestone Reviews.

- Each of the subcompetencies is represented by a spoke on the graph. The scores of 0 to 5 are shown by the concentric rings.
- The Milestone Review scores are grouped together by Year in Training. The inner circle usually represents the first year residents, followed by the scores for the 2nd year, 3rd years, etc.
- Hover over any line to view the specific average for a specific subcompetency.
Click the Area Chart button. This screen displays these same average scores for each Year in Training, but they appear horizontally on the chart.

- Subcompetencies are listed at the bottom of the graph. The scores, 0 to 5, are shown on the side as the vertical scale.
- Average scores from Milestone Reviews are displayed:
  - First Year in Training - Blue
  - Second Year in Training - Turquoise
  - Third Year in Training - Green
  - Fourth Year in Training - Yellow
  - Fifth Year in Training - Orange
- Hover over any subcompetency to view the actual average scores for each group

Below the graphs, all of your residents are listed and grouped by Year in Residency. You can:

- View their name, picture and status type
- View, at a glance, all of the residents' subcompetency scores on the current Milestone Review.
- Edit the scores. Click the arrow for any subcompetency and select the score from the dropdown list. For programs with special selections, such as 'Not Yet Rotated' or 'Not Yet Assessable,' the text will be the first entry on the dropdown list.
- View which Milestone Reviews have been marked as 'Completed.' Reviews marked as 'Completed' are greyed out and cannot be edited.
- Click Archives in the left panel to view past Milestone Reviews.

Residents must have a Training Record in their Personnel file for Milestone Reviews to appear.
### 1st Year in Residency

<table>
<thead>
<tr>
<th></th>
<th>PC 1</th>
<th>PC 2</th>
<th>PC 3</th>
<th>PC 4</th>
<th>PC 5</th>
<th>MK 1</th>
<th>MK 2</th>
</tr>
</thead>
<tbody>
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<td>PRO 3</td>
<td>PRO 4</td>
<td>ICS 1</td>
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<tr>
<td>PBE 1</td>
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<td>2.5</td>
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<td>3.0</td>
<td>2.0</td>
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<th></th>
<th>PC 1</th>
<th>PC 2</th>
<th>PC 3</th>
<th>PC 4</th>
<th>PC 5</th>
<th>MK 1</th>
<th>MK 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lord, Norman</td>
<td>1.5</td>
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<tr>
<td>PRG 1</td>
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<td>PRO 3</td>
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<th>PC 3</th>
<th>PC 4</th>
<th>PC 5</th>
<th>MK 1</th>
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<tr>
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|        | ICS 3 | 3.0   |       |       |
|        |       |       |       |       |       |

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COMPLETED
RESIDENT’S MILESTONE REVIEW

Click on a resident to view details of their Milestone Review on a more granular level. There are four tabs to help you dig deeper into each resident’s Milestone Review: Milestones, Resident Review, Attachments and Meeting Notes. Each will be discussed below.

MILESTONES TAB

On the Milestones tab, each subcompetency is displayed allowing the CCC to view and score the resident’s level of competency.

- **Score** - Select one of the radio buttons at the bottom of the Dreyfus box. Continue to scroll down the page to view and score each subcompetency. Selections are automatically saved. To deselect a score, click again.
- **Flag** - Click the Flag on a specific milestone to show that milestone narrative is an area of concern and ‘Requires Attention.’ The milestone will be highlighted in yellow. Click again to remove the flag.

To the right of each subcompetency, a panel displays a summary of the resident’s evaluation results that have been mapped to this subcompetency:

- **Line Graph** - Displays the results of evaluations completed on the resident over the last 6 months that have been linked to this subcompetency.
  - Dark Blue Line – Shows the average evaluation score for each month
  - Light Blue Line – Shows the average evaluation score of her peer group, those in their first Year in Training
  - Hover over the graph to see the number of responses received and the average for that month.
• Row of Scores:
  • AVG - Shows the resident’s overall average from evaluations for this six month period for questions linked the subcompetency. See the ‘Note about Normalized Scores’ section.
  • PEER - Displays the overall peer average from evaluation results linked to the subcompetency for all residents in the same Year in Residency for this six month period.
  • PRIOR - Shows the score that this resident received on her prior Milestone Review for PC1.

No Data

Occasionally a subcompetency panel will display the message shown here. For the resident's average and the peer average to appear, there must be at least one evaluation completed and the results mapped to this subcompetency. There must be at least two evaluation results in different months, plus appropriate mapping, to create the line graph.

MORE DETAILS

To view more details regarding the evaluation results, click View Details. The screen will refresh showing the subcompetency and the evaluation information, plus more detailed information:

• Notes
  o Click New Note to add a note about this subcompetency
  o Notes from previous Milestone Reviews will be displayed
  o Residents can NOT see these notes
• Bar Graph Icon
  o A small bar graph icon placed beside a milestone narrative designates that there are evaluation results from Milestone narratives placed directly on your questionnaire or through the use of Shift Cards
  o See more details in the ‘Results from Milestone Questions’ section
EVALUATION RESULTS

In the section below the Dreyfus scale, you can view the results of individual evaluation questions completed on this resident from the past six months that were mapped to this subcompetency. There are four tabs: Comments, Evaluators, Questions and Rotations. The same evaluation data is presented under the Evaluators, Questions and Rotations tabs, but organized into different formats for your use. Residents can NOT view any evaluation comments or results.

Comments Tab

- Displays comments specifically linked to this subcompetency
- Click General Comments to view the overall general comments made by evaluators
- If the Comments tab does not appear, no comments were made on evaluation questions mapped to this subcompetency

![Image of Comments Tab]

**Benson, Wayne (Faculty)**
Excellent with patient and family.
7/31/2014  JGB: Ambulatory

**General Comments**

**Benson, Wayne (Faculty)**
Excellent first year resident!
7/31/2014  JGB: Ambulatory

**Bradshaw, David (Faculty)**
Outstanding resident!
10/31/2014  JGB: EM
Evaluators Tab

- View a list of evaluators, the number of times they responded and the average score they gave this resident on questions linked to this subcompetency.
- Click on an evaluator to view the individual scores given by that evaluator.
- If the question was an actual subcompetency placed on the evaluation (by either direct placement or rotation-based), you’ll see the comments, the end date of the match, the rotation name and the score given.
- If the question was an EPA or Custom Subcompetency was mapped to this subcompetency, you’ll see the comments, the end date of the match, the rotation and the score given. You’ll also see a small ‘i’ (for Information) to the right of the score. Hover over the ‘i’ to see the original question text, the grade scale and the actual score the faculty member selected.
Questions Tab

- View a list of questions linked to this subcompetency that were used to evaluate the resident, along with the following:
  - Type of question that appeared on the evaluation: EPA (Entrustable Professional Activity), Subcompetency (PC1, MK3), Custom Subcompetency or Questions (in your own words).
  - Text of the question
  - Average score (See note below for Normalized scores)
  - Number of responses

- Click a question to view the evaluators, plus the scores and comments given by them

Note about Normalized Scores:

Questions in your own words can have a variety of grade scales, such as 1 - 3, 1 - 5 and 1 - 9. To help facilitate the CCC Review process, we normalize the evaluation results from these different grade scales to a 1 - 5 scale. This allows the CCC to easily compare the evaluation results from your faculty members with the 1 - 5 scale used on milestones. The same normalization process is also used for those specialties that have a 0 - 4 grade scale.
The evaluation results from questions (in your own words) mapped to a subcompetency are normalized using the following formula:

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

Where:

- \( m \) - Minimum value on the milestone scale (Example: 0 or 1)
- \( M \) - Maximum value on the milestone scale (Example: 4 or 5)
- \( p \) - Rating position or value of the selected radio button
- \( n \) - Number of bullet points on your grade scale

These normalized scores are then combined with scores from EPAs, subcompetencies, and custom subcompetencies to give an average evaluation score from questions mapped to a specific subcompetency. Questions in your own words that use a Boolean grade scale (Yes/No) will not be averaged in with the other types of questions.

By default, this process will be turned 'On.' If you do not want the evaluation results from your questions to be normalized and averaged, follow these steps:

- Go to Portfolio > Milestones
- In the left panel, click Settings
- Click Assessment Settings
- Uncheck the box for 'Normalize and average evaluation responses'
- Click Save

This setting affects the results in both Portfolio Milestones and Evaluation Reports for all residents.

**Note about Boolean Grade Scales**

Questions that have a Boolean grade scale (Yes/No, True/False) will display the percentage of affirmative responses the resident received on this question. This question is NOT included in the overall average for the resident on this subcompetency.
Note about 'Has not achieved Level 1'

For those subspecialties that have a 'Has not achieved Level 1' option in their Dreyfus scale, these responses can be counted as 'zero' and included in the resident's average and the Peer Average. Go to Settings > Assessment Settings and check the box to 'Factor "Has not achieved Level 1" as zero when averaging.' By default, the setting does not include this answer in averages.

Rotations Tab

- View the evaluation results grouped by the resident's Rotations
- Rotation name
- Date range of the rotation
- Average score
- Number of responses
- Click the rotation name to view the individual evaluators and the scores they gave the resident
Results from Milestone Questions

If your questionnaires included the actual Milestone narratives as questions, a small Bar Graph icon will appear on that Milestone panel indicating that there is data collected about that Milestone. Keep in mind that all Milestone questions have a grade scale composed of Yes, No and N/A.

- Click the Milestone panel that has a Bar Graph icon. The right column will now display the details about the data collected about that particular milestone narrative.
- The Line Graph displays the number of Yes responses (Green Line) and No responses (Red Line) received during each month. Hover over a dot on the Line Graph to see the actual number of responses.
- The 'Affirmed' box shows the percentage of Yes responses the resident received on that Milestone question. In the sample shown below, 86% of the evaluators responded, 'Yes, she is competent on this specific Milestone.'
- The 'Responses' box indicates how many responses were received on that Milestone, along with the number of Evaluators who submitted responses. In the example shown below, there are 7 responses from 3 evaluators. Click on an evaluator to view their responses.
- The 'Prior Review' box displays the score given to the resident on this subcompetency in the prior review.
- Below the Dreyfus scale:
  - Click Comments to view a list of comments made by evaluators about this milestone
  - Click Evaluators to view a list of people who responded to this question. Click on a name to see more details.
  - Click Questions to view the milestone questions. Click on a question to see more details.
  - Click Rotations to view the rotation list. Click on a rotation to see more details.
- Click the Bar Graph in the column header to view the results from all milestones in that level.
- Click the Bar Graph that appears after the subcompetency text to return to the results about the entire subcompetency.

To exit the Details page, click View Summary above the subcompetency.
At the top of the page, click the **Resident Review** tab. This screen displays a radar graph of the resident’s current milestone scores, plus scores from the two previous Milestone Reviews.

- Check the box for **Include peer averages** to view the Peer Averages for the current time period. The Peer Average appears in the shaded area of the graph. This box will appear on this screen for administrators and CCC, even if the Peer Averages have been turned ‘Off’ for the residents.
- Below the radar graph is a list of the subcompetencies and the score given for each subcompetency.
- Click on a subcompetency to view a graph showing the scoring trend on Milestone Reviews for this subcompetency, along with the Dreyfus model showing the milestone narratives.
- Click **Expand All** to open all subcompetencies.
- Click **Print** to print the radar graph and the list of scores and subcompetencies.
- Select another resident from the list in the left panel to continue viewing Resident Reviews.
Gathers and synthesizes essential and accurate information to define each patient's clinical problem(s). (PC1)

Critical Deficiencies

- Does not collect accurate historical data
- Inconsistently able to acquire accurate historical information in an organized fashion
- Does not use physical exam to confirm history
- Does not perform an appropriately thorough physical exam or missing key physical exam findings
- Fails exclusively on documentation of others to generate own database or differential diagnosis
- Fails to recognize patient's central clinical problems
- Inconsistently recognizes patient's central clinical problem or develops unlimited differential diagnoses
- Fails to recognize potentially life-threatening problems

Ready for unsupervised practice

- Consistently acquires accurate and relevant histories from patients
- Seeks and obtains data from secondary sources when needed
- Consistently performs accurate and approximately thorough physical exams
- Uses collected data to define a patient's central clinical problem

Aspirational

- Acquires accurate histories from patients in an efficient, productive, and hypothesis-driven fashion
- Identifies relevant historical variables, including sensitive information that informs the differential diagnosis
- Synthesizes data to generate a prioritized differential diagnosis and problem list
- Effectively uses history and physical examination skills to minimize the need for further diagnostic testing
- Develops and achieves comprehensive management plan for each patient

Develops and achieves comprehensive management plan for each patient. (PC2)
ATTACHMENTS TAB

On the Attachments tab, view documents that have been uploaded to the resident’s Milestone Review for this review period. Click Select File to attach a new document. Residents will not be able to view the attachments. Attachments are limited to 12MB.

MEETING NOTES TAB

Notes can be added to the resident's Milestone Review. Residents will NOT be able to view the Meeting Notes.

- Click Add Comment to add the first comment.

- If a comment has been added, hover over the comment to:
  - Reply
  - Add a new comment
  - Delete the comment. Only the person who submitted the comment can delete the comment.
EXPLORE GENERAL FEATURES

PROGRAM SELECTION

Administrators who have access to more than one program can view the residents and milestones from another program by selecting the program from the dropdown list. There’s no need to log into another department/division.
CURRENT REVIEWS

Click the **Current Reviews** link to return to your current list of residents in the current review period. Residents must have a Training Record for their Milestone Review to appear in the list.

ARCHIVES

Click **Archives** to have access to Milestone Reviews from the past. Select a time period to view your residents' Milestone Reviews from that review period.
Click **Settings** to select the filters for your residents' evaluation data.

![Settings](image)

**DATES**

Choose the beginning date for the evaluation data to be presented. By default, beginning date of the current review period is selected.

- Select a date
- Click **Apply**

**QUESTIONNAIRES**

Choose which questionnaires you want to include in the evaluation data. By default, evaluation responses are included from all questionnaires.

- Click **Select** and highlight the questionnaire(s) from dropdown list
- Click **Apply**
EVALUATORS

Choose the evaluators you want to include in the evaluation feedback. By default, the evaluation data will include responses from all evaluators.

- Click **Faculty** to view just the responses from faculty members
- Click **Non-faculty** to view the responses from nurses, residents and other non-faculty personnel
- Click **Apply**

ASSESSMENT SETTINGS

The following options affect the evaluation results on both Milestone Reviews and Evaluation Reports:

- Normalize and average evaluation responses - By default, this process will be turned 'On.' If you do not want the evaluation results from your custom questions to be normalized and averaged, uncheck this box. See the section ‘Note about Normalized Scores’ for more details.

- Factor 'Has not achieved Level 1' as zero when averaging - For the subspecialties listed below, the Dreyfus scale includes an extra column for 'Has not achieved Level 1' or similar wording. By default, any responses entered in this column will not be counted in the Resident's personal average, nor in the program's Peer Average. Programs have the option to count these responses as 'zero' and include them in the averages. Check the box to count these responses as 'zero' in the averages.

- Allow residents to view peer averages - By default, this option will be turned 'Off.' If you want to allow your residents to view the peer averages for Milestone scores and evaluation results, check this box.

<table>
<thead>
<tr>
<th>ACGME Subspecialties</th>
<th>AOA Subspecialties</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anesthesiology - General</td>
<td>Anesthesiology - Acute &amp; Chronic Pain Mgmt</td>
</tr>
<tr>
<td>Anesthesiology - Pain Management</td>
<td>Dermatology - General</td>
</tr>
<tr>
<td>Dermatology - General</td>
<td>Dermatopathology</td>
</tr>
<tr>
<td>Emergency Medicine - General</td>
<td>Diagnostic Radiology - General</td>
</tr>
<tr>
<td>Family Medicine - General</td>
<td>Emergency Medicine - General</td>
</tr>
<tr>
<td>Ophthalmology - General</td>
<td>Family Medicine - General</td>
</tr>
<tr>
<td>Anatomic Pathology - General</td>
<td>Family Med &amp; Osteo Manipulative Treatment - General</td>
</tr>
<tr>
<td>Pathology, Clinical - General</td>
<td>Ophthalmology - General</td>
</tr>
<tr>
<td>Physical Medicine &amp; Rehabilitation - General</td>
<td>Anatomic Pathology - General</td>
</tr>
<tr>
<td>Psychiatry - General</td>
<td>Psychiatry - General</td>
</tr>
<tr>
<td>Diagnostic Radiology - General</td>
<td>Psychiatry - Addiction Psychiatry</td>
</tr>
<tr>
<td>Urology - General</td>
<td>Physical &amp; Rehabilitation Medicine - General</td>
</tr>
<tr>
<td>Urological Surgery - General</td>
<td>Pain Medicine - General</td>
</tr>
</tbody>
</table>
RESIDENT LIST

When viewing a resident's Milestone Review, use the left panel to:

- Navigate from one resident to another
- Determine the status of the Milestone Reviews based on the icons:
  - Pencil - In draft form
  - Checkmark - Marked as 'Completed'
  - Blank - Not yet started
ACCESS TO SEMI-ANNUAL REVIEWS

The resident's Semi-Annual Reviews are available to the Program Director and Administrator while completing the resident's Milestone Review. The Semi-Annual Review will open under a new tab, allowing the CCC to toggle between the Milestone Review and the Semi-Annual Review. If the dropdown list does not appear for your resident, then no Semi-Annual Reviews have been scheduled for that resident. If you want other members of the CCC to be able to view the Semi-Annual Reviews, give them a Level 4 privilege in Portfolio within their Personnel record.

At the top of the resident's Milestone Review:

- Click Open Semi-Annual Review
- Select the appropriate date range

OFF-CYCLE RESIDENTS

Some of your residents may be 'off-cycle,' meaning their advancement date may not be the same as your other residents. The Milestone Reviews will still be created for the 'off-cycle' resident for December and June to align with the ACGME reporting dates. The evaluation results will be automatically displayed for the last six months. To include evaluation results from a different time period, click Settings in the left panel, change the date and click Apply.

MARK AS COMPLETE

When all subcompetencies have been scored on a resident's Milestone Review and the Progress Bar shows '100% Complete,' it's best to mark the Milestone Review as 'Complete.' This locks the Milestone Review from being edited. After marking a Milestone Review as 'Complete:'

- Residents will be able to view their own Review
- Advisors will be able to see the Milestone Reviews of their advisees. (Advisors are designated in the resident’s Personnel record.)
To change the status of the Milestone Review from 'Draft' to 'Complete:'

- Click **Draft** and select **Complete**
- Click **Complete** and select **Draft** to reopen the Milestone Review for editing
FIVE TYPES OF EVALUATION QUESTIONS

We provide innovative ways to evaluate your residents and fellows throughout their training. Let's take a look at the five types of questions you can use on your resident evaluations. 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. Refer to Appendix 1 thru 5 for step-by-step instructions to configure your own evaluations using these five types of questions.

CUSTOM QUESTION

- **Description:** This is a question that you create in your own words, the kind of customized question you've 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:** Custom Question and Grade Scale in your own words:
- **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:**

![Sample EPA Question Image]
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:

![Sample Milestone Question](image-url)
• **Description:** Evaluate your residents by placing the ACGME published subcompetencies directly on your evaluation forms. This can be done in two ways.
  - **Manually-Added:** Place specific subcompetencies on your evaluation form. The resident is evaluated on that subcompetency regardless of the resident’s rotation.
  - **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:**

![Subcompetency Example](image-url)
CUSTOM SUBCOMPETENCY

- **Description:** We provide an empty Dreyfus box 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 Dreyfus box to create your own Custom Subcompetency:**

![Sample Dreyfus box to create your own Custom Subcompetency](image)
**COMBINED PROGRAMS**

Combined programs can evaluate their residents on the milestones from both core programs. In our example below we’ll use the combined program of Med/Peds (CMS Code 1450) where we will evaluate residents on both Internal Medicine milestones and Pediatric milestones. All combined programs would follow the same process.

**CONFIGURATION**

In the Administration module, a combined program must designate which core programs are connected to your combined program. It lets the software know which Milestone Reviews should be displayed for your residents. In our example of Med/Peds, the core programs would be Internal Medicine and Pediatrics.

1. Go to Administration > Program
2. Click Configuration
3. Select the core Internal Medicine Program and the core Pediatrics Program associated with your Med/Peds program
4. Click Save
COMPLETE A MILESTONE REVIEW – COMBINED PROGRAM

If you are logged into Med/Peds, you'll be able to select either the Internal Medicine review or the Pediatrics review to complete.

CONFIGURE EVALUATION FEEDBACK FOR CCC

There are many different administrative setups for Med/Peds programs and New Innovations can easily accommodate them. Some Med/Peds programs have their own Program Director and Clinical Competency Committee (CCC), while other Med/Peds programs are administered by the Program Directors and CCC from the Internal Medicine and Pediatrics programs. Evaluations on the Med/Peds residents can be distributed by Med/Peds, Internal Medicine or Pediatrics. We can help you provide evaluation feedback to your CCC, regardless of your administrative setup.

Below we've included instructions for configuring your Med/Peds program and also for creating evaluation feedback for your CCC.

Select the administrative setup below (A or B) that best matches the distribution of evaluations for your Med/Peds residents:
A. Evaluations for Med/Peds residents are distributed by Med/Peds

1. Evaluations include actual ACGME verbiage on questionnaires (Direct Milestones)
   - Evaluations are distributed by Med/Peds to IM and Peds faculty
   - Questionnaires will contain actual Milestone Language. Choose between Subcompetencies or Milestones.

2. Evaluations include your questions mapped to Subcompetencies or Categories (Indirect Milestones)
   - Evaluations are distributed by Med/Peds to IM and Peds faculty
   - Questionnaires will **not** contain actual Milestone Language
   - Questionnaires include your own questions that are mapped to Subcompetencies
B. Evaluations for Med/Peds residents are distributed by both Internal Medicine and Pediatrics

1. Evaluations include actual ACGME verbiage on questionnaires (Direct Milestones)
   - Evaluations are distributed:
     o Internal Medicine distributes evaluations to IM faculty
     o Pediatrics distributes evaluations to Peds faculty
   - Questionnaires will contain actual Milestone Language. Choose between Subcompetencies or Milestones.

2. Evaluations include your questions mapped to Subcompetencies or Categories (Indirect Milestones)
   - Evaluations are distributed:
     o Internal Medicine distributes evaluations to IM faculty
     o Pediatrics distributes evaluations to Peds faculty
   - Questionnaires will not contain actual Milestone language

For detailed instructions on how to do the actions mentioned, please see the Quick Start Guides in our Help section. Look in the Evaluations module for step-by-step instructions for providing evaluation feedback to your Clinical Competency Committee.
All residents have access to view their own Milestone Reviews. The Milestones Reviews must be marked 'Complete' before they are available to the residents. Residents cannot view their evaluation results, nor any notes made on the Milestone Reviews.

To view their Milestone Reviews, residents can:

- Go to Portfolio > My Milestones
- Click on a subcompetency below to expand and view the subcompetency text and a graphic representation of their Milestone scores
MILESTONE WIDGET ON PORTFOLIO REVIEWS

A Milestone widget is available on the Semi-Annual and Advisor Reviews in the Portfolio module. Please see the detailed instructions about Portfolio Reviews to add this widget to your reviews.

On a resident’s Portfolio Review, the Milestone widget will display the scores given to the resident by the CCC. The scores will show the resident’s progress over time for the length of the resident’s training period on the Milestone subcompetencies. Scores will be included from Milestone Reviews that are both in ‘Draft’ mode and from those marked as ‘Complete.’

ADS SUMMARY REPORT

Under the Next Accreditation System (NAS), the Accreditation Council for Graduate Medical Education (ACGME) requires that all accredited training programs enter Milestone scores for their residents into the ACGME’s web-based Accreditation Data System (ADS). This Milestone reporting must be done by December and June for each year of the resident’s training. At this time, the ADS site does not allow for electronic transfer of Milestone scores.

The CCC Milestone Review page displays your residents’ Milestone scores in the order they are published on the ACGME site. However, for some programs these published subcompetencies appear in a different order on the ADS site. Check the box for ADS Order and the screen will refresh putting the subcompetencies in the order they appear on your ADS site. This will allow for easier data entry of the Milestone scores.
Below is an example from Plastic Surgery.

- **Published Milestone Order:**

![Published Milestone Order Image]

- **ADS Order**

![ADS Order Image]
Enter Scores
1. Go to Portfolio > Milestones
2. Scroll down to find your resident
3. Transfer their scores to the ADS site

Past Reviews
1. Go to Portfolio > Milestones
2. Click Archives in the left panel
3. Select the correct review period
4. Scroll down to find your resident
5. Transfer the scores to the ADS site

Special N/A Options
Some programs have a special N/A option on their Milestone Reviews. We have included this N/A option on the Milestone Review forms. Some of the N/A options include the following:
- Not yet rotated
- Has not achieved Level 1
- Not yet assessable

Reporting Dates
For more information about reporting dates for each program, please refer to the ACGME website:

- Go to this site:
  http://www.acgme.org/acgmeweb/tabid/430/ProgramandInstitutionalAccreditation/NextAccreditationSystem/Milestones.aspx
- Then click Milestones by Reporting Date
ACCREDITATION DATA

Go to Administration > Program to view the graph for your program.

PROGRAM LEVEL

Milestones & Reviews – Two Panels

- Milestone Average Level of Competency Per Status

At the program level, graphs will be available to display the results of the completed milestone reviews. The spider graph below displays resident competency in the milestones by year in training. By default, only results from Milestone Reviews marked 'Complete' will be included. Uncheck the box labeled 'Only include reviews marked complete' to include results from Milestone Reviews still in draft mode.
- Residents being Reviewed

This panel shows how many residents have Milestone Reviews and Semi-Annual Reviews completed. The data is displayed for the current and previous 6 month periods.

When you click the ‘Residents being Reviewed’ panel, you can see more details including the names of the residents in the program and their review status. The green check mark indicates a milestone or semi-annual review has been completed.

<table>
<thead>
<tr>
<th>Residents being Reviewed</th>
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<tbody>
<tr>
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</tbody>
</table>

### GME LEVEL

At the GME level, administrators will be able to track how all of the programs are progressing on their Milestone Reviews and Semi-Annual Reviews. This report displays the percentage of residents in the accredited programs who have had a Milestone Review and a Semi-Annual Review completed.

1. Go to Administration > Sponsor
2. In the left panel, go to Program Oversight > Reviews.
EVALUATION REPORTS

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

- 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 evaluations completed on time (All Evaluators)
- Late - The number of evaluations completed past the due date (All Evaluators)
- NET - Number of evaluations 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 name to view the program’s data.

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’ll land on the Residents tab
3. By default, you’ll 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, or 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 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.
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 that were 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 late (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 that were completed on time (by 11:59 PM on the Due Date)
Calculations - The number of evaluations that were 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 late (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)

Calculations - The number of evaluations that were 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 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
  - 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 questions 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.

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

*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.
Notes:

- The normalizing process is turned ‘On’ by default. See General Features > Assessment Settings below to read more details about this process and to change the settings.
- For those subspecialties that have a ‘Has not achieved Level 1’ option in their Dreyfus scale, these responses can be counted as 'zero' and included in the resident's average and into the Peer Average. See General Features > Assessment Settings below to read more details about this process and to change the settings.
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
  - Name and Title of the questionnaire
  - Label - Describes what type of question it is: EPA, Milestone, Subcompetency, Custom Question (in your own words), Custom Subcompetency
  - Question - Shows the actual question text from the questionnaire.
  - 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 - Shows the highest score given to the resident.
- Standard Deviation - Displays the variation or dispersion of the results from the average score.

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.
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.
Notes:

- The normalizing process is turned ‘On’ by default. See General Features > Assessment Settings below to read more details about this process and to change the settings.

For those subspecialties that have a 'Has not achieved Level 1' option in their Dreyfus scale, these responses can be counted as 'zero' and included in the resident's average and into the Peer Average. See General Features > Assessment Settings below to read more details about this process and to change the settings.
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 one milestone.
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 and compared with Peer Average

Generate the Competency Report:
1. Go to Evaluations > Reports
2. Click a resident’s name
3. 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 and 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.
The Problems Report has two sections:

**Questions receiving low scores**
- Resident has a low score on a specific question on a questionnaire flagged to give Low Score notifications
- Resident has 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. Example: Poor, Excellent
- Value – Shows the value given to that score. Example: 1 – 5
- Peer Average – Displays the peer average for that question
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:

1. Go to Evaluations > Reports
2. Select a Resident
3. 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 that were 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 are late (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 that were completed on time (by midnight on the Due Date)
  - Calculations - The number of evaluations that were 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 late (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 that were 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

<table>
<thead>
<tr>
<th>Subject</th>
<th>Session</th>
<th>Rotation</th>
<th>Start</th>
<th>End</th>
<th>Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brooks, Maggie</td>
<td>Evaluated 55 times</td>
<td>Rotation Data</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Delinquent Evaluations</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Subject</td>
<td>Session</td>
<td>Rotation</td>
<td>Start</td>
<td>End</td>
<td>Due</td>
</tr>
</tbody>
</table>
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 twelve 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
4. Click Export to Excel to export the data to a spreadsheet format.

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.
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 in the Search Box 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 changes to the default settings. 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.
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 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:
   1. Click Select All or
   2. 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 when completed. Open the email and print the report.
ASSESSMENT SETTINGS

Click the Gear icon to configure the Assessment Settings. These settings affect both the Evaluation Reports and the evaluation results on Milestone Reviews. (These checkboxes are also available by going to Portfolio > Milestones > Settings > Assessment Settings.)
By default, the first box is checked and the other two are not checked. Check the box for each to enable the setting.

- **Normalize and average evaluation responses** - On the Subcompetency reports (Program level and individual reports), we ‘normalize’ the scores that your resident received. All Subcompetencies, EPAs and Custom Subcompetency questions have a 1 - 5 grade scale. However, custom questions (in your own words) may have different grade scales, such as 1 – 7 or 1 – 9. In order to include all scores in the Subcompetency average, we can 'normalize' the results from custom questions 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.

\[
\frac{m + \frac{(p - 1)(M - m)}{n - 1}}{n - 1}
\]
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.

- **Factor “Has not achieved Level 1” as zero when averaging** - Some specialties have an extra column on their Dreyfus scale for ‘Has Not Achieved Level One’ or similar wording. If you would like any evaluator responses from this column to be counted as ‘zero’ in the average scores, check this box. Not all programs will have this option.

- **Allow subjects to view peer average** – Programs can choose to allow their residents and faculty to view the Peer Average on the Summary Report and in the Milestone Reviews.

The example below displays the resident view of their evaluation results that includes a column for Peer Average. Check the box in the Assessment Settings to allow this column to appear for residents and faculty.
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.

- Click **Go to Legacy reports** in the top right corner to return to the Legacy (Original) Evaluation reports
- 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.

![Evaluation Reporting Table](image-url)
PROGRAM LEVEL FACULTY REPORTS

Click on a Program to view the data for that program. Click the Faculty tab. There are two program level reports available to view results for evaluations of faculty: Performance and Compliance.

The criteria that make someone show up in the Faculty list are:

1. The Faculty's demographics record is in the Program's Department.
2. The Faculty is the subject of a match in a session that is in the program's department and is for the report's date range.
3. The Faculty is the evaluator for a completed match in a session that is in the program's department and is for the report's date range.

PERFORMANCE REPORT

This screen displays 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

![Performance Report Example]

[Image of Performance Report example showing faculty names, number of evaluations, incomplete evaluations, and low scores]
The Compliance Report displays information for evaluations that were assigned to a faculty member 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. 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:

- Header: Number of times the faculty member was evaluated and the Rotation Data
- Question text
- Average score received for the question
- Peer average for the question
- Minimum score received
- Maximum score received
- Standard Deviation
- Comments

Generate the Summary Report:

1. Go to Evaluations > Reports
2. Select the Program
3. Click on the Faculty tab and select a faculty member
4. The screen defaults to the Summary tab
5. Click the box for Scoring Details to display a bar graph for each question
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

![Grading Profile Example](Image)
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
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

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
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'll 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'll 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 the current academic year.
The Summary Report shows the results from every question on every questionnaire that was used to evaluate the resident or 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'll 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.
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
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. Click the *Rotating Residents* tab
3. Click a resident's name
4. Click the *Problems* tab
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'll land 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
OTHER PERSONNEL REPORTS

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’ll 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

![Performance Report Screenshot](image-url)
1. Go to *Evaluations > Reports*
2. Click the *Other Personnel* tab
3. By default, you’ll 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.

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**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'll 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.
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 - Shows 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 - Shows 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’ll 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
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.

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

Generate the Exportable Data Report:
1. Go to Evaluations > Reports
2. By default, you’ll land on the Other Personnel tab
3. Click a person’s name
4. Click the Exportable Data tab
5. Click Excel to export the data to a spreadsheet style format
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. If you have access to more than one program, select a program from the dropdown list
3. Click the Rotations 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 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. If you have access to more than one program, select a program from the drop-down list
3. Click the *Rotations* tab
4. Click on the *Problems* tab
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

![Grading Profile Report Image]

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 their 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 a spreadsheet format.
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.
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 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
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 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.
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.
  
  o **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).
  
  o **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, 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 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.
This tab shows the actual scores given to the resident on each question. Click **Excel** to export this data to a spreadsheet format.
The supplemental materials supplied below are provided to help you setup your evaluation forms to give you the feedback needed on Evaluation Reports and on Milestone Reviews. The information below is organized to follow the Milestone setup page in the Evaluations module. Go to Evaluations > Milestones to see this screen.
APPENDIX 1 - EPAS

OVERVIEW

Entrustable Professional Activities (EPAs) are observable behaviors that help bridge the gap between the theoretical Milestone Reviews and daily clinical practice. Programs are using EPAs to create questions in their own words that describe the observable behaviors unique to their specialty. The EPA typically requires proficiency in numerous procedures or actions that can span several core competencies. An EPA uses an Entrustment Scale rather than a typical grade scale.

Each program can map the responses from their EPAs to the milestone subcompetencies and milestone narratives which are then made available on the Milestone Review for the CCC to use as supporting documentation for assessments.

You have the option to build a library of EPA questions and then add them to your questionnaire or you can type them into the system as you build your form.

BUILD A LIBRARY OF EPAS

Build a library of EPA questions and then add them to your questionnaire.

1. Go to Evaluations > Milestones
2. On the EPA panel, click Configure
3. Click Add New
4. Enter your EPA text
5. Click Add
6. The comment box and 'Did not observe' option will be automatically added to your EPA once it appears on a questionnaire
7. Continue adding EPA questions to your library
8. Click Actions and make a selection:
   a. Edit - To ensure the integrity of your data, once an EPA has been answered on a questionnaire, it cannot be edited.
   b. Copy
   c. Archive
   d. Delete - To ensure the integrity of your data, once an EPA has been answered on a questionnaire, it cannot be deleted.
EDIT THE ENTRUSTMENT SCALE FOR YOUR DEPARTMENT- OPTIONAL

A default Entrustment Scale is provided for use with EPA questions. Changes can be made to the scale, but each department has only one Entrustment Scale. Editing the Entrustment Scale is optional, but once the scale has responses attached to it, it cannot be changed. This is done to protect the integrity of your data.

1. Go to Evaluations > Milestones
2. On the EPA panel, click Configure
3. Click Entrustment Scale
4. Make changes to the text
5. Check the box, Include half points, if you want additional radio buttons to display on the scale. These four extra radio buttons will not have labels.
6. Click Save

MAP EPAS TO MILESTONES AND/OR SUBCOMPETENCIES

1. Go to Evaluations > Milestones
2. On the EPA panel, click Configure
3. Click the Map button next to an EPA
1. Click on the **Map to Milestones** tab
2. Click on a Subcompetency. The page will expand to display the milestones for that subcompetency.
3. The columns on the right represent each level of the Entrustment Scale. Our example below uses the default Entrustment Scale labels:
   - 1 - Only as an observer
   - 2 - With direct supervision
   - 3 - With indirect supervision
   - 4 - Independently
   - 5 - As an instructor of junior colleagues

4. Find the milestone that this EPA should be mapped to.
5. Click the number that represents the ‘minimum’ level of trust required to indicate that the resident has achieved this milestone.

In the example below, a resident who receives a score of three or above from an evaluator on this EPA is trusted to ‘Recognize abnormal vital signs.’
   - If a resident receives a score of 1 or 2 on this EPA from a faculty member, the feedback to the CCC on the Milestone Review will be that the resident has NOT achieved this milestone.
   - If a resident receives a score of 3 or above on this EPA from a faculty member, the feedback to the CCC on the Milestone Review will be that the resident HAS achieved this milestone.
Notes:

- EPAs can be mapped to multiple milestones under multiple subcompetencies
- Your selections are automatically saved
- Click the ‘X’ to delete your mapping
- Click on the subcompetency again to collapse the milestones
- Once your EPA has been mapped, click **View Summary** to preview the entire mapping for this EPA

Programs usually choose one method for mapping all their EPAs. Typically, we’ve seen most programs map their EPAs to subcompetencies. It is not necessary to map an EPA to both milestones and subcompetencies. Check with your Program Director for clarification.

### MAP EPA TO SUBCOMPETENCIES

1. Click on the **Map to Subcompetencies** tab
2. Check the box beside the subcompetency that should be mapped to this EPA
3. The columns on the right represent each level of the entrustment scale. By default, the faculty’s response on the Entrustment Scale will directly correspond to the Dreyfus scale for this subcompetency.

4. If you want something other than the direct correlation, click on a level of entrustment and adjust the score to the proper rating. You may adjust the scale up or down one value.
When the value is selected, it is displayed on the entrustment scale

Notes:

- EPAs can be mapped to multiple subcompetencies
- The choices you make are automatically saved
- Once your EPA has been mapped, click View Summary to preview the entire mapping for this EPA
CREATE THE FORM

After you’ve created your library of EPA questions, you’re ready to add them to an evaluation form. Select the scenario that best fits your situation:

- Copy an existing form and add EPAs to it
- Create a new form

COPY AN EXISTING QUESTIONNAIRE

As with our standard questionnaires, you’ll need to make a copy of your ‘old’ questionnaire and then add EPAs to this copy. This helps ensure the integrity of the data collected from the original form.

1. Go to Evaluations > Questionnaires
2. Select Copy from the Actions dropdown list beside the questionnaire you want to copy
3. Check the box in front of your Dept/Div
4. Click Copy
5. Click Edit from the Actions dropdown list beside the newly copied form. (The copy will have today’s date on it.)
6. Click Name/Title - Delete the date and make edits to the Name and Title and click Save.
7. Proceed to section called ‘Add an EPA.’

CREATE A NEW FORM

Create a New Questionnaire

1. Go to Evaluations > Questionnaires
2. On the Forms tab, click Add New
3. Select Create a new questionnaire
4. Enter a Name
5. Enter a Title
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
9. Proceed to section called ‘Add an EPA.’
ADD AN EPA

1. Click Add in the location where you would like to place an EPA.
2. Click EPA

3. Add an EPA:
   - Check the box(es) in front of the EPAs you want to add. Use the Search box, if necessary.
   - Click Add New to add a new EPA question to your library. Enter your EPA and click Save.

4. The ‘Require Response’ box will be checked by default. Uncheck if necessary.
5. The ‘Include Comments’ box will be checked by default. Uncheck if necessary.
6. Click Done
APPENDIX 2 – CUSTOM SUBCOMPETENCIES

With the Custom Subcompetency, we provide an empty Dreyfus box that allows you to enter your own text for the subcompetencies 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.

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.

CREATE THE FORM

Please follow the previous instructions for creating a new form or copy an existing form and proceed to section called 'Add a Custom Subcompetency'

ADD A CUSTOM SUBCOMPTENCY

1. Click Add
2. From the drop-down list, select Custom Subcompetency
3. Click Add New. An empty Dreyfus box will appear.
4. For Title, enter your subcompetency text
5. Click any of the Level headings to enter your own text. Click Save.
6. To add a Milestone narrative, click the '+' sign in the appropriate column, enter your text and click Save. Multiple milestones can be entered in each column by clicking the '+' sign and entering another milestone narrative. Move the milestones to another position by using the 'Click and Drag' functionality.
7. Other Options:
   a. Grade Scale: Click Edit to change the 1 to 5 grade scale to another option
   b. Include N/A Option: Check the box to include an N/A option. Change 'Not applicable' to a different text, if necessary.
   c. Require Response: Check the box to make this question required
   d. Include Comments: Check this box to include a comment box with this question
8. Save:
   a. Click Done, if you are finished
   b. Click Add Another to open another Custom Subcompetency box
9. Click Preview Questionnaire to view the text inside the Dreyfus box
OTHER OPTIONS

Add Instructions to a Question

1. Click **Add** where you would like to add instructions
2. Click **Instructions**
3. Enter instructions in text box (5,000 characters)
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.
4. Click **Delete Page Break** to remove the page break.
MAP CUSTOM SUBCOMPETENCIES

Your custom subcompetencies can be mapped to the ACGME published milestone subcompetencies providing the evaluation results to the CCC within a resident’s Milestone Review.

Select a Custom Subcompetency

1. Go to Evaluations > Milestones
2. On the Custom Subcompetency panel, click Configure
3. Click the Map button next to a custom subcompetency. (Those with a green 'Mapped' button have already been mapped.)

Map to Subcompetencies

1. Check the box before one or more subcompetencies. The faculty responses to this custom subcompetency will be mapped to these subcompetencies.
2. The columns on the right represent each level of your grade scale. They will be mapped on a 1-1 basis with the Dreyfus scale on the subcompetencies.
Notes:

- Your custom subcompetency can be mapped to multiple subcompetencies
- The choices you make are automatically saved
- Once your custom subcompetency has been mapped, click **View Summary** to preview what milestones and subcompetencies this custom subcompetency has been mapped to.
Evaluate your residents by placing the ACGME published subcompetencies directly on your evaluation forms. This can be done in two ways.

- Manually-Added: Place specific subcompetencies on your evaluation form. The resident is evaluated on that subcompetency regardless of the resident’s rotation.
- 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.

**MANUALLY-ADDED SUBCOMPETENCIES**

You have two options for manually adding subcompetencies to an evaluation:

- Copy an existing questionnaire and make edits to it. (If your existing questionnaire has been completed in the past, you will need to make a copy of the form. This is done to protect the integrity of existing data.)
- Create a new questionnaire

**CREATE THE FORM**

Please follow the previous instructions for creating a new form or copy an existing form and proceed to section called ‘Add a Subcompetency’

**ADD A SUBCOMPETENCY**

1. Click Add
2. Click Subcompetency
3. Select your program
4. Check the box(es) for the subcompetencies you want added to your form
5. Make adjustments to the ‘Require Response’ and ‘Include Comments’ checkboxes, if necessary
6. Click Done
Rotation-based subcompetencies can be added to your evaluation forms allowing your evaluators to rate the resident's level of competency in each area. Rotation-based subcompetencies can also be added to your existing questionnaires, even if they have data attached to them.

During the setup, you designate the subcompetencies that apply to each rotation. The software will then dynamically add the correct subcompetencies to the evaluation form based on the rotation the resident was on for that interval.

We'll also show you how to create a questionnaire that displays only the subcompetencies. You have the flexibility to add one or all of your subcompetencies to your evaluation forms.

Adding rotation-based subcompetencies to your questionnaire is a two-step process:

- First, designate the subcompetencies that apply to each rotation
- Secondly, select the questionnaire(s) that will include these subcompetencies

You can also apply subcompetencies to rotations from other departments. This ensures that your residents are evaluated on your subcompetencies, even if they have rotated out to another department.

**STEP ONE**

In this step, you’ll map or designate which subcompetencies should be included on the questionnaire for each rotation. You have the flexibility to include one, some or all of the subcompetencies to each rotation. This process only needs to be done once, even if you have multiple questionnaires.

1. Go to *Evaluations > Setup > Milestones*
2. In the Rotation panel, click **Configure**
3. Click **Choose Rotation** and select a rotation from the drop-down list
4. Check the box in front of each subcompetency you want included for that rotation
5. The **None/All** toggle can be used to quickly deselect or select all of the subcompetencies
6. The form automatically saves your selections.
7. Repeat this process until all necessary rotations have been mapped with the milestone subcompetencies

There is also an option to map your rotations by subcompetency. Click **Designate by Subcompetency** to map your rotations in this manner. Click **Milestone Setup** to return to the previous page.

**STEP TWO**

Designate which questionnaires will include the rotation-based subcompetencies.

1. Go to *Evaluations > Setup > Milestones*
2. In the Rotation panel, click **Configure**
3. Click the **Configure Questionnaires** tab
4. A list of your questionnaires appear on this page:
   a. Click **None** beside the questionnaire that will have the milestone subcompetencies included
   b. Click **Require** to make the milestone subcompetencies mandatory for evaluators
Preview Your Rotation-Based Questionnaire

Once you have mapped your subcompetencies to your rotations (Step 1) and designated the questionnaire that will have the subcompetencies (Step 2), you can preview what your questionnaire will look like.

1. Click the magnifying glass icon to the right of your questionnaire.

2. At the bottom of the preview screen, click Choose a rotation.
3. Select a rotation and preview the subcompetencies added to your questionnaire for that rotation according to your mapping.

Note: Milestones will only appear on the questionnaire if:

- The questionnaire has been designated to include milestone questions
- Your rotations have been mapped to the proper subcompetencies
- The subject is a trainee from your program with a training record and a block schedule. Rotators from another program will not be evaluated on the milestones from your program
CREATE A QUESTIONNAIRE WITH SUBCOMPETENCIES ONLY

You may want to create a questionnaire that only has the milestone subcompetencies. Here are the steps for creating this type of questionnaire.

Create Form

1. Go to Evaluations > Questionnaires
2. Click New
3. Select the radio button for Create a new questionnaire
4. Enter the Name of your questionnaire (This is only seen by the coordinator)
5. Enter the Title of your questionnaire (This is what the evaluator will see)
6. Click Create Questionnaire
7. On the Questionnaire Formatting screen, only these options will apply to the Milestone questions:
   a. General Comments - This adds a 'General Comments' box at the bottom of the form. By default, a comment box is included with each question.
   b. Header Display Options - Select the items you want to have appear on your evaluation form
8. Click Set formatting and Continue

Configure Milestones - Now we have to tell the software to include the milestone subcompetencies on this form.

1. Go to Evaluations > Setup > Milestones
2. In the Rotation panel, click Configure
3. Click the Configure Questionnaire tab
4. Click None, then Rotation beside this new questionnaire
5. Click Require to make the milestone subcompetencies mandatory for evaluators
APPENDIX 4 – MILESTONES – STATIC & SHIFT CARDS

The actual ACGME published milestones can be used as questions on two different types of evaluation forms: The evaluation of a resident at the end of a rotation and on daily Shift Cards. The grade scale for milestone questions are ‘Yes,’ ‘No,’ and ‘Not Observed.’ The 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.

Add milestone questions in two ways:

- **End of Rotation Evaluations** - These evaluations are distributed at the end of a rotation and can include the milestone narratives that you manually selected. The milestone questions can be mixed with other types of questions on your resident evaluation form.
- **Shift Cards** - These daily shift evaluations only include milestone narratives as 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 to evaluate their residents and fellows at the end of a shift.

Both styles will be explained below.

### END OF ROTATION EVALUATIONS

You have two options for adding milestones to an end of rotation evaluation:

- Copy an existing questionnaire and make edits to it. (If your existing questionnaire has been completed in the past, you will need to make a copy of the form. This is done to protect the integrity of existing data.)
- Create a new questionnaire

Both methods will be shown.

### CREATE THE QUESTIONNAIRE

#### COPY AN EXISTING QUESTIONNAIRE

1. Go to Evaluations > Questionnaires
2. Click Actions and Copy to the right of the questionnaire you want to copy
3. Make sure your Dept/Div is checked
4. Click Copy
5. Click Actions and Edit to the right 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. Click Save.
7. Proceed to section called ‘Add a Milestone Question’
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*
9. Proceed to section called ‘Add a Milestone Question’
ADD A MILESTONE QUESTION

1. Click Add
2. Click Milestone
3. Select your program
4. Select the subcompetency from the drop-down list
5. Check the box for the milestone(s) you want added to your form
6. Make adjustments to the 'Require Response' and 'Include Comments' checkboxes, if necessary
7. Click Done
DAILY SHIFT CARDS

Shift Cards are daily evaluations that your evaluators can use to assess your residents on your program’s ACGME published milestones. Faculty members read the actual milestone verbiage and complete the question with a Yes, No or N/A response. Shift Cards were designed primarily for Emergency Medicine programs but other programs, like Surgery, Anesthesiology, and Radiology, can make use of these daily evaluations to easily assess their residents’ performance on their own milestones. In fact, all programs who have published milestones can use Shift Cards to evaluate their residents. The results gathered by the Shift Cards are made available to your Clinical Competency Committee while they’re completing the resident Milestone Reviews.

CREATE A SHIFT CARD QUESTIONNAIRE

1. Go to Evaluations > Questionnaires
2. Click New
3. Select Create a new questionnaire
4. For Name, enter Shift Card (for example)
5. For Title, enter Shift Card (for example)
6. Click Create Questionnaire
7. If you want to include a general Comments box, go to General comments position and select at Bottom
8. Click Set Formatting and Continue

No further action is needed on this questionnaire. The milestone questions will be added dynamically later on.
CONFIGURE SHIFT CARDS

1. Go to Evaluations > Milestones
2. Under Shift, click Configure
3. On the Milestone Setup page for Shift Cards, there are three steps:

**Step 1 – Milestone Pool tab**
Select the milestones that you want included in your pool of milestone questions. The system will randomly select questions from this pool of questions to create your Shift Cards. Use the handy selection tools provided to:

- Select or deselect an entire level of questions. Ex: Click '5' to remove all Level 5 questions from the milestone pool.
- Select or deselect an entire milestone. Ex: Remove PC 12 from all levels.
- Click Preview to view a sample Shift Card for each level

**Step 2 – Settings tab**
- Questions per Shift Card - Select the number of milestone questions you would like on each Shift Card
- Preset Values – Default levels have been preset indicating the level of questions that will be given to residents in each year of their residency. Select or deselect the Preset Levels for each year. For example, if you select Levels 2 and 3 for your first year residents, Level 2 and 3 milestones will be placed on their Shift Cards.

**Note**: If no Milestone Review has been completed on a resident, the software will look at the Preset Values that you have established for selecting the milestones that will appear on the Shift Cards. Once the CCC has completed a Milestone Review on a resident, the software will look at the review results and randomly select milestone questions from the resident’s current level, plus one level above. For example, if a resident scored a Level 3 on PC1 on the previous Milestone Review, they will then be evaluated on both Level 3 and Level 4 milestones on their Shift Cards for PC1. The software will adjust the level of questions with each Milestone Review that is marked as completed.
Step 3 – Configure Questionnaires tab

- A list of your questionnaires will appear on the screen.
- To designate the questionnaire that will be used for Shift Cards, click **None**, then select **Shift**, in front of your questionnaire.
- Click **Require** if evaluators are required to answer the milestone questions before they can save their Shift Card.
Distribute Shift Cards in Evaluations Module

Your next step is to build an on-demand session that will make the Shift Card available to your faculty members.

Create a Session
1. Go to Evaluations > Add Session
2. For Name, enter Shift Cards
3. Enter Yes or No for email notifications
4. Enter Yes or No for evaluator signatures
5. Click Create New Session

People Tab
1. Select your Evaluator and Subject status types
2. Click Include evaluators from other departments, if you want your Shift Cards to be available to people from other departments
3. The On Demand section has been prefilled to allow on demand evaluations on a daily basis (This occurs only if the questionnaire you selected for this session has already been designated as a Shift Card.)
4. Optional: Click Customize evaluator list if you want to specify certain people as evaluators. For example, you may want Shift Cards to only a few of your faculty members and not all of them.
5. Click Save Changes

Rotations Tab
1. Select the rotations that will use Shift Cards
   • Double-click on a rotation to move it to the right - OR
   • Use the double-arrows to move all rotations to the right
2. Click Save Changes

Questionnaire Tab
1. Verify that you’ve selected your Shift Card questionnaire
2. Click Add Signatures if you want to add additional people to sign the Shift Card
3. Click Save Changes

Settings Tab
1. Email Settings
   • Select your email settings
   • New for Shift Cards: On Demand Reminders – Indicate how often you want us to send your evaluators reminders about Shift Cards
2. Verify your Contact Information
3. Select your Anonymity Settings. Typically, it would be ‘None’ for Shift Cards
4. Click Save Changes

Match Schedule Tab
1. The Automatic Matching box has been unchecked, because these are on-demand evaluations
2. Configure your End of Session Settings. Click Save Changes
3. Click Add New Interval
4. Create Evaluation Schedule
   • Use the current academic year, for example
• Set your own time – Enter the start and end dates. Indicate how many intervals you want for this session. Ex: Quarterly
5. Click Create Schedule
6. Adjust any dates, if necessary. Note: Shift Cards will be available from the first day of the interval until the Due Date of the last interval.
7. Click Continue

FACULTY VIEW OF SHIFT CARDS

There are two ways for faculty to access the Shift Card evaluations: On their Home Page and in the Evaluations module.

Home Page

1. On your Home page, in the Notifications section, click the Evaluate Subject drop-down list
2. Select a Subject

3. Once the evaluation appears, select the date that you worked with the person. It will default to the current date.

4. Complete the evaluation
5. Check the box to confirm your electronic signature, if provided.
6. Click Submit Final
Evaluations Module

1. From your Home page, go to Evaluations > Complete an Evaluation
2. In the right panel, click Choose Subject

3. Find your resident and click Shift Card (or whatever your department is calling this type of evaluation)

4. Once the evaluation appears, select the date that you worked with the person. It will default to the current date.
5. Complete the evaluation
6. Check the box to confirm your electronic signature, if provided.
7. Click **Submit Final**
APPENDIX 5 – QUESTIONS

OVERVIEW

Add questions in your own words to your evaluation forms to collect information about the competency levels of your residents. You customize the wording of the question and grade scale to meet your specific needs. Then map these questions to milestone subcompetencies to provide valuable feedback to your Clinical Competency Committee.

CREATE THE FORM

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 the Actions dropdown list next to the questionnaire to copy
3. Make sure your Dept/Div is checked
4. Click Copy
5. Click Edit in the Actions dropdown list for the copied form. (It will have today’s date on it.)
6. Click Name/Title to edit the name and title, and possibly delete the date. Click Save.
7. 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

• 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
9. Proceed to section called ‘Add a Question’

<table>
<thead>
<tr>
<th>ADD A QUESTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Click Add</td>
</tr>
<tr>
<td>2. From the drop-down list, select Question.</td>
</tr>
<tr>
<td>3. Category - Select one:</td>
</tr>
<tr>
<td>• Existing Category - Select a category from the drop-down list</td>
</tr>
<tr>
<td>• New Category - Type the new category in the text box, select the appropriate core competency, and check the box to add this category to your favorites.</td>
</tr>
</tbody>
</table>
4. **Question - Select one:**
   - Existing Question - Select a question from the drop-down list
   - New Question - Type in a new Question in the text box. Check the box to 'Add this Question to your Favorites.'

5. **Grade Scale - Select one:**
   - Select a grade scale from the dropdown list
   - Click Add New Grade Scale and follow the steps

6. **Other:**
   - If the evaluator must answer this question, check the 'Requires Response' box
   - Check the box to 'Stretch scale to fill form,' so that the scale is evenly distributed across the page
   - Choose whether you want the grade scale to appear 'below' or 'beside' the question. If you’re placing your grade scale 'beside' the question, choose what percentage of space in the row belongs to the question.

7. **Additional Options:**
   - Check 'Include Individual Comment' to provide a comment box for this question
     - Select the size of the comment box
     - Select the position of the comment box
     - Select the requirement options for the comment box
   - Check the box to 'Include N/A Option.' Change the verbiage, if necessary, in the text box.

8. **Click Save**
MAP QUESTIONS TO SUBCOMPETENCIES

Map the responses to the individual evaluation questions to specific milestone subcompetencies. The responses will appear as Evaluation Feedback to your Clinical Competency Committee within a resident’s Milestone Review.

1. Go to Evaluations > Milestones
2. In the Questions panel, click Configure
3. Select a questionnaire from the list (Note: The red 'Pin' indicates that the questionnaire has been mapped to subcompetencies.)
4. Click OK
5. A list of the questions on this questionnaire will appear.
6. From the ‘Select Milestone Competency’ drop-down list, select a category and subcompetency. For example: Patient Care and PC 1. (Note: The red ‘Pin’ indicates the subcompetencies that have already been mapped to questions.)

7. Click on the question that should be linked to that subcompetency.
8. An icon with the number of the subcompetency will appear in a blue box to the left of the question.
9. Select a different category and subcompetency and continue to map your questions. Multiple subcompetencies can be assigned to a question.
10. Each question/competency relationship is automatically saved.

Check Coverage

1. Once you have mapped a subcompetency, a statement will appear that says “Currently mapped on 2 questionnaires,” as shown below. In this example, it tells us that subcompetency PC 1 has been mapped on 2 questionnaires.
2. Click on "2 questionnaires" to view the names of the questionnaires, along with the number and text of the question that is mapped to this subcompetency. Click the 'X' in the top right corner to close this popup.

**Edit Milestone Mapping**

If you want to delete a subcompetency that you previously assigned to a question, follow these steps:

1. Select the subcompetency from the drop-down list
2. Hover over the subcompetency indicator and click the red 'X' to remove
3. No saving is necessary. Your choices are automatically saved.
Conference Evaluation

At the conclusion of the Conference, you will be asked to complete an evaluation of your experience. We value your feedback and will use the information we gather to continually improve our New Innovations Conference offerings.

Please go to the website listed below to complete the evaluation.