New Innovations (RMS)
Introduction to Evaluations & Creating Evaluation Forms

MMCGME
Metro MN Council on Graduate Medical Education

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Introduction to Evaluations

- Evaluations can help you monitor program performance from multiple angles.
- Each program develops its own evaluation forms from scratch.
- Then "sessions" distribute those forms. Sessions match an **evaluator** (the person completing the evaluation) to a **subject** (the person, rotation or program being evaluated).
- After the forms are distributed, you can monitor the evaluation process to ensure correct matches are made and that evaluations are completed on time.
- In the end, results compile for reporting.

Evaluation Types

(most common evaluation types are bolded below)

- **Faculty Evaluation of Learner (Resident and Fellow)**
- **Learner Evaluation of Faculty**
- **Learner Evaluation of Rotation**
- **Faculty and Learner Evaluation of Program**
- Self-Evaluations
- 360 Evaluations--peer reviews, nurse/patient evaluation of resident
- On-demand evaluations--praise/concern cards, shift cards

Sessions

Each form needs a session to distribute the form.

A Session is comprised of administrative settings and preferences that guide the distribution of the evaluation forms. Elements of a session include:

- The evaluation form
- Evaluator statuses
    - Faculty
    - Nurses
    - Residents or Fellows
- Subject statuses (for evaluations of people)
- Rotation names (for evaluations of rotations)
- Dates
    - evaluation period
    - available date
    - due date
- Email notifications
    - Available to complete
    - Delinquent with optional periodic reminders
    - Periodic reminders for On Demand

- Signature requirements
    - Evaluator
    - Subject
    - Program Director of Trainee
    - Advisor of Trainee
    - Named individuals such as Assoc. PD or preceptors for a specific rotation
- Anonymity Settings
    - Subject Anonymity
    - Evaluator Elective
    - Total Anonymity
- On Demand options for evaluators to select subjects or subjects to select evaluators

Each session can be built for one or multiple evaluation intervals within an academic year such as monthly, quarterly or yearly. Build a unique session for each type of evaluation you wish to distribute.

Typical Matching Technique Per Eval Type

Automatically matched via the block schedule	Manually matched by the administrator	Automatically matched via personnel records (reside in departments owning programs or who have a faculty appointment in that program)
• Faculty Evaluation of Resident • Resident Evaluation of Faculty • Resident Evaluation of Rotation	• 360 Evaluations • Self Evaluations • Peer Evaluations	• Resident Evaluation of Program • Faculty Evaluation of Program

An administrator can also add manual matches to any session and in any interval, even if it was configured to automatically match.

Before Creating Sessions
Have these ready:

1. Demographic records for all individuals who will be evaluators or subjects
2. Block schedules for all individuals who will be evaluators or subjects (required for **automatic matching**)
3. Evaluation forms

Evaluations Access by Level

Level 6
Complete evaluations; Sign evaluations as subject
View completed evaluations by and about self (excluding anonymous)
View evaluation reports about self
Return Declined evaluations
Send delinquent reminders
Complete evaluations for others
Generate static and custom evaluation reports
Release 'On Hold' evaluations
Create and edit Evaluation forms
Create and edit sessions
Modify evaluation results
View High/Low scores on forms.

Level 5
Complete evaluations
Sign evaluations as subject
View completed evaluations by and about self (excluding anonymous)
View evaluation reports about self
Return Declined evaluations
Send delinquent reminders
Complete evaluations for others
Generate static and custom evaluation reports
Release 'On Hold' evaluations
Create and edit evaluation forms
Create and edit sessions
Modify evaluation results
View High/Low scores on forms.

Level 4
Complete evaluations
Sign evaluations as subject
View completed evaluations by and about self (excluding anonymous)
View evaluation reports about self
Return Declined evaluations
Send delinquent reminders
Complete evaluations for others (excluding anonymous)
Generate static evaluation reports

Levels 3, 2, 1
Complete evaluations
Sign evaluations as subject
View completed evaluations by and about self (excluding anonymous)
View evaluation reports about self

Glossary

Anonymity Options - The choices made by an administrator within a session about whether the evaluator's information should be hidden from the subject. There are four options:

- None - Allows the subject to see who completed the evaluation.
- Elective Anonymity - Allows the evaluator to choose whether their identifying information should be hidden from the subject.
- Subject Anonymity - Hides the evaluator information from the subject. Authorized administrators may view the information.
- Total Anonymity- Permanently and irrevocably removes the evaluator's name for all viewers. Hides the status type, evaluation dates, and rotation name from the subject. Administrators will be able to view this information on certain screens, such as View Evaluations and High/Low Scores.

Decline - An evaluator can decline an evaluation that has been assigned to them by checking the 'Decline' option. The administrator can return the evaluation to the evaluator for completion after it has been declined. The evaluator cannot decline the form a second time.

Email Settings - Can be configured to alert people when evaluations are available for completion, are overdue or when a signature is needed. Email can also be configured to alert designated people about High/Low scores and when evaluators return an evaluation as NET.

EPA - 'Entrustable Professional Activity.' EPAs are used on evaluations where faculty members rate their level of trust in the resident to perform an activity independently.

Evaluation Form - Any type of electronic form that allows evaluators to rate a person, rotation or program.

Evaluation Form Relationships - Relationships created so that specific evaluation forms are sent out according to the rotation and/or status type. These relationships allow you to use several forms in one session.

Evaluator - A person who is assigned an evaluation form for rating a person, rotation or program.

Interval - The length of time for a rotation either by month or number of weeks. For example, intervals in an academic year may be divided into 12 (months) or 13 (4 week periods). Evaluations are often distributed according to the intervals.

Lock - Sessions can be locked to prevent changes to the configuration. Level 5 can lock a session. Other Level 5 users cannot unlock it. Only Level 6 users can unlock any session. When a session is locked, the only changes that can be made are adding matches.

Matches - Pairings made between an evaluator and subject of an evaluation. These can be created in several ways:

- Automatic Matches - Matches made by the software between an evaluator and subject according to their common scheduled rotation. After a session is created according to the settings, the matches are created automatically at the beginning of each interval according to the block schedule. These evaluations are then distributed to the evaluators at a time designated in the session.
- Manual Matches - Matches are made 'manually' by an administrator where the evaluator and subject are hand-selected for an evaluation.
- On-Demand Matches - Matches are created 'on-demand' by either the evaluator or subject. On-demand evaluations are only available when using the on-demand feature.

Milestones - Evaluations can be designed to include your own questions, the ACGME published subcompetencies and milestones, along with EPAs. Results can be made available in Evaluation Reports and to your Clinical Competency Committee when they're completing a resident's Milestone Review. The types of questions include:

- General Questions - Evaluations can include questions and grade scales designed in your own words. The results can then be available in reports, plus mapped to milestone subcompetencies for use by the CCC.
- EPAs - Entrustable Professional Activities (EPAs) can be added to your evaluation forms with a special Entrustment Scale. The results are provided to your CCC under the subcompetency or milestone of your choice.
- Milestones - Place your program's published milestones directly on your evaluation forms Results are displayed to your CCC under the Shift Evaluations.
- Shift Cards - Shift Cards are daily evaluations that contain the individual milestone narratives. Results are displayed to your CCC under the appropriate subcompetency.

Milestone Evaluation Template - Some subspecialties have agreed upon a set of evaluation forms and milestone mapping for evaluating their residents and for providing evaluation feedback to the CCC. We have created some Milestone Evaluation Templates that contain the exact forms and specific milestone mapping of the following programs:

- Neurosurgery (CMS Codes: Allo-1600 and Osteo-4300) - On hold until permission is granted by the Neurosurgery board regarding copyright concerns.
- Endocrinology (CMS Codes: Allo-1406 and Osteo-3913)
- General Surgery (CMS Codes: Allo-2450 and Osteo-3650)
- Pediatric Cardiology (CMS Codes: Allo-2004) - Only available to those who have a paid membership in the Society of Pediatric Cardiology Training Program Directors (SPCTPD).

On-Demand Evaluations - On-Demand evaluations can be configured to allow a person to create an evaluation match when needed rather than being assigned the evaluation. There are two types of on-demand evaluations:

- Evaluators - Evaluators can choose the subject, evaluation form and date of the evaluation.
- Subjects - Subject can create an evaluation, requesting someone else to evaluate them. They choose the evaluator, evaluation form and date of the evaluation.

Questions - Build your evaluation forms using a variety of types of questions:

- Custom Question - Create a custom question and grade scale written in your own words.
- EPA - Entrustment Professional Activity - Entrustment questions are written in your own words and use an 'Entrustment Scale' rather than a regular grade scale.
- Milestone - Place your program's milestone narratives on your form
- Subcompetency - Place your program's subcompetencies on your form
- Subcompetencies - Evaluations can include your program's actual milestone subcompetencies. You select which subcompetencies should appear on an evaluation for each rotation (rotation-based) or select subcompetencies that will appear on all resident evaluations, regardless of rotation. The results are then provided to the CCC.
- Custom Subcompetencies - Create your own subcompetency-style question using our blank template. Add your own verbiage to the Level headings and the narratives within each level, plus choose the grade-scale you prefer. Results can be mapped to show results to your CCC.

Session - The word 'Session' is a New Innovations term used to describe the feature that distributes your evaluations. Within a session, you designate the evaluator, subject, rotations, evaluation forms, email notifications, anonymity settings and distribution schedule of your evaluations.

Session Manager - This screen allows you to view, edit and filter your evaluations by session, evaluator, subject, rotation or date.

Signatures - A session can be designed to ask for signatures from the subject and evaluator of an evaluation, and also from the Program Director and other designated personnel. The configuration can also include options to send an email to the signer. A general comment box, and confidential comments to the subject's Program Director are always included.

Status Types - Used in a session to designate who is the evaluator and who is the subject of an evaluation. For example, if an attending will be evaluating a first year resident, the status types used may be 'Faculty' and 'RL 1.'

Subject - The person or thing being evaluated, such as a resident, faculty member, rotation or program.

Tags - A tag, such as Medical Knowledge or Patient Care, can be linked to questions on a form to group similar types of questions for reporting,

Do's & Don'ts for Creating Good Forms

Do

- Make the purpose obvious
- If there's any doubt about what you expect, explain it
- Give *short* instructions
- Put the most important information first
- Split questions on large forms into logical groups
- Make your forms consistent
  Use the same layout if possible. This way, evaluators don't have to figure out what's going on before consuming the content
- Put yourself in the evaluator's shoes - find out their preferences and what annoys them
- If at all possible: watch people interact with your forms
  Do they struggle with the formatting, responses, content of questions?
- When building rating scales for questions, build the scales from left to right, which is lowest to highest. This is important so that the evaluators score the subjects correctly and reporting is accurate.

Don't

- Use jargon-simple, obvious terms are better than jargon (even for doctors)
- Make anything any longer than necessary..The longer the form, the less likely it is they'll complete it
- USE ALL CAPS-(IT'S HARDER TO READ)
- Italicize everything -Italicized text is harder to read, especially for dyslexic readers
- Write long label names
- Provide too many response options
  It becomes confusing

Creating Learner, Faculty or Rotation Evaluation Forms

Character limits

These limits apply to all evaluation forms except for program evaluation forms

- Heading: 100
- Internal Name: 100
- Title: 255
- Subtitle: 255
- Overall Instructions: 2500
- Section Divider: Header: 255
- Questions instructions: 1000
- Questions: Question Text: 1000
- Response Options: 250
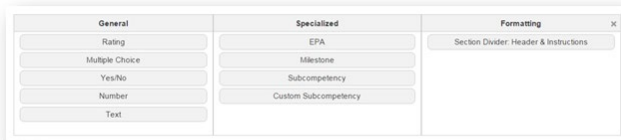- Grade Scale Labels: 750

Create & Name a Form

1. Go to Evaluations > Evaluation Forms > click the + Add New button
2. Type in an Internal name

This name is visible to admins only. Admins will only see it when distributing forms. Feel free to use abbreviations. Give internal names that describe the form's purpose, such as "Faculty Evaluation of Resident" or "Resident Evaluation of Rotation." This way, you can identify the correct form when sending it out in a session.

3. Type in a **Title**. This name appears to the evaluator and on reports.
4. Optionally, enter a **Subtitle**. Subtitles display beneath titles and can help orient an evaluator.
5. Optionally, add **Instructions** for the evaluator. Character limit: 750.
6. **Overall Comments** are allowed by default. Toggle the radio buttons to turn them off.
7. Click **Continue**. Now you can add questions to your new form.

Add Questions

1. Click Add a Component
2. Add any General or Specialized question type (you can also add a Formatting element)

Add General Questions

Ratings Question

1. Click Add a Component > General > Rating
2. Enter the question text
3. Enter responses. You can:
   - Use an existing set of responses:

     a. Click **Rating Scale ▾**
     b. Choose any saved rating scale

   - Add options by clicking
     You can have up to 12 options
4. Each option has a default value, starting with 1. You can change the value, but the values must be in ascending or descending order. The values reset themselves when you add or remove a choice. Values can contain decimal points to create half points.
5. Values don't appear on the form but **Option Labels** do. Enter a label for each option in the scale so evaluators know what they are choosing.

6. Click to remove an option
7. Click to set low or high score notifications. See Setting Other Question Options below for details
8. Click **Save.** Now you can add other questions to your form

Multiple Choice Question

1. Click Add a Component > General > Multiple Choice
2. Enter the question text
   Example: Where should we hold the Winter party?
3. Check **Multiple Responses** if you want the evaluator to be able to select several options instead of just one
    Example: Choose each location where you trained on this rotation
4. Enter each choice in the **Option Label**

5. Click to add more choices

6. Click at the end of the row to remove a choice

7. Click to set low or high score notifications. See below for High/Low tips
8. Click **Save.** Now you can add other questions to your form

Yes/No Question

1. Click Add a Component > General > Yes/No
2. Enter question text
   Example: Did you have enough time to prepare for rounds each day?
3. Enter any alternative labels for Yes and No

4. By default a is next to the top response and a is next to the bottom response. You can click the gray check to swap gray and green positions.
   Put the green check next to the more desirable response. The green check indicates, "If an evaluator picks this option, all is well."
   Example: For the question, "Dropped the infant" - you'd probably set Yes to gray, No to green
   Example: "Is the resident making sufficient progress?" - Yes is green, No is grey

5. Click to set low or high score notifications
   Example: If your question is "Is the resident making sufficient progress," a low score notification can alert you as soon as an evaluator says "No." This notification could give you a chance to take corrective action
6. Click **Save**

Number Question

1. Click Add a Component > General > Number
2. Enter the question text
3. Enter the minimum value you want to allow any evaluator to enter
4. Enter the maximum value
   Evaluators see the permitted range and can only submit a number within that range.
5. Click **Save**

Text Question

1. Click Add a Component > General > Text
2. Enter the question text
   Example: How can we improve?
   Character limit for the evaluator's response: 250
3. Click **Save**

Other General Question Options

Score Notifications

You can set automatic notifications for low and high score responses.

Low Score Notification: ⌄   Sends a notification to selected persons whenever an evaluator picks this response. The options arrow changes to red.

High Score Notification: ⌄   Sends a notification to selected persons whenever an evaluator picks this response. The options arrow changes to green.

Nothing: Click to remove any notification settings from this response

Default Response

Set as the default selection: Cause this question to appear to an evaluator with this option already selected. You can only set one default per question. If you pick a new default, the previously selected default is replaced.

Allow N/A

Check the **N/A** box to let the evaluator mark the question as "not applicable." You can type in your own N/A label.

Require Responses

Check **Require Response** to force a response. If a required question is not answered, the evaluator cannot submit the form as complete.

Comments

Check **Allow Comments** if you want evaluator comments on this specific question. (Another way to get comments: check **Include Overall Comments** at the bottom of the form. This selection permits comments that are not tied to an individual question. Overall comments will not be visible in the CCC review, while question-specific comments will be included if the question itself is tagged to Milestone subcompetencies.)

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Require comments

You can set a question's comments to:

- Not required
- Required with Any Response
- Required with High or Low Response. (Use this option when you'd like the evaluator to explain a high or low score.)

Add Tags

Under Competencies and Tags, click **Add one here...** to add a tag. For resident and fellow evaluations, tags are especially useful for associating questions with ACGME milestones.

- For learner evaluations: Select a Core Competency (these do not appear in CCC reviews. Try using subcomp tags instead), or Milestone Subcompetency or type in a custom tag. Custom tags can be useful for your own reporting schemes.
- For other evaluations: type in a custom tag

Add Specialized Questions

Use these question types for evaluations of learners only.

EPA Question

1. Set up an "Entrustment Scale" for your program
2. Click Add a Component > Specialized > EPA
3. Your previously created EPAs are stored within a library of EPAs. Select from your existing EPAs or add a new one
4. Optionally Require Response
5. Optionally uncheck **Include Comments**
6. Click **Done**

Milestone Narrative Question

1. Click Add a Component > Specialized > Milestone
2. Select an ACGME "Milestones Project" from the first dropdown
    - Look for your medical specialty name. Some programs may include multiple subspecialties, so choose the one you want.
    - Other programs will have only one option in this dropdown
    - Other programs may see different milestone versions
3. Select a subcompetency from the second dropdown. Each subcomp contains multiple milestone narratives
4. Select any milestone narratives you want to add to this form
5. Optionally Require Response
6. Optionally uncheck **Include Comments**
7. Click **Done**
   The selected milestone narratives are now individual questions to your form

Subcompetency Question

There are two ways to put ACGME subcompetency questions on your forms:

A. Add subcompetencies directly to your form (instructions below)
B. Add subcompetencies to your form based on the learner's current rotation

Add a Subcomp **Directly** to Form

1. Click Add a Component > Specialized > Subcompetency
2. Select an ACGME "Milestones Project" from the dropdown
    - Look for your medical specialty name. Some programs may include multiple subspecialties, so choose the one you want.
    - Other programs will have only one option in this dropdown
    - Other programs may see different milestone versions.
3. Select any subcompetencies you want to add to this form
4. Optionally Require Response
5. Optionally uncheck **Include Comments**
6. Click **Done**
   The selected subcompetencies are now individual questions on this evaluation form

Custom Subcompetency Question

Custom subcompetencies are subcomp-styled questions with your own text filled in. Like EPAs and standard subcomps, they live in a library outside of any single evaluation form.

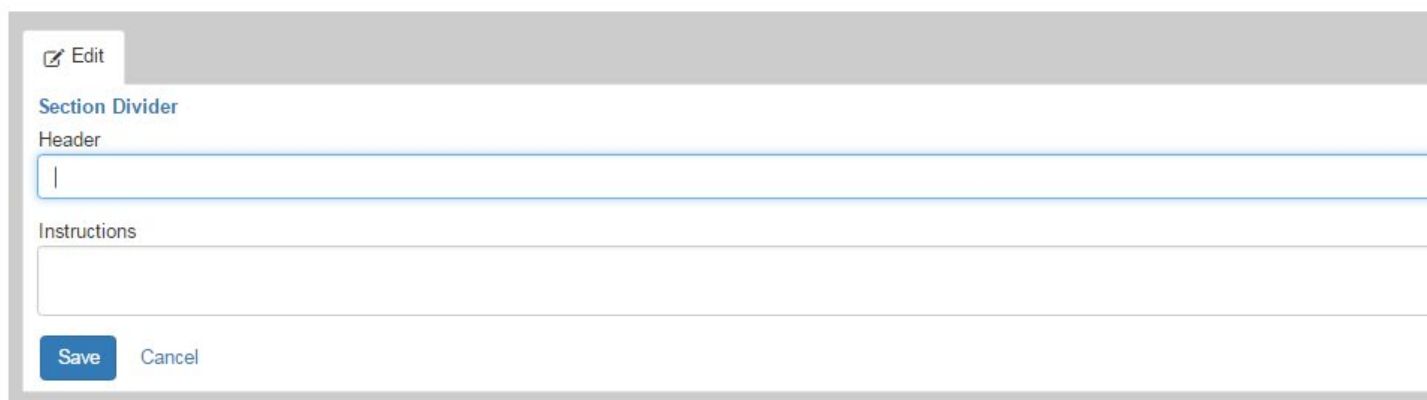Custom subcomps can serve a few different ends:

- Build your own curricular milestone questions
- Modify ACGME Subcompetency questions and get the same CCC Milestones Review functionality as with standard subcomp questions (to achieve this state, you'll also map your custom subcomps to ACGME subcompetencies)
- Build any other sort of question in the subcompetency format

Add a Custom Subcompetency to Your Form

1. Click Add a Component > Specialized > Custom Subcompetency
2. Your previously created custom subcomps are stored within a library of custom subcomps. Select from your existing custom subcomps or click **+ Add New** and read here about creating a new custom subcomp
3. Optionally Require Response
4. Optionally uncheck **Include Comments**
5. Click **Done**

Add a Section Divider or Instructions

1. Click **Add a Component** where you want to add instructions or a divider
2. Click Section Divider: Header and Instructions
3. Type into the Header and/or Instruction field. Character limit for instructions: 255
4. Click **Save**

Move a question, section divider or instruction

1. Hover over the question
2. Click **Move**
3. Click **Place** above the space where the question should go on the form
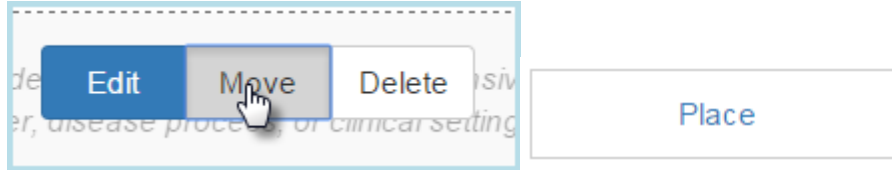
Save Your Form

After all questions have been added to your form:

1. Click **Done** or
2. Click **Preview Evaluation Form** to view what the evaluator will see

Include Rotation-Based Subcompetencies

You can add milestone subcompetency questions that show or don't show depending on the rotation using the form.

To make your form display any rotation-based subcompetencies that are already configured, take these steps:

1. Click the **Milestones** tab at the top of the form

2. Click the **None** dropdown

3. Pick Rotation
4. Click **Done** to save the change. This is just one of the locations where you can set your form to include rotation based subcompetencies.

Creating a New Custom Subcompetency Question

Before you make your first custom subcomp, the custom subcompetency library is empty. Populate your library to gain custom subcomps you can add to any learner evaluation form.

1. Go to Evaluations > Evaluation Forms
2. Click Components
3. From the dropdown list, select **Custom Subcompetencies**
4. Click Add New
5. You'll see this template

6. Enter a **Title** for the custom subcompetency
7. Click 'Level 1' if you need to change the names of the column headers

8. Click the in the first level
9. Enter "detail text" in the box. This text is the custom "milestone narrative" within your custom subcompetency
10. Click **Save**
11. Click the + again and add as many narratives as needed for that level
12. Add narratives to each level until complete
13. Click **Edit** to change the rating scale
14. Optionally uncheck Include an N/A Option.
15. Optionally change the N/A option's label from "Not applicable"
16. If you are building this custom subcomp within an evaluation form (it will still live in the library of custom subcomps) you can:
    a. Optionally Require Response
    b. Optionally uncheck Include Comments
17. If you'd like to map this custom subcompetency to milestones, click the **Map to Milestones** button at the bottom of the page. Map to milestones if you want responses to this question to appear in CCC Milestones Reviews and milestone reporting:

a. Check all of the milestone subcompetencies you want this custom subcompetency to be mapped to. Those checked subcompetencies are the subcompetencies that will display this question's results during a CCC Review

b. Click **Return** at the top of the page. Your changes are auto-saved

18. Click Done or Add Another custom subcompetency

Configuring Evaluation Auto-Login

When Auto Login is configured, evaluation emails sent to residents and faculty include a direct link to their evaluation. When they click it, they jump directly to that evaluation— without needing to log in.

- Go to **Evaluations** > **Setup** > **Auto-Login**
- Select the Work Roles that will be given the Auto-Login link in their emails
- Click **Save**

Set up Auto-Login Work Roles

Permit people assigned these work roles to receive Auto-Login links in email messages:

All | None | Invert |

- [ ] Administrator
- [ ] Faculty
- [ ] Medical Student
- [ ] Nurse
- [ ] Other
- [ ] Patient
- [ ] Physician Assistant
- [ ] Resident

Save | Cancel

Auto-Login for High/Low Score Notifications

When a user is identified as a recipient of a High/Low notification, they receive an email with the auto-login link. However, for security reasons, when the recipient clicks the link in the email, the system records the High/Low score page and forces the user to perform a conventional login. When that is completed, the system redirects the user to the High/Low score page.

Error Messages

On occasion, a user might receive an error message stating the user doesn't have the correct privileges to get into the software from the link. We suggest closing the browser, clearing the browser history and trying the link again. If this is not successful, please contact NI through a support ticket. Provide the error message and the browser used.

Evaluating Learners with Daily Shift Cards

Shift Cards are daily evaluation forms that contain only ACGME milestone narratives. Use them for assessing residents and fellows. Faculty members and others can access shift cards from the Evaluations module, their Home page or from email reminders. All programs with published milestones, except for combined programs, can evaluate their learners with shift cards.

Shift card evaluation results are included on the resident/fellow's Milestone Review for your Clinical Competency Committee and within Evaluation Reports.

Shift Cards are typically created as needed by the evaluator (on-demand), but if a coordinator creates a manual match for a Shift Card, the date on the evaluation is the date range of the interval (for example, "July") rather than a specific day. When the faculty member logs in to complete the evaluation, they can't change the date to a single date.
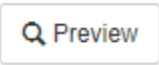
Create a Shift Card Form
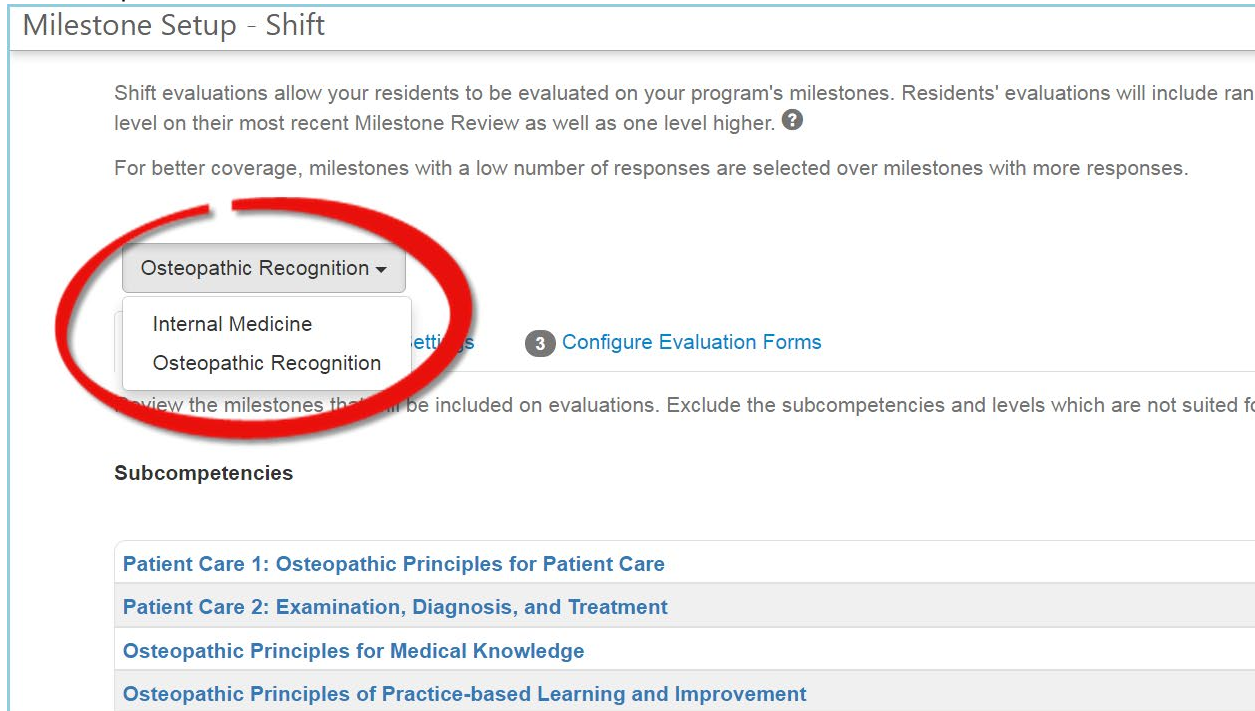
1. Go to Evaluations > Evaluation Forms
2. Click Add New
3. Internal Name - Shift Card
4. Title - Shift Card
5. Subtitle (Optional)
6. Instructions - Enter instructions to your faculty members (Optional)
7. Click Continue
8. Check the box to require Overall Comments (Optional)
9. Click Done

No further action is needed on the evaluation form. The next step is to configure the Shift Card to produce random-generated milestone questions.

Configure Shift Cards

1. Go to Evaluations > Milestones
2. On the Shift panel, click **Configure**
   On the Milestone Setup page for Shift Cards, there are 3 tabs
   You start of Tab 1 – Milestone Pool tab
3. Select the milestones that you want to be included in your pool of milestone questions. The system will randomly select questions from this pool of questions to create your Shift Cards.
   To show certain narratives depending on
   Use the selection tools to:
   - Select or deselect an entire level of questions
     For example, click '5' to remove all Level 5 questions from the milestone pool
   - Select or Deselect an entire milestone subcompetency
     For example, Remove PC 12 from all levels

   - Click [🔍 Preview] to view a sample Shift Card for each level
4. If you have Osteopathic Recognition and have <u>d</u>esignated this in the software, you can add Osteopathic milestone narratives to your Shift Cards as well
   a) Click the arrow beside your Program name and select Osteopathic Recognition
      The osteopathic subcompetencies appear
   b) Use the same process as shown above to create your pool of milestone questions
   c)
      The software will create your Shift Card by randomly selecting milestone narratives from the combined group of milestone questions, from both your Program's milestones and from the Osteopathic milestones.

5. If your specialty is transitioning milestones versions, you'll see "Specialty: Effective [Month Year]

Anesthesiology: Jul 2014 - Jun 2021 ▾

Anesthesiology: Jul 2014 - Jun 2021

Anesthesiology Milestones: Effective Jul 2021

6. Click **Settings** tab
7. Select the number of milestone questions you would like on each Shift Card
   The default is 10

10 ▾ Questions per 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.

Milestone Setup - Shift

Shift evaluations allow your residents to be evaluated on your program's milestones. Residents' evaluations will include random milestone questions from thei current level on their most recent Milestone Review as well as one level higher. ❓

For better coverage, milestones with a low number of responses are selected over milestones with more responses.

Internal Medicine

① Milestone Pool   ② Settings   ③ Configure Evaluation Forms

Select the number of milestone questions to place at the bottom of an evaluation.

5 ▾ Questions per card ❓

You can also indicate preset values for each resident's year in training. That way if a seasoned resident hasn't had a milestone review at your program yet, yo that resident at square one.

You have selected a default that does not have any levels mapped.

Entry Year	Preset Levels	Question Pool	Avg Responses per Question❓
Year 1	① ② ③ ④ ⑤	57	10
Year 2	① ② ③ ④ ⑤	114	5
Year 3	① ② ③ ④ ⑤	107	5

After a subcompetency is scored on a milestone review, questions will vary according to each resident's progress per subcompetency.

Tab 3 – Configure Evaluation Forms tab

A list of your evaluation forms will appear on the screen. To designate the form that will be used for Shift Cards:

Click the **None** in front of your form

1. Pick **Shift**
2. Click **Require** if evaluators are required to answer the milestone questions before being able to save their Shift Card

Creating Reusable Praise & Concern Cards

You can create Praise and Concern Cards and make them available as 'on-demand' evaluations to specified groups of people. We'll cover both sides of this two-part process:

- Create the evaluation form (Praise/Concern Card)
- Distribute the form (Make it 'on-demand' for evaluators)

Create Praise/Concern Card

1. Go to Evaluations > Evaluation Forms > Add New
2. Enter the Internal Name - Praise Card or Concern Card (required)
3. Enter the Title - Praise Card or Concern Card (required)
4. Enter a Subtitle (optional)
5. Add Instructions for the evaluator (optional) Character limit is 750. (line breaks are allowed in text)
6. Click **Continue**

7. Click Add a Component

8. In the General column, **select** the type of question you want to add.
   For example:
   - Rating Scale - Ask a question that allows evaluators to Praise a person or raise a concern
     a. Enter the question, select a rating scales, configure other options
     b. Click **Add**
   - Text - Praise and Concern Cards typically allow evaluators to describe a person, situation or incident
     a. Enter the question, configure other options
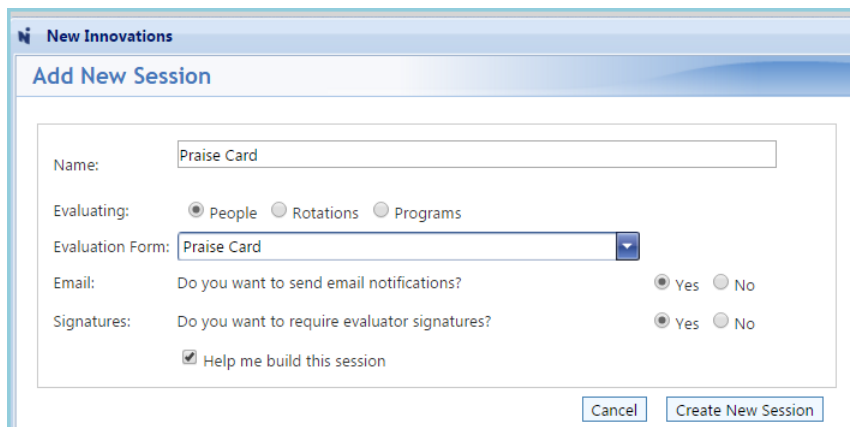   b. Click **Add**

Notes:

- Continue adding questions until form is completed
- Click Done when you're finished creating the form or if you want to stop and resume later
- Click Preview at any time to see what the finished product looks like

Distribute the Praise/Concern Card

Create a session that will make the Praise/Concern Card available to specific people as an on-demand evaluation.

1. Go to Evaluations > Add Session
2. For the **Name,** enter something like "Praise Card"
3. Choose Evaluating: **People**
4. From the dropdown, choose the **Evaluation Form** that you want to distribute
5. Keep email notifications set to **Yes**
6. Keep evaluator signatures set to **Yes**
7. Keep **Help me build this session** checked for extra tips
8. Click **Create New Session**
   Now we'll build the session through a series of tabs

People Tab

1. Select the evaluator status types from the dropdown list
2. Select the subject status types from the dropdown list
3. In the On Demand Evaluations area, check the box for Evaluators
   - The system will default to giving all people with the evaluator status selected above access to the session
4. Click Customize evaluator list if you want only specific evaluators to get this type of evaluation:
   a) Select the Status Type and Department to narrow the available evaluator list
   b) Click Show People
   c) Check the names of the evaluators who can complete these on-demand evaluations
   d) Click Save

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5. Select the date option display on evaluations:
   - Interval Date Range - Evaluation will cover the entire range of an interval, such as April.
   - Single Date - Evaluator can select the date of the evaluation. Note: When Single Date is selected, the On Demand option is not activated on the evaluator's Home page until the Start Date of each interval. The 'Available Date' is not taken in to account when 'Single Date' is used.
6. Click Save Changes

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 right labeled Active Rotations by clicking the single arrow button pointing to the left or double clicking on the rotation name. To move all, use the double arrow button.
3. Click Save Changes

Evaluation Form Tab

1. Confirm the name of the Evaluation form to be used in this evaluation.
2. If additional signatures are required, click **Add Signatures**.
3. Click Save Changes

Anonymity Settings

1. Select the proper anonymity setting
2. Click Save Changes

Anonymity Settings

- ◯ None - Evaluator identity is visible for anyone who may view the evaluation
- ⦿ Subject Anonymity - Evaluator identity is hidden from the subject
- ◯ Elective Anonymity - Evaluator may choose whether their identity is hidden from the subjec
- ◯ Total Anonymity - Evaluator identity is removed after submission

Access to Completed Evaluations

Hide completed evaluations ☐ from the Subject ☐ from the subject's Advisor

Settings Tab

Email Settings

1. Select Email options
2. On Demand Reminders can be sent to the Evaluators that the Praise/Concern Cards are available.
   Select how often these reminders should be sent.
3. Click Save changes

| 👥 People | 🌐 Rotations | 📄 Evaluation Form | ⚙ Settings | 📅 Match Schedule | 💾 Save Session |

Email Settings

☑ Email Notifications are enabled   ❓

Notification Type	Evaluator	Administrator		Message
Available for Completion	☑	☐		🔍 Customize
Declined		☐		
Delinquent	☑	☐	send every 0 days. Limit to 99 emails	🔍 Customize

Contact Information

The following details appear as the contact referral in messages sent to evaluators.

Name: Coordinator A   Email: coordinator@abc.com   Phone: Unknown

☐ Show advanced settings

Match Schedule Tab

1. Uncheck the box for Enable Automatic Matching
2. In the End of Session Settings area, check the box for Auto Copy when this session ends (Optional)
3. Check the box next to Send an email reminder when the session ends to, if you would like to receive a notification email when the session is copied. Enter your email address in the following field.
4. Auto Copy Settings – choose one of the following options:
   1. Use the interval dates in this session and increment the dates by one year
   2. Create the interval dates according to this pattern
      1. Enter a session name. (Required)
      2. Only enter the name of the session, not dates. The system will automatically add the dates for you when the next option is checked
      3. Check the box for Add dates to name if you would like the session to automatically add start and end dates to the session. For example, "Resident Evaluation of Faculty" becomes "Resident Evaluation of Faculty 2013 – 2014."
      4. Click **Save Changes** to save the above settings.
5. Click Add New Interval
6. Create Evaluation Schedule - Choose one of the following:
   - Use the academic year intervals
   - Set my own time beginning - Enter a start and end date and the number of intervals to divide the date range into.
7. Click Create Schedule
8. Make adjustments to the timeline, if needed:
   - Available for Completion - Does not apply to on-demand evaluations. The Praise/Concern Cards are available from the first day of the interval until the Due Date.
   - Due for Completion - This is the day that the link to create an on-demand evaluation will disappear from the evaluator's Home page. Use the dropdown list at the top of this column to adjust the dates for all intervals in this column.
9. Click Continue

10. The on-demand evaluations will be available on the Home page of those evaluator status types selected on the People tab

Notes:

- No matches need to be made. The evaluators will create their own matches.
- The completed Praise/Concern cards will be held in the appropriate interval as determined by the End Date of the evaluation. Ex: A Praise Card completed for July 21st will be found in the July interval.

Editing a Form Already in Use

If a form already has any responses, only edit it to correct minor errors like typos.

Why not make more substantial edits?

Because even inadvertently changing the meaning of questions will compromise the responses given by previous evaluators.

- For substantial edits, **Copy** the form and **Edit** the copy instead of editing the original. Then update any sessions to distribute the new form instead of the original.
- If a form has yet to be distributed, feel free to make any sort of edit

Fix a typo in a form in use

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 click **Save**
5. Edit questions by hovering over the question and clicking **Edit**. When you edit a question or grade scale, you get three choices. These choices depend on where the item is used. You can make changes to:
    - Just this question only (will only see if item is used elsewhere)
    - Everywhere on this form only (will only see if item is used more than once on the form)
    - Everywhere in this department (will only see this option if the question or grade scale is used on more than one form)

Some safeguards are in place to prevent and warn against disruptive edits. Make any allowed edits with care to preserve the integrity of your evaluation data.

You cannot make these edits:

- Copy questions on the form you are editing
- 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

You can make these edits:

- Edit text of existing questions
- Edit text of grade scale labels including text for N/A Modify extra grade scale options (hi/low/default). Milestone questions added by mapping them to the form cannot be edited. Use the custom Subcompetency option for instead of mapping.
- Move the location of questions
  Hover over question > click Move > click Place where you want it
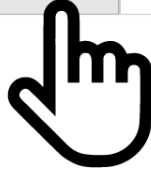
- Change default radio button selection for a grade scale
- Edit whether comments are allowed for a question
- Toggle between comments required or not
- Edit whether the question requires a response or not
- Edit minimum or maximum values for a numeric scale
- Add or delete high/low score designations
- Add or delete high/low score notifications
- Add, or delete milestone mapping
- Add or delete tags, core competencies or subcompetencies (both ACGME and OR)
- Change whether overall comments are required or not
- Edit Notifications by clicking the Notifications tab and adding or removing people from the Send To: list

Previewing Evaluation Forms

You can preview a form to see how it will look to evaluators.
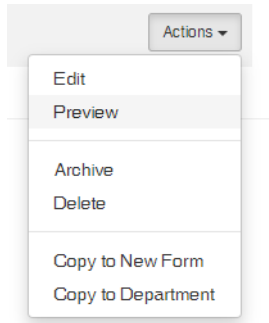
With the form open in the builder:

1. Click the **Preview** button at the top of the page

To preview any form in your library:

1. Go to Evaluations > Evaluation Forms

2. Click **Preview** from the Actions dropdown list

Adding Rotation-Based Subcompetencies to Evaluations

You can automatically add subcompetencies to your evaluation forms based on the learner's rotation. First, create your evaluation form, then read on to make rotation-based subcomps appear on your form.

Enable Rotation-Based Subcompetencies

Do two things to enable rotation-based subcomps to appear on a form:
1. Choose which subcompetencies can be added for each rotation
2. Designate which forms can get rotation-based subcompetencies

Stage One: Choose Subcompetencies

1. Go to Evaluations > Milestones
2. On the 'Rotation' panel, click Configure
3. On the 'Designate' tab:
   - Select a rotation from the dropdown list
   - Check the box(es) in front of the subcompetencies you want to include on the form when the resident is on that rotation. Use the **None** and **All** buttons for sweeping changes

For Osteopathic Recognition

If you have Osteopathic Recognition and would like to add the Osteopathic subcompetencies to the form, follow these steps:

1. Click Change Milestone Project ▼ Change Milestone Project
2. Select Osteopathic Recognition from the dropdown list
3. Click Save

For New Milestones Versions

If your specialty has new Milestone versions available, and would like to add Milestone subcompetencies to the form, follow these steps to choose which version you want:
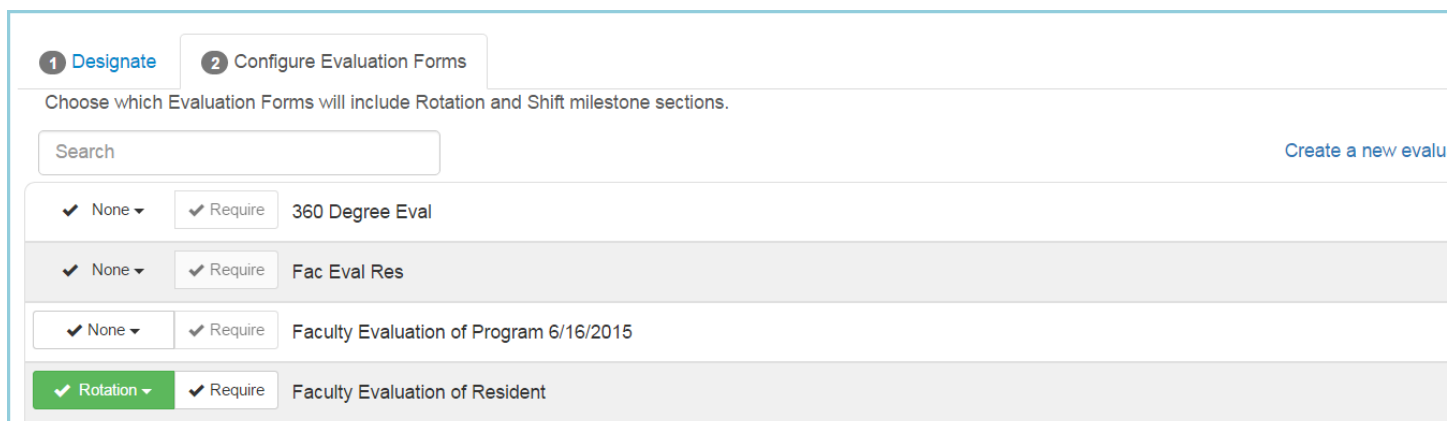
1. Click Change Milestone Project ▼ Change Milestone Project
    - Note: if this button is missing, your program is likely using the most up to date version of milestones
2. Select the new Milestone version or the previous Milestone version from the dropdown list. The previous version has a version indicator "(v.X)" added to its name.
3. Click Save

Stage Two: Select Forms

On the **Configure Evaluation Forms** tab:
1. Click **None** > **Rotation** for the form that you want these subcompetencies added to
2. Optionally click **Require** to force faculty members to answer the subcompetency questions

Check your Work

Click the Magnifying Glass icon to preview your evaluation form. At the bottom of the form is a place-holder section visible to you only:

Setting High & Low Score Notifications

Use High/Low Score Notices to email certain faculty, administrators and advisors when the subject of an evaluation receives a high or low score on an evaluation question.

Works for these question types:

- Rating scales (1 - 9)
- Yes/No scales

Does **not** work for

- subcompetencies
- custom subcompetencies
- EPAs
- milestone narratives

What's in the notification?

Only recipients with Level 5 or 6 privileges in Evaluations will be able to view the actual form that triggered the notification. Others with Level 2 or 3 privileges in Evaluations will get the email, but just see a list of subjects and the question with the high or low score.

Configure high or low score notifications

When creating a new form:

1. After adding the grade scale, click on the down arrow next to the value that should get a low score notification
2. Select Low Score Notification from the Option Settings panel. The arrow turns red to indicate the low score notice
3. Next, select the value from the grade scale that should be the high score. The arrow turns green to indicate the high score notification

4. To indicate recipients, go to the top of the form and click the Notifications tab
5. Click the blue plus icon to move the recipient from the box on the left to the Send To: box on the right
   - To have the subject's advisor notified, check the box at the bottom of the Send To: list to include advisor
   - To remove someone from the Send To: list, click the gray minus sign icon

Updating an existing form:

1. Go to Evaluations > Evaluation Forms
2. Find the form and click Edit from the Actions dropdown list
3. Hover over the question to add the notice to and select Edit
4. Click on the down arrow next to the value that should get a low score notification
5. Select Low Score Notification from the Option Settings panel. The arrow turns red to indicate the low score notice
6. Next, select the value from the grade scale that should be the high score. The arrow turns green to indicate the high score notification

7. To indicate recipients, go to the top of the form and click the Notifications tab
8. Click the blue plus icon to move the recipient from the box on the left to the Send To: box on the right
   - To have the subject's advisor notified, check the box at the bottom of the Send To: list to include advisor
   - To remove someone from the Send To: list, click the gray minus sign icon

Removing Unsupported Form Content (!)

If you see this symbol in the evaluation forms list: 🔔 then you're looking at a form with unsupported content.

That content could be:

- HTML (Bold, Underline, Italics, etc.)
- Two- or three-part questions
- Blank grade scales
- And other no-longer-supported types of content and styling
- Update these forms if you want to keep using them.
- If you don't distribute the form anymore, archive it instead of going through this update process

Copy original form

1. Go to Evaluations > Evaluation Forms

2. Find a form with a 🔔
3. Click **Actions** > **Copy to New Evaluation Form**
   All unsupported content is automatically removed from the copy
4. Recommended: rename the new form's internal name:
   - Keep the date that's automatically added but delete other dates
   - Add the word 'Revised' in front of the date so that you can better track your form versions
5. **Save** your new form
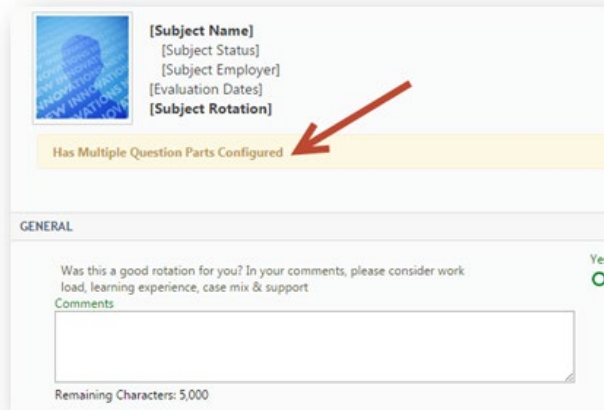
Your copied form has altered content

Follow the next steps carefully. Your new form could be missing something important, or presenting something poorly. Here's how you check it over and make corrections.

Compare & update new form

1. See what content was not supported in your old form:
   a. Navigate to your evaluations forms list

   b. Click the 🔔 on the old form. A new tab opens in your browser

c. Look for yellow boxes describing affected questions

2. Compare your old and new forms. Depending on the type of unsupported content, you may need to add content back into your new form.
Follow these tips per content type:

Completing Evaluations for Others

An administrator (L5 and L6) can complete evaluations for people who cannot complete evaluations in New Innovations. For example, Administrators can enter the results of a patient survey or a faculty member's paper copy evaluation.

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

Complete Evaluations for Others

Filter by Year 2018-2019 ▼   --- ▼   7/1/2018 🗓   6/30/2019 🗓

All | None | Invert | Sessions

▲	All
○	11/01/2018-11/30/2018 Concern Card
▼	11/01/2018-11/30/2018 End of Shift Evaluation (20
	11/01/2018-11/30/2018 Resident Evaluation of the Rotation
	10/01/2018-10/31/2018 Resident Evaluation of the Rotation
	09/01/2018-09/30/2018 Resident Evaluation of the Rotation
	08/01/2018-08/31/2018 End of Shift Evaluation (20
	08/01/2018-08/31/2018 Praise Card (2015-2016)
	08/01/2018-08/31/2018 Resident Evaluation of the Rotation
	07/01/2018-06/30/2019 peer evaluation

6 Selected:

All | None | Invert | Evaluators

▲	All
○	Adams, Betsy Lynn
▼	Andrews, Florence
	Arden, Fred
	Arshid, Balal Mounir
	Bach, Ann
	Benn, Jason
	Browning, Daniela
	Caputo, Eric Matthew
	Cartman, Jerry

45 Selected:

All | None | Invert | Subjects

▲	All
○	Adams, Betsy Lynn
▼	Arden, Fred
	Arshid, Balal Mounir
	Benn, Jason
	Browning, Daniela
	Caputo, Eric Matthew
	Douglas, Amy
	Kharisti, Ali M
	Miller, Christy

18 Selected:

☐ Include Archived Items

View List | Decline Selected Evaluations

All | None | Invert

	Evaluator Name	Rotation/Subject Name	Rotation
☐ Evaluate	Adams, Betsy	EM:AWAY ELECTIVE	EM:AWAY ELECTIVE (Department of Emergency Medicine/Emergency Medicine)
☐ Evaluate	Adams, Betsy	Adams, Betsy Lynn	
☐ Evaluate	Arshid, Balal	DM:IM:WARDS:VA TEAM B	DM:IM:WARDS:VA TEAM B (Department of Medicine/DM-Internal Medicine)
☐ Evaluate	Arshid, Balal	Arshid, Balal Mounir	
☐ Evaluate	** Benn, Jason	Benn, Jason	DM:CARD:CONSULT:VA (Department of Medicine/DM-Cardiology)

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

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Sharing Evaluation Forms with Another Department

1. Find the form to copy
2. In the **Actions** drop-down list beside the form, select **Copy to Department**

3. Check the box of the department where you want the copy
4. Click **Copy**

These items don't copy over
- Milestone narrative or subcompetency questions (custom subcompetencies **do** copy over)
- Milestone subcompetency tags (core competency tags **do** copy over)

These forms can't be copied
- GME forms can't copy to UME departments

- Non-optimized forms can't copy to another department. Any form with a ⚠ has non-optimized content. First, optimize the form, then copy it to another department. Read more about removing non-optimized form content.

Archiving or Deleting Evaluation Forms

You can archive a form to remove it from your list and clean up your workspace. If you don't plan to distribute a form again, you should archive it.

Archived forms continue to function. An archived form:

- Is still distributed by any session
- Can be **un**archived
- Has results that are still available in your reports—just click "include archived"
- Is still available in your forms list—just click "include archived"

Archive a Form

1. Go to Evaluations > Evaluations Forms
2. Click **Archive** from the **Actions** dropdown list

Actions ▾

Edit
Preview

Archive
Delete

Copy to New Form
Copy to Department
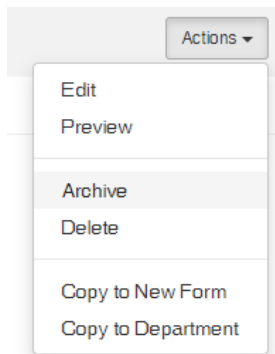
Unarchive a Form

1. Go to Evaluations > Evaluation Forms
2. Check the box Include Archived
3. Find the form you want to unarchive and click on the **Actions** dropdown
4. Click Unarchive

Delete a Form

You can delete a form as long as it has not been used in a session that has completed evaluations.

1. Go to Evaluations > Evaluations Forms
2. Find your form and click **Delete** from the **Actions** dropdown

If the form has been used in a session that has completed evaluations, you will see a red circle with a line through it that prevents you from deleting the form. This is because there are responses attached to the form. If you want to remove it from your list, just Archive it instead.

Requiring Signatures on Evaluations

By default, faculty evaluations of residents require evaluator signatures. All other evaluation types default to no signature requirement. You can change these settings and manage additional signatures by editing your sessions.

You can:

- Select signers by role (Subject, Program Director, Advisor, etc.) or by a specific person's name
- Determine the order in which signatures are collected
- Optionally alert signers via email when an evaluation is ready for them to sign

Can I edit my current session?

Yes, but edited signature options only affect yet-to-be-completed evaluations. Evaluations completed **before** your edit will **not** be affected by your changes.

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Can an evaluation be edited by an evaluator after they sign it?

Yes, and the following happens:
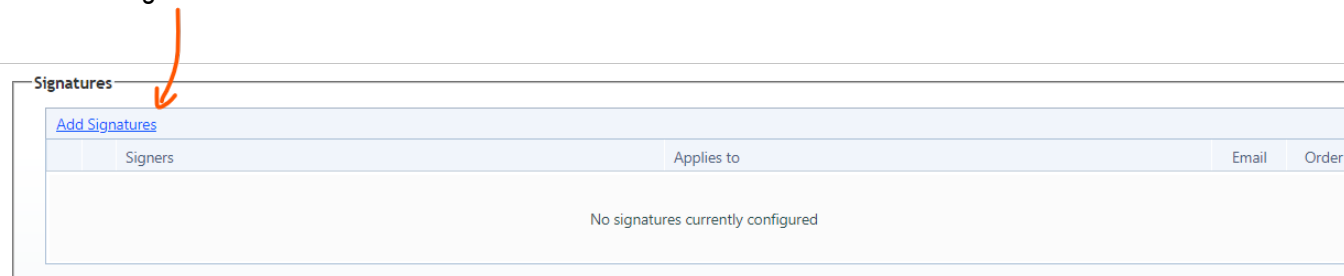
- Evaluator signer is notified that the evaluation needs to be resigned. The evaluation is returned in Draft on the evaluator's home page
- Subject signer is notified that the evaluation needs to be resigned. The evaluation is returned in Draft on the subject's home page

What if we change personnel?
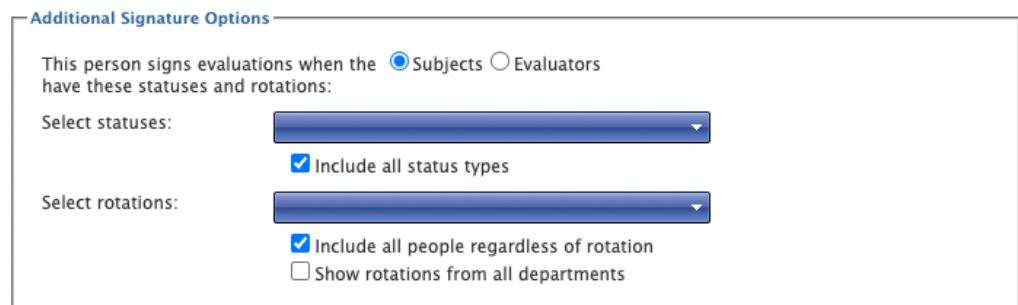
After you update program personnel in Administration, any unsigned evaluations' role-based signatures automatically update to require the new person's signature.

Add signatures in an existing session

1. Go to Evaluations > Session Manager
2. Click the name of a session
3. Click the Evaluation Forms tab
4. Click Add Signatures

5. If you get a popup message, read it and click **OK**
6. Open the **Signer** dropdown. Select a person's name or a [role]:
   - **When choosing a specific person's name:**
     a. If you can't find your person, check **Include all departments** or **Include all work roles** to expand the list outside of the standard choices
     b. Modify **Additional Signature Options** if you want to limit when this person signs an evaluation:

   - You can limit signatures to cases where the subject or evaluator has a certain status and/or is on a certain rotation. Pick **Subjects** or **Evaluators** to set limiting factors for one or the other.
   - Select which subject/evaluator statuses are required to trigger a signature

- o Check **Include all status types** to *not* look for specific status types to trigger an evaluation. Saving this selection overwrites any **Select statuses** dropdown selections.
- o Select which subject/evaluator rotations are required to trigger a signature
  - ✓ Check **Include all people regardless of rotation** to *not* require specific rotations to trigger an evaluation. Saving this selection overwrites any **Select rotations** dropdown selections.
  - ✓ Check **Show rotations from all departments** to see more options in the dropdown
- **When choosing a [Role]:**
  - o Depending on the evaluation type, you may see these roles: [the Evaluator] [the Subject] [Subject's Advisor] [Subject's Program Director] [Evaluator's Program Director] [Evaluator's Advisor]
  - o Roles are determined by information entered elsewhere in New Innovations:
7. Select the **Signature Order**. This sets who signs when among multiple signers
8. Check Send an email when evaluations are ready for signature to alert the signer of their needed signature
9. Click **Save Signature**
   you'll jump back to your session. You should see your session save itself automatically.

Allowing Confidential Evaluation Comments to the Program Director

Confidential Comments allow evaluation participants to leave a note on an evaluation form that can only be accessed by the subject's Program Director. No one other than the PD has access to view the comments, not even other L5 and L6 users.

Requirements for Confidential Comments

- The PD's name must be listed in the program's personnel section in Administration. Go to **Administration** > **Program** > **Personnel** and click the **Admin** tab. Select the PD's name from the drop-down list. Click Save at the bottom of the page. Just giving the PD the status of Program Director is not sufficient.
- The subject of the evaluation must be a **resident or fellow** with a current training record. Confidential comments will not be recorded if the subject is faculty, nurse or any **status other than resident.**

Allow Evaluators' Confidential Comments

To enable confidential comments, enable it in the session:

1. Click Evaluations > Session Manager
2. Open a session
3. Open the Evaluation Form tab
4. Check **Allow confidential comments** in the comments section

5. Optionally make confidential comments generate an email to the PD with or without the comments included
6. **Save** the session
    Now evaluators can leave confidential comments if the Requirements above are met

Allow Subjects' Confidential Comments

The opportunity to leave confidential comments can only be given to subjects who:

- Have resident or fellow status
- Are required to sign an evaluation

1. Follow the steps above to allow evaluators to comment
2. Make the subject a signer

Program Director: Access Confidential Comments

1. A PD can go to Evaluations > View Evaluations
2. Click the Program Director Comments tab

View Program Director Comments

Completed	Program Director Comments

Filter by Year All ▼   📅   📅

All | None | Invert | Sessions   All | None | Invert | Evaluators   All | None | Invert | Subjects

All   All   All
08/01/2011-08/31/2011 NBME - APB evaluation of Resident   Antonucci, Michael   Abrams, Justin

☐ Inclu

1 Selected: 1 Selected: 1 Selected:

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

Question Type Descriptions and Examples

The types of questions you can use to build your evaluation forms include:

- General Questions (in your own words) with various grade scale options
- EPA (Entrustable Professional Activities)
- Milestone Question (ACGME published milestone narrative)
- Subcompetency Question (ACGME published)
- Custom Subcompetency Question

For each type, there is a description, the grade scale options, the distribution methods and how the results can be mapped to the residents' Milestones Reviews providing valuable feedback to your Clinical Competency Committee (CCC). There are also examples of how the question appears on an evaluation form and the type of results it generates in the Evaluation Reports.

General Questions

Description: This is a question that you create in your own words, the kind of custom question you've been using all along.

Grade Scale Options:

- Rating scale
- Multiple Choice - Two options: Select just one answer or select all that apply
- Yes/No
- Number
- Text
- Distribution Method: Evaluations with General questions can be distributed at the end of a rotation or can be made available to evaluators as an on-demand evaluation.
- Milestone Mapping/Tagging: Below are screenshots of General questions using each of the different types of grade scales, plus a sample of the results they generate in the Evaluation Reports.

General Questions with a Rating Grade Scale

Keep rating scales consistent for reporting accuracy. For example, build the scales left to right, lowest score to highest score.

On Evaluation Form

In Evaluation Reports
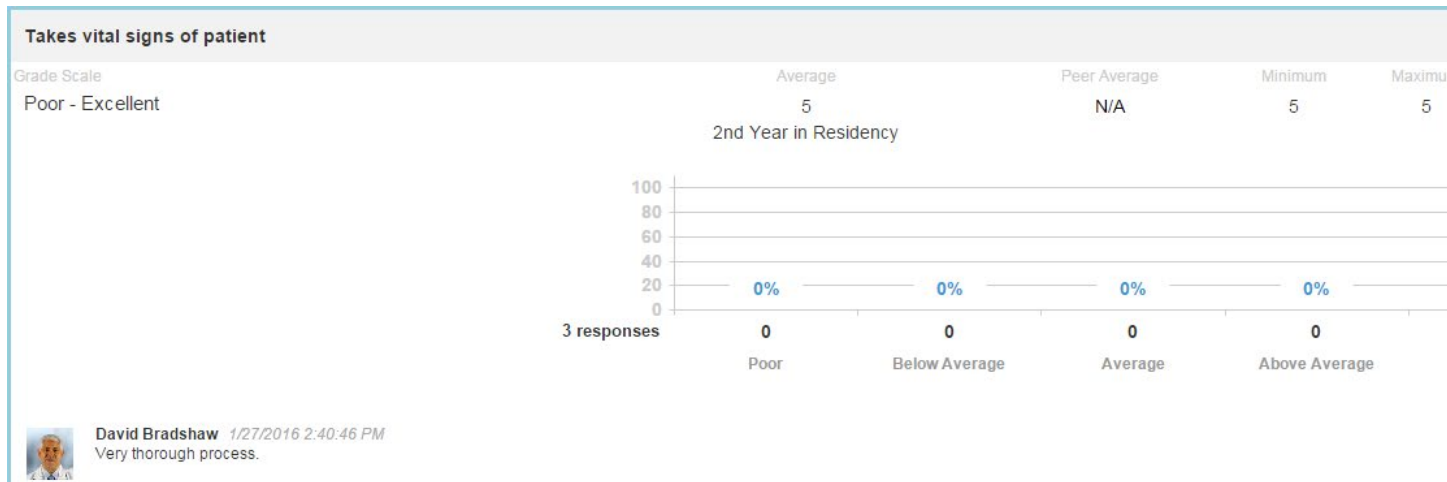
General Question with a Multiple Choice Grade Scale - Select Best Answer:
On the Evaluation Form:

In Evaluation Reports:

Select the resident's best skill. Select only one.

Grade Scale | Most Popular response
Professionalism - Leadership | Medical Knowledge
Show all top choices

Professionalism	0	0%
Clinical Performance	0	0%
Communication	1	14%
Problem-Solving	3	43%
Research	0	0%
Medical Knowledge	3	43%
Leadership	0	0%

7 responses   0   20   40   60

Teresa Spino *1/26/2016 4:14:55 PM*
Very good at finding solutions to equipment problems.
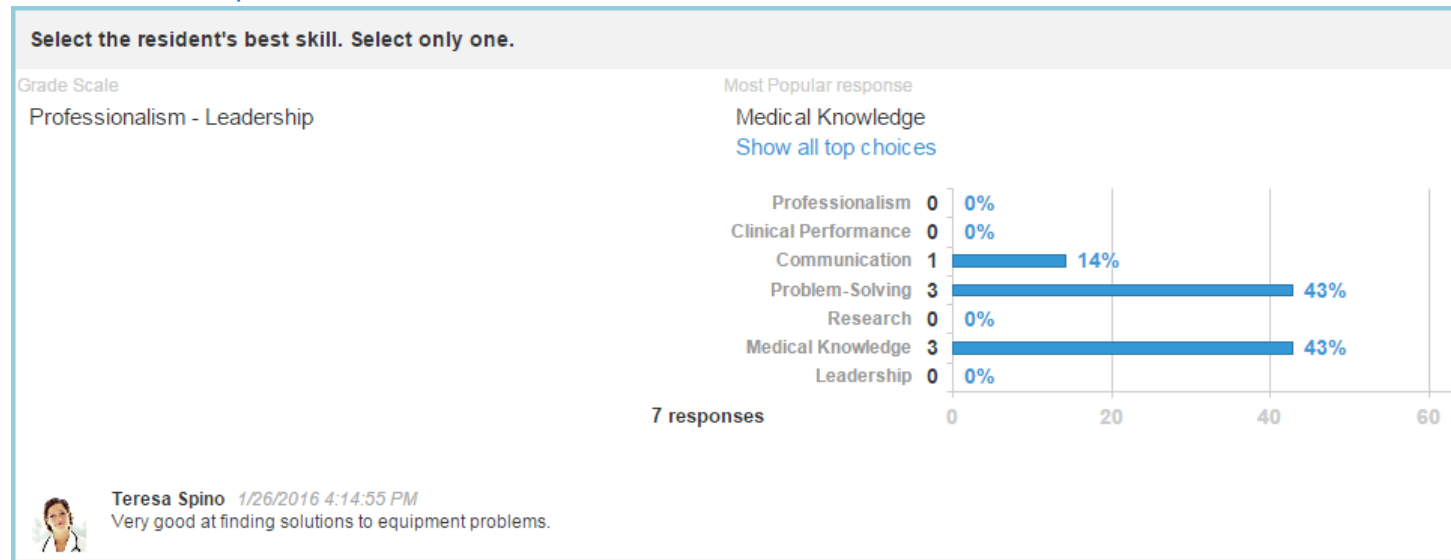
General Question with a Multiple Choice Grade Scale - Select All That Apply:

On the Evaluation Form:

1	**Select the resident's best qualities. Select all that apply.**

☐ Polite

☐ Inclusive

☐ Friendly

☐ Thorough

☐ Sensitive

Comment

In Evaluation Reports:

Select the resident's best qualities. Select all that apply.

Grade Scale | Most Popular response | Pct. Selecte
Polite - Sensitive | Friendly | 100.00%

Friendly	7	100%
Inclusive	6	86%
Sensitive	6	86%
Thorough	6	86%
Polite	3	43%

7 evaluations   0   20   40   60   80   100

Wayne Benson *1/26/2016 4:11:33 PM*
Excellent with patients and their families!

Examples of a General Question with a Yes/No Grade Scale:

On the Evaluation Form:

5	Is the resident progressing as expected?

⊙ Yes

⊙ No

Comment

In Evaluation Reports:

Is the resident progressing as expected?

Grade Scale	Average	Peer Average
Yes/No	1	N/A

2nd Year in Residency

100%

```
100
 80
 60
 40
 20
  0
```

3 responses   3
                     Yes
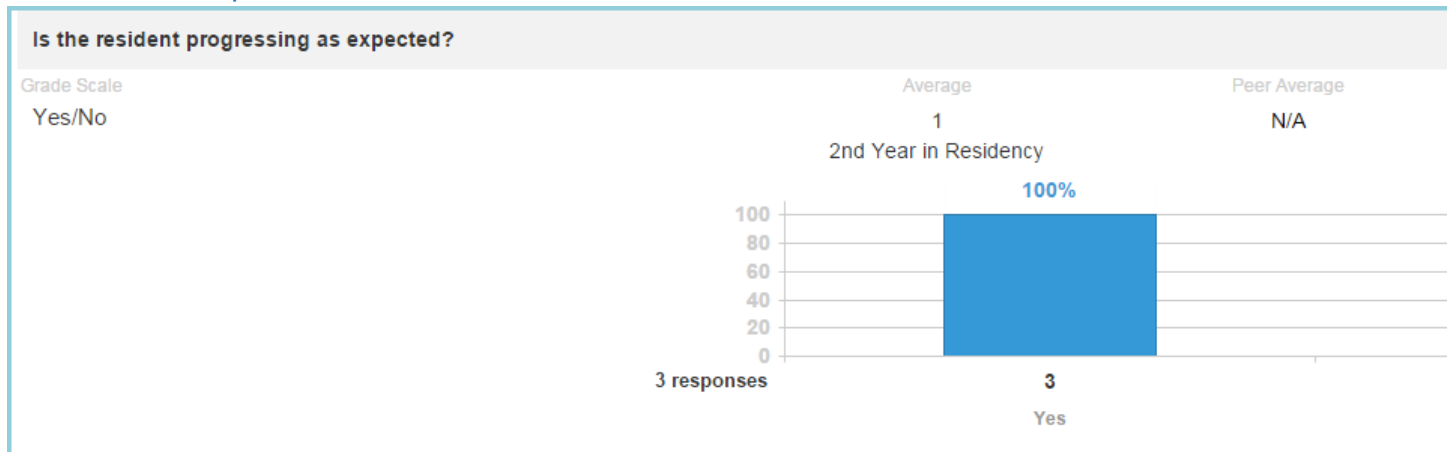
Examples of a General Question with a Number Grade Scale:

On the Evaluation Form:

2*	Enter the number of days you worked with this resident during this rotation.

Range from 1 to 31

Comment

In Evaluation Reports:

Enter the number of days you worked with this resident during this rotation.

Grade Scale	Average
Number Scale	26.71
	(2nd Year in Residency)

Examples of a General Question with a Text Grade Scale:
On Evaluation Form:

In Evaluation Reports:

EPA (Entrustable Professional Activity)

- Description: Entrustable Professional Activities (EPAs) are used to evaluate the observable behaviors unique to your specialty. The EPA typically requires proficiency in numerous procedures or actions that can span several core competencies.
- Grade Scale: An EPA uses a special 'Entrustment Scale' rather than a typical grade scale. The evaluator rates how much they 'trust' the resident to perform the activity. We provide you with a default Entrustment Scale that can be edited. Please note: There is only one Entrustment Scale per department.
- Distribution Method: Evaluations with EPAs can be distributed at the end of a rotation or can be made available to evaluators as an on-demand evaluation.
- Milestone Mapping: Programs can map the responses from their EPAs to either subcompetencies or to individual milestones providing evaluation feedback to your CCC within the resident's Milestone Review.
- Examples of an EPA question:

On Evaluation Form:

3* Conduct a family consultation

The resident is trusted to participate in this activity

Only as an observer	With direct supervision	With indirect supervision	Independently	As an instructor of junior colleagues	Did not observe
1	2	3	4	5	
◯	◯	◯	◯	◯	◯

Comment

In Evaluation Reports:

Conduct a family consultation

Grade Scale	Average	Peer Average	Minimum
Only as an observer - As an instructor of junior col...	3.08	2.95	2

2nd Year in Residency

12 responses

Only as an observer	With direct super...	With indirect sup...
0%	17%	58%
0	2	7
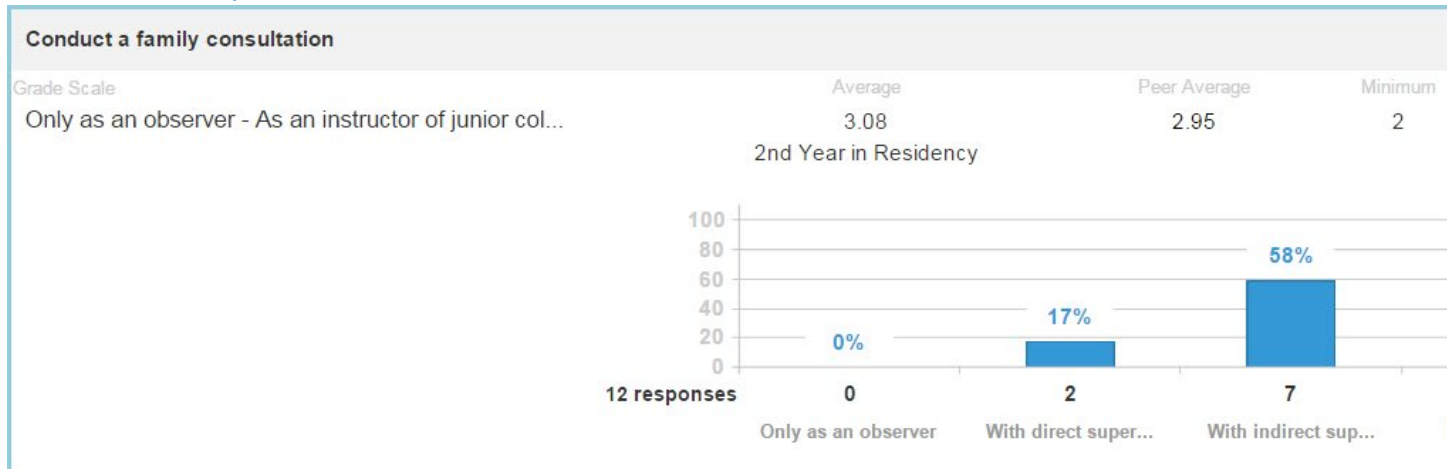
Milestone Question

- Description: Place the ACGME published milestone narratives on your evaluations.
- Grade Scale: The grade scale for milestone questions always includes 'Yes,' 'No' and 'Not Observed.'
- Distribution Method: Milestone questions can be placed on two different types of evaluation forms: The evaluation of a resident at the end of a Rotation and on daily, on-demand Shift Cards.
- Milestone Mapping: Results of any milestone questions are automatically mapped to the corresponding milestones on the resident's Milestone Review providing valuable evaluation feedback to your CCC. No milestone mapping is necessary on your part.
- Examples of a Milestone Question:

On the Evaluation Form:

4*	Consistently recognizes common situations that require urgent or emergent medical care
	○ Yes
	○ No
	○ Not Observed
	Comment

In Evaluation Reports:

Consistently recognizes common situations that require urgent or emergent medical care

Grade Scale	Average	Peer Average	Minimum	Max
Yes/No	0.92	0.9		

2nd Year in Residency
12 Responses: 11 Yes

0%   20%   40%   60%
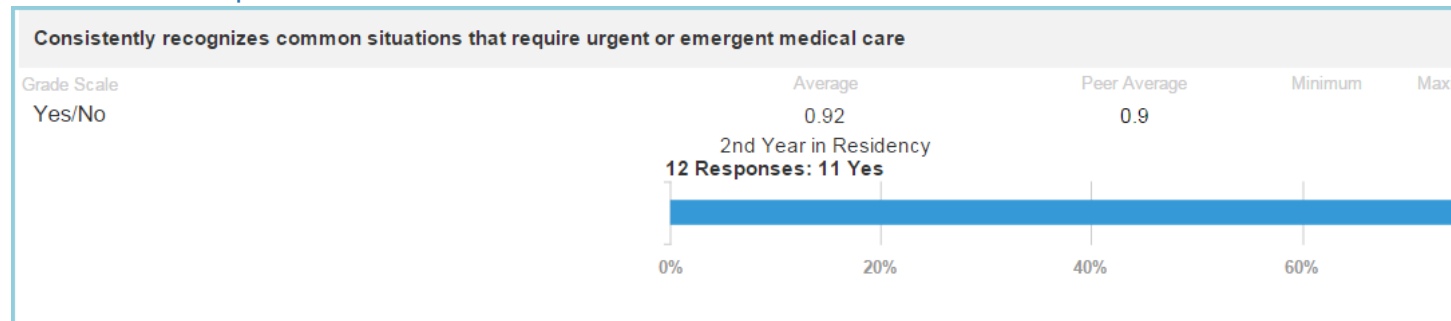
Subcompetency Question

- Description: Evaluate your residents by placing the ACGME published subcompetencies directly on your evaluation forms. This can be done in two ways.
- Manually-Added: Place specific subcompetencies on your evaluation form. The resident is evaluated on that subcompetency regardless of the resident's rotation.
- Rotation-Based: Designate the subcompetencies that should appear on the resident's evaluation based on their rotation. Allow the system to dynamically place the correct subcompetencies you have designated on the form, for the resident's rotation.
- Grade Scale: The grade scale mimics the grade scale used on a milestone subcompetency for your subspecialty.
- Distribution Method: Evaluations with subcompetencies can be distributed at the end of a rotation or can be made available to evaluators as an on-demand evaluation.
- Milestone Mapping: Results from subcompetency questions will be automatically linked to the subcompetencies on the resident's Milestone Review providing evaluation feedback to your CCC. No milestone mapping is necessary on your part.
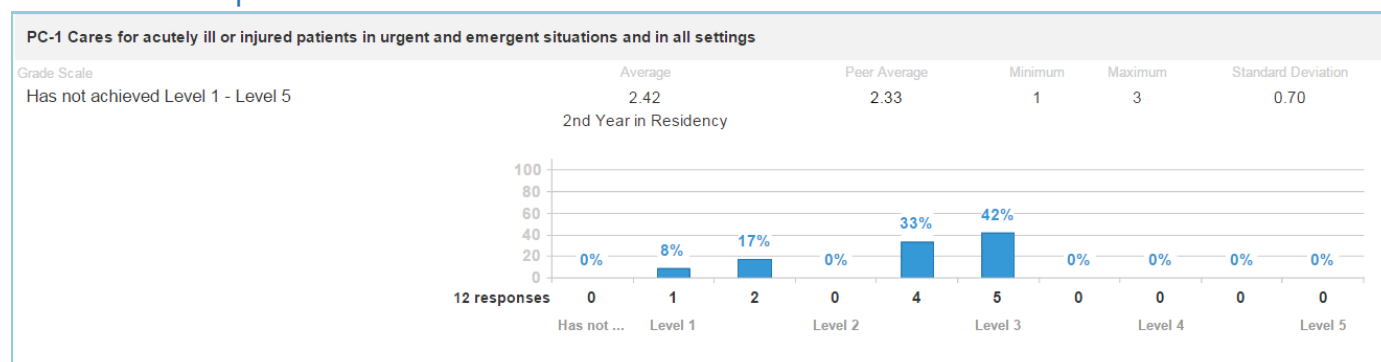- Examples of a Subcompetency Question:

On the Evaluation Form:

5* **PC-1 Cares for acutely ill or injured patients in urgent and emergent situations and in all settings** *Family physicians provide accessible, quality, comprehensive, compassionate, continuous, and coordinated care to patients in the context of family and community, not limited by age, gender, disease process, or clinical setting, and by using the biopsychosocial perspective and patient-centered model of care*

Has not achieved Level 1	Level 1	Level 2	Level 3	Level 4	Level 5
	Gathers essential information about the patient (history, exam, diagnostic testing, psychosocial context)	Consistently recognizes common situations that require urgent or emergent medical care	Consistently recognizes complex situations requiring urgent or emergent medical care	Coordinates care of acutely ill patient with consultants and community services	Provides and coordinates care for acutely ill patients within local and regional systems of care
	Generates differential diagnoses	Stabilizes the acutely ill patient utilizing appropriate clinical protocols and guidelines	Appropriately prioritizes the response to the acutely ill patient	Demonstrates awareness of personal limitations regarding procedures, knowledge, and experience in the care of acutely ill patients	
	Recognizes role of clinical protocols and guidelines in acute situations	Generates appropriate differential diagnoses for any presenting complaint	Develops appropriate diagnostic and therapeutic management plans for less common acute conditions		
		Develops appropriate diagnostic and therapeutic management plans for acute conditions	Addresses the psychosocial implications of acute illness on patients and families		
			Arranges appropriate transitions of care		

In Evaluation Reports:

PC-1 Cares for acutely ill or injured patients in urgent and emergent situations and in all settings

Grade Scale	Average	Peer Average	Minimum	Maximum	Standard Deviation
Has not achieved Level 1 - Level 5	2.42	2.33	1	3	0.70

2nd Year in Residency

12 responses	0	1	2	0	4	5	0	0	0	0
	Has not ...	Level 1		Level 2		Level 3		Level 4		Level 5
	0%	8%	17%	0%	33%	42%	0%	0%	0%	0%

Custom Subcompetency Question

- Description: We provide an empty template that allows you to enter your own text for the subcompetencies and milestones. Change the headings of the five levels and adjust the grade scale to meet your program's needs. Use this type of question for your curricular milestones, to edit the published ACGME milestones or to create your own subcompetency-style questions.
- Grade Scale: Edit the grade scale to mimic the grade scale used on subcompetencies in your subspecialty.
- Distribution Method: Evaluations with Custom Subcompetencies can be distributed at the end of a rotation or can be made available to evaluators as an on-demand evaluation.
- Milestone Mapping: Your custom subcompetency questions can be mapped to the ACGME published subcompetencies to provide evaluation feedback to your CCC within the resident's Milestone Review.
- Examples of a Custom Subcompetency Question:

On the Evaluation Form:

5* Sample Custom Subcompetency

Level 1	Level 2	Level 3	Level 4	Level 5
Milestone 1	Milestone 3			
Milestone				

○   ○   ○   ○   ○   ○   ○   ○   ○

○ Not applicable

Comment

In Evaluation Reports:

Gathers essential and accurate information about the patient.

Grade Scale		Average	Peer Average	Minimum	Maximum
Level 1 - Level 5		2.5	2.5	1.5	3

2nd Year in Residency

12 responses

	0	2	1	4	5	0	0
	0%	17%	8%	33%	42%	0%	0%
	Level 1		Level 2		Level 3		Level 4

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