

# **myPortfolio Administrator's User Guide**

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## So, what's new with myPortfolio?

The newest version of myPortfolio includes several new features that may be unfamiliar to you.

**New Layout** – myPortfolio's layout has been updated to provide quicker access to the tools you use most. This user guide will explain the changes made to the layout and provide in-depth information on how each section works.

**Tagging Files and Activities** – Tags are sortable labels that are assigned to each file or activity uploaded to the Portfolio. When uploading files, you will have default tags corresponding to the ACGME competencies that you may assign to the file or activity. If you wish to add a tag other than the ACGME Competencies, you can add your own tag to a file or activity. You can then sort the contents of your Portfolio by tags you have assigned.

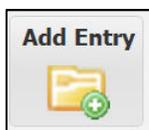
**Integration of ACGME Competencies** – With our new file/activity tagging feature, you can now assign core ACGME Competency categories to any entry in myPortfolio. We have added an enhanced search feature that allows you to filter myPortfolio entries by competency.

## Portfolio Tour

MyPortfolio is organized into several sections to make documenting residents' educational progress an easy process. Below, each section of myPortfolio is explored in further detail.

### Home

This section provides a homepage for myPortfolio, including a "News Feed" that details the most recent updates to your myPortfolio. You can access all major functions from this page.



**Add Entry** – this button is used whenever you wish to upload documents or activities to the Portfolio. For specific instructions on uploading files and activities to myPortfolio, please see page 11-15

Each entry that is made into the Portfolio will be assigned one of the following resources:

Case Logs	Credentials
Individual Learning	QA/QI
Scholarly Activity	Self-Assessment
Miscellaneous	Summary Evaluation



**Residents** – this button is used by program administrators to toggle back and forth between resident Portfolios. Clicking on this button will provide a drop-down list of residents; simply click on the resident's name to be taken directly into their Portfolio.

The “Home” page also provides a “News Feed” to keep track of the newest additions to your Portfolios:

**myPortfolio - Taylor Kenney** Add Entry Residents

**Welcome** to the new RSNA/APDR myPortfolio! Here you will find all the tools you need to document your ACGME learning experiences. No matter where you are in your career - from Resident to Program Director - myPortfolio will always host your learning documents!

**New to myPortfolio:** As you can see, we have been hard at work re-designing myPortfolio to make your work-flow much easier. [Click here](#) to learn more about all the improvements we've made!

**★ News Feed** - *What's new in your myPortfolio*

**Oct 19, 2011:** A new **Scholarly Activity** was added!

 **Common and Uncommon Causes...** - *(Scholarly Activity)* **Type:** Entry  
**Created:** Oct 19, 2011

 Discuss

**Oct 19, 2011:** A new **Scholarly Activity** was added!

Use the “Home” section as a jumping off point for all of your Portfolio needs.

## Getting Started

This page describes updates and “need to know” information about myPortfolio. User Guides and FAQs are available from this section, as well as contact information in case you have questions. Updates to myPortfolio are documented here, so check back frequently for new updates!

## Resources

This section allows you to sort, search, and view entries (“resources”) into myPortfolio.

**Resources Search** – Use this feature to search resources (files or activities) uploaded to myPortfolio. Simply type in your search term, and press the magnifying glass button to begin your search.

**Resource Search**

breast

**Quick Filters**

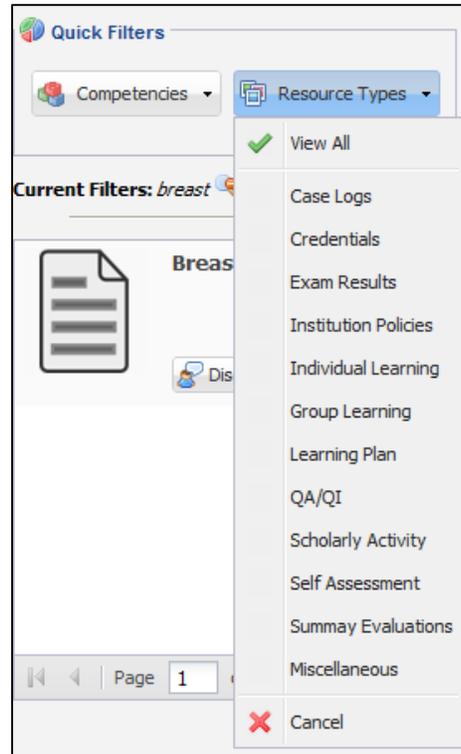
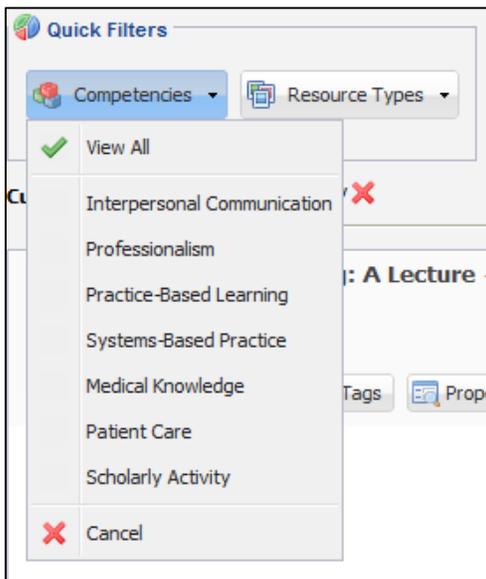
Competencies Resource Types

**Top Tags**

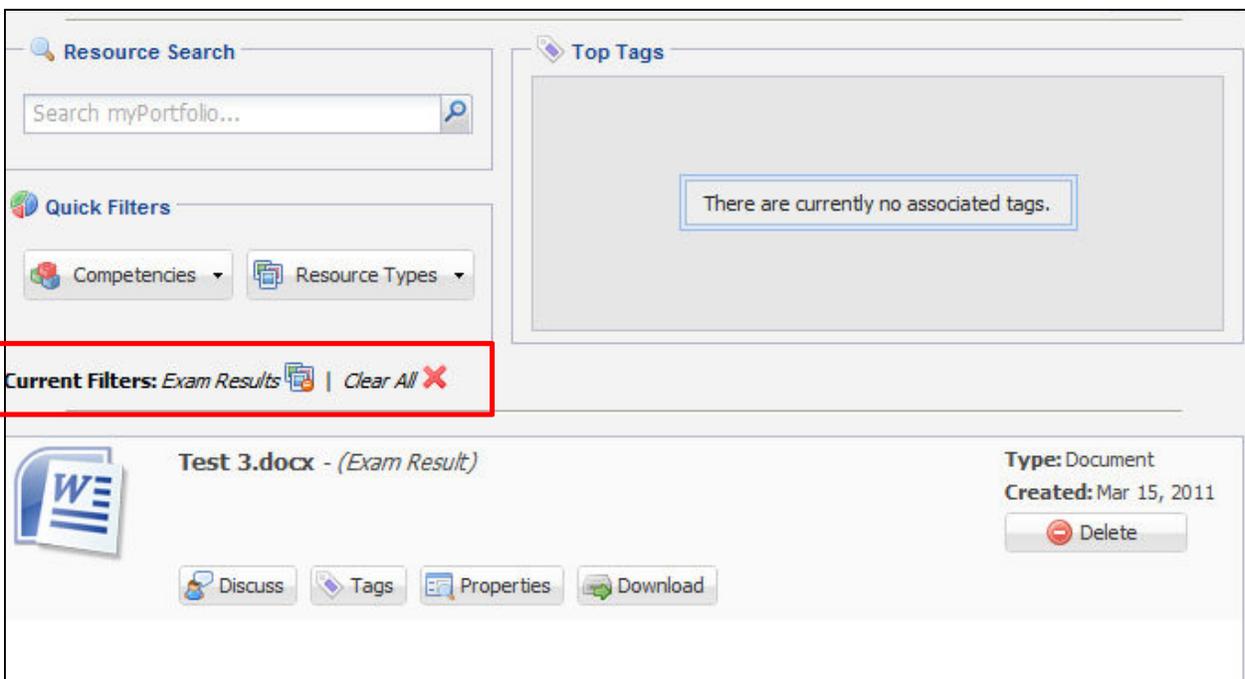
There are currently no associated tags.

## Quick Filters

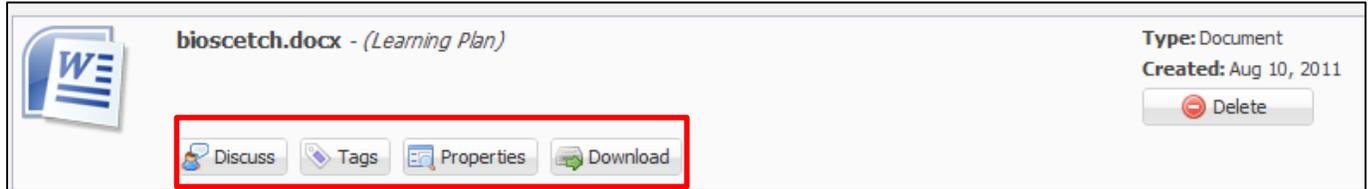
This section allows you to filter files and activities in myPortfolio by either Competency or Resource Type. Choosing a resource type or competency will filter those search results to the top of your Resources page.



When doing multiple searches, remember to clear your filters! To clear a search filter, hover your mouse over the filter and click to delete. To clear all filters, click "Clear All"



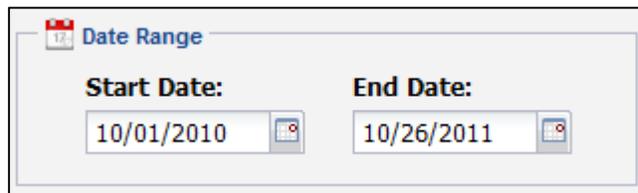
You can also edit files uploaded to myPortfolio by using the function buttons right under your file in myPortfolio:



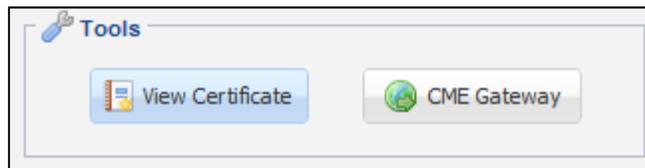
## **Education Credits**

This section of myPortfolio documents CME credits obtained by the resident.

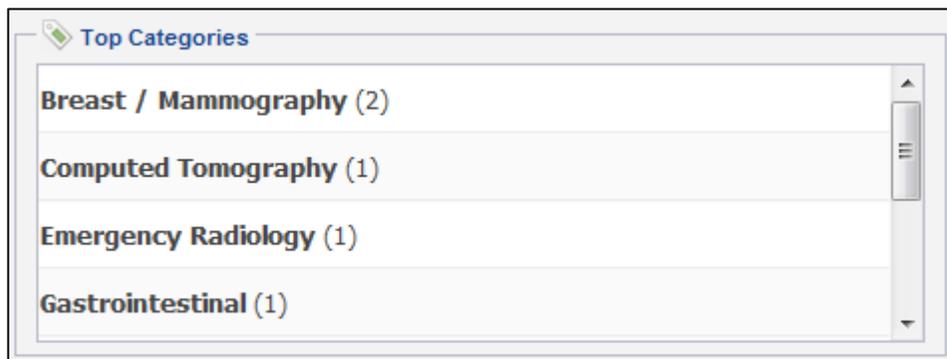
**Date Range** – use this functionality to search for CME credits in a certain time-frame. Click on the calendar icon to change the Start and End date, or simply type in the dates you wish to use. myPortfolio will automatically populate all CME credits during that time period.



**Tools** – this area provides quick-links to view a cumulative CME certificate or to access the CME Gateway with a click of a button.



**Top Categories** – this area provides a quick overview of the top categories of CME credits you have obtained. You can easily keep track of your completed CME requirements by using this feature.

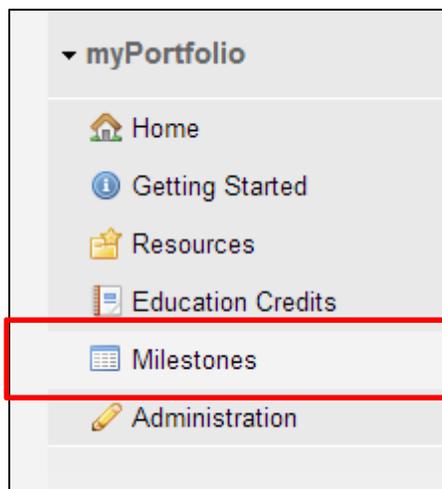


**CME Credits** - Resident CME credits are displayed in the panel below the search options detailed above.

<b>Totals - AMA PRA Category 1 Credits™: 4.5   SAM Credits as qualified by the ABR: 2</b>	
<b>RY-MS-RAD-11-1983 ~ Pulmonary Volume Loss and Diaphragm Shift after Endobronchial Valve Placement: Documentation by Standard Chest x-ray</b>	
Date Awarded: October 21, 2011	AMA PRA Category 1 Credit™: 0.5
<b>Self-Assessment Module: Imaging Pregnant Patients – Appropriateness &amp; Risk</b>	
Date Awarded: October 6, 2011	AMA PRA Category 1 Credits™: 2.5
Categories <a href="#">Genitourinary</a>   <a href="#">OB/GYN</a>   <a href="#">Quality Assurance</a>	SAM Credit as qualified by the ABR: 1
<b>Self-Assessment Module: Acute Conditions of the Abdomen</b>	
Date Awarded: September 15, 2011	AMA PRA Category 1 Credit™: 1.5
Categories <a href="#">Computed Tomography</a>   <a href="#">Emergency Radiology</a>   <a href="#">Gastrointestinal</a>	SAM Credit as qualified by the ABR: 1
Page 1 of 1	Displaying 1 - 3 of 3

## Milestones

1. Once logged in, click on the “Milestones” menu item on the left-hand side.



2. You will be taken to the main milestone interface and will have options to enter your resident milestone progress:

**By Year/Class OR By Milestone**

**View Residents By Year**

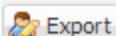
Year:  ▼

Milestone:  ▼ 

You may also export any milestone data by using the “Export” button that can be found on the main milestone interface. You will be prompted to download an excel document containing this data:

**View Residents By Year**

Year:  ▼

Milestone:  ▼ 

**Entering Milestones by Year/Class**

- a. Select the group of residents you’d like to view using the “Year” drop-down menu. You can also choose “All” to see all of your residents at once.

**View Residents By Year**

Year:  ▼

Milestone:  ▼ 

Events with comments will be marked with an \*.

- b. You will see a roster of residents populated based on the selection you made, with information populated based on milestone completion for each resident. The number listed is the highest level completed by the resident for that milestone:

Resident Name	PCTS1	PCTS2	MK1	MK2	PROF1	ICS1	ICS2	SBP1	SBP2	PBL1	PBL2	PBL3
David Pede	3	0	0	0	3*	0	0	0	0	0	0	0

- c. To record a resident’s progress on a milestone, simply click on the number below the milestone you’d like to edit. For example, to edit PCTS1 milestone for this resident, you would click here:

Resident Name	PCTS1	PCTS2	MK1	MK2	PROF1	ICS1	ICS2	SBP1	SBP2	PBL11	PBLI2	PBLI3
David Pede	3	0	0	0	3*	0	0	0	0	0	0	0

- d. Clicking on a level will open a pop-up window in which you can record resident’s progress on this milestone. Checkboxes are provided for each level for this milestone, triggered by placing a checkmark next to the level that has been completed.

If you are unsure about a specific milestone level, click the blue info icon to read a full description of this milestone level/item.

You also have the opportunity to add comments regarding this milestone. These comments will be viewable at any time by re-opening this pop-up box.

**"PCTS1" Milestone for David Pede**

**Level 1:** Uses established evidence-based imaging guidelines. ⓘ

**Level 2:** Recommends appropriate imaging of common\* conditions independently. ⓘ

**Level 3:** Recommends appropriate imaging of uncommon\* conditions independently. ⓘ

**Level 4:** Integrates current research and literature with guidelines. ⓘ

**Level 5:** Participates in research, development, and implementation of imaging guidelines ⓘ

Comments:

After you have completed updating this milestone and are ready to save, use the “Save” button in the lower right-hand corner to save your work and close this pop-up window. The highest level achieved for this milestone will now be displayed for this resident.

Resident Name	PCTS1	PCTS2	MK1	MK2	PROF1	CS1	ICS2	SBP1	SBP2	PBL1	PBL2	PBL3
David Pede	5	0	0	0	3*	0	0	0	0	0	0	0

- If a resident is keeping current with their milestone requirements based on their program year, then milestone numbers will be **displayed in blue**, indicating that this milestone is in-progress.
- If a resident is ahead of schedule on completion of milestones based on their program year, milestone numbers will be **displayed in green**, indicating that this milestone is currently ahead of completion schedule. All residents who achieve level 5 on a milestone will also be displayed in green.
- If a resident has fallen behind on a milestone requirement based on their program year, then milestone numbers will be **displayed in red**, indicating that this milestone is not currently on-track.
- If any number is designated with an asterisk (\*), this indicates that comments have been made on this milestone item and can be reviewed again at a later date by clicking on the milestone level number.

### **Entering Milestones by Individual Milestone**

- Select the group of residents you'd like to view using the "Year" drop-down menu. You can also choose "All" to see all of your residents at once.
- Then, choose the milestone you'd like to submit progress for using the "Milestone" drop-down menu.

**View Residents By Year**

Year:  ▼

Milestone:  ▼

 Export

Events with comments will be marked with an \*.

- Below this drop-down menu, you will see the interface change to represent check boxes for each level completed for this milestone for each resident:

Resident Name	Level 1 	Level 2 	Level 3 	Level 4 	Level 5 
David Pede	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ed Pietrzak	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Education Center	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Simply click in an empty box to mark this level as “Complete” for this resident and milestone. To remove a checkmark, simply click on the checked box. You will see that the checkbox entry is removed.

- d. If you wish to view full level description on a particular milestone, simply click on the blue “Info” icon at the top of the column to read more about the requirements for this milestone level.
- e. All of your information is automatically saved. You do not need to save to retain this information.
- f. To return to the main milestone view, use the “Milestone” drop-down menu and choose “Reset”.

## **Administrative Tools**

This area of myPortfolio provides administrators with additional tools to maintain their residents’ portfolios. Below is a description of each section, as well instructions for using each section.

### **Summary Evaluations**

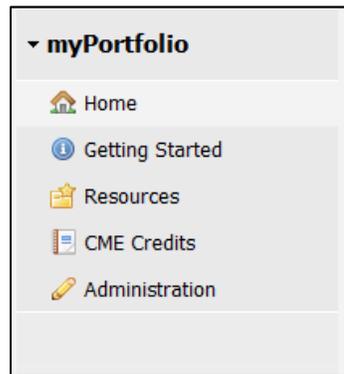
This section provides a place for Program Administrators to upload resident summary evaluations. Residents will see the file show up in their respective Portfolio, but will only have read access.

Summary evaluations can be either files uploaded to myPortfolio (see page 11-15 for instructions on file uploading) or group activities attended by residents.

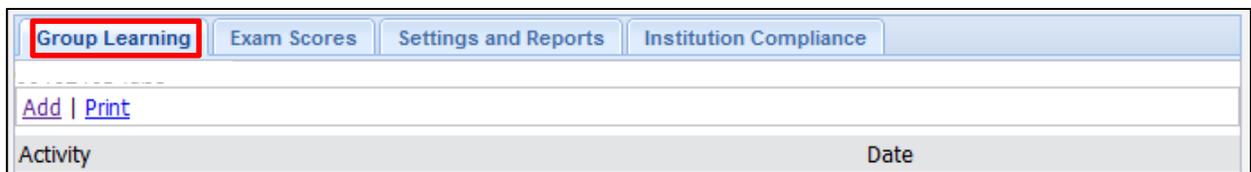
### **Group Learning**

This section provides a place for Program Administrators to upload resident group activities. Activities in this section should be group-participation events such as lectures, grand rounds, etc. When a Program Administrator uploads an activity to this section, residents will see the activity show up in their respective Portfolio, but residents will only have read access to these items.

1. On the myPortfolio homepage, click on “Administration”



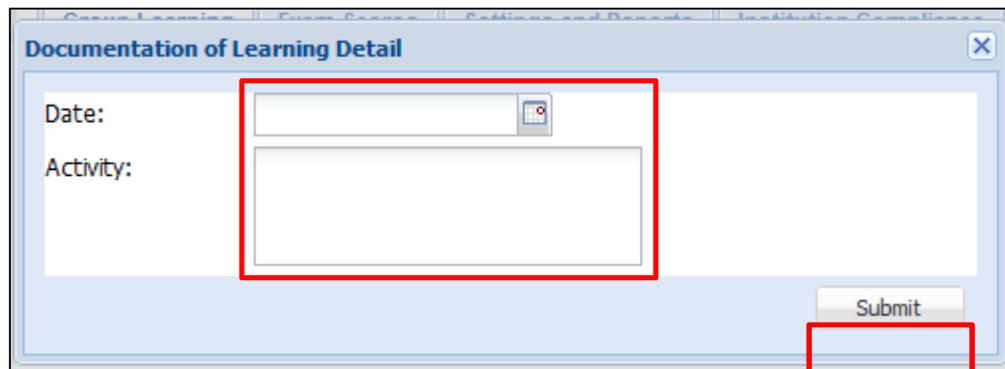
2. Click on the tab that says “Group Learning”



3. Click on “Add”



4. Assign a title and date to your Group Learning Activity, and press “Submit”



5. You will be taken back to the Group Activity tab and you will see your activity appear



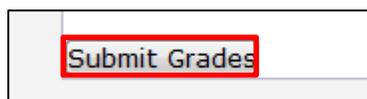
6. To document who attended this group activity, click on “Attended”

<a href="#">Group Learning</a>   <a href="#">Exam Scores</a>   <a href="#">Settings and Reports</a>   <a href="#">Institution Compliance</a>			
<a href="#">Add</a>   <a href="#">Print</a>			
Activity	Date		
User Guide	Nov 1, 2011	<a href="#">Attended</a>	<a href="#">Edit</a> <a href="#">✕</a>

7. On the next page, you will see a list of all of your residents. Simply fill in the attendance information for each resident that participated in the group activity

User	ATTENDED	NOTES
Taylor M. Kenney	Yes <input type="radio"/> No <input type="radio"/> N/A <input checked="" type="radio"/>	

8. **Be sure to save your changes** by clicking “Submit Grades” at the bottom of the page.



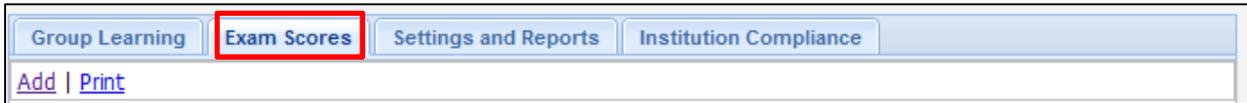
### **Exam Results**

This section allows Program Administrators to upload resident exam scores. Exam scores uploaded to this section will appear in the resident’s respective Portfolios. Residents may not edit exam scores as entered by their Program Administrators. To upload an exam results score:

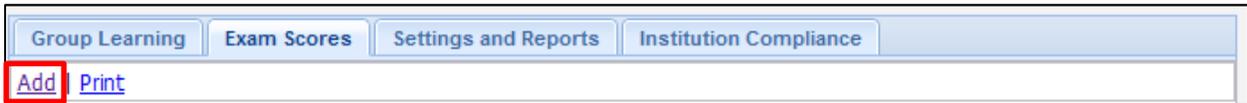
1. On the myPortfolio homepage, go to “Administration”



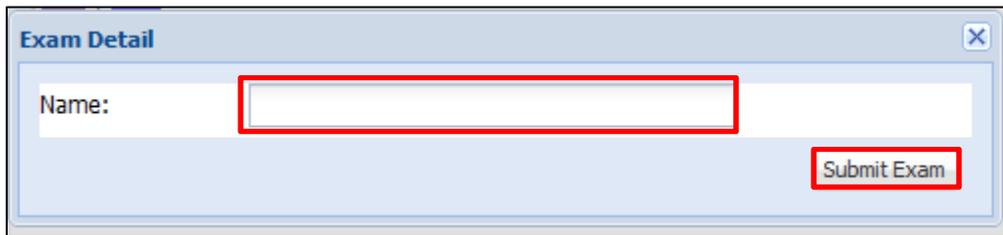
2. Click on the tab that says, “Exam Results”



3. Click on "Add" to add a new exam



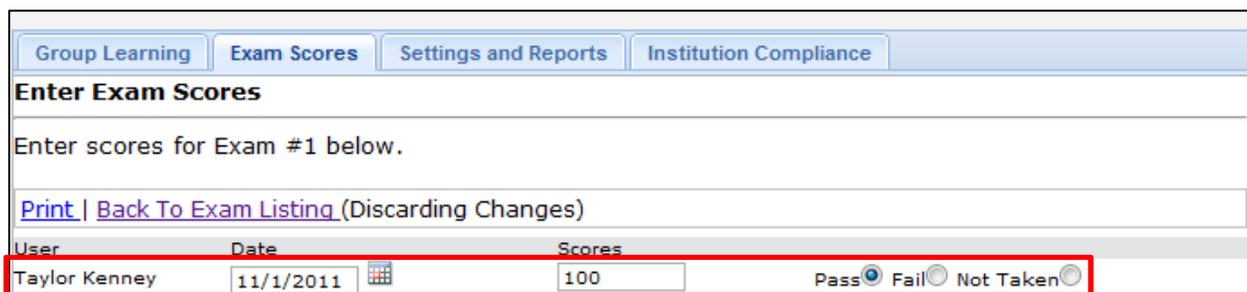
4. Enter a name for your exam, and press "Submit Exam"



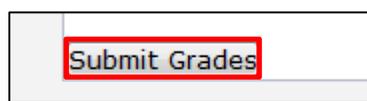
5. You will see your exam added to your Exam Results section. Click on "Grade" to enter individual scores.



6. On the next screen, you will see a list of your residents. For each resident, enter the date of the exam, their scores, and whether the exam was passed or failed. If a resident missed an exam, leave "Not Taken" checked.



7. When you are finished entering grades for all your residents, **be sure to save your changes** by clicking the "Submit Grades" at the bottom of the page.

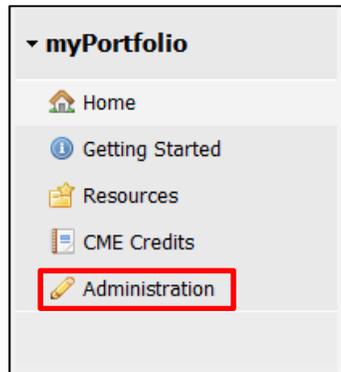


To delete an exam, you must remove (delete) all scores and pass/fails for each resident. Once this step is complete, a red “x” will appear next to your exam and you may use this to delete the exam entirely.

### **Institution Policies**

This section allows Program Administrators to track resident compliance with institutional policies and procedures. To upload a policy:

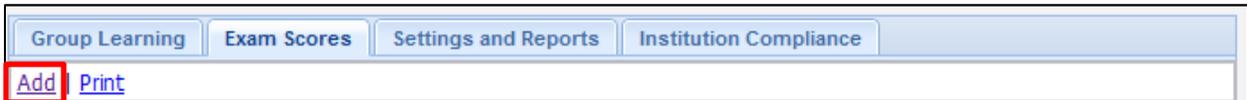
1. On the myPortfolio homepage, go to “Administration”



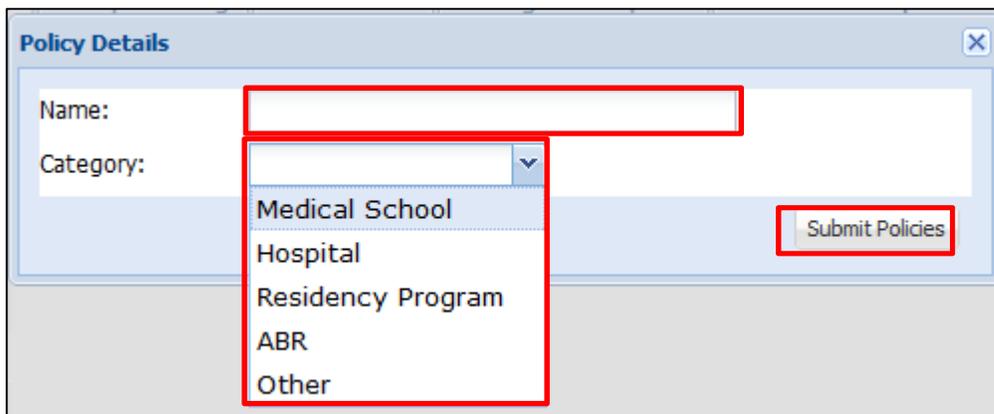
2. Click on the tab that says “Institution Compliance”



3. Click on “Add” to add a new policy compliance to myPortfolio



4. Fill in the required information for your policy compliance. Use the drop-down box to choose what category this should fall under. Then click “Submit Policies”

A screenshot of the "Policy Details" form. The form has two input fields: "Name:" and "Category:". The "Name:" field is empty and highlighted with a red rectangular box. The "Category:" field is a drop-down menu with a list of options: "Medical School", "Hospital", "Residency Program", "ABR", and "Other". The "Submit Policies" button is highlighted with a red rectangular box.

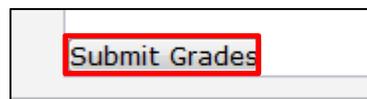
5. Your institutional policy will be saved and will appear on your list of policies. To start recording resident compliance, click on “Compliances”

<a href="#">Group Learning</a> <a href="#">Exam Scores</a> <a href="#">Settings and Reports</a> <a href="#">Institution Compliance</a>	
<a href="#">Add</a>   <a href="#">Print</a>	
Name of Policy	Category
Demo Policy #1	Residency Program
<a href="#">Compliances</a> <a href="#">Edit</a>	

6. On the next screen, add the date, compliance information, and comments on the policy compliance.

<a href="#">Group Learning</a> <a href="#">Exam Scores</a> <a href="#">Settings and Reports</a> <a href="#">Institution Compliance</a>			
<b>Set Institution Policy Compliance</b>			
Setup compliance for your users below for Demo Policy #1			
<a href="#">Print</a>   <a href="#">Back To Policy Listing</a> (Discarding Changes)			
User	Date	Compliant	Comments
Taylor Kenney	<input type="text"/>	<input type="checkbox"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Nothing Selected	<input type="text"/>

7. When you are finished entering grades for all your residents, **be sure to save your changes** by clicking the “Submit Grades” at the bottom of the page.



### **Archive**

This feature allows either the resident or the administrator to pull an auto generated file of everything that is in a particular portfolio, including the attachments. When a resident graduates (or a print-out is needed) this feature allows users to capture the data for a particular portfolio and store the file on their hard drive for future reference.

To pull an archive, simply click on the link that says “Archive”.

## Tutorial: Uploading a File to myPortfolio (any section)

1. Log into myRSNA, and access myPortfolio
2. Look for the button in the upper-right that says, "Add Entry"

**myPortfolio - Taylor Kenney** **Add Entry** Residents

**Welcome** to the new RSNA/APDR myPortfolio! Here you will find all the tools you need to document your ACGME learning experiences. No matter where you are in your career - from Resident to Program Director - myPortfolio will always host your learning documents!

**New to myPortfolio:** As you can see, we have been hard at work re-designing myPortfolio to make your work-flow much easier. [Click here](#) to learn more about all the improvements we've made!

**News Feed - What's new in your myPortfolio**

**Aug 10, 2011:** A new **Learning Plan** was added!  
**bioscetch.docx - (Learning Plan)** Type: Document  
Created: Aug 10, 2011

**Aug 10, 2011:** A new **Individual Learning** was added!  
**IS+Request+Form,+July+2011.pdf - (Individual Learning)** Type: Document  
Created: Aug 10, 2011

**myPortfolio**

- Home
- Getting Started
- Resources
- CME Credits
- Administration

3. On the next screen, you'll be asked to select what type of upload you'd like to do. Choose the area that best fits your needs

**Add an entry to myPortfolio**

**Welcome to the myPortfolio Entry Wizard!**

Select type of entry you would like to add:

- Case Logs
- Credentials
- Individual Learning
- Learning Plan
- QA/QI
- Scholarly Activity
- Self Assessment
- Miscellaneous
- Summary Evaluation

Would you like to upload a file as Documentation of Individual Learning, or fill out a form to create an entry?

**Upload a file** **Fill in a form**

**Cancel** **Back** **Next** **Finish**

4. If you have chosen a section that allows you to upload files or fill out a form, you'll be asked to select whether you'd like to "Upload a File" or "Fill in a Form".

The screenshot shows a sidebar menu on the left with the following items: Case Logs, Credentials, Individual Learning (highlighted with a red box), Learning Plan, QA/QI, Scholarly Activity, Self Assessment, Miscellaneous, and Summary Evaluation. The main content area contains the text: "Would you like to upload a file as Documentation of Individual Learning, or fill out a form to create an entry?". Below this text are two buttons: "Upload a file" (with a floppy disk icon) and "Fill in a form" (with a document icon), both highlighted with red boxes.

5. Click "Next" when you are ready to proceed.

The screenshot shows a "Summary Evaluation" section at the top. Below it, there is a navigation bar with four buttons: "Cancel" (with a red X icon), "Back" (with a left arrow icon), "Next" (with a right arrow icon, highlighted with a red box), and "Finish" (with a green checkmark icon).

6. On the next screen, you will be asked to either browse your computer to find the file you wish to upload or fill out a form for the activity.

**To Upload a File:**

Use the "Browse" button to select your file.

The title of your document will be automatically populated based on your file name. If you'd like to change the file name, simply click inside the "Title" box and begin typing.

When you're ready, click "Next".

 **Add an entry to myPortfolio**

### Select your Individual Learning file

Use the form below to select which file you would like to upload.  
If you'd like to rename the file, just edit the "Title" field.

**File:**   Browse... 

**Title:**  

 Cancel  Back  Next  Finish

### To Fill in a Form

To fill out a form for an activity, simply fill in the blanks provided.

 **Add an entry to myPortfolio**

### Complete the form below

Fill in the form to create a "learning plan" entry.

**Topic/Question:**  

**Category:**   

**Entry Date:**   

**Admin Notes:**  

**Why do you need to know this?:**

**Sources:**  

**Answer/Result:**  

**Follow-up/action taken as a result:**  

 Cancel  Back  Next  Finish

When you're ready, click "Next".

7. On the next screen, you'll be asked to add tags to your document.

Tags are labels you put on each file or activity uploaded to the Portfolio. The default tags available for myPortfolio documents correspond with the ACGME Core Competencies for residents. Simply click on the checkbox next to the competency you wish to assign to this file or activity.

**Add an entry to myPortfolio**

### Core Competencies & Additional Tags

Use the checkboxes below to flag your new entry with one or more of the ACGME Core Competencies.

While you're at it, check out the tagging area to add RadLex (or custom term) tags to your entry for easy searching and organization.

**Core Competencies:** ⓘ

<input type="checkbox"/> Interpersonal Communication	<input type="checkbox"/> Professionalism	<input type="checkbox"/> Practice-Based Learning
<input type="checkbox"/> Systems-Based Practice	<input checked="" type="checkbox"/> Medical Knowledge	<input type="checkbox"/> Patient Care
<input type="checkbox"/> Scholarly Activity		

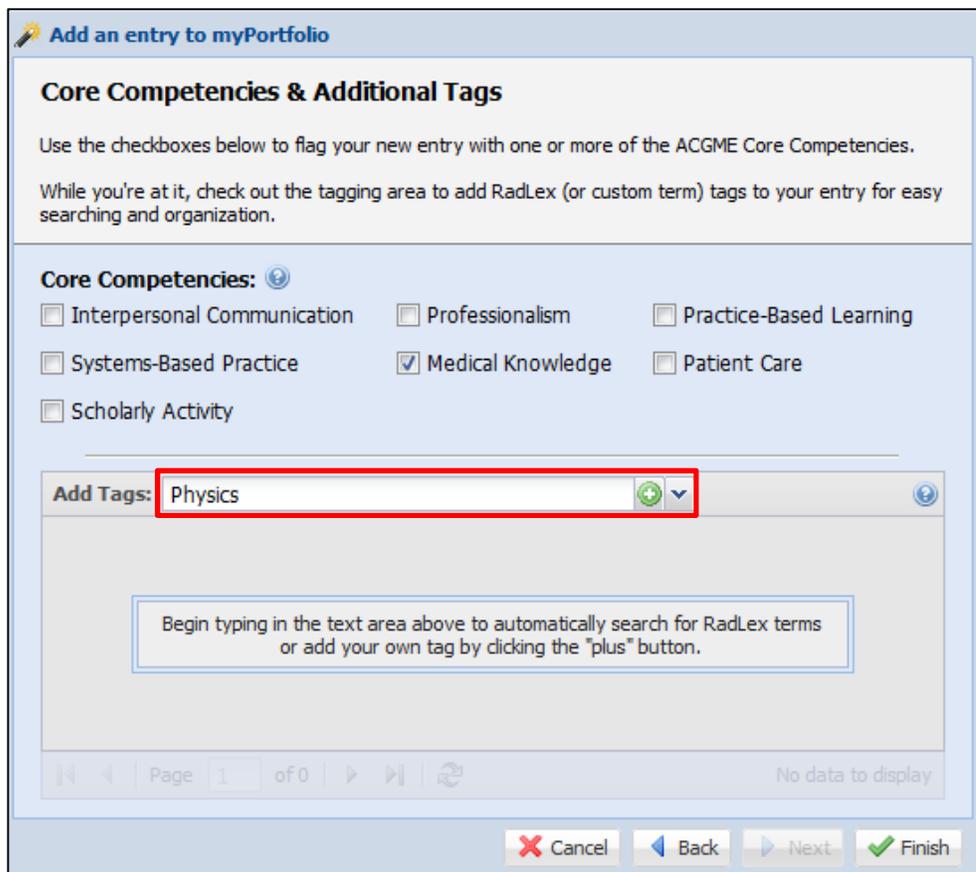
**Add Tags:** Enter your tags here... ⓘ

Begin typing in the text area above to automatically search for RadLex terms or add your own tag by clicking the "plus" button.

Page 1 of 0 No data to display

Cancel Back Next Finish

Or, if you'd like to add your own tag, use the "Add Tags" area to enter your tag for this file or activity. Press the green plus button to add this tag to your file or activity.



**Add an entry to myPortfolio**

### Core Competencies & Additional Tags

Use the checkboxes below to flag your new entry with one or more of the ACGME Core Competencies. While you're at it, check out the tagging area to add RadLex (or custom term) tags to your entry for easy searching and organization.

**Core Competencies:**

Interpersonal Communication     Professionalism     Practice-Based Learning

Systems-Based Practice     Medical Knowledge     Patient Care

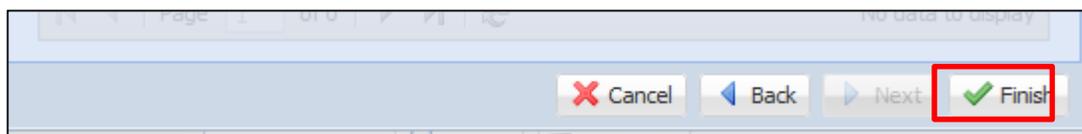
Scholarly Activity

**Add Tags:**

Begin typing in the text area above to automatically search for RadLex terms or add your own tag by clicking the "plus" button.

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8. Once you have assigned tags to your file or activity, click "Finish".



9. Your file or activity will be added to myPortfolio and will appear at the top of your "News Feed". To view the activity or file you just uploaded, visit the "Resources" section of myPortfolio.