

New Innovations (RMS) Evaluations – Managing Distributions Training



2023











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Evaluation Status Icons

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

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

Adding Manual Matches to Evaluations

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

When to use Manual Matches:

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

How to spot a Manual Match:

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

Faculty Evaluation of Resident

Interval 8

15 matches

n/a

Available Date: 2/19/2016

2/1/2016 - 2/28/2016

All

Completed

Pending

On Hold

Pending Signatures

Declined

Unmatched People

View

Hide evaluator info

Actions

Evaluator

Subject

Evaluator Status

Subject Status

Rotation

St

Bach, Ann

Wallace, Charles

Faculty

PRG 3

EM:EM

2/

Beres, Amanda

Baker, Thomas Eugene

Program Director

PRG 3

FM:ComMed-SC

2/

Black, James

Julka, Vijay

Faculty

PRG 2

FM:SportsMed-SC

2/

Add Manual Matches

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

Faculty Evaluation of Resident

Evaluation of a Person Email Notifications enabled

People Rotations Evaluation Form Settings Match Schedule

Automatic Matching
☐ Enable Automatic Matching - the system will automatically create matches with personnel on the department block schedule for each interval.

End of Session Settings
☒ Auto Copy when this session ends [Edit](#) ☐ Send an email reminder when the session is copied to

Add New Interval
 View Edit More

<input type="checkbox"/>	Interval Name		Match	Available	Start/End
<input type="checkbox"/>	Interval 1	24 matches	n/a	7/24/2015	7/1/2015 - 7/
<input type="checkbox"/>	Interval 2	22 matches	n/a	8/24/2015	8/1/2015 - 8/

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

<input type="checkbox"/> Interval 1	<input type="checkbox"/> Interval 5	<input type="checkbox"/> Interval 8	<input type="checkbox"/> Interval 11
<input type="checkbox"/> Interval 2	<input type="checkbox"/> Interval 6	<input type="checkbox"/> Interval 9	<input type="checkbox"/> Interval 12
<input type="checkbox"/> Interval 3	<input type="checkbox"/> Interval 7	<input type="checkbox"/> Interval 10	<input type="checkbox"/> Interval 1
<input type="checkbox"/> Interval 4			
8. Check the email notification box to send an alert to evaluators
You'll only see this option if the interval is in the past
9. Click **Preview** to view the matches and make edits, as needed. Click Save.
10. Click **Create Matches** to create the matches and go back to the match page

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

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

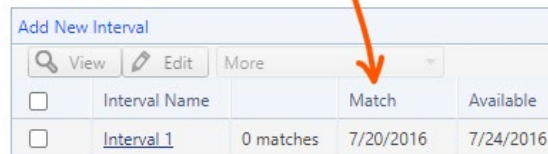
Prompt Automatic Matches in Past Intervals

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

For more information about conference set up go to [Help>Tutorial Videos>Evaluations \[8.12 Evaluations-Matching\]](#)

Creating Matches on Past Intervals

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



The screenshot shows a table titled "Add New Interval". It has columns: "Interval Name", "Match", and "Available". The first row shows "Interval 1" with "0 matches" and dates "7/20/2016" and "7/24/2016". An orange arrow points to the "Match" column header.

Interval Name	Match	Available
Interval 1	0 matches	7/20/2016 7/24/2016

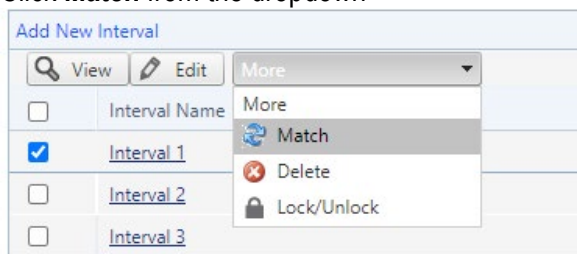
If you want matches (evaluations) for intervals with past match dates, you can rematch select intervals.

Risks

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

How-to

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



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

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

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

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

7

Editing an Evaluator's Completed Evaluation

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

Make Edits for Evaluator

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

View Completed Evaluations

Completed

Delinquent

Declined

On Hold

Pending Signatures

High/Low Scores

Eval Status List

Program Director Comments

[Personal Listing](#)
Filter by Year

2015-2016

7/1/2015

6/30/2016

All | None | Invert | Sessions

07/01/2015-07/31/2015 Faculty Eval of Res - Custom Subs & Comment Box GS

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

07/01/2015-07/31/2015 Nurse Evaluation of Resident

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

07/01/2015-07/31/2015 Resident Evaluation of Rotation

08/01/2015-08/31/2015 Faculty Eval of Res - Custom Subs & Comment Box GS

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

08/01/2015-08/31/2015 Nurse Evaluation of Resident

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

1 Selected:

All | None | Invert | Evaluators

Aktar, Aboud

Andrews, Florence

Antonucci, Michael

Archer, David A

Baker, Thomas Eugene

Beres, Amanda

Black, James

Gomez, Maria

Jones, Robert

1 Selected:

All | None | Invert | Subjects

Aktar, Aboud

Andrews, Florence

Antonucci, Michael

Archer, David A

Bach, Ann

Baker, Thomas Eugene

Beres, Amanda

Blind, Harold

Cirelli, Samantha

1 Selected:

☐ Include Archived Items

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

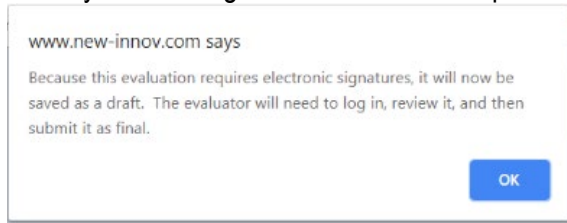
☒ Hide identifying information in the header of the anonymous evaluations

Residency Evaluations

All | None | Invert

Evaluator Name	Rotation/Subject Name	Rotation	Session Name	Start Date	Stop Date	Session
<input type="checkbox"/> * Black, James	Archer, David A	FM:SportsMed-SC (Department of Family Medicine/FM-Family Medicine)	Faculty Evaluation of Resident (FM-Family Medicine)	7/1/2015	7/31/2015	8/3/20
<input type="checkbox"/> * Matthews, Kathy	O'Doull, Kathleen	FM:MedA-SC (Department of Family Medicine/FM-Family Medicine)	Faculty Evaluation of Resident (FM-Family Medicine)	7/1/2015	7/31/2015	8/3/20
<input type="checkbox"/> * Matthews, Kathy	Julka, Vijay	FM:ComMed-SC (Department of Family Medicine/FM-Family Medicine)	Faculty Evaluation of Resident (FM-Family Medicine)	7/1/2015	7/31/2015	8/3/20

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



If the evaluator was a signer:

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

If the subject was a signer:

- They will get a home page notification

Sending a Declined Evaluation Back to the Evaluator

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

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

Viewing Evaluation Match & Automated Email History

Open Match History

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

Faculty Evaluation of Resident

Interval 79 matchesn/aAvailable Date: 1/24/20161/1/2016 - 1/31/2016

Last m

AllDelinquentCompletedOn HoldPending SignaturesDeclinedUnmatched People

View

☐ Hide evaluator info

Actions

<input type="checkbox"/>		Evaluator	Subject	Evaluator Status	Subject Status	Rotation	Start
<input type="checkbox"/>		Antonucci, Michael	Parke, Brenda	Faculty	PRG 2	FM:FPC2-PCMH	1/1/2016
<input type="checkbox"/>		Antonucci, Michael	Wolf, Becky	Faculty	PRG 1	FM:FPC2-PCMH	1/1/2016
<input type="checkbox"/>		Beres, Amanda	Gomez, Maria	Program Director	PRG 3	FM:AmbGyn-SC	1/1/2016
<input type="checkbox"/>		Beres, Amanda	O'Doull, Kathleen	Program Director	PRG 2	FM:ComMed-SC	1/1/2016

History Tab

You'll see:

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

Match History

History
Automated Email history

Print History:

Viewed/Printed By:	Date:	Printed:
No records to display.		

Signature History:

Signed by:	Date:	Role:
No records to display.		

Delinquent Reminders Sent:

No records to display.

Edit Match History:

Created	7/15/2015 11:32:23 AM
---------	-----------------------

Automated Email History Tab

Here, you'll find emails that were:

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

Match History				
History	Automated Email history			
Email history for evaluator: (All notifications sent to the evaluator concerning matches in this interval)				
	Sent on	Mailed to:	Subject of Message:	Text (first 50 char's)
Show Full Message	1/25/2016 6:51:54 AM	DemoMail@New-Innov.com	Evaluations	Michael Antonucci, you h evaluations to complete. Evaluation of Resident 01/01/2016-01/31/2016 2/3/2016 Institution Logi GMEC Department: FM-F Medicine Questions? Plea

Printing a Pending Evaluation

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

Print a Pending Evaluation

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

Antonucci, Michael		Faculty		18	5	3	View Block		
All Completed Delinquent Pending									
<div><div><div><div><div><div></div><div>View</div></div></div><div><div>Hide evaluator info</div><div>Actions</div></div></div></div></div>									
<input type="checkbox"/>	Subject			Status	Rotation	Session	Start	End	Availab
<input checked="" type="checkbox"/>			Archer, David A	PRG 1	FM:SportsMed-SC	Faculty Evaluation of Resident	12/1/2015	12/31/2015	12/24/2
<input type="checkbox"/>			Archer, David A	PRG 1	FM:FPC2-PCMH	Faculty Evaluation of Resident	12/1/2015	12/31/2015	12/24/2
<input type="checkbox"/>			Aktar, Aboud	PRG 2	FM:FPC2-PCMH	Faculty Evaluation of Resident	12/1/2015	12/31/2015	12/24/2
<input type="checkbox"/>			Baker, Thomas Eugene	PRG 3	FM:SportsMed-SC	Faculty Evaluation of Resident	12/1/2015	12/31/2015	12/24/2
<input type="checkbox"/>			Parke, Brenda	PRG 2	FM:Elect	Faculty Evaluation of Resident	12/1/2015	12/31/2015	12/24/2
Evaluations per page 50									

Sending Completed Evaluations Back to Evaluators for Editing

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

Return a Completed Evaluation

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

► Admin Change Log (1)

Signatures

Orlando Brown

Jacob Morris

pending...

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

Releasing Evaluations from 'On Hold'

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

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

On Hold Evaluations

Completed Delinquent Declined **On Hold** Pending Signatures High/Low Scores Eval Status List Program Director Comments

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

All | None | Invert | Sessions
All
10/01/2015-10/31/2015 Faculty Evaluation of Resident
1 Selected:

All | None | Invert | Evaluators
All
Beres, Amanda
1 Selected:

All | None | Invert | Subjects
All
Aktar, Aboud
1 Selected:

☐ Include Archived Items

Attention! When viewing/printing evaluations, no more than 50 items may be selected at one time.
[View List](#)
[View On Hold Evaluations](#) | [Release Selected Evaluations](#)

All | None | Invert

Evaluator Name	Rotation/Subject Name	Rotation	Session Name	Start
<input checked="" type="checkbox"/> Beres, Amanda	Aktar, Aboud	FM:ComMed-SC (Department of Family Medicine/FM-Family Medicine)	Faculty Evaluation of Resident (FM-Family Medicine)	10/1/2015

When you release an evaluation:

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

Troubleshooting Matches

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

Check the Block Schedule

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

Check the Session

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

Rematch your Session

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

To rematch a single interval:

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

To rematch more than one interval:

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

Beware of Creating Duplicate Matches

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

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

Viewing Completed Evaluations

Who can view completed evaluations?

Level 6 - view in all departments

Level 5- view in department where privileged

Level 4 - view only evaluations that are not on hold or anonymous

Level 3-1 - view only evaluations done on them or they have completed

View Completed Evaluations

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

7. Click List All Evaluations

View Completed Evaluations

Completed Delinquent NET On Hold Pending Signatures High/Low Scores Eval Status List Program Director Comments

Personal Listing

Filter by Year: 2013 - 2014 --- 7/1/2013 6/30/2014

All | None | Invert | Sessions

All | None | Invert | Evaluators

All | None | Invert | Subjects

07/01/2013-07/31/2013 Faculty Evaluation of Resident
07/01/2013-07/31/2013 Milestones
07/01/2013-07/31/2013 Resident Evaluation of Faculty
07/01/2013-07/31/2013 Resident Evaluation of Rotation
08/01/2013-08/31/2013 Faculty Evaluation of Resident
09/01/2013-09/30/2013 Faculty Evaluation of Resident
10/01/2013-10/31/2013 Faculty Evaluation of Resident

Benson, Wayne A
Brooks, Maggie
Durbin, Nancy Lee
Imdorf, Nancy Lynne
Jones, Anna
Tirrell, Robin Lynne

Benson, Wayne A
Brooks, Maggie
Gomez, Maria
Lemon, Julie
Parke, Brenda

1 Selected: 1 Selected: 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
[Print selected evaluations to PDF](#) ☐ Set as the "Printed" date
[Return selected evals to 'On Hold'](#) ☐ Include Category Summary
☐ 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	Session Name	Start Date	Stop Date	Session Due Date	
<input checked="" type="checkbox"/> Benson, Wayne Previously Viewed	Brooks, Maggie	JIM:WARD - 1-MH (UGB Internal Medicine)	Milestones (UGB Internal Medicine)	7/1/2013	7/31/2013	8/3/2013	Edit Evaluation
<input checked="" type="checkbox"/> Benson, Wayne Signature Missing	Brooks, Maggie	JIM:AMB-MH (UGB Internal Medicine)	Faculty Evaluation of Resident (UGB Internal Medicine)	8/1/2013	8/31/2013	9/3/2013	Edit Evaluation
<input checked="" type="checkbox"/> Benson, Wayne	Brooks, Maggie	JIM:WARD - 1-MH (UGB Internal Medicine)	Faculty Evaluation of Resident (UGB Internal Medicine)	7/1/2013	7/31/2013	8/3/2013	Edit Evaluation
<input checked="" type="checkbox"/> Brooks, Maggie	JIM:WARD - 1-MH	JIM:WARD - 1-MH (UGB Internal Medicine)	Resident Evaluation of Rotation (UGB Internal Medicine)	7/1/2013	7/31/2013	8/3/2013	Edit Evaluation
<input checked="" type="checkbox"/> Brooks, Maggie Previously Viewed	Benson, Wayne A	JIM:WARD - 1-MH (UGB Internal Medicine)	Resident Evaluation of Faculty (UGB Internal Medicine)	7/1/2013	7/31/2013	8/3/2013	Edit Evaluation
<input checked="" type="checkbox"/> Durbin, Nancy	Brooks, Maggie	JIM:WARD - 2-MH (UGB Internal Medicine)	Faculty Evaluation of Resident (UGB Internal Medicine)	9/1/2013	9/30/2013	10/3/2013	Edit Evaluation

8. In the last column, click Edit Evaluation to make changes to the completed evaluation You'll see:

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

Viewing Declined Evaluations

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

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

Declined Evaluations

Completed Delinquent Declined On Hold Pending Signatures High/Low Scores Eval Status List Program Director Comments

Filter by Year: 2018-2019 7/1/2018 6/30/2019

All | None | Invert Sessions
01/01/2019-01/31/2019 Session For Shift Cards
1 Selected

All | None | Invert Evaluators
LBNeuroFaculty, Two
1 Selected

All | None | Invert Subjects
LBNeuroResident, One
LBNeuroResident, Two
1 Selected

☐ Include Archived Items

Attention! When viewing/printing evaluations, no more than 50 items may be selected at one time.
[View List](#)
[View Declined Evaluations](#) | [Return Evaluations](#)

All | None | Invert

Evaluator Name	Rotation/Subject Name	Rotation	Session Name	Start Date	Stop Date	Session Due Date	Reason Declined
<input type="checkbox"/> LBNeuroFaculty, Two	LBNeuroResident, One	LB Neuro One (LB Neurological Surgery)	Session For Shift Cards (LB Neurological Surgery)	1/8/2019	1/8/2019	2/3/2019	I did not work with this person
<input type="checkbox"/> LBNeuroFaculty, Two	LBNeuroResident, One	LB Neuro One (LB Neurological Surgery)	Session For Shift Cards (LB Neurological Surgery)	1/8/2019	1/8/2019	2/3/2019	I did not work with this person
<input type="checkbox"/> LBNeuroFaculty, Two	LBNeuroResident, Two	LB Neuro One (LB Neurological Surgery)	Session For Shift Cards (LB Neurological Surgery)	1/8/2019	1/8/2019	2/3/2019	I did not work with this person
<input type="checkbox"/> LBNeuroFaculty, Two	LBNeuroResident, One	LB Neuro One (LB Neurological Surgery)	Session For Shift Cards (LB Neurological Surgery)	1/8/2019	1/8/2019	2/3/2019	I did not spend enough time with this person

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

Viewing Delinquent Evaluations

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

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

Delinquent Evaluations

Completed

Delinquent

Declined

On Hold

Pending Signatures

High/Low Scores

Eval Status List

Program Director Comments

Filter by Year

2017-2018

7/1/2017

6/30/2018

[All](#) | [None](#) | [Invert](#) | Sessions

All

07/01/2017-07/31/2017 Concern Card (2016-2017)

07/01/2017-07/31/2017 End of Shift Evaluation (2016-17)

07/01/2017-07/31/2017 Faculty Evaluation of Resident

07/01/2017-07/31/2017 Faculty Evaluation of Resident (2017-2018)

07/01/2017-07/31/2017 Faculty of Resident-Competency Based

07/01/2017-07/31/2017 Resident Evaluation of Faculty

07/01/2017-07/31/2017 Resident Evaluation of Faculty (2016-17)

07/01/2017-07/31/2017 Resident Evaluation of Rotation

07/01/2017-07/31/2017 Resident Evaluation of the Rotation

1 Selected:

[All](#) | [None](#) | [Invert](#) | Evaluators

All

Adams, Betsy Lynn

Agarwal, Needha

Andrews, Florence

Arden, Fred

Arshid, Balal Mounir

Atkins, Chet

Bach, Ann

Barata, Dawn

Bender, Douglas

1 Selected:

[All](#) | [None](#) | [Invert](#) | Subjects

All

Adams, Betsy Lynn

Agarwal, Needha

Andrews, Florence

Arden, Fred

Arshid, Balal Mounir

Atkins, Chet

Bach, Ann

Barata, Dawn

Benn, Jason

1 Selected:

☐ Include Archived Items

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

[View List](#)
[View Delinquent Evaluations](#) | [Send Delinquent Email](#)

[All](#) | [None](#) | [Invert](#)

Evaluator Name	Rotation/Subject Name	Rotation	Session Name
<input type="checkbox"/> Cartman, Jerry	Agarwal, Needha	EM:PEDS:EMC (Department of Emergency Medicine/Emergency Medicine)	End of Shift Evaluation (2016-17) (E
<input type="checkbox"/> ** Cartman, Jerry	Benn, Jason	EM:EM:Red (Department of Emergency Medicine/Emergency Medicine)	End of Shift Evaluation (2016-17) (E
<input type="checkbox"/> Cartman, Jerry	Benn, Jason	EM:EM:Red (Department of Emergency Medicine/Emergency Medicine)	End of Shift Evaluation (2016-17) (E

Count: 3
[View Delinquent Evaluations](#) | [Send Delinquent Email](#)

Notes:

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

Viewing High/Low Scores

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

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

High/Low Scores

Completed Delinquent NET On Hold Pending Signatures **High/Low Scores** Eval Status List Program Director Comments

Filter Report

Dates & Scores

Academic Year: 2012-2013 ☒ Include Low Scores
Interval: July ☒ Include High Scores
☐ Include Archived Sessions

Sessions, Evaluators & Subjects

All | None | Invert | Sessions
07/01/2012-07/31/2012 2012 - 2013 Faculty Evaluation of Resident
07/01/2012-07/31/2012 2012-2013 Resident Evaluation of Rotation
1 Selected:

All | None | Invert | Evaluators
Atkins, Chet
Benn, Jason Michael
Kurinski, Daniel
Wells, Ronald
Wolf, Becky
1 Selected:

All | None | Invert | Subjects
Benn, Jason Michael
Wells, Ronald
1 Selected:

View List

High/Low Scores Report: 7/1/2012 to 7/31/2012 • Low Scores • High Scores

View Evaluations | Print Evaluations to PDF

Drag a column header and drop it here to group by that column

<input type="checkbox"/>	Evaluator	Subject	Rotation	Session	Start	Stop	Due	Submitted
<input type="checkbox"/>	Atkins, Chet	Wells, Ronald		2012 - 2013 Faculty Evaluation of Resident (Emergency Medicine)	7/1/2012	7/31/2012	8/3/2012	4/1/2013
<input type="checkbox"/>	Benn, Jason	EM:BURN	EM:BURN (Emergency Medicine)	2012-2013 Resident Evaluation of Rotation (Emergency Medicine)	7/1/2012	7/31/2012	8/3/2012	8/21/2012
<input type="checkbox"/>	Kurinski, Daniel	EM:BURN	EM:BURN (Emergency Medicine)	2012-2013 Resident Evaluation of Rotation (Emergency Medicine)	7/1/2012	7/31/2012	8/3/2012	8/21/2012

Notes:

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

Viewing 'On Hold' Evaluations

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

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

On Hold Evaluations

Completed Delinquent Declined **On Hold** Pending Signatures High/Low Scores Eval Status List Program Director Comments

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

[All](#) | [None](#) | [Invert](#) | Sessions

▲ **All**
○ 10/01/2015-10/31/2015 Faculty Evaluation of Resident
▼

[All](#) | [None](#) | [Invert](#) | Evaluators

▲ **All**
○ Beres, Amanda
▼

[All](#) | [None](#) | [Invert](#) | Subjects

▲ **All**
○ Aktar, Aboud
▼

☐ Include Archived Items

1 Selected: 1 Selected: 1 Selected:

Attention! When viewing/printing evaluations, no more than 50 items may be selected at one time.
[View List](#)
[View On Hold Evaluations](#) | [Release Selected Evaluations](#)

[All](#) | [None](#) | [Invert](#)

Evaluator Name	Rotation/Subject Name	Rotation	Session Name
<input type="checkbox"/> Beres, Amanda	Aktar, Aboud	FM:ComMed-SC (Department of Family Medicine/FM-Family Medicine)	Faculty Evaluation of Resident (FM-Family Medicine)

Count: 1

Notes:

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

Viewing Evaluations with Pending Signatures

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

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

Pending Signatures

Completed Delinquent NET On Hold Pending Signatures High/Low Scores Eval Status List Program Director Comments

Filter by Year 2013 - 2014 --- 7/1/2013 6/30/2014

All | None | Invert | Sessions

All | None | Invert | Subjects

All | None | Invert | Missing Signatures

07/01/2013-07/31/2013 Faculty Evaluation of Resident
08/01/2013-08/31/2013 Faculty Evaluation of Resident
09/01/2013-09/30/2013 Faculty Evaluation of Resident
10/01/2013-10/31/2013 Faculty Evaluation of Resident

Brooks, Maggie
Gomez, Maria
Lemon, Julie
Parke, Brenda

Benson, Wayne A
Brooks, Maggie
Gomez, Maria
Lemon, Julie
Parke, Brenda

1 Selected: 1 Selected: 1 Selected:

Attention! When viewing/printing evaluations, no more than 50 items may be selected at one time.
[View List](#)
[View Selected Evaluations](#) | [Email Missing Signature People](#)

All | None | Invert

Missing Signature	Rotation/Subject Name	Rotation	Session Name	Start Date	Stop Date	Session Due Date
<input checked="" type="checkbox"/> Brooks, Maggie	Brooks, Maggie	JIM:AMB-MH (JGB Internal Medicine)	Faculty Evaluation of Resident (JGB Internal Medicine)	8/1/2013	8/31/2013	9/3/2013
<input type="checkbox"/> Benson, Wayne	Benson, Wayne	JIM:AMB-MH (JGB Internal Medicine)	Faculty Evaluation of Resident (JGB Internal Medicine)	9/1/2013	9/30/2013	10/3/2013

To send an email to a person:

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

Viewing Comments to the Program Director

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

Program directors:

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

View Program Director Comments

Completed | Program Director Comments

Filter by Year: 2013 - 2014 | --- | 7/1/2013 | 6/30/2014

All | None | Invert | Sessions

All | None | Invert | Evaluators

All | None | Invert | Subjects

Include Archived Items

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

[View List](#)

[View Selected Evaluations](#) | [View Comments Only](#)

Evaluator Name	Rotation/Subject Name	Rotation	Session Name	Start Date	Stop Date	Session Due Date
<input checked="" type="checkbox"/> Buchanan, Jeff	Gomez, Maria	DM-ENDO-CONSULTS (Department of Medicine/DM-Endocrinology)	Faculty Evaluation of Resident (JGB Internal Medicine)	9/1/2013	9/30/2013	10/3/2013
<input checked="" type="checkbox"/> Durbin, Nancy	Gomez, Maria	ANES:ANES (Anesthesiology)	Faculty Evaluation of Resident (JGB Internal Medicine)	10/1/2013	10/31/2013	11/3/2013

Notes:

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