

# New Innovations (RMS) Evaluations Reports Training



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## Intro to Evaluation Reports

Evaluation reports can help you judge the quality of your program and the competency and compliance of your people.

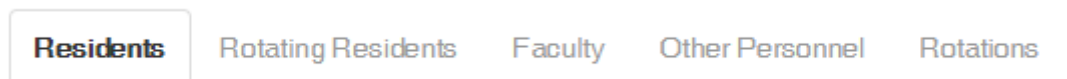
### Report on:

You can run evaluation-related reports on five entities:

- Residents
- Rotating Residents
- Faculty
- Other Personnel
- Rotations

### Switch entities

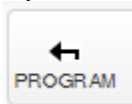
You can move from one entity to another by clicking the tabs



### ***Program- & individual-level views per entity***

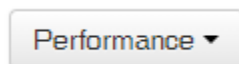
Each entity has a program-level view and an individual-level view

- If you click an individual, you drill down to the individual-level view
- If you click the **Program** button, you move back to the program-level view:

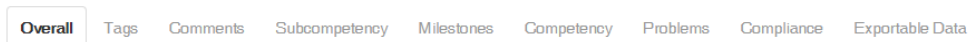


### Changing reports

- From the program-level view, you can change the report you're seeing with this dropdown:



- From the individual-level view, you can change the report you're seeing by clicking a different tab:



### Access to Evaluation Reports

Level 6 - Can view evaluation results from all departments for all personnel

Level 5 - Can view all evaluation results for the program they have privileges in

Level 4 - Can view all results except anonymous evaluations in any department where privileged

Level 3 - Can see their own results, if permitted within Session on the Settings tab

Level 2 - Can view their own results, if permitted within Session on the Settings tab

Level 1 - Can view their own results, if permitted within Session on the Settings tab

Advisors - Can see the evaluation results of their Advisees, if:

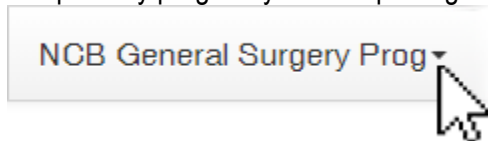
- Advisor is indicated in resident's Personnel record
- Advisor is permitted to see results based on the setting in the Settings tab in Session

## Navigate

1. Go to Evaluations > Reports
2. You land:
  - At the program-level view
  - In the Residents tab
  - In the Performance report
3. You can navigate to:
  - Another view-level  
*Click a learner*
  - Another entity  
*Click another tab*
  - Another report  
*Click the report dropdown*

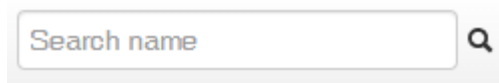
## Program Selection

Jump to any program you have privileges in by clicking the arrow and clicking a program in the dropdown.



## Person Search

Type a first or last name in the box to find their evaluation data.

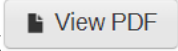


## Print

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

### Print an Overall Program Report

Print any of the screens that display overall data about everyone in your program:

1. Go to Evaluations > Reports
2. Open the report you want to print
3. Click 
4. Depending on browser, you'll get a message or PDF download in the bottom of your screen
  - Allow popups if asked
5. The PDF opens in a new tab. Click the three dots in the top right of the browser
6. Click **Print**
7. Choose Printer or Destination
8. Click **Print**

### Print an Individual Person's Report

1. Go to Evaluations > Reports
2. Select a specific person
3. Click View PDF
4. Verify that the box in front of this person is checked
5. Check the boxes for the tabs (reports) you want to print
6. Click View PDF. The document will open in a new window
7. Hover at the bottom of the screen and click the Printer icon
8. Select your print settings

### Print Reports for Multiple People

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

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

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

## **Configuring Assessment Settings**

### Assessment Settings

On one of the program-level reports, click the Gear icon to configure the Assessment Settings. These settings affect both the Evaluation Reports and the evaluation results in Milestone Reviews. These settings affect evaluation results on both milestone reviews and evaluation reports.

### Access Configuration

**Milestone Reviews** (Portfolio > Milestones > Settings > Assessment Settings)

**Evaluation Reports** (Evaluations > Reports > click the Gear icon)

### Turn Normalization Off/On

Normalize and average evaluation responses - By default, this process will be turned 'On.' If you do not want the evaluation results from your custom questions to be normalized and averaged, uncheck this box.

### Make "Has Not Achieved Level 1" Count as "Zero"

Some specialties allow this response on their milestones. By default, these responses are not counted in the learner's personal average, nor in the program's Peer Average.

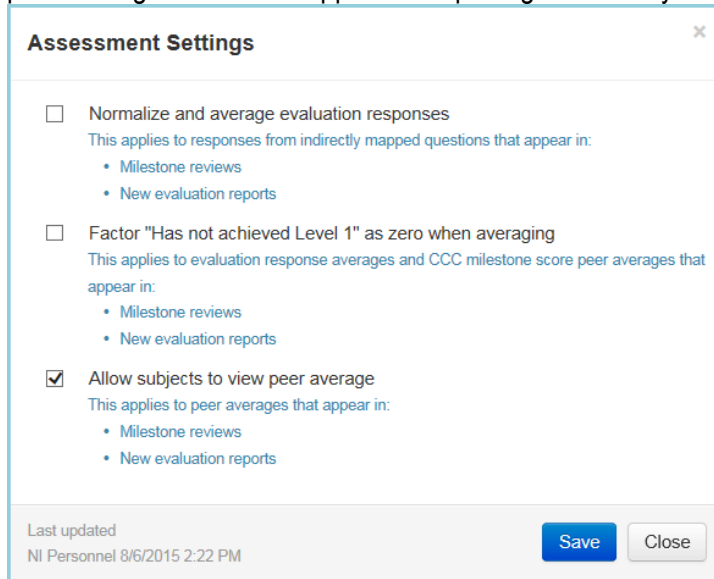
You can count these responses as 'zero' and include them in the averages. Check the box to count these responses as 'zero' in the averages.



## Allow Subjects to View Peer Averages

By default, this setting is 'Off.' If you want to allow evaluation subjects to view the peer averages for summary report and in milestone reviews, check this box. Checked, a peer column appears for residents and faculty.

Note: Whether or not you allow learners to see peer averages, the CCC can view peer averages, and the peer average column still appear on reports generated by an administrator



**Assessment Settings** [X]

☐ Normalize and average evaluation responses  
This applies to responses from indirectly mapped questions that appear in:

- Milestone reviews
- New evaluation reports

☐ Factor "Has not achieved Level 1" as zero when averaging  
This applies to evaluation response averages and CCC milestone score peer averages that appear in:

- Milestone reviews
- New evaluation reports

☒ Allow subjects to view peer average  
This applies to peer averages that appear in:

- Milestone reviews
- New evaluation reports

Last updated  
NI Personnel 8/6/2015 2:22 PM

**Save** **Close**

## Normalizing Evaluation Results

### What's normalization?

- It's on by default
- It affects the results in both Portfolio Milestones and Evaluation Reports
- It feeds more evaluation results into milestone subcompetency averages

### Why do we need it?

Most subcompetencies have a 1 to 5 standard grade scale.

Questions in your own words can have a variety of grade scales, such as 1-3, 1-5 and 1-9.

In order to include more scores in milestone subcompetency averages, we 'normalize' those results, which means we're converting those scores to the 1-5 scale.

What are its limits?

Questions in your own words that use a Boolean grade scale (Yes/No) **can't** be normalized.

Normalization formula

This formula normalizes grade scales that are not 1 - 5

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

**m** = minimum milestone value (0 or 1)

**M** = maximum milestone value (4 or 5)

**P** = rating scale position (selection chosen by evaluator)

**n** = number of choices on the grade scale

### After normalization, scores are averaged

Normalized scores are combined with scores from EPAs, subcompetencies, and custom subcompetencies to give an average evaluation score from questions mapped to a specific subcompetency.

Example

A resident received the following scores on her evaluations, and an average score of 3.38:

- 3.5 - Actual PC1 subcompetency (1 - 5 scale)
- 3.0 - EPA mapped to PC1 (1 - 5 scale)
- 3.5 - Custom Subcompetency mapped to PC1 (1 - 5 scale)
- 6.0 - General question mapped to PC1 (1 - 9 scale). The score of 6 is 'normalized,' using the formula above, to a score of 3.5.


### Turn off normalization

If you don't want evaluation results from your questions to be normalized and averaged, follow these steps:

1. Go to Portfolio > Milestones
2. In the left panel, click **Settings**
3. Click Assessment Settings
4. Uncheck Normalize and average evaluation responses
5. Click **Save**

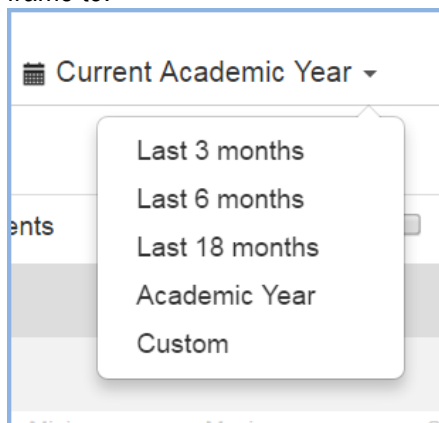
## Filtering Evaluation Reports

You can change what you see by filtering your evaluation report:

1. Click  **Filter** ▾
2. Check or uncheck the boxes:
  - **Filter by Evaluation Forms:** Select one or more evaluation forms to view
  - **Exclude Anonymous evaluations:** Only show results that are not anonymous
  - **Exclude On Hold evaluations:** Only show results that are not on hold
  - **Include Evaluations from Other Departments:** Include results from other departments when their personnel evaluated this rotation using the forms selected
3. Click **Apply**
  - The Filters you select will persist until you select another program. If you close New Innovations and then reopen it, a popup message will notify you that your previous filters are still in place.
  - The Filter icon will be 'blue' if there are any changes to the default settings. To clear the filters and return to the default settings:
    - Click Filter
    - Click Clear Filters

### Filter by Date

By default, the report will display results for the current Academic Year. Click the arrow to change the time frame to:



- Last 3, 6 or 18 months
- Academic Year - Once you select an Academic Year, you also have the option to select an interval. Click Apply. When viewing reports from a Department not associated with a program, such as the GME Office, refresh the page after selecting to view by Academic Year or changing the Academic Year.
- Resident Training Year
- Custom - Select a specific date range and click Apply.

The Dates you select will remain in place until you select another program or exit New Innovations.

### Identify Evaluators

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

## Printing Completed Evaluations

You can print completed evaluations from View Evaluations and Session Manager.

You can print pending evaluations from Session Manager.

### Print from View Evaluations

1. Go to Evaluations > View Evaluations
2. Make sure you are on the **Completed** tab
3. Select the Evaluator
4. Select the Subject
5. Click List ALL Evaluations
6. Check Hide identifying information in the header of the anonymous evaluations to keep evaluator info off of your print
7. Check the box in front of the evaluation you want to print
8. Click **View selected evaluations**  
A new tab opens with your evaluation. If it doesn't, look for a popup blocker message
9. Right-click on the evaluation and select **Print**
10. Print using your printer or PDF printer

The screenshot shows the 'View Evaluations' interface. At the top, there are tabs: Completed, Delinquent, Declined, On Hold, Pending Signatures, High/Low Scores, Eval Status List, and Program Director Comments. The 'Completed' tab is active. Below the tabs, there's a 'Personal Listing' section with filters for 'Filter by Year' (2015/2016), a date range (7/1/2015 to 6/30/2016), and three selection lists: Sessions, Evaluators, and Subjects. The 'Sessions' list has two items: '07/01/2015-07/31/2015 Faculty Evaluation of Resident' and '08/01/2015-08/31/2015 Faculty Evaluation of Resident'. The 'Evaluators' list has three items: 'Coates, Jeremy', 'Isknivol, Yrogerg', and 'Pedersen, Niles'. The 'Subjects' list has one item: 'Dack, Nicole'. Below these lists, there are checkboxes for 'Include Archived Items' and 'Do not mark evaluations as viewed'. There are also links for 'View selected evaluations', 'Return selected evals to 'On Hold'', and 'Hide evaluation form instructions'. A red arrow points to the 'Hide identifying information in the header of the anonymous evaluations' checkbox, which is checked. Below this, there's a table titled 'Residency Evaluations' with columns: Evaluator Name, Rotation/Subject Name, Rotation, Session Name, Start Date, Stop Date, and Session Date. The table has two rows: one for 'Coates, Jeremy' and one for 'Isknivol, Yrogerg'. Both rows are for 'Dack, Nicole' and 'PED:COMM PEDS (Department of Pediatrics/PEDS- General Pediatrics)'. The 'Session Name' for both is 'Faculty Evaluation of Resident (PEDS- General Pediatrics)'. The 'Start Date' is '7/1/2015' and the 'Stop Date' is '7/31/2015'. The 'Session Date' is '8/3/2015'.

Evaluator Name	Rotation/Subject Name	Rotation	Session Name	Start Date	Stop Date	Session Date
Coates, Jeremy	Dack, Nicole	PED:COMM PEDS (Department of Pediatrics/PEDS- General Pediatrics)	Faculty Evaluation of Resident (PEDS- General Pediatrics)	7/1/2015	7/31/2015	8/3/2015
Isknivol, Yrogerg	Dack, Nicole	PED:COMM PEDS (Department of Pediatrics/PEDS- General Pediatrics)	Faculty Evaluation of Resident (PEDS- General Pediatrics)	7/1/2015	7/31/2015	8/3/2015

[View selected evaluations](#)

[Return selected evals to 'On Hold'](#)

☐ Hide evaluation form instructions

☐ Do not mark evaluations as viewed

☐ Set  as the "Printed" date

☒ Hide identifying information in the header of the anonymous evaluations

## Print from Session Manager

1. Go to Evaluations > Session Manager
2. Select the correct academic year
3. Click either the Evaluator, Subject or Rotation tab
4. Click the small arrow in front of a person
5. Click the **Completed** tab
6. Check the box in front of the correct evaluation
7. Click **View**  
a new tab opens with your evaluation. If it doesn't, look for a popup blocker message
8. Right-click on the evaluation and select **Print**
9. Print using your printer or PDF printer

Sessions

By Evaluator

By Subject

By Rotation

By Date

Department people who are evaluators between 7/1/2015 and 6/30/2016 in any session

Person	Match Status	Delinquent	Pending	Completed	
<div> <div>▲</div> <div>Coates, Jeremy</div> </div>	Faculty	6	0	1	<a href="#">View Block Schedule</a>

All

Completed

Delinquent

Pending

🔍

View

☐ Hide evaluator info

Actions

▼


<input type="checkbox"/>		Subject	Status	Rotation	Session	Start	End	Available	Due	
<input checked="" type="checkbox"/>			Dack, Nicole	PRG 2	PED:NEO:NICU	<a href="#">Faculty Evaluation of Resident</a>	1/1/2016	1/31/2016	1/24/2016	2/3/2016
<input type="checkbox"/>			Dack, Nicole	PRG 2	PED:PICU	<a href="#">Faculty Evaluation of Resident</a>	12/1/2015	12/31/2015	12/24/2015	1/3/2016
<input type="checkbox"/>			Dack, Nicole	PRG 2	PED:ADOL	<a href="#">Faculty Evaluation of Resident</a>	11/1/2015	11/30/2015	11/23/2015	12/3/2015
<input type="checkbox"/>			Dack, Nicole	PRG 2	PED:INPT:WARD	<a href="#">Faculty Evaluation of Resident</a>	10/1/2015	10/31/2015	10/24/2015	11/3/2015

## GME ♥ - Reporting on Evaluations

These reports display evaluation information collected on your residents and fellows, including milestone results. The reports use the end date of the match to determine if the results are included. If the end date of the match falls within the date range of the report, it will be included.

### Report on GME-Level Evaluation Data

Get a global view of the evaluation information for the programs linked to a principal sponsor.

1. Go to Evaluations > Reports
2. If you don't already see a list of programs, click  near the top left to see GME-level reports
3. Select a principal sponsor or **Others** (if you want to view all programs not linked to a principal sponsor)
  - You'll see evaluation information for the programs linked to that principal sponsor
  - For each program, you'll see:
    - Resident Count** - Total number of residents in the program
    - Unmatched Residents** - Total number of residents who have not been included as a Subject in an Evaluation match
    - Distributed** - Total number of evaluations distributed within the program
    - Completed/Overall Compliance** - Total 'number' of evaluations completed and the 'percentage' of evaluations completed of those distributed within the program (All

Evaluators)

**Faculty Compliance** - Percentage of completed evaluations where the evaluator had a Work Role of Faculty (Faculty only) and the subject had a Work Role of Resident.  
(Includes on-demand evaluations)

**On Time** - Number of evaluations completed by the Due Date (All Evaluators)

**Late** - Number of evaluations completed past the Due Date (All Evaluators)

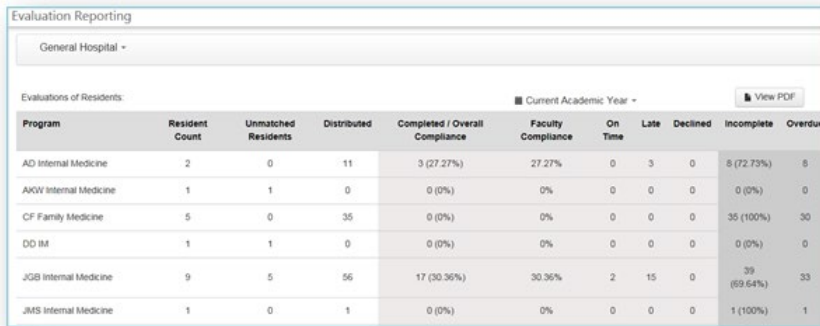
**Declined** - Number of evaluations returned (declined) by the evaluator (All Evaluators)

**Incomplete** - Total number and percentage of evaluations that have not been submitted (All Evaluators)

**Overdue** - Total number of incomplete evaluations that are past the due date. For example, if the Due Date for an evaluation was yesterday or earlier and the End Date of the match falls within the date range of the report and the evaluation has not been completed, it will be included in this count. (All Evaluators)

4. You can:

- Use the date ranges on the page or create a custom date range
- Click on a program to view the data for that program. See more about program reports below
- Click **View PDF** to print
- Click a program to view its program-level evaluation reports



The screenshot shows the 'Evaluation Reporting' interface for 'General Hospital'. It displays a table titled 'Evaluations of Residents' for the 'Current Academic Year'. The table includes columns for Program, Resident Count, Unmatched Residents, Distributed, Completed / Overall Compliance, Faculty Compliance, On Time, Late, Declined, Incomplete, and Overdue. A 'View PDF' button is visible in the top right corner of the table area.

Program	Resident Count	Unmatched Residents	Distributed	Completed / Overall Compliance	Faculty Compliance	On Time	Late	Declined	Incomplete	Overdue
AD Internal Medicine	2	0	11	3 (27.27%)	27.27%	0	3	0	8 (72.73%)	8
AKW Internal Medicine	1	1	0	0 (0%)	0%	0	0	0	0 (0%)	0
CF Family Medicine	5	0	35	0 (0%)	0%	0	0	0	35 (100%)	30
DD IM	1	1	0	0 (0%)	0%	0	0	0	0 (0%)	0
JGB Internal Medicine	9	5	56	17 (30.36%)	30.36%	2	15	0	39 (69.64%)	33
JMS Internal Medicine	1	0	1	0 (0%)	0%	0	0	0	1 (100%)	1

## Reporting on Resident & Fellow Evaluations

You can see a number of evaluation-related reports at the program or individual learner level:

For more information about evaluation reports set up go to [Help>Tutorial Videos>Evaluations \[8.30\] Evaluations- Reports-Residents](#)

### Program-level view

1. Go to Evaluations > Reports
2. If you have access to more than one program, select a program from the dropdown list  
You'll land on the **Residents** tab and see the **Performance** Report
3. Click the report type dropdown

Performance ▼

4. Pick a program-level report (more on each below):
  - Performance
  - Competency
  - Compliance
  - Subcompetency
5. With any of these reports, you can:
  - Uncheck **Group by Year** to view all residents in alphabetical order
  - Click **Filter** to edit the parameters of the report
  - Click on a learner to view the data for that person
  - Click **View PDF** to print

## Performance Report

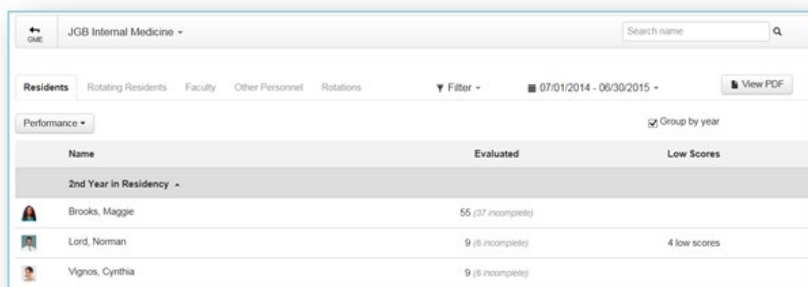
This report provides an overview of performance data collected, grouped by year, originating from the selected department.

This report displays:

**Name** - The residents' names and pictures are shown

**Evaluated** - The number of completed evaluations about the resident is shown, and in parentheses the number of evaluations distributed with the resident as the subject that have not been completed

**Low Scores** - The number of low scores that the resident has received on questions marked to give Low Scores



Name	Evaluated	Low Scores
2nd Year in Residency -		
Brooks, Maggie	55 (37 incomplete)	
Lord, Norman	9 (8 incomplete)	4 low scores
Vignos, Cynthia	9 (8 incomplete)	

## Competency Report

You can prepare to use this report type by building evaluations with ACGME milestone Core Competency tags (not subcompetency tags). This report displays results from questions that meet three criteria:

- Question type: General Question (these are standard questions in your own words)
- Question grade scale: "rating"
- Tagged with: Core Competency tags

This report displays:

**Name** - The residents' names and pictures are shown, grouped by Year in Residency. Uncheck the box for Group by Year to view all residents in alphabetical order

**Core Competencies** - Each resident's level of competency is shown as a percentage for each Core Competency (Patient Care, Medical Knowledge, etc.) (Note: OPOMM stands for Osteopathic Principles and Practices and Manipulative Medicine)

- Calculations - All results are converted to percentages, then averaged

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

**Overall-** This score is an average of all competency scores the resident received

- Calculations - Responses to all questions are converted to a percentage, and then averaged. (It is NOT an average of the averages.)
- Example - A resident receives a total of 50 responses. These responses are each converted to a percentage, added together and divided by 50 to get the Overall average.

The screenshot shows a web interface for 'JGB Internal Medicine - Residents'. It includes a search bar, tabs for 'Residents', 'Rotating Residents', 'Faculty', 'Other Personnel', and 'Rotations'. A date range filter is set to '07/01/2014 - 06/30/2015'. A 'View PDF' button is present. Below the filters, there's a 'Competency' dropdown and a 'Group by year' checkbox. The main table displays competency scores for residents, grouped by 'Year in Residency'.

Name	PC	MK	PBLI	ICS	PRO	SBP	OPOMM	Overall
<b>2nd Year in Residency</b>								
Brooks, Maggie	84.29%	N/A	N/A	87.14%	N/A	N/A	N/A	85.71%
Lord, Norman	51.11%	N/A	N/A	51.11%	N/A	N/A	N/A	51.11%
Vignos, Cynthia	68.00%	N/A	N/A	55.56%	N/A	N/A	N/A	57.78%
<b>3rd Year in Residency</b>								
Grimes, John	100.00%	N/A	N/A	100.00%	N/A	N/A	N/A	100.00%
Julka, Vijay	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Schell, Grant	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

## Compliance Report

This report displays information about the compliance rate of the resident for completing assigned evaluations.

Evaluations are included if:

- The End Date of the match falls within the date range of the report
- The evaluation's Due Date is in the past

This report displays:

**Name** - The residents' names and pictures are shown, grouped by 'Year in Residency.' Uncheck the box for 'Group by Year' to view all residents in alphabetical order.

**Assigned** - The total number of evaluations assigned to the resident that have a Due Date during the report period

**Compliance** - The number of completed evaluations divided by the number of assigned evaluations. The percentage of completed evaluations is shown in parenthesis

**Calculations** - The number of evaluations that were completed divided by the total number of assigned evaluations

- Example - A resident has 50 evaluations assigned to her with Due Dates in the past. She completed 36 on time and 4 of them late (past the Due Date). Forty completed evaluations divided by 50 assigned equals 80%. Her Compliance column would display 40/50 (80%).

**Completed on Time** - The number and percentage of evaluations that were completed on time (by 11:59 pm on the Due Date)

- Calculations - The number of evaluations that were declined or completed on time divided by the total number of assigned evaluations
- Example - A resident has 50 evaluations assigned to her with Due Dates in the past. She completed 36 on time and 4 of them late (past the Due Date). Her 'Completed on Time' column would display 36 (72%).



**Completed Late** – The number and percentage of evaluations completed late (after 11:59 PM on the Due Date)

- Calculations - The number of evaluations that were completed late divided by the total number of assigned evaluations
- Example - A resident has 50 evaluations assigned to her with Due Dates in the past. She completed 36 on time and 4 of them late (past the Due Date). Four evaluations completed late divided by 50 assigned equals 8%. Her 'Completed Late' column would display 4 (8%).

**Declined** – The number and percentage of evaluations returned (declined) by the evaluator

- Calculations - The number of evaluations that were returned divided by the total number of assigned evaluations
- Example - A resident has 30 evaluations assigned to her with Due Dates in the past. She returned (declined) 5 of them. Five divided by 30 equals 16.67%. Her 'Declined' column would display 5 (16.67%).

**Delinquent** – The number of evaluations assigned to the resident that have not been completed and are past the Due Date.

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

## Subcompetency Report

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

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

This report displays:

**Name** - The residents' names and pictures are shown, grouped by 'Year in Residency.' Uncheck the box for 'Group by Year' to view all residents in alphabetical order.

**Competencies** – Each Core Competency has its own column. Within each column the subcompetencies are displayed with the average score that the resident received on that subcompetency from evaluation feedback

- Calculations - Normalization is on by default.
- For specialties that have a 'Has not achieved Level 1' or a similar option in their subcompetencies, these responses can be counted as 'zero' and can be included in the resident's average and into the Peer Average

JOB Internal Medicine - Search name

Residents Rotating Residents Faculty Other Personnel Rotations Filter 07/01/2014 - 06/30/2015 View PDF

Subcompetency Group by year

Name	PC	MK	PBLI	ICS	PRO	SBP
2nd Year in Residency						
Brooks, Maggie	PC 1 PC 2 PC 3 PC 4 3.25 4.00 3.00 3.00 3.00	MK 1 MK 2 3.25 3.00	PBLI 1 PBLI 2 PBLI 3 PBLI 4 3.00 3.00 3.00 3.00	ICS 1 ICS 2 ICS 3 3.00 3.00 3.00	PRO 1 PRO 2 PRO 3 PRO 4 3.00 3.00 3.00 3.00	SBP 1 SBP 2 SBP 3 SBP 4 3.00 3.00 3.00 3.00
Lord, Norman	PC 1 PC 2 PC 3 PC 4 2.25 2.00 2.00 2.00 2.00	MK 1 MK 2 2.00 1.00	PBLI 1 PBLI 2 PBLI 3 PBLI 4 1.00 2.00 2.00 2.00	ICS 1 ICS 2 ICS 3 2.00 2.00 2.00	PRO 1 PRO 2 PRO 3 PRO 4 2.00 2.00 2.00 2.00	SBP 1 SBP 2 SBP 3 SBP 4 2.00 2.00 2.00 2.00
Vignos, Cynthia	PC 1 PC 2 PC 3 PC 4 3.00 2.00 3.00 2.00 2.00	MK 1 MK 2 2.00 2.00	PBLI 1 PBLI 2 PBLI 3 PBLI 4 2.00 2.00 2.00 2.00	ICS 1 ICS 2 ICS 3 2.00 2.00 2.00	PRO 1 PRO 2 PRO 3 PRO 4 2.00 2.00 2.00 2.00	SBP 1 SBP 2 SBP 3 SBP 4 2.00 2.00 2.00 2.00

## Osteopathic Milestones

If a program has Osteopathic Recognition (OR), a second tab will be available on the program-level Subcompetency report. Click the Osteopathic Recognition tab to view the results of evaluations that contained any of the following:

- Actual OR subcompetencies inserted on the form, either manually or rotation-based
- Responses mapped to OR subcompetencies, such as EPAs, custom subcompetencies and general questions (in your own words)
- See the details above for more information on the Subcompetency report

Residents

Rotating Residents

Faculty



Other Personnel

Rotations

Filter

Current Academic Year

Subcompetency

Internal Medicine		Osteopathic Recognition				
Name	PC	MK	PBLI	ICS	PRO	
1st Year in Residency						
 <div>Durbin, Nancy</div>	PC 1	PC 2	MK 1	PBLI 1	ICS 1	PRO 1
	2.50	3.00	2.50	2.00	2.50	2.50
 <div>Laskovski, Jovan</div>	PC 1	PC 2	MK 1	PBLI 1	ICS 1	PRO 1
	2.50	2.00	2.00	2.00	2.00	2.00

## Other versions of Milestones

If your program has multiple versions of Milestones, and evaluation results are tied to subcompetencies or milestones from both versions within the span of the reporting dates (e.g. 7/1/2017 - 6/30/2019), then you'll see tabs for the current version and the old version:

Overall	Tags	Comments	<b>Subcompetency</b>	Milestones	Competency
Neurological Surgery					
Neurological Surgery (v.1)					
Training Year			PC		
2nd Year in Residency			PC 1	PC 2	PC 3
			2.25	2.00	2.00
			PC 5	PC 6	PC 7
			2.00	2.25	2.00
					PC 8
					2.25


## Individual-level view

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

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

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

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



**Brooks, Maggie ▾**  
Evaluated 55 times  
Has completed 15 evaluations  
Rotation Data...

## Overall Report

The Overall Report shows the results from every question on every evaluation form that was used to evaluate the resident/fellow. The End Date of the match must fall within the date range of the report to be included. Comments are displayed by default.

Generate the Overall Report:

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

The first column on the Overall Report includes:

- Form - Name of the evaluation form
- Question - Shows the actual question text
- Grade Scale used
- Comments - Displays any comments made by the evaluator for this question

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

### Results from a Rating Scale – Select from a Range of Scores (Low to High)

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

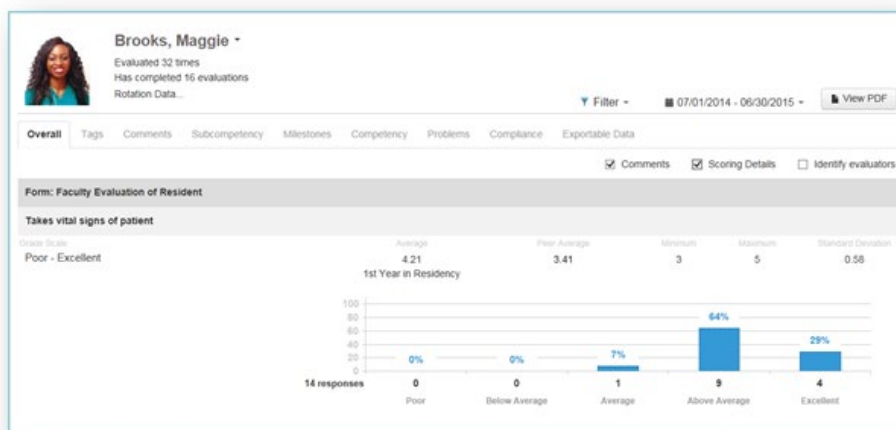
- Average - Displays the average score the resident received on the question
- Peer Average - Shows the average score of the resident's Peer Group within their program. Click on the score to view the people who compose the Peer Group. The Peer Group consists of those residents who have the same 'Year in Training' for the date range of the report. The Peer Average will still appear on the report even if the settings do not allow subjects to view the Peer Average. In the General Features section of this document, read 'Assessment Settings' for more details.
- Minimum - Displays the lowest score given to the resident
- Maximum - Shows the highest score given to the resident
- Standard Deviation - Displays the variation or dispersion of the results from the average score

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

Average' score for 7% of the scores received

Above Average' scores for 64% of the scores received

Excellent' scores for 29% of the scores received



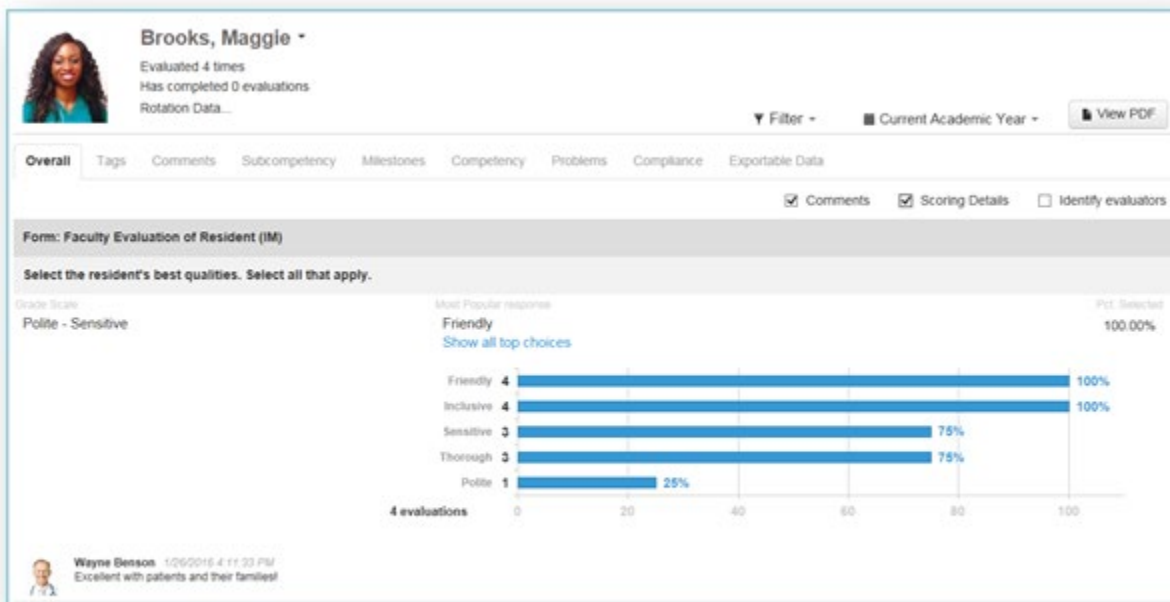
## Results from a Multiple Choice Grade Scale – Select Best Answer

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



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

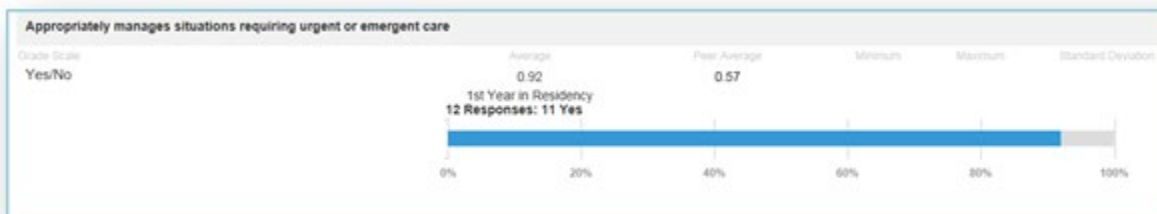
When evaluators are given the option to select 'All that apply' from a multiple-choice list, the option that received the most 'votes' will be shown in the 'Most Popular Response' column. In the example below, four faculty members completed this question by selecting multiple good qualities of the resident.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



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

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

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



### Results from a Number Grade Scale – Enter a Numeric Value

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



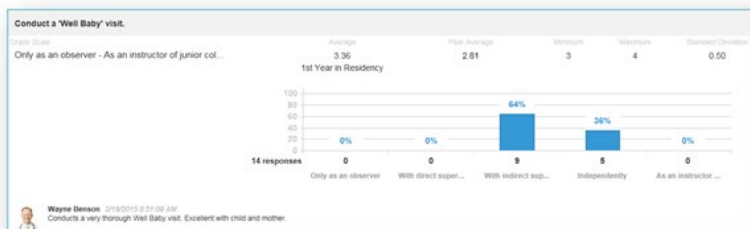
### Results from a Text Grade Scale – Enter a Written Response

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

### Results from Specialized Questions

Results from EPA (Entrustable Professional Activity) Questions

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



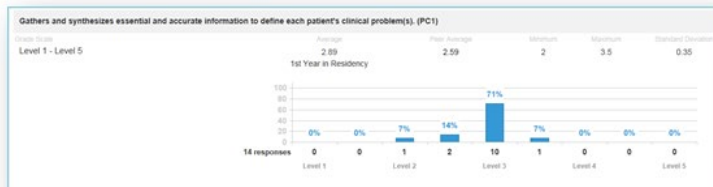
## Results from Milestone Questions

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



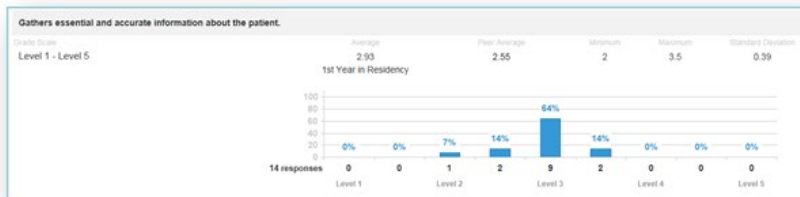
## Results from Subcompetency Questions

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



## Results from Custom Subcompetency Questions

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



## Tags Reports

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

### Tag by Grade Scale

Generate the 'Tag by Grade Scale' Report:

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

**Brooks, Maggie**  
Evaluated 10 times  
Has completed 0 evaluations  
Rotation Data...

Filter - Current Academic Year - View PDF

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

Tag by Grade Scale Tag by Question

☒ Comments ☐ Scoring Details ☐ Identify evaluators

**Tag: Professional Behavior**

Poor - Excellent

Average	Peer Average	Minimum	Maximum	Standard Deviation
4.89	4.27	4	5	0.33

2nd Year in Residency

**David Bradshaw** 1/07/2016 2:40:46 PM  
Resident was very sensitive and caring with a Muslim family.

**Teresa Spino** 1/07/2016 2:42:06 PM  
Very honest!

**Listens to all opinions - Attends team meetings on a reg...**

Most Popular response  
Attends team meetings on a regular basis  
[Show all top choices](#)

Pct. Selected  
30%

**Teresa Spino** 1/07/2016 2:42:06 PM  
Not afraid to be an advocate for the patient!

**Tag: Overall**

Yes/No

Average	Peer Average	Minimum	Maximum	Standard Deviation
1	0.93	N/A	N/A	N/A

2nd Year in Residency

**Professionalism - Leadership**

Most Popular response  
Medical Knowledge  
[Show all top choices](#)

Pct. Selected  
42.86%

**Teresa Spino** 1/06/2016 4:14:55 PM  
Very good at finding solutions to equipment problems.

**Tag: Patient Caring**

Poor - Excellent

Average	Peer Average	Minimum	Maximum	Standard Deviation
4.89	4.27	4	5	0.33

2nd Year in Residency

**David Bradshaw** 1/07/2016 2:40:46 PM  
Very thorough process.

**Tag: Clinical Practice**



## Tag by Question

Generate the 'Tag by Question' report:

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

The screenshot shows a web interface for a resident's evaluation report. At the top, it identifies the resident as 'Brooks, Maggie', who has been evaluated 10 times and has completed 0 evaluations. Below this, there are tabs for 'Overall', 'Tags', 'Comments', 'Subcompetency', 'Milestones', 'Competency', 'Problems', 'Compliance', and 'Exportable Data'. The 'Tags' tab is selected, and within it, 'Tag by Question' is chosen. There are checkboxes for 'Comments' (checked), 'Scoring Details' (unchecked), and 'Identify evaluations' (unchecked). The report is organized into sections for different tags. The first section is 'Tag: Professional Behavior', with a description 'Works well with patients and families of different socio-economic backgrounds, religions, sexual preferences and cultures.' It shows a 'Poor - Excellent' scale with an average of 5, a peer average of 4.2, and a standard deviation of 0.33. A specific evaluation by David Bradshaw is shown with a comment: 'Resident was very sensitive and caring with a Muslim family.' The next section is 'Select the attributes of this resident when working within an interprofessional team.' It lists 'Listens to all opinions - Attends team meetings on a reg...' and 'Attends team meetings on a regular basis' with a 'No Answer' result. The third section is 'Resident is a good role model for professional behavior.' It shows an average of 4.67, a peer average of 4.2, and a standard deviation of 0.33. The fourth section is 'Tag: Overall', with a description 'Select the resident's best skill. Select only one.' It shows 'Professionalism - Leadership' as the selected skill with a 42.86% result. The fifth section is 'Is the resident progressing as expected?' with a 'Yes/No' scale showing a result of 1, a peer average of 0.9, and a standard deviation of N/A. The final section is 'Tag: Patient Care', with a description 'Takes vital signs of patient'. It shows an average of 5, a peer average of 4.4, and a standard deviation of 0.33. A specific evaluation by David Bradshaw is shown with a comment: 'Very thorough process.'

## Comments Reports

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

### Comments by Evaluator

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

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

**Brooks, Maggie**  
 Evaluated 55 times  
 Has completed 15 evaluations  
 Rotation Data...

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

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

Comments by Evaluator

☒ Show Question ☐ Identify evaluators

**Anonymous**

**Overall comments:**

Excellent resident!

**Benson, Wayne**

**Question comments:**

Conduct a 'Well Baby' visit.  
 12/10/2014 8:54:25 AM JGB: Ambulatory  
 Excellent with patient and family.

Conduct a 'Well Baby' visit.  
 2/19/2015 8:51:09 AM JGB: VA  
 Conducts a very thorough Well Baby visit. Excellent with child and mother.

Clinical knowledge (MK1)  
 12/10/2014 8:58:36 AM JGB: Cardiology  
 Excellent knowledge of diseases and symptoms.

**Overall comments:**

12/10/2014 8:54:25 AM JGB: Ambulatory  
 Excellent first year resident!

**Bradshaw, David**

**Question comments:**

Appropriately manages situations requiring urgent or emergent care  
 12/10/2014 8:58:54 AM JGB: EM  
 Works well in stressful ER situations.

Has professional and respectful interactions with patients, caregivers and members of the interprofessional team (e.g. peers, consultants, nursing, ancillary professionals and support personnel). (PROF1)  
 2/19/2015 1:04:48 PM JGB: Ambulatory  
 Excellent resident!

**Overall comments:**

12/10/2014 8:58:54 AM JGB: EM  
 Outstanding resident!

## Comments by Rotation

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

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

**Brooks, Maggie**  
 Evaluated 10 times  
 Has completed 0 evaluations  
 Rotation Data...

Filter 07/01/2015 - 06/30/2016 View PDF

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

Comment by Rotation

☒ Show Question ☐ Identify evaluators

**Rotation: JGB: Ambulatory**

**Benson, Wayne**

**Question comments:**

Select the resident's best qualities. Select all that apply.  
 12/02/2014 4:11:29 PM  
 Excellent with patients and their families!

What opportunities for improvement would you recommend for this resident?  
 12/02/2014 4:11:29 PM  
 Do more research

**Rotation: JGB: Cardiology**

**Benson, Wayne**

**Question comments:**

What opportunities for improvement would you recommend for this resident?  
 12/02/2014 4:12:28 PM  
 Communicating with nurses

**Overall comments:**

12/02/2014 4:12:28 PM  
 Excellent resident!

**Rotation: JGB: Consults**

**Benson, Wayne**

**Question comments:**

What opportunities for improvement would you recommend for this resident?  
 12/02/2014 4:22:28 PM  
 None

**Rotation: JGB: EM**

**Bradshaw, David**

**Question comments:**

What opportunities for improvement would you recommend for this resident?  
 12/02/2014 4:24:27 PM  
 Research history of patient more

## Comments by Tag

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

The screenshot shows the 'Comments by Tag' report for Maggie Brooks, who has been evaluated 10 times and has completed 0 evaluations. The report is filtered by 'Current Academic Year' and 'View PDF'. The 'Comments' tab is selected, and the 'Comment By Tag' dropdown is set to 'Tag: Clinical Practice'. The report displays three comments:

- Tag: Clinical Practice**  
Bradshaw, David  
Takes vital signs of patient  
1/27/2019 2:40:45 PM JGB: Geniatrics  
Very thorough process.
- Tag: Communication**  
Bradshaw, David  
Works well with patients and families of different socio-economic backgrounds, religions, sexual preferences and cultures.  
1/27/2019 2:40:45 PM JGB: Geniatrics  
Resident was very sensitive and caring with a Muslim family.
- Tag: Overall**  
Spino, Teresa  
Select the resident's best skill. Select only one.  
1/28/2019 4:14:55 PM JGB: Pediatrics  
Very good at finding solutions to equipment problems.
- Tag: Patient Caring**  
Bradshaw, David  
Takes vital signs of patient  
1/27/2019 2:40:45 PM JGB: Geniatrics  
Very thorough process.

## Comments by Form

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

The screenshot shows the 'Comments by Form' report for Maggie Brooks, who has been evaluated 10 times and has completed 11 evaluations. The report is filtered by '07/01/2014 - 06/30/2015' and 'View PDF'. The 'Comments' tab is selected, and the 'Comment By Form' dropdown is set to 'Form: Faculty Evaluation of Resident'. The report displays three forms:

- Form: Faculty Evaluation of Resident**  
Benson, Wayne  
Question comments:  
Conduct a 'Well Baby' visit.  
1/28/2019 8:18:48 AM JGB: Gen  
Conducts a very thorough 'Well Baby' visit. Excellent with child and mother.  
Conduct a 'Well Baby' visit.  
1/28/2019 8:18:48 AM JGB: Geniatrics  
Excellent with patient and family.  
Clinical knowledge (HPI)  
1/28/2019 8:18:48 AM JGB: Geniatrics  
Excellent knowledge of diseases and symptoms.  
Overall comments:  
1/28/2019 8:18:48 AM JGB: Geniatrics  
Excellent for case resident.
- Form: Faculty Evaluation of Resident**  
Bradshaw, David  
Question comments:  
Appropriately manages situations requiring urgent or emergent care  
1/28/2019 8:18:48 AM JGB: Gen  
Works well in stressful EM situations.  
Has professional and respectful interactions with patients, caregivers and members of the interprofessional team (e.g. peers, consultants, nursing, ancillary professionals and support personnel) (PROM)  
1/28/2019 8:18:48 AM JGB: Geniatrics  
Excellent resident.  
Overall comments:  
1/28/2019 8:18:48 AM JGB: Gen  
Outstanding resident.
- Form: Faculty Evaluation of Resident**  
Spino, Teresa  
1/28/2019 8:18:48 AM JGB: Pediatrics  
Excellent resident.
- Form: Shift Card**  
Anonymous  
Overall comments:  
Excellent resident.

## Subcompetency Report

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

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

Generate the Subcompetency Report:

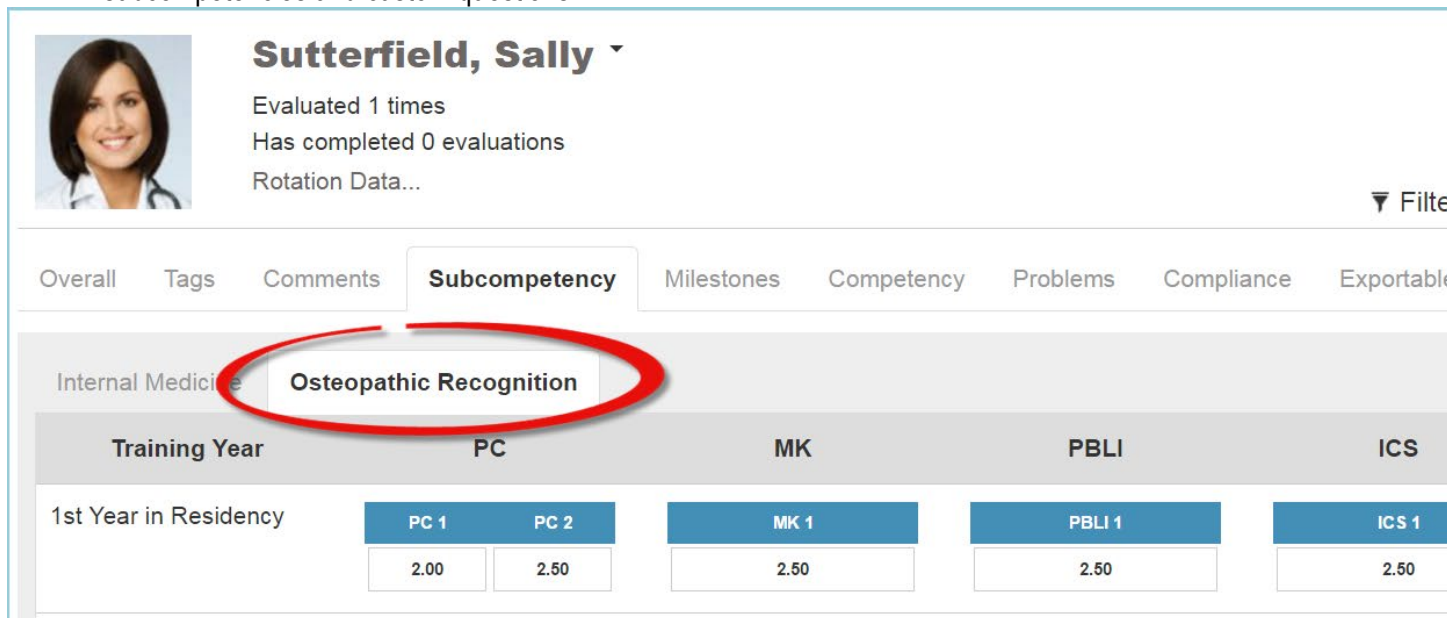
1. Go to Evaluations > Reports
2. Select a Resident
3. Click the Subcompetency tab

This report displays the following information:

- Training Year - The resident's scores are shown, grouped by 'Year in Residency'
- Competencies - Each Core Competency (Patient Care, Medical Knowledge, etc.) has its own
- Calculations
- For those subspecialties that have a 'Has not achieved Level 1' option in their subcompetencies, these responses can be counted as 'zero' and can be included in the resident's average and into the Peer Average.

If your program has Osteopathic Recognition (OR), there will be an additional tab on the Subcompetency report. Click the Osteopathic Recognition tab to view the evaluation results from forms that contained:

- Actual OR subcompetencies inserted on the form, either manually or rotation-based
- Responses from questions tagged or mapped to OR subcompetencies, such as EPAs, custom subcompetencies and custom questions



**Sutterfield, Sally** ▾

Evaluated 1 times  
Has completed 0 evaluations  
Rotation Data...

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

Internal Medicine **Osteopathic Recognition**

Training Year	PC		MK	PBLI	ICS
1st Year in Residency	PC 1	PC 2	MK 1	PBLI 1	ICS 1
	2.00	2.50	2.50	2.50	2.50

## Milestones Report


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

Generate the Milestones Report:

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

This report displays the following columns:

- Training Year - The resident's scores are shown, grouped by 'Year in Residency'
- Competencies - Each Core Competency (Patient Care, Medical Knowledge, etc.) has its own column. The subcompetencies (PC1, PC2, etc.) are displayed under each column. The average scores from milestone questions are displayed under the proper level (Level 1, Level 2, etc.) within the subcompetencies. If a Level has an 'X' for a score, no data was collected for that milestone.
- Calculations - Milestone questions have a 'Yes' or 'No' grade scale. The score shown is the percentage of 'Yes' selections the resident received (Number of 'Yes' scores/Total number of scores).
- Example - On a milestone question, three evaluators said 'Yes, the resident is competent on this milestone.' One evaluator gave a score of 'No.' Three of four (3/4) evaluators said 'Yes,' giving the resident a score of 75% on that one milestone.



Brooks, Maggie

Evaluated 55 times

Has completed 15 evaluations

Rotation Data...

Filter

07/01/2014 - 06/30/2015

View PDF

Overall

Tags

Comments

Subcompetency

Milestones

Competency

Problems

Compliance

Exportable Data

Training Year	PC	MK	PBLI	ICS	PRO	SBP																																																																																																																																				
1st Year in Residency	<table><tr><td>PC 1</td><td>80</td><td>88</td><td></td><td></td><td></td></tr><tr><td>PC 2</td><td>87</td><td>58</td><td></td><td></td><td></td></tr><tr><td>PC 3</td><td>100</td><td>100</td><td>78</td><td></td><td></td></tr><tr><td>PC 4</td><td>50</td><td>100</td><td></td><td></td><td></td></tr><tr><td>PC 5</td><td>88</td><td></td><td></td><td></td><td></td></tr></table>	PC 1	80	88				PC 2	87	58				PC 3	100	100	78			PC 4	50	100				PC 5	88					<table><tr><td>MK 1</td><td>100</td><td></td><td></td><td></td><td></td></tr><tr><td>MK 2</td><td>87</td><td>100</td><td></td><td></td><td></td></tr></table>	MK 1	100					MK 2	87	100				<table><tr><td>PBLI 1</td><td>100</td><td></td><td></td><td></td><td></td></tr><tr><td>PBLI 2</td><td>80</td><td></td><td></td><td></td><td></td></tr><tr><td>PBLI 3</td><td>80</td><td>100</td><td></td><td></td><td></td></tr><tr><td>PBLI 4</td><td>80</td><td>100</td><td></td><td></td><td></td></tr></table>	PBLI 1	100					PBLI 2	80					PBLI 3	80	100				PBLI 4	80	100				<table><tr><td>ICS 1</td><td>75</td><td>100</td><td></td><td></td><td></td></tr><tr><td>ICS 2</td><td>87</td><td>100</td><td></td><td></td><td></td></tr><tr><td>ICS 3</td><td>100</td><td>100</td><td></td><td></td><td></td></tr></table>	ICS 1	75	100				ICS 2	87	100				ICS 3	100	100				<table><tr><td>PRO 1</td><td>75</td><td>100</td><td></td><td></td><td></td></tr><tr><td>PRO 2</td><td>75</td><td>100</td><td></td><td></td><td></td></tr><tr><td>PRO 3</td><td>87</td><td></td><td></td><td></td><td></td></tr><tr><td>PRO 4</td><td>33</td><td>100</td><td></td><td></td><td></td></tr></table>	PRO 1	75	100				PRO 2	75	100				PRO 3	87					PRO 4	33	100				<table><tr><td>SBP 1</td><td>87</td><td></td><td></td><td></td><td></td></tr><tr><td>SBP 2</td><td>88</td><td>100</td><td></td><td></td><td></td></tr><tr><td>SBP 3</td><td>87</td><td>100</td><td></td><td></td><td></td></tr><tr><td>SBP 4</td><td>88</td><td></td><td></td><td></td><td></td></tr></table>	SBP 1	87					SBP 2	88	100				SBP 3	87	100				SBP 4	88				
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## Competency Report

The Competency Report displays data collected about the resident from General questions (Standard questions in your own words) that have been tagged to Core Competencies. Only 'Rating' grade scales are displayed. No subcompetencies or milestones are included. If evaluation forms contained standard questions that were mapped to subcompetencies but not to core competencies, they will not show up on the competency report.

The results are:


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

Generate the Competency Report:

- Go to Evaluations > Reports
- Click a resident's name
- Click the Competency tab

This report displays the following columns:

- Training Year - The resident's scores are shown, grouped by 'Year in Residency.' Also shows the Peer Average
- Core Competencies - The resident's level of competency is shown as a percentage for each Core Competency (Patient Care, Medical Knowledge, etc.) (Note: OPOMM stands for Osteopathic Principles and Practices and Manipulative Medicine.)
- Calculations - All results are converted to percentages and then averaged.
- Example - On two Patient Care questions, a resident received a 3 on a scale of 1 - 5 and a 7 on a scale of 1 - 9. The 3 is converted to 60% and the 7 is converted to 77.78%. These are then averaged  $((60 + 77.78)/2)$  for a score of 68.89% in Patient Care.
- Overall - This score is an average of all scores the resident received
- Calculations - Responses to all questions are converted to a percentage, then averaged. (It is NOT an average of the averages.)
- Example - A resident receives a total of 50 responses. These responses are each converted to a percentage, added together and divided by 50 to get the Overall average.
- Rotation – Each of the resident's rotations are displayed below for the time period indicated, along with the average score they received for each core competency during that rotation.



Brooks, Maggie

Evaluated 10 times  
Has completed 15 evaluations  
[Rotation Data](#)

▼ Filter

7/15/2014 - 06/30/2015

View PDF

Overall	Tags	Comments	Subcompetency	Milestones	Competency	Problems	Compliance	Exportable Data																																
<div>Training Year</div> <table><tr><td></td><td>PC</td><td>MK</td><td>PBL1</td><td>ICS</td><td>PRO</td><td>SBP</td><td>OPOMM</td></tr><tr><td>Resident Average (1st Year in Residency)</td><td>84.21%</td><td>0.00%</td><td>0.00%</td><td>87.14%</td><td>0.00%</td><td>0.00%</td><td>0.00%</td></tr><tr><td>Peer Average</td><td>68.13%</td><td>0.00%</td><td>0.00%</td><td>68.13%</td><td>0.00%</td><td>0.00%</td><td>0.00%</td></tr></table>										PC	MK	PBL1	ICS	PRO	SBP	OPOMM	Resident Average (1st Year in Residency)	84.21%	0.00%	0.00%	87.14%	0.00%	0.00%	0.00%	Peer Average	68.13%	0.00%	0.00%	68.13%	0.00%	0.00%	0.00%								
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<div>Rotation</div> <table><tr><td></td><td>PC</td><td>MK</td><td>PBL1</td><td>ICS</td><td>PRO</td><td>SBP</td><td>OPOMM</td></tr><tr><td>JGB Ambulatory (1st Year in Residency)</td><td>90.00%</td><td>0.00%</td><td>0.00%</td><td>90.00%</td><td>0.00%</td><td>0.00%</td><td>0.00%</td></tr><tr><td>JGB Cardiology (1st Year in Residency)</td><td>80.00%</td><td>0.00%</td><td>0.00%</td><td>100.00%</td><td>0.00%</td><td>0.00%</td><td>0.00%</td></tr><tr><td>JGB Consults (1st Year in Residency)</td><td>90.00%</td><td>0.00%</td><td>0.00%</td><td>90.00%</td><td>0.00%</td><td>0.00%</td><td>0.00%</td></tr></table>										PC	MK	PBL1	ICS	PRO	SBP	OPOMM	JGB Ambulatory (1st Year in Residency)	90.00%	0.00%	0.00%	90.00%	0.00%	0.00%	0.00%	JGB Cardiology (1st Year in Residency)	80.00%	0.00%	0.00%	100.00%	0.00%	0.00%	0.00%	JGB Consults (1st Year in Residency)	90.00%	0.00%	0.00%	90.00%	0.00%	0.00%	0.00%
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JGB Consults (1st Year in Residency)	90.00%	0.00%	0.00%	90.00%	0.00%	0.00%	0.00%																																	

## Problems Report

The Problems Report has two sections:

Questions receiving low scores:

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

Questions scoring below a certain percentage:

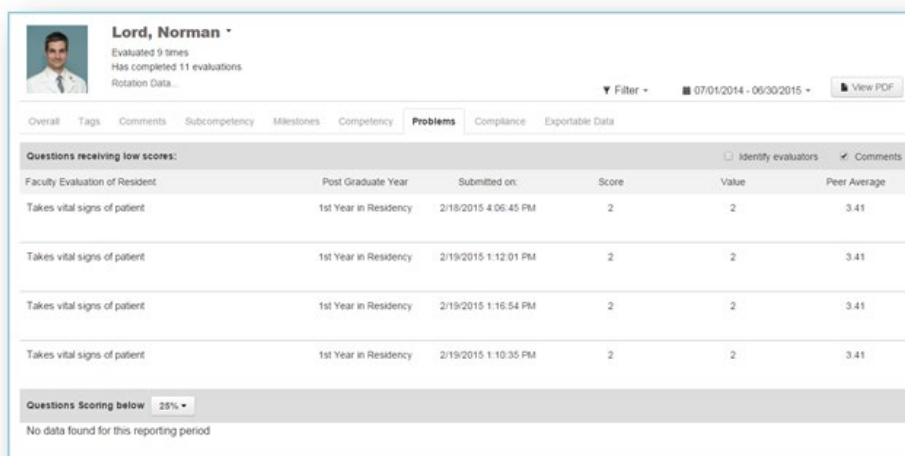
- Defaults to questions scored in the bottom 25% of the grade scale
- Can be changed to 10%, 15%, 20% or Suppressed to 0%.

Generate the Problems Report:

- Go to Evaluations > Reports
- Select a resident
- Click the Problems tab

This report displays the following columns:

- Evaluation form – Displays the name of the evaluation form and the question text
- Post Graduate Year – Shows the resident's 'Year in Residency'
- Submitted on – Displays the date and time the evaluation was completed
- Score – Shows the text of the selection chosen by the evaluator (Ex: Poor or Below Average)
- Value – Shows the value given to that score (Ex: 1 or 2)
- Peer Average – Displays the peer average for that question



The screenshot shows the 'Problems' tab for a resident named Norman Lord. The header includes a profile picture, name, and statistics: 'Evaluated 9 times' and 'Has completed 11 evaluations'. Below the header is a navigation bar with tabs: Overall, Tags, Comments, Subcompetency, Milestones, Competency, Problems (selected), Compliance, and Exportable Data. A filter dropdown is set to '07/01/2014 - 06/30/2015'. The main content area is titled 'Questions receiving low scores:' and contains a table with columns: Faculty Evaluation of Resident, Post Graduate Year, Submitted on, Score, Value, and Peer Average. The table lists four instances of 'Takes vital signs of patient' for '1st Year in Residency', all with a score of 2 and a value of 2. The peer average for all these questions is 3.41. At the bottom, there is a section for 'Questions Scoring below 25%' which states 'No data found for this reporting period'.

Faculty Evaluation of Resident	Post Graduate Year	Submitted on	Score	Value	Peer Average
Takes vital signs of patient	1st Year in Residency	2/19/2015 4:06:45 PM	2	2	3.41
Takes vital signs of patient	1st Year in Residency	2/19/2015 1:12:01 PM	2	2	3.41
Takes vital signs of patient	1st Year in Residency	2/19/2015 1:16:54 PM	2	2	3.41
Takes vital signs of patient	1st Year in Residency	2/19/2015 1:10:35 PM	2	2	3.41

## Compliance Report

This report displays information about the compliance rate of the resident for completing evaluations assigned to them. Evaluations are included if:

- The End Date of the match falls within the date range of the report
- The Due Date is in the past

Generate the Compliance Report:

- Go to Evaluations > Reports
- Select a Resident
- Click the Compliance tab

Columns include the following data:

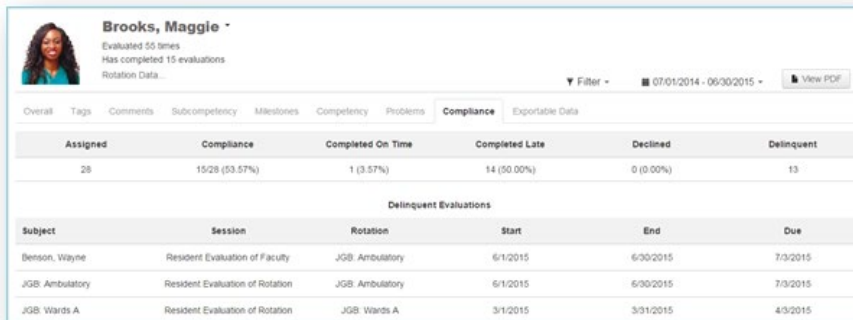
- Assigned - The total number of evaluations assigned to the resident that have a Due Date between the date range of the report
- Compliance - The number of completed evaluation, the number of assigned evaluations and the percentage of completed evaluations is shown
- Calculations - The number of evaluations that were completed divided by the total number of assigned evaluations
- Example - A resident has 50 evaluations assigned to her with Due Dates in the past. She completed 36 on time and 4 of them late (past the Due Date). Forty completed evaluations divided by 50 assigned equals 80%. Her Compliance column would display 40/50 (80%).
- Completed on Time - The number and percentage of evaluations that were completed on time (by midnight on the Due Date)
- Calculations - The number of evaluations that were completed on time divided by the total number of assigned evaluations
- Example - A resident has 50 evaluations assigned to her with Due Dates in the past. She completed 36 on time and 4 of them late (past the Due Date). Her 'Completed on Time' column would display 36/50 (72%).
- Completed Late - The number and percentage of evaluations completed late (after midnight on the Due Date)
- Calculations - The number of evaluations that were completed late divided by the total number of assigned evaluations
- Example - A resident has 50 evaluations assigned to her with Due Dates in the past. She completed 36 on time and 4 of them late (past the Due Date). Four evaluations completed late divided by 50 assigned equals 8%. Her 'Completed Late' column would display 4/50 (8%).
- Declined - The number and percentage of evaluations returned by the resident as NET (Not Enough Time spent to evaluate the subject)

Delinquent - The number of evaluations assigned to the resident that are currently delinquent (past the Due Date). These are shown in the list below.

- Delinquent Evaluations - The information shown on the second half of the screen includes details about the evaluations that are currently delinquent (past their Due Date).
- Subject - The person or rotation to be evaluated
- Session - The name of the session distributing the evaluation
- Rotation - The name of the rotation for that evaluation



- Start - The Start Date of the interval
- End - The End Date of the interval
- Due - The Due Date for the evaluation to be completed



**Brooks, Maggie**  
Evaluated 55 times  
Has completed 15 evaluations  
Rotation Data

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

Assigned	Compliance	Completed On Time	Completed Late	Declined	Delinquent
28	15/28 (53.57%)	1 (3.57%)	14 (50.00%)	0 (0.00%)	13

**Delinquent Evaluations**

Subject	Session	Rotation	Start	End	Due
Benson, Wayne	Resident Evaluation of Faculty	JGB Ambulatory	6/1/2015	6/30/2015	7/3/2015
JGB Ambulatory	Resident Evaluation of Rotation	JGB Ambulatory	6/1/2015	6/30/2015	7/3/2015
JGB Wards A	Resident Evaluation of Rotation	JGB Wards A	3/1/2015	3/31/2015	4/3/2015

## Exportable Data

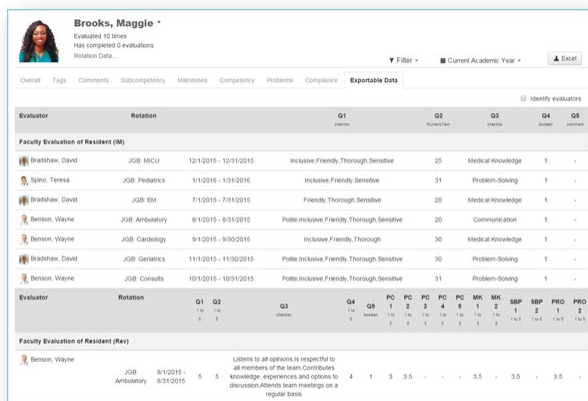
This report displays the actual scores given to each resident by each evaluator. If subcompetencies were dynamically added to the evaluation based on the rotation, these scores will also be shown. If the resident was evaluated 12 times, the scores from all twelve evaluations will be displayed. No calculations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

Generate the Scores Report:

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

This report displays the following information for each form:

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



**Brooks, Maggie**  
Evaluated 10 times  
Has completed 0 evaluations  
Rotation Data

Filter: Current Academic Year Excel

Overall Tags Comments Subcompetency Milestones Competency Problems Compliance **Exportable Data** Identify evaluators

Evaluator	Rotation	Q1	Q2	Q3	Q4	Q5
		1-5	1-5	1-5	1-5	1-5
<b>Faculty Evaluation of Resident (MF)</b>						
Brashers, David	JGB MICU 12/1/2015 - 12/31/2015	Inclusive, Friendly, Thorough, Sensitive	25	Medical Knowledge	1	-
Wynn, Teresa	JGB Pediatrics 1/1/2016 - 1/31/2016	Inclusive, Friendly, Sensitive	31	Problem-Solving	1	-
Brashers, David	JGB EM 7/1/2015 - 7/31/2015	Friendly, Thorough, Sensitive	20	Medical Knowledge	1	-
Benson, Wayne	JGB Ambulatory 8/1/2015 - 8/31/2015	Polite, Inclusive, Friendly, Thorough, Sensitive	20	Communication	1	-
Benson, Wayne	JGB Cardiology 9/1/2015 - 9/30/2015	Inclusive, Friendly, Thorough	30	Medical Knowledge	1	-
Brashers, David	JGB Geriatrics 11/1/2015 - 11/30/2015	Polite, Inclusive, Friendly, Thorough, Sensitive	30	Problem-Solving	1	-
Benson, Wayne	JGB Consults 10/1/2015 - 10/31/2015	Polite, Inclusive, Friendly, Thorough, Sensitive	31	Problem-Solving	1	-
<b>Faculty Evaluation of Resident (RF)</b>						
Benson, Wayne	JGB Ambulatory 8/1/2015 - 8/31/2015	Listens to all opinions, is respectful to all members of the team, contributes knowledge, experiences and options to discussion, attends team meetings on a regular basis.				

## Reporting on Evaluations of Rotations

For more information about evaluations reports go to [Help>Tutorial Videos>Evaluations \[8.32\] Evaluations- Reports-Rotations](#)

These rotation reports show evaluation results submitted by your residents and fellows about their rotation experience.

1. Go to Evaluations > Reports
2. If you have access to more than one program, select a program from the dropdown list
3. Click the **Rotations** tab
4. Select Performance or Overview
  - **Performance** displays rotations that were included in your sessions, including rotations from outside departments.  
You'll see:
    - Rotation names
    - Number of times each rotation has been evaluated
    - Number of rotation evaluations distributed but not yet completed (Shown in parentheses)
    - Number of low scores received, as configured by Low Score notifications on grade scales or questions

← GME Family Medicine ▾	
Residents	Rotating Residents
Faculty	Other Personnel
Rotations	▼ Filter ▾
Performance ▾	📅 Current Academic Year
Name	Evaluated
DM:IM:WOMEN'S HEALTH	3 (2 incomplete)
EM:EM:Red	5 (1 incomplete)
FM:AmbGyn-SC	14 (1 incomplete)
FM:Card-SC	11 (1 incomplete)
FM:Card-VA	10 (2 incomplete)
FM:ComMed-SC	10 (1 incomplete)
FM:Derm-SC	14 (0 incomplete)

- **Overview** shows responses to questions about rotations.  
You can toggle these options

☐ Outside Rotations
 ☒ Comments
 ☐ Scoring Details
 ☐ Identify evaluators

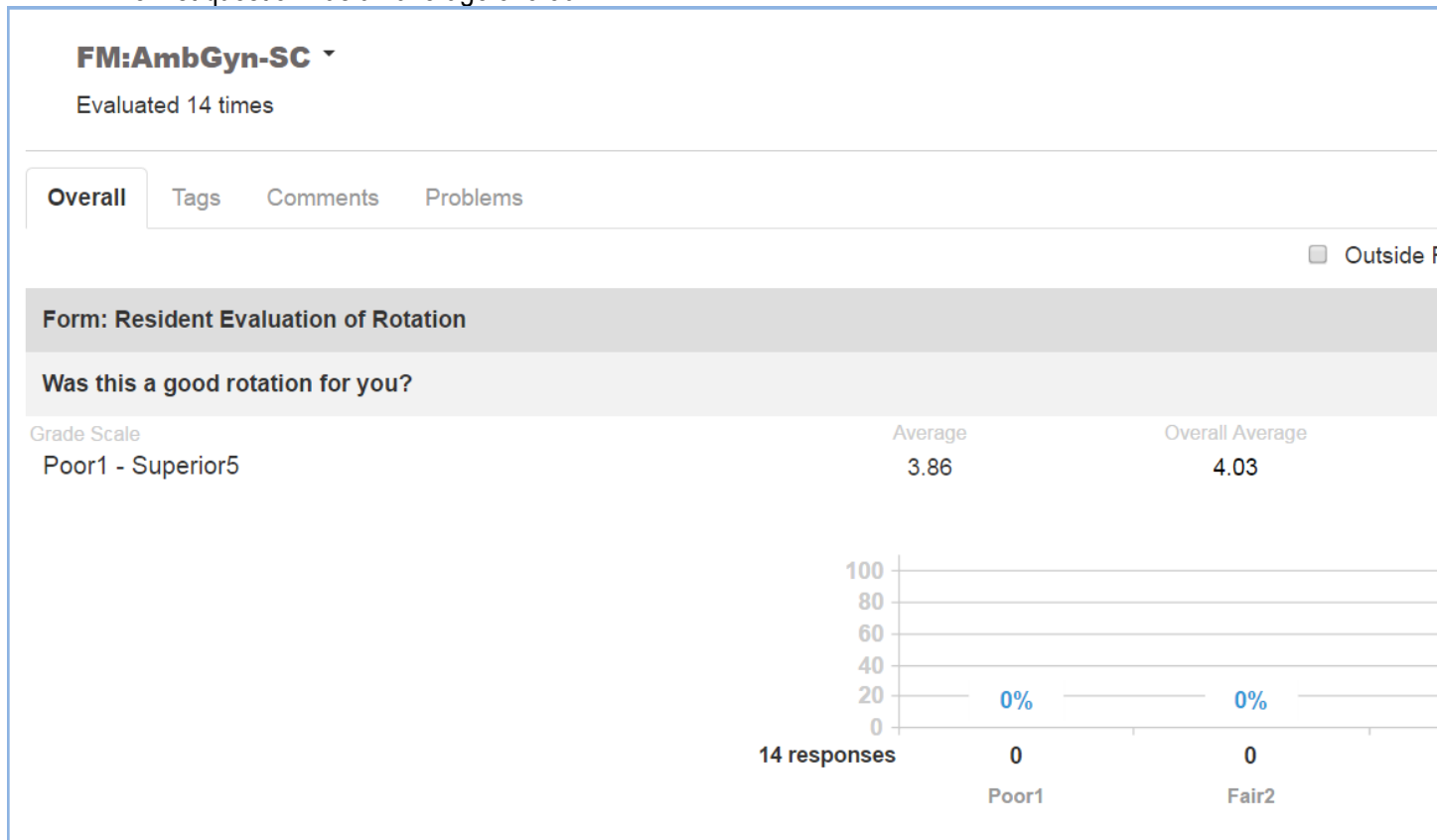
- **Outside Rotations:** Overall Average will include outside rotations evaluated by this department
- **Comments:** Include comments on the report
- **Scoring Details:** Include a graph of responses
- **Identify Evaluators:** Display the names of evaluators

5. You can click on any rotation to drill into its results

## Reading the report

In the screenshot below:

- Scoring Details are shown
- The MICU rotation was evaluated 14 times
- The first question has an average of 3.86



## Rotating Residents Reports

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

A person appears on the Rotating Residents tab if they meet all of these criteria:

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

There are two program-level reports under the Rotating Residents tab:

- Performance
- Competency





### Performance Report

The program-level Performance Report provides an overview of the performance data collected about all rotating residents. This screen only displays evaluation data that originated from sessions in your department.

1. Go to Evaluations > Reports
2. Click the Rotating Residents tab
3. By default, you'll be on the Performance tab

The following information is displayed:





- Name - Residents' names and pictures
- Evaluated:
  - Number of times each resident has been evaluated
  - Number of evaluations distributed but not yet completed (Shown in parentheses)
- Low Scores - Number of low scores received, as configured by Low Score notifications

Residents	Rotating Residents	Faculty	Other Personnel	Rotations	▼ Filter ▼	📅 Current Academic Year ▼
Performance ▼						
Name					Evaluated	
	Blind, Harold				1 (0 incomplete)	
	Cirelli, Samantha				1 (0 incomplete)	
	Flack, Geneva				1 (0 incomplete)	
	Jones, Robert				16 (2 incomplete)	

## Competency Report

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

1. Go to Evaluations > Reports
2. Click on the Rotating Residents tab
3. Click the arrow beside Performance
4. Select Competency

Residents <b>Rotating Residents</b> Faculty   Other Personnel   Rotations   ▼ Filter   ■ Current Academic Year ▼						
Competency ▼						
Name	PC	MK	PBLI	ICS	PRO	SB
 Blind, Harold	90.00%	90.00%	90.00%	90.00%	90.00%	90.00%
 Cirelli, Samantha	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%
 Flack, Geneva	20.00%	20.00%	20.00%	20.00%	20.00%	20.00%
 Jones, Robert	N/A	N/A	97.66%	95.00%	N/A	N/A

## Individual Reports

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

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

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

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

## Overall Report

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

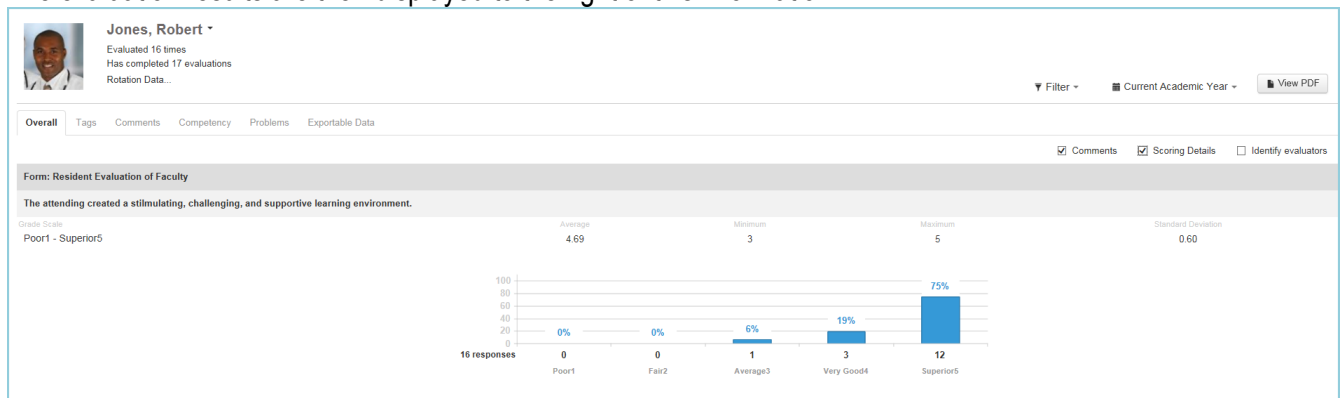
Generate the Overall Report:

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

The first column on the Overall Report:

- Displays the Name of the evaluation form
- Shows the question text
- Average - Displays the average score the resident received on each question.
- Indicates the grade scale used
- Displays evaluator comments

The evaluation results are then displayed to the right of this information.



## Tags Reports

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

- Tag by Grade Scale
- Tag by Question

Generate the Tags Report:

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

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

**Perez, Kelli**  
Evaluated 1 times  
Has completed 0 evaluations  
Rotation Data...

▼ Filter - ■ Current Academic Year - View PDF

Overall Tags Comments Competency Problems Exportable Data

Tag by Grade Scale Tag by Question

Comments Scoring Details Identify evaluations

**Tag: Professional Behavior**  
Poor - Excellent

Average	Peer Average	Minimum	Maximum	Standard Deviation
4.33	N/A	4	5	0.58

Lists to all opinions - Attends team meetings on a reg...

Peer Average: 4.33  
Attends team meetings on a regular basis  
Show all top choices

Peer Deviation: 100%

**Tag: Overall**  
Yes/No

Average	Peer Average	Minimum	Maximum	Standard Deviation
1	N/A	N/A	N/A	N/A

**Tag: Patient Caring**  
Poor - Excellent

Average	Peer Average	Minimum	Maximum	Standard Deviation
4.33	N/A	4	5	0.58

**Tag: Clinical Practice**  
Poor - Excellent

Average	Peer Average	Minimum	Maximum	Standard Deviation
4.33	N/A	4	5	0.58

**David Bradshaw** 1/18/2016 10:42:26 AM  
Good member of House Team!

## Comments Report

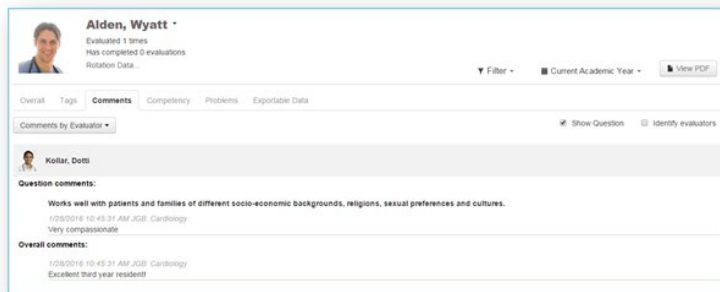
There are four reports that can be generated to show the evaluators' comments about your rotating residents. These reports allow the comments to be grouped according to Evaluator, Rotation, Tag or Evaluation Form.

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

Generate the Comments Report:

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

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



## Competency Report

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

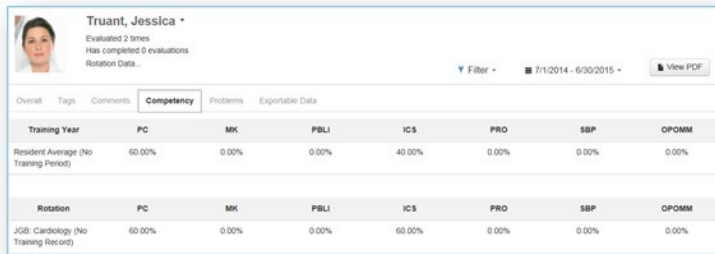
The results are:

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

Generate the Competency Report:

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





Training Year	PC	MK	PBLI	ICS	PRO	SBP	OPMM
Resident Average (No Training Period)	60.00%	0.00%	0.00%	40.00%	0.00%	0.00%	0.00%

Rotation	PC	MK	PBLI	ICS	PRO	SBP	OPMM
JOB: Cardiology (No Training Record)	60.00%	0.00%	0.00%	60.00%	0.00%	0.00%	0.00%

## Problems Report

The Problems Report has two sections:

Questions receiving low scores:

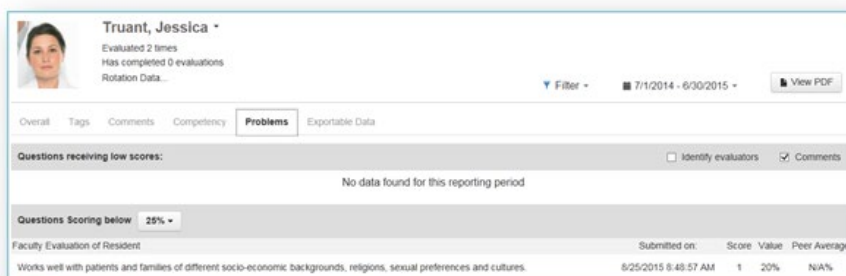
- Resident receives a low score on a specific question on an evaluation form flagged to give Low Score notifications
- Resident receives a low score on a specific grade scale, on any form, flagged to give Low Score notifications.

Questions scoring below a certain percentage:

- Defaults to questions scored in the bottom 25% of the grade scale
- Can be changed to 10%, 15%, 20% or Suppressed to 0%

Generate the Problems Report:

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



Faculty Evaluation of Resident	Submitted on	Score	Value	Peer Average
Works well with patients and families of different socio-economic backgrounds, religions, sexual preferences and cultures.	8/25/2015 8:48:57 AM	1	20%	N/A%

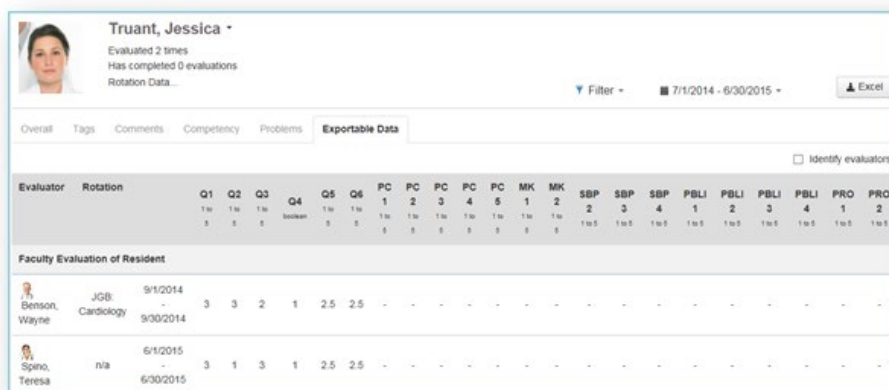
## Exportable Data

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

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

Generate the Scores Report:

1. Go to Evaluations > Reports
2. By default, you'll land on the Rotating Residents tab
3. Click a resident's name
4. Click the Scores tab
5. Click Excel to export the data to a spreadsheet format



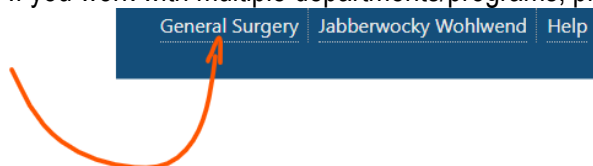
Evaluator	Rotation	Q1	Q2	Q3	Q4	Q5	Q6	PC	PC	PC	PC	PC	MK	MK	SBP	SBP	SBP	PBLI	PBLI	PBLI	PBLI	PRO	PRO
Benson, Wayne	JOB: Cardiology	3	3	2	1	2.5	2.5	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Spino, Teresa	n/a	3	1	3	1	2.5	2.5	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-

## Extracting Evaluation Data as Excel or TAB Files

You can extract evaluation forms and results to XLS or TAB files.

These exports can give you more control to manipulate the data and customize reporting.

1. If you work with multiple departments/programs, pick the one with the data you want to extract



2. Go to Evaluations > Under Tools: Data Extract
  3. Select an academic year or date range for the extract
  4. Select a radio button for the evaluation to include:
    - Use Session Interval Start Date
    - Use Completed date of evaluation
  5. Select the Type of Form: Standard (meaning evaluations of learners/faculty or rotations) or Program
  6. Select the evaluation form
- If you don't see the form you're looking for you can:
- Check **Include Archived** to select from archived forms

- Check **Include Division Evaluation Forms** to also see forms from any divisions within your department  
*This works if you are logged into a department with divisions tied directly to it*
  - Change program/department in the picker at the top of the page and navigate back to Data Extract
7. Select the fields to include in the extract (for Results extracts)  
*Click Select All if you want to check all boxes*

Evaluation Data Extract

**Date Information**

Filter by Year: 2015-2016 ---

Start Date: 7/1/2015

End Date: 6/30/2016

☒ Use Session Interval Start Date ☐ Use Completed date of evaluation

**Evaluation Form**

Standard Program

---

☐ Include Archived Evaluation Forms

☐ Include Division Evaluation Forms

**Field Selection**

Select all

<input checked="" type="checkbox"/> Session Date	<input checked="" type="checkbox"/> Subject Name	<input checked="" type="checkbox"/> Question ID
<input type="checkbox"/> Session	<input type="checkbox"/> Subject Status	<input type="checkbox"/> Question
<input type="checkbox"/> Evaluation Start Date	<input type="checkbox"/> Subject Department	<input checked="" type="checkbox"/> Tags
<input type="checkbox"/> Evaluation End Date	<input checked="" type="checkbox"/> Subject Rotation	<input type="checkbox"/> Competency
<input checked="" type="checkbox"/> Date Completed	<input type="checkbox"/> Evaluation Form	<input checked="" type="checkbox"/> Response
<input checked="" type="checkbox"/> Evaluator Name	<input checked="" type="checkbox"/> Overall Comments	<input checked="" type="checkbox"/> Question Comment
<input checked="" type="checkbox"/> Evaluator Status	<input checked="" type="checkbox"/> Subject Comments	<input checked="" type="checkbox"/> Drop Down Lists
<input type="checkbox"/> Evaluator Department		

Generate Reports to TAB files Generate Results to Excel file Generate Form to Excel file

**Reminders**

- When exporting to Excel, any comments exceeding 256 characters that are to be exported will be truncated to 256 characters in the export file.
- When exporting to a tab-delimited file, any comments exceeding 7,000 characters that are to be exported will be truncated to 7,000 characters in the export file.
- Any comments that are truncated in the export file can be viewed in full by using any of the evaluation reports that incorporate comments.

8. Select a report format at the bottom of the page

Generate Results to TAB file Generate Form to TAB file Generate Results to Excel file Ge

## TAB (Tab-Delimited) file

- a) Click Generate Reports to TAB files
- b) Click OK to the pop-up screen
- c) Click one of these two links:
  - Evaluations. Tab - Responses extracted to tab-delimited file
  - Evaluation form. Tab - Evaluation form extracted to tab-delimited file

## Excel File

- a) Click one of the following:
    - Generate Results to Excel file - Data includes responses and comments from the form
    - Generate Form to Excel file - Data includes items from the evaluation form, like the Question ID, Category and Question
9. Click File > Save As and save to your computer  
having trouble with your extract? Try holding down the Ctrl key when you click Save

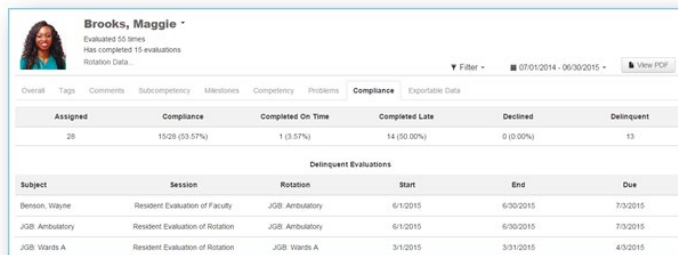
## Access/Privileges

You need an L5 or L6 in Evaluations for any department where you'd like to extract evaluation data

## **Evaluation Compliance Report on Residents**

This report displays information about the compliance rate of the resident for completing evaluations assigned to them. Evaluations are included if:

- The End Date of the match falls within the date range of the report
- The Due Date is in the past



<b>Brooks, Maggie</b>		Evaluated 55 times Has completed 15 evaluations Rotation Data		Filter	07/01/2014 - 06/30/2015	View PDF
Overall	Tags	Comments	Subcompetency	Milestones	Competency	Problems
<b>Assigned</b>		<b>Compliance</b>	<b>Completed On Time</b>	<b>Completed Late</b>	<b>Declined</b>	<b>Delinquent</b>
28		15/28 (53.57%)	1 (3.57%)	14 (50.00%)	0 (0.00%)	13
<b>Delinquent Evaluations</b>						
Subject	Session	Rotation	Start	End	Due	
Benson, Wayne	Resident Evaluation of Faculty	JGB Ambulatory	6/1/2015	6/30/2015	7/3/2015	
JGB Ambulatory	Resident Evaluation of Rotation	JGB Ambulatory	6/1/2015	6/30/2015	7/3/2015	
JGB Wards A	Resident Evaluation of Rotation	JGB Wards A	3/1/2015	3/31/2015	4/3/2015	

## Generate the Compliance Report

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

Columns include:

**Assigned** - The total number of evaluations assigned to the resident that have a Due Date between the date ranges of the report

**Compliance** - The number of completed evaluation, the number of assigned evaluations and the percentage of completed evaluations is shown

**Calculations** - The number of evaluations that were completed divided by the total number of assigned evaluations

- Example - A resident has 50 evaluations assigned to her with Due Dates in the past. She completed 36 on time and 4 of them late (past the Due Date). Forty completed evaluations divided by 50 assigned equals 80%. Her Compliance column would display 40/50 (80%).

**Completed on Time** - The number and percentage of evaluations that were completed on time (by midnight on the Due Date)

**Calculations** - The number of evaluations that were completed on time divided by the total number of assigned evaluations

- Example - A resident has 50 evaluations assigned to her with Due Dates in the past. She completed 36 on time and 4 of them late (past the Due Date). Her 'Completed on Time' column would display 36/50 (72%).

**Completed Late** - The number and percentage of evaluations completed late (after midnight on the Due Date)

**Calculations** - The number of evaluations that were completed late divided by the total number of assigned evaluations

- Example - A resident has 50 evaluations assigned to her with Due Dates in the past. She completed 36 on time and 4 of them late (past the Due Date). Four evaluations completed late divided by 50 assigned equals 8%. Her 'Completed Late' column would display 4/50 (8%).

**Declined** - The number and percentage of evaluations returned by the resident has Declined

**Delinquent** - The number of evaluations assigned to the resident that are currently delinquent (past the Due Date). These are shown in the list below.

### Delinquent Evaluations

The information shown on the second half of the screen includes details about the evaluations that are currently delinquent (past their Due Date):

- Subject - The person or rotation to be evaluated
- Session - The name of the session distributing the evaluation
- Rotation - The name of the rotation for that evaluation
- Start - The Start Date of the interval
- End - The End Date of the interval
- Due - The Due Date for the evaluation to be completed

## Evaluation Reports - Other Personnel

For more information about evaluations reports go to [Help>Tutorial Videos>Evaluations \[8.34\]](#)  
[Evaluations- Reports-Other Personnel](#)

The 'Other Personnel' tab displays evaluation information under two sections:

- **Residents in this program with no Training Record**  
Go to Personnel > Personnel Records and create a Training Record for any resident listed here. Their evaluation results will then appear on the 'Residents' tab.
- **Other evaluated people in this department** - This list includes all people who have a Work Role other than Faculty or Resident, such as Nurse or Other.

You have two report options:

- Performance Report
- Competency Report

### Performance Report

The Performance Report provides an overview of the performance data collected on all "other personnel." This screen only displays evaluation data that originated from your department.

1. Go to Evaluations > Reports
2. Click the Other Personnel tab
3. By default, you'll be on the Performance tab

The report contains:

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

### Competency Report

1. Go to Evaluations > Reports
2. Click the Other Personnel tab
3. By default, you'll be on the Performance tab
4. Click the arrow beside Performance and select Competency

The report contains:

- Name and picture of the person
- Their overall averages on the core competencies. Results are from General questions (in your own words) that use a Rating grade scale and have been tagged to a Core Competency.

### Individual Reports

Performance Reports provide detailed evaluation information collected on a specific person. Click on a person's name to view their reports.

## Overall Report

The Overall Report shows the results from every question on every form that was used to evaluate the person. The default time frame is the current academic year. Comments are displayed by default.

The columns on the Overall Report include:

- Name of the evaluation form
- Question - Shows the actual question text
- Grade scale used

Average - Displays the average score the person received on each question.

Minimum - Displays the lowest score given to the person.

Maximum - Shows the highest score given to the person.

Standard Deviation - Displays the variation or dispersion of the results from the average score.

1. Generate the Summary Report:
2. Go to Evaluations > Reports
3. Click the Other Personnel tab
4. Select a Person
5. By default, you'll be on the Summary tab
6. Check the box for Scoring Details to view a graphic display of the results. The number of responses given is shown under each level of the grade scale. The graphic for Yes/No questions differs from the multiple choice grade scale.

## Tags Reports

The Tags Report displays the results from Custom Tags placed on General questions (in your own words).

The data can be grouped under two formats:

- Tag by Grade Scale
- Tag by Question

Generate the 'Tag by Grade Scale' Report:

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

## Comments Report

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

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

Generate the Comments Report:

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

## Competency Report

The Competency Report displays data collected about the person from Custom questions (in your own words) that use a Rating grade scale and have been tagged to a Core Competency. The results are:

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

Generate the Competency Report:

1. Go to Evaluations > Reports
2. Click the Other Personnel tab
3. Click a person's name
4. Click the Competency tab



## **Problems Report**

The Problems Report has two sections:

Questions receiving low scores:

Person receives a low score on a specific question on a form flagged to give Low Score notifications

Person receives a low score on a specific grade scale, on any form, flagged to give Low Score notifications

Questions scoring below a certain percentage:

Defaults to questions scored in the bottom 25% of the grade scale

Can be changed to 10%, 15%, 20% or Suppressed to 0%

Generate the Problems Report:

1. Go to Evaluations > Reports
2. Click the Other Personnel tab
3. Click a person's name
4. Click the Problems tab

## **Exportable Data**

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

Generate the Scores Report:

1. Go to Evaluations > Reports
2. Click the Other Personnel tab
3. Click a person's name
4. Click the Exportable Data tab
- 5.
6. Click Excel to export the data to a spreadsheet-style format

## GME & Program Level Faculty Evaluation Reports

The Evaluation Reports display evaluation information collected on your faculty members. The reports use the end date of the match to determine if the results are included. If the end date of the match falls within the date range of the report, it will be included.

### GME Level Reports

1. Go to Evaluations > Reports
2. Choose a view from the sponsor dropdown:
  - Select a principal sponsor for a global view of the evaluation information for the programs linked to that principal sponsor
  - Select Others to view all programs not linked to a principal sponsor

Most of the information in this chart is about the residents, but there is one column about Faculty Compliance.

Faculty Compliance - Percentage of completed evaluations where the evaluator had a Work Role of Faculty and the subject had a Work Role of Resident

Example: Faculty Evaluation of Resident and Faculty Evaluation of Fellow. (Includes on-demand evaluations)

Note: This figure may not match the calculations found on the Program-level Compliance Report. The Program-level report includes all of the faculty member's evaluations (residents, peers, program), not just those completed on residents/fellows.

### ***Other actions you can take***

- Click on a Program to view the data for that program
- Click Filter to edit the parameters of the report
- By default, the data gathered is from the current academic year. To change the date range, select Custom, enter the dates and click Apply.
- Click View PDF to print the report

## Evaluation Reporting

St. Christopher Medical Center ▾

Evaluations of Residents:

📅 Current Academic Year ▾

Program	Resident Count	Unmatched Residents	Distributed	Completed / Overall Compliance	Faculty Compliance	On Time	Late	Declined	Incomplete
Anesthesiology	2	2	0	0 (0%)	0%	0	0	0	0 (0%)
Cardiovascular Disease	1	1	0	0 (0%)	0%	0	0	0	0 (0%)
Emergency Medicine	30	2	1020	106 (10.39%)	8.84%	31	44	31	914 (89.61%)
Endocrinology	5	5	0	0 (0%)	0%	0	0	0	0 (0%)
Family Medicine	10	0	390	40 (10.26%)	17.73%	6	31	3	350 (89.74%)

### Program Level Reports

Click on a Program to view the data for that program. Click the Faculty tab. There are two program-level reports available to view results for evaluations of faculty: Performance and Compliance.

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

1. The Faculty's Personnel record is in the Program's Department.
2. The Faculty is the subject of a match in a session that is in the program's department and is for the report's date range.
3. The Faculty is the evaluator for a completed match in a session that is in the program's department and is for the report's date range.

### Performance Report

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

Grouped by:

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





## Outside Faculty

- Personnel record resides in another Department/Division
- Name - Picture and Faculty name is displayed
- Evaluated
  - Number of times they have been evaluated
  - Number of evaluations distributed where they are the subject that have not been completed (in parentheses)
- Low Scores - Number of low scores received, as configured on your questions or grade scales

Generate the Performance Report:

1. Go to Evaluations > Reports
2. Select the Program
3. Click on the Faculty tab
4. The page defaults to the Performance Report

The screenshot shows a web application interface for 'JGB Internal Medicine'. At the top, there's a navigation bar with a 'GME' logo and a search box labeled 'Search name'. Below this is a tabbed interface with 'Residents', 'Rotating Residents', 'Faculty' (selected), 'Other Personnel', and 'Rotations'. To the right of the tabs are a 'Filter' dropdown and a date range '07/01/2014 - 06/30/2015'. A 'View' button is also present. Below the tabs is a 'Performance' dropdown menu. The main content area is a table with three columns: 'Name', 'Evaluated', and 'Low Scores'. The table lists four faculty members: Benson, Wayne; Boarman, Lou F; Bob, Billy; and Bradshaw, David. Each row includes a small profile picture, the name, the number of evaluations (with incomplete ones in parentheses), and the number of low scores.

Name	Evaluated	Low Scores
 Benson, Wayne	3 (28 incomplete)	
 Boarman, Lou F	0 (0 incomplete)	
 Bob, Billy	0 (0 incomplete)	
 Bradshaw, David	4 (27 incomplete)	2 low scores

## Compliance Report

The Compliance Report displays information for evaluations that were assigned to a faculty member and are past their due date. The criteria that makes someone show up in the Faculty list are:

1. The Faculty's demographics record is in the Program's Department.
2. The Faculty is the subject of a match in a session that is in the program's department and is for the report's date range.
3. The Faculty is the evaluator for a completed match in a session that is in the program's department and is for the report's date range.

For the data to be included on this report:

- The End Date of the match must fall within the date range of the report
- The Due Date is in the past

This report shows the following data:

- Name - The names and pictures of the faculty members are shown
- Assigned - The number of evaluations assigned to the faculty for the time period of the report
- Compliance - The number of completed evaluations divided by the number of evaluations assigned; the percentage of evaluations that have been completed is shown in parentheses. (Includes on-demand evaluations) Note: This figure may not match the calculations found on the GME-level report, Faculty Compliance column. The GME report only shows the compliance rate for evaluations completed on residents/fellows, whereas the program-level Compliance Report includes all of the evaluations completed by the faculty member (on residents, peers, program).
- 14 Day Compliance - The number of completed evaluations within 14 days of the end of the rotation divided by the number of assigned evaluations; in parentheses, the percentage of evaluations that have been completed by the faculty member within 14 days of the end of the rotation is displayed. The name of the Rotation must be listed in the match to be included in this calculation. This section was introduced in order to satisfy a web ADS question that asks each program: "What percentage of the faculty complete written evaluations of residents within 2 weeks following each rotation or educational experience?" (See more details below.)
- Completed On Time - The number and percentage of evaluations that were completed before the Due Date
- Completed Late - The number and percentage of evaluations that were completed after the Due Date
- Declined - The number and percentage of evaluations that were returned (declined) by the faculty member
- Delinquent - The number of evaluations assigned to the faculty member for the date range of the report that are currently past their Due Date

#### Notes about 14-Day Compliance

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

#### Generate the Compliance Report:

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

## Evaluation Reporting



Family Medicine ▾

Residents

Rotating Residents

**Faculty**

Other Personnel

Rotations

▼ Filter ▾

📅 07/01/2015 - 06/30/2016

Compliance ▾

	Name	Assigned	Compliance	14 Day Compliance	Completed on Time	Completed
<b>Core Faculty</b> ▲						
	Black, James	0	-	N/A	-	
	Antonucci, Michael	29	15/29 (51.72%)	1/16 (6.25%)	2 (6.90%)	13 (44.83%)
	Beres, Amanda	0	-	N/A	-	
	Matthews, Kathy	3	3/3 (100.00%)	N/A	0 (0.00%)	3 (100.00%)
	Miller, Jerry	3	1/3 (33.33%)	0/3 (0.00%)	0 (0.00%)	1 (33.33%)
<b>Core Faculty Total</b>		<b>35</b>	<b>19/35 (54.29%)</b>	<b>1/19 (5.26%)</b>	<b>2 (5.71%)</b>	<b>17 (44.44%)</b>
<b>Department Faculty</b> ▲						
	Schmidt, Denise	1	0/1 (0.00%)	N/A	0 (0.00%)	0 (0.00%)
	Andersen, Harry J	0	-	N/A	-	
	Motts, Frank J	9	1/9 (11.11%)	0/1 (0.00%)	0 (0.00%)	1 (11.11%)
<b>Department Faculty Total</b>		<b>10</b>	<b>1/10 (10.00%)</b>	<b>0/1 (0.00%)</b>	<b>0 (0.00%)</b>	<b>1 (10.00%)</b>
<b>Total:</b>		<b>45</b>	<b>20/45 (44.44%)</b>	<b>1/20 (5.00%)</b>	<b>2 (4.44%)</b>	<b>18 (44.44%)</b>

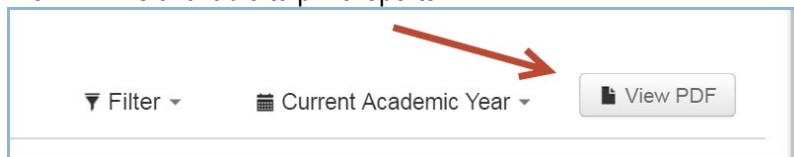
### **Grouped Results**

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

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

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

View PDF is available to print reports:



Click the button, then make choices on people and reports to print. Then click View PDF.

The screenshot shows a dialog box titled "Generate report(s) for:". It has a section for selecting people with a checked box for "August, Daniel S" and a "Select All" link. Below this is a list of other names: "Antonucci, Michael", "Beres, Amanda", "Carmichael, Christopher", and "Dillard, Maximus", each with an unchecked checkbox. There is a scrollbar on the right. Below the names is a section titled "Include tabs: All" with a grid of checkboxes for various report tabs: "Overall", "Grading Profile", "Tag by Grade Scale", "Tag by Question", "Comments by Evaluator", "Comments by Rotation", "Comments by Tag", "Comments by Form", "Problems", and "Compliance". The "Compliance" checkbox is checked. At the bottom are two buttons: "View PDF" (blue) and "Close Window".

Generate report(s) for:

☒ August, Daniel S

Select All

☐ Antonucci, Michael

☐ Beres, Amanda

☐ Carmichael, Christopher

☐ Dillard, Maximus

—

Include tabs: All

☐ Overall ☐ Comments by Evaluator ☐ Problems

☐ Grading Profile ☐ Comments by Rotation ☒ Compliance

☐ Tag by Grade Scale ☐ Comments by Tag

☐ Tag by Question ☐ Comments by Form

View PDF Close Window

Delinquent Evaluations

## Individual Faculty Evaluation Reports

For more information about evaluations reports go to [Help>Tutorial Videos>Evaluations \[8.31\] Evaluations- Reports-Faculty](#)

View the evaluation data collected on your faculty members with these individual reports.

1. Go to Evaluations > Reports
2. Click on the **Program dropdown arrow** to select a program if you have access to multiple

Evaluation Reporting

The screenshot shows the "Evaluation Reporting" interface. At the top is a "GME" button with a left arrow and a dropdown menu showing "Pediatrics NIT" with a red arrow pointing to the dropdown arrow. Below this are three tabs: "Residents", "Rotating Residents", and "Faculty" (which is selected). At the bottom is a "Performance" dropdown menu.

GME Pediatrics NIT


Residents Rotating Residents Faculty

Performance

3. Click the **Faculty** tab



- Click an individual faculty member's name  
You land on the overall report for the faculty



**Jones, Robert** ▾  
Evaluated 2 times  
Has completed 3 evaluations  
Rotation Data...

- The faculty member's name and photo appear at the top left of the report, along with:
  - Total number of times this faculty has been evaluated for the date range of the report
  - Total number of evaluations completed by this faculty during the date range of the report
  - Hover over **Rotation Data** to view the list of rotations appearing on completed evaluations for the time span of the report
- Below, you see a summary by form showing the average score the faculty member received for each question

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

**Form: Resident Evaluation of Faculty**

**The attending created a stimulating, challenging, and supportive environment where I wanted to learn.**

Grade Scale	Average
Poor - Superior	3.50

**The quality of the teaching was:**

Grade Scale	Average
Poor - Superior	3.50

**The attending provided useful feedback during and at the end of the rotation.**

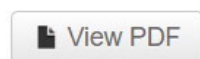
Grade Scale	Average
Strongly Disagree - Strongly Agree	3.25

**The attending went to the bedside, demonstrated physical diagnosis techniques and watched me examine patients.**

Grade Scale	Average
Frequently - Never	3.50

**The attending challenged and encouraged me to do self-directed learning.**

- To view the report, click **View PDF**



## Who's in the Faculty List?

Faculty appear if:

- Their demographics record is in the Program's Department
- The Due Date of the session where the faculty was matched falls in the past (of the date range of the report)
- The Faculty is the subject of a match (in a session) that:
  - Is in the program's department
  - Is for the report's date rangeThe End Date of the evaluation match must fall within the report's date range to be included

## Overall Report

The Faculty is the evaluator for a completed match in a session that is in the program's department

Groupings

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

Core Faculty

- Designated as Core Faculty in Administration > Program > Personnel > Faculty tab

Program Faculty

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

Department Faculty

- Personnel record resides within your Department/Division
- Not designated as faculty member in Administration

Outside Faculty

- Personnel record resides in another Department/Division

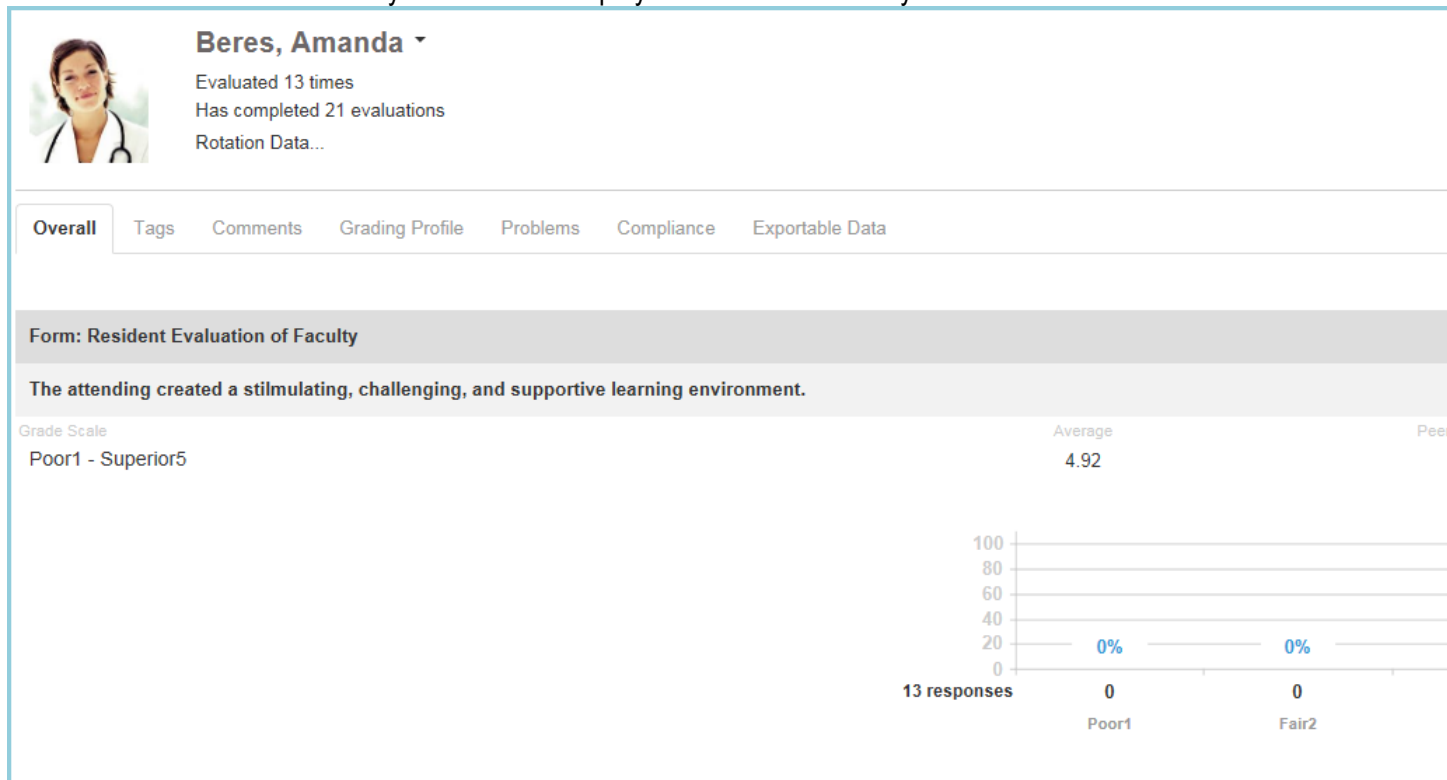
Click on a person's name to see the Overall tab

The first column of the Overall Report displays:

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

## Faculty Evaluation Reports - Other Details

- The Peer Average includes any faculty who was evaluated on that particular question. In other words, the Peer Group includes Department, Program, and Core and outside faculty members who were evaluated using the same form.
- Check the box for Scoring Details to display bar graphs for each question
- Click Filter to edit the parameters of the report
- By default, the data gathered is from the current academic year. Click Current Academic Year to change the date range of the report
- Click View PDF to print the report
- Check the box for Identify evaluators to display more details on anonymous evaluations




## Tags Report

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

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


Generate the 'Tag by Grade Scale' Report:

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

 <b>Beres, Amanda</b> ▾ Evaluated 13 times Has completed 21 evaluations Rotation Data...		
Overall	<b>Tags</b>	Comments   Grading Profile   Problems   Compliance   Exportable Data
Tag by Grade Scale   Tag by Question		
Tag: GENERAL		
Never - Frequently		
	Average	Peer Average
	3.92	3.49
Tag: PRACTICE-BASED LEARNING/IMPROVEMENT		
Never - Frequently		
	Average	Peer Average
	3.92	3.49
Tag: TEACHING SKILLS		
Poor1 - Superior5		
	Average	Peer Average
	4.96	4.26

Generate the 'Tag by Question' Report:

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



**Beres, Amanda** ▾  
 Evaluated 13 times  
 Has completed 21 evaluations  
 Rotation Data...

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

Tag by Grade Scale
 Tag by Question

**Tag: GENERAL**

The attending provided reference articles or texts on pertinent topics:

Grade Scale	Average
Never - Frequently	3.92

**Tag: PRACTICE-BASED LEARNING/IMPROVEMENT**

The attending went to the bedside, demonstrated physical diagnosis techniques and watched me examine patients.

Grade Scale	Average
Never - Frequently	3.92

The attending challenged and encouraged me to do self-directed learning.


Grade Scale	Average
Never - Frequently	3.92

## Comments Report

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

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


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



**Beres, Amanda ▾**  
 Evaluated 13 times  
 Has completed 21 evaluations  
 Rotation Data...

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

Comments by Evaluator ▾


**Anonymous**

**Overall comments:**


Outstanding teacher and advisor!

Wonderful to work with her!

## Grading Profile Report

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

- Question text for each form
- This faculty member's grading average on each question
- The average score given by their peers for each question
- Generate the Grading Profile:
  1. Go to Evaluations > Reports
  2. Select the Program
  3. Click on the Faculty tab
  4. Select a faculty member
  5. Click the Grading Profile tab



**Antonucci, Michael ▾**  
 Evaluated 11 times  
 Has completed 12 evaluations  
 Rotation Data...

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

**Form: Faculty Evaluation of Resident**

Works well with patients and families of different socio-economic backgrounds, religions, sexual preferences and cultures.


Takes vital signs of patient

Conduct a family consultation

## Problems Report

The Problems Report displays the following information:

- Displays questions receiving low scores, as configured on grade scales or questions
- Displays questions scoring below the percentage selected on the page
- Displays comments, by default
- Generate the Problems Report:
  1. Go to Evaluations > Reports
  2. Select the Program
  3. Click on the Faculty tab
  4. Select a faculty member
  5. Click the Problems tab



**Matthews, Kathy** ▾  
Evaluated 10 times  
Has completed 16 evaluations  
[Rotation Data...](#)

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

**Questions receiving low scores:**

Resident Evaluation of Faculty	Submitted on:	Score
The attending created a stimulating, challenging, and supportive learning environment.	5/26/2017 3:03:29 PM	2
The quality of the teaching was:	5/26/2017 3:03:29 PM	2

Questions Scoring below **25%** ▾

No data found for this reporting period


## Compliance Report

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

It has these columns:

- **Assigned** - The number of evaluations assigned to the faculty for the time period of the report
- **Compliance** - The number and percentage of all evaluations that have been completed. Includes all assigned evaluations and on-demand evaluations, including those on residents/fellow, peers and the program. Note: The Compliance number shown here may differ from the 'Faculty Compliance' column on the GME level report. The GME report calculates the compliance rate only for evaluations where the subject has the Work Role of Resident.
- **14 Day Compliance** - The number and percentage of evaluations that have been completed within 14 days of the end of the rotation (See more details below.)

- Completed On Time - The number and percentage of completed evaluations that were completed before the Due Date (any declined evaluations reduce this percentage)
- Completed Late - The number and percentage of completed evaluations that were completed after the Due Date
- Declined - The number and percentage of evaluations that were returned (declined) by the faculty member
- Delinquent - The number of evaluations that are currently past their Due Date
- The chart on the bottom half of the screen displays details about the evaluations that are currently delinquent



**Antonucci, Michael** ▾  
 Evaluated 0 times  
 Has completed 15 evaluations  
 Rotation Data...

[Overall](#)
[Tags](#)
[Comments](#)
[Grading Profile](#)
[Problems](#)
[Compliance](#)
[Exportable Data](#)

Assigned	Compliance	14 Day Compliance
29	15/29 (51.72%)	1/16 (6.25%)

Subject	Session	Rotation
Aktar, Aboud	Faculty Eval of Resident	FM:Ger
Aktar, Aboud	Faculty Eval of Resident	FM:Ca
Aktar, Aboud	Faculty Eval of Resident	FM:De

Generate the Compliance Report:

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







## Notes about 14-Day Compliance

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

## Generate the Exportable Data Report

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

<div><div><b>Matthews, Kathy</b> ▾ Evaluated 10 times Has completed 16 evaluations Rotation Data...</div></div>				
Overall   Tags   Comments   Grading Profile   Problems   Compliance <b>Exportable Data</b>				
Evaluator		Rotation	Q1 1 to 5	Q2 1 to 5
Resident Evaluation of Faculty				
 Anonymous		Anonymous	-	2
 Anonymous		Anonymous	-	4
 Anonymous		Anonymous	-	5


## Faculty Evaluation Compliance Report

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

It has these columns:

- Assigned - The number of evaluations assigned to the faculty for the time period of the report
- Compliance - The number and percentage of all evaluations that have been completed. Includes all assigned evaluations and on-demand evaluations, including those on residents/fellow, peers and the program. Note: The Compliance number shown here may differ from the 'Faculty Compliance' column on the GME level report. The GME report calculates the compliance rate only for evaluations where the subject has the Work Role of Resident.
- 14 Day Compliance - The number and percentage of evaluations that have been completed within 14 days of the end of the rotation (See more details below.)
- Completed On Time - The number and percentage of completed evaluations that were completed before the Due Date (any declined evaluations reduce this percentage)

- Completed Late - The number and percentage of completed evaluations that were completed after the Due Date
- Declined - The number and percentage of evaluations that were returned (declined) by the faculty member
- Delinquent - The number of evaluations that are currently past their Due Date
- The chart on the bottom half of the screen displays details about the evaluations that are currently delinquent



Antonucci, Michael

Evaluated 0 times

Has completed 15 evaluations

Rotation Data...

Overall

Tags

Comments

Grading Profile

Problems

Compliance

Exportable Data

Assigned	Compliance	14 Day Compliance	Completed On Time
29	15/29 (51.72%)	1/16 (6.25%)	2 (6.90%)

Delinquent Evaluations

Subject	Session	Rotation	Start
Aktar, Aboud	Faculty Eval of Resident	FM:Geri-PCMH	4/7/2016
Aktar, Aboud	Faculty Eval of Resident	FM:Card-SC	5/5/2016
Aktar, Aboud	Faculty Eval of Resident	FM:Derm-SC	6/2/2016

#### Generate the Compliance Report:

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

#### Notes about 14-Day Compliance

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

## Evaluation Reports - Resident View

### Overview

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

1. Go to Evaluations > Reports

Click the Overall Tab

### Overall Report

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

This report displays the following information:

- Name of the evaluation form

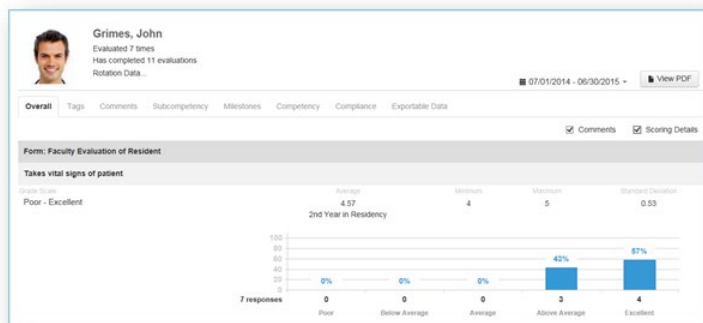
Question text

Grade scale used

Their average on that question

The Minimum and Maximum scores received, along with the Standard Deviation

Check Scoring Details to view a graphic representation of the results



### Other Reports

Residents can click on the other tabs to view more details about their evaluation results. See the details listed in the Individual Resident Reports for more information:

- Resident Evaluations - Individual Resident Reports