Objectives

- Offer a free, convenient, and customizable method for personal case logging from a mobile device that is not overly burdensome.
- Allow fellows/PDs to monitor case participation as the trainee advances
- Record intra operative findings as a personal log with confidence in knowing that no third party has access
- Facilitate early identification of potential gaps in training so adjustments can be made
- Evaluate differing perceptions of case participation between the fellow and faculty
- Satisfy credentialing requirements and applications for privileges at surgical facilities.
- Fulfill the requirement for certification by the AUPO-FCC

Important Links

Link to sample data entry on a mobile device or other:

https://forms.office.com/Pages/ResponsePage.aspx?id=UFzSnhogM0m-bea-HYWPK0XwuFygaytCmE97fsP_UKdURVZQUFgwSlBRRVlDQ005UlZHWUZaUlRUQi4u

Link to modify form and sync to your own Excel workbook:

https://forms.office.com/Pages/ShareFormPage.aspx?id=UFzSnhogM0m-bea-HYWPK0XwuFygaytCmE97fsP_UKdUNTJZMDJUOFVRTDE3UEhYQkJGVlRTRVNaUS4u&sharetoken=0ZqL8QS3qLC89EIDCiC9

Link to “Getting Started” Instructional Video:

Microsoft OneDrive

1drv.ms

Link to analysis formulas for AUPO logging:

AUPO Fellow Case Log Analysis Formulas - ASRS Link.xlsx

1drv.ms

Getting Started

Follow the steps to get started though there are multiple pathways of accomplishing this. A link to a 5-minute introductory video can be found above. Alternatively, a fellow can set this up independently and share the data as requested by the PD.

1. Open the link to modify the form and click “Duplicate it”.
2. Sign in or create a Microsoft® account.
3. Modify the list of attending surgeons for your program and make any other desired changes.
4. Click on the upper left menu bar to open the app launcher and select “forms".
5. Make copies of the form within OneDrive. Open each copy and edit the top field for each fellow.
6. Verify the copies contain your modifications. Click “preview” on menu bar to input a test case.
7. Click on “collect responses”.
8. Select “copy link” and email to the fellow so they can begin logging.
9. Select “view responses”. Note this will not be functional until a first case or a test case is logged by selecting “preview” (see step No. 6).
10. Click on the tab “Open results in Excel”.
11. Click on “File” and select “share” from the drop-down menu to share with the fellow.
12. Repeat steps 8 through 11 for each unique fellow’s copy.

Tips and pitfalls to avoid

- Make sure the spreadsheet is connected and synced to the form when viewing.
- Share the link found below to the analysis spreadsheet with each fellow so they can easily count procedures.
- Use the analysis spreadsheet to aggregate the data from each of your fellow’s spreadsheets if you would like to establish benchmarks for your program.
- Fellows, do not share the link to your individual form.
- PDs, make sure you are sharing a unique copy of the form for each unique fellow.
- You can continue to input data directly into the spreadsheet and bypass use of the form when needed. You can use this method to also copy and paste

  “favorites”, or recurring procedures.

FAQs

Will others see any personal notes regarding a case? Only those with access to the spreadsheet can see entries including any personal notes. Protected health information should not be entered.

Will I need a separate log to satisfy third party entities for credentialling? No. The purpose of this method is to allow fellow trainees a method to keep a surgical log that is useful for their own growth that can also double as a satisfactory log that is easily exported (as Excel or CSV file) to a third party as needed for future credentialling. Any column containing data that is not necessary, such as private comments or details of case participation can be deleted prior to export of the spreadsheet file.

Can I use a mobile device to log cases? Yes. Microsoft® forms is a quick way to accurately populate an Excel spreadsheet. You can save a link to your home screen for quick access.

How do I edit entries? You can save the entry for editing at the time of filling the form for a case. If you discover a mistake or think of an edit later then you edit directly on the spreadsheet.

Why not just use a spreadsheet as I or others have always done? The use of forms allows uniform data entry to aid in easier searching on the analysis sheet. Forms entry has many applications such as collecting survey data. It is only a suggestion and has the additional advantage of allowing quick use from a mobile device. Direct entry onto the synced spreadsheet is still possible but may not be as efficient and is more susceptible to entry error. However, if there are multiple cases that are similar you may wish to copy the row containing the case and paste as many times as needed. You can set up a list of "favorites" in this manner on a separate sheet and paste to bypass use of the form altogether.

What is the cost of this service? There is no cost.

Who owns or monitors my data? You do and no one will have access to the data unless you share a link to the spreadsheet to which the form is synced.

How do I recover lost data? As with any important file it is recommended you download your spreadsheet from time to time and keep a backup copy.

Does a user need to answer every question on the form?

Only certain questions are required to advance to the next question. This can be adjusted according to the personal preference of the program director(s) or user. The requirement of a

response(s) and choices are fully customizable. You can make the structured data as granular as desired. Some may choose to use "other" categories and free type responses while some prefer check boxes, or a mix of both.

Does this method of case logging help satisfy the requirements of the AUPO? The available analysis sheet is set up to automatically count procedures which are currently required by the AUPO. Using the form as is to enter the data will help avoid the need to manually count procedures at the end of fellowship. Alternatively, you can adjust your own formulas to accommodate any modifications on the form.

Is there a way to collaborate with other programs to establish benchmarks or compare data?

Yes, but only if the analysis spreadsheet is shared. This system of logging is fully customizable for the program and individual user. However, uniform formats between one or more programs would allow easier comparison of aggregate data should this be a future goal.

How do I distribute the form as a fellowship director? Do I create a master and then share the link with our fellows for them to fill out?

First, duplicate the form and change the list of attending doctors. Make copies and rename each copy for each unique fellow within your program. Share the link for each form with each unique fellow. The fellow should not share their link with anyone else. Keep a master so you can create additional unique copies for subsequent fellows.

Can I allow each fellow trainee to personalize their own form?

Yes. The fellow would duplicate the form for their own use and make changes according to their personal preference including what questions are designated as a requirement, added or deleted altogether. No one would see the spreadsheet synced with the form unless this user shares the link. This is certainly acceptable but makes comparison across users potentially more complex depending on the amount and type of changes made the individual fellow user. The formulas on the analysis sheet may need to be changed as well depending on what type of changes are made in the form.

Does each fellow have a link to their own form and spreadsheet?

Yes, and they should not share the link. As a PD it is recommended to keep a master copy to help with organization and future use. You will also keep the form for each individual fellow on your OneDrive account. You can view individual fellow responses by opening each form and clicking on the synced spreadsheet. Once they have started making entries you can open the saved spreadsheet. Make sure to share a link to the spreadsheet so the fellow can track their progress as well and make any necessary edits.

Does this mean they can also access the master form and see the results too?

Users will not see the results that are generated from the form until you share the link to the spreadsheet. The spreadsheet will continue to sync with the form. Both you and the fellow can view the results in real time. The fellow can edit the spreadsheet if needed. It is also recommended that you and the fellow download a copy of the spreadsheet to keep as a backup.

Can other fellowship teachers see the form results?

You can allow others to see the results only by sharing a link to the spreadsheet.

How do I distribute the form as a PD? Do I create a master and then share the link with our fellows for them to fill out?

First, duplicate the form and change the list of attending doctors. Make copies and rename each copy for each unique fellow within your program. Share the link for each form with each unique fellow. The respective fellow should not share their link with anyone else. Keep a master so you can create additional unique copies for subsequent fellows.

Does each fellow have a link to their own form, and would it be housed on my account?

Keep a master copy on your account to help with organization and future use. You will also keep the form for each individual fellow on your account and provide the link to each fellow. You can view their individual responses by opening each form and selecting the excel spreadsheet. Alternatively, you can turn the whole process over to the fellow and have them send you the link to the spreadsheet to check progress from time to time.

Can the trainee access see the results too?

The fellow will not see the results that are generated from the form you modify until you

share the link to the spreadsheet. The spreadsheet will continue to sync with the form. Both you and the fellow can view the results in real time. The fellow can edit the spreadsheet as needed. It is also recommended that you and the fellow download a copy of the spreadsheet to keep as a backup.

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