2017

New Innovations (RMS) Evaluations Training

Metro Minnesota Council

on Graduate

Medical Education

RMS Evaluations Module Training

Evaluation Forms

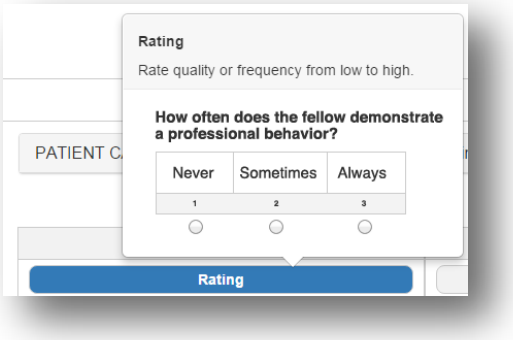
CONTENTS

CREATE A NEW FORM

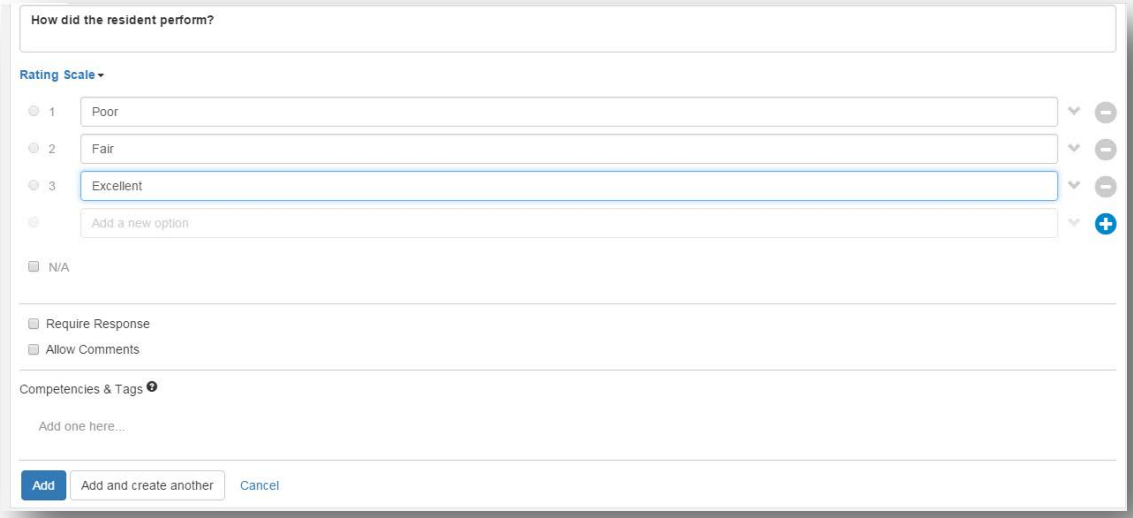
1. Go to *Evaluations > Evaluation Forms > Add New*
2. Click radio button for Create a new evaluation on the Edit Tab (Default)
3. Enter the **Internal Name**. Required. This is the name administrators will see when building a session to distribute the form, so abbreviations can be used. Be sure to use a name that describes what the form is for, such as Faculty Evaluation of Resident or Resident Evaluation of Rotation so you can quickly to identify the correct form when sending it out
4. Enter the **Title**. Required. This is the 'official' name of the form, the name that will appear for the evaluator and on reports.
5. Enter a **Subtitle** (optional). The subtitle appears beneath the Title when displayed.
6. Add **Instructions** for the evaluator: Character limit is 750. (line breaks are allowed in text)
7. Choose to have Overall Comments **on** or **off**
8. Click **Continue**
9. Click **Add a Component** and choose an option

ADD QUESTIONS

GENERAL: RATING

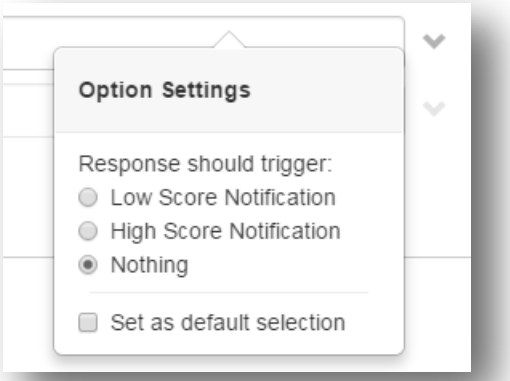


1. Click on **Add Component**
2. Click the Rating button



3. Enter the question text
4. The default grade scale is 1 – 3. Enter a label for each value.
5. To add more options, click the blue plus sign or use the tab key
6. To remove an option, click the minus sign at the end of the row.
7. The values reset themselves automatically when you add or remove a choice Grade

Scale Options - Option settings are available for each choice in the grade scale

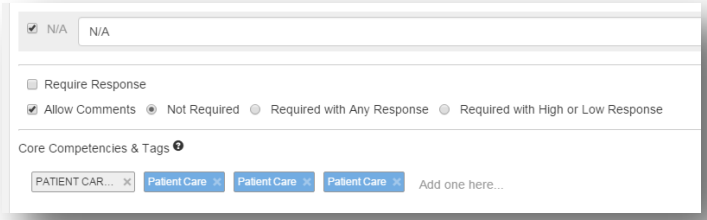


Trigger a Low Score Notification: when this option in the grade scale is chosen, a notification is sent to a selected person. When selected, the options arrow changes to red to as an indication low score notification had been enabled.
Trigger a High Score Notification: when this option of the grade scale is chosen, a notification is sent to a selected person. When selected, the options arrow changes to green to as an indication high score notification had been enabled.
Set as Nothing: none of the options above are configured for this response
Set as the default selection: When the evaluator sees this question, the default value will be selected. Only one default selection can be selected per grade scale. If you select one value as the default, then change the default to

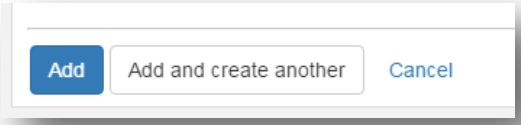
another value, it removes the setting from the first selection.

Additional question settings

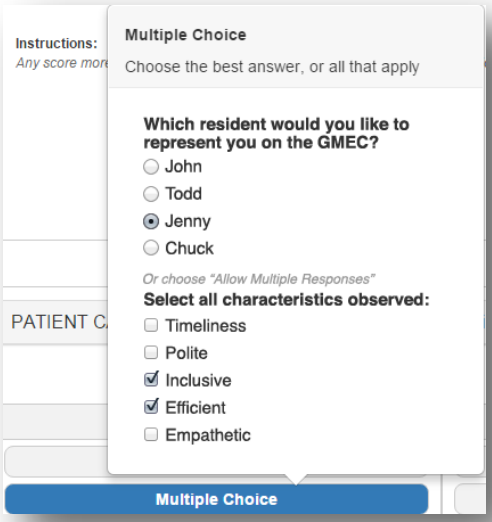
- N/A – Check to let the evaluator mark the question N/A. The N/A label can be edited
- Require Response – Check to require a response to this question from the evaluator. If the question is not answered, the evaluator cannot submit the form as complete.
- Allow Comments – When soliciting comments, you can make them
  - Not required
  - Always Required with any response
  - Required with High/Low Response. Evaluator has to explain why they gave the high or low score
- Core Competencies & Tags
  - Click 'Add one here'
  - Select a Core Competency or Milestone Subcompetency or type in a custom tag
  - Click Done



8. Click **Add** or **Add and create another** which will duplicate any options selected.



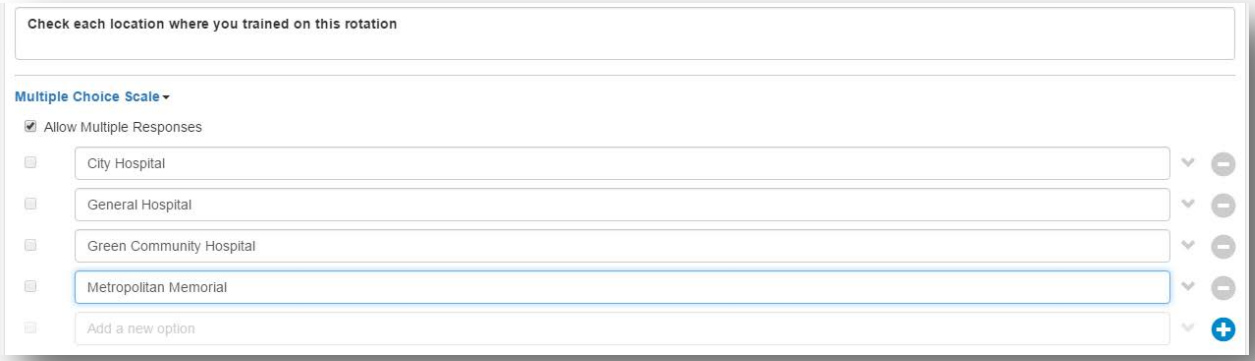
GENERAL: MULTIPLE CHOICE



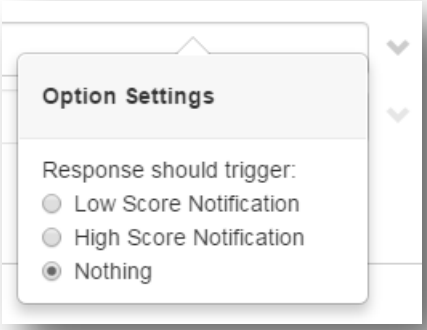
1. Click on **Add Component**
2. Click the Multiple Choice button

To create 'Allow Multiple Responses ' type

1. Enter the question text
2. **Check** box to allow Multiple Responses
3. Cannot make this scale required or N/A (grayed out)
4. Enter the choices (labels)



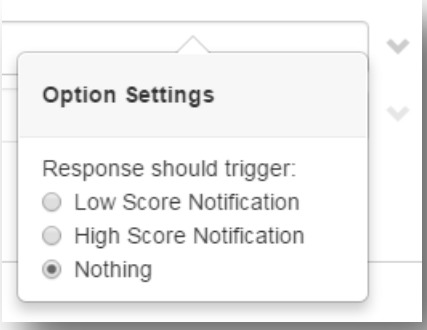
5. To add more choices, click on the blue plus sign or use the tab key
6. To remove a choice, click the minus sign at the end of the row.
7. The values reset themselves automatically when you add or remove a choice
9. Grade Scale Options



To create 'Choose correct response' type

1. Enter the question text
2. **Do not check** box to Allow Multiple Responses
3. Enter the choices (labels)

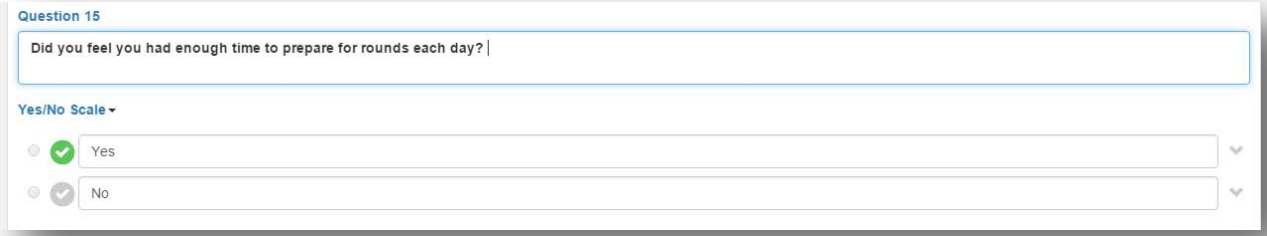
4. Click on the blue plus sign or use the tab key to add more choices
5. Click the minus sign at the end of the row to remove a choice
6. Grade Scale Options



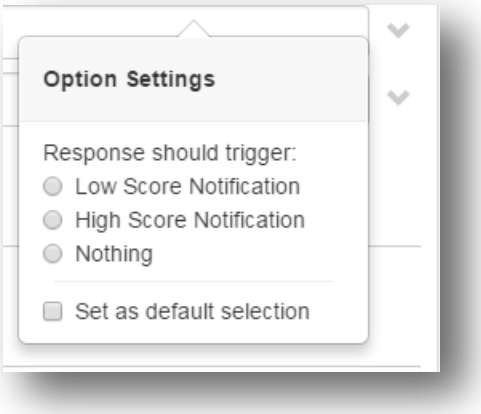
7. Additional question selections
    - Allow Comments – When soliciting comments, you can make them
        - Not required
        - Always Required with Any Response
        - Required with High or Low Response. Evaluator has to explain why they gave a high or low score
    - Core Competencies & Tags
        - Click 'Add one here'
        - Select a Core Competency or Milestone Subcompetency or type in a Custom Tag
        - Click Done
8. Click **Add** or **Add and Create Another** which will duplicate any options selected.

GENERAL: YES/NO

1. Click on **Add a Component**
2. Click on Yes/No
3. Enter question text
4. Enter the labels for Yes and No
5. Click the radio button by the green arrow to indicate the positive response

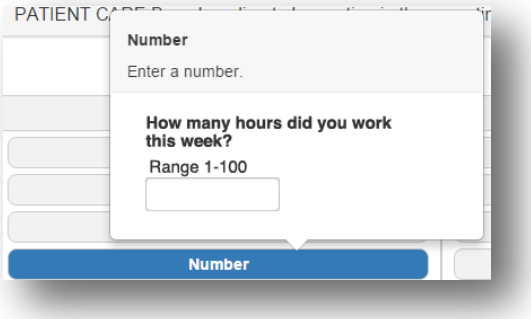


6. Grade scale options:

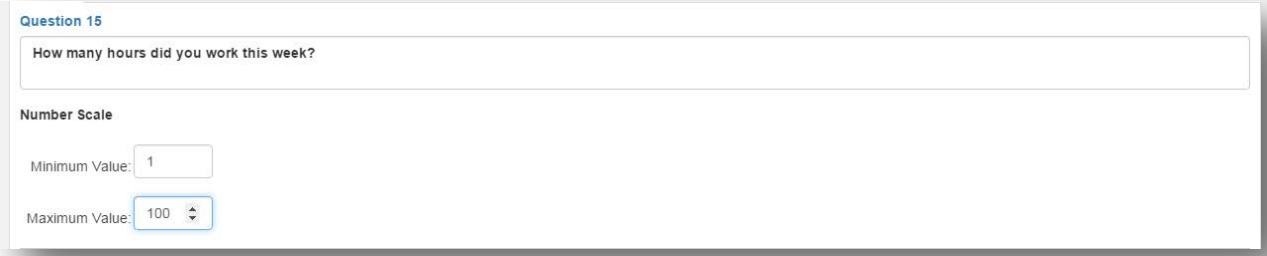


7. Additional question selections
   - Allow Comments – When soliciting comments, you can make them
     - Not Required
     - Always Required with Any Response
     - Required with High or Low Response. Evaluator has to explain why they gave a high or low score
   - Core Competencies & Tags
     - Click 'Add one here'
     - Select a Core Competency or Milestone Subcompetency or type in a custom tag
     - Click Done
8. Click **Add** or **Add and Create Another**

GENERAL: NUMBER

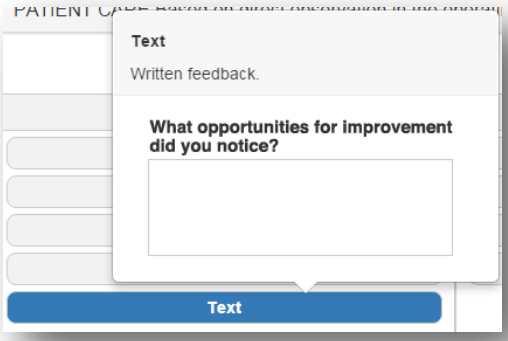


1. Click **Add a Component**
2. Click on **Number**
3. Enter the question text
4. Indicate the minimum number that can be entered by the evaluator
5. Indicate the maximum number that can be entered by the evaluator. The maximum value box may not have arrows, depending on the browser.

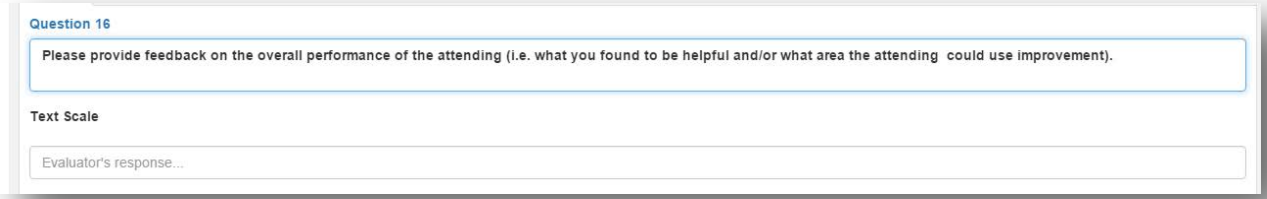


6. These options are available
   - Allow Comments – When soliciting comments, you can make them
     - Not required
     - Always Required with Any Response
     - Core Competencies & Tags
     - Click 'Add one here'
     - Select a Core Competency or Milestone Subcompetency or type in a Custom Tag
     - Click Done
7. Click **Add** or **Add and Create Another**

GENERAL: TEXT

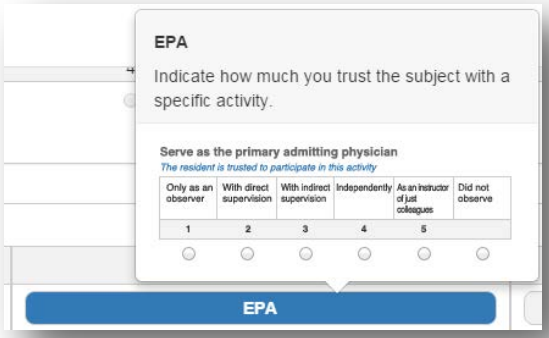


1. Click Add Component
2. Click Text
3. Enter the question text. The character limit for the response is 250.



4. These options are available
    - Allow Comments – When soliciting comments, you can make them
        - Not required
        - Always Required with Any Response
    - Core Competencies & Tags
        - Click 'Add one here'
        - Select a Core Competency or Milestone Subcompetency or type in a Custom Tag
        - Click Done
5. Click **Add** or **Add and Create Another**

SPECIALIZED: EPA



1. Click on Add Component
2. Click on EPA
3. Select from the existing EPAs or add a new one
    a. Click on Add New
    b. Enter text of new EPA
    c. Click Done
4. Choose to require response or include comments
5. Click Done

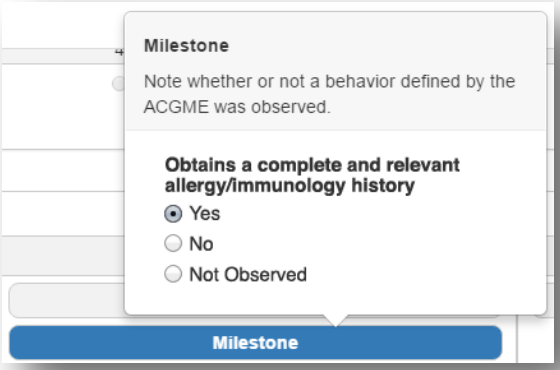
Please set up the 'Entrustment Scale' for your program prior to adding EPAs to your forms.

Edit the Entrustment Scale

A default Entrustment Scale is provided for use with EPA questions. Changes can be made to the scale, but keep in mind that each department can use 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.

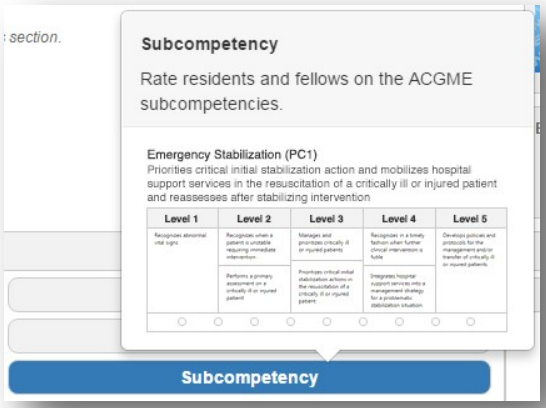
1. Go to *Evaluations > Milestones*
2. On the EPA panel, click **Configure**
3. Click **Entrustment Scale**
4. Make your changes
5. Check the box, **Include half points,** if you want additional radio buttons to display on the scale. These four extra radio buttons will not have labels.
6. Click **Save**

SPECIALIZED: MILESTONE



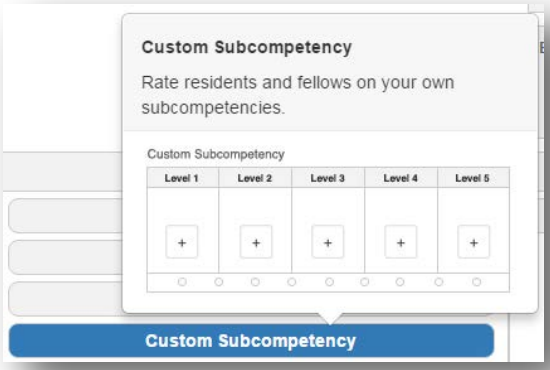
1. Click on Add Component
2. Select the milestone from the list
3. Check which milestones should appear on the form. These are selected by level.
4. Choose to require a response and include evaluator comments

SPECIALIZED: SUBCOMPETENCY



1. Click on **Add a Component**
2. Select the subcompetency to add to the form
3. Choose whether to require a response and include evaluator comments

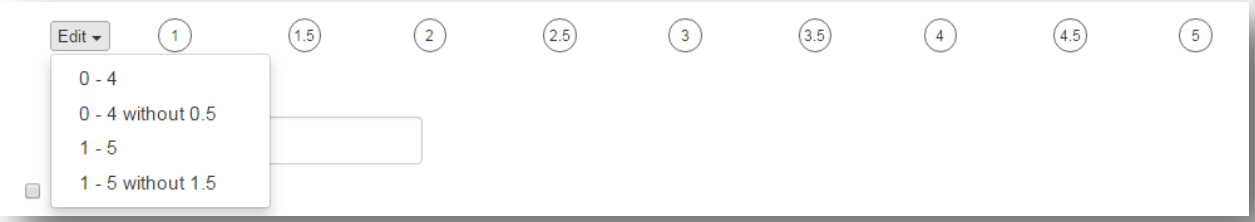
SPECIALIZED: CUSTOM SUBCOMPETENCY



1. Click on **Add a Component**
2. Click on Custom Subcompetency
3. Check subcompetencies from the list of existing custom subcompetencies or create a new one
4. Choose whether to require a response and include evaluator comments

Add new Custom Subcompetency

1. Click on **Add a Component**
2. Click on Custom Subcompetency
3. Click the **Add New** button
4. Enter a **title** for the Custom Subcompetency
5. The **header** of each level can be left as is, or edited
6. Click the **plus sign** in the first level and enter the text in the details box
7. Click **Save**
8. Continue to add as many narratives as needed for that level
9. Continue to add narratives to each level until completed
10. Click **Edit** to choose the rating scale for the custom subcompetency



11. Check to include an **N/A option**. The N/A label can be customized.
12. Check to require a response
13. Check to include comments

14. If you'd like to map this custom subcompetency to milestones, click the **Map to Milestones** button at the bottom of the page
15. Check all of the milestones this custom subcompetency should be mapped to
16. Click **Return** at the top of the page. Your changes are auto-saved
17. Click **Done** to return to the form or **Add Another** to add another subcompetency

FINISH

After all questions have been added to your form:

1. Click **Done** or
2. Click **Preview Evaluation Form** to view the text inside the template

NOTIFICATIONS TAB

Some types of questions allow you to configure high or low notifications. When evaluators choose either a high or low score and submit the evaluation, an email will be sent to individuals selected on this tab.

Questions that can be configured for high/low score notifications

- Rating
- Multiple choice
- Yes/No

1. Go *to Evaluations > Evaluation Forms > Notifications Tab*
2. Add people to be notified from the list on the left to the Send To: list on the right by clicking the blue plus icon
3. People with no email address in the software will not receive notifications. The envelope icon does not display for people who do not have an email address.
4. The subjects advisor can be notified by checking the box at the bottom of the Send To list

MILESTONE TAB

Add rotation based subcompetencies or make this form a Shift Card

Rotation Based Subcompetencies

1. Click 'Designate which subcompetencies are presented based on the resident's rotation'
2. Select a rotation to map in the rotation dropdown list
3. Check the subcompetencies to associate with the rotation
4. Click **Return** when all subcompetencies have been selected

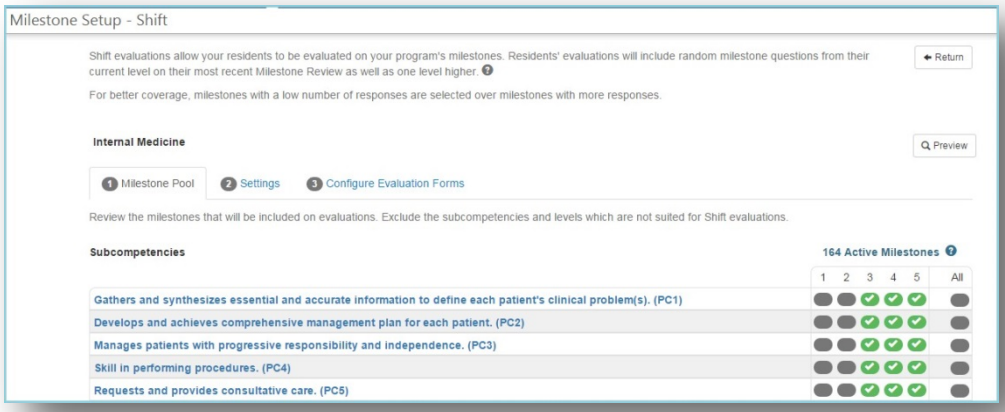
There is no need to configure evaluation forms. These rotations have been mapped to the form you are working on.

Shift Card

1. Click the link ‘Designate which milestones are presented based on the resident's program’

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:

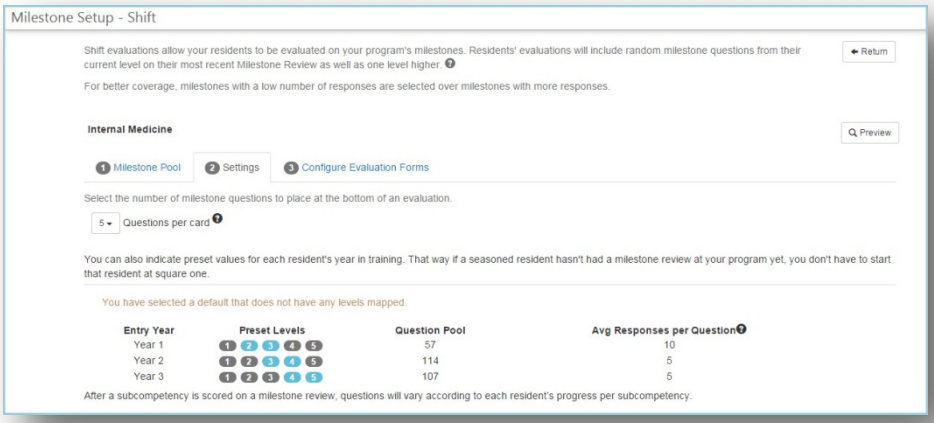
- Select or Unselect an entire level of questions. Ex: Click '5' to remove all Level 5 questions from the milestone pool.
- Select or Unselect an entire milestone. Ex: Remove PC 12 from all levels.
- Click Preview to view a sample Shift Card for each level



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 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.



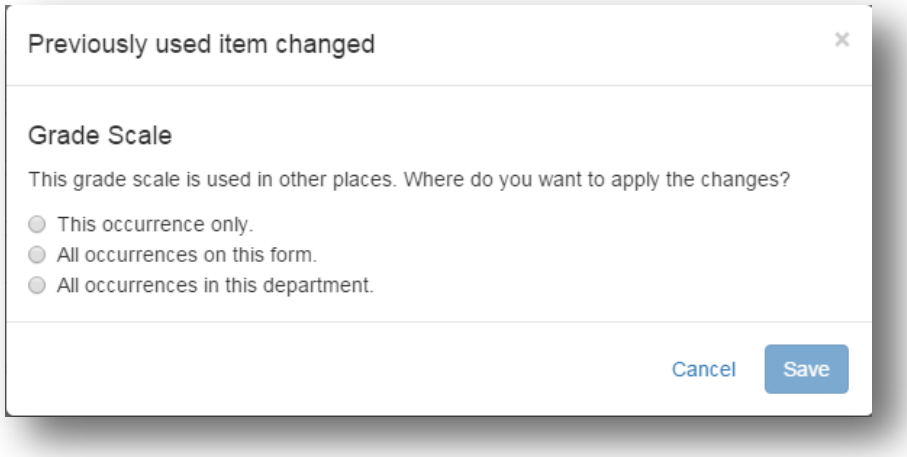
There is no need to configure evaluation forms. The shift configuration is for the form you are working on. If you want to configure other shift cards, go to *Evaluations > Milestones > Shift*

EDIT A FORM NOT IN USE

If a form has not been used in a session, any changes can be made to it. There are no limitations on editing any components.

1. Go to *Evaluations > Evaluation Forms*
2. Select **Edit** from the **Actions** dropdown to the right of the form to edit
3. Edit the **name or instructions** by hovering over the name and clicking on the section
4. Make changes and **Save**
5. Add, edit, move or delete **section divider or instructions**
6. Edit questions by hovering over the question and clicking Edit

When a question or grade scale is edited, you are presented with three choices. These choices are conditional depending on where the item is used.



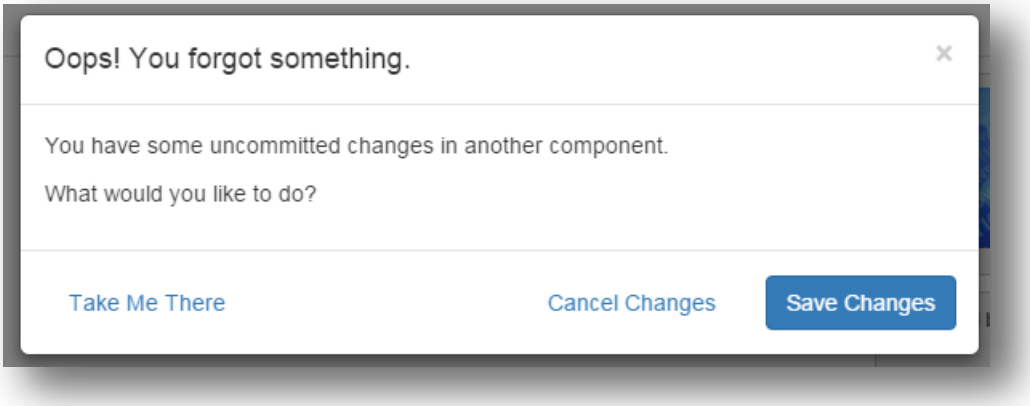
Do you want to make changes to:

- ‘This occurrence only’. Only changes this grade scale instance.
- ‘All occurrences on this form’ Changes this this grade scale for all instances on the form
- ‘All occurrences in this department’ Changes this grade scale on every form in your department where it is used

These options are conditional because they only are displayed if the ‘condition’ listed is met. For example, if the grade scale is not used on any other form in your department, you will not get the third option on the popup.

If you modify a grade scale to add or remove the number of choices, you are actually creating a new grade scale. You will not be presented with conditional options to update the grade scale in other places.

Pop up if changes are not saved:



EDIT A FORM IN USE

Editing forms is intended for correcting minor errors. It is NOT intended for changing the meaning of a question or the grade scale options. Use caution when editing questions so that you do not change the meaning of the question and when editing grade scales so that you do not add or eliminate a choice that might invalidate previous responses. Some safe guards have been put in place to warn you of the ramifications of these actions. However, the responsibility is on the user to make appropriate edits.

1. Go to *Evaluations > Evaluation Forms*
2. Select **Edit** from the **Actions** dropdown to the right of the form to edit
3. Edit the **name, title, or instructions** by hovering over the name and clicking on the section
4. Make changes and **Save**
5. Add, edit, move or delete **section divider or instructions**
6. Edit questions by hovering over the question and clicking Edit

Edit **Notifications** by clicking the Notifications Tab and adding or removing people from the Send To: list

The following **can** be edited on a form in use:

- Edit text of existing questions
- Edit text of grade scale labels including text for N/A
- Modify grade scale options (hi/low/default) except on milestones and subcompetencies
- Move the location of questions
- Edit whether comments are allowed for a question
- Toggle between comments required or not
- Edit whether the question requires a response or not
- Edit minimum or maximum values for a numeric scale
- Add or delete hi/low score configurations
- Add or delete hi/low score notification recipients
- Add, delete or modify milestone mapping
- Add or delete tags, core competencies or subcompetencies
- Change whether overall comments are required or not
- Editing the wording of an EPA changes the wording anywhere it is used

The following **cannot** be done to a form in use:

- Copy questions
- Add or delete questions
- Change the type of grade scale used for a question
- Change the number of choices for a rating scale
- Edit whether a multiple choice scale can have multiple responses or not

REPLACE FORMS IN ACTIVE SESSIONS

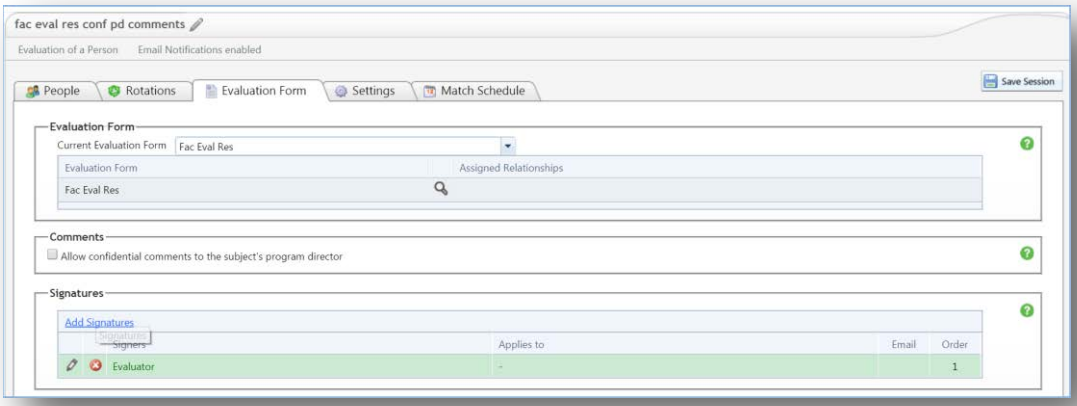
Once you've formatted your evaluation forms, go back to each session using an old form and change it to the new form.

Reminder: If you did not update a form to the new format, you do not have to replace it in a session. You can continue to use the old form, you just will not be able to edit it or use it with mobile.

Step 1. Change Form

1. Go to *Evaluations > Session Manager*
2. Click on the name of the session
3. Go to the Evaluation Form Tab
4. Select the correct form from the current Evaluation Form list
5. Click Save Changes

Note: We recommend that you add the word Revised to the title of your new form when you copied it so that in Step 4 above, you will easily recognize the name of the new form.



Step 2. Rematch the Session

1. Go to the Match Schedule Tab
2. Any interval that has been matched will have the old form attached
    - To remove the old form and assign the new one, delete all the matches and rematch the interval
    - If someone has completed the old form, you can delete the match and rematch it with the new form. This will force the evaluator to complete the new form. If you do not wish to have the evaluator complete the new form, just leave that match intact.
3. If no intervals have been matched you do not need to do anything. The system will use the new form when it creates the matches for the interval.
4. Click **Save Session**

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Creating Sessions

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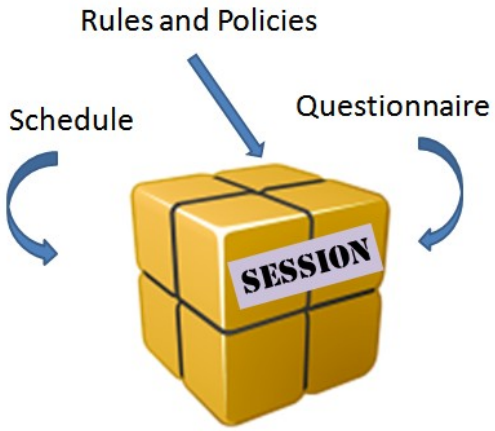
CREATING SESSIONS



- The evaluation
- Evaluators
- Subjects
- Evaluation dates
- Emails
- Signatures
- Anonymity settings

SESSION MANAGER OVERVIEW

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

Administrators can use the Session Manager to keep track of all of their evaluation sessions from one place. It can be used to:

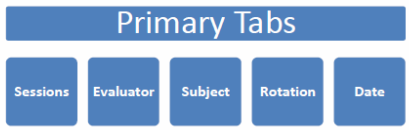
- monitor progress
- research issues
- handle administrative tasks
- facilitate the evaluation process.

The session manager uses tabs to organize all the information about your sessions. At a glance you can see your sessions, information about your matches, statistics on completion, relevant dates, and levels of anonymity. Also from the Sessions tab, you can copy your sessions, delete them, archive them, or lock them.

MONITOR SESSIONS

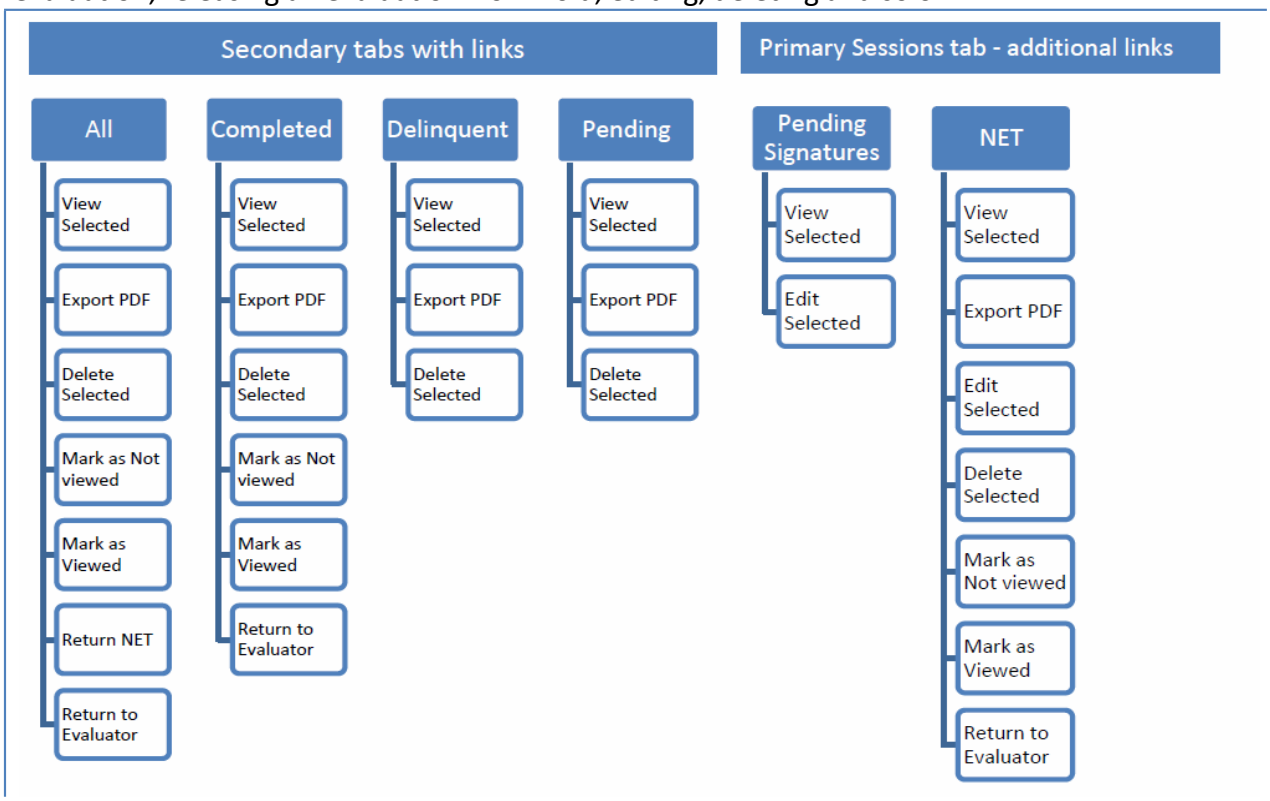
The Sessions tab gives you a list of all the sessions that exist in the current academic year by default. You can immediately see which sessions are moving along and which ones aren't. If you need to investigate further, you can click the name of the session to take a closer look at your options and matches or you can access other tabs to view the individual evaluations in different ways.

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



Each primary tab contains a group of secondary tabs to further refine your search. The secondary tabs contain data about individual matches, so you can view all evaluations, complete, delinquent or pending evaluations on that person.

Within each secondary tab are links to actions that can be taken, such as viewing the completed evaluation, releasing an evaluation from hold, editing, deleting and so on.



Each icon performs an action on the manage sessions start page (you can mouse over icons to see a description):

- Delete the session
- Copy a session
- Session is set to auto-copy
- Unlocked
- Locked
- Not archived
- Archived

Academic Year: 2007-2008 Interval: --- Include archived sessions Current date range: 7/1/2007 - 6/30/2008

Sessions | By Evaluator | By Subject | By Rotation | By Date

All department sessions that are active during this time frame

Name	Eval Type	Interval Count	Matches	Completed	Start	End	Anonymity
2007-2008 Praise Card for IM Residents	Person	1	0	0.0 %	07/01/2007	06/30/2008	None
Faculty Eval of Resident	Person	12	96	9.4 %	07/01/2007	06/30/2008	None
On the Fly Evaluation of Resident 07-08	Person	12	15	86.7 %	07/01/2007	06/30/2008	None
Peer Evaluation 07-08	Person	1	0	0.0 %	05/15/2008	06/15/2008	None
Program Evaluation	Rotation	1	3	33.3 %	07/01/2007	06/30/2008	None
Resident eval of program	Rotation	1	22	9.1 %	07/01/2007	06/30/2008	Total
Resident Eval of Rotation 07/08	Rotation	12	397	0.5 %	07/01/2007	06/30/2008	Subject
Resident Evaluation of Faculty	Person	12	108	3.7 %	07/12/2007	06/30/2008	Subject

Page 1 of 1 Item 1 to 8 of 8

Click the **>** icon to the left of the session to view intervals

RESEARCH ISSUES

Take advantage of the various tabs provided to investigate your sessions further.

Sessions | By Evaluator | By Subject | By Rotation | By Date

All department sessions that are active during this time frame

Name	Eval Type	Interval Count	Matches	Completed	Start	End	Anonymity
2010-2011 Faculty Evaluation of Resident	Person	12	6	33.3 %	07/01/2010	06/30/2011	Subject

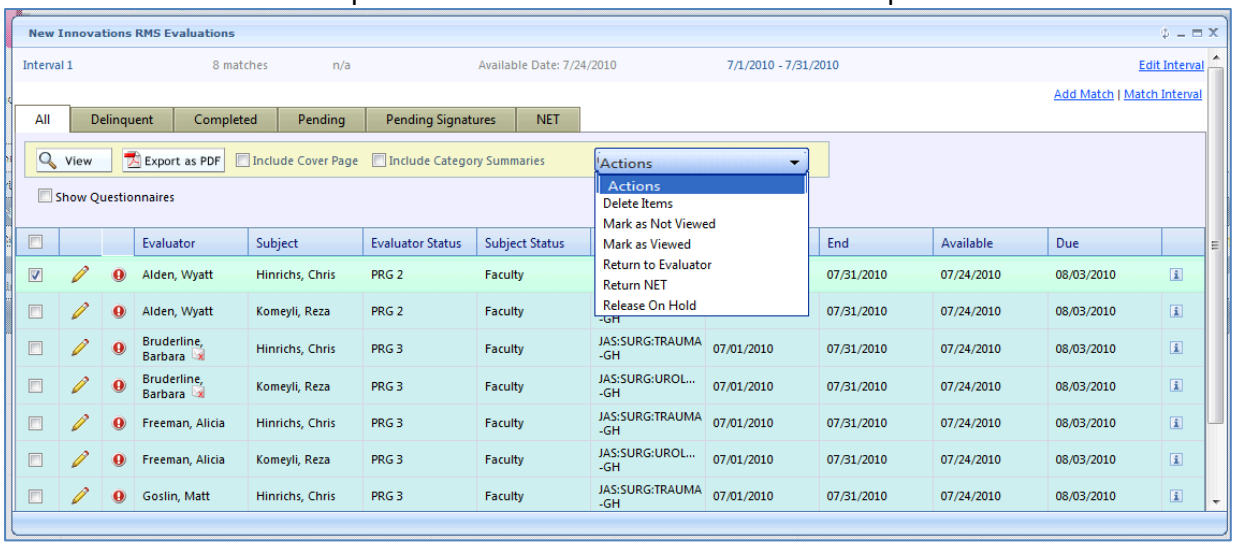
Interval Schedule Click the preview icon to edit the interval or manage matches for the date range.

Interval Name	Matches	Match Date	Available Date	Start/End Date
Interval 1	6 matches	7/25/2010	7/30/2010	7/1/2010 - 7/31/2010
Interval 2	0 matches	8/21/2010	8/26/2010	8/1/2010 - 8/31/2010
Interval 3	0 matches	9/20/2010	9/25/2010	9/1/2010 - 9/30/2010

- Click the magnifying glass icon to reveal the match details for the interval. Secondary tabs contain match details grouped by the indicated element: delinquent matches, completed matches, pending signatures and matches returned as NET.

- Each tab contains links to actions associated with the description of the tab. For instance, you can send a reminder to a person with delinquent evaluations from the

delinquent tab or return an evaluation to the evaluator on the NET tab. Place a check in the box next to the person's name to activate the Actions dropdown list.



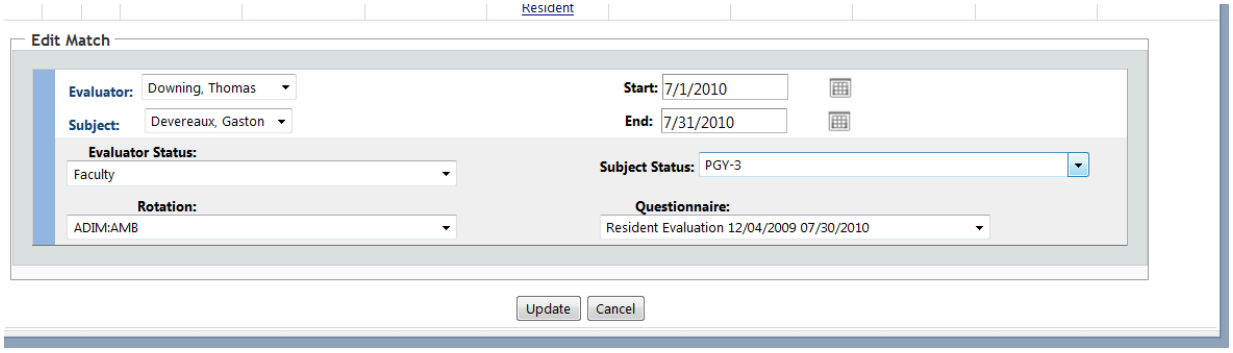
BY EVALUATOR TAB

This tab contains two alphabetical lists: one that contains evaluators from inside your department and one that lists evaluators from outside of your department. The evaluators are people who are identified in matches in your sessions for the selected timeframe. By default the selected timeframe is the current block. You'll see:

1. Evaluator names
2. Evaluator status as it appears in the match
3. Delinquent: a count of evaluations that are not complete and are overdue
4. Pending: a count of evaluations assigned to this person that are not complete and not overdue
5. A link to the person's block schedule for the selected time frame
   - Sort the list by clicking a column header. Click a letter on the alphabet tool below to view only those evaluators whose name starts with a particular letter.

Please note: If the count for a person is 0 delinquent and 0 pending evaluations, then all evaluations assigned to him or her for the selected time period have been completed. Click the expand (>) icon next to the names to see a list of all evaluations for each individual. The first tab shows all evaluations regardless of their state of completion. You can then drill down further by using the tabs to see just the completed evaluations, delinquent evaluations or pending evaluations.

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



BY SUBJECT TAB

This tab contains two alphabetical lists: one contains subjects from inside your department and one containing subjects from outside of your department. The subjects are people who are identified in matches in your sessions for the selected timeframe. By default the selected timeframe is the current block. You'll see:

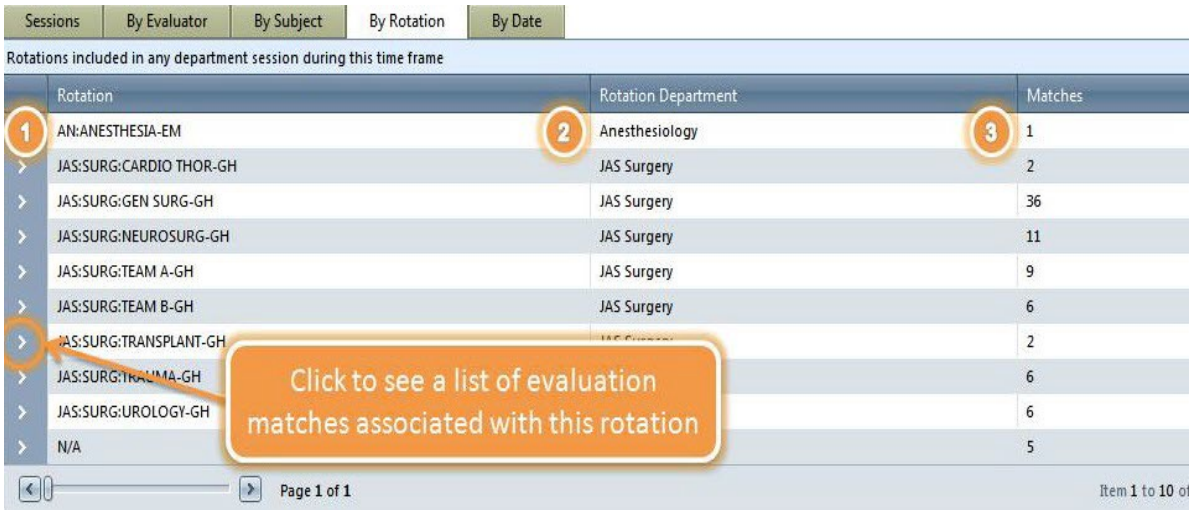
1. Subject names
2. Subject status as it appears in the match

3. Delinquent: a count of evaluations about this person that are not complete and are overdue
4. Pending: a count of evaluations about this person that are not complete and not overdue
5. A Link to the subject's block schedule for the selected timeframe

BY ROTATION TAB

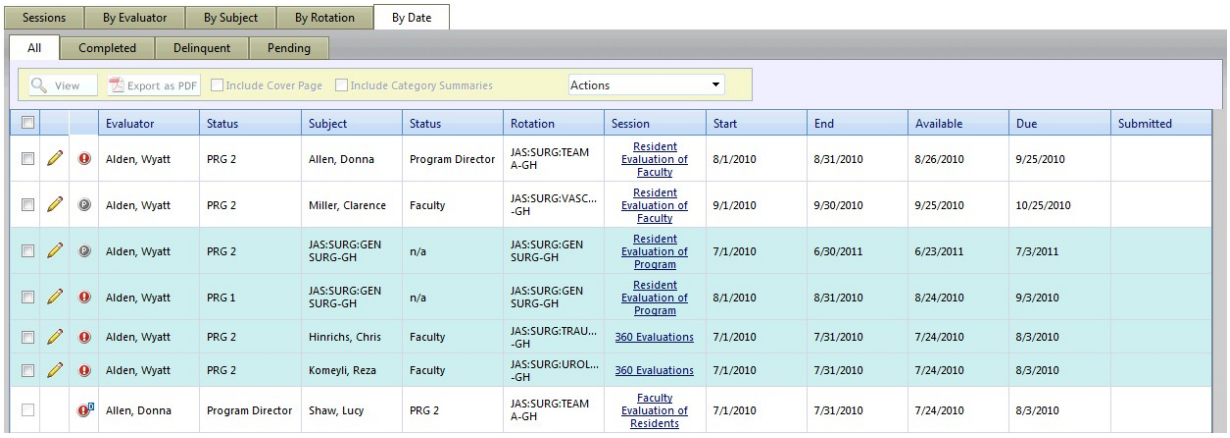
This tab contains an alphabetical list of rotations included in your sessions during the selected timeframe. You'll see:

1. Rotation names
2. The name of the department the rotation belongs to
3. A count of matches that are associated with the rotation



BY DATE TAB

This tab allows you to see a list of all evaluation matches belonging to your department's sessions for the selected timeframe. You can sort this list by clicking any column heading. From here, you can click the pencil icon to edit the match or click the magnifying glass to view the evaluation form.



Evaluator	Status	Subject	Status	Rotation	Session	Start	End	Available	Due	Submitted
Alden, Wyatt	PRG 2	Allen, Donna	Program Director	JAS:SURG:TEAM A-GH	Resident Evaluation of Faculty	8/1/2010	8/31/2010	8/26/2010	9/25/2010	
Alden, Wyatt	PRG 2	Miller, Clarence	Faculty	JAS:SURG:VASC... -GH	Resident Evaluation of Faculty	9/1/2010	9/30/2010	9/25/2010	10/25/2010	
Alden, Wyatt	PRG 2	JAS:SURG:GEN SURG-GH	n/a	JAS:SURG:GEN SURG-GH	Resident Evaluation of Program	7/1/2010	6/30/2011	6/23/2011	7/3/2011	
Alden, Wyatt	PRG 1	JAS:SURG:GEN SURG-GH	n/a	JAS:SURG:GEN SURG-GH	Resident Evaluation of Program	8/1/2010	8/31/2010	8/24/2010	9/3/2010	
Alden, Wyatt	PRG 2	Hinrichs, Chris	Faculty	JAS:SURG:TRAU... -GH	360 Evaluations	7/1/2010	7/31/2010	7/24/2010	8/3/2010	
Alden, Wyatt	PRG 2	Komeyli, Reza	Faculty	JAS:SURG:UROL... -GH	360 Evaluations	7/1/2010	7/31/2010	7/24/2010	8/3/2010	
Allen, Donna	Program Director	Shaw, Lucy	PRG 2	JAS:SURG:TEAM A-GH	Faculty Evaluation of Residents	7/1/2010	7/31/2010	7/24/2010	8/3/2010	

VIEW OR TAKE ACTION

Each of the above tabs has a set of secondary tabs that allow you to filter your evaluations:

- All
- Completed
- Delinquent
- Pending

When accessing any of the four tabs, you can choose to view matches (and print them) or export them as a PDF file. If you wish, you can include a cover page when printing evaluations. This is an extra page that you can set up with the Evaluator's name and the name of the person the completed evaluation should be returned to.
You can also include a summary of the evaluation scores by category, which will appear at the bottom of the completed form.

ALL

Take the following actions from the "All" tab:

- **Delete Items:** Remove the evaluation match
- **Mark as Not Viewed:** Matches marked as "Not Viewed" will appear in bold
- **Mark as Viewed:** Matches marked as "Viewed" will no longer appear in bold
- **Return NET:** Sends the evaluation back to the evaluator to complete it and the option to return it NET is no longer available to him or her.

COMPLETED

Take the following actions from the "Completed" tab:

- **Delete Items:** Remove the evaluation match
- **Mark as Not Viewed:** Matches marked as "Not Viewed" will appear in bold
- **Mark as Viewed:** Matches marked as "Viewed" will no longer appear in bold
- **Return to Evaluator:** Send the evaluation back to the evaluator for editing

- **Release On Hold:** Turn off the administrative hold feature to make the evaluation available to the next signer or the subject (if permitted by the session)
- **Return to On Hold:** Place an evaluation back on administrative hold (only for sessions that have "Administrative Hold" configured)
- **Send Signature Reminders:** Send an email to people to remind them to sign evaluations, if necessary
- **Return NET:** Sends the evaluation back to the evaluator to complete it and the option to return it NET is no longer available to him or her.

DELINQUENT

Take the following actions from the "Delinquent" tab:

- **Delete Items:** Remove the evaluation match
- **Send Delinquent Reminders:** Send email reminders to evaluators to complete their delinquent evaluations

PENDING

Take the following actions from the "Pending" tab:

- **Delete Items:** Remove the evaluation match

UNMATCHED PEOPLE

- **Only found in the sessions tab**

Deleted: Person was matched and then the match was deleted.
Scheduled After Match: Person added to the schedule after the session was matched
Not On Schedule: Person's status is included in the session, but they are not on the schedule
Wrong Status: Person's status is in the session and they are on the schedule, but their status on the rotation instance is different
Outside Department: Person's status is in the session and they are on a rotation included in the session, but their profile belongs to a department not included in the session
No Match: Person is on a rotation, has a status and belongs to a department included in the session, but there was not an evaluator or subject to match with.

ICONS ON THE MATCH PAGE

	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

MATCHING INTERVALS

To match an interval yourself, click the magnifying glass next to an interval name.

- Click **Match Interval** to have the system create matches for you based on the block schedule
- Click **Add Match** to create matches by selecting evaluators and subjects yourself
    1. Select Evaluator(s)
    2. Select Subject(s)
    3. Click **Preview Matches** to verify evaluations are correct and make any edits
    4. Click **Create Matches** to save your matches

The Interval Schedule contains a list of your intervals for the selected session. From here you can view each interval individually by clicking the magnifying glass icon. You can also get a summary of how many matches, the match date, the available date and the start and end dates for each interval. Delete the interval by clicking the delete icon to the left. Lock the interval to prevent editing by other level 5 users (level 6's can still edit locked intervals).

Previewing the matches lets you see a list of matches for the interval. From here, you can examine your matches closely and sort them according to whether they are delinquent, completed, pending signatures or returned NET. You may also view an email history for each evaluation to see what emails have been sent to the evaluator.

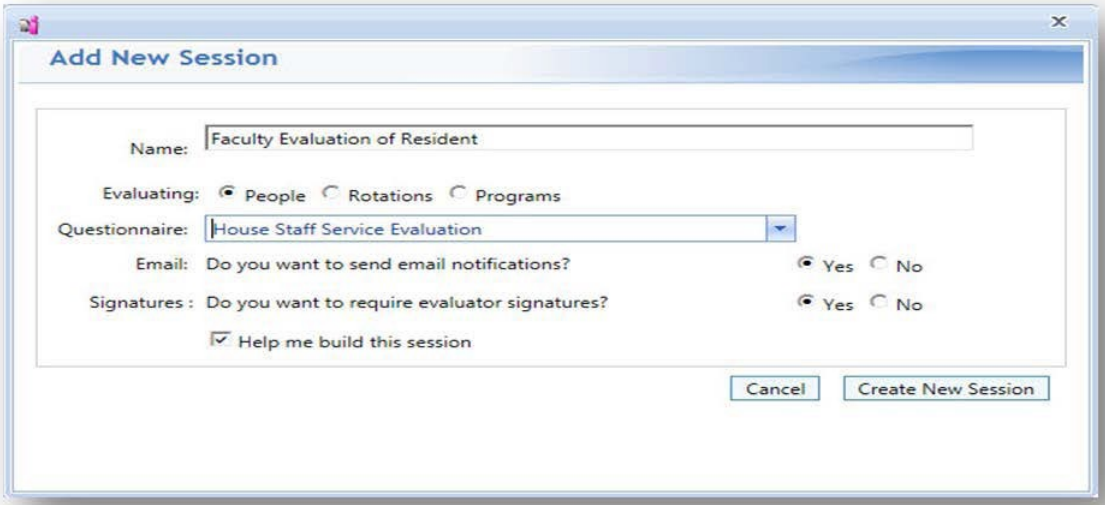
Print Selected: Sends all evaluations that have been selected to your printer

Export as PDF: Allows you to print an electronic copy and save it to your computer
Edit Selected: Allows you to change the evaluator, subject, statuses, rotations and dates for the selected evaluations
Delete Selected: Lets you remove evaluations from the list. If an evaluation is complete, you will be asked for further confirmation if you wish to delete it.

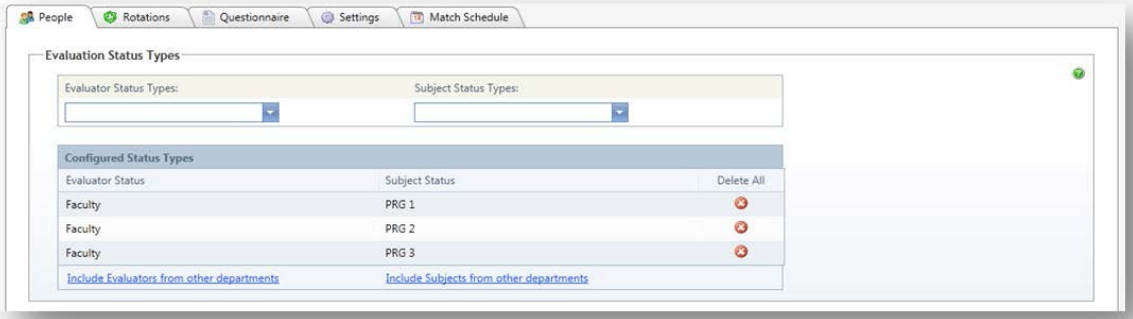
CREATE FACULTY EVALUATION OF RESIDENT SESSION

Create a session for the faculty to evaluate the residents or fellows.

1. Evaluations > Session Manager > Add New Session



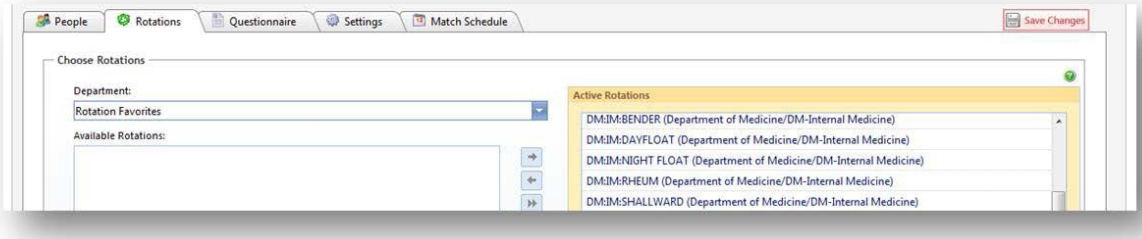
2. Type the name of the session in the Name field
3. Choose evaluating: People
4. Select the questionnaire
5. Yes to email
6. Yes to evaluator signatures
7. Choose whether or not to display help in building the session
8. Click **Create New Session**



1. Select the evaluator status types from the **Evaluator Status Type dropdown list**
2. Select the subject status types from the **Subject Status Types dropdown list**
3. Click **Include Evaluators from other departments** if your trainees are scheduled on rotations owned by another department and you want the outside faculty to evaluate your trainees.

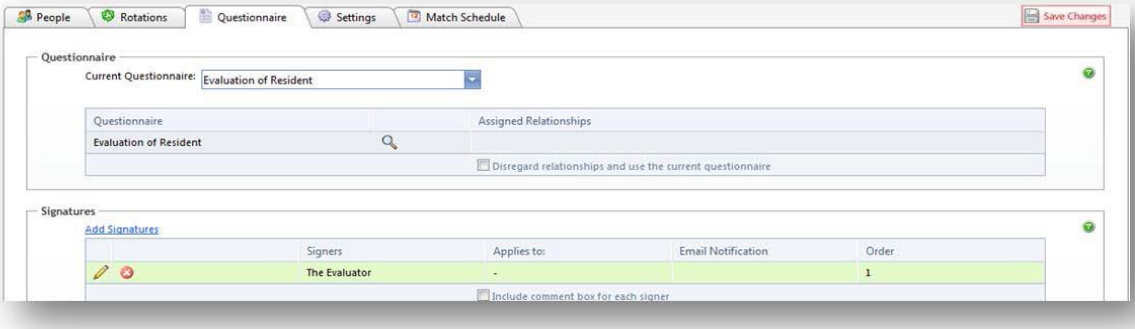
4. Select **"All"** and then click **Save**. Don't worry about selecting all departments: the system will only match your residents with faculty they are scheduled to work with.

ROTATIONS TAB



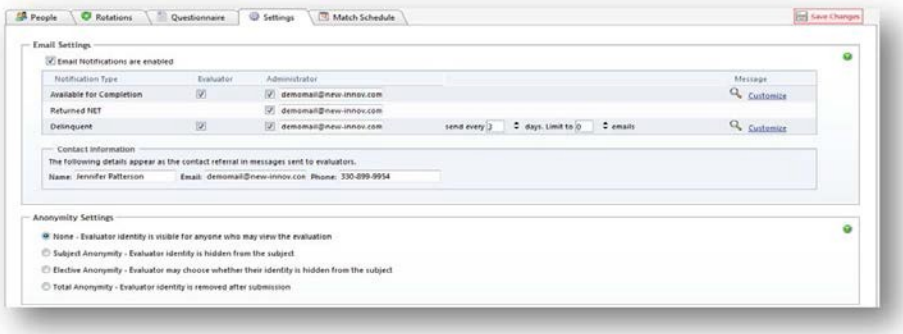
1. Highlight the rotations that should be included for matching in this session from the **available Rotations** box.
2. Move the selected rotations to the box on the right labeled **Active Rotations** by clicking the single arrow key pointing to the right or double clicking on the rotation name. You can move all rotations at once by clicking the double arrow pointing to the right.
3. Click **Save Changes**.

QUESTIONNAIRE TAB



1. Confirm the name of the **Questionnaire** to be used in this evaluation.
2. You can click the magnifying glass icon to see the text of the questionnaire selected.
3. Click **Add Signatures** to add more signers, such as the subject, program director or advisor.

SETTINGS TAB



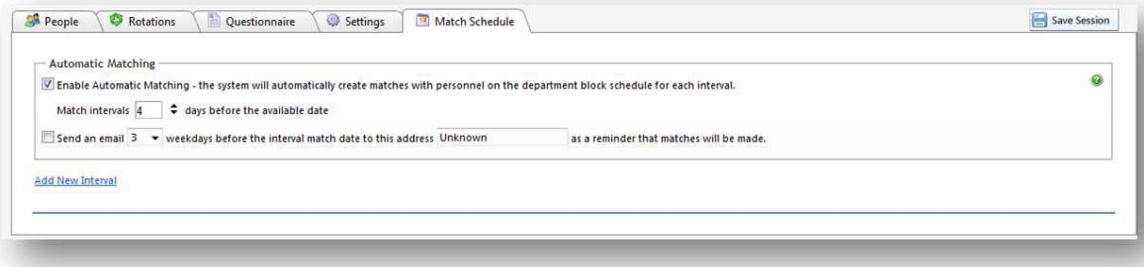
EMAIL OPTIONS

1. Your email address is prepopulated in text boxes to receive emails from this session.
2. Delinquent emails can be sent in a recurring pattern to people who have not completed their evaluations by the due date. Enter how often they should be sent and a total number (limit) to be sent.
3. Use the icon to view the default email text or click **Customize** to create your own.
4. Contact Information is automatically filled in for you from your Personnel Data profile

ANONYMITY SETTINGS

1. Select None for Anonymity

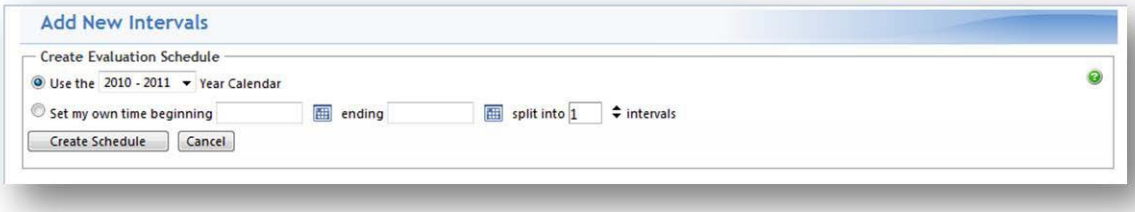
MATCH SCHEDULE TAB



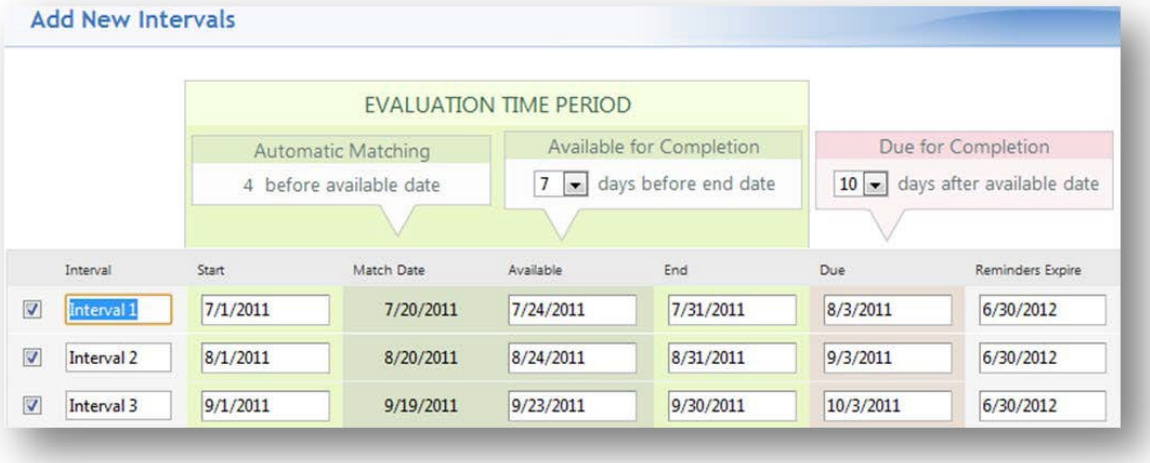
1. Automatic Matching: choose the number of days the session should match before the evaluations will be available.
2. Select the number of days before the interval end date that the session should be matched.
3. Check the box to have an email sent to alert you that matches are about to be made. Enter your email address and when you would like the email sent.
4. Click **Add New Interval**
5. Choose the interval pattern to use for the session.

a. The current academic year intervals
b. Create your own intervals by entering a start and end date and the number of intervals to divide the date range into.

6. Click **Create Schedule**



7. Available for Completion: choose the number of days before the end of the interval that the evaluation will be available for the evaluator to complete
8. Due for Completion: choose the number of days after the end of the interval by which the evaluator must complete the form. If the evaluation is not complete after this date, it will be considered delinquent
9. Make adjustments to the timeline if needed
10. Click **Continue**



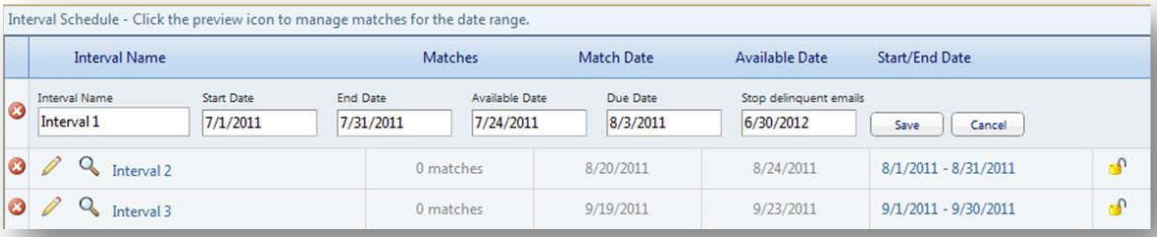
Your session is complete and will begin to make matches for you on the next scheduled match date.

MATCHING INTERVALS IN THE PAST

If interval match dates occurred in the past and you want to send out the evaluations now, follow these steps:

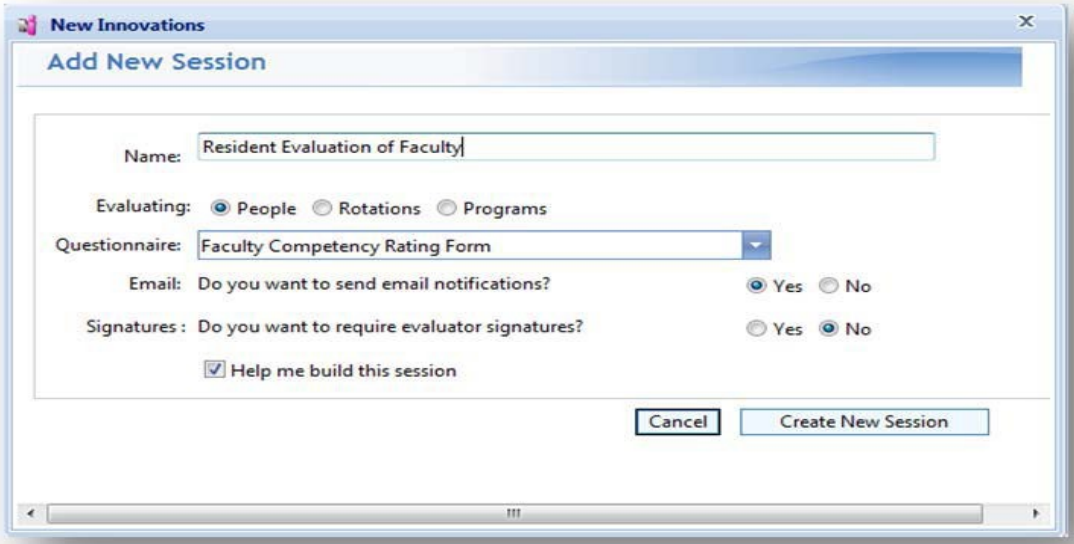
1. Click the **Match Schedule** tab for your session
2. Put a check in the box next to the interval(s) you want to match
3. Under **more** drop down
4. Select match

5. It will be necessary to edit the available date of the evaluation matches if the due date has passed.
6. To do this place a check in the box to the right of the interval you want to change and select the edit icon
7. The dates box will open up and allow you to change session interval dates, available date and due date
8. Click **Save**



CREATE RESIDENT EVALUATION OF FACULTY SESSION

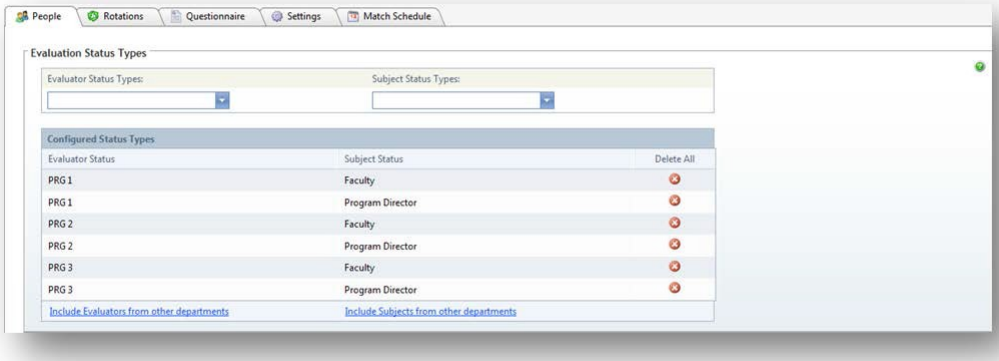
1. Evaluations > Session Manager > Add New Session



2. Type the name of the session in the **Name** field
3. Choose evaluating People
4. Select the correct questionnaire
5. Yes to email
6. No to evaluator signatures – If your session will be anonymous, you may not want the evaluators to have to sign completed evaluations

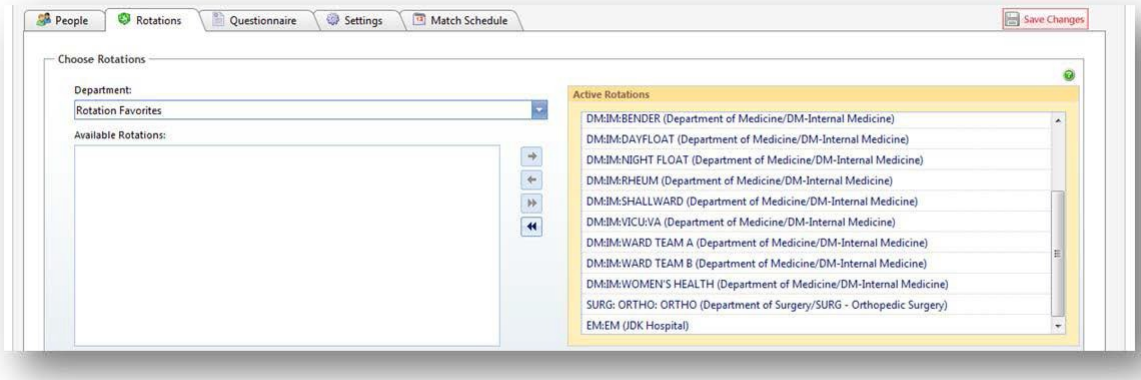
7. Click **Create New Session**

PEOPLE TAB



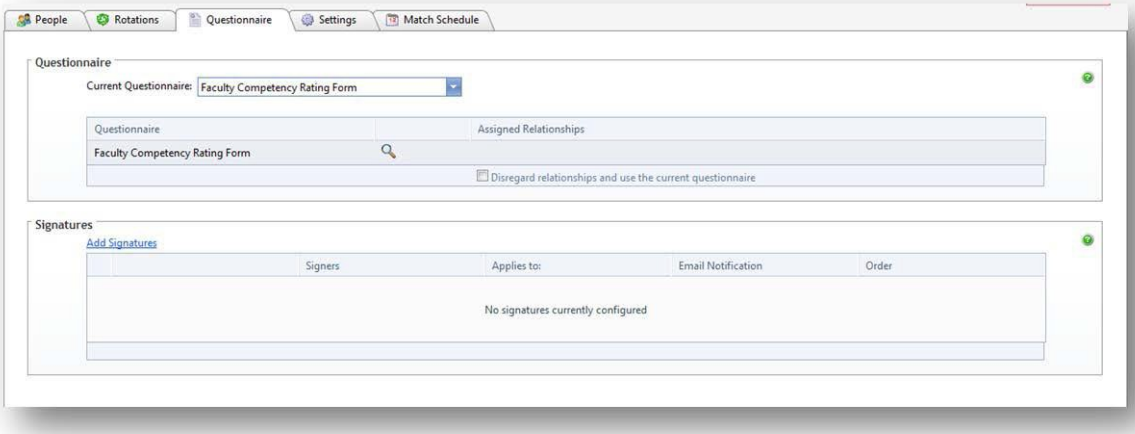
1. Select the evaluator status types from the **Evaluator Status Type** dropdown list
2. Select the subject status types from the **Subject Status Types** dropdown list
3. Click **Save**

ROTATIONS TAB



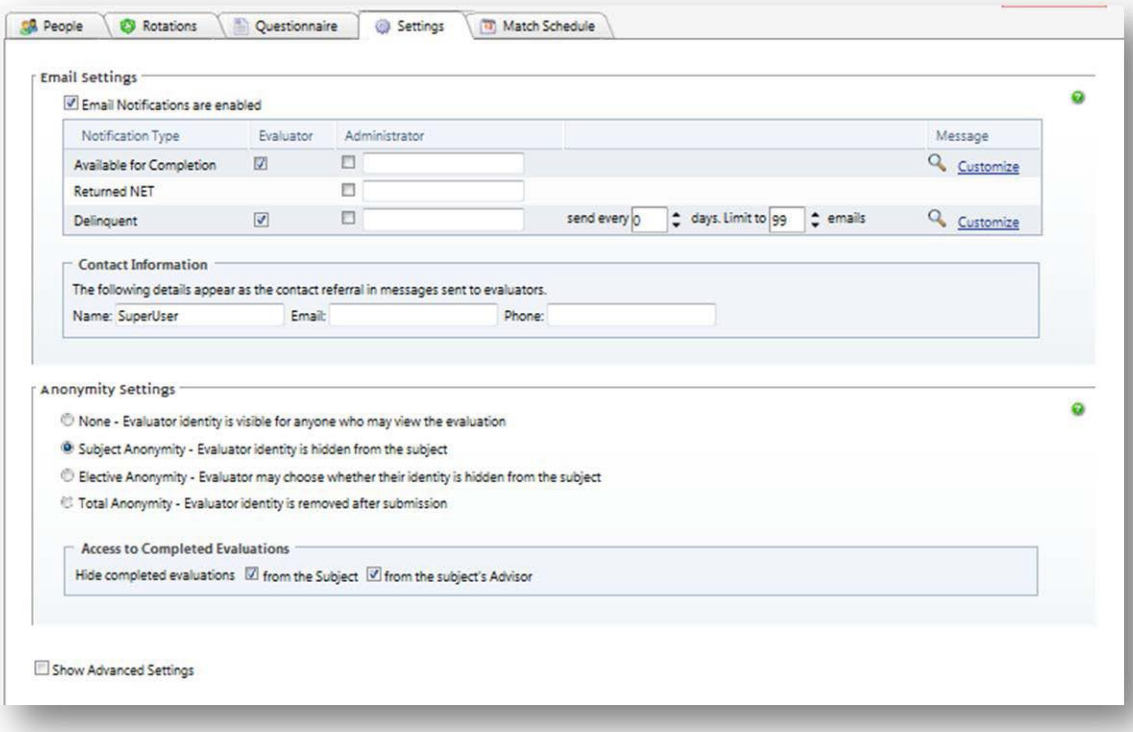
1. Highlight the rotations that should be included for matching in this session from the **Available Rotations** box.
2. Move the selected rotations to the box on the right labeled **Active Rotations** by clicking the single arrow key pointing to the right or double clicking on the rotation name. You can move all rotations by clicking the double arrow pointing to the right.
3. Click **Save Changes**.

QUESTIONNAIRE TAB



1. Check the name of the **Questionnaire** to be used in this evaluation.
2. You can click the icon to see the text of the questionnaire selected
3. If you need other people to review and sign completed evaluations, click Add Signatures

SETTINGS TAB



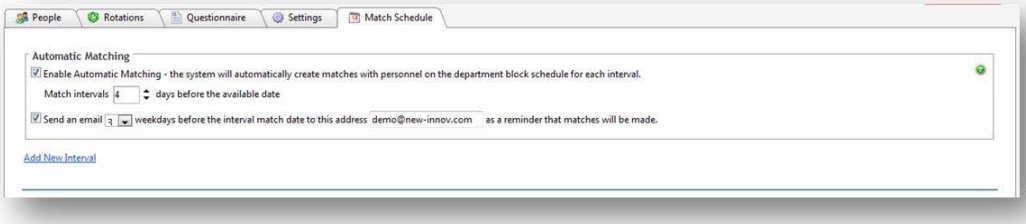
EMAIL OPTIONS

1. Enter your email address in the Administrator box to receive emails from this session
2. Enter **how often** delinquent reminders should be sent
1. Delinquent emails can be sent in a recurring pattern. Enter how often they should be sent and a total number (limit) to be sent. 99 is the default.
3. Use the magnifying glass icon to view the default email text or click **Customize** to create your own
4. Contact Information is populated with information from your personnel file

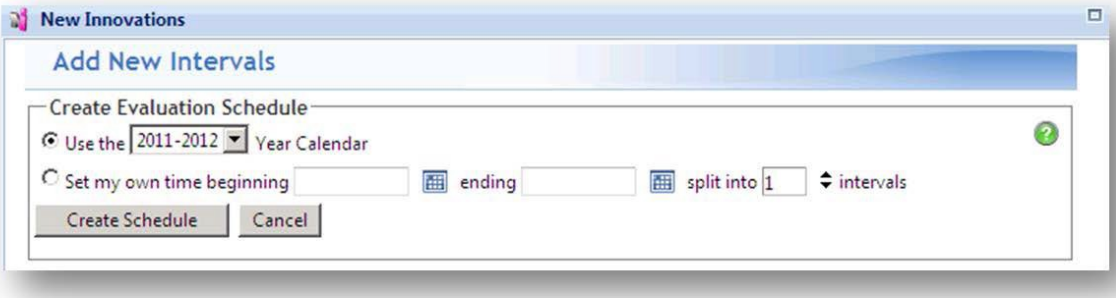
ANONYMITY

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

MATCH SCHEDULE TAB



1. Automatic Matching: choose the number of days the session should match before the evaluation will be available
2. Select the number of days before the interval end date that the session should be matched
3. Check the box to have an email sent to alert you that matches are about to be made. Enter your email address and when you would like the email sent
4. Click *Add New Interval*
5. Choose the interval pattern to use for the session
    1. Recommended: The current academic year intervals
    2. Or create your own intervals by entering a start and end date and the number of intervals to divide the date range into.
6. Click **Create Schedule**



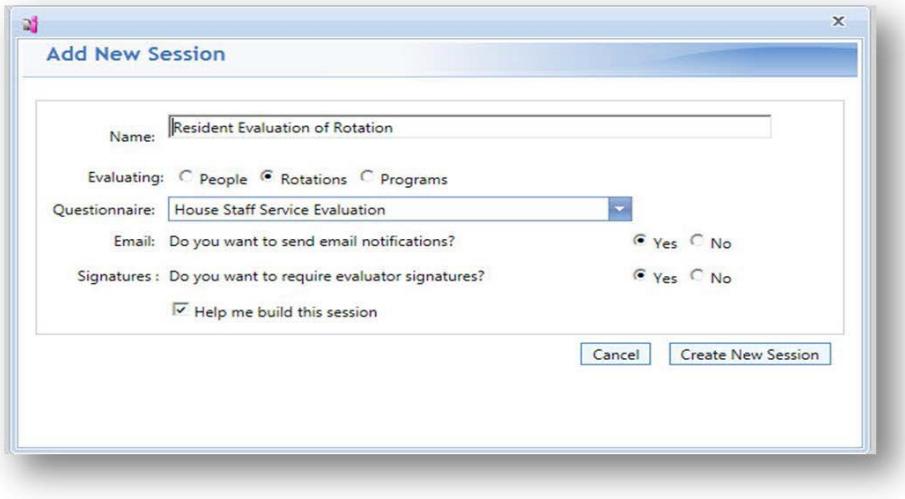
7. Available for Completion: choose the number of days before the end of the interval that the evaluation will be available for the evaluator to complete
8. Due for Completion: choose the number of days after the end of the interval by which the evaluator must complete the form. If the evaluation is not complete after this date, it will be considered delinquent
9. Make adjustments to the timeline if needed or change any of the individual dates
10. Click **Continue**

Your session is complete and will begin to make matches for you on the next scheduled match date. If there are intervals that occur in the past, use the same steps you used for the Faculty Evaluation of Resident.

CREATE RESIDENT EVALUATION OF ROTATION SESSION

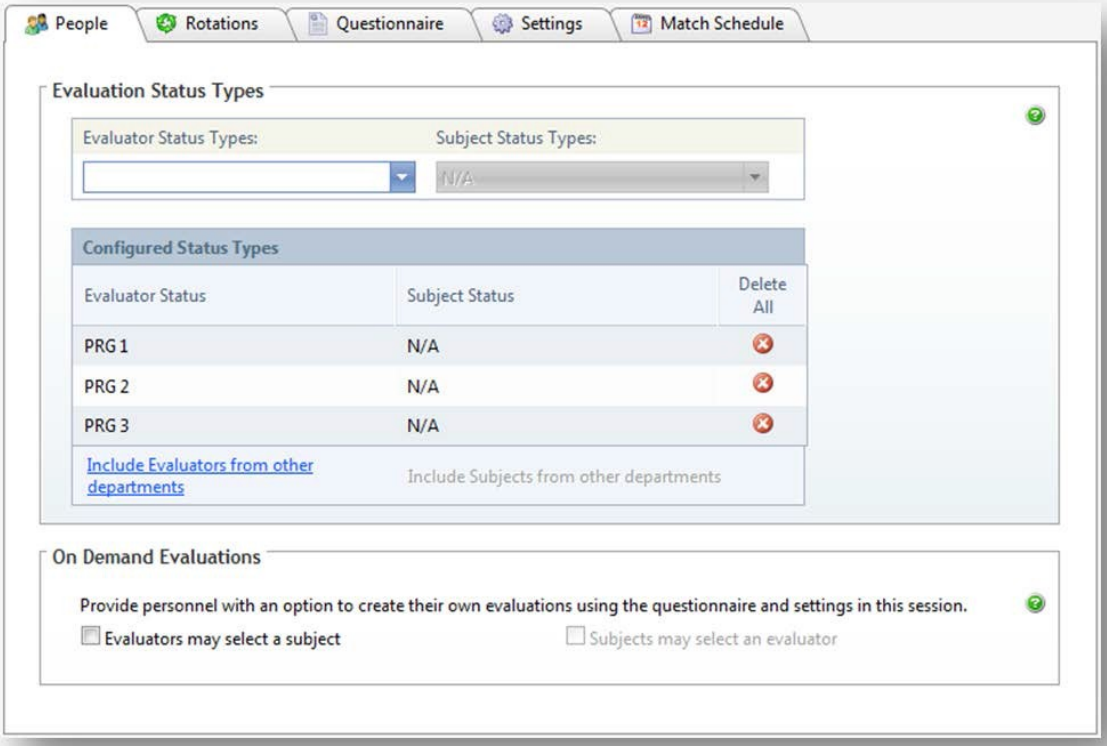
Rotation evaluations usually occur at the end of each rotation and may or may not be anonymous. Here are instructions for setting up a session to distribute resident evaluations of rotations using the most common settings.

ADD SESSION



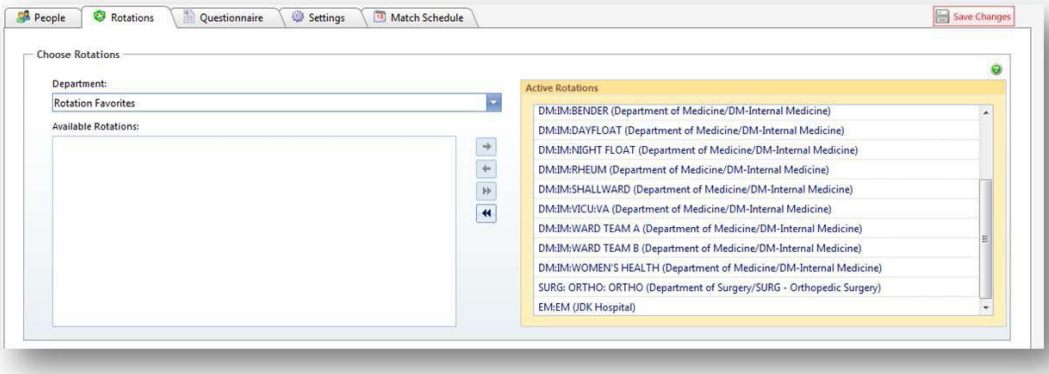
1. Evaluations > Session Manager > Add New Session
2. Type the name of the session in the Name field –Resident (or Fellow) Evaluation of Rotation
3. Choose evaluating Rotations
4. Select the correct questionnaire
5. Yes to email
6. Yes/No to evaluator signatures
7. Click **Create New Session**

PEOPLE TAB



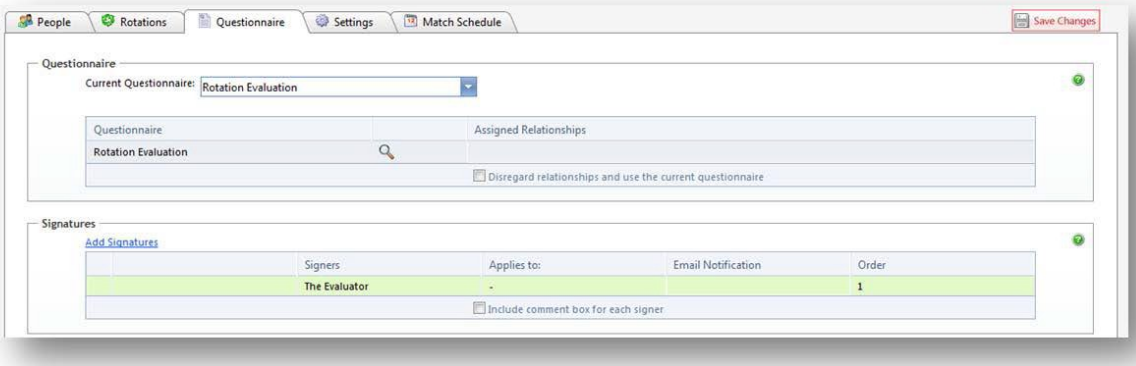
1. Select the evaluator status types
2. Click **Save Changes**

ROTATIONS TAB



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

QUESTIONNAIRE TAB



1. Check the name of the **Questionnaire** to be used in this evaluation.
2. You can click the magnifying glass icon to see the text of the questionnaire selected.
3. If additional signatures are needed, click *Add Signatures*.

SETTINGS TAB

EMAIL OPTIONS

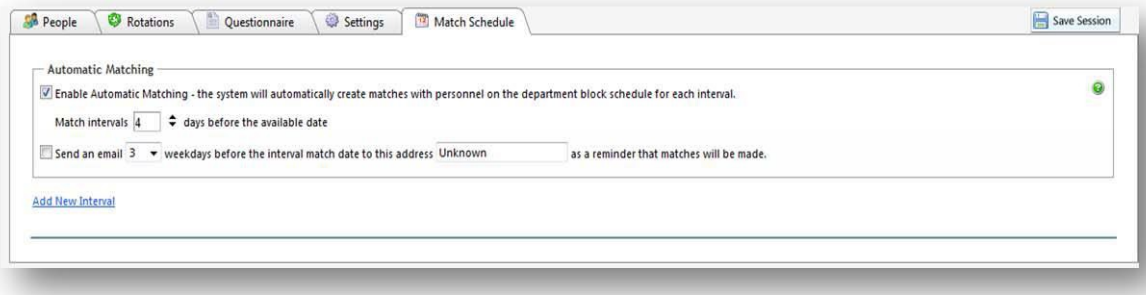
1. Add your email address in the administrator boxes to receive emails from this session.
2. Delinquent emails can be sent in a recurring pattern. Enter how often they should be sent and a total number (limit) to be sent.

3. Use the magnifying glass icon to view the default email text or click Customize to create your own.
4. **Contact Information** should be automatically inserted from your personnel file.

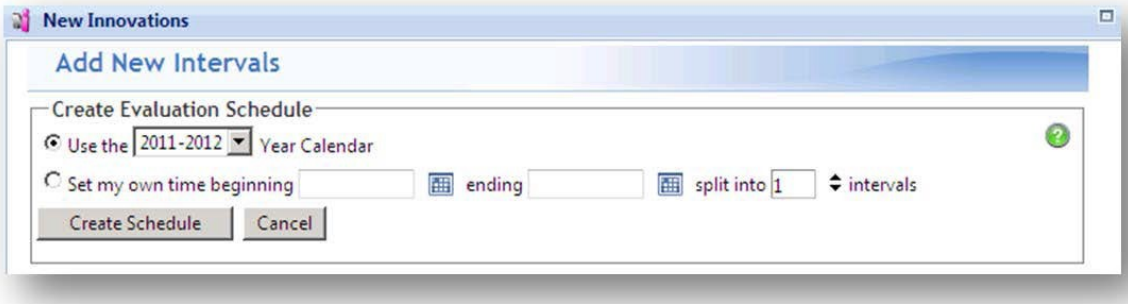
ANONYMITY

1. Select the type of anonymity preferred. If anonymity is left as "None," only administrators and the evaluator can see the results. If you want others to review the completed evaluation, you can require additional signatures

MATCH SCHEDULE TAB



1. Automatic Matching: choose the number of days the session should match before the evaluation will be available
2. Select the number of days before the interval end date that the session should be matched
3. Check the box to have an email sent to alert you that matches are about to be made. Enter your email address and when you would like the email sent
4. Click Add New Interval
5. Choose the interval pattern to use for the session
    a. The current academic year intervals
    b. Or create your own intervals by entering a start and end date and the number of intervals to divide the date range into.
6. Click **Create Schedule**



7. Available for Completion: choose the number of days before the end of the interval that the evaluation will be available for the evaluator to complete.
8. Due for Completion: indicate how many days the evaluator has to complete the evaluation. If the evaluation is not complete after this date, it will be considered delinquent.
9. Make adjustments to the timeline, if needed, or change any of the individual dates.
10. Click **Continue**

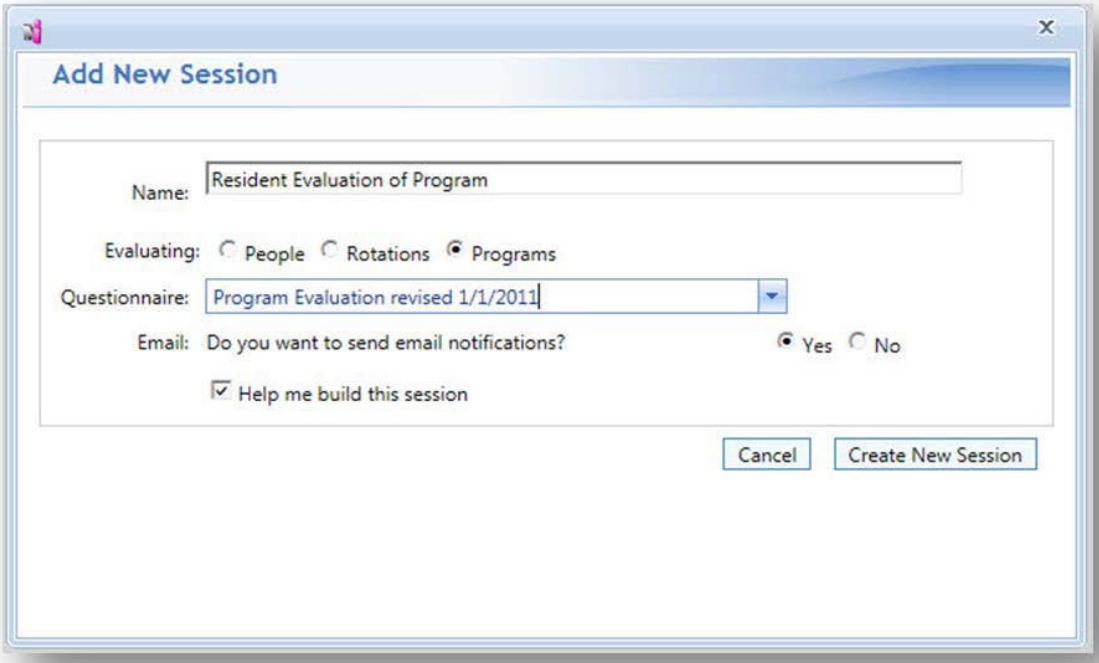
Your session is complete and will begin to make matches for you at the next scheduled match date.

CREATE RESIDENT AND FACULTY EVALUATION OF PROGRAM SESSION

Evaluations of the program usually occur at the end of each academic year and are completely anonymous. In this section, we'll give you instructions for creating a session with the most common settings for having the resident evaluate the program. You can also use this process to set up faculty evaluations of the program by making the faculty status the evaluator.

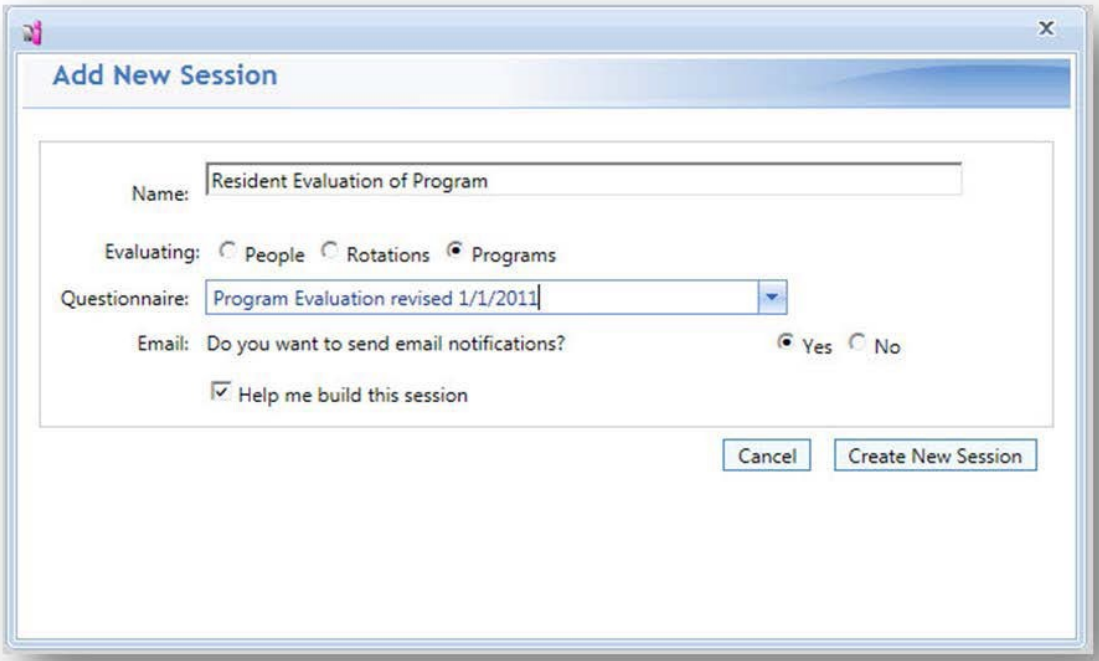
ADD SESSION TAB

1. Go to Main > *Evaluations* > *Sessions* > *Add New Session*



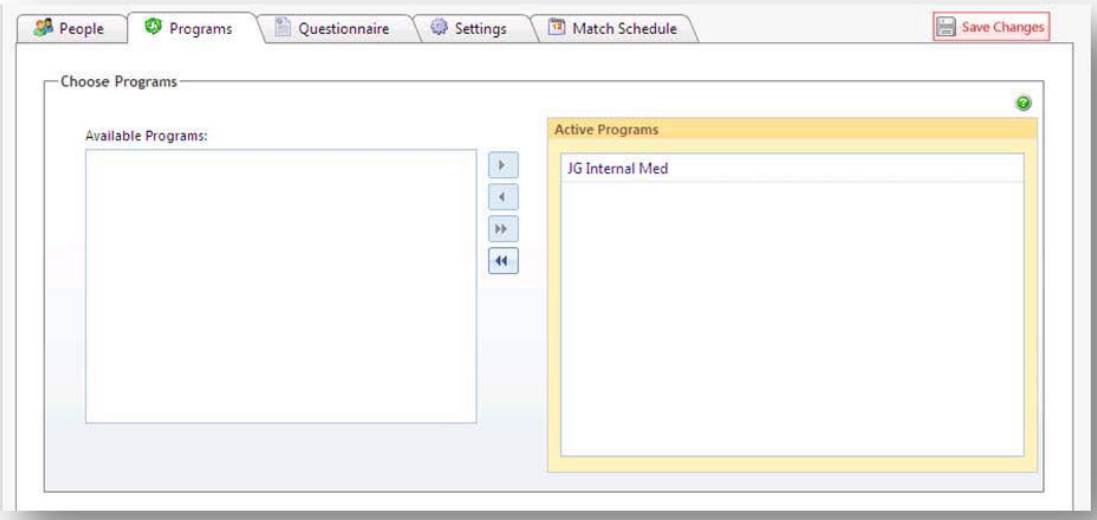
2. Type the name of the session in the New Session Name field
3. Choose evaluating **Programs**
4. Select the correct questionnaire
5. Yes to email
6. Click **Create New Session**

PEOPLE TAB



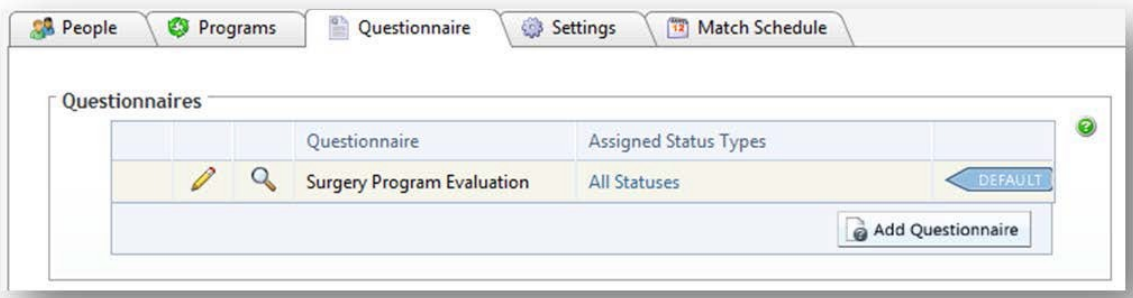
1. Select the evaluator status types from **the Evaluator Status Type dropdown list**

PROGRAMS TAB



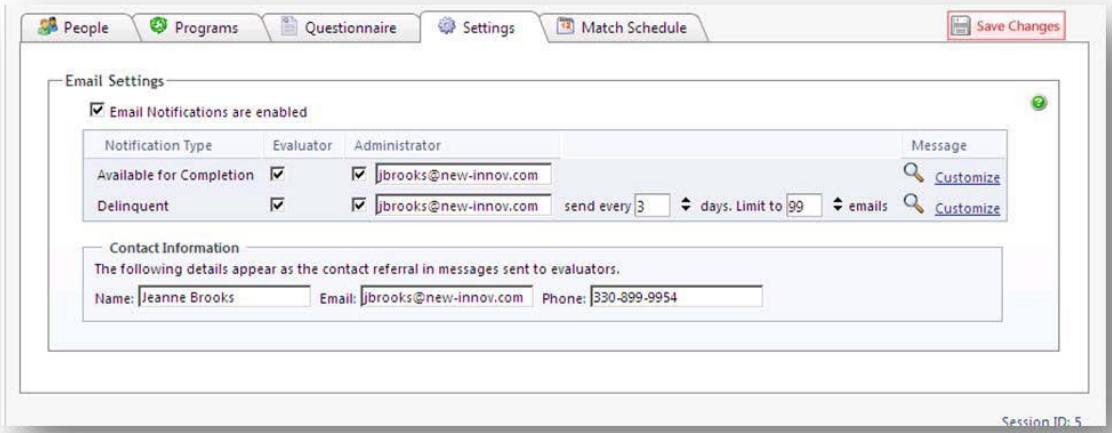
1. Highlight the program from the **Choose Programs** box to be included for matching this session.
2. Move the selected programs to the box on the right labeled **Active Programs** by clicking the single arrow key pointing to the left or double clicking on the program name.
3. Click **Save Changes**

QUESTIONNAIRE TAB



1. Check the name of the **Questionnaire** to be used in this evaluation.
2. You can use the magnifying glass icon to see the text of the questionnaire selected.

SETTINGS TAB

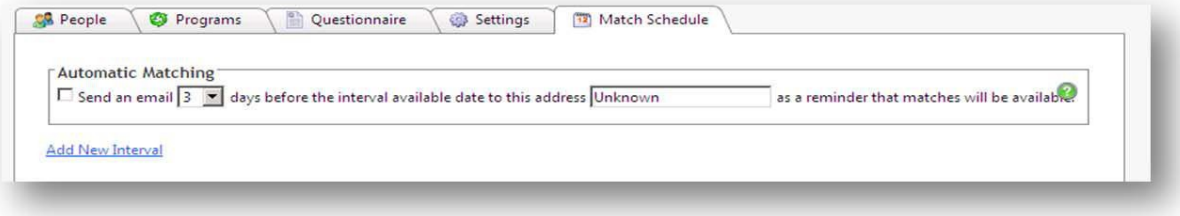


EMAIL OPTIONS

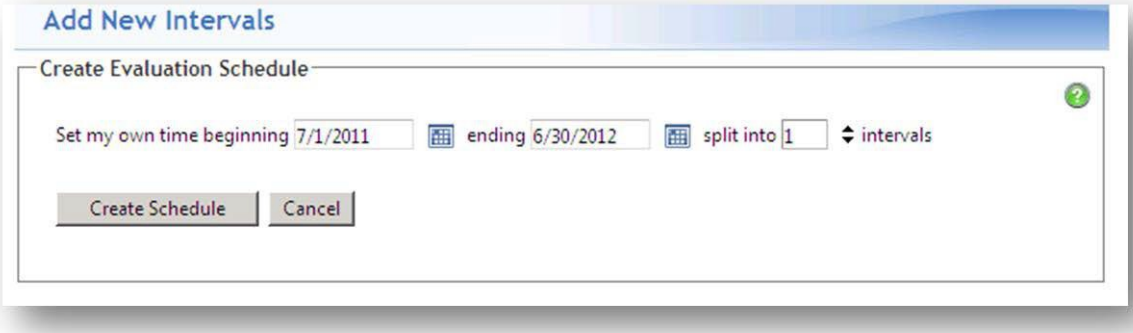
1. Enter your email in the administrator text boxes to receive emails from this session
2. Delinquent emails can be sent in a recurring pattern. Enter how often they should be sent and a total number (limit) to be sent.

3. Use the magnifying glass icon to view the default email text or click Customize to create your own
4. Contact Information should be automatically inserted from your Personnel Data profile
5. Click **Save Changes**

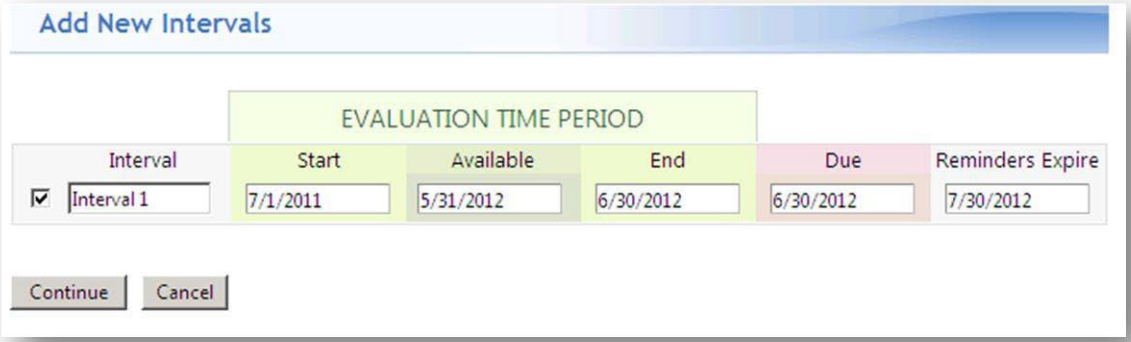
MATCH SCHEDULE TAB



1. Check the box to have an email notify you before the matches are to be made. Enter your email address and when you would like the email sent2.
2. Click **Add New Interval**



3. Create your own schedule by entering a start and end date and the number of intervals to divide the date range into.
4. Click **Create Schedule**



5. Check the Available date. This will be the date that the evaluation will be available for the evaluator to complete. Edit this date, if necessary.
6. Check the Due date. This will be the date that the evaluation is due to be completed. If the evaluation is not complete after this date, it will be considered delinquent. Edit this date, if necessary.
7. Click **Continue**

You have now finished building your session for automatic matching. If all interval match dates are in the future, no further action is necessary because matching will occur as scheduled.

The faculty evaluation of the program is built the same way as the resident evaluation of the program except the faculty status is chosen as evaluator.

When residents are the evaluators, the matches are made by pairing the resident with the program designated in his or her personnel data profile. When faculty members are the evaluators, the matches are made by determining what department the faculty is in and then matching the faculty with the program associated with the department.

CREATING RESIDENT ON DEMAND SESSION

To provide a session for a specified group of people to complete an evaluation at any time on a group of subjects within a specific date range. The evaluation can be filled out by evaluators at any time within the specified date range.

ADD SESSION

1. Evaluations > Session Manager > Add New Session
2. Enter the name of the session in the New Session Name field.
3. Select the correct questionnaire.
4. Choose evaluating People.
5. Yes to email.
6. Yes to evaluator signatures.
7. Choose whether or not to display the session coach for assistance in building the session.
8. Click on **Create New Session.**

PEOPLE TAB

Evaluator Selects Subject

1. Select the evaluator status types from the **Evaluator Status Type** dropdown list.
2. Select the subject status types from the **Subject Status Types** dropdown list.
3. Click **Add.**
4. Check the box **Evaluators may select a subject.**
5. Select which the evaluators will be able to create evaluations.
   a. Use all evaluators found with the evaluator status selected above.
   b. Customize the evaluator list by checking only those evaluators who should get the form
      i. Click **Select Evaluators.**
      ii. Filter by status type and department to narrow the available evaluator list.
      iii. Click **Show People.**
      iv. Check the names of the evaluators who can complete evaluations.
      v. Click **Save.**

Subject Selects Evaluator

1. Select the evaluator status types from the **Evaluator Status Type** dropdown list
2. Select the subject status types from the **Subject Status Types** dropdown list
3. Click Add
4. Check the box **Subjects may select an evaluator**
5. Select an option
    a. Subject status types identified in this session
    b. Customize the subject list by checking only those subjects who should get the form
        i. Click **Select Subjects**
        ii. Filter by status type and department to narrow the available subject list
        iii. Click **Show People**
        iv. Check the names of the subjects who can select an evaluator

ROTATIONS TAB

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

QUESTIONNAIRE TAB

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

SETTINGS TAB

Email Settings

Evaluator Selects Subject

Since a match is not created until the evaluator chooses a subject, the Available for Completion notification is not generated and can be unchecked as well as the NET option. If an evaluator creates a match and saves it in draft or just never completes it, a delinquent email reminder can be sent. However, if On Demand is used in conjunction with automatic matching, leave the email notifications enabled.

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

Anonymity Settings
If the identity of the evaluator should be hidden, select the type of anonymity.

Subject Selects Evaluator

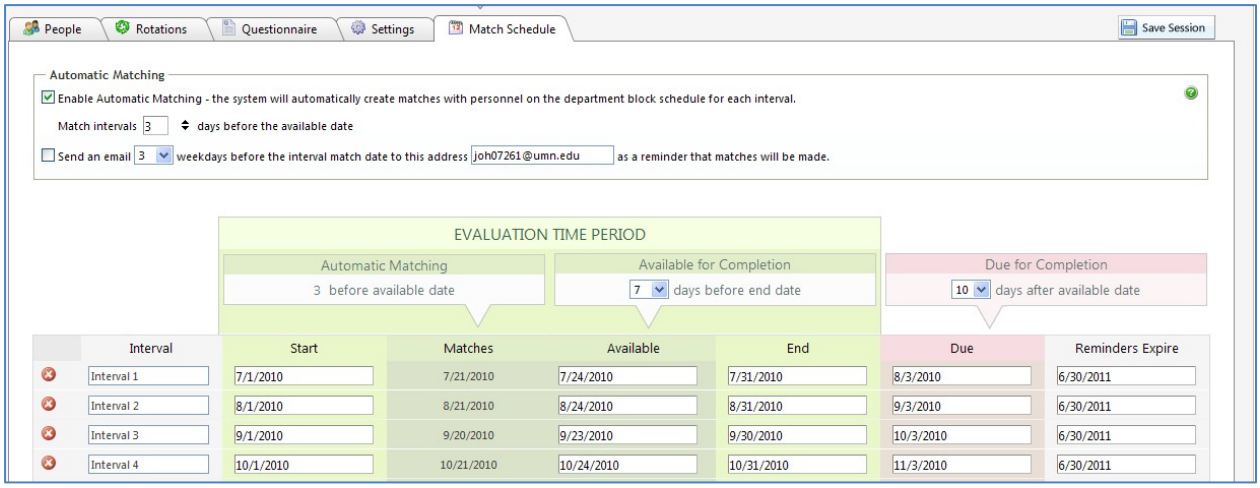
When a subject selects an evaluator, a notification is sent to the evaluator

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

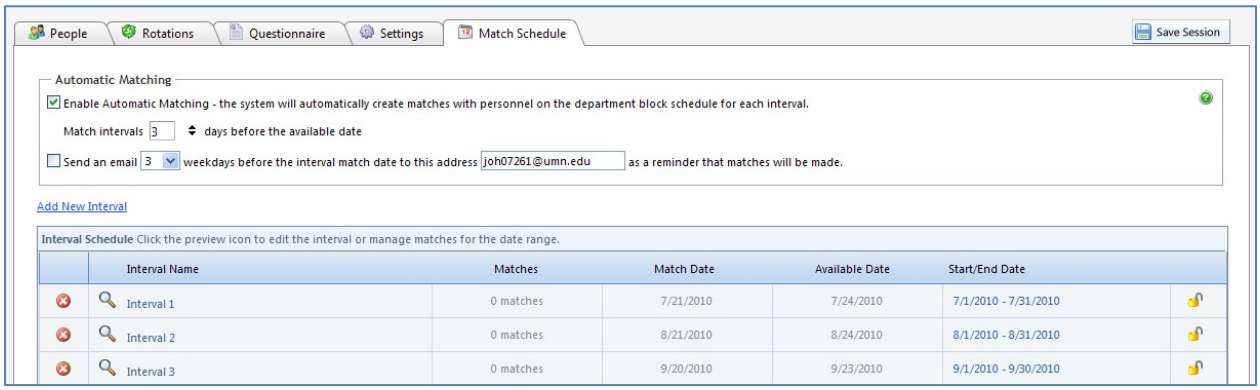
Anonymity Settings
1. If the identity of the evaluator should be hidden, select the type of anonymity

MATCH SCHEDULE TAB

1. Choose how to create the interval schedule for matching.
   a. Use the academic year intervals.
   b. Or create your own intervals by entering a start and end date and the number of intervals to divide the date range into.
2. Click **Create Schedule.**



3. Enter the number of days after the end of the interval that the evaluator has to complete the evaluation before it is considered delinquent.
4. Click **Continue.**



5. Click **Save Session**.

You are finished creating your session. The evaluators can complete as many evaluations as they would like any time between the start and completion dates of the session.

CREATING RESIDENT 360 EVALUATION SESSION

ADD SESSION

1. Evaluations > Session Manager > Add New Session
2. Type the name of the session in the New Session Name field.
3. Select the correct questionnaire.
4. Choose evaluating People.
5. Yes to email.
6. Decide on evaluator signature.
7. Choose whether or not to display the session coach for assistance in building the session.
8. Click on **Create New Session.**

PEOPLE TAB

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

ROTATIONS TAB

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

QUESTIONNAIRE TAB

1. Confirm the **Questionnaire** to be used in this evaluation.
2. Signatures can be configured, but this type of session is usually anonymous with not signature required.

SETTINGS TAB

Email Options

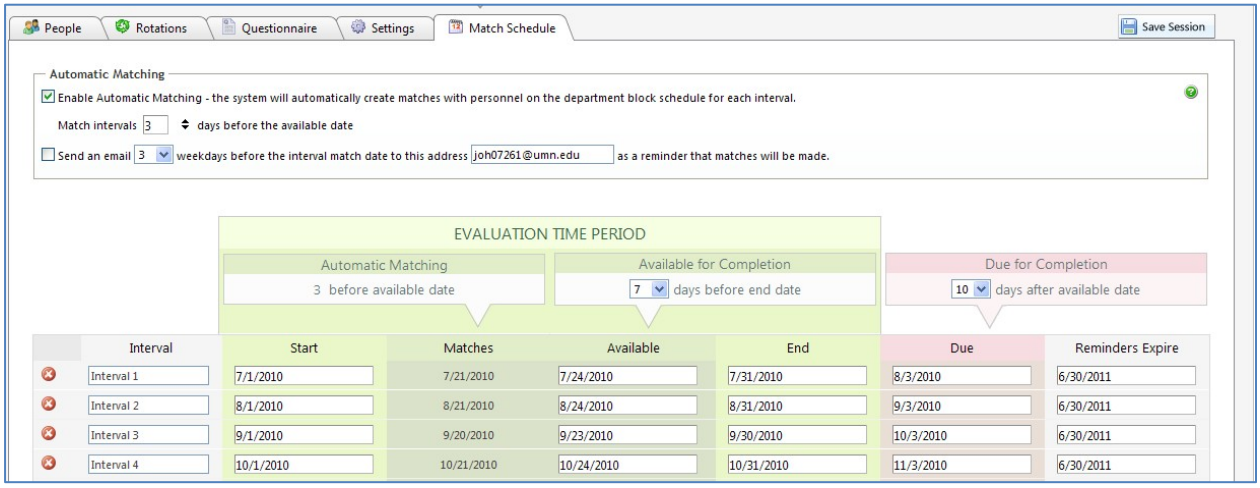
1. Enter your name in text boxes to receive emails from this session.
2. Enter **how often** delinquent reminders should be sent.
3. Delinquent emails can be sent in a recurring pattern. Enter how often they should be sent and a total number (limit) to be sent.

4. **Contact Information** is pre-populated.

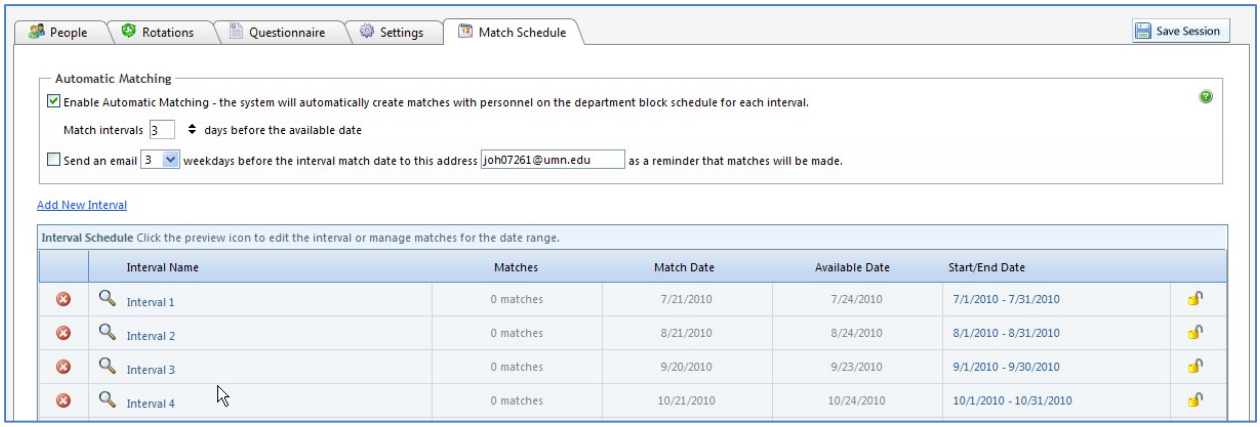
Anonymity

Select type of Anonymity. This type of session is usually **Total Anonymity.**

1. Select an option to create the schedule:
    a. Use the intervals from the selected academic year.
    b. Or create your own intervals by entering a start and end date and the number of intervals to divide the date range into.
2. Click **Create Schedule**.
3. Automatic Matching: choose the number of days before the available date that the session should match
4. Enter the number of days prior to the match that you would like to be notified that the session will match, and then enter your email address in the text field.
5. Click **Create Schedule**.



6. The number in the Automatic Matching column is from the Match Interval field above.
7. Available for Completion: choose the number of days before the end of the interval that the evaluation will be available for the evaluator to complete.
8. Due for Completion: choose the number of days after the end of the interval that the evaluator has to complete the form. If the evaluation is not complete after this number of days, it will be considered delinquent.
9. Make adjustments to the timeline if needed.
10. Click **Continue**.



11. Click **Save Session.**
12. The session will make the matches on the date indicated in the Match Date column.
13. If a match date occurs in the past, you can initiate the matching process by clicking on the preview icon and clicking the **Match Interval** link.

<u>To manually match this session:</u>

1. Click the **link for the interval you want to match**.
2. Click **Add Match** link in the top, right corner.
3. Select **Match all selected people except to themselves.**
4. From the list on the left, highlight all evaluators.
5. From the list on the right, highlight all subjects.
6. Click **Preview Matches.**
7. Make necessary changes to matches.
8. Click **Create Matches.**

EDITING SESSIONS

RECONFIGURE SIGNATURES

You can change who is required to sign an evaluation form after you've created the evaluation session if there are no completed evaluations in any interval. Go to the Questionnaire tab and adjust the settings.

However, if there are completed evaluations in any interval in the session, the signature options cannot be changed in the set up. You will have to copy the session and make the signature changes to the copy.

ADJUST ANONYMITY

You can adjust the anonymity settings by going to the Settings tab. Here is how the change affects the session.

If the current setting is **None**
Changing it to **Force to Subject** will make all matches in the session anonymous to the subject, even the completed ones. This process is reversible.

Total Anonymity erases the names of the evaluator on completed evaluations. All evaluations completed after the change will have the new setting. This is not reversible.

If the current setting is **Force to Subject** Changing it to **None** reveals the name of the evaluator and their information on completed evaluations. All evaluations completed after the change will have the new setting. This is reversible.

Total Anonymity erases the names of the evaluators on completed evaluations. All evaluations completed after the change will have the new setting. This is not reversible.

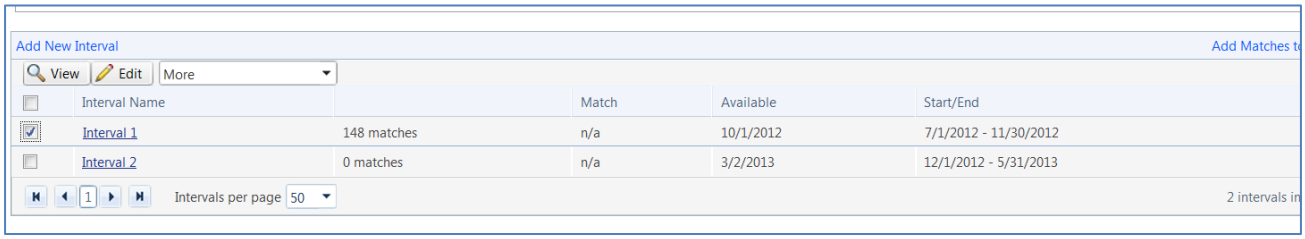
If the current setting is **Total Anonymity** changing it to **None** does not affect completed evaluations. You will not be able to retrieve the evaluator information. Only those evaluations that have yet to be completed will have the new setting. **Force to Subject** does not affect completed evaluations. You will not be able to retrieve the evaluator information. Only those evaluations that have yet to be completed will have the new setting.

CHANGING SESSION INFORMATION

1. Go to the Session Manager
2. Click on the name of the session
3. To edit the name of the session, click the pencil icon at the top of the page beside the name and make changes
4. Click **Save Session**
5. To edit the configuration in a tab, click on the appropriate tab and make edits
6. Click **Save Session**

CHANGE DATES ON THE MATCH PAGE

1. Click the Match Schedule tab
2. To edit interval dates, check the box next to the interval you want to change and click the edit button.



3. Make changes to dates and click Save

DELETE MATCHES

1. Go to the Session Manager
2. Click on the name of the session
3. Click the Match Schedule tab
4. Click on the interval name by the correct interval
5. Place a check mark in front of the match to delete
6. Find the Actions dropdown list at the top right corner of the page
7. Click on the drop-down arrow
8. Click **Delete Items**
9. Click **Ok**

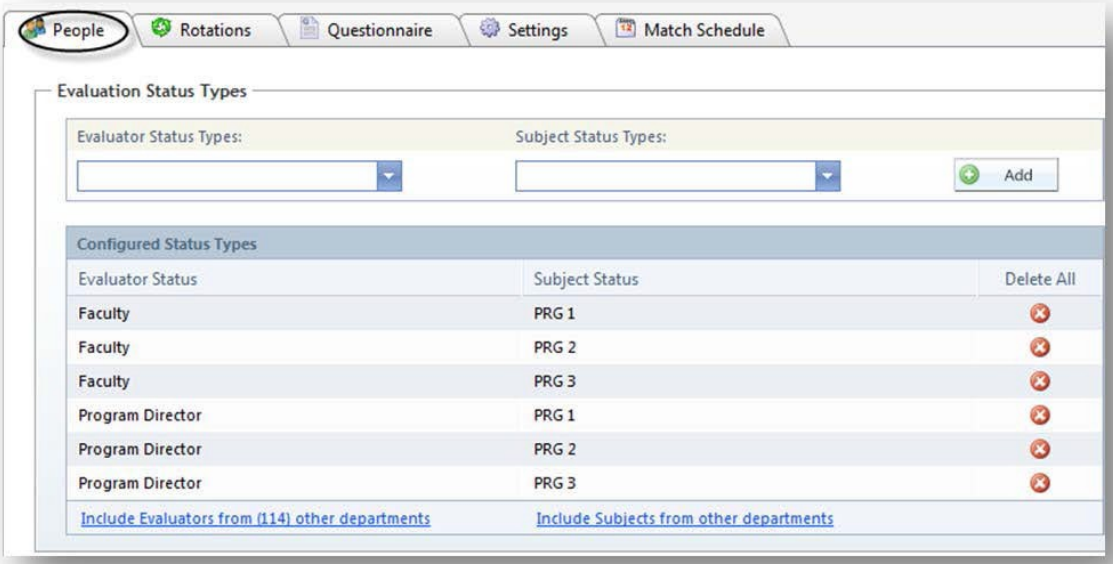
EDIT MATCHES

1. Go the Session Manager
2. Click on the name of the session
3. Click the Match Schedule tab
4. Click the interval name by the correct interval
5. Click the pencil icon in front of the match to edit
6. Find the Actions dropdown list at the top right corner of the page
7. Click on the drop-down arrow
8. Click **Edit Items**
9. Click **Ok**
6. Make the necessary edits
7. Click **Update**

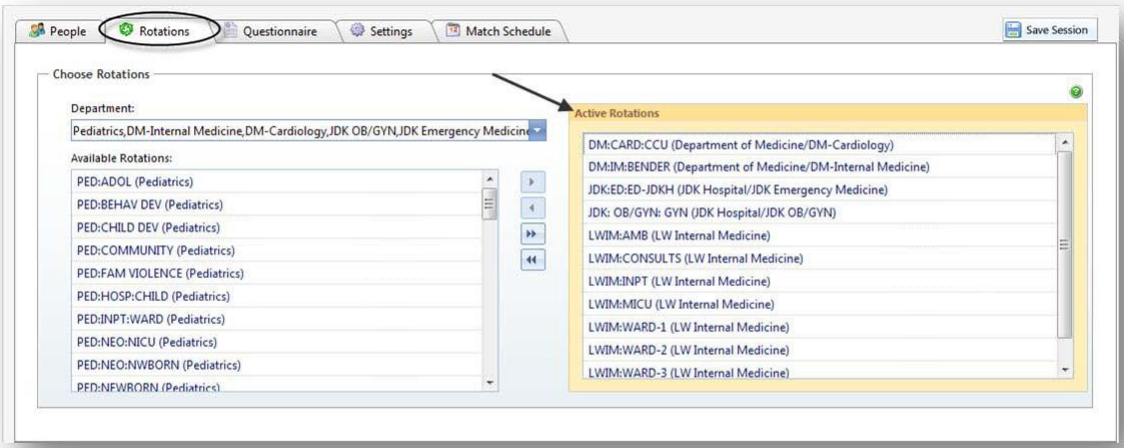
PROBLEM SOLVING TECHNIQUES

Should **T**his **R**eally **B**e a **S**truggle? – (**S**tatus **T**ypes, **R**otations, **B**lock **S**chedule) When you come across an issue with a session, don't sit and scratch your head…remember to ask yourself "**S**hould **T**his **R**eally **B**e a **S**truggle?" and check the **S**tatus **T**ypes configured within the session, the **R**otations configured within the session and the **B**lock **S**chedule for the individuals you expect to match.

Status Types –What status types are configured in the session? What status types that should be matching?



Rotations – What rotations are configured in the session? On what rotation is the evaluator/subject match pair?



Block Schedule – What is the block schedule for the individuals who are/were expected to match? (Go to *Main > Scheduling – Block > Create/Edit > Block Schedule Rotations*)

Create/Edit Rotations

Person: Johnston, Carissa Academic Year: 2010-2011

Access All Faculty

☐ Include Archived People ☐ Include Archived Rotations in the List Below

☑ Turn Off Rotation Pager When Editing

Create rotation intervals using one of these options:

Option One: Add default intervals for the selected academic year.

or

Option Two: Add default intervals for the selected academic year one interval at a time.

or

Option Three: Add a new interval.

Deleted Rotation History | Delete All

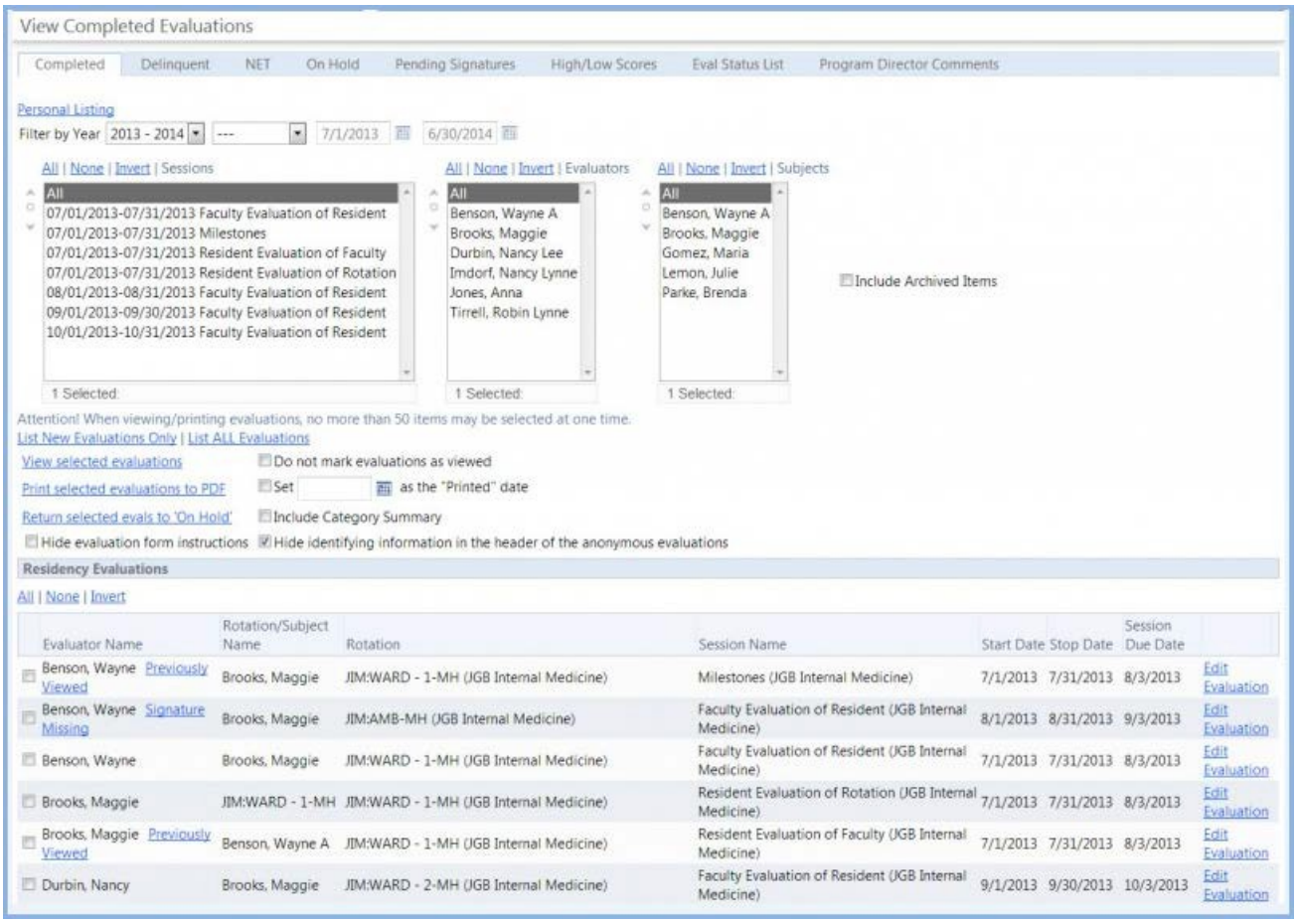
New Rotations

	Edit	Start Date	End Date	Rotation	Department	Division	Status	PGY	Program	Rotation Pager	Personal Pager	Primary	Compensation Status	Notes	History
Delete		7/1/2010	7/31/2010	LWIM:WARD-3	LW Internal Medicine		PRG 2	2	LW Internal Medicine	---	---				History
Delete		8/1/2010	8/31/2010	PED:COMM PEDS	Pediatrics		PRG 2	2	LW Internal Medicine	---	---				History
Delete		9/1/2010	9/30/2010	DM:CARD:CCU	Department of Medicine	DM-Cardiology	PRG 2	2	LW Internal Medicine	---	---				History
Delete		10/1/2010	10/31/2010	DM:IM:BENDER	Department of Medicine	DM-Internal Medicine	PRG 2	2	LW Internal Medicine	---	---				History
Delete		11/1/2010	11/30/2010	JDK: OB/GYN: GYN	JDK Hospital	JDK OB/GYN	PRG 2	2	LW Internal Medicine	---	---				History
Delete		12/1/2010	12/31/2010	JDK:ED:ED-JDKH	JDK Hospital	JDK Emergency Medicine	PRG 2	2	LW Internal Medicine	---	---				History
Delete		1/1/2011	1/31/2011	LWIM:AMB	LW Internal Medicine		PRG 2	2	LW Internal Medicine	---	---				History
Delete		2/1/2011	2/28/2011	LWIM:CONSULTS	LW Internal Medicine		PRG 2	2	LW Internal Medicine	---	---				History
Delete		3/1/2011	3/31/2011	LWIM:INPT	LW Internal Medicine		PRG 2	2	LW Internal Medicine	---	---				History
Delete		4/1/2011	4/30/2011	LWIM:MICU	LW Internal Medicine		PRG 2	2	LW Internal Medicine	---	---				History
Delete		5/1/2011	5/31/2011	LWIM:WARD-1	LW Internal Medicine		PRG 2	2	LW Internal Medicine	---	---				History
Delete		6/1/2011	6/30/2011	LWIM:WARD-2	LW Internal Medicine		PRG 2	2	LW Internal Medicine	---	---				History

Edit

VIEW COMPLETED EVALUATIONS

1. Go to *Evaluations > View Evaluations*
2. By default, you'll be on the **Completed** tab
3. Select the date range
4. Select the Session
5. Select the Evaluators
6. Select the Subjects
7. Click **List All Evaluations**

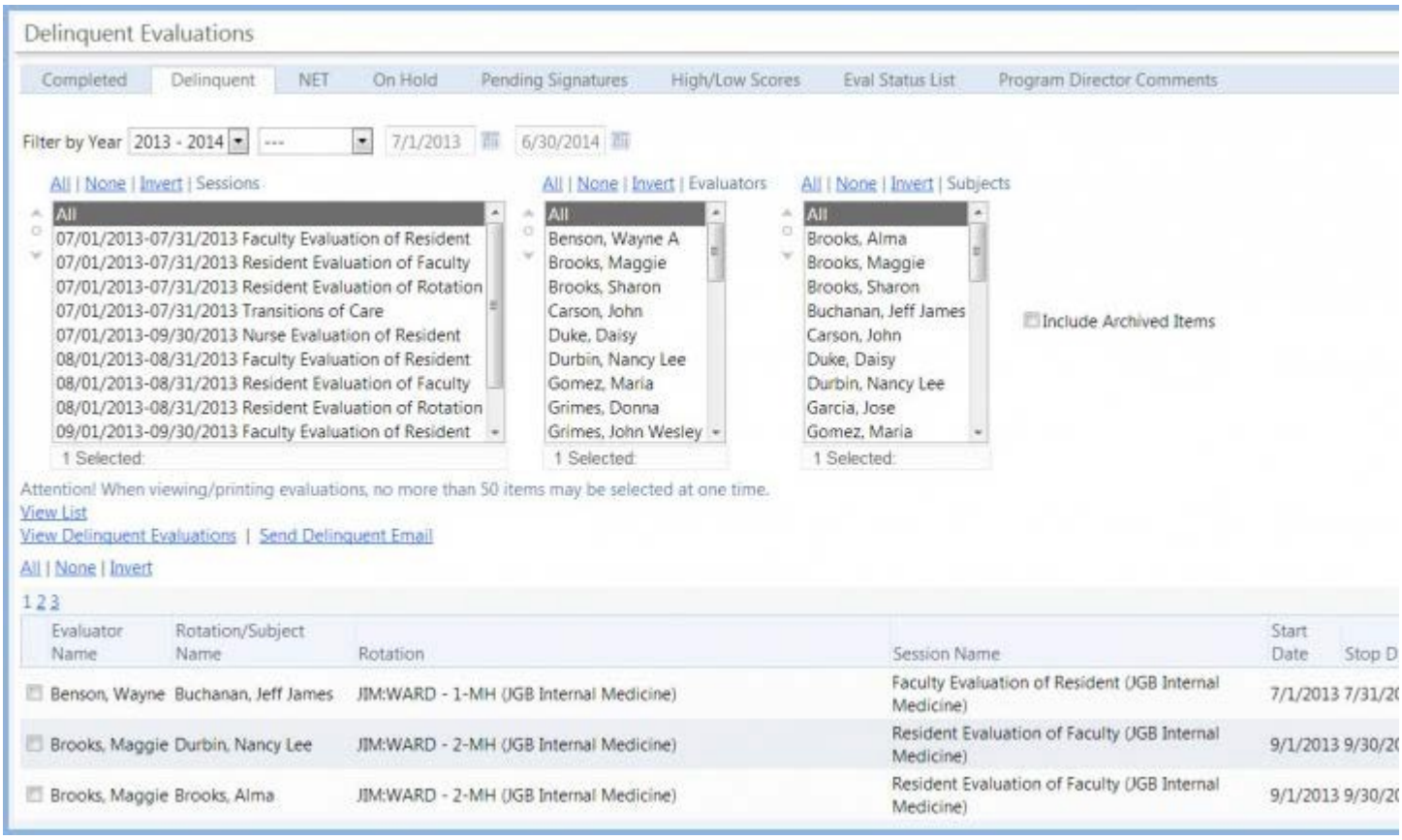


- In the last column, click **Edit Evaluation** to make changes to the completed evaluation.
- Evaluations that are "Totally Anonymous" cannot be edited.
- Evaluations marked with a red asterisk are on hold.

- 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 or Total Anonymity for the evaluation to appear. This protects the anonymity of the evaluators.

VIEW DELINQUENT EVALUATIONS

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**

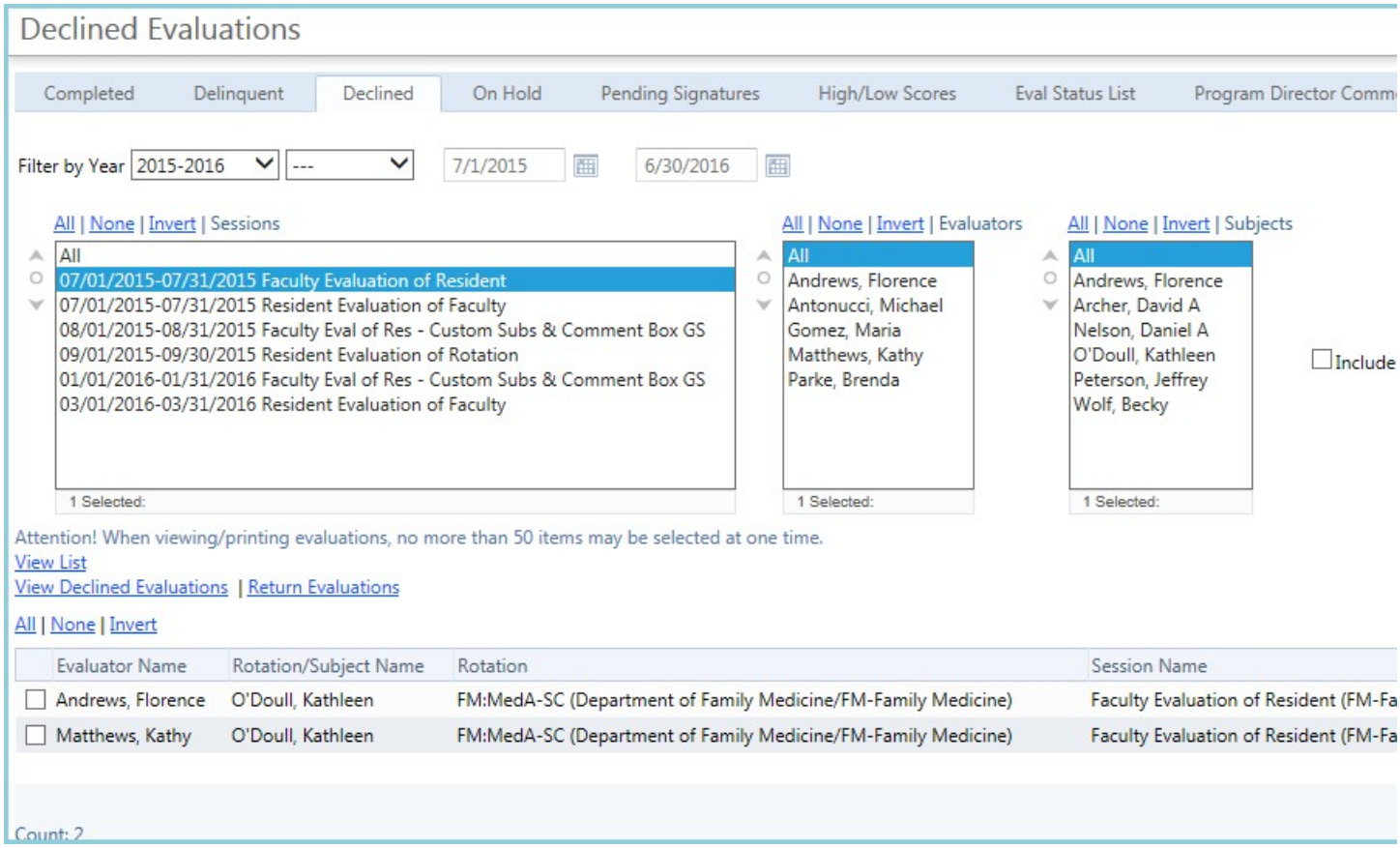


Notes:

- 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.

VIEW DECLINED EVALUATIONS

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**

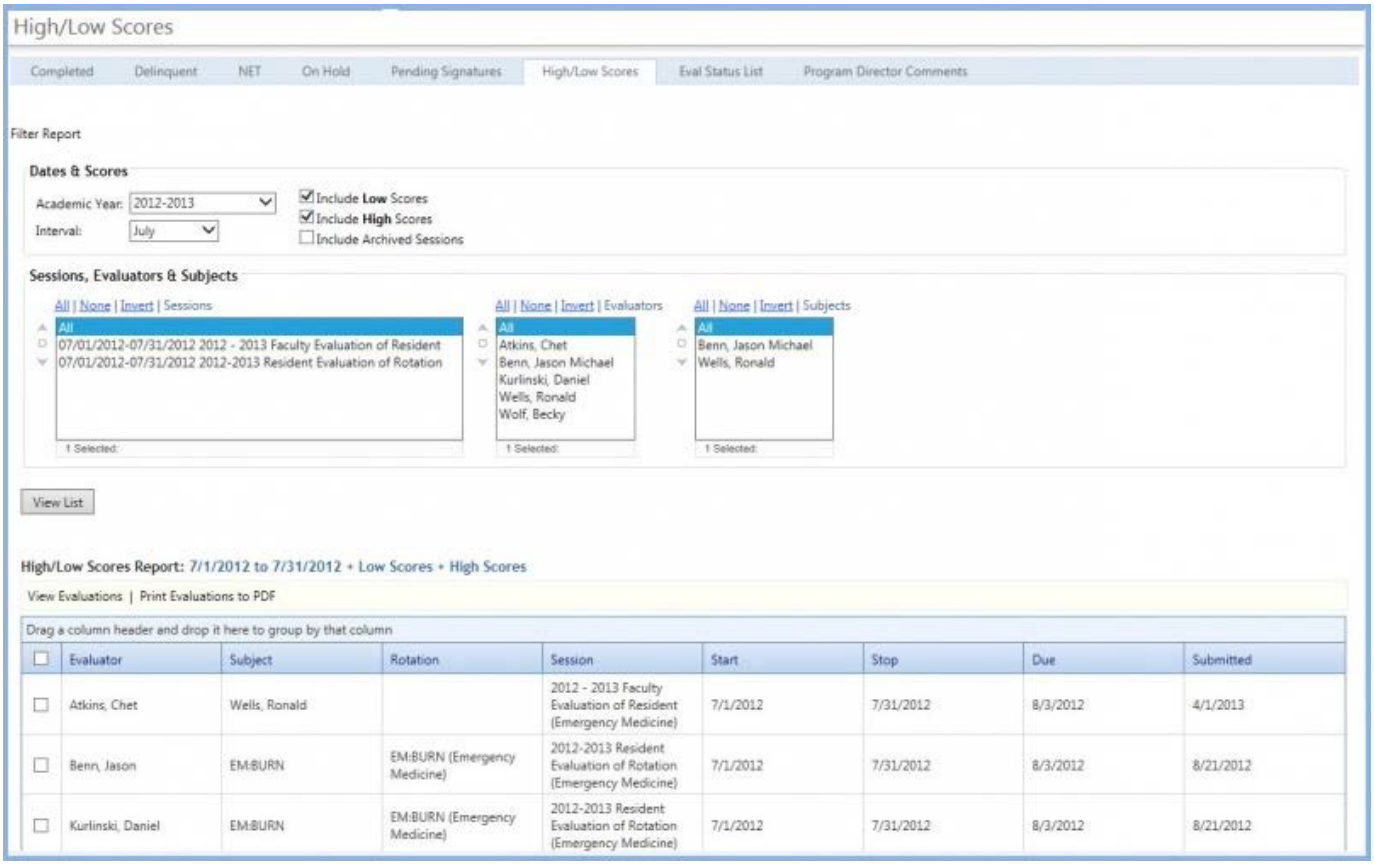


Notes:

- 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

VIEW HIGH/LOW SCORES

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**

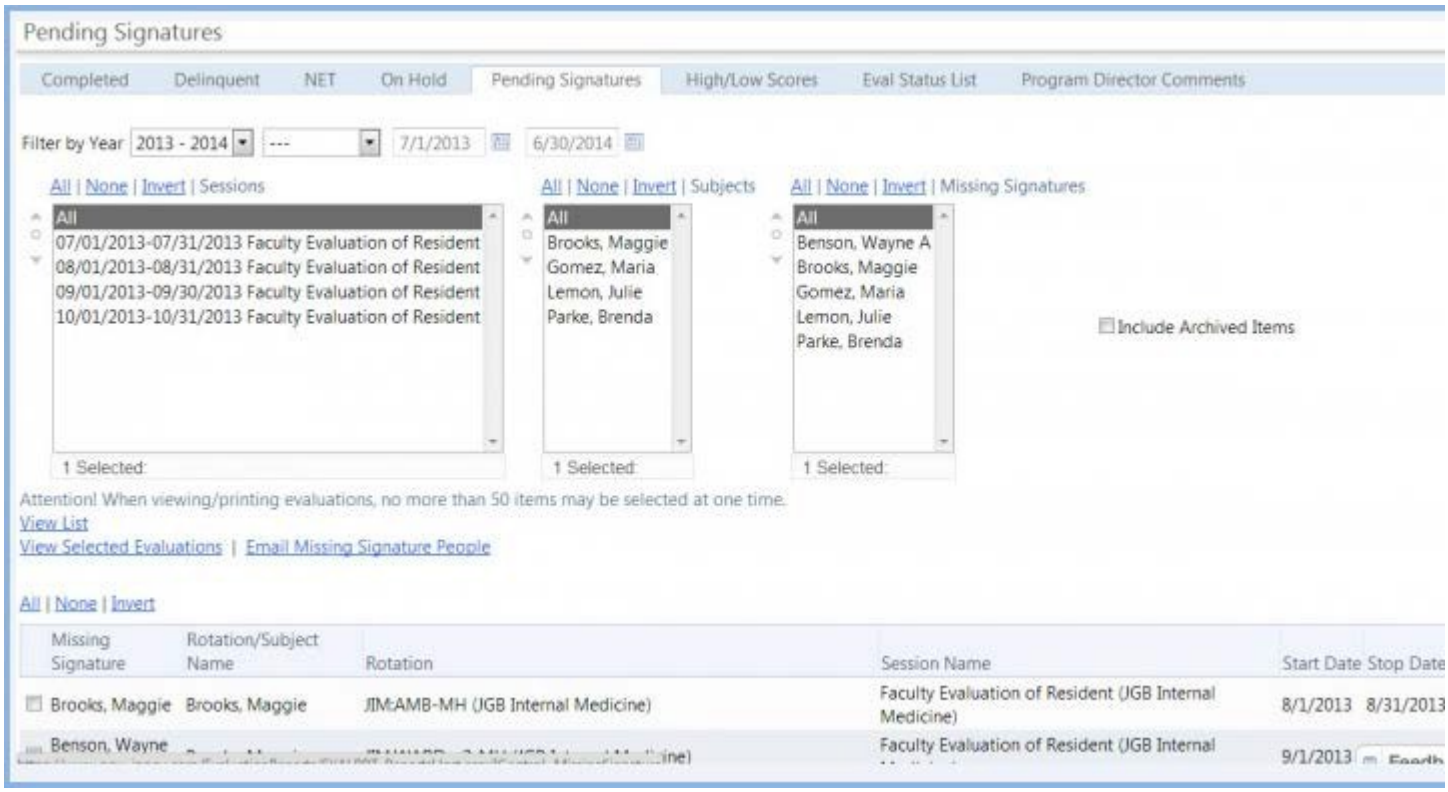


Notes:

- 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.

VIEW PENDING SIGNATURES

1. Go to *Evaluations > View Evaluations*
2. Click the **Pending Signatures** 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 the match and:
- Click **View Selected Evaluations** to view the evaluation.
- Click **Email Missing Signature People** to send a reminder to the signor.

PRINT COMPLETED EVALUATIONS

Overview

There are three ways to print a completed evaluation. Choose the method that is most convenient for you.

Note about printing
We recommend using either an internet browser's built-in PDF Print Driver or using third party PDF Print Driver software. This will give you a better overall experience with creating PDFs. Software specifically designed for this purpose can account for specialized formatting better than the on-page PDF export.

PDF Print Drivers, once installed, work just like printing to a physical printer. Upon viewing a completed evaluation that you wish to save as a PDF, begin the process of printing a page from your computer. This will present you with a list of printers and the name of the PDF driver will display among them. Instead of your default printer, choose the PDF program. A dialog box will display which permits you to choose where on your computer you wish to store the PDF.

Some internet browsers (Google Chrome, for example) already have PDF capability built in, so there is no need to install your own. If your browser does not have one built in, there are many PDF Print Drivers available at no cost. These drivers can be found by doing an internet search or by asking your IT support for a recommendation.

USING CHROME TO PRINT

1. Right click on evaluation and select 'Print' from the menu
2. Under the 'Destination option, click the Change Button
3. Check 'Save as PDF'
4. Chose the location where the eval should be saved
5. Go to the folder where the eval was saved and print from there

View Evaluations

1. Go to *Evaluations > View Evaluations*
2. Make sure you are on the **Completed** tab
3. Select the **Evaluator**
4. Select the **Subject**
5. Click **List All Evaluations**
6. Check the box in front of the evaluation you want to print
7. Select 'Click **View selected evaluations'**
8. Print using your printer or PDF printer

Completed | Delinquent | Declined | On Hold | Pending Signatures | High/Low Scores | Eval Status L

Personal Listing

Filter by Year 2015/2016 --- 7/1/2015 6/30/2016

All | None | Invert | Sessions

All
07/01/2015-07/31/2015 Faculty Evaluation of Resident
08/01/2015-08/31/2015 Faculty Evaluation of Resident

1 Selected:

All | None | Invert | Evaluators

All
Coates, Jeremy
Isknivol, Yrogerg
Pedersen, Niles

1 Selected:

All | None | Invert | Subjects

All
Dack, Nicole

1 Selected:

Attention! When viewing/printing evaluations, no more than 50 items may be selected at one time.

List New Evaluations Only | List ALL Evaluations

View selected evaluations

Do not mark evaluations as viewed

Return selected evals to 'On Hold'

Set as the "Printed" date

Hide evaluation form instructions

Hide identifying information in the header of the anonymous evaluations

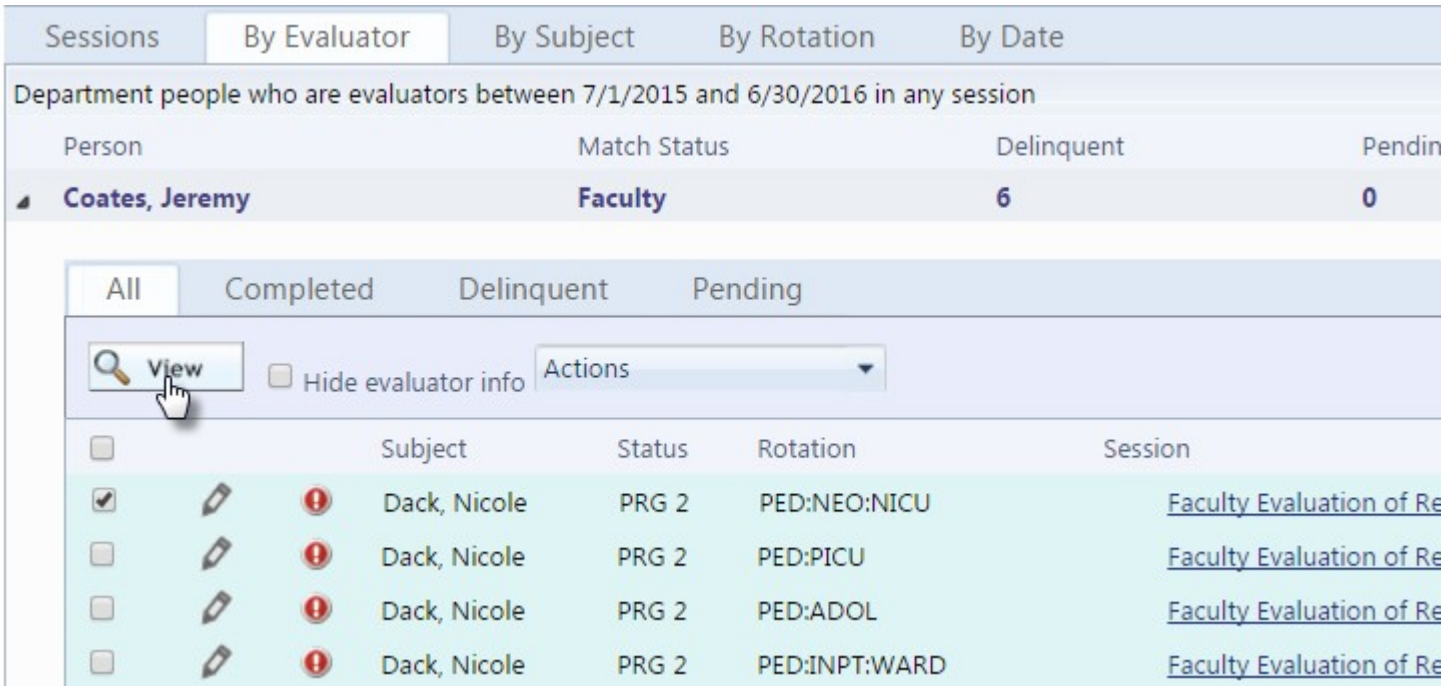
Residency Evaluations

All | None | Invert

	Evaluator Name	Rotation/Subject Name	Rotation
☑	Coates, Jeremy Previously Viewed	Dack, Nicole	PED:COMM PEDS (Department of Pediatrics/PEDS- General Pediatric
☐	Isknivol, Yrogerg Previously Viewed	Dack, Nicole	PED:COMM PEDS (Department of Pediatrics/PEDS- General Pediatric

SESSION MANAGER

1. Go to *Evaluations > Session Manager*
2. Select the correct academic year
3. Click either the **Evaluator**, **Subject** or **Rotation** tab
4. Click the small arrow in front of a person
5. Click on the **Completed** tab
6. Check the box in front of the correct evaluation
7. Select one of these options:
8. Print using your printer or PDF printer



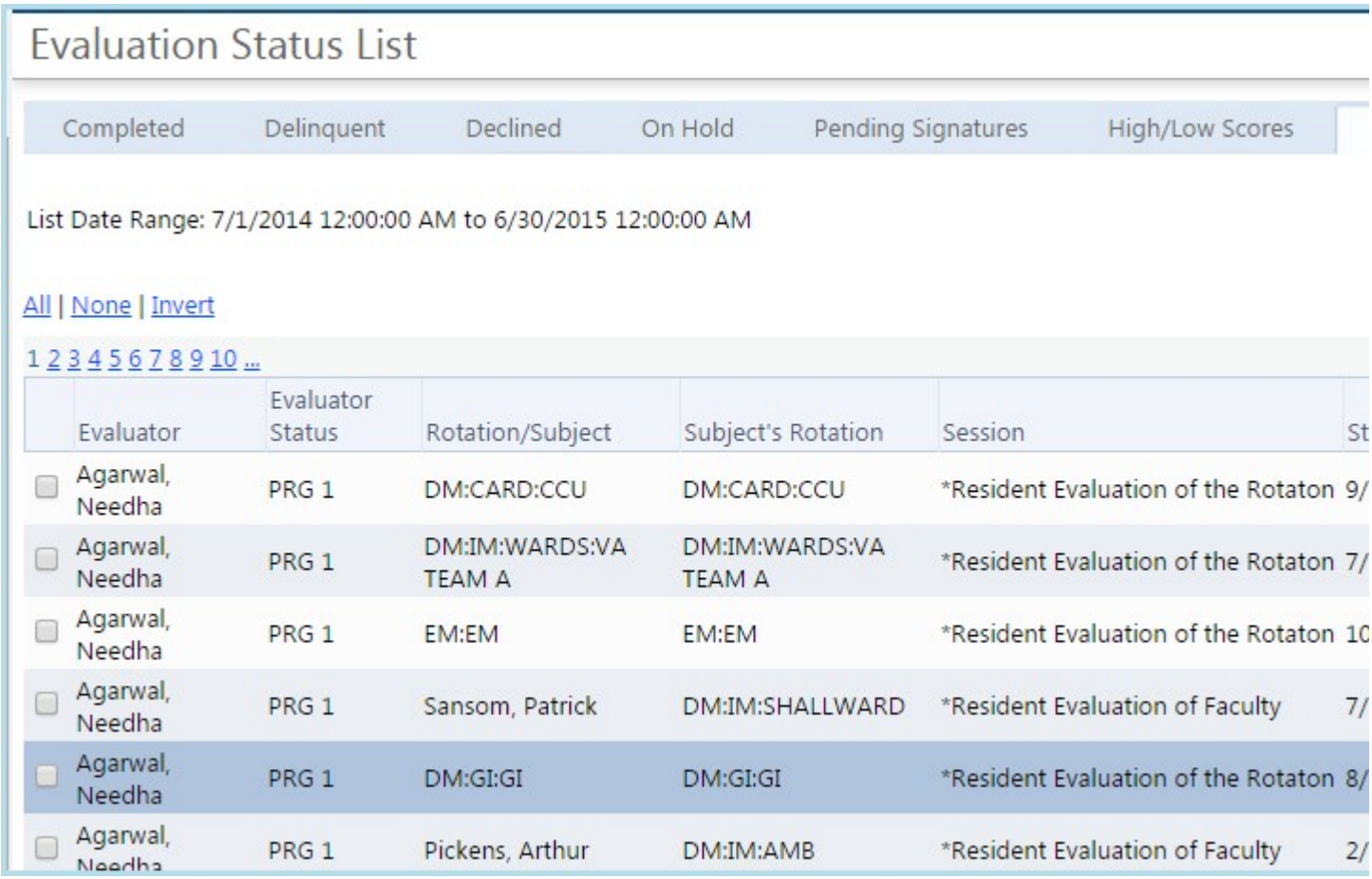
EVALUATION TOOLS - EVALUATION STATUS LIST

Overview

Administrators can view the status of their evaluations to determine if they are completed, delinquent, missing signatures or returned as NET and take various actions on these evaluations.

GENERATE THE STATUS LIST

1. Go to *Evaluations > View Evaluations*
2. Click the **Eval Status List** tab
3. Select the date range or academic year. Click **Next.**
4. Select the Department. Click **Next.**
5. Show matches where the selected people are the: Evaluator, Subject, Evaluator or Subject. Click **Next.**
6. Select the status types of the people you want to see. Click **Next.**
7. Select a session(s). Click **Next.**
8. Select a person (people). Click **Next.**
9. Choose the columns to display. Click **Next.**
10. The columns and data are displayed



Evaluation Status List

Completed | Delinquent | Declined | On Hold | Pending Signatures | High/Low Scores

List Date Range: 7/1/2014 12:00:00 AM to 6/30/2015 12:00:00 AM

All | None | Invert

1 2 3 4 5 6 7 8 9 10 ...

	Evaluator	Evaluator Status	Rotation/Subject	Subject's Rotation	Session	St
☐	Agarwal, Needha	PRG 1	DM:CARD:CCU	DM:CARD:CCU	*Resident Evaluation of the Rotaton	9/
☐	Agarwal, Needha	PRG 1	DM:IM:WARDS:VA TEAM A	DM:IM:WARDS:VA TEAM A	*Resident Evaluation of the Rotaton	7/
☐	Agarwal, Needha	PRG 1	EM:EM	EM:EM	*Resident Evaluation of the Rotaton	10
☐	Agarwal, Needha	PRG 1	Sansom, Patrick	DM:IM:SHALLWARD	*Resident Evaluation of Faculty	7/
☐	Agarwal, Needha	PRG 1	DM:GI:GI	DM:GI:GI	*Resident Evaluation of the Rotaton	8/
☐	Agarwal, Needha	PRG 1	Pickens, Arthur	DM:IM:AMB	*Resident Evaluation of Faculty	2/

TAKE ACTION:

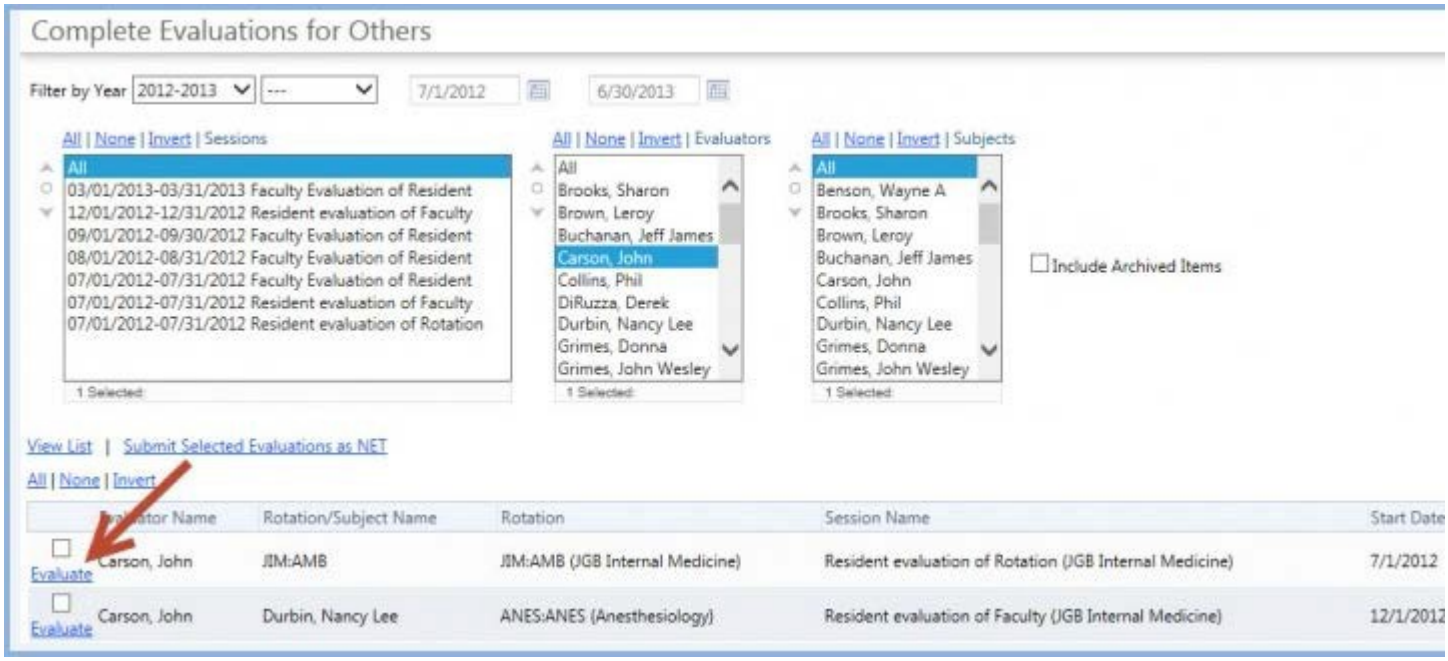
- **Evaluate** - Opens the evaluation for completion.
- **Edit Evaluation** - Opens a completed evaluation for editing
- **Export to Excel** - Sends data to Excel spreadsheet
- Check the box(es) in front of the names and select these links:
- Delete selected items
- Place selected items back On Hold
- Release selected items from On Hold
- View/print selected items
- Return NET evaluations to evaluators
- Send Delinquent reminders for selected items

COMPLETE EVALUATIONS FOR OTHERS

Overview

You can complete evaluations for people who either cannot or will not complete evaluations on line. For example, Administrators can enter the results of a patient survey or a faculty member completed a paper copy of the evaluation and returned the completed form.

1. Go to *Evaluations > Tools > Complete for Others*
2. From Evaluators dropdown list, select the evaluator's name
3. Click **View List**
4. Find the correct evaluation and click **Evaluate**
5. Complete the evaluation and click **Submit Final** when finished
6. The system marks the evaluation as 'Updated by' the person who submitted the form with the date submitted.



Note:

- Because Program Evaluations are totally anonymous, the 'Complete Evaluations for Others' tool is not available for matches created in a Program Evaluation session.

Metro Minnesota Council

on Graduate

Medical Education

RMS Evaluations Module Training

Evaluation Reports

TABLE OF CONTENTS

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612-624-0750

RESIDENTS

There are four overall program reports that display the evaluation data about the residents in a program. These reports are Performance, Competency, Compliance and Subcompetency. The default time frame is for the current academic year.

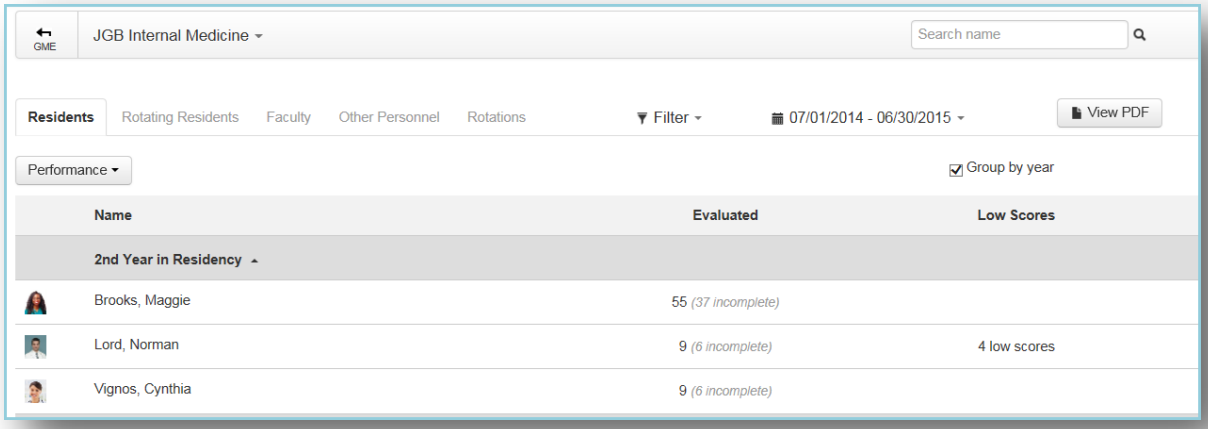
PERFORMANCE REPORT

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. If you have access to more than one program, select a program from the dropdown list
3. By default, you'll land on the **Residents** tab
4. By default, you'll be on the **Performance Report**
5. Residents are grouped by 'Year in Residency.' Uncheck the box for 'Group by Year' to view the residents in alphabetical order.

This report displays:

- Name - The residents' names and pictures are shown
- 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 yet been completed
- Low Scores - The number of low scores that the resident has received



COMPETENCY REPORT

The program-level Competency Report displays competency data collected about the residents. To be included in this report, these three criteria must be met:

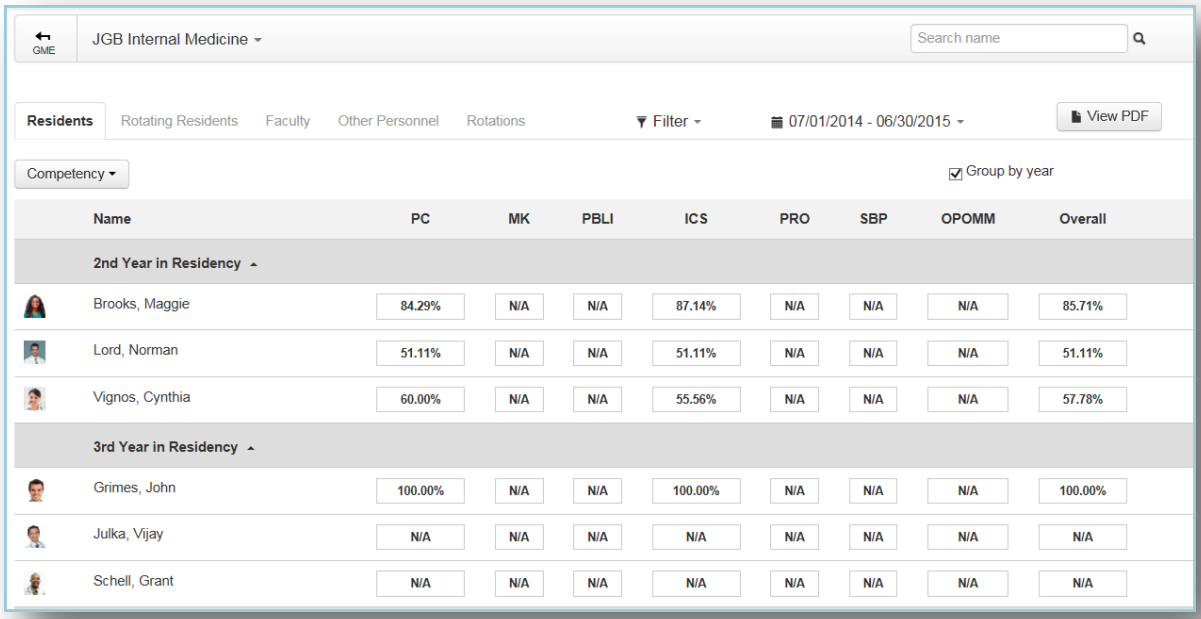
- General questions only – This excludes milestones, EPAs, subcompetencies and custom subcompetencies
- Questions that are tagged to Core Competencies and
- Questions that use a 'Rating' grade scale only

Generate the program-level Competency Report:

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

This report displays the following information:

- Name - The residents' names and pictures are shown. Residents are grouped by Year in Residency. Uncheck the box for **Group by Year** to view all residents in alphabetical order.
- Core Competencies – Each resident's level of competency is shown as a percentage for each Core Competency (PC - Patient Care, MK - Medical Knowledge, etc.) (Note: OPOMM stands for Osteopathic Principles and Practices and Manipulative Medicine.)
    - Calculations - All results are converted to percentages and then averaged.
    - Example - On two Patient Care questions, a resident receives a 3 on a scale of 1 - 5 and a 7 on a scale of 1 - 9. The 3 is converted to 60% and the 7 is converted to 77.78%. These are then averaged ((60 + 77.78)/2) for a score of 68.89% in Patient Care.
- Overall - This score is an average of all competency 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.



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 and
- The Due Date is in the past

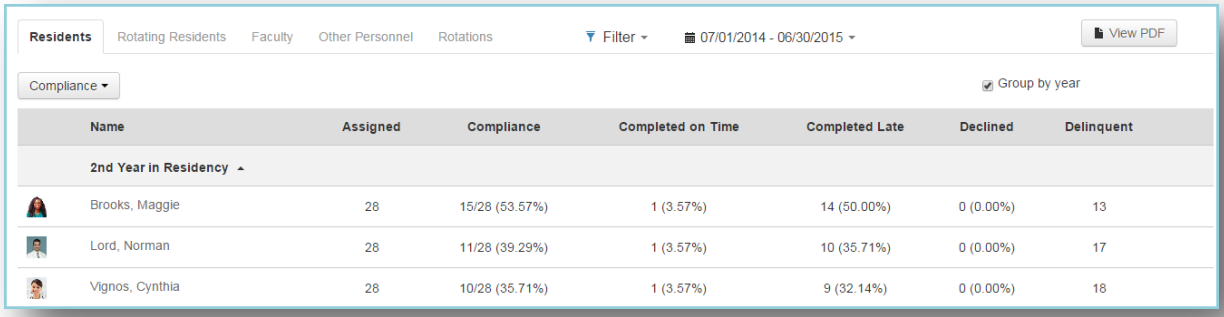
Generate the program-level Compliance Report:

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 residents' names and pictures are shown, grouped by 'Year in Residency.' Uncheck the box for 'Group by Year' to view all residents in alphabetical order.
- Assigned - The total number of evaluations assigned to the resident for the date range of the report
- Compliance - The total number of declined and completed evaluations divided by the total number assigned to the resident; In parenthesis, the percentage of completed evaluations is displayed
    - Calculations - The number of evaluations that were declined or 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%).
- Declined - The number and percentage of evaluations returned (declined) by the evaluator
    - Calculations - The number of evaluations that were declined divided by the total number of assigned evaluations
    - Example - A resident has 30 evaluations assigned to her with Due Dates in the past. She declined (returned) 5 of them. Five divided by 30 equals 16.67%. Her 'Declined' 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



Name	Assigned	Compliance	Completed on Time	Completed Late	Declined	Delinquent
2nd Year in Residency						
Brooks, Maggie	28	15/28 (53.57%)	1 (3.57%)	14 (50.00%)	0 (0.00%)	13
Lord, Norman	28	11/28 (39.29%)	1 (3.57%)	10 (35.71%)	0 (0.00%)	17
Vignos, Cynthia	28	10/28 (35.71%)	1 (3.57%)	9 (32.14%)	0 (0.00%)	18

SUBCOMPETENCY REPORT

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

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

Generate the program-level 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 residents' names and pictures are 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, such as PC (Patient Care) and MK (Medical Knowledge). 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, general 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 general questions to a 1 - 5 grade scale. The following formula is used to normalize grade scales on general questions that are other than 1 - 5. All the scores are then averaged.

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

Where:

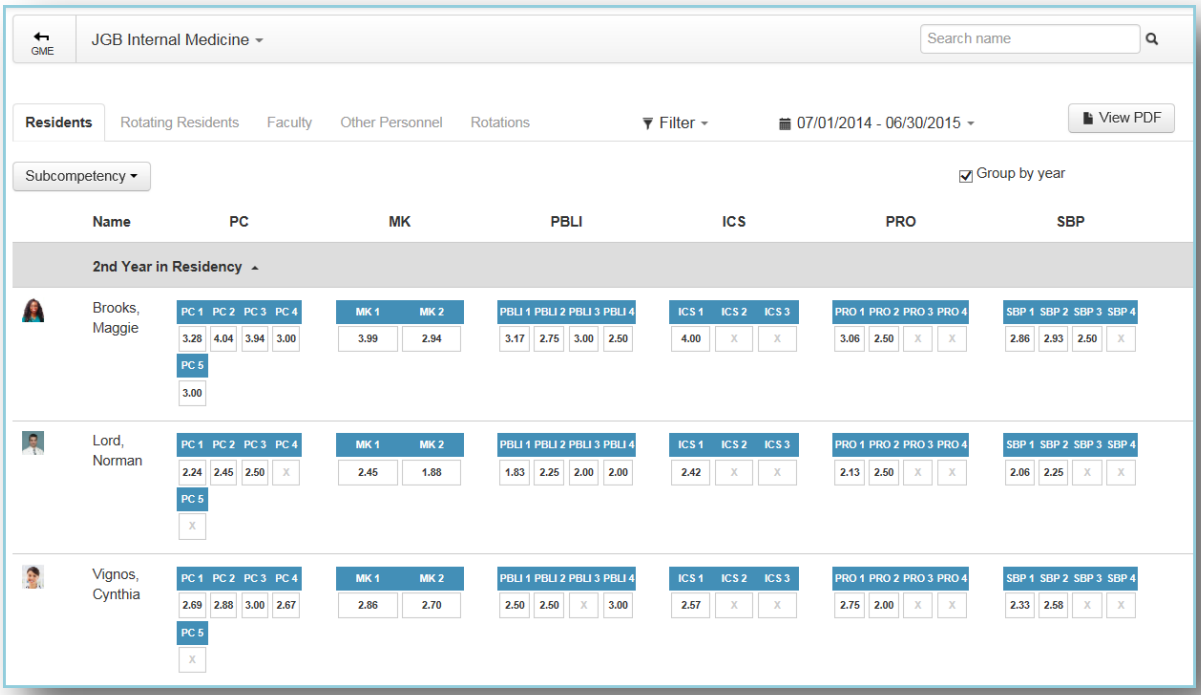
m = Minimum Milestone Value (0 or 1)
M = Maximum Milestone Value (4 or 5)
p = Rating scale position (selection chosen by evaluator)
n = Number of choices on the grade scale

- 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 - General 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. In the General Features section of this document, read 'Assessment Settings' for more details about this process and to change the settings.
- For those subspecialties that have a 'Has not achieved Level 1' (or similar wording) option in their subcompetencies, these responses can be counted as 'zero' and included in both the resident's average and the Peer Average. In the General Features section of this document, read 'Assessment Settings' for more details about this process and to change the settings.

Below is an example of a program-level Subcompetency Report for Internal Medicine. The number of subcompetencies under each Core Competency will vary for each program specialty.

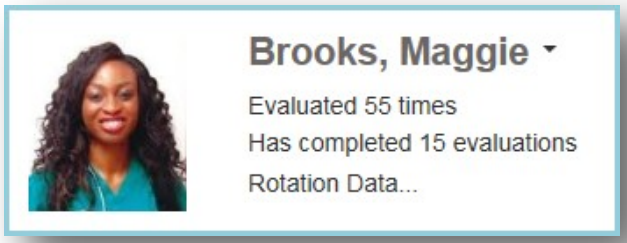


There are nine Evaluation Reports that provide detailed evaluation information about a specific resident. Click on a resident's name in any of the program-level reports to view more details.

The resident's name and photo will appear at the top left of the report, along with the following information:

- Total number of times this resident has been evaluated for the date range of the report
- Total number of evaluations completed by this resident during the date range of the report
- Hover over **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.



OVERALL REPORT

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

Generate the Overall Report:

1. Go to *Evaluations > Reports*
2. Select a Resident
3. You'll land on the **Overall** tab

The first column on the Overall Report includes:

- Form - Name of each evaluation form
- Question - Shows the actual question text from each evaluation form
- Grade Scale used
- Comments submitted by evaluators on this question

The remainder of the page will display different information depending on the grade scale used. We'll explore the results of each type of grade scale below. Check the box for 'Scoring Details' to view a graphic display of the results.

RESULTS FROM VARIOUS GRADE SCALES

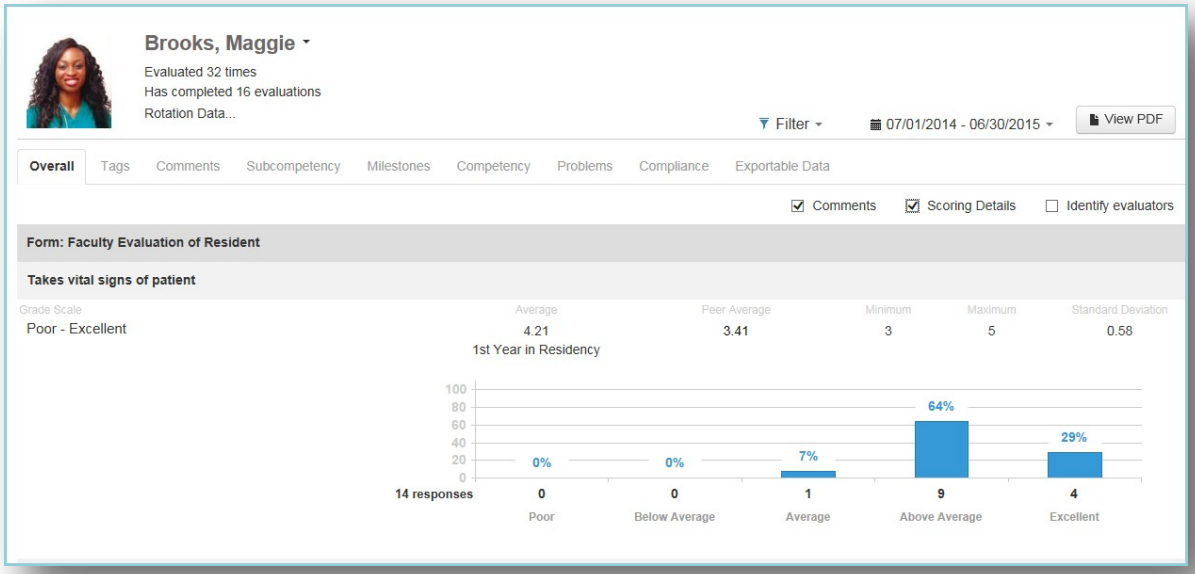
Results from a Ratings Grade Scale – Select from a Range of Scores (Low to High)

Evaluators choose an answer from a rating scale that ranges from negative to positive connotations. The results are shown in the following columns:

- 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 score 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. The Peer Average will still appear on the report even if the Settings do not allow residents to view the Peer Average. In the General Features section of this document, read 'Assessment Settings' for more details.
- Minimum - Displays the lowest score given to the resident for that question
- Maximum - Shows the highest score given to the resident for that question
- Standard Deviation - Displays the variation or dispersion of the results from the average score for that question

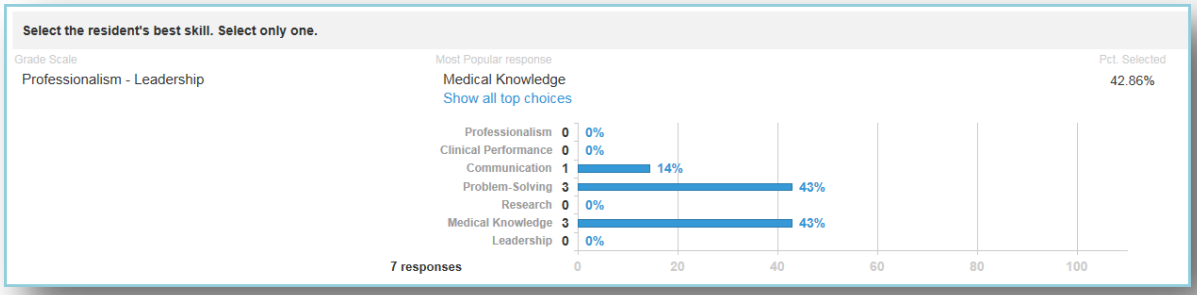
On the example shown below, faculty chose from a 1 – 5 scale (Poor to Excellent) to rate the resident on this question. The resident received:

- 1 'Average' score for 7% of the scores received
- 9 'Above Average' scores for 64% of the scores received
- 4 'Excellent' scores for 29% of the scores received



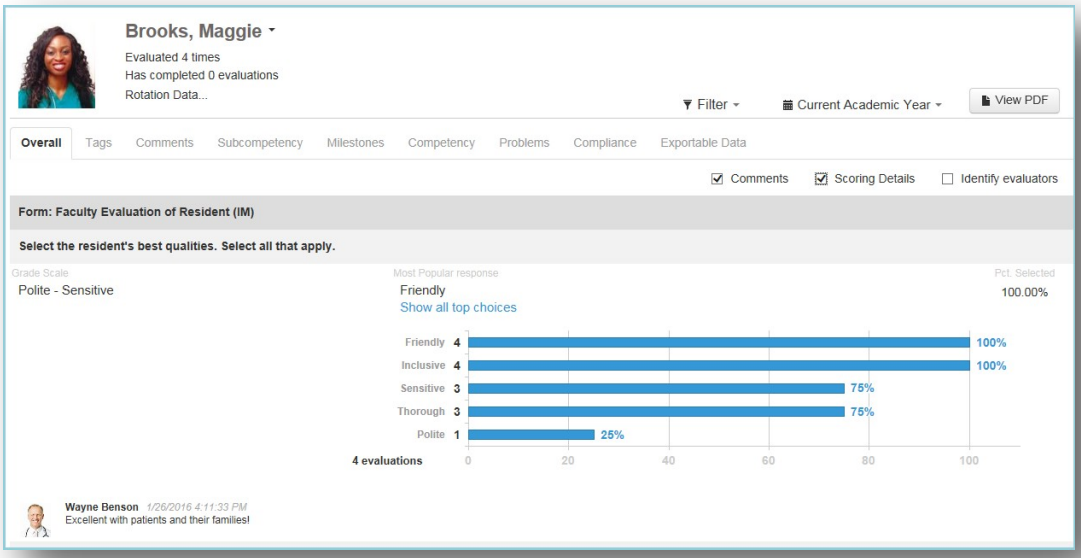
Results from a Multiple Choice Grade Scale – Select Best Answer

When evaluators are given the choice to select just one item from a list, the option that received the most 'votes' will be shown under the 'Most Popular Response' column. If there is a tie, click **Show all top choices** to see the winning selections. In this example, the resident's best skill is a tie between 'Problem-Solving' and 'Medical Knowledge.'



Results from a Multiple Choice Grade Scale – Select All That Apply

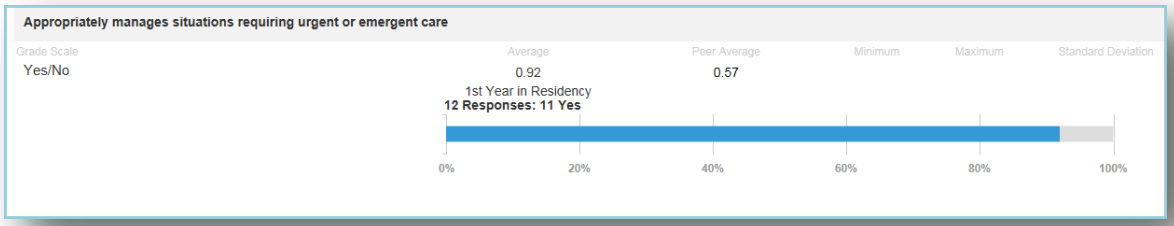
When evaluators are given the option to select 'All that apply' from a multiple-choice list, the option that received the most 'votes' will be shown in the 'Most Popular response' column. In the example below, four faculty members completed this question by selecting multiple good qualities of the resident. They chose 'Friendly' and 'Inclusive' 100% of the time, while 'Sensitive' and 'Thorough' were chosen by 75% of the faculty members (3 out of 4). When there is a tie, click **Show all top choices** to see the selections that tied for first place.



Results from a Yes/No Grade Scale – Select Yes/No, True/False, Pass/Not Pass

Evaluators are asked to select one of two choices. On the Milestone question shown below, the resident received:

- Eleven 'Yes' responses and one 'No' response out of twelve total responses
- Any 'Yes' response counts as a '1' and 'No' responses count as a '0'
- The resident's average (11/12) is 0.92 (92%), while the Peer Average is 0.57 (57%)

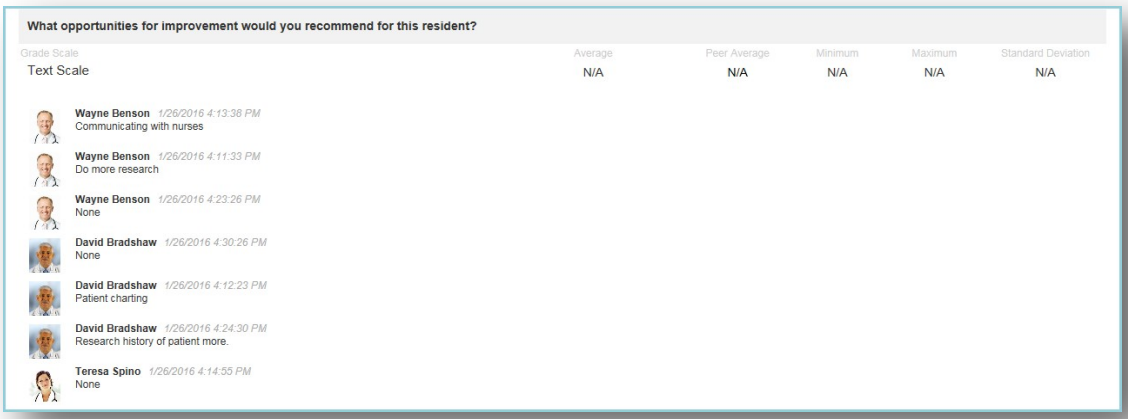


Results from a Number Grade Scale – Enter a Numeric Value

When evaluators are asked to submit a number as a response, the system computes the average of all responses given. In this example, the faculty members were asked how many days they spent with the resident during the rotation. The average number of days was 26.71 days.

Results from a Text Grade Scale – Enter a Written Response

With this type of grade scale, evaluators are asked to give a written response to a question. In the screenshot below, faculty members were asked what improvements the resident could make. The report shows that it was a 'Text Scale' and lists the responses given by the evaluators. No numeric values are shown for Average, Peer Average, Minimum, etc.

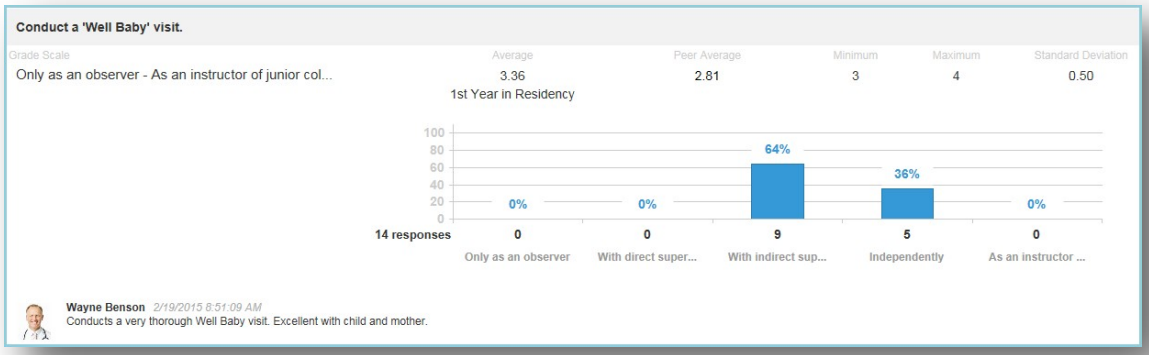


RESULTS FROM SPECIALIZED QUESTIONS

The Evaluation Reports will display the results of any specialized questions on your assessment forms.

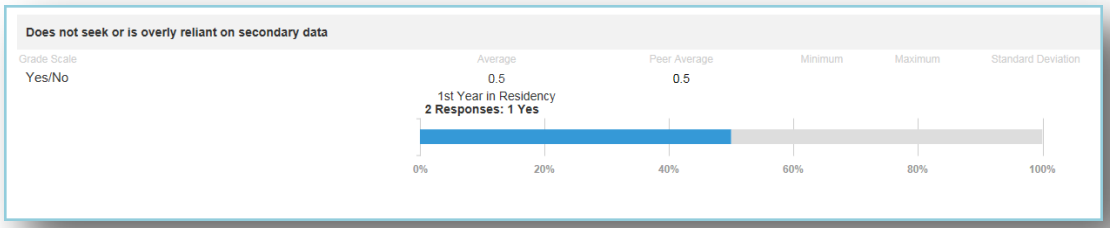
Results from EPA (Entrustable Professional Activity) Questions

On the EPA example below, the Entrustment Scale is displayed showing 14 total responses received, the percentage received for each level and the actual number of times that level was selected.



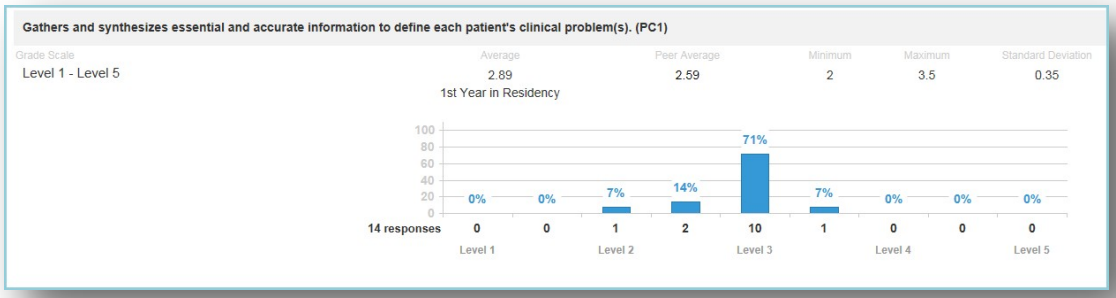
Results from Milestone Questions

Milestone questions will display the total number of responses received for the question and the number and percentage of 'Yes' responses received.



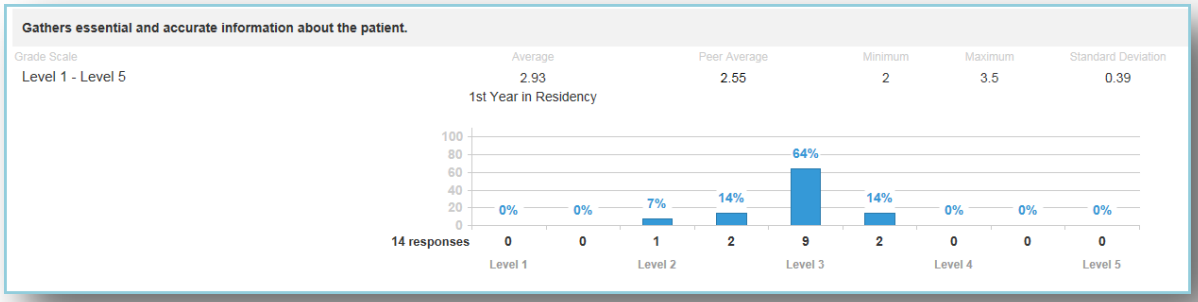
Results from Subcompetency Questions

The results from Subcompetency questions will display the total number of responses received, the percentage received for each level and the number of responses for each level.



Results from Custom Subcompetency Questions

The results from Custom Subcompetency questions will display the total number of responses received, the percentage received for each level and the number of responses for each level.



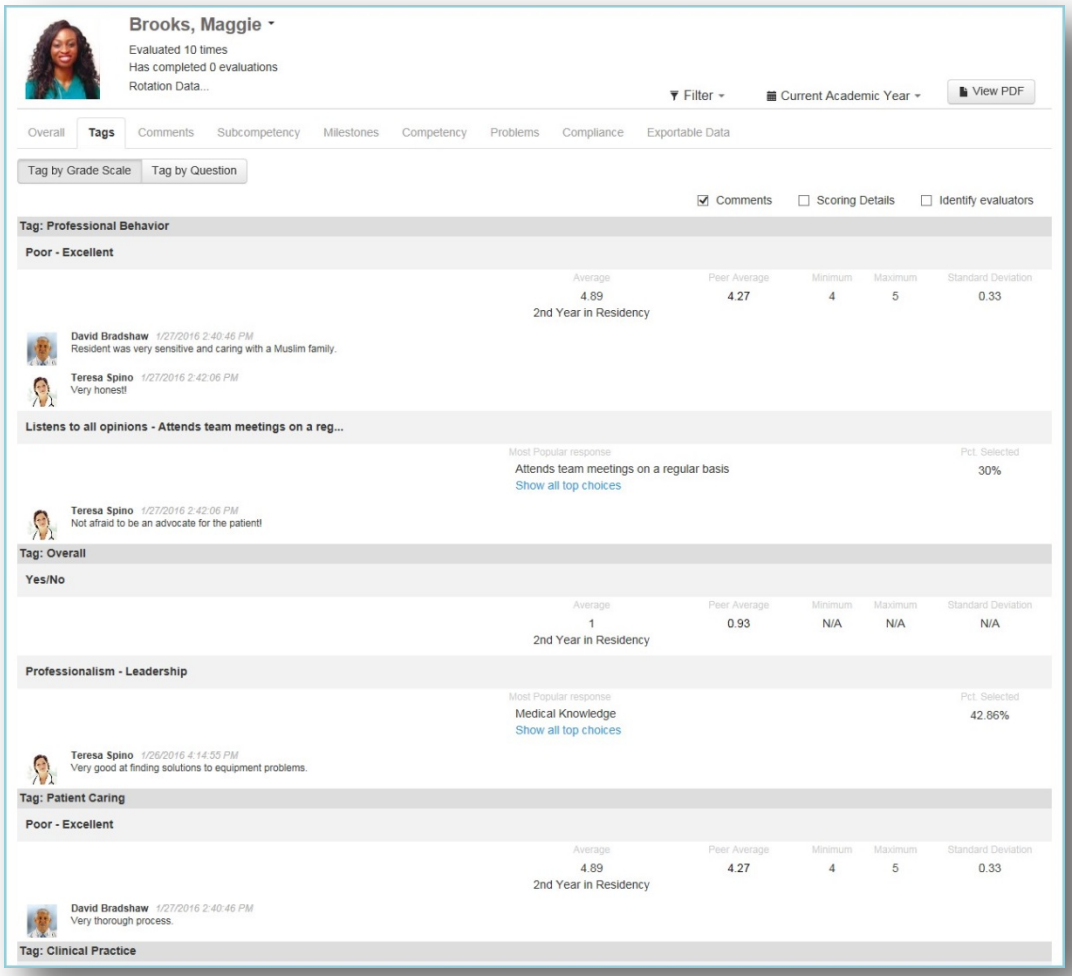
TAGS REPORT

The Tags report displays the results from Custom Tags placed on General questions (in your own words). The data can be grouped under two formats:

- Tag by Grade Scale
- Tag by Question

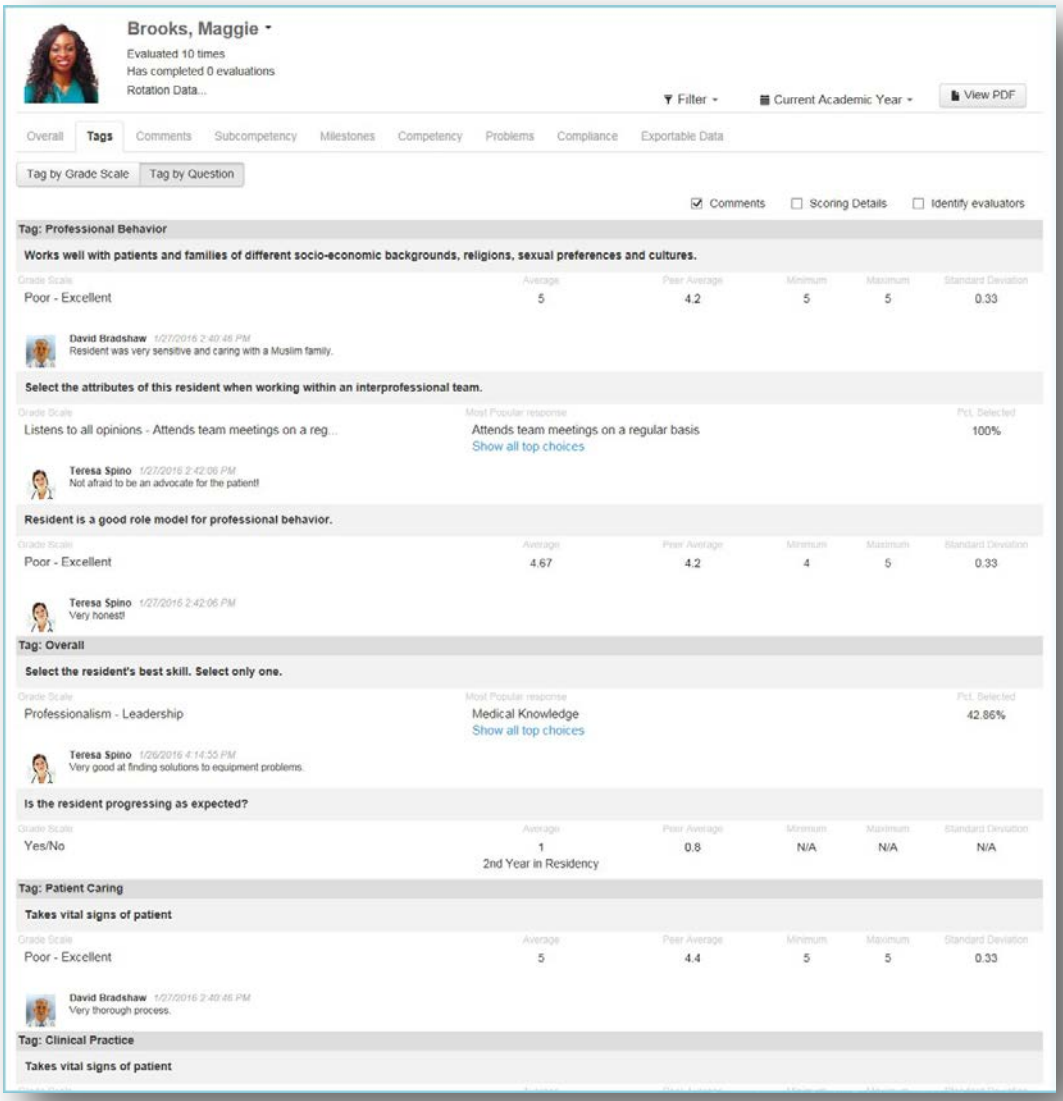
Generate the 'Tag by Grade Scale' Report:

1. Go to *Evaluations > Reports*
2. Select a resident
3. Click the **Tags** tab
4. Select **Tag by Grade Scale**
5. Check the box for 'Scoring Details' to view a graphical representation of the results



Generate the 'Tag by Question' report:

1. Go to *Evaluations > Reports*
2. Select a resident
3. Click the **Tags** tab
4. Select **Tag by Question**
5. Check the box for 'Scoring Details' to view a graphical representation of the results



COMMENTS REPORT

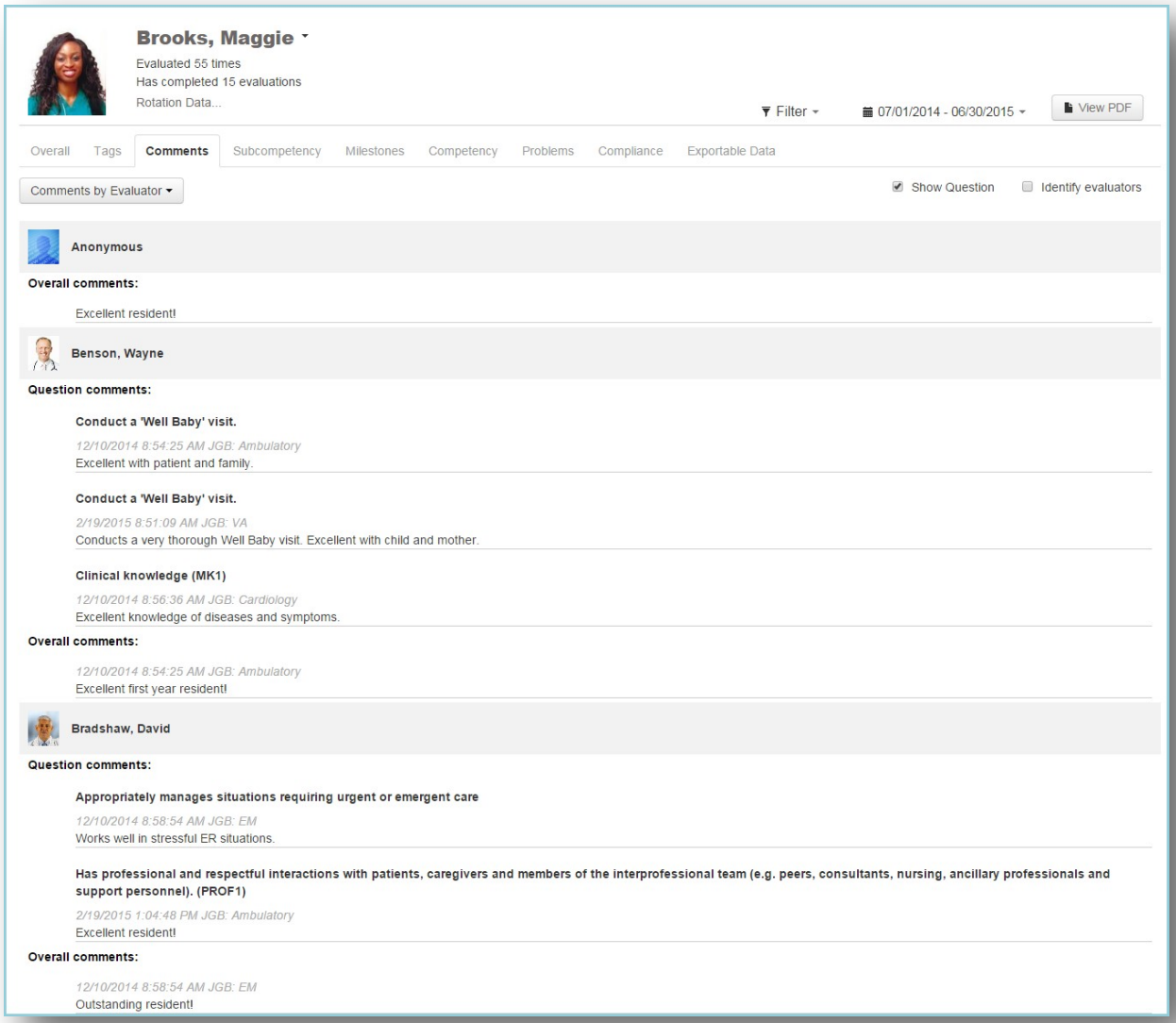
There are four reports that can be generated to show evaluators' comments about your residents. These reports allow the comments to be grouped according to Evaluator, Rotation, Tag or Evaluation Form.

Comments by Evaluator

The comments are grouped under each Evaluator showing first the comments submitted on specific Questions, and then the Overall comments. Evaluations marked as 'Anonymous' will display the comments, but not the Evaluator's name or picture. Check the box for 'Identify Evaluators' to view the identifying information.

Generate the Comments by Evaluator Report

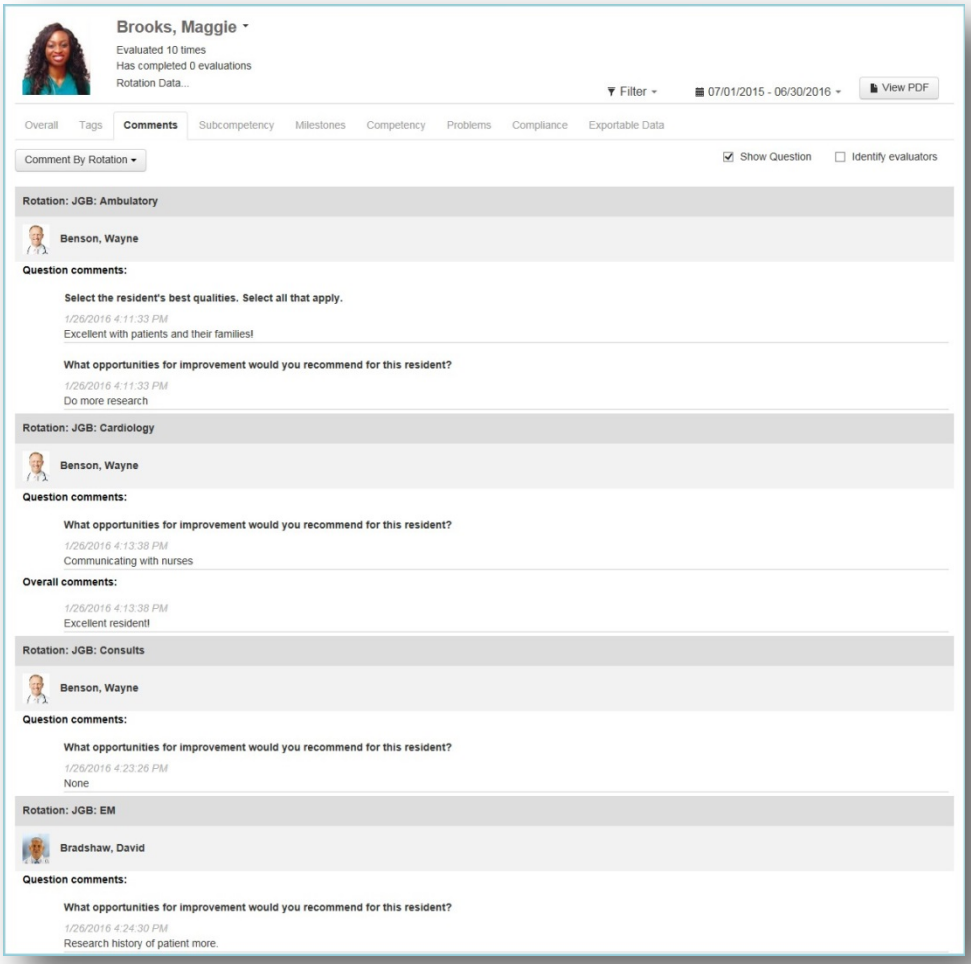
1. Go to *Evaluations > Reports*
2. Select a resident
3. Click the **Comments** tab
4. By default, you'll be on the 'Comments by Evaluator' report



Comments by Rotation

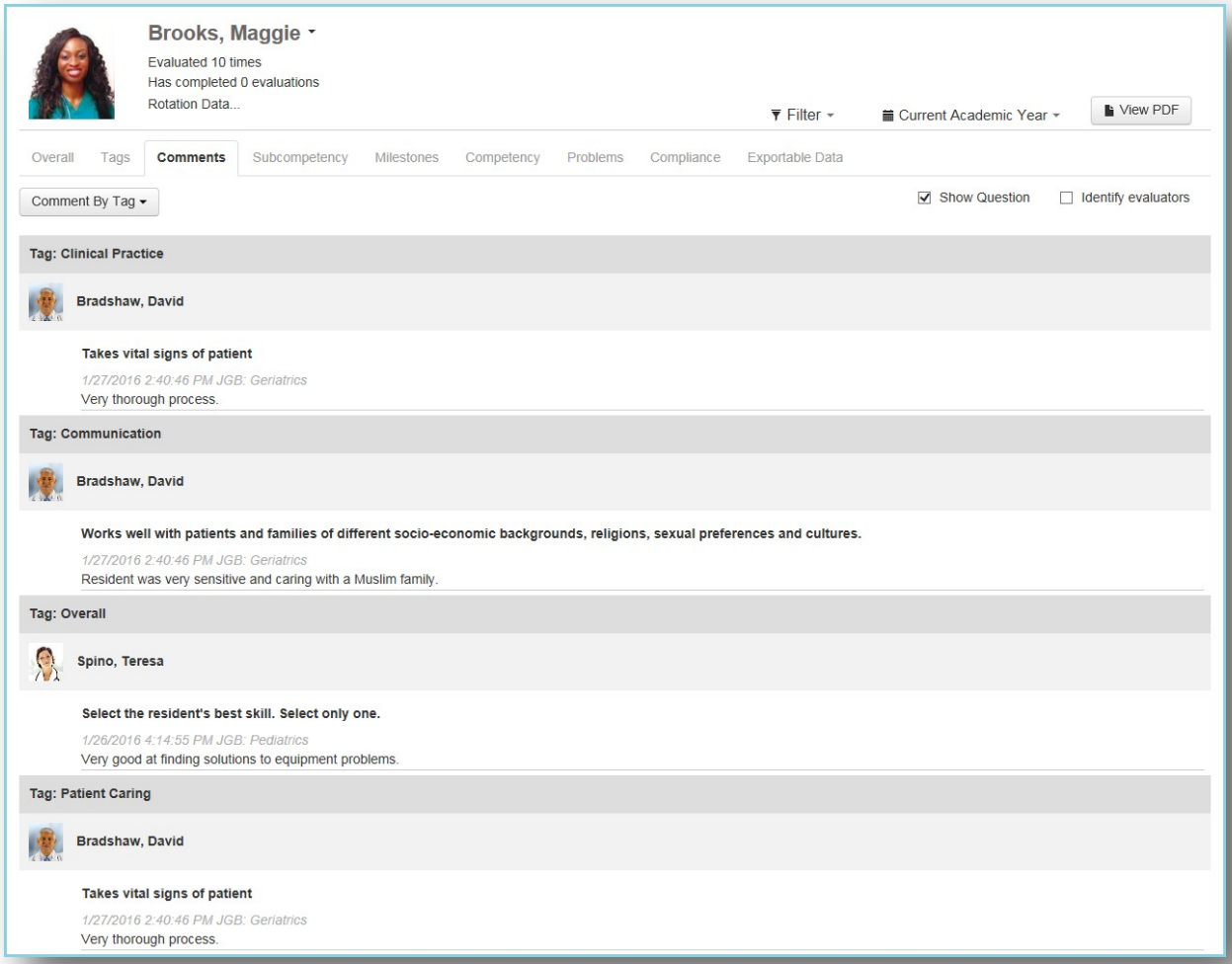
From the dropdown list, select **Comments by Rotation**. On this report the comments are grouped under the Rotations on completed evaluations for the time period of the report. The comments that were submitted on Questions will be displayed first, followed by the Overall comments.

Evaluations marked as 'Anonymous' will display the comments, but any identifying information (evaluator or rotation) will not be shown. Check the box for 'Identify evaluators' to show the evaluator information. If you choose not to show the identifying information, you lose the ability to group the comments by rotation.



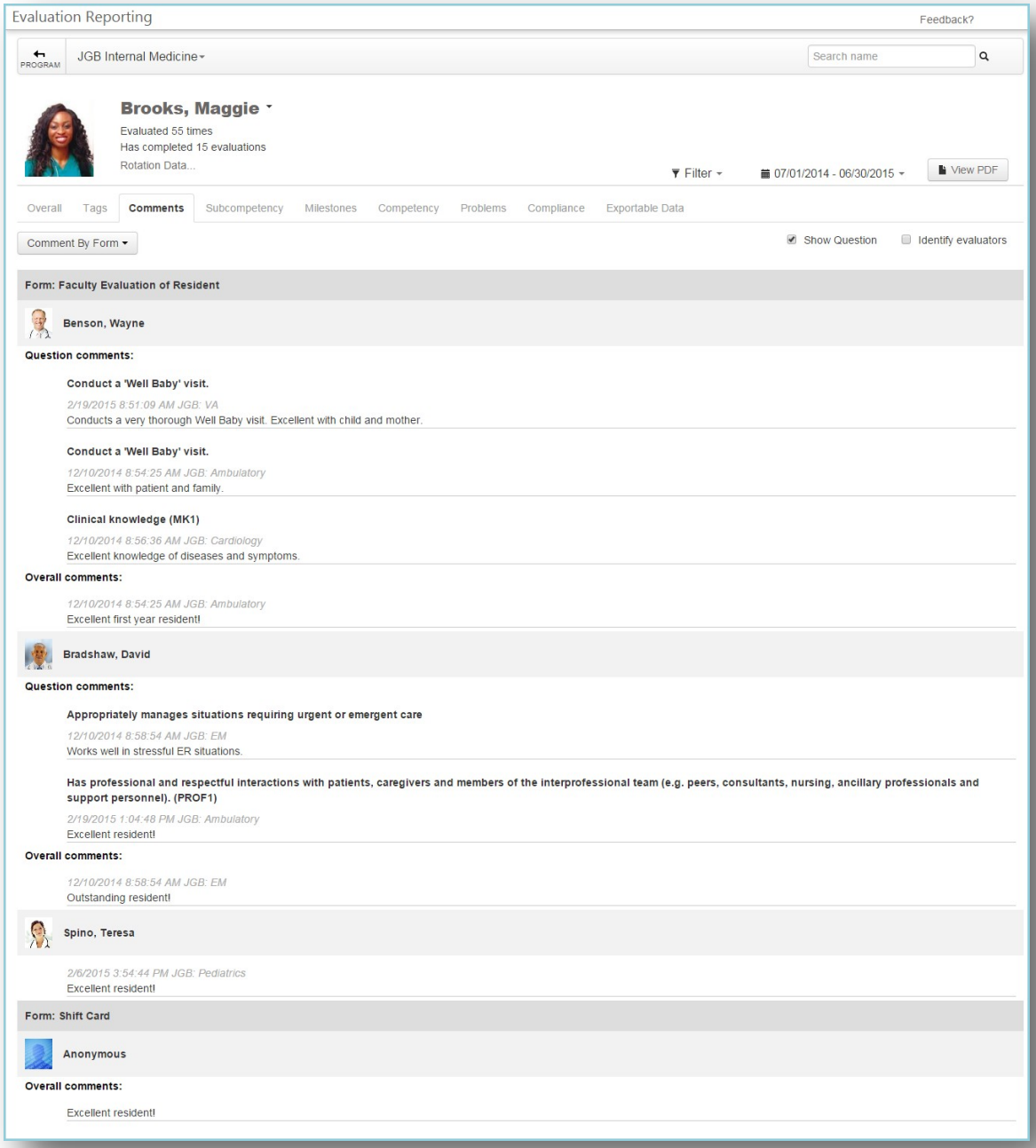
Comments by Tag

From the dropdown list, select **Comments by Tag**. Comments are grouped and displayed by Custom Tags only.



Comments by Form

In this report, the comments are grouped by the Evaluation Form used to evaluate the resident. The name of the form is shown in the grey heading bars. The comments that were submitted on specific Questions will be displayed first and then the Overall comments. Evaluations marked as 'Anonymous' will display the comments, but will not show the Evaluator's name and picture. Check the box for 'Identify evaluators' to view evaluator information.



SUBCOMPETENCY REPORT

The Subcompetency Report displays the results of evaluations completed about the residents where the evaluation forms contained the following:

- Actual ACGME subcompetencies inserted on the evaluation form, either manually or rotation-based
- Responses from questions tagged or mapped to subcompetencies, such as EPAs, custom subcompetencies and general 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 (Patient Care, Medical Knowledge, etc.) has its own column. Within each column the subcompetencies are displayed (PC1, PC2, etc.) 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, general 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 general 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 = Rating scale 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 - General 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. In the General Features section of this document, read ‘Assessment Settings’ for more details about this process and how to change the settings.
- For those subspecialties that have a 'Has not achieved Level 1' option in their subcompetency, these responses can be counted as 'zero' and included in the resident's average. In the General Features section of this document, read ‘Assessment Settings’ to learn more details about this process and how to change the settings.

MILESTONES REPORT

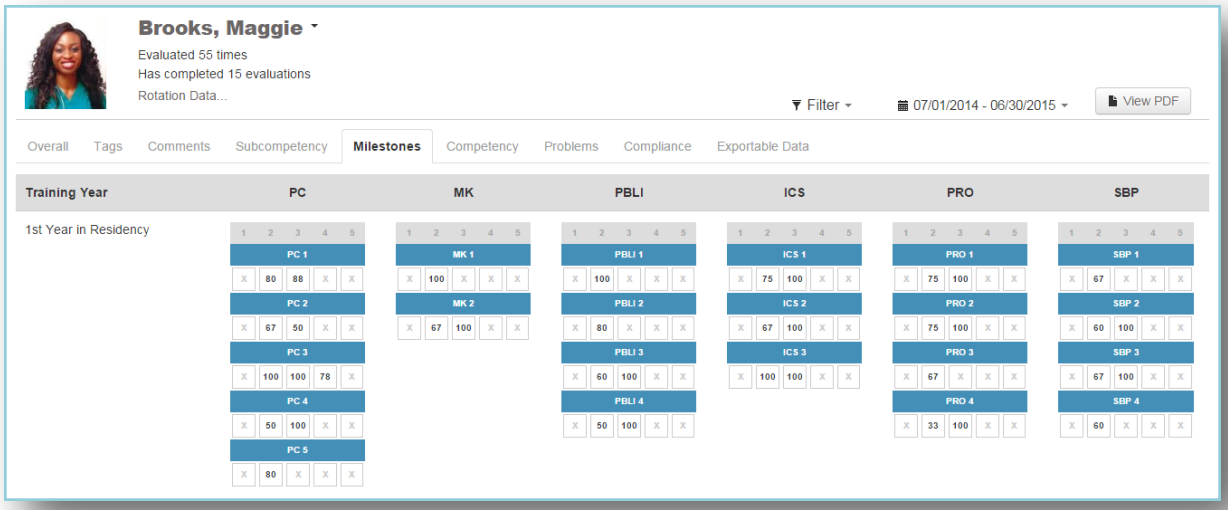
The Milestones Report displays the results of milestone questions. These may be from daily Shift Cards or from any milestone narratives placed directly on evaluation forms.

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 divided by the total number of scores for that milestone).
    - 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 Report displays data collected about the resident from General questions (in your own words) that have been tagged to Core Competencies. Only 'Rating' grade scales are displayed. No subcompetencies or milestones are included.

The results are:

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

Generate the Competency Report:

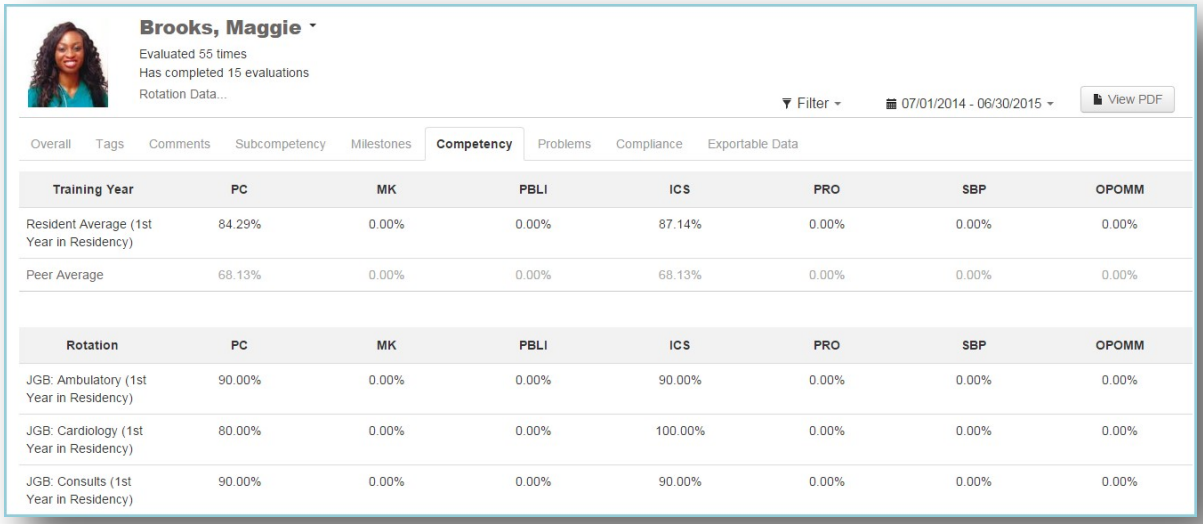
1. Go to *Evaluations > Reports*
2. Select a resident
3. Click the **Competency** tab

This report displays the following columns:

- Training Year - The resident's scores are shown, grouped by 'Year in Residency.' Also shows the Peer Average
- Core Competencies - The resident's level of competency is shown as a percentage for each Core Competency (Patient Care, Medical Knowledge, etc.) (Note: OPOMM stands for Osteopathic Principles and Practices and Manipulative Medicine.)
    - Calculations - All results are converted to percentages and then averaged.

- Example - On two Patient Care questions, a resident received a 3 on a scale of 1 - 5 and a 7 on a scale of 1 - 9. The 3 is converted to 60% and the 7 is converted to 77.78%. These are then averaged ((60 + 77.78)/2) for a score of 68.89% in Patient Care.

- Rotation - Each of the resident's rotations are displayed below for the time period indicated, along with the average score they received for each core competency during that rotation.



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

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

PROBLEMS REPORT

The Problems Report has two sections:

Questions receiving low scores:

- Resident receives a low score on a specific question on an evaluation form flagged to give 'Low Score' notifications
- Resident receives a low score on a specific grade scale, on any evaluation form, 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%

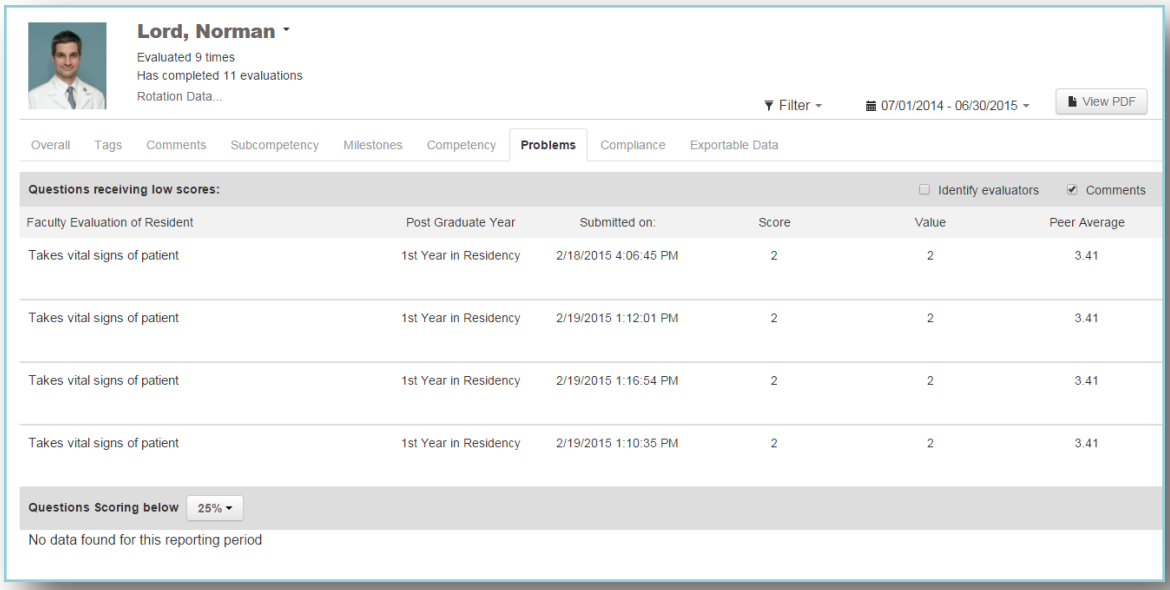
Generate the Problems Report:

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

This report displays the following columns:

- Evaluation Form – Displays the name of the evaluation form and the 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 text of the selection chosen by the evaluator (Ex: Poor, Below Average)
- Value – Shows the value given to that score (Ex: 1, 2)
- Peer Average – Displays the peer average for that question



COMPLIANCE REPORT

This report displays information about 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 and
- The Due Date is in the past

Generate the Compliance Report:

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

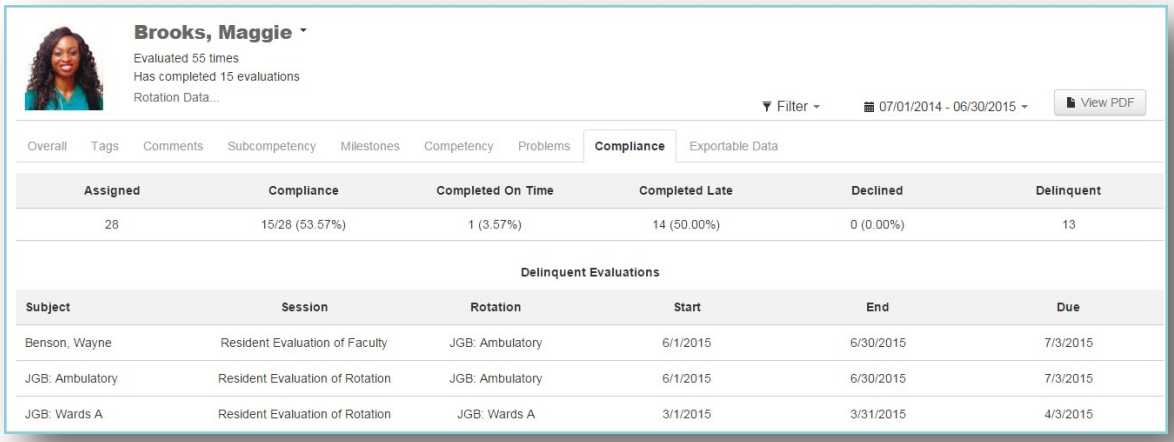
Columns include the following data:

- Assigned - The total number of evaluations assigned to the resident that have a Due Date within the date range of the report
- Compliance - The number of declined and completed evaluations divided by the number of assigned evaluations; The percentage of declined and completed evaluations is shown in parenthesis

    - Calculations - The number of evaluations that were declined and 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 midnight of 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%).
- Declined - The number and percentage of evaluations returned (declined) by the evaluator
    - Calculations - The number of evaluations that were declined divided by the total number of assigned evaluations
    - Example - A resident has 30 evaluations assigned to her with Due Dates in the past. She declined 5 of them. Five divided by 30 equals 16.67%. Her 'Declined' 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 that are currently delinquent (past 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 when the evaluation was supposed to be completed



EXPORTABLE DATA

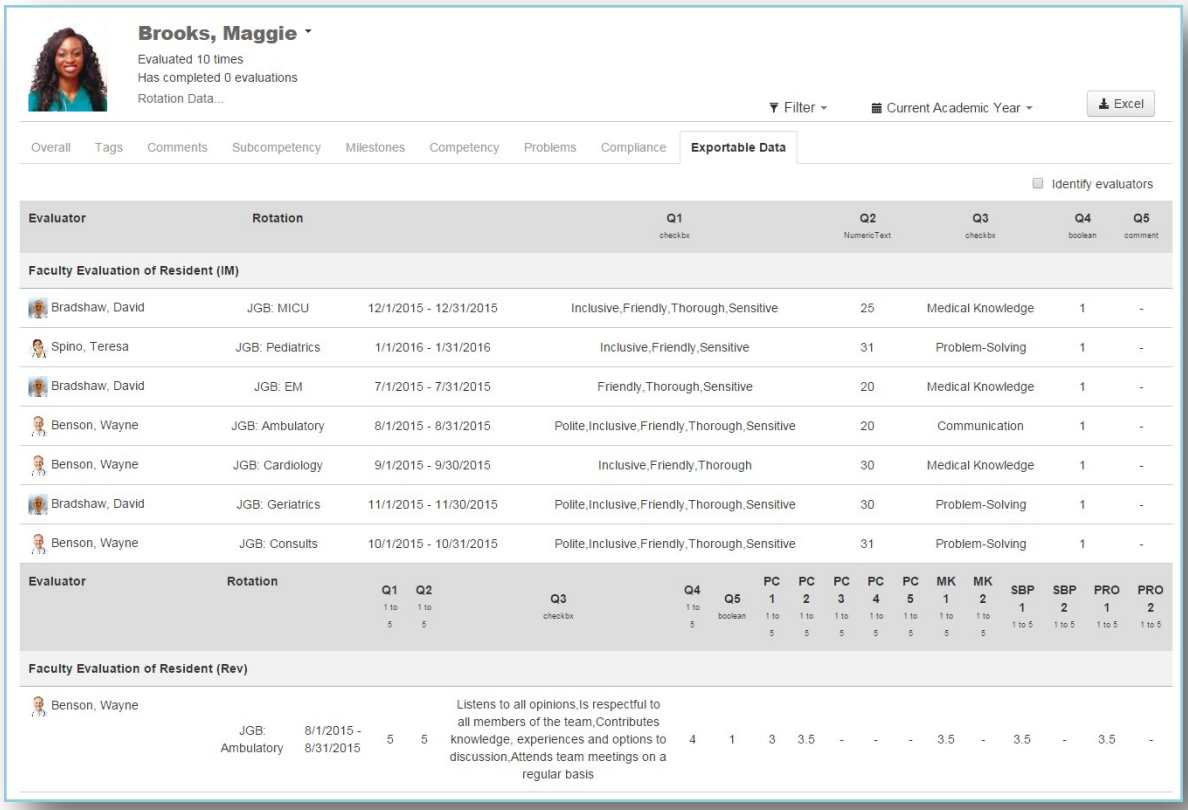
This screen displays the actual scores given to each resident by each evaluator. If the resident was evaluated 12 times, the scores from all twelve evaluations will be displayed. No calculations are performed on this page. The results on this tab cannot be printed using the 'View PDF' button. However, the results can be exported to a spreadsheet format by clicking the **Excel** button, and then printing the document.

Generate the Exportable Data Report:

1. Go to *Evaluations > Reports*
2. Select a Resident
3. Click the **Exportable Data** tab
4. Click **Excel** to export the data to a spreadsheet format that can be printed

This report displays the following information for each evaluation form:

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



Brooks, Maggie

Evaluated 10 times
Has completed 0 evaluations
Rotation Data...

Filter | Current Academic Year | Excel

Overall | Tags | Comments | Subcompetency | Milestones | Competency | Problems | Compliance | **Exportable Data**

Identify evaluators

Evaluator	Rotation		Q1 checkbx	Q2 NumericText	Q3 checkbx	Q4 boolean	Q5 comment
Faculty Evaluation of Resident (IM)							
Bradshaw, David	JGB: MICU	12/1/2015 - 12/31/2015	Inclusive,Friendly,Thorough,Sensitive	25	Medical Knowledge	1	-
Spino, Teresa	JGB: Pediatrics	1/1/2016 - 1/31/2016	Inclusive,Friendly,Sensitive	31	Problem-Solving	1	-
Bradshaw, David	JGB: EM	7/1/2015 - 7/31/2015	Friendly,Thorough,Sensitive	20	Medical Knowledge	1	-
Benson, Wayne	JGB: Ambulatory	8/1/2015 - 8/31/2015	Polite,Inclusive,Friendly,Thorough,Sensitive	20	Communication	1	-
Benson, Wayne	JGB: Cardiology	9/1/2015 - 9/30/2015	Inclusive,Friendly,Thorough	30	Medical Knowledge	1	-
Bradshaw, David	JGB: Geriatrics	11/1/2015 - 11/30/2015	Polite,Inclusive,Friendly,Thorough,Sensitive	30	Problem-Solving	1	-
Benson, Wayne	JGB: Consults	10/1/2015 - 10/31/2015	Polite,Inclusive,Friendly,Thorough,Sensitive	31	Problem-Solving	1	-

Evaluator	Rotation		Q1 1 to 5	Q2 1 to 5	Q3 checkbx	Q4 1 to 5	Q5 boolean	PC 1 1 to 5	PC 2 1 to 5	PC 3 1 to 5	PC 4 1 to 5	PC 5 1 to 5	MK 1 1 to 5	MK 2 1 to 5	SBP 1 1 to 5	SBP 2 1 to 5	PRO 1 1 to 5	PRO 2 1 to 5
Faculty Evaluation of Resident (Rev)																		
Benson, Wayne	JGB: Ambulatory	8/1/2015 - 8/31/2015	5	5	Listens to all opinions,Is respectful to all members of the team,Contributes knowledge, experiences and options to discussion,Attends team meetings on a regular basis	4	1	3	3.5	-	-	-	3.5	-	3.5	-	3.5	-

ROTATING RESIDENTS

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

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

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

There are two program-level reports under the Rotating Residents tab: Performance and Competency.

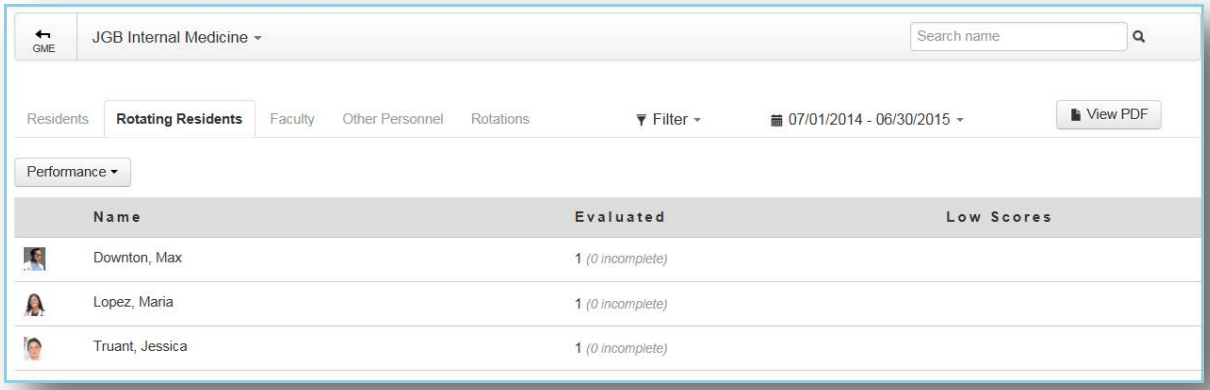
PERFORMANCE REPORT

The program-level Performance Report provides an overview of the performance data collected about 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:

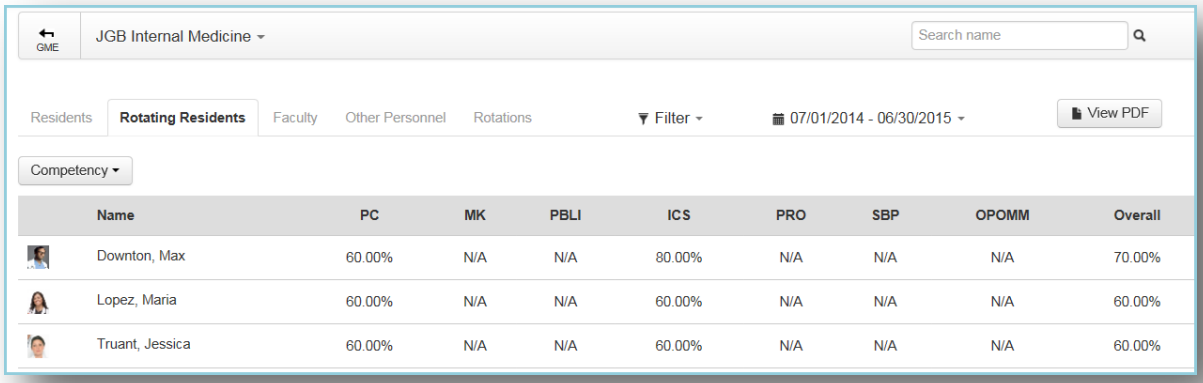
- Name – Residents' names and pictures
- Evaluated:
    - Number of times each resident has been evaluated
    - Number of evaluations distributed but not yet completed (shown in parenthesis)
- Low Scores - Number of low scores received, as configured by Low Score notifications on grade scales or questions



COMPETENCY REPORT

This program-level report displays the overall averages of rotating residents on the Core Competencies (Patient Care, Medical Knowledge, etc.). Results are from General questions only with a Rating grade scale and the questions are tagged to a Core Competency.

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



INDIVIDUAL

There are six reports that provide detailed evaluation information collected about a specific rotating resident. Click on a resident's name to view their reports.

The resident's name and photo will appear at the top left of the report, along with:

- Total number of times this resident has been evaluated during the time span of the report
- Total number of evaluations the resident has completed during the time span of the report
- Hover over **Rotation Data** to view the rotations that appear on completed evaluations

By default, results are displayed for the current academic year. The End Date of the evaluation must fall within the report's date range to be included.

OVERALL REPORT

The Overall Report shows the results from every question on every evaluation form that was used to evaluate the rotating resident/fellow. The default time period is the current academic year. Comments are displayed by default.

Generate the Overall Report:

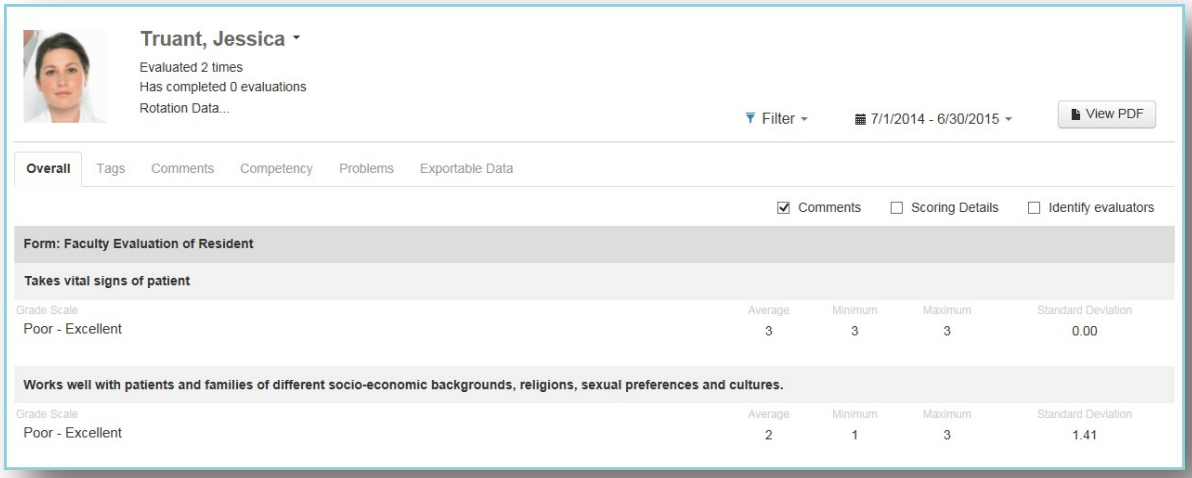
1. Go to *Evaluations > Reports*
2. Click the **Rotating Residents** tab
3. Select a Resident
4. By default, you'll be on the **Overall** tab
5. Check the box for **Scoring Details** to view a graphic display of the results.

The first column on the Overall Report:

- Displays the Name of the evaluation form
- Shows the question text
- Indicates the grade scale used

- Displays evaluator comments

The evaluation results are then displayed to the right of this information. See the details shown in the Resident reports section of this document for the details about each type of grade scale results.



TAGS REPORT

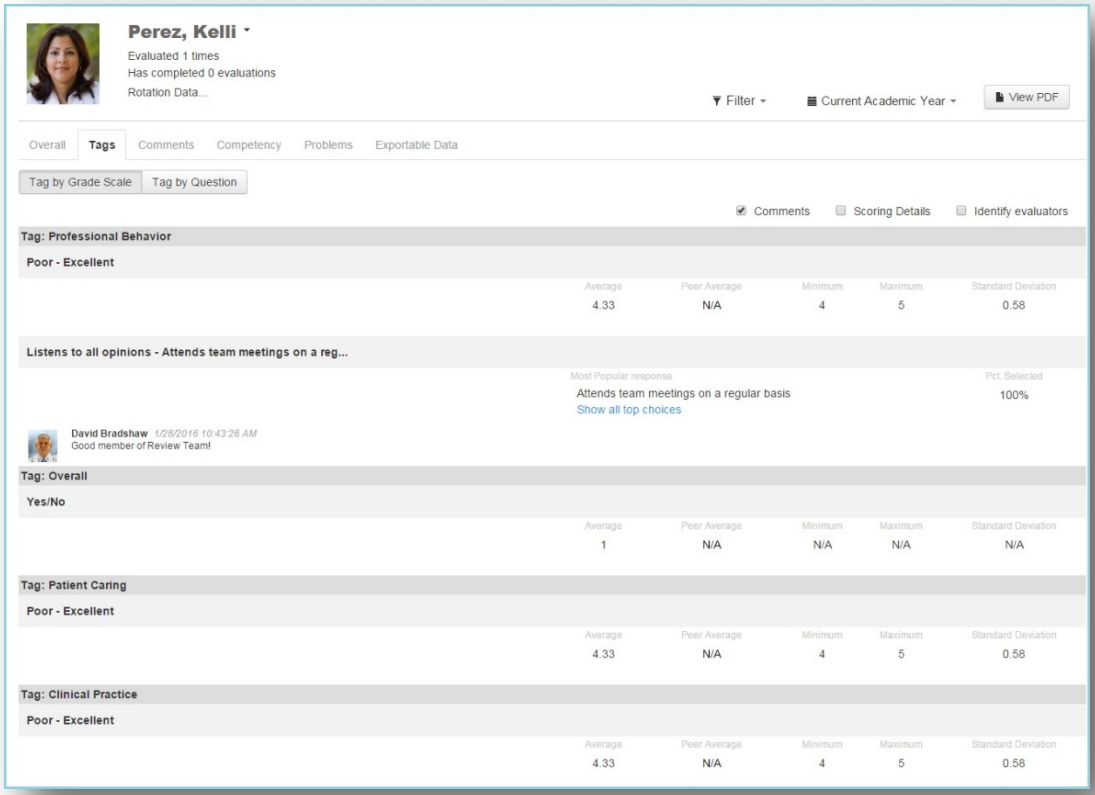
The Tags Report displays the results from Custom Tags placed on General questions (standard questions in your own words). The data can be grouped under two formats:

- Tag by Grade Scale
- Tag by Question

Generate the Tags Reports:

1. Go to *Evaluations > Reports*
2. Click the **Rotating Residents** tab
3. Select a resident
4. Click the **Tags** tab
5. Select one: **Tag by Grade Scale** or **Tag by Question**
6. Check the box for 'Scoring Details' to view a graphical representation of the results

Below is an example of the 'Tag by Grade Scale' report:



COMMENTS REPORT

There are four reports that can be generated to show the evaluators' comments about your rotating residents. These reports allow the comments to be grouped according to Evaluator, Rotation, Tag or Evaluation Form.

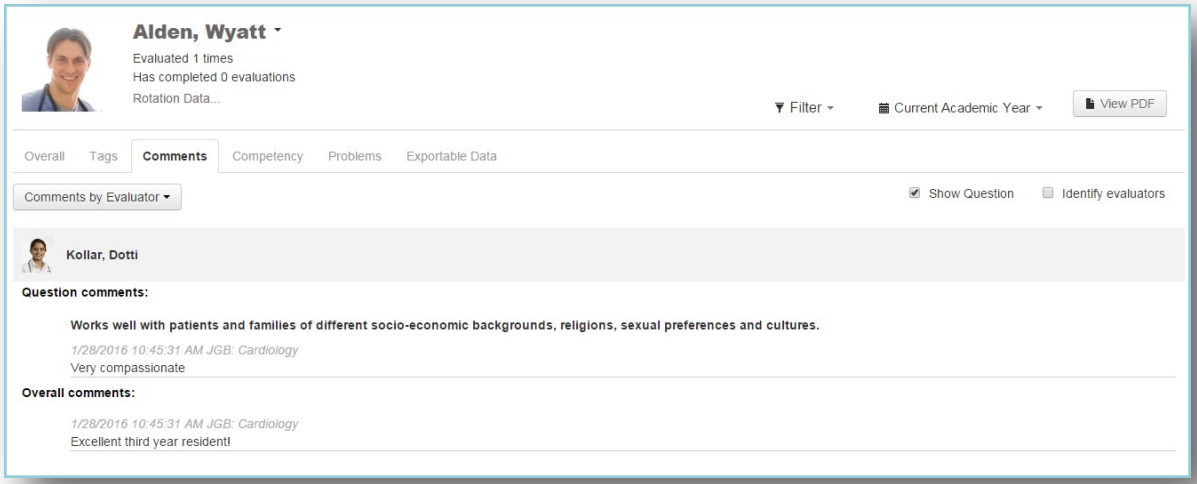
The comments are then grouped showing first the comments submitted on specific questions, followed by the Overall comments. Evaluations marked as 'Anonymous' will display the comments, but not the Evaluator's name or picture.

Generate the Comments Report:

1. Go to *Evaluations > Reports*
2. Click the **Rotating Residents** tab
3. Select a resident
4. Click the **Comments** tab
5. From the dropdown list, select one of the four reports:
    - Comments by Evaluator
    - Comments by Rotation

- Comments by Tag
- Comments by Form

The screenshot below shows the 'Comments by Evaluator' report:



COMPETENCY REPORT

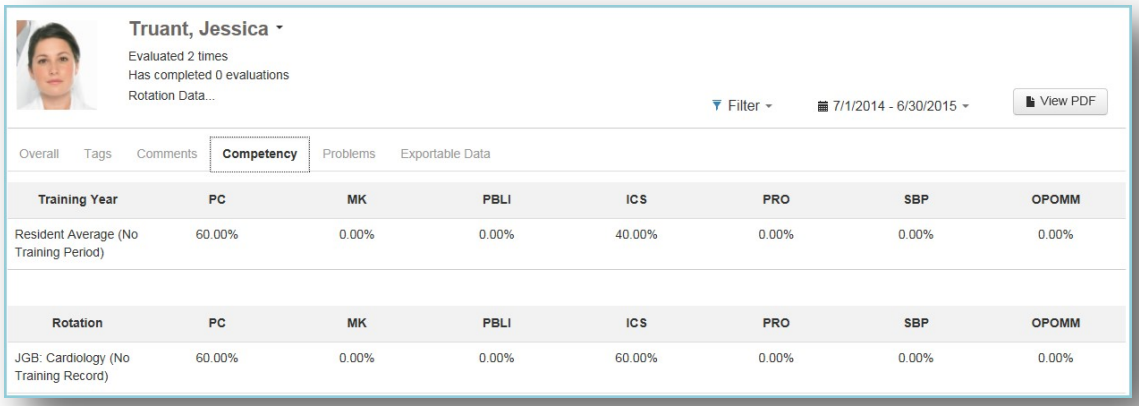
The Competency Report displays data collected about the resident from General questions (in your own words) that have been tagged to Core Competencies. Only 'Rating' grade scales are displayed. No subcompetencies or milestones are included.

The results are:

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

Generate the Competency Report:

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



PROBLEMS REPORT

The Problems Report has two sections:

Questions receiving low scores:

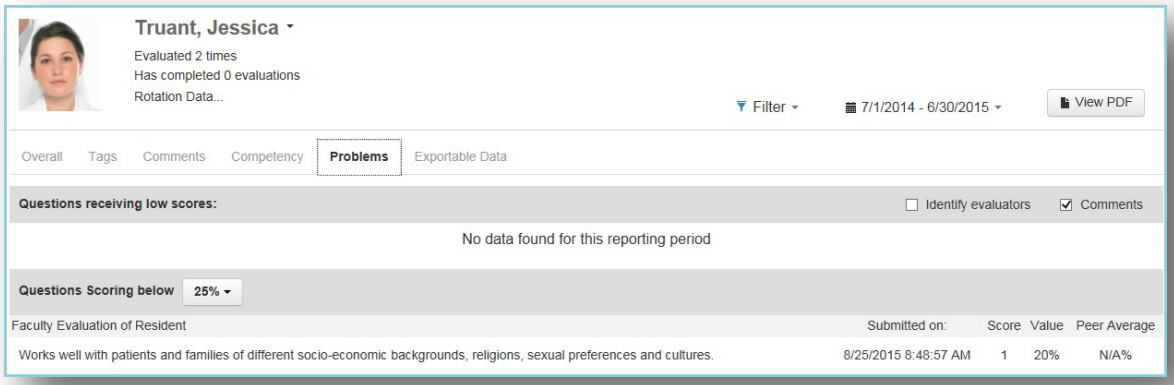
- Resident receives a low score on a specific question on an evaluation form flagged to give Low Score notifications
- Resident receives a low score on a specific grade scale, on any evaluation form, flagged to give Low Score notifications.

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



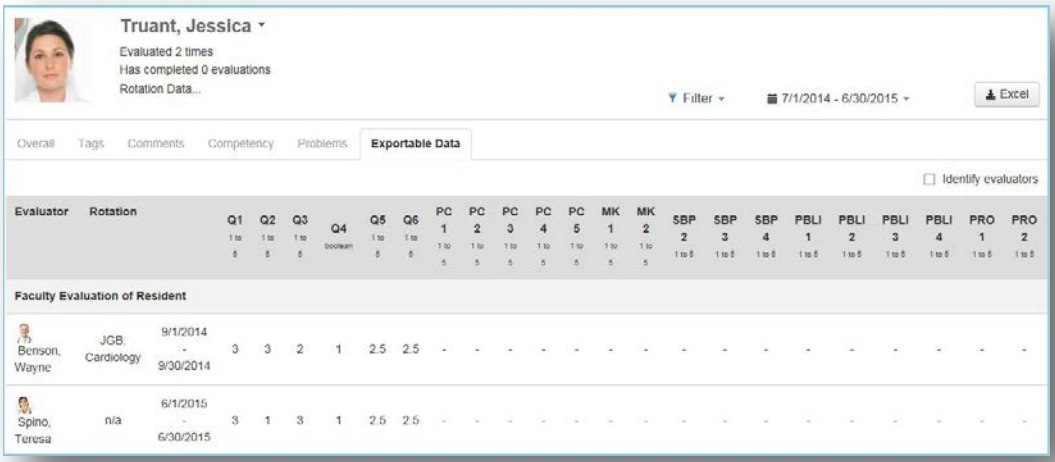
EXPORTABLE DATA

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

Note: Your program's subcompetencies would not have been dynamically added to the evaluation form based on the rotation if the rotating resident is from a different subspecialty. Your milestones do not apply to a rotating resident.

Generate the Exportable Data Report:

1. Go to *Evaluations > Reports*
2. Click the **Rotating Residents** tab
3. Click a resident's name
4. Click the **Exportable Data** tab
5. Click **Excel** to export the data to a spreadsheet format



FACULTY

Click the **Faculty** tab. There are two program level reports available to view results for evaluations of faculty: Performance and Compliance.

To appear in this list, faculty members must have the Work Role of Faculty, plus one of these criteria:

- The Faculty's Personnel record is in the Program's Department/Division
- The Faculty is the subject of a match in a session that is in the Program's Department/Division and is for the report's date range
- The Faculty is the evaluator for a completed match in a session that is in the Program's Department/Division and is for the report's date range

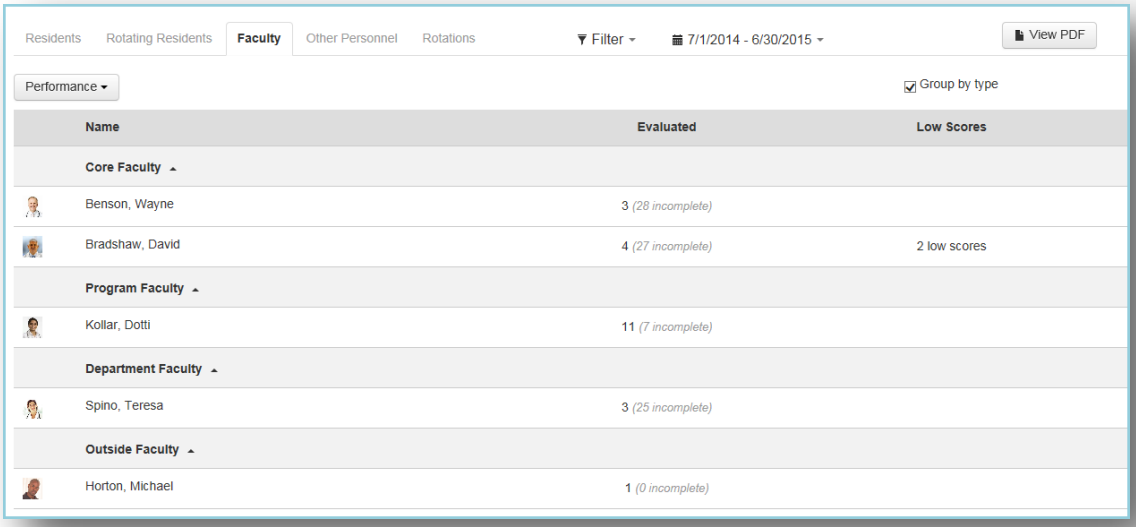
PERFORMANCE REPORT

This screen displays all of your faculty members, plus any outside faculty who have been the subject of an evaluation distributed by your department. Personnel must have the Work Role of Faculty to appear on this page.

- Grouped by:
    - Core Faculty
        - Personnel record resides within your Department/Division
        - Designated as Core Faculty in Administration (*Administration > Program > Personnel*)
    - Program Faculty
        - Personnel record resides within your Department/Division
        - Designated as faculty member, but not designated as Core Faculty in Administration
    - Department Faculty
        - Personnel record resides within your Department/Division
        - Not designated as faculty member in Administration
    - Outside Faculty
        - Personnel record resides in another Department/Division
- Name - Picture and Faculty name is displayed
- Evaluated
    - Number of times they have been evaluated
    - Number of evaluations distributed where they are the subject that have not been completed (in parenthesis)
- Low Scores - Number of low scores received, as configured on your questions or grade scales

Generate the Performance Report:

1. Go to *Evaluations > Reports*
2. Click the **Faculty** tab
3. The page defaults to the **Performance** Report



COMPLIANCE REPORT

The Compliance Report displays information for evaluations that were assigned to a person with the Work Role of Faculty 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 and
- The Due Date is in the past

This report shows the following data:

- Name - The names and pictures of the faculty members are shown
- Assigned - The number of evaluations assigned to the faculty for the time period of the report
- Compliance - The number of declined and completed evaluations divided by the number of evaluations assigned; The percentage of evaluations that have been declined and completed is shown in parenthesis
- 14 Day Compliance - The number of completed evaluations within 14 days of the end of the rotation divided by the number of assigned evaluations; in parenthesis, the percentage of evaluations that have been completed by the faculty member within 14 days of the end of the rotation is displayed. Details:
    - The rotation in the match must match the rotation on the block schedule for the same dates
    - The End Date of the rotation on the block schedule must fall in the same interval as the match in the session
    - Declined evaluations are not included
    - Matches made by the evaluator (On-Demand evaluations) are not included (These matches appear with a yellow background on the Session Manager and on the Match List.)
- Completed On Time - The number and percentage of evaluations that were declined and completed before the Due Date
- Completed Late - The number and percentage of declined and completed evaluations that were completed after the Due Date
- Declined - The number and percentage of evaluations that were returned (declined) by the faculty member

- Delinquent - The number of evaluations assigned to the faculty member for the date range of the report that are currently past their Due Date

Generate the Compliance Report:

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

Evaluation Reporting

Feedback?

GME | JGB Internal Medicine | Search name

Residents | Rotating Residents | **Faculty** | Other Personnel | Rotations | Filter | 7/1/2014 - 6/30/2015 | View PDF

Compliance | Group by type

Name	Assigned	Compliance	14 Day Compliance	Completed on Time	Completed Late	Declined	Delinquent
Core Faculty							
Benson, Wayne	52	18/52 (34.62%)	2/49 (4.08%)	1 (1.92%)	17 (32.69%)	0 (0.00%)	34
Bradshaw, David	48	17/48 (35.42%)	2/45 (4.44%)	0 (0.00%)	17 (35.42%)	0 (0.00%)	31
Core Faculty Total	**100**	**35/100 (36.00%)**	**4/94 (4.26%)**	**1 (1.00%)**	**34 (34.00%)**	**0 (0.00%)**	**65**
Program Faculty							
Kollar, Dotti	51	27/51 (52.94%)	1/35 (2.86%)	4 (7.84%)	23 (45.10%)	0 (0.00%)	24
Program Faculty Total	**51**	**27/51 (60.78%)**	**1/35 (2.86%)**	**4 (7.84%)**	**23 (45.10%)**	**0 (0.00%)**	**24**
Department Faculty							
Spino, Teresa	51	19/51 (37.25%)	5/43 (11.63%)	2 (3.92%)	17 (33.33%)	0 (0.00%)	32
Department Faculty Total	**51**	**19/51 (37.25%)**	**5/43 (11.63%)**	**2 (3.92%)**	**17 (33.33%)**	**0 (0.00%)**	**32**
Outside Faculty							
Horton, Michael	0	-	N/A	-	-	-	-
Outside Faculty Total	**0**	**-**	**N/A**	**-**	**-**	**-**	**-**
Total:	**202**	**81/202 (40.10%)**	**10/172 (5.81%)**	**7 (3.47%)**	**74 (36.63%)**	**0 (0.00%)**	**121**

For personnel with the Work Role of Faculty, the results are grouped by:

- Core Faculty
  - Personnel record resides within your Department/Division
  - Designated as Core Faculty in Administration (*Administration > Program > Personnel*)
- Program Faculty
  - Personnel record resides within your Department/Division
  - Designated as faculty member, but not designated as Core Faculty in Administration
- Department Faculty
  - Personnel record resides within your Department/Division

- Not designated as faculty member in Administration
- Outside Faculty
  - Personnel record resides in another Department/Division

Click the arrows to collapse the list of individual faculty members and view the totals for each group and an Overall total. Uncheck the box for 'Group by type' to view the faculty members in alphabetical order, rather than by group.

Evaluation Reporting

Feedback?

GME | JGB Internal Medicine | Search name

Residents | Rotating Residents | Faculty | Other Personnel | Rotations | Filter | 7/1/2014 - 6/30/2015 | View PDF

Compliance | Group by type

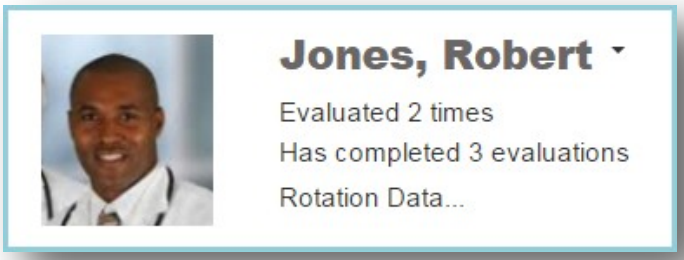
Name	Assigned	Compliance	14 Day Compliance	Completed on Time	Completed Late	Declined	Delinquent
Core Faculty							
Core Faculty Total	100	35/100 (36.00%)	4/94 (4.26%)	1 (1.00%)	34 (34.00%)	0 (0.00%)	65
Program Faculty							
Program Faculty Total	51	27/51 (60.78%)	1/35 (2.86%)	4 (7.84%)	23 (45.10%)	0 (0.00%)	24
Department Faculty							
Department Faculty Total	51	19/51 (37.25%)	5/43 (11.63%)	2 (3.92%)	17 (33.33%)	0 (0.00%)	32
Outside Faculty							
Outside Faculty Total	0	-	N/A	-	-	-	-
Total:	202	81/202 (40.10%)	10/172 (5.81%)	7 (3.47%)	74 (36.63%)	0 (0.00%)	121

INDIVIDUAL

Click on a faculty member's name to view their individual reports. The faculty member's name and photo will appear at the top left of the report, along with the following information:

- Total number of times this faculty has been evaluated for the date range of the report
- Total number of evaluations completed by this faculty during the date range of the report
- Hover over **Rotation Data** to view the list of rotations appearing on completed evaluations for 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.



OVERALL REPORT

The Overall Report displays the results from every question on every evaluation form that was used to evaluate the faculty member. Comments are displayed by default.

Generate the Overall Report:

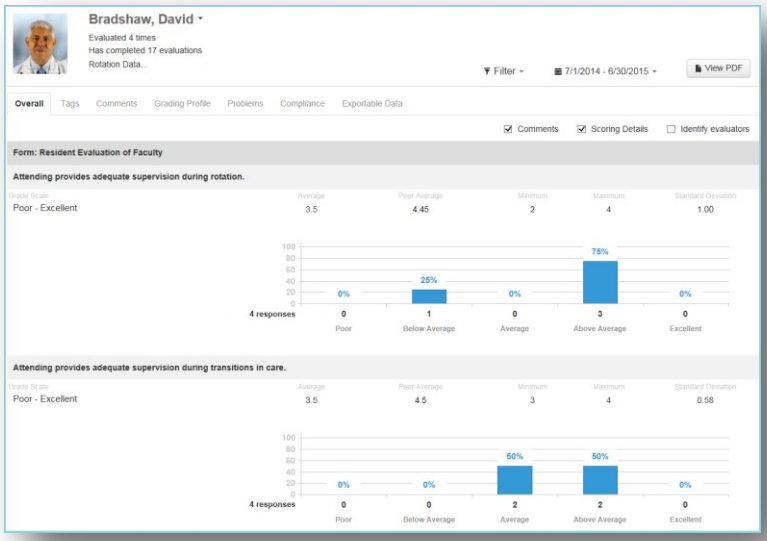
1. Go to *Evaluations > Reports*
2. Click on the **Faculty** tab
3. Select a faculty member
4. The screen defaults to the **Overall** tab
5. Check the box for **Scoring Details** to display a bar graph for each question

The first column includes:

- Evaluation Form: Name of each form
- Text of each question
- Grade scale used
- Comments submitted by evaluators

The remainder of the page will display different information depending on the grade scales used. Please see the explanations and examples of the results of each grade scale in the Residents section of this document.

The Peer Average includes any faculty who was evaluated on that particular question. In other words, the Peer Group includes Department, Program, and Core and Outside faculty members who were evaluated using the same form.



TAGS REPORT

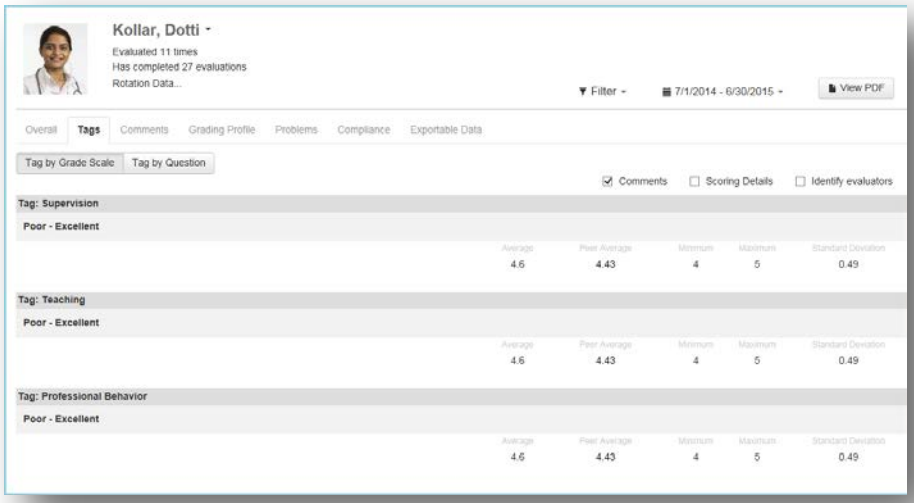
The Tags report displays the results from Custom Tags placed on General questions (in your own words). The data can be grouped under two formats:

- Tag by Grade Scale
- Tag by Question

The two screenshots below display the same evaluation responses but have been grouped in each of the different formats. Check the box for 'Scoring Details' to view a graphical representation of the results.

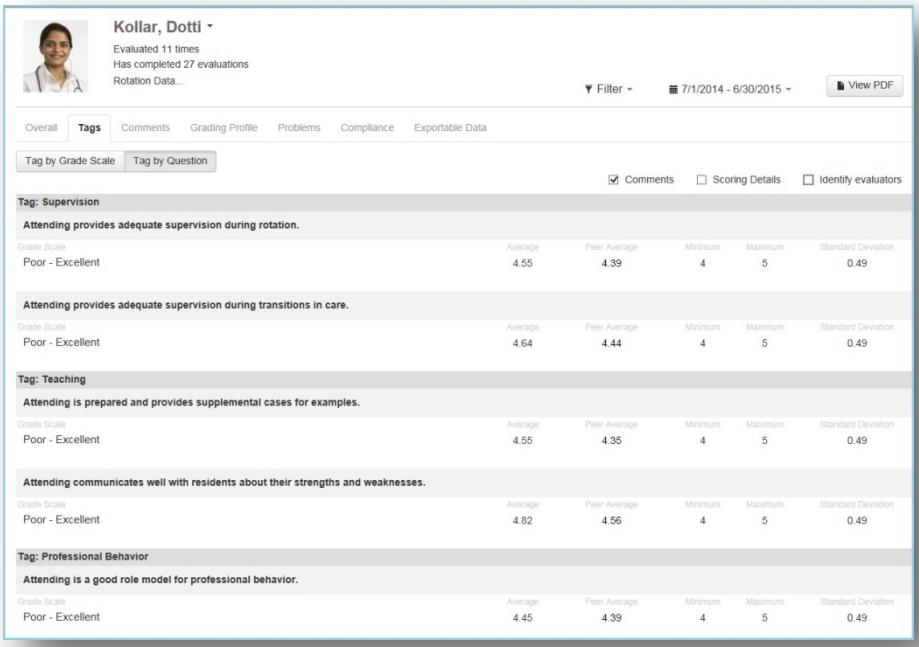
Generate the Tag by Grade Scale Report:

1. Go to *Evaluations > Reports*
2. Click the **Faculty** tab
3. Click on a faculty member
4. Click the **Tags** tab
5. Click **Tag by Grade Scale**
6. Responses are grouped by the one grade scale called 'Poor – Excellent'



Generate the Tag by Question Report:

1. Go to *Evaluations > Reports*
2. Click the **Faculty** tab
3. Click on a faculty member
4. Click the **Tags** tab
5. Click **Tag by Question**



COMMENTS REPORT

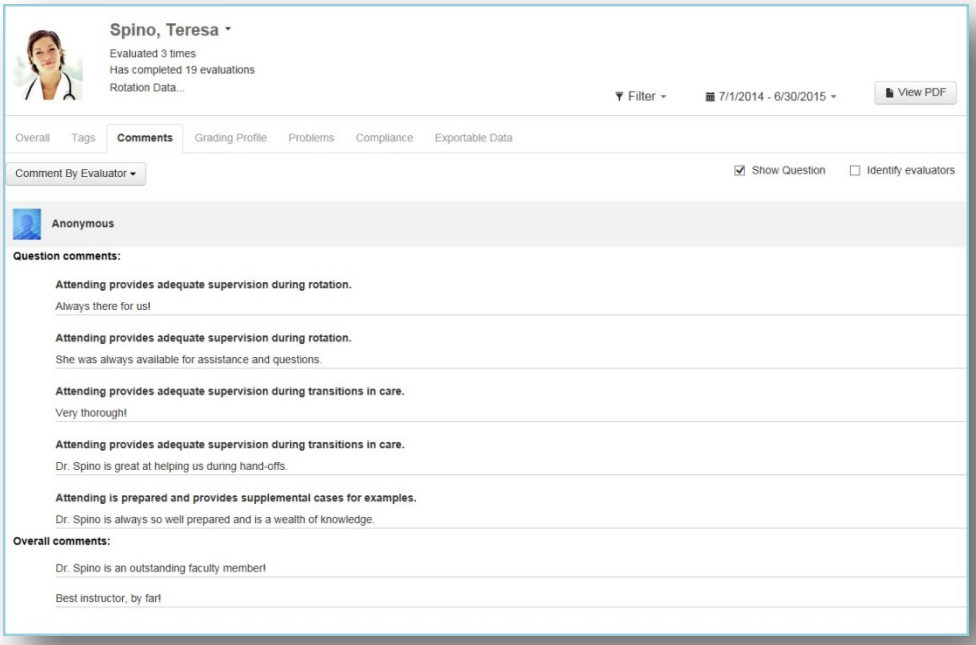
The Comments Report displays all of the comments made by evaluators about the subject. The comments are grouped together under a specific question, followed by the Overall comments. There are four Comments reports to select from:

- Comments by Evaluator – Grouped by evaluator
- Comments by Rotation – Grouped alphabetically by rotation. If evaluator identity is not shown, you lose the ability to group by rotation since it is one of the identifying factors.
- Comments by Tag – Grouped by Custom Tags only
- Comments by Form – Grouped by evaluation form, regardless of tagging or mapping

Generate the Comments Report:

1. Go to *Evaluations > Reports*
2. Click the **Faculty** tab
3. Click on a faculty member
4. Click the **Comments** tab
5. Select one of the four Comments reports from the dropdown list

Below is an example of the 'Comments by Evaluator' screen. Since the session distributing these evaluations was marked to be 'Anonymous to the Subject,' by default no evaluator information is shown. If you would like to display the hidden information, please check the box for 'Identify evaluators.'



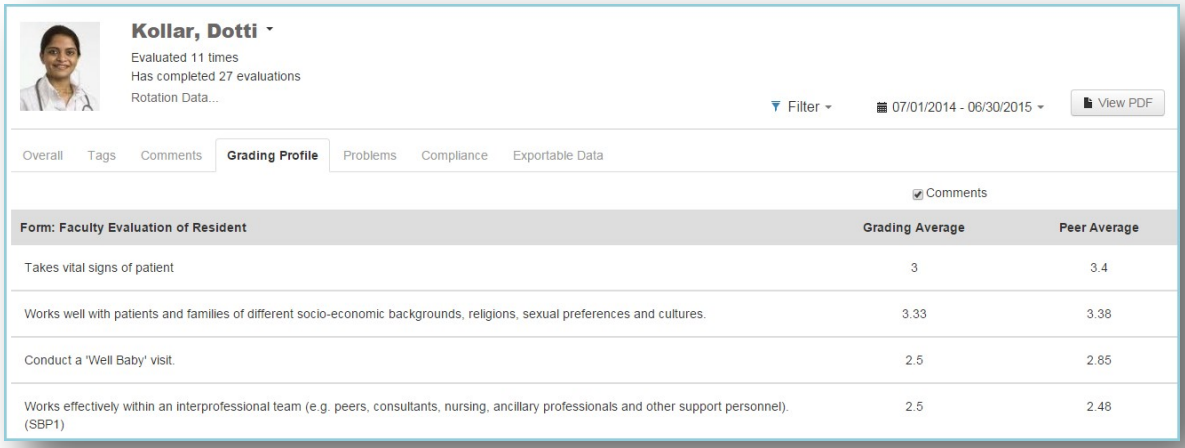
GRADING PROFILE

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

- Question text for each evaluation form
- 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. Click on the **Faculty** tab
3. Select a faculty member
4. Click the **Grading Profile** tab



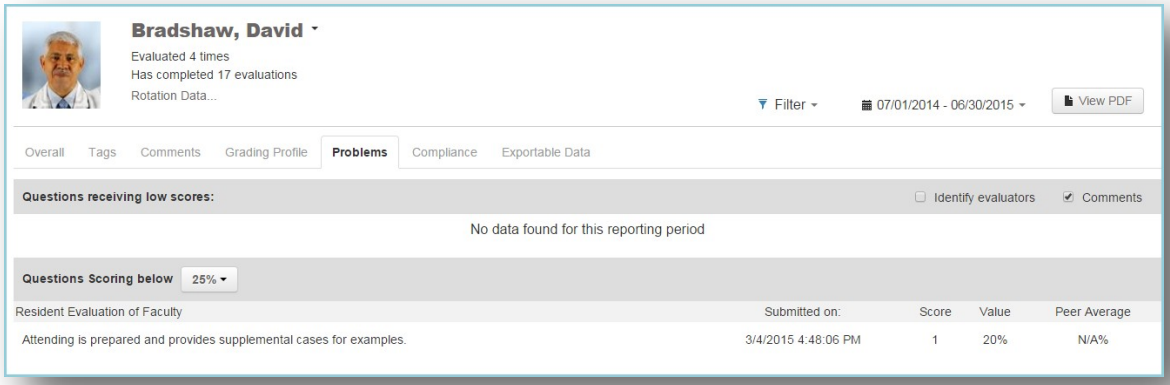
PROBLEMS REPORT

The Problems Report displays the following information:

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

Generate the Problems Report:

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



COMPLIANCE REPORT

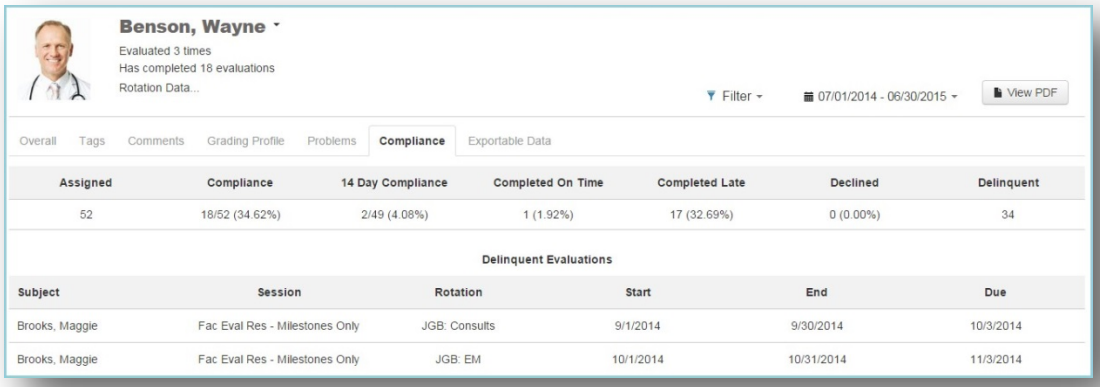
This report displays compliance information for faculty members completing their evaluations.

This report shows the following data:

- Assigned - The number of evaluations assigned to the faculty that has a Due Date within the time period of the report
- Compliance - The number of evaluations that have been declined or completed divided by the number of evaluations assigned; Percentage declined and completed shown in parenthesis
- 14 Day Compliance - The number of evaluations that have been completed by the faculty member within 14 days of the end of the rotation divided by the number of evaluations assigned; Percentage completed shown in parenthesis (See more details below.)
- Completed On Time - The number and percentage of declined and completed evaluations that were completed before midnight of the Due Date
- Completed Late - The number and percentage of declined and completed evaluations that were completed after midnight of the Due Date
- Declined - The number and percentage of evaluations that were returned (declined) by the faculty member
- Delinquent - The number of evaluations assigned to the faculty member that have not been completed and currently past their Due Date
- Delinquent Evaluations - The chart on the bottom half of the screen displays details about the evaluations that are currently delinquent

Generate the Compliance Report:

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



Benson, Wayne

Evaluated 3 times
Has completed 18 evaluations
Rotation Data...

Filter | 07/01/2014 - 06/30/2015 | View PDF

Overall | Tags | Comments | Grading Profile | Problems | **Compliance** | Exportable Data

Assigned	Compliance	14 Day Compliance	Completed On Time	Completed Late	Declined	Delinquent
52	18/52 (34.62%)	2/49 (4.08%)	1 (1.92%)	17 (32.69%)	0 (0.00%)	34

Delinquent Evaluations

Subject	Session	Rotation	Start	End	Due
Brooks, Maggie	Fac Eval Res - Milestones Only	JGB: Consults	9/1/2014	9/30/2014	10/3/2014
Brooks, Maggie	Fac Eval Res - Milestones Only	JGB: EM	10/1/2014	10/31/2014	11/3/2014

Notes about 14-Day Compliance

- The rotation in the match must match the rotation on the block schedule for the same dates
- The End Date of the rotation on the block schedule must fall in the same interval as the match in the session
- Declined evaluations are not included
- Matches made by the evaluator (On-Demand evaluations) are not included (These matches appear with a yellow background on the Session Manager and on the Match List.)

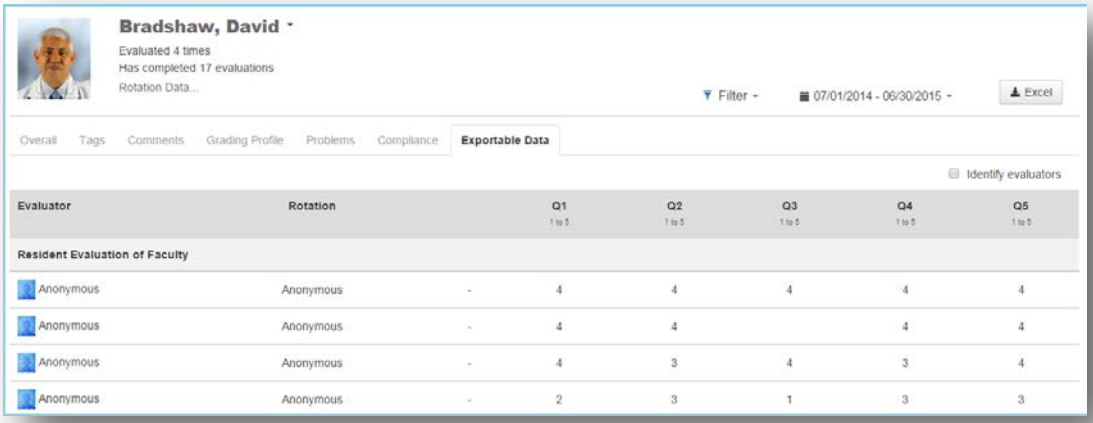
EXPORTABLE DATA

The Exportable Data tab displays the following information:

- Evaluator - Names and pictures of evaluators. The evaluators may show as 'Anonymous' if session was marked as 'Anonymous.' Check the box to 'Identify evaluators' to view the additional information.
- Rotation - If Anonymous, check the box to 'Identify evaluators' to view rotation names
- The individual scores given by evaluators about the faculty on each question

Generate the Exportable Data:

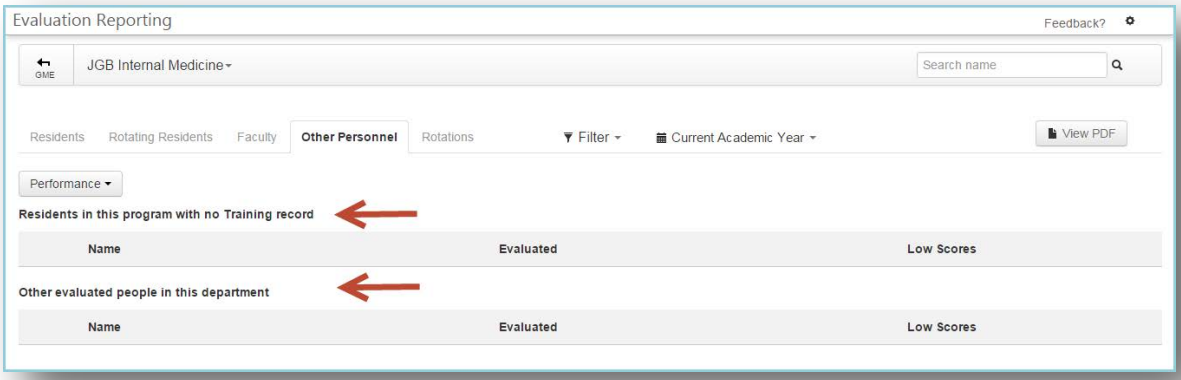
1. Go to *Evaluations > Reports*
2. Click on the **Faculty** tab
3. Select a faculty member
4. Click the **Exportable Data** tab
5. Click the **Excel** button to export the data to a spreadsheet format that can be printed



OTHER PERSONNEL

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 and Competency Reports. These will both be reviewed in detail below:

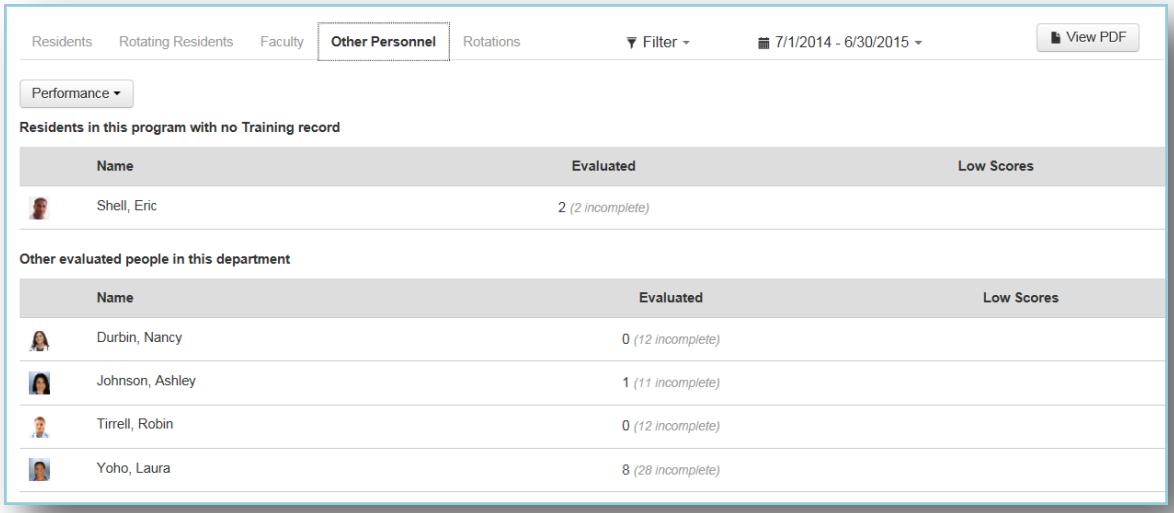
PERFORMANCE REPORT

The Performance Report provides an overview of the performance data collected about 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:

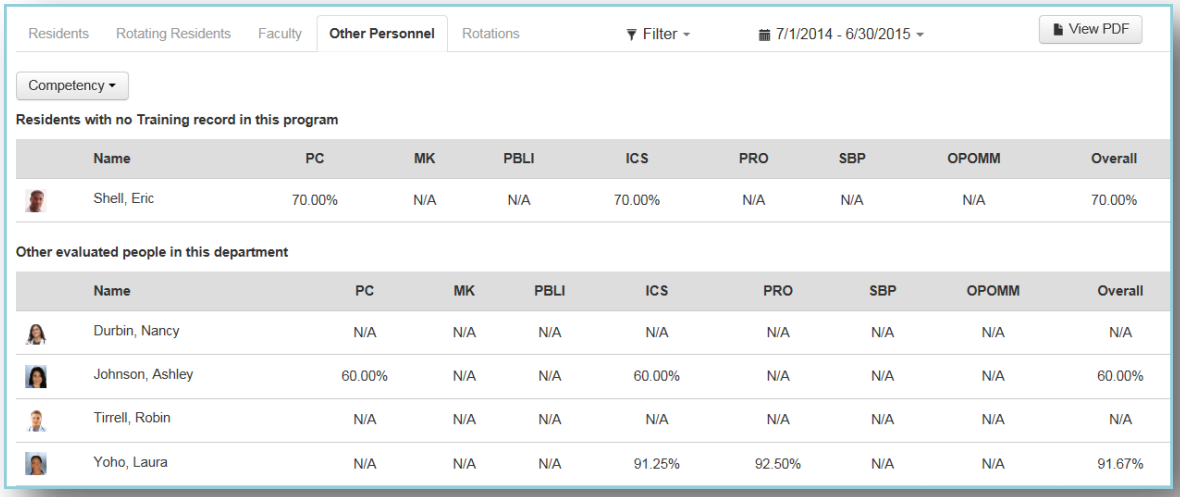
- Name and picture of the person
- Number of times the person has been evaluated
- Number of evaluations distributed about this person, but not yet completed (shown in parenthesis)
- Number of low scores received, as configured by Low Score notifications on grade scales or questions



COMPETENCY REPORT

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 core competencies. Results are from General questions (in your own words) that use a Rating grade scale and have been tagged to a Core Competency.



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

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

INDIVIDUAL

There are four Performance Reports that provide detailed evaluation information collected about a specific person. Click on a person's name to view these reports.

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, the total number of evaluations completed by them and the Rotation Data for the time span of the report. By default, results are displayed for the current academic year.

OVERALL REPORT

The Overall Report shows the results from every question on every evaluation form that was used to evaluate the person. Comments are displayed by default.

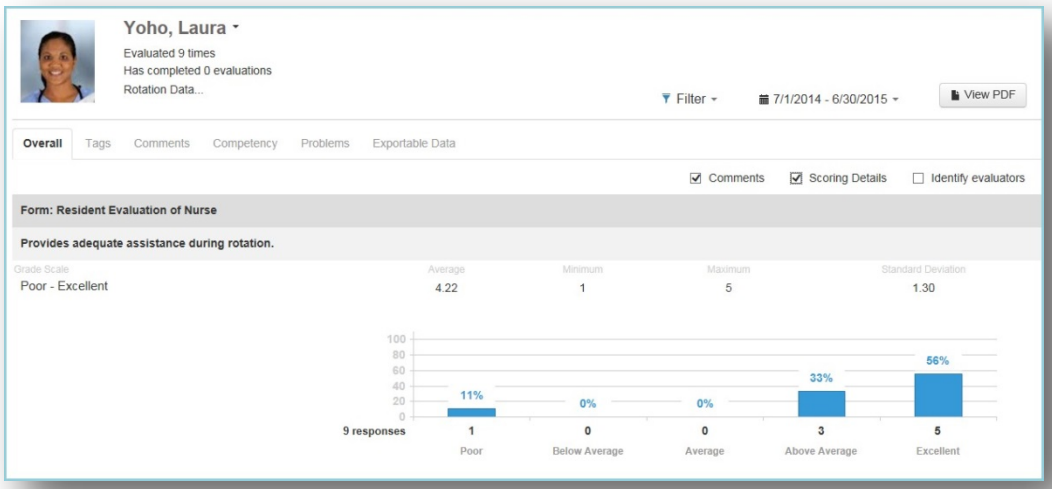
The columns on the Overall Report include:

- Form :
  - Name of the evaluation form
  - Question - Shows the question text
  - Grade scale used
- 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 Overall Report:

1. Go to *Evaluations > Reports*

2. Click the **Other Personnel** tab
3. Select a Person
4. By default, you'll be on the **Overall** 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.



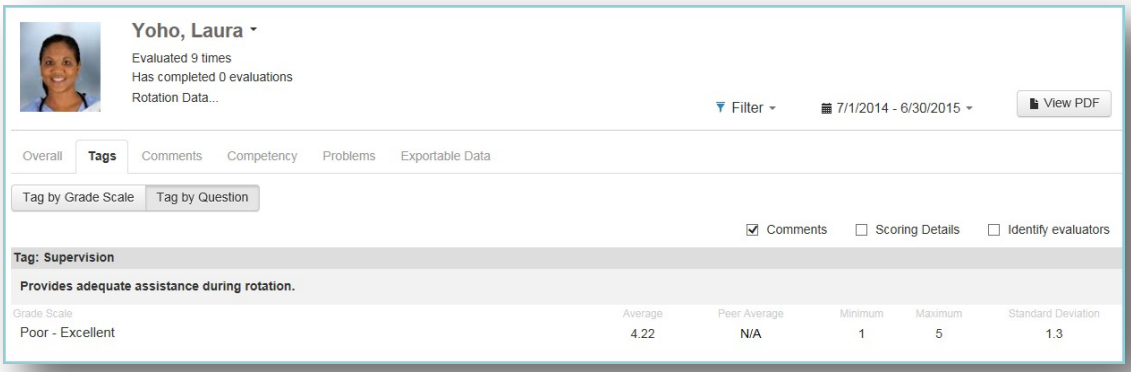
TAGS REPORTS

The Tags Report displays the results from Custom Tags placed on questions. The data can be grouped under two formats: Tag by Grade Scale and Tag by Question

Generate the Tag by Grade Scale Report:

1. Go to *Evaluations > Reports*
2. Click the **Other Personnel** tab
3. Select a person
4. Click the **Tags** tab
5. Select one: **Tag by Grade Scale** or **Tag by Question**
6. Check the box for 'Scoring Details' to view a graphical representation of the results

Below is an example of a 'Tag by Question' report:



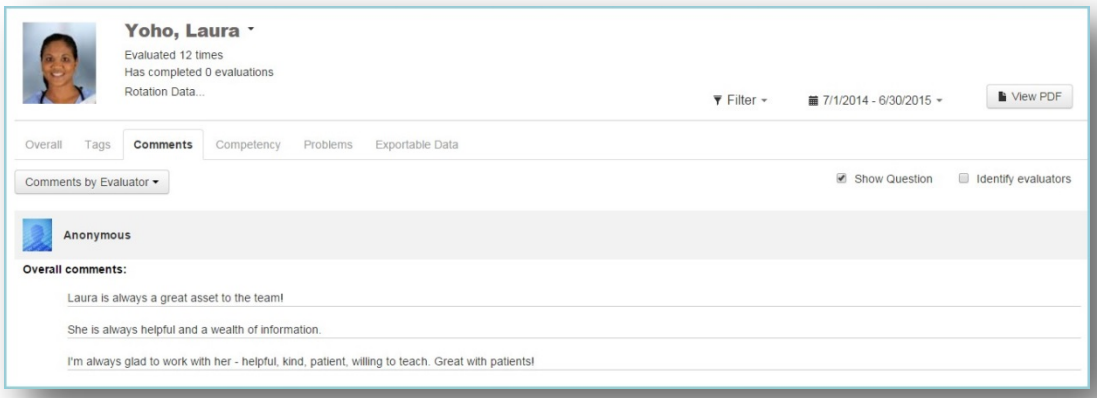
COMMENTS REPORT

There are four reports that can be generated to show evaluators' comments. These reports allow the comments to be grouped according to Evaluator, Rotation, Tag or Evaluation Form.

The comments are grouped under each Evaluator showing first the comments submitted on specific Questions, and then the Overall comments. Evaluations marked as 'Anonymous' will display the comments, but not the Evaluator's name or picture. Check the box for 'Identify evaluators' to view the identifying information.

Generate the Comments Report:

1. Go to *Evaluations > Reports*
2. Select a resident
3. Click the **Comments** tab
4. By default, you'll be on the **Comments by Evaluator** report
5. Select one of the other reports from the dropdown list:
    - Comments by Evaluator
    - Comments by Rotation
    - Comments by Tag
    - Comments by Evaluation Form



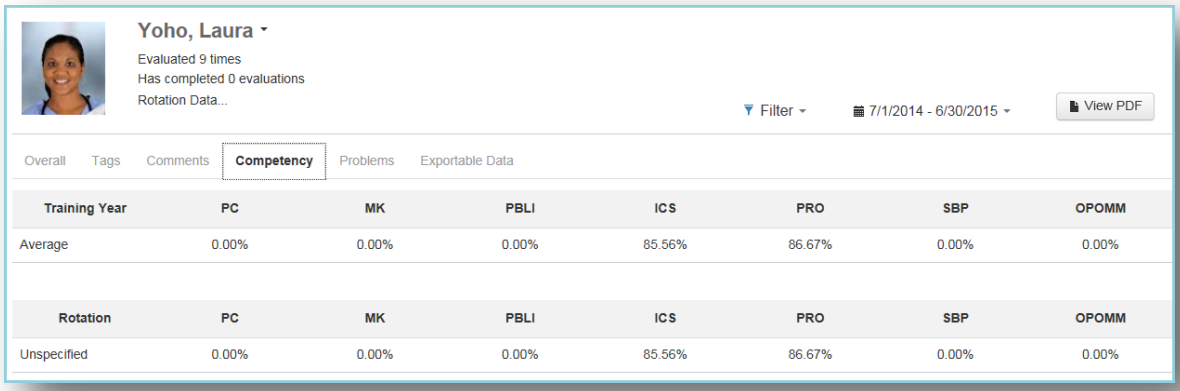
COMPETENCY REPORT

The Competency Report displays data collected about the person from General questions (in your own words) that are tagged with a Core Competency. The results are from Rating grade scales only. They 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



Training Year	PC	MK	PBLI	ICS	PRO	SBP	OPOMM
Average	0.00%	0.00%	0.00%	85.56%	86.67%	0.00%	0.00%

Rotation	PC	MK	PBLI	ICS	PRO	SBP	OPOMM
Unspecified	0.00%	0.00%	0.00%	85.56%	86.67%	0.00%	0.00%

PROBLEMS REPORT

The Problems Report has two sections:

Questions receiving low scores:

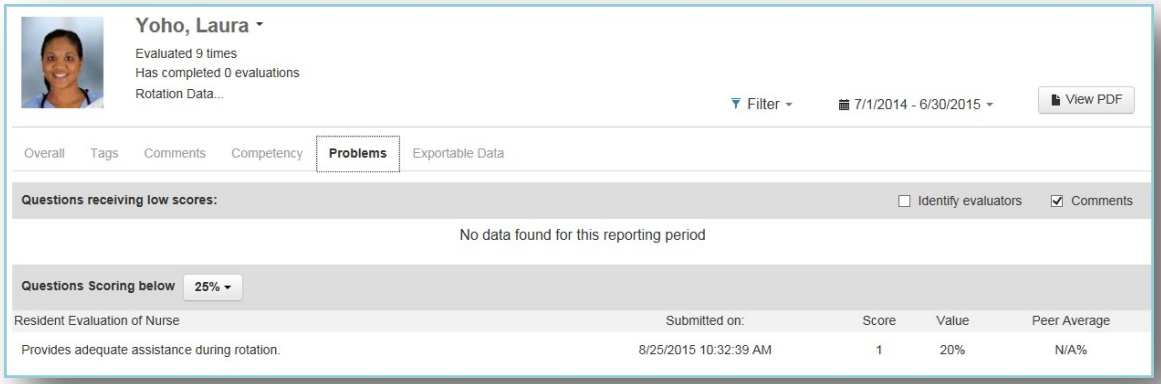
- Person receives a low score on a specific question on an evaluation form flagged to give Low Score notifications
- Person receives a low score on a specific grade scale, on any evaluation form, flagged to give Low Score notifications.

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



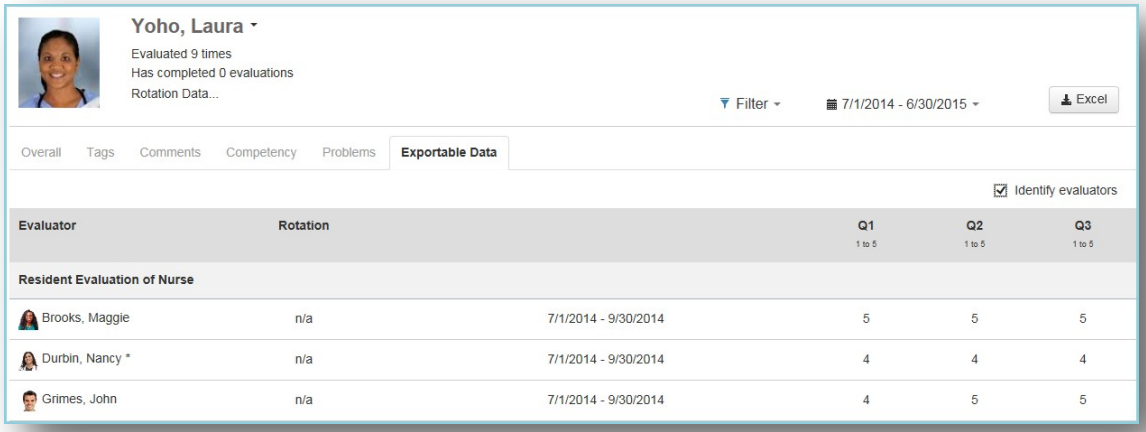
EXPORTABLE DATA

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

the Exportable Data Report:

1. Go to *Evaluations > Reports*
2. Click 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



ROTATION REPORTS

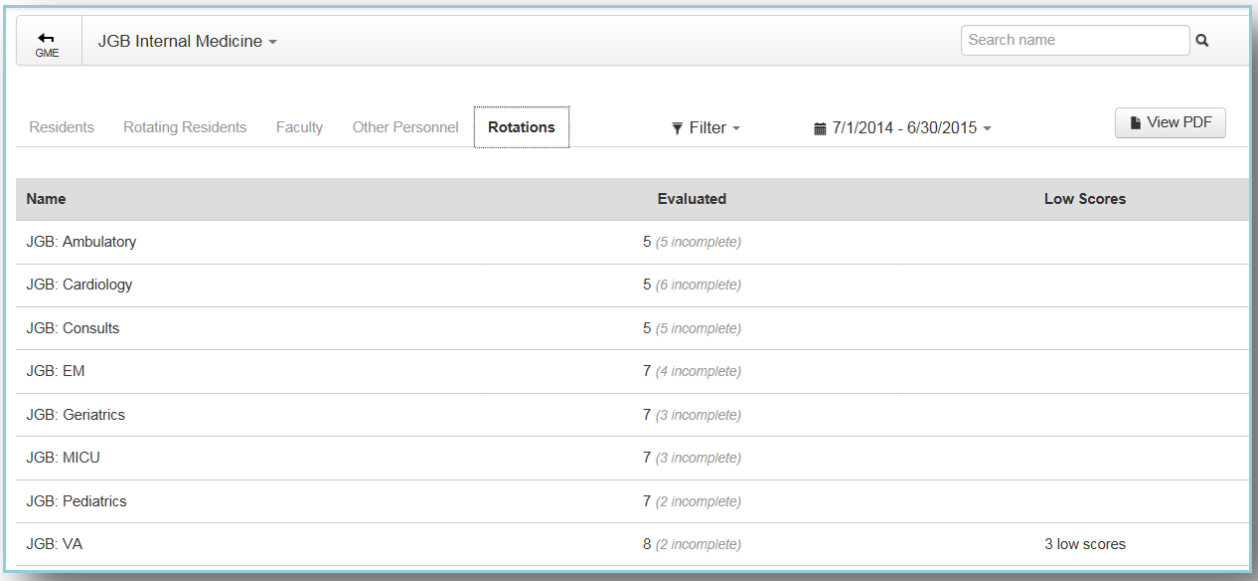
PROGRAM LEVEL

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 names
- Number of times each 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



INDIVIDUAL

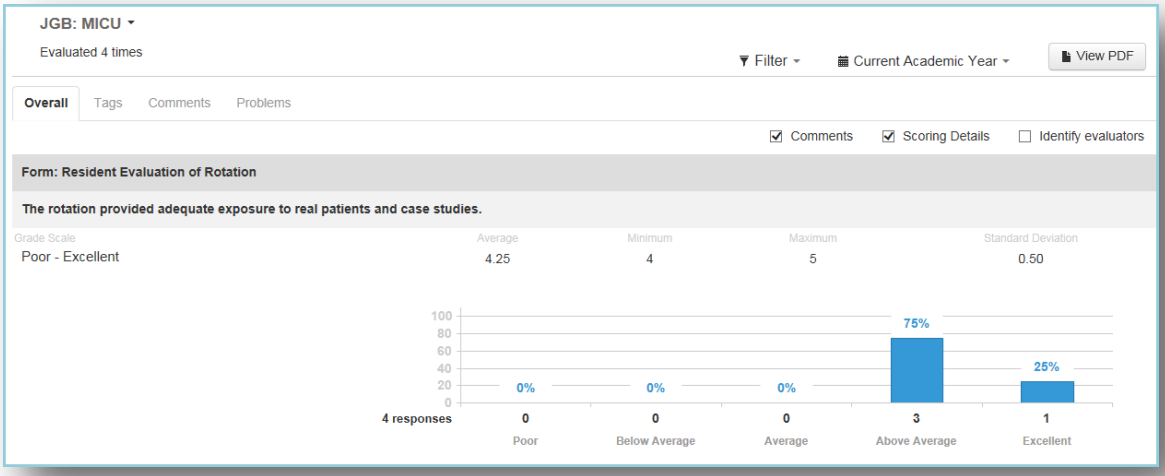
OVERALL TAB

The Overall tab shows the responses given to the questions asked about the rotation experience. It includes the Average score for each 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 MICU rotation was evaluated 4 times
- The first question:
  - Has an average of 4.25
  - Received 3 responses for ‘Above Average’ and 1 response for ‘Excellent’



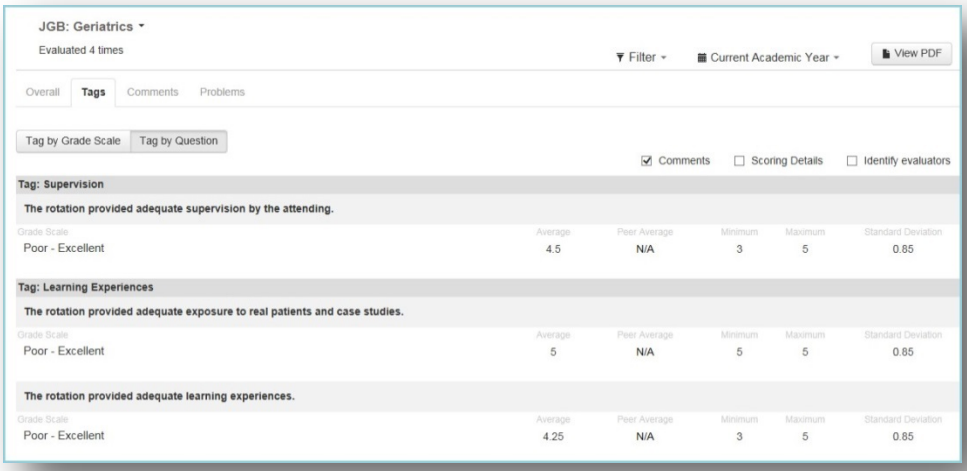
TAGS REPORT

The Tags Report displays the results from Custom Tags placed on General questions (in your own words) that have a Rating grade scale. The data can be grouped under two formats: Tag by Grade Scale and Tag by Question.

Generate the Tags Report:

1. Go to *Evaluations > Reports*
2. Click the **Rotations** tab
3. Select a rotation
4. Click the **Tags** tab
5. Select one: **Tag by Grade Scale** or **Tag by Question**
6. Check the box for 'Scoring Details' to view a graphical representation of the results

Below is a screenshot of the 'Tag by Question' report:



COMMENTS REPORT

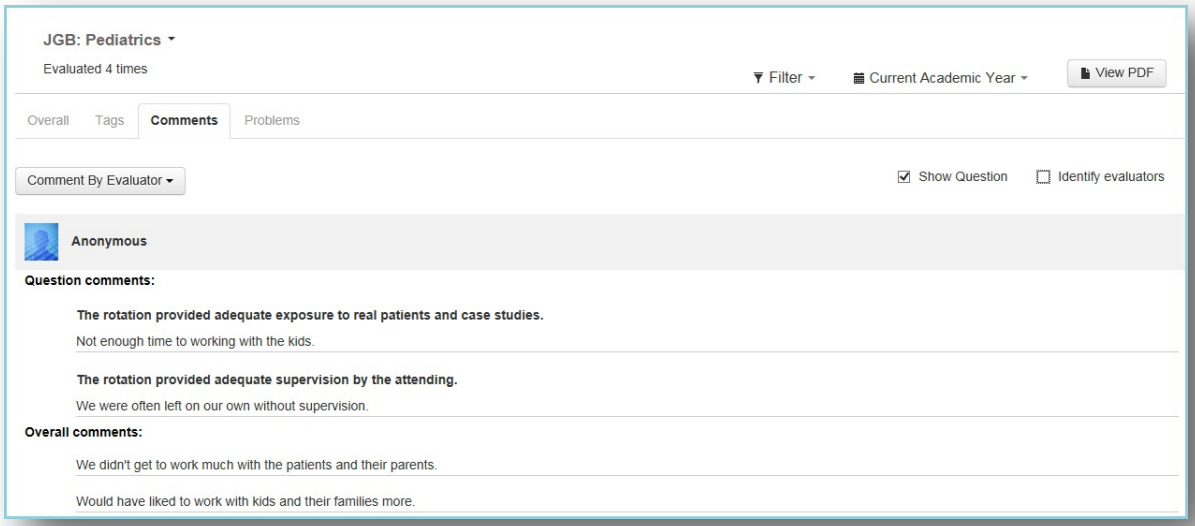
The Comments Report displays all of the comments made by evaluators about the rotation. The comments are grouped together under a specific question, followed by the Overall comments. The Comments reports are:

- Comments by Evaluator – Grouped by evaluator
- Comments by Tag – Grouped by Custom Tags only
- Comments by Form – Grouped by evaluation form, regardless of tagging or mapping

Generate the Comments Report:

1. Go to *Evaluations > Reports*
2. Click the **Rotations** tab
3. Click the **Comments** tab
4. Select one from the dropdown list:
    a. Comments by Evaluator
    b. Comments by Tag
    c. Comments by Form

Below is an example of the 'Comments by Evaluator' screen. Since the session distributing these evaluations was marked to be 'Anonymous to the Subject,' by default no evaluator information is shown. If you would like to display the hidden information, please check the box for 'Identify evaluators.'



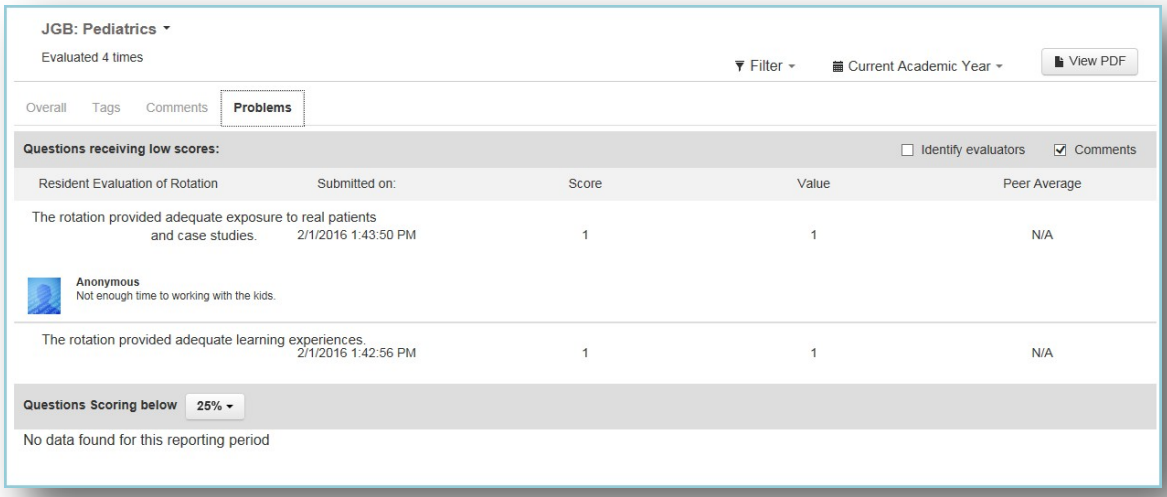
PROBLEMS TAB

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 dropdown list
3. Click the **Rotations** tab
4. Click on a rotation name
5. Click on the **Problems** tab



FACULTY VIEW

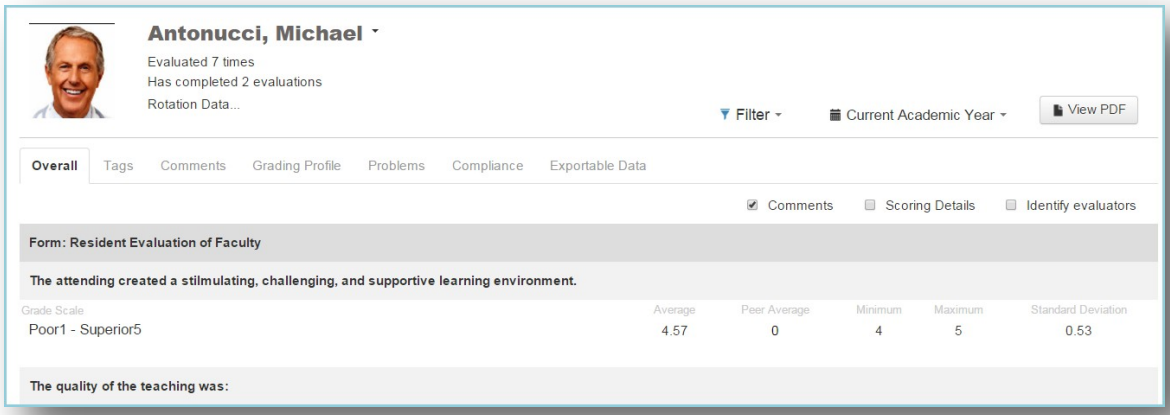
Faculty members can view the results of evaluations completed about them if the session settings allow the faculty (subject) to see their results.

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

OVERALL REPORT

This report displays the following information:

- Name of the evaluation form
- Question text
- Their average on that question
- The Minimum and Maximum scores received, along with the Standard Deviation
- Check the box for 'Scoring Details' to view a graphic representation of the results



OTHER REPORTS

Faculty members can also select the following Tabs to view more evaluation results:

- Tags – Displays evaluation results from questions that have been 'tagged' to a Custom Tag
- Comments – Shows comments made by evaluators
- Grading Profile – Displays the faculty member's average score given for each question and the average score given by other faculty members
- Problems – If configured, this page shows two areas:
    - Questions receiving low scores – Results from questions marked to give Low Score notifications
    - Questions scoring below 25% - Results that fall below a certain percentage (Select other percentages from dropdown list)
- Compliance – Shows compliance rates for completing evaluation assigned to you
- Exportable Data – Displays the actual scores given by evaluators

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.

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.

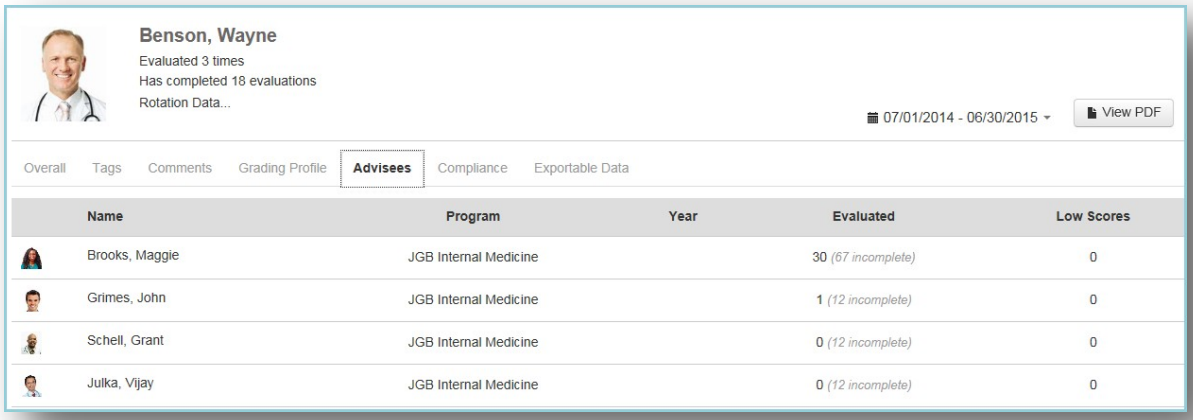
Generate the Advisor Reports:

1. Go to *Evaluations > Reports*
2. Click the **Advisees** tab

OVERALL REPORT

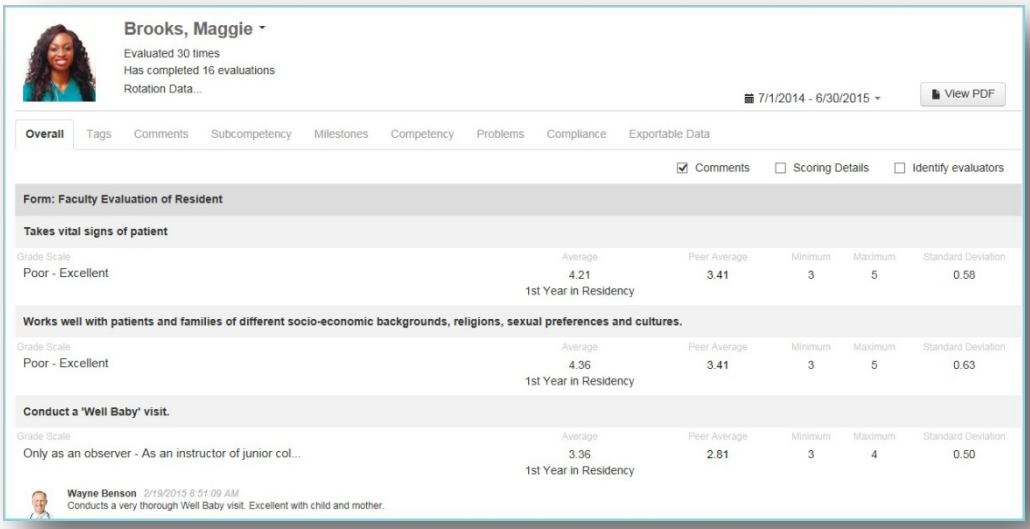
The Advisor can view all of their Advisees on this screen including:

- Name, picture, program and Year in Residency of the trainee
- Evaluated – The number of evaluations completed about 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 evaluation results. Select each tab to view the evaluation data gathered about the resident. See the details listed in the Resident Reports area of this document for more information.



Residents and fellows can view the results of evaluations completed about them if the administrator has allowed them to see their own results.

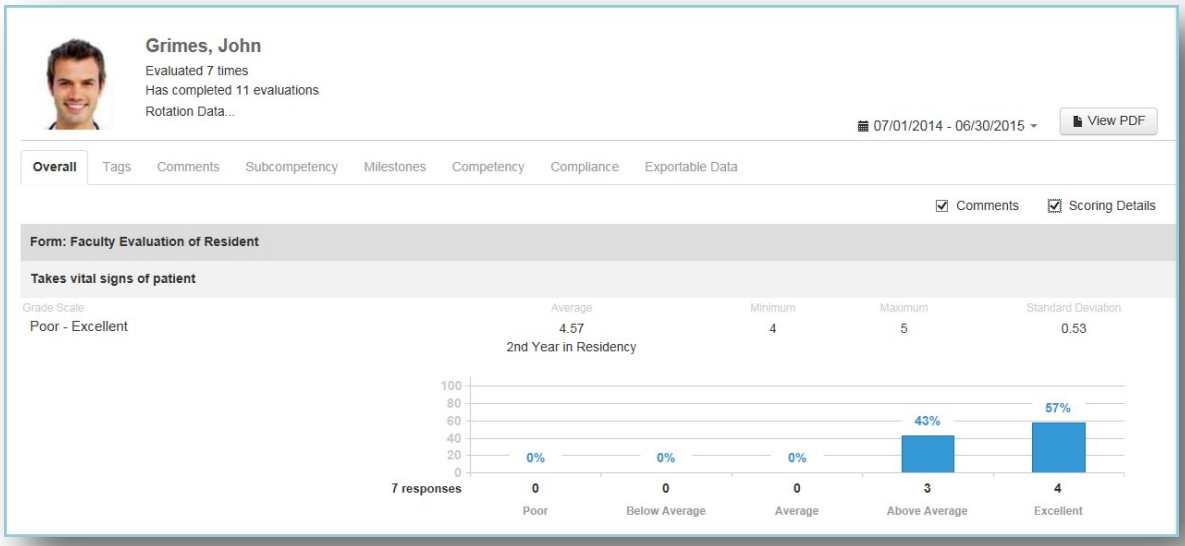
1. Go to *Evaluations > Reports*
2. Click the **Overall** Tab

OVERALL REPORT

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

This report displays the following information:

- Name of the evaluation form
- Question text
- Grade scale used
- 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

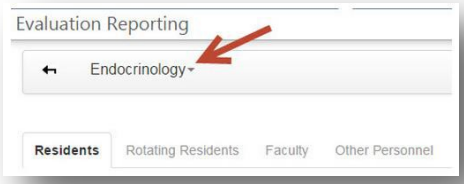


Residents can click on the other tabs to view more details about their evaluation results.

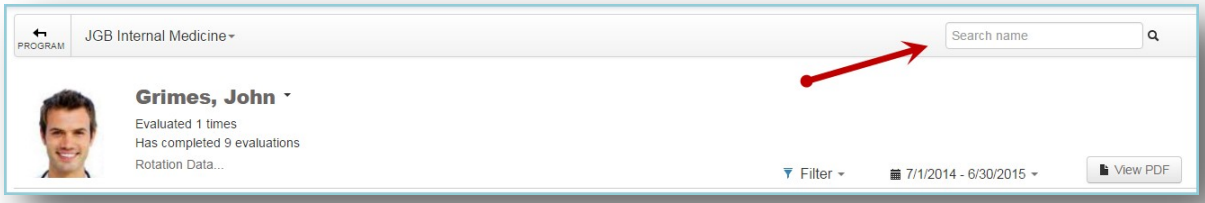
GENERAL FEATURES

PROGRAM SELECTION

Access all the programs where you have privileges by clicking the arrow and selecting a program from the dropdown list.

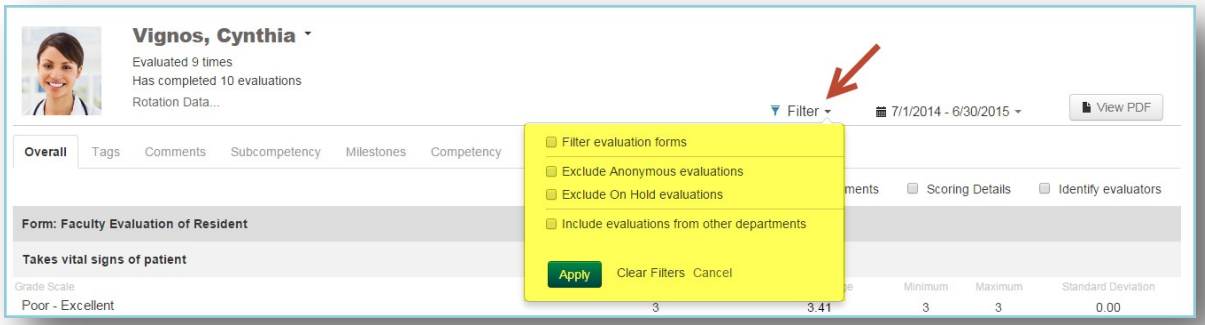


Enter a person's first or last name in the Search Box to access their evaluation data.



Use the Filters to select specific evaluation forms or to change the default settings for evaluation reports. The default settings are to display:

- All evaluation forms
- 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. Make additional selections, if necessary.
3. Click **Apply**

The Filters you select will remain in place (sticky) until you select another program. If you close New Innovations and then reopen it, a popup message will notify you that your previous filters are still in place.

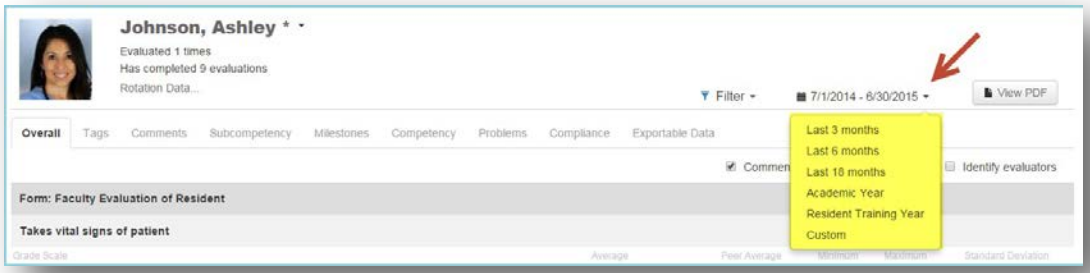
The Filter icon will be 'blue' if there are any changes to the default settings. To clear the filters and return to the default settings:

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

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

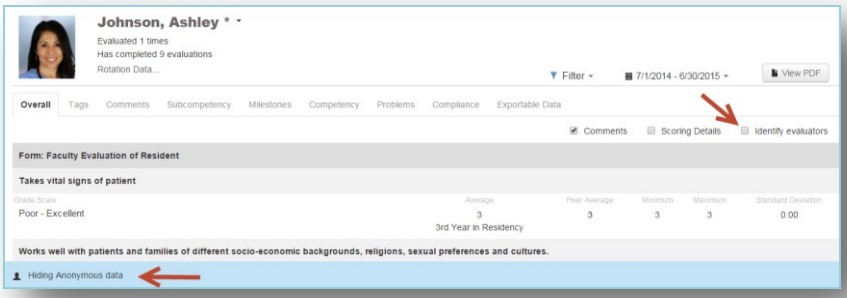
- Last 3, 6 or 18 months
- Academic Year - Once you select an academic year, you have the option to select an interval. Click **Apply**.
- Resident Training Year
- Custom - Select a specific date range and click **Apply**.

The dates you select will remain in place until you exit New Innovations.



IDENTIFY EVALUATORS

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



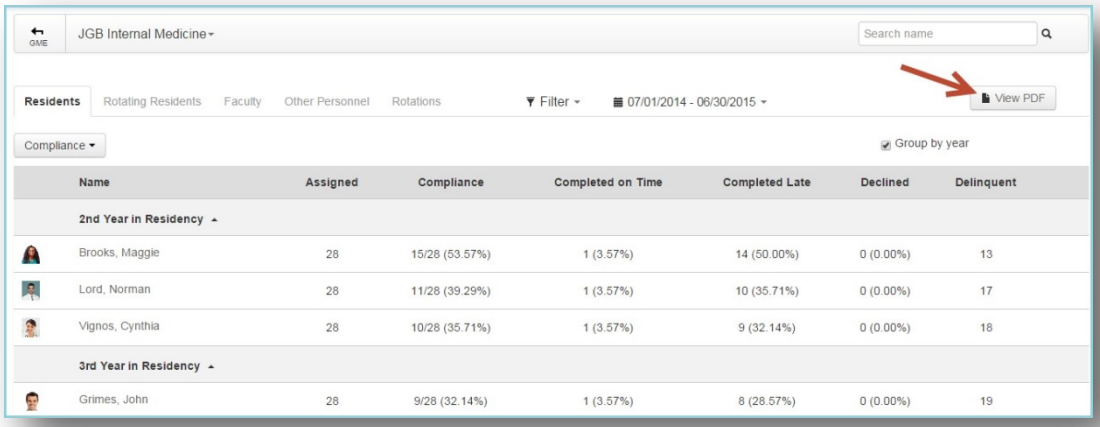
PRINT/VIEW PDF

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

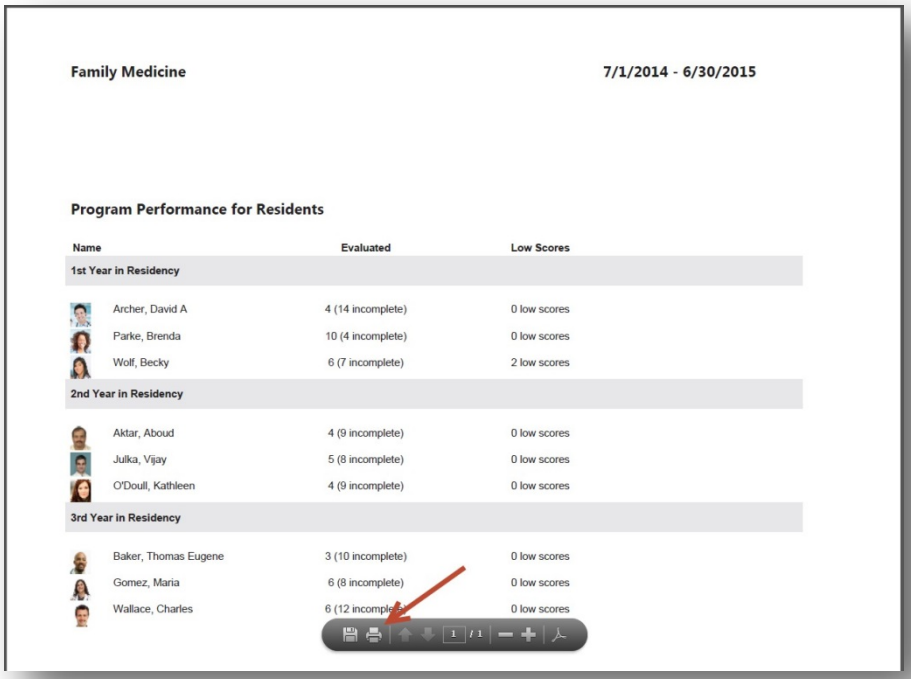
Print an Overall Program Report

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.

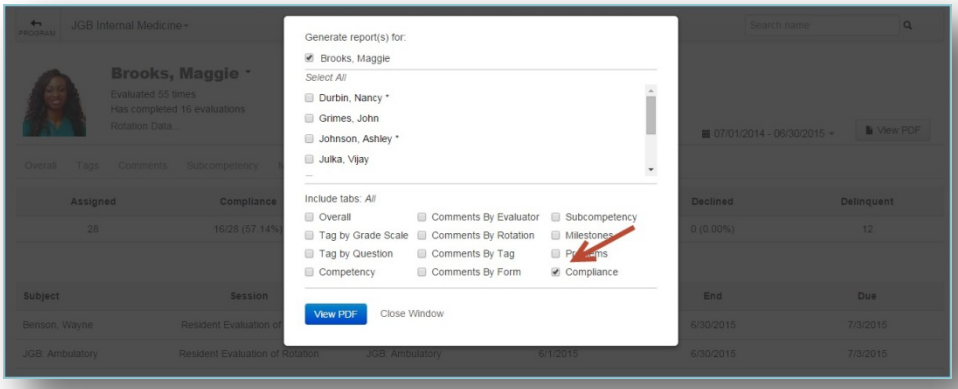


4. Hover at the bottom of the screen and click the **Printer** icon. (Your icons may appear different depending on your browser.)
5. Select your print settings
6. Click **Print**



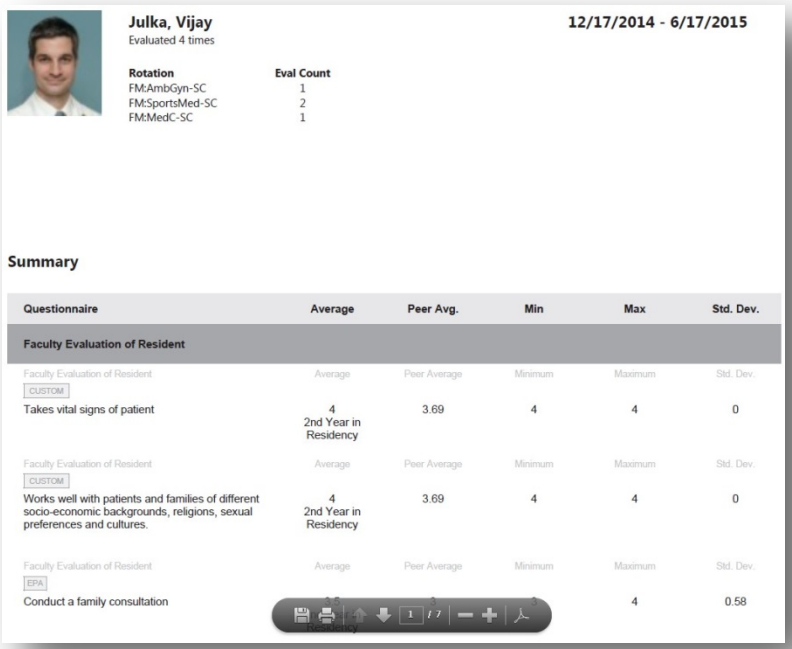
Print an Individual Person Report

1. Go to *Evaluations > Reports*
2. Select a person
3. Select the tab (report) and filters
4. Click **View PDF**
5. Verify that the box in front of the person you want is checked
6. The report you are viewing will be checked. Check the boxes for any other tabs (reports) you want to print
7. Click **View PDF**



8. The document will open in a new window. Hover at the bottom of the screen and click the **Printer** icon.

9. Select your print settings
10. Click **Print**



Julka, Vijay
Evaluated 4 times

12/17/2014 - 6/17/2015

Rotation	Eval Count
FM:AmbGyn-SC	1
FM:SportsMed-SC	2
FM:MedC-SC	1

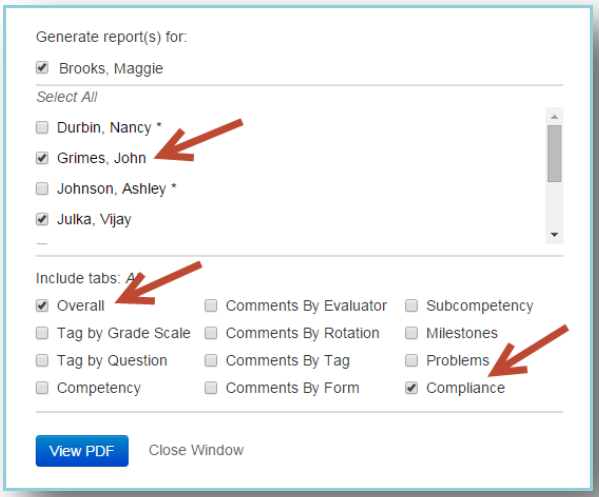
Summary

Questionnaire	Average	Peer Avg.	Min	Max	Std. Dev.
Faculty Evaluation of Resident					
Faculty Evaluation of Resident CUSTOM Takes vital signs of patient	Average 4 2nd Year in Residency	Peer Average 3.69	Minimum 4	Maximum 4	Std. Dev. 0
Faculty Evaluation of Resident CUSTOM Works well with patients and families of different socio-economic backgrounds, religions, sexual preferences and cultures.	Average 4 2nd Year in Residency	Peer Average 3.69	Minimum 4	Maximum 4	Std. Dev. 0
Faculty Evaluation of Resident EPA Conduct a family consultation	Average	Peer Average	Minimum	Maximum 4	Std. Dev. 0.58

Note: The Exportable Data tab will not print using this process because of the large amount of data on this report. Click **Excel** on that screen to export the data to a spreadsheet format, which is then printable.

Print Reports for Multiple People

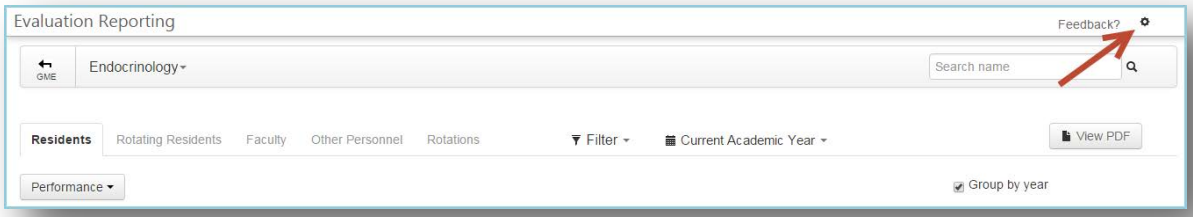
1. Go to *Evaluations > Reports*
2. Select a person
3. Select a tab (report) and any filters
4. Click **View PDF**
5. Select your people
    1. Click **Select All** or
    2. Check the boxes in front of selected individuals
6. Check the boxes for the tabs (reports) you want printed
7. Click **View PDF**



8. Your reports will be generated and emailed to you momentarily
9. Open the email and print the report

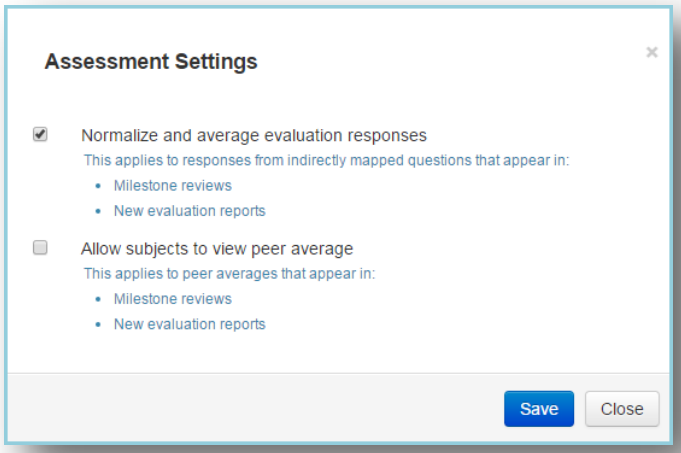
ASSESSMENT SETTINGS

While on one of the program-level reports, click the **Gear** icon to configure the Assessment Settings. These settings affect both the Evaluation Reports and the evaluation results in Milestone Reviews. (The Assessment Settings are also available in Milestones by going to *Portfolio > Milestones > Settings > Assessment Settings*.)



Default Settings: (See more details below)

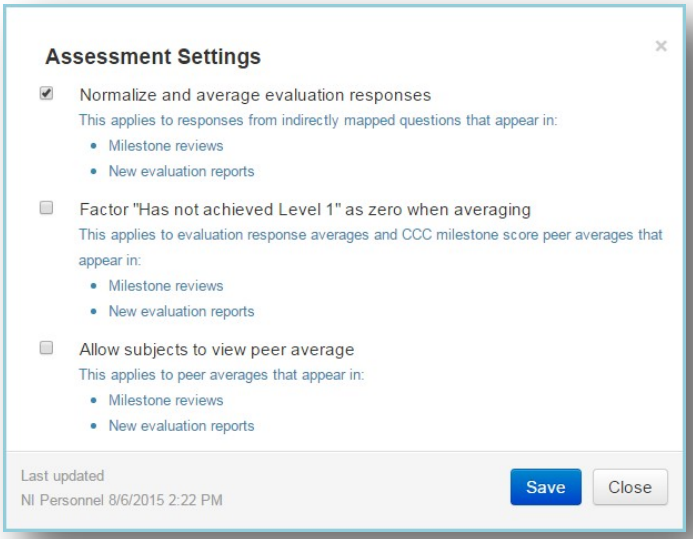
- Normalize and average evaluation responses – Checked
- Allow subjects to view peer average – Not Checked



Note: Some programs have an extra column on their milestone subcompetencies that says 'Has not achieved Level 1' or similar wording. These programs will an additional checkbox in their Assessment Settings. The default settings for these programs are:

- Normalize and average evaluation responses – Checked
- Factor 'Has not achieve Level 1' as zero when averaging – Not Checked
- Allow subjects to view peer average – Not Checked

Check the boxes to enable the settings. Explanations are included below.



- **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, general 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 general questions to a 1 - 5 grade scale.

The following formula is used to normalize grade scales on general questions that are other than 1 - 5. All the scores are then averaged.

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

Where:

m = Minimum Milestone Value (0 or 1)
M = Maximum Milestone Value (4 or 5)
p = Rating scale 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 - General 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 template for 'Has Not Achieved Level One' or similar wording. If you would like 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 members to view the Peer Average on the Overall Report, Tags Report and in the Milestone Reviews. Check the box in the Assessment Settings to allow this column to appear for residents and faculty.

  Note: The Peer Average column will still appear in reports generated by an administrator, even if residents and faculty members are not permitted to see it.