New Innovations (RMS)
Evaluations – Managing Distributions Training

MMCGME
Metro MN Council on Graduate Medical Education

2023

Table of Contents

Evaluation Status Icons 3
Adding Manual Matches to Evaluations 3
When to use Manual Matches: 3
How to spot a Manual Match: 4
Add Manual Matches 4
How is the rotation that populates in a manual match determined? 5
Prompt Automatic Matches in Past Intervals 5
Creating Matches on Past Intervals 6
Risks 6
How-to 6
Changing an Evaluation's Available or Due Date 7
Editing an Evaluator's Completed Evaluation 8
Sending a Declined Evaluation Back to the Evaluator 9
Viewing Evaluation Match & Automated Email History 10
Open Match History 10
History Tab 10
Automated Email History Tab 11
Printing a Pending Evaluation 12
Sending Completed Evaluations Back to Evaluators for Editing 13
Return a Completed Evaluation 13
Releasing Evaluations from 'On Hold' 14
Troubleshooting Matches 15
Check the Block Schedule 15
Check the Session 15
Rematch your Session 15
Beware of Creating Duplicate Matches 16
Viewing Completed Evaluations 16
Viewing Declined Evaluations 18
Viewing Delinquent Evaluations 19
Viewing High/Low Scores 20
Viewing 'On Hold' Evaluations 21
Viewing Evaluations with Pending Signatures 22

Viewing Comments to the Program Director 23

Evaluation Status Icons

These are the evaluation status icons used in Session manager to show the status of each evaluation match.

	Complete
	Complete, Released, Can be put back 'On Hold'
	Complete and Missing Signature
	Complete, Missing Signature, Can be put back 'On Hold'
	Declined
	Delinquent
	Delinquent, Saved as Draft
	On Hold
	Pending
	Saved as Draft

Adding Manual Matches to Evaluations

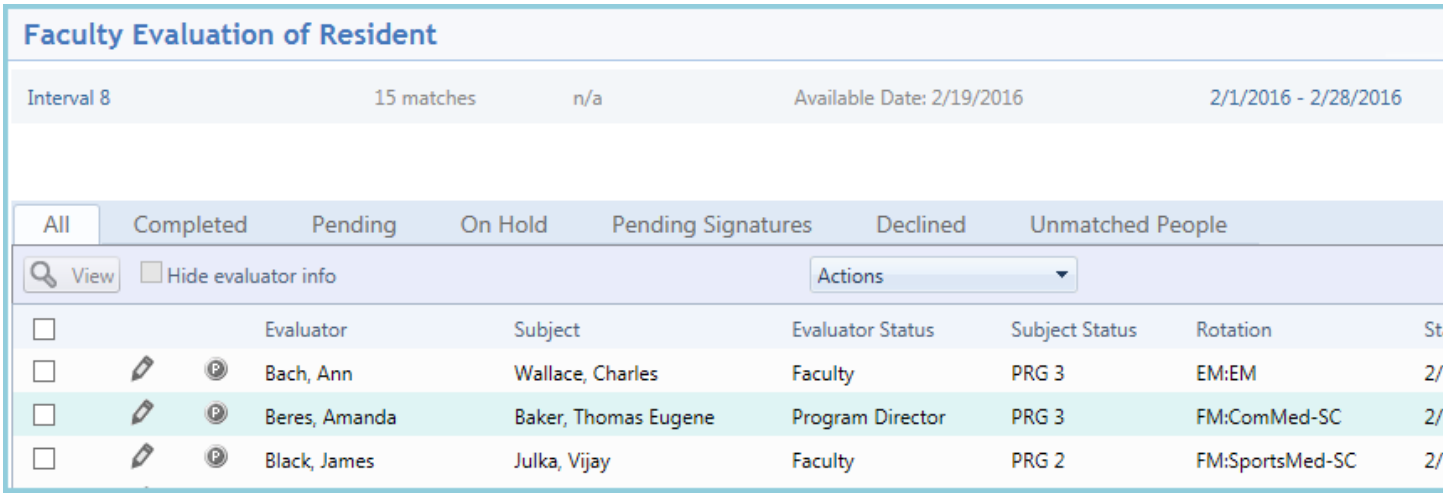
After you've created your evaluation distribution session, you can rely on it to create automatic matches. Alternatively or additionally, you can create matches manually.

When to use Manual Matches:

- When a subject or evaluator is not on the block schedule
  Automatic matching relies on block schedules
- When the evaluations you're distributing don't align with rotations
  For example: quarterly, annual, semi-annual learner review of faculty
- At your discretion, instead of or in addition to any automatic matches

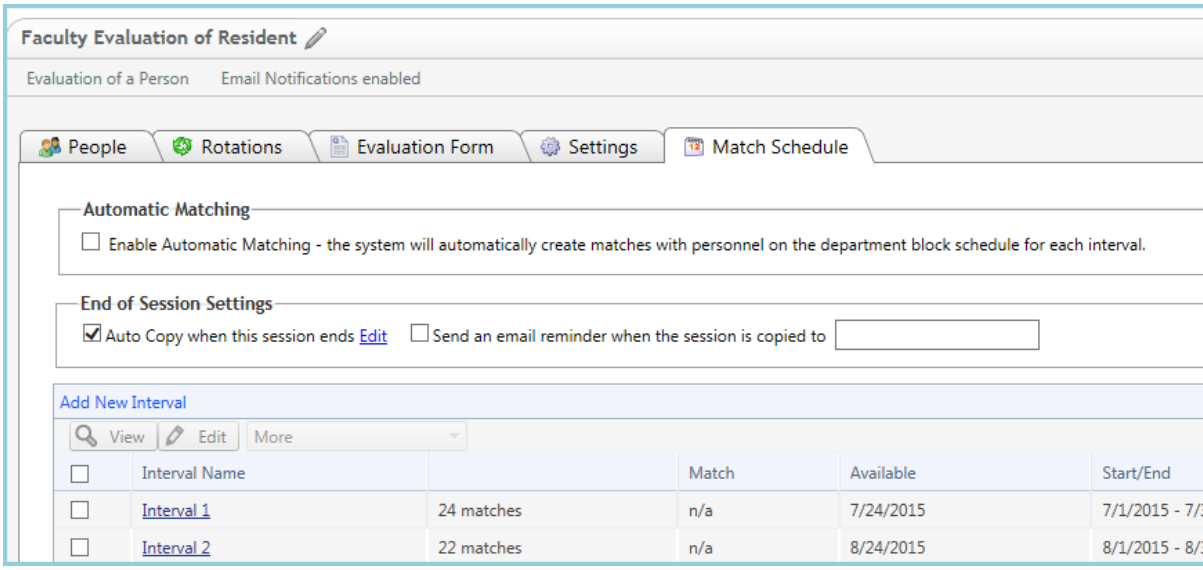
How to spot a Manual Match:

- Manual matches have an aqua background on the match page
- Automatic matches have a white background

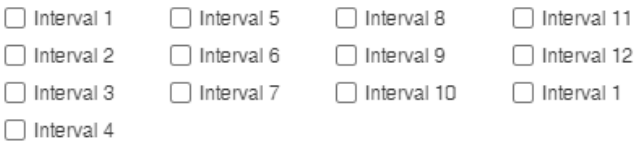


Add Manual Matches

1. Go to **Evaluations** > **Sessions Manager**
2. Click on the session where you want to add matches
3. Go to the **Match Schedule** tab
4. Add matches to one or multiple intervals:
    - Add to one interval:
        a. Click on the interval name
        b. Click **Add Match** in the upper right corner
    - Add to multiple intervals—*not available for evaluations of programs*:
        a. Click **Add Matches to Intervals**



5. Select evaluators on the left and subjects on the right
    - To include people from other departments:
      (learners in the session's department and any learners on a rotation in the session's department during the selected interval appear by default)
        a. Click **Filter**
        b. Select a department
        c. Click **Update Results**
    - To view more people than those designated on the People tab, check **Show all personnel**
6. Choose an option for **Match selected people to each other**:
    - For most evaluation types: select **excluding themselves**
    - For self-evaluations: select **only to themselves**
7. If you chose to add matches to multiple intervals, check which intervals you want
   You won't see these checkboxes if you're adding matches to a single interval



8. Check the email notification box to send an alert to evaluators
   You'll only see this option if the interval is in the past
9. Click **Preview** to view the matches and make edits, as needed. Click Save.
10. Click **Create Matches** to create the matches and go back to the match page

How is the rotation that populates in a manual match determined?

1. The system tries to find a rotation common to the evaluator and subject pair during the time frame of the interval that is also included in the Active Rotations in the session
2. If there is no common rotation or the common rotation is not in the Active Rotations, it will populate the Subject's rotation
3. If the subject is on more than one rotation, the system will look at the first one in the Active Rotations list that is on the subject's schedule
4. If the session can't find any rotation that meets these credentials, it will populate N/A.

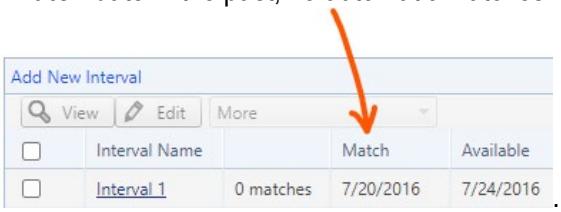
Prompt Automatic Matches in Past Intervals

Sometimes a session is made a few months into an academic year. If automatic matching is enabled, matches will be made in all future intervals. However, the system will not go into the past and make the matches for prior intervals.

For more information about conference set up go to Help>Tutorial Videos>Evaluations [8.12 Evaluations-Matching

Creating Matches on Past Intervals

If you create an interval with a **Match** date in the past, no automatic matches will be created for that interval



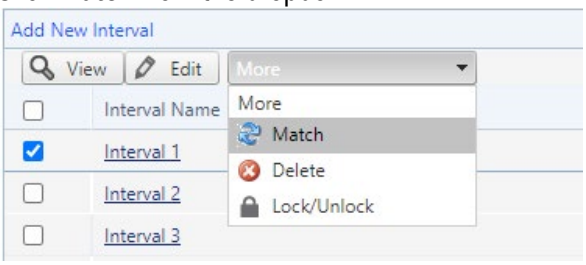
If you want matches (evaluations) for intervals with past match dates, you can rematch select intervals.

Risks

- If you've already deleted or manually edited any matches in a re-matched interval, they will be recreated in their original form.
- You'll re-send emails for old matches if:
    a) The evaluator didn't complete the previous evaluation
    b) You checked the option to send emails for old matches

How-to

1. Go to **Evaluations** > **Session Manager**
2. Click on the name of the session
3. Click the **Match Schedule** tab
4. Check the box(es) of the past intervals
5. Click **More**
6. Click **Match** from the dropdown



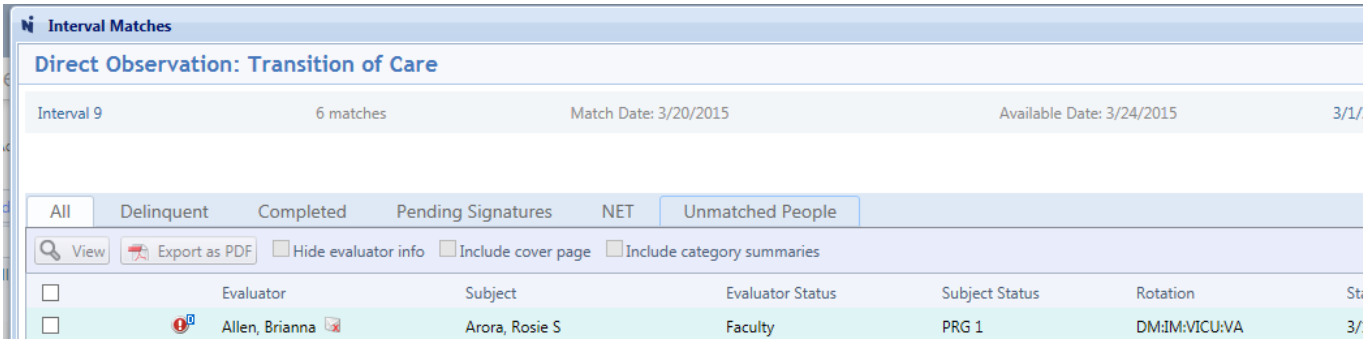
7. The system checks the block schedule for those intervals and makes matches between evaluators and subjects
8. Click the name of an interval to view the individual matches that were made

Changing an Evaluation's Available or Due Date

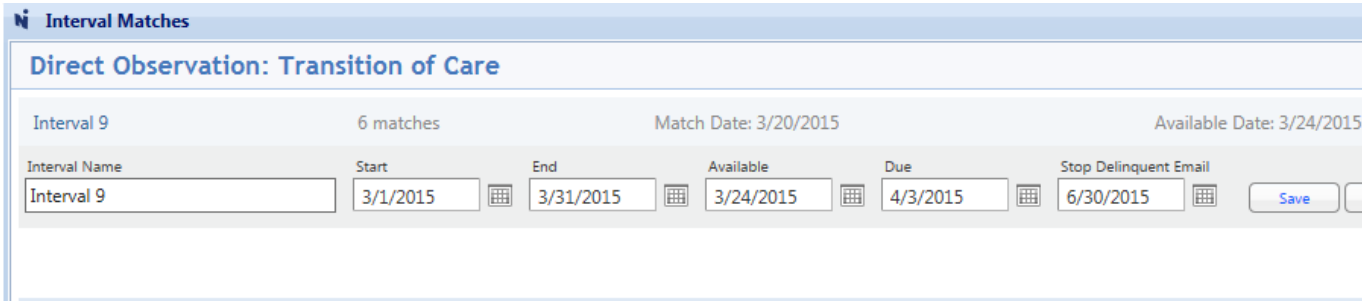
Once a session is created and matches are made, changes to either the Available Date or Due Date cannot be made to all intervals at once. They have to be made interval by interval. There is not a way to apply differing available or due dates to matches. All matches appearing within an interval have the same Available Date and Due Date.

To change any of these dates:

1. Go to **Evaluations** > **Session Manager**
2. Click on arrow to the left of the session name
3. Click on the Interval name
4. Click **Edit Interval**



5. Change the dates
6. Click **Save**

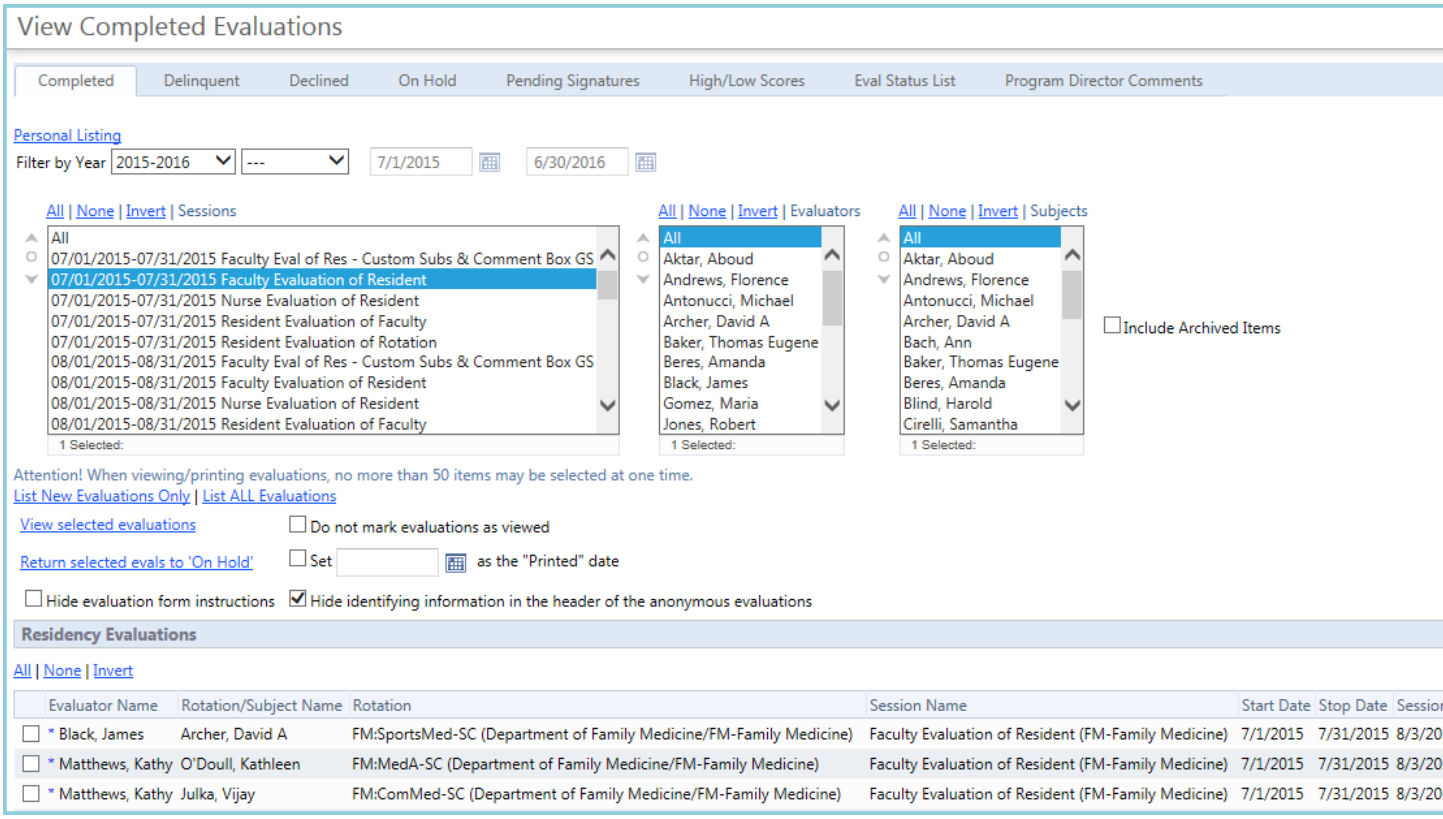


Editing an Evaluator's Completed Evaluation

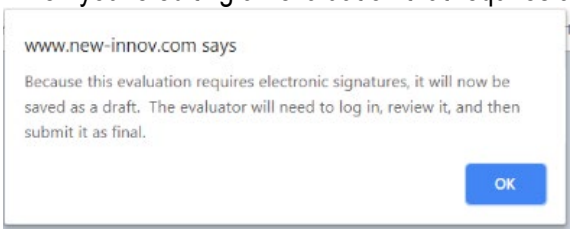
Sometimes an evaluator will ask an administrator to make changes to a completed evaluation on their behalf. After following these steps, the evaluation will be saved. The completed evaluation will then display the name of the administrator, plus the date and time that the evaluation was saved.

Make Edits for Evaluator

1. Go to **Evaluations** > **View Evaluations**
2. On the 'Completed' tab, choose your Evaluator and Subject from the lists
3. Click **List All Evaluations**
4. Click **Edit Evaluation** beside the appropriate match (right column)
5. Click **OK**
6. The evaluation will open. Make the necessary edits.
7. Click **Submit Final**



When you're editing an evaluation that requires a signature, you'll see this message:



If the evaluator was a signer:

- They will see the form marked as draft on their Home Page
- They will get an email prompting them to sign

If the subject was a signer:

- They will get a home page notification

Sending a Declined Evaluation Back to the Evaluator

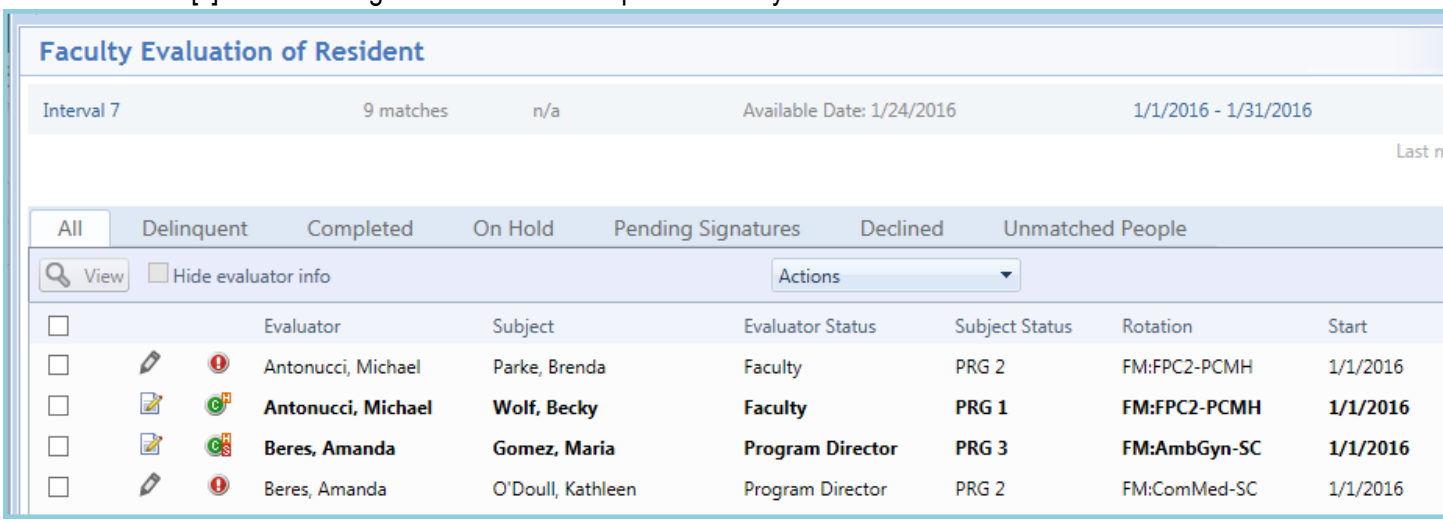
1. Go to Evaluations > View Evaluations
2. Click the **Declined** tab
3. Select the desired academic year
4. Select the session, evaluator and subject
5. Click **View List**
6. Check the box in front of the evaluations to send back
7. Click **Return Evaluation**

NOTE: Once a declined evaluation is returned, it cannot be declined by the evaluator for a second time.

Viewing Evaluation Match & Automated Email History

Open Match History

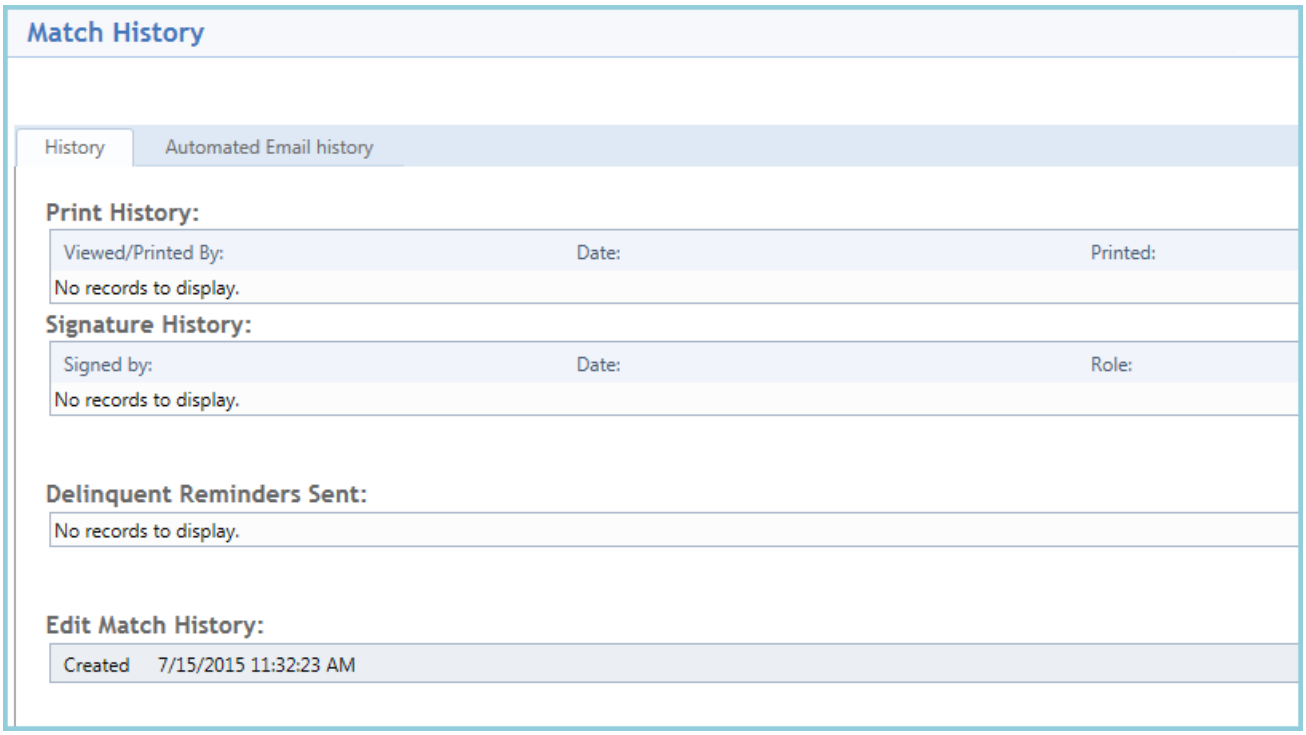
1. Go to **Evaluations** > **Session Manager**
2. Click on your session
3. Click the **Match Schedule** tab
4. Click the interval name. This opens all the matches for that interval
5. Click the [i] icon to the right of a match. This opens a history for that match



History Tab

You'll see:

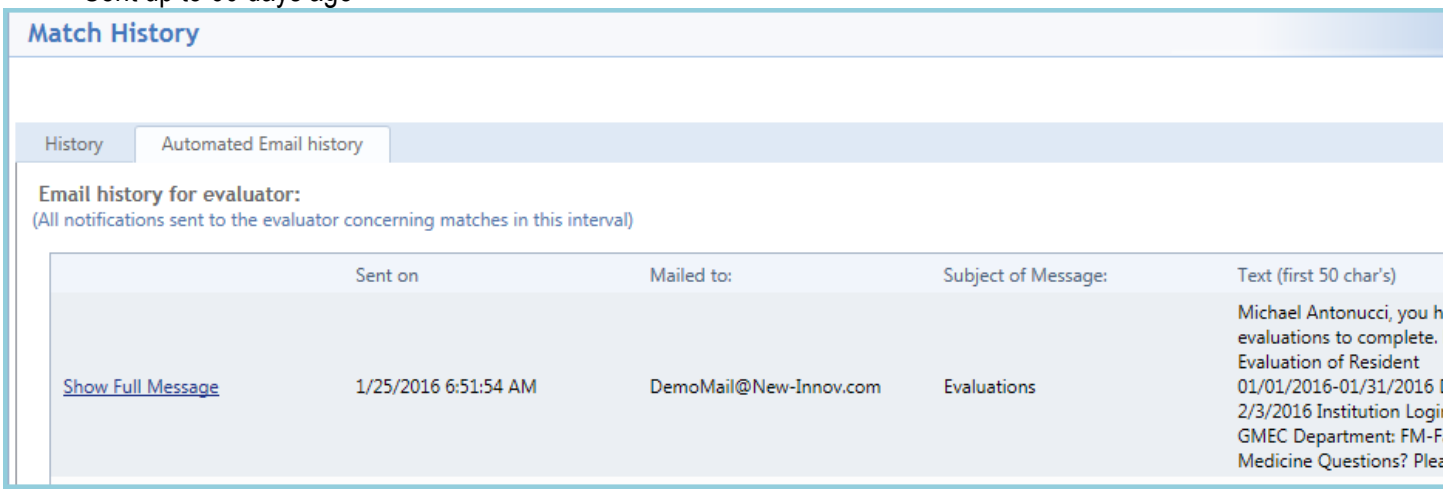
- Print History
- Signature History
- Delinquent Reminders Sent
- Edit Match History



Automated Email History Tab

Here, you'll find emails that were:

- Generated by the system
- Related to the match
- Sent up to 60 days ago

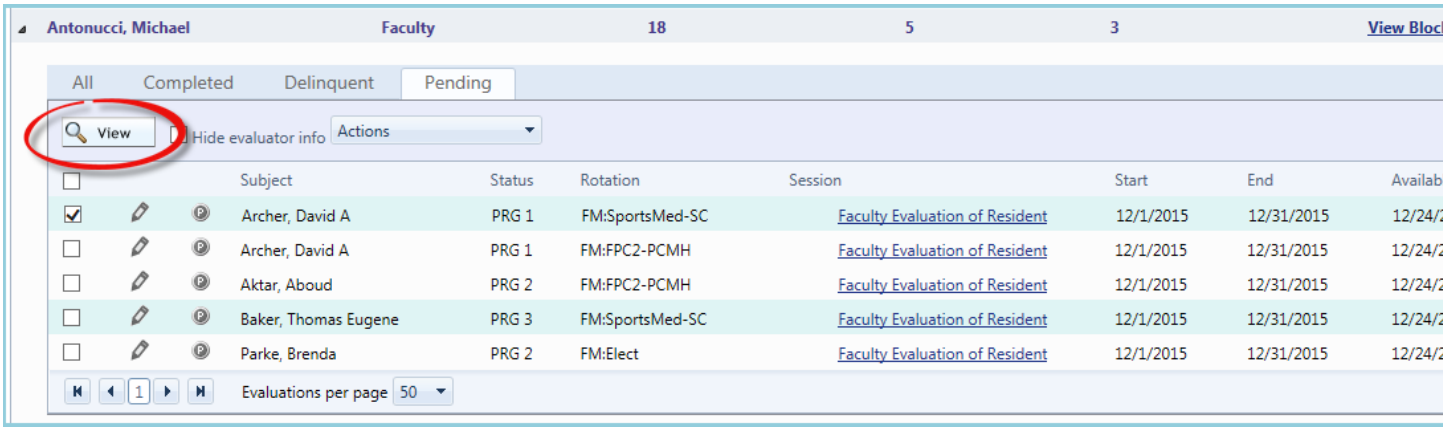


Printing a Pending Evaluation

After a match has been made, you can print pending evaluations from the Session Manager.

Print a Pending Evaluation

1. Go to **Evaluations** > **Session Manager**
2. Select a tab:
   - Sessions: Click the arrow to the left of the session name and select the interval
   - By Evaluator, By Subject, or By Rotation: Click the arrow to the left of the name and click the Pending tab
   - By Date: Click the Pending tab
3. Locate the desired evaluation and place a check in the box to the left
4. Click **View**. This will open the evaluation.
5. Right-click and select **Print**

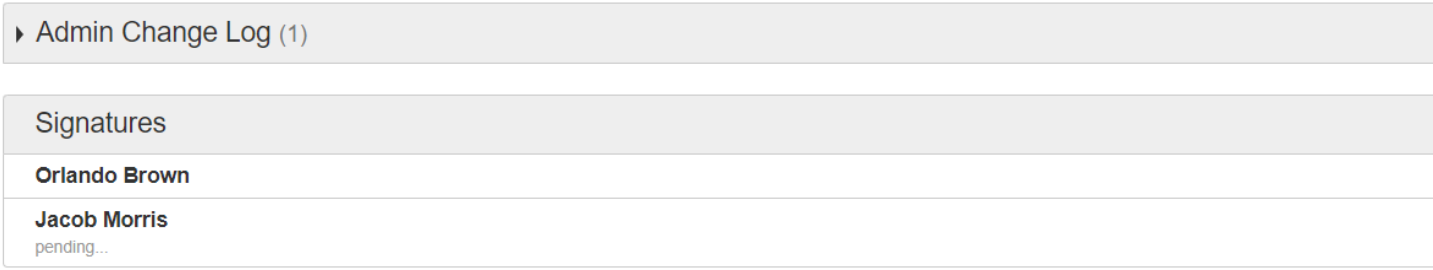


Sending Completed Evaluations Back to Evaluators for Editing

If an evaluator needs to edit a completed form, an administrator can return the completed evaluation to them.

Return a Completed Evaluation

1. Go to **Evaluations** > **View Evaluations**
2. On the **Completed** tab, choose your Evaluator and Subject from the lists
3. Click **List All Evaluations**
4. Click **Edit Evaluation** beside the appropriate match (right column)
5. Click **OK**
6. The evaluation will open. Scroll to the bottom and click **Return to Evaluator**

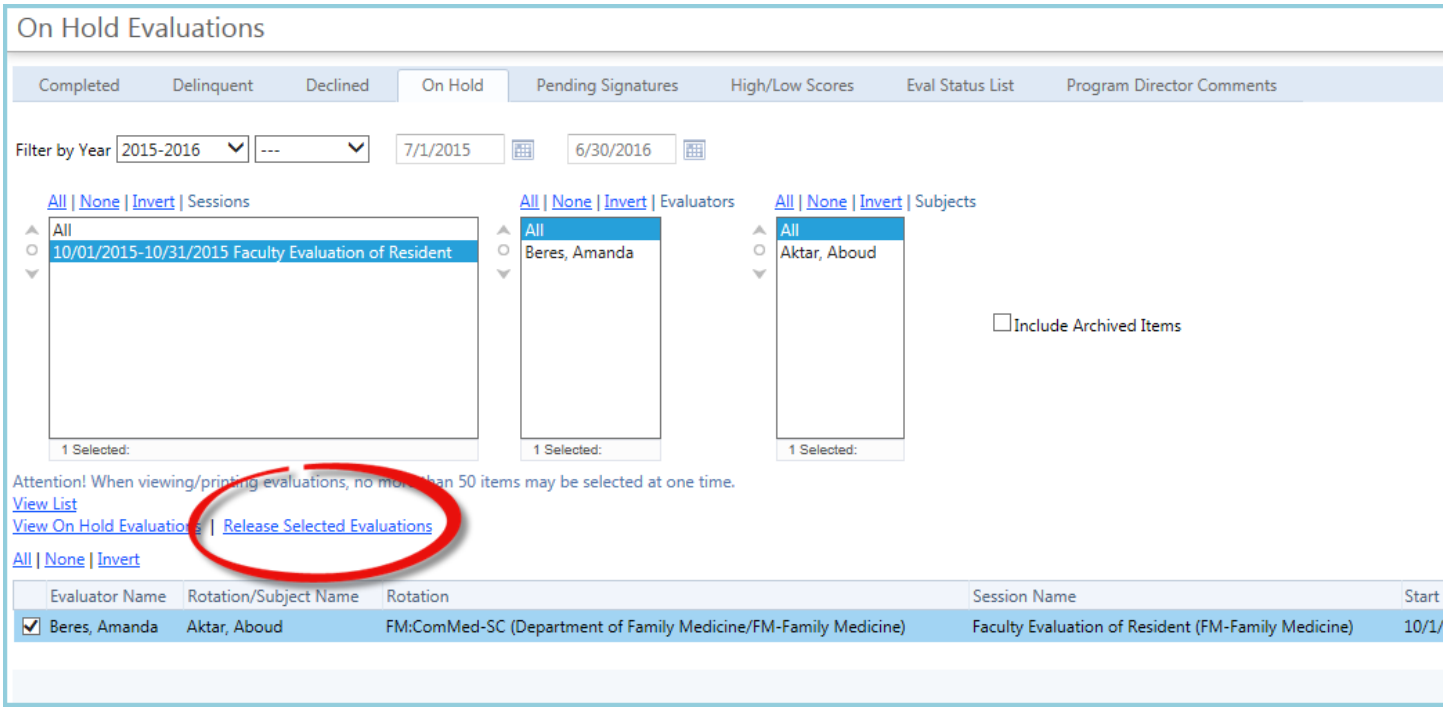


The evaluation is now in draft mode and appears in the evaluator's list of evaluations to complete. The evaluator can log in to New Innovations and edit the evaluation.

Releasing Evaluations from 'On Hold'

You can place completed evaluations 'On Hold' for administrative review. Here's how to release them when ready:

1. Go to **Evaluations** > **View Evaluations**
2. Click the **On Hold** tab
3. Select the desired academic year
4. Select the session, evaluator and subject
5. Click **View List**
6. Check the box in front of the evaluations to release
7. Click **Release Selected Evaluations**



When you release an evaluation:

- Any pending signers are notified of required signatures
- Both evaluators and subjects can see the completed evaluation in their list (unless blocked by session anonymity settings)
- The evaluation's results become available in all reports

Troubleshooting Matches

When troubleshooting any problems with your matches, you'll find a lot of problems are rooted in your Block Schedule and your Session

Check the Block Schedule

- Check that both the Evaluator and Subject are on the Block Schedule
- Be sure both are on the exact same rotation
- Check the time period or intervals
- Confirm that the status type for both Evaluator and Subject is correct on the Block Schedule

Check the Session

- Be sure that the correct Status Type is included on the People tab of your session
- Check that the rotation is included in the 'Active Rotations' box on the Rotations tab of your session
- Confirm that the rotation ends during the interval of the session
- If the Evaluator or Subject is from another department, be sure that you've 'Included People from Outside Departments' on the People tab of your session

Rematch your Session

Once you update your session or block schedule, be sure to **rematch** the interval. This tells the software to check the block schedule and session again and make new matches.

To rematch a single interval:

1. Go to **Evaluations** > **Session Manager**
2. Click the name of a session
3. Click the **Match Schedule** tab
4. Select an interval
5. Click **Match Interval**

To rematch more than one interval:

1. Go to **Evaluations** > **Session Manager**
2. Click the name of a session
3. Click the **Match Schedule** tab
4. Check the boxes in front of the intervals you want to rematch
5. From the '**More**' drop-down list, click **Match**

Beware of Creating Duplicate Matches

Duplicate matches will not be created, except in two cases:

- The session is marked as Totally Anonymous and people have completed evaluations. Since the evaluator information is permanently stripped away in Totally Anonymous evaluations, the system does not know who completed these evaluations and will make new ones. Evaluators can return the extra evaluation as 'Declined.'
- Manual matches were made and are the same as the matches made automatically by the system.

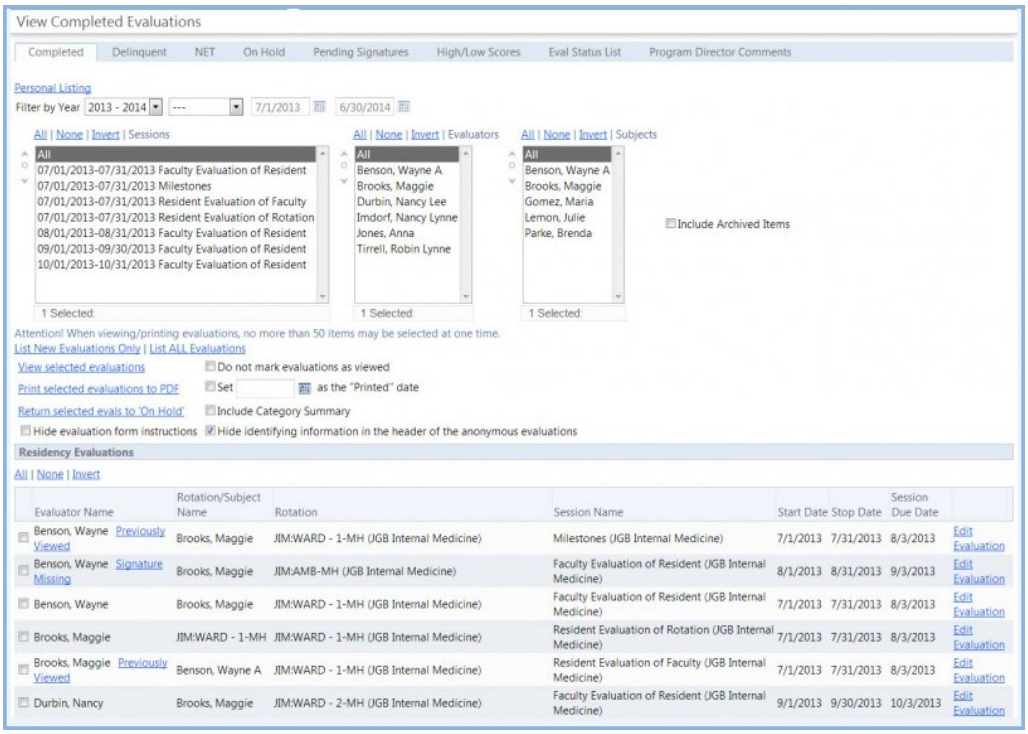
Viewing Completed Evaluations

Who can view completed evaluations?
Level 6 - view in all departments
Level 5- view in department where privileged
Level 4 - view only evaluations that are not on hold or anonymous
Level 3-1 - view only evaluations done on them or they have completed

View Completed Evaluations

1. Go to **Evaluations** > **View Evaluations**
2. By default, you'll be on the **Completed** tab viewing the Administrative Listing
    - To only view evaluations you've completed, click **Personal Listing**
3. Select the date range
4. Select the Session
5. Select the Evaluators
6. Select the Subjects

7. Click **List All Evaluations**

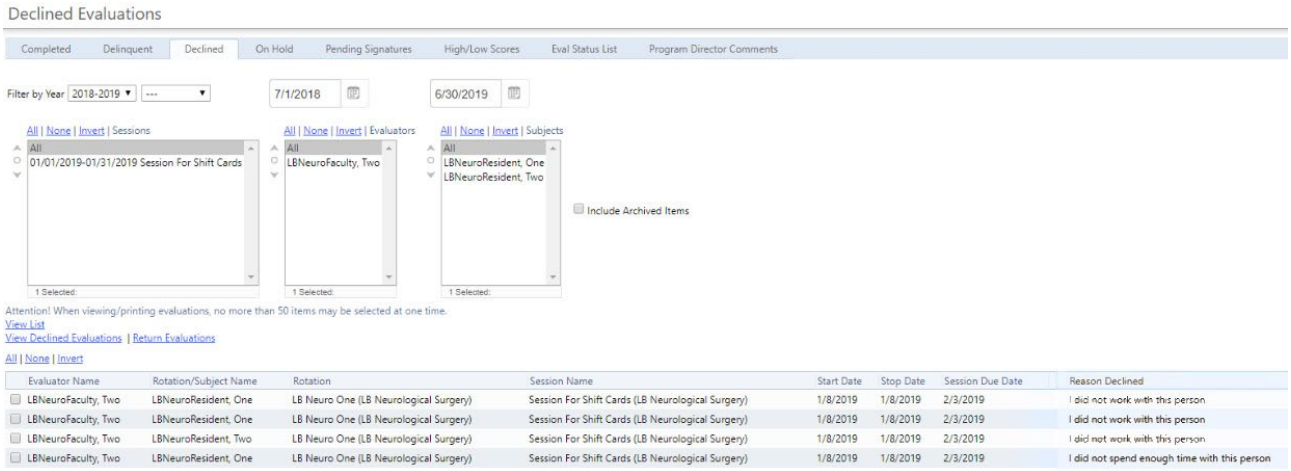


8. In the last column, click Edit Evaluation to make changes to the completed evaluation
   You'll see:
   - Evaluations that are "Totally Anonymous" cannot be edited
   - Evaluations marked with a red asterisk are on hold
   - Evaluations marked with a green asterisk were placed back on hold after being automatically released and can now only be released manually
   - Evaluations marked with a blue asterisk can be placed back on hold
   - Evaluations followed with a green (RS) belong to a reciprocal session and were completed with an existing reciprocal match
   - Evaluations originating in another department cannot be put on hold from your department
   - Leaving the session list defaulted to "All" will include evaluations completed on or by people in your department
   - No anonymous evaluations will be displayed when selecting only one evaluator OR selecting all but one evaluator and you are a subject
   - There must be at least two completed evaluations on the subject, in a session marked as Subject Anonymity or Total Anonymity, for the evaluation to appear. This protects the anonymity of the evaluators.

Viewing Declined Evaluations

You can view the evaluations that have been returned or 'Declined' by the evaluators.

1. Go to **Evaluations** > **View Evaluations**
2. Click the **Declined** tab
3. Select your date range
4. Select your Session
5. Select your Evaluators
6. Select your Subjects
7. Click **View List**

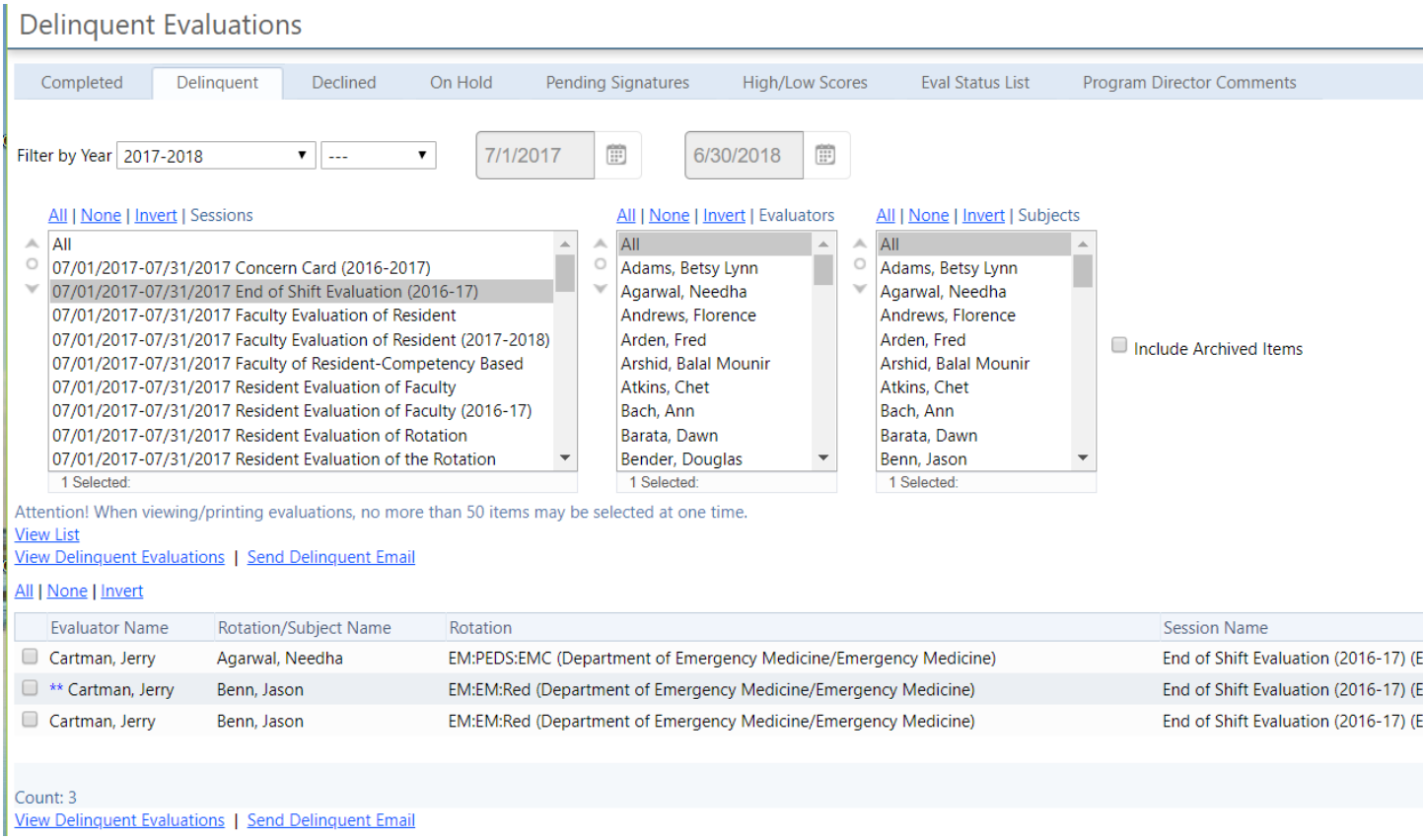


- Check the box in front of a match and click View Declined Evaluations to open the evaluation and view it
- Check the box in front of a match and click Return Evaluations to send the evaluation back to the evaluator to be completed. The evaluator will not have the option to return (decline) it again.
- The session list contains only sessions in this department. Results may include sessions outside of your department if they involve evaluators/subjects from this department
- The last column displays Reason Declined. This column will allow admins to report on historical declined reasons and perhaps recognize trends that lead them to improving compliance. For more info on where Decline Reasons come from, check out this article for evaluators declining an Evaluation.

Viewing Delinquent Evaluations

Delinquent evaluations are those assigned to evaluators that are past their Due Date. Evaluations are considered 'delinquent' if they are not completed by midnight of the day they are due. Administrators also have the option to send delinquent emails from this page to the evaluators.

1. Go to **Evaluations** > **View Evaluations**
2. Click the **Delinquent** tab
3. Select your date range
4. Select your **Session**
5. Select your **Evaluators**
6. Select your **Subjects**
7. Click **View List**



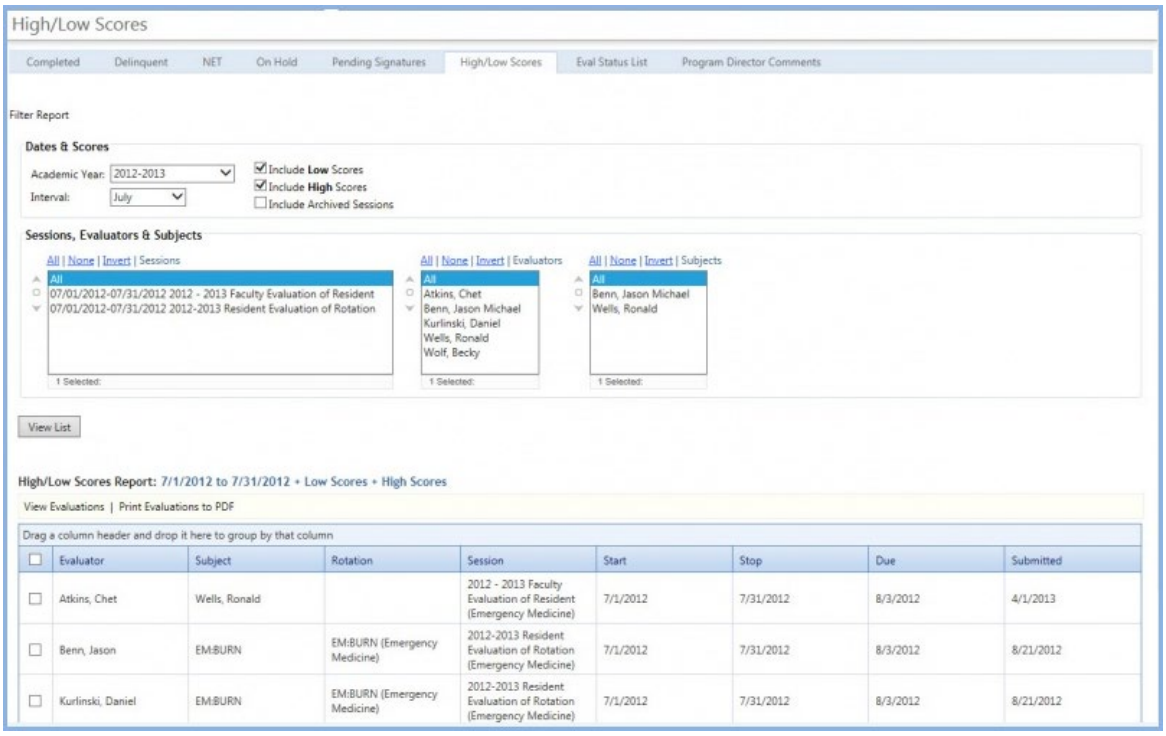
Notes:

- Check the box in front of an evaluation and click **Send Delinquent Email** to send a reminder to the evaluator.
- Evaluations marked with ** are saved as a draft.
- Evaluations marked with an 'A' are from an administrative session and cannot be completed by the evaluator.

Viewing High/Low Scores

View the high and low scores received by subjects as configured in your evaluations.

1. Go to **Evaluations** > **View Evaluations**
2. Click the **High/Low Scores** tab
3. Select your **Academic Year**
4. Select your **Interval** (Optional)
5. Check the box to **Include Low Scores**
6. Check the box to **Include High Scores**
7. Check the box to **Include Archived Sessions**
8. Select your **Session**
9. Select your **Evaluator**
10. Select your **Subject**
11. Click **View List**



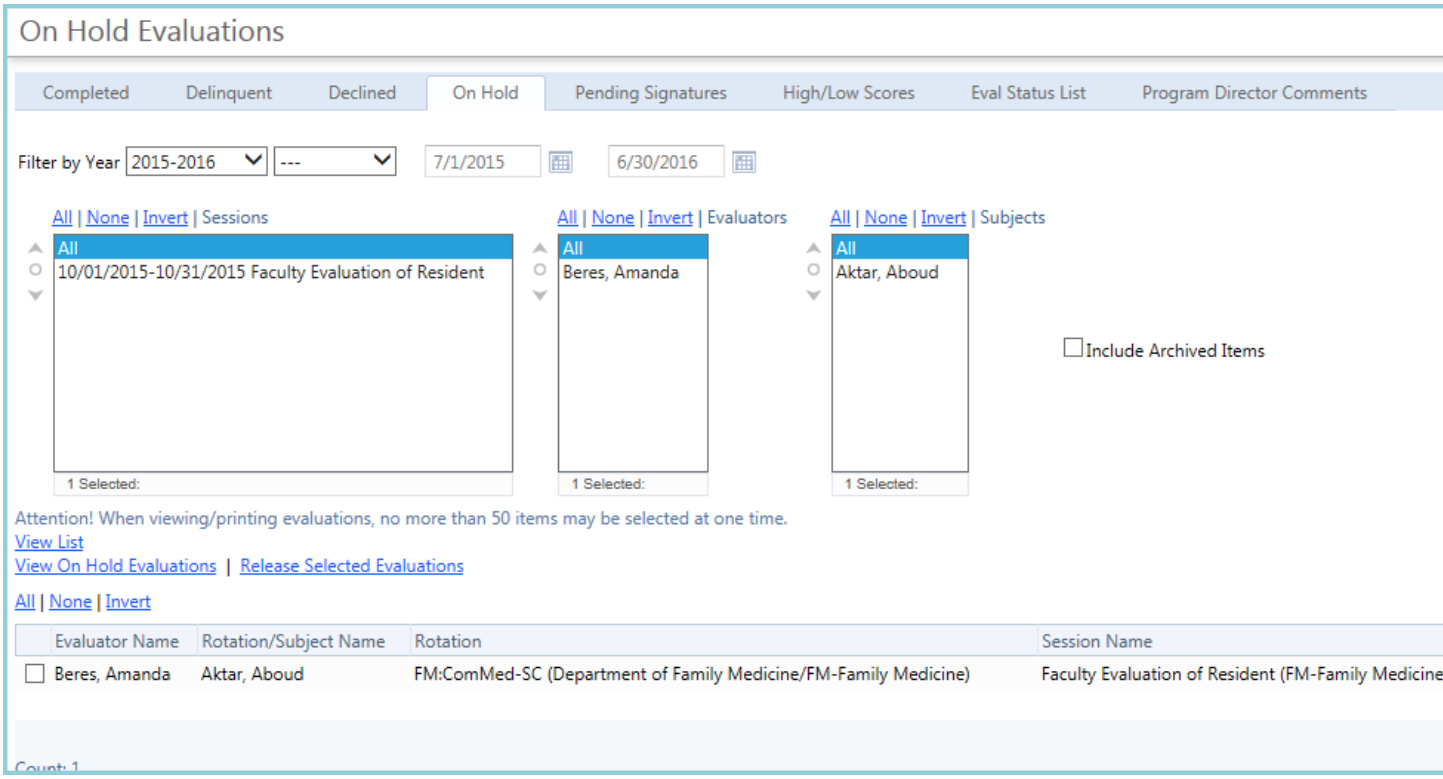
Notes:

- Click View Evaluations to open the evaluation for viewing
- Click Print Evaluations to PDF to print your evaluation to a PDF format
- When viewing evaluations, high and low scores are indicated in red
- Evaluations marked with a red asterisk (*) are on hold
- Anonymous evaluations are not displayed when viewing single evaluators
- There is no auto login link in a high or low score notification. This is for security and confidentiality reasons.

Viewing 'On Hold' Evaluations

Within a session's Advanced Settings, administrators can place completed evaluations 'On Hold' for administrative review. Those evaluations can be viewed and released from 'On Hold' from this screen.

1. Go to **Evaluations** > **View Evaluations**
2. Click the **On Hold** tab
3. Select your date range
4. Select your **Session**
5. Select your **Evaluators**
6. Select your **Subjects**
7. Click **View List**



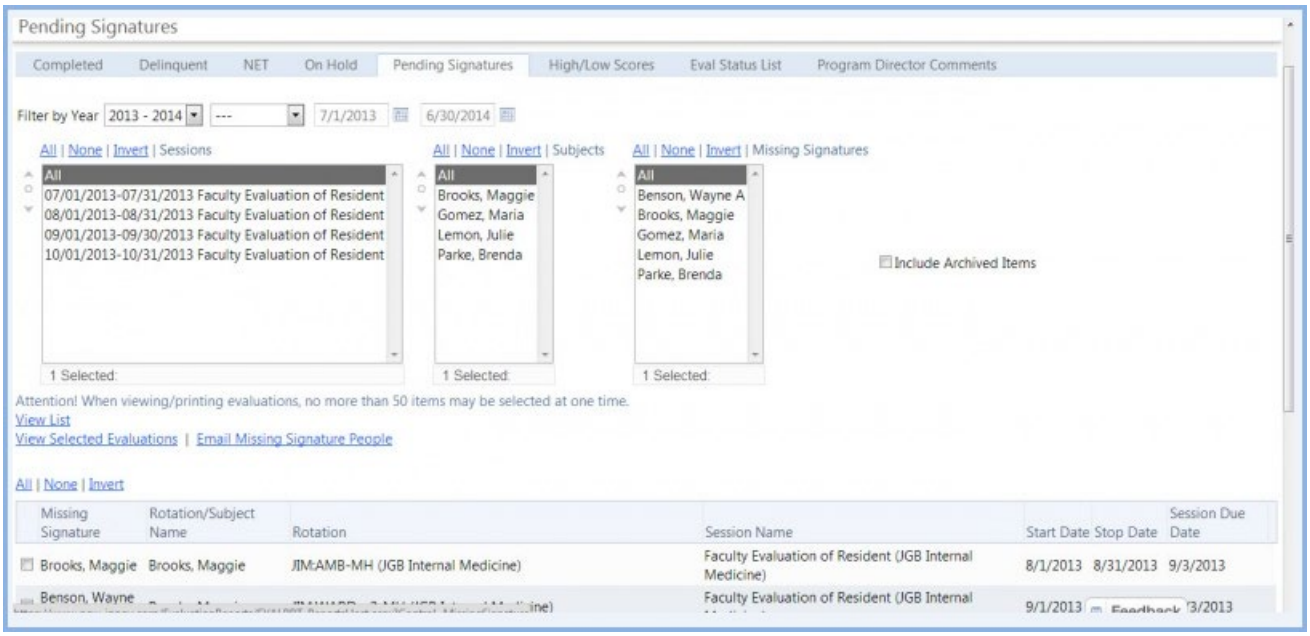
Notes:

- Check the box in front of a match and:
- Click View On Hold Evaluations to open the evaluations and view them.
- Click Release Selected Evaluations to release the evaluations from being 'On Hold' and allow it to be viewed by other according to the configuration of the session.
- Evaluations followed with a green (RS) belong to a reciprocal session and were completed with an existing reciprocal match.
- Evaluations originating in another department must be released from that department regardless of your privilege level in evaluations.
- No anonymous evaluations will be displayed when selecting only one evaluator OR selecting all but one evaluator and you are a subject.

Viewing Evaluations with Pending Signatures

View the evaluations that have been completed and are waiting for additional signatures.

1. Go to **Evaluations** > **View Evaluations**
2. Click the **Pending Signatures** tab
3. Select the date range
4. Select the **Session**
5. Select the **Evaluators**
6. Select the Subjects
7. Click **View List**



To send an email to a person:

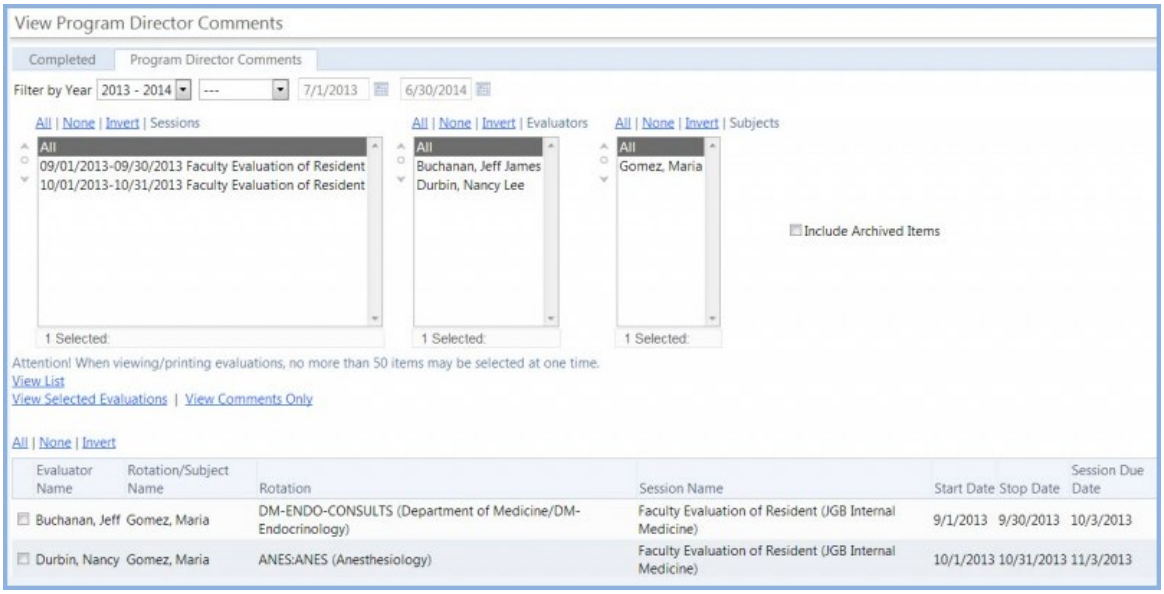
1. Check the box beside the name
2. Click **Email Missing Signature People**
3. This page can be filtered by date, session, evaluator and subject
4. Select people to CC or BCC on this email
5. Enter a subject line
6. Enter the body of the message
7. Click Send

Viewing Comments to the Program Director

These comments collected on evaluation forms are only viewable by the program director.

Program directors:

1. Go to **Evaluations** > **View Evaluations**
2. Click the **Program Director Comments** tab
3. Select your date range
4. Select your **Session**
5. Select your **Evaluator**
6. Select your **Subject**
7. Click **View List**



Notes:

- Check the box in front of an evaluation and click View Selected Evaluations to view the entire evaluation and comments
- Check the box in front of an evaluation and click View Comments Only to see just the comments submitted.