

New Innovations (RMS) Evaluations Report & Export 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

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

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 Individual Person's Report

1. **Go to Evaluations > Reports>By Person or Rotation**
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> By Peron or Rotation**
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 > By Person or Rotation > 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 trainee'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 trainees 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 ×

- 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

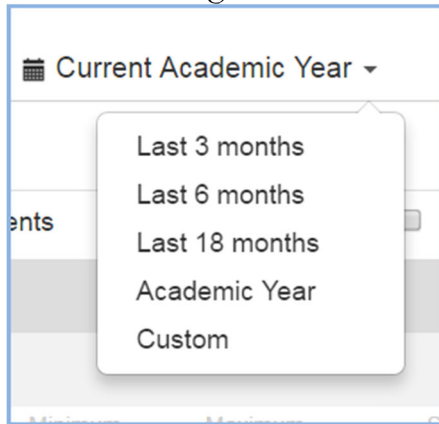
Filtering Evaluation Reports

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.

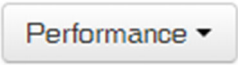
Identify Evaluators

- 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 evaluators** box to view these details.

Reporting on Resident & Fellow Evaluations

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

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

1. **Go to Evaluations > Reports>By Person or Rotation**
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 
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 trainee 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.

Name	PC	MK	PBLI	ICS	PRO	SBP	OPOMM	Overall
2nd Year in Residency								
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%
Vgnos, Cynthia	60.00%	N/A	N/A	55.56%	N/A	N/A	N/A	57.78%
3rd Year in Residency								
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.

The screenshot shows a web interface for 'Residents' with a navigation menu (Rotating Residents, Faculty, Other Personnel, Rotations), a filter dropdown, a date range (07/01/2014 - 09/30/2015), and a 'View PDF' button. Below the navigation is a 'Compliance' dropdown and a 'Group by year' checkbox. The main table displays the following data:

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

Name	PC	MK	PBL	ICS	PRO	SBP
Brooks, Maggie	PC.1, PC.2, PC.3, PC.4 3.20, 4.00, 3.94, 3.80 3.98	MK.1, MK.2 3.29, 2.94	PBL.1, PBL.2, PBL.3, PBL.4 3.17, 2.79, 3.00, 2.80	ICS.1, ICS.2, ICS.3 4.00, x, x	PRO.1, PRO.2, PRO.3, PRO.4 3.00, 2.00, x, x	SBP.1, SBP.2, SBP.3, SBP.4 2.00, 2.00, 2.00, x
Lord, Norman	PC.1, PC.2, PC.3, PC.4 2.24, 2.45, 2.80, x 2.45	MK.1, MK.2 2.45, 1.88	PBL.1, PBL.2, PBL.3, PBL.4 1.80, 2.25, 2.00, 2.00	ICS.1, ICS.2, ICS.3 2.42, x, x	PRO.1, PRO.2, PRO.3, PRO.4 2.15, 2.00, x, x	SBP.1, SBP.2, SBP.3, SBP.4 2.00, 2.25, x, x
Vignos, Cynthia	PC.1, PC.2, PC.3, PC.4 2.69, 2.88, 3.00, 2.67 2.81	MK.1, MK.2 2.88, 2.79	PBL.1, PBL.2, PBL.3, PBL.4 2.80, 2.80, x, 3.00	ICS.1, ICS.2, ICS.3 2.67, x, x	PRO.1, PRO.2, PRO.3, PRO.4 2.75, 2.00, x, x	SBP.1, SBP.2, SBP.3, SBP.4 2.33, 2.50, x, x

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

The screenshot shows a web interface for a Subcompetency report. At the top, there are tabs for 'Residents', 'Rotating Residents', 'Faculty', 'Other Personnel', and 'Rotations'. A 'Filter' dropdown and 'Current Academic Year' dropdown are also present. Below these is a 'Subcompetency' dropdown menu. The main content area is for 'Internal Medicine' and has two tabs: 'Internal Medicine' and 'Osteopathic Recognition', with the latter being highlighted by a red circle. Below the tabs is a table with columns for 'Name', 'PC', 'MK', 'PBLI', 'ICS', and 'PRO'. A dropdown for '1st Year in Residency' is visible. The table contains two rows of data for residents Nancy Durbin and Jovan Laskovski, with scores for various subcompetencies.

Name	PC	MK	PBLI	ICS	PRO
Durbin, Nancy	PC 1	MK 1	PBLI 1	ICS 1	PRO 1
	2.50				
Laskovski, Jovan	PC 1	MK 1	PBLI 1	ICS 1	PRO 1
	2.50				

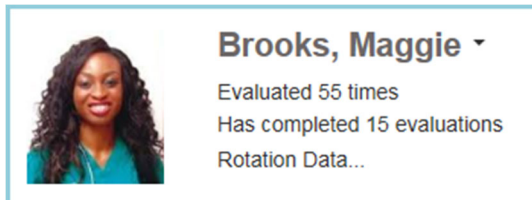
Individual-level view

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.



A resident profile card for Maggie Brooks. On the left is a small portrait photo of a woman with dark curly hair wearing a teal top. To the right of the photo, the name "Brooks, Maggie" is displayed in bold black text with a small downward-pointing triangle to its right. Below the name, three lines of text are listed: "Evaluated 55 times", "Has completed 15 evaluations", and "Rotation Data...". The entire card is enclosed in a thin blue border.

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>By Person or Rotation**
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

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>By Person or Rotation
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

The screenshot displays the 'Tags Reports' interface for a resident named Maggie Brooks. The interface includes a navigation bar with tabs for 'Overall', 'Tags', 'Comments', 'Subcompetency', 'Missions', 'Competency', 'Problems', 'Compliance', and 'Exportable Data'. The 'Tags' tab is selected, and the 'Tag by Grade Scale' report is displayed. The report shows the following data:

Tag	Average	Peer Average	Minimum	Maximum	Standard Deviation
Professional Behavior					
Poor - Excellent	4.89	4.27	4	5	0.33
2nd Year in Residency					
David Bradshaw (1/10/2018 2:40:45 PM) Resident was very sensitive and caring with a Muslim family.					
Teresa Spivey (1/10/2018 2:43:56 PM) Very honest!					
Lists to all opinions - Attends team meetings on a reg...					
100% Regular meetings					
Attends team meetings on a regular basis					
30%					
Teresa Spivey (1/10/2018 2:42:58 PM) Not afraid to be an advocate for the patient					
Tag: Overall					
Yes/No	1	0.50	N/A	N/A	N/A
2nd Year in Residency					
Professionalism - Leadership					
100% Regular meetings					
Medical Knowledge					
42.86%					
Teresa Spivey (1/10/2018 2:43:56 PM) Very good at finding solutions to equipment problems.					
Tag: Patient Caring					
Poor - Excellent	4.89	4.27	4	5	0.33
2nd Year in Residency					
David Bradshaw (1/10/2018 2:40:45 PM) Very thorough process.					
Tag: Clinical Practice					

Tag by Question

Generate the 'Tag by Question' report:

1. Go to Evaluations > Reports>By Person or Rotation
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

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

Grade Scale	Average	Peer Average	Minimum	Maximum	Standard Deviation
Poor - Excellent	5	4.2	5	5	0.33

David Brinkshaw 10/22/16 2:40:46 PM
Resident was very sensitive and caring with a Muslim family.

Select the attributes of this resident when working within an interprofessional team.

Grade Scale	Most Frequent Response	Peer Selected
Listens to all opinions - Attends team meetings on a reg...	Attends team meetings on a regular basis	100%

Teresa Spino 10/22/16 2:42:06 PM
Not afraid to be an advocate for the patient!

Resident is a good role model for professional behavior.

Grade Scale	Average	Peer Average	Minimum	Maximum	Standard Deviation
Poor - Excellent	4.67	4.2	4	5	0.33

Teresa Spino 10/22/16 2:42:06 PM
Very honest!

Tag: Overall
Select the resident's best skill. Select only one.

Grade Scale	Most Frequent Response	Peer Selected
Professionalism - Leadership	Medical Knowledge	42.86%

Teresa Spino 10/22/16 4:14:33 PM
Very good at finding solutions to equipment problems.

Is the resident progressing as expected?

Grade Scale	Average	Peer Average	Minimum	Maximum	Standard Deviation
Yes/No	5	0.8	N/A	N/A	N/A

2nd Year in Residency

Tag: Patient Care
Takes vital signs of patient

Grade Scale	Average	Peer Average	Minimum	Maximum	Standard Deviation
Poor - Excellent	5	4.4	5	5	0.33

David Brinkshaw 10/22/16 2:40:46 PM
Very thorough process.

Tag: Clinical Practice
Takes vital signs of patient

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>By Person or Rotation**
2. Select a resident
3. Click the Comments tab
4. By default, you'll be on the 'Comments by Evaluator' report

The screenshot shows a web interface for a resident named Maggie Brooks. At the top, it displays her name, a profile picture, and statistics: 'Evaluated 55 times' and 'Has completed 15 evaluations'. Below this is a navigation bar with tabs for 'Overall', 'Tags', 'Comments', 'Subcompetency', 'Milestones', 'Competency', 'Problems', 'Compliance', and 'Exportable Data'. The 'Comments' tab is selected. Underneath, there's a sub-tab 'Comments by Evaluator' and two checkboxes: 'Show Question' (checked) and 'Identify evaluators' (unchecked). The main content area is divided into sections for different evaluators. The first section is for 'Anonymous', showing 'Overall comments' with the text 'Excellent resident!'. The second section is for 'Benson, Wayne', showing 'Question comments' for two 'Well Baby' visits and 'Clinical knowledge (MK1)'. The third section is for 'Bradshaw, David', showing 'Question comments' for two specific scenarios and 'Overall comments'.

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.

The screenshot shows a web application interface for a resident named Brooks, Maggie. The interface is titled 'Comments by Rotation' and displays a list of comments grouped by rotation. The resident's profile information at the top includes 'Brooks, Maggie', 'Evaluated 10 times', 'Has completed 0 evaluations', and 'Rotation Data'. The interface has a navigation bar with tabs for 'Overall', 'Tags', 'Comments', 'Subcompetency', 'Milestones', 'Competency', 'Problems', 'Compliance', and 'Exportable Data'. The 'Comments' tab is selected. Below the navigation bar, there is a dropdown menu for 'Comment by Rotation' and a 'Filter' button. The main content area shows a list of comments grouped by rotation. The first rotation is 'Rotation - JCB: Ambulatory', followed by 'Rotation - JCB: Cardiology', and 'Rotation - JCB: EM'. Each rotation section includes a question comment and an overall comment. The evaluator names are visible: 'Benson, Wayne' for the Ambulatory and Cardiology rotations, and 'Broshkov, David' for the EM rotation. The interface also includes a 'Show Question' checkbox and an 'Identify evaluators' checkbox.

Comments by Tag

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

The screenshot shows a user profile for 'Brooks, Maggie' with 10 evaluations. The 'Comments' tab is selected, and the view is filtered by 'Tag'. The comments are grouped into four categories:

- Tag: Clinical Practice**
 - Bradshaw, David**
 - Question: Takes vital signs of patient. 1/27/2016 2:49:45 PM JGSE - Generalist. Very thorough process.
- Tag: Communication**
 - Bradshaw, David**
 - Question: Works well with patients and families of different socio-economic backgrounds, religions, sexual preferences and cultures. 1/27/2016 2:49:45 PM JGSE - Generalist. Resident was very sensitive and caring with a Muslim family.
- Tag: Overall**
 - Spino, Teresa**
 - Question: Select the resident's best skill. Select only one. 1/26/2016 4:14:55 PM JGSE - Pediatric. Very good at finding solutions to equipment problems.
- Tag: Patient Caring**
 - Bradshaw, David**
 - Question: Takes vital signs of patient. 1/27/2016 2:49:45 PM JGSE - Generalist. 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 same user profile for 'Brooks, Maggie'. The 'Comments' tab is selected, and the view is filtered by 'Form'. The comments are grouped into two categories:

- Form: Faculty Evaluation of Resident**
 - Nelson, Wayne**
 - Question comments:
 - Question: Conduct a 'Wet Baby' visit. 1/27/2016 4:00:00 PM JGSE - GP. Conducts a visit through third baby visit. Excellent with child and mother.
 - Question: Conduct a 'Wet Baby' visit. 1/27/2016 4:00:00 PM JGSE - Anesthesiology. Excellent with patient and family.
 - Question: Clinical knowledge (AKS). 1/27/2016 4:00:00 PM JGSE - Challenge. Excellent knowledge of diseases and symptoms.
 - Overall comments:
 - 1/27/2016 4:00:00 PM JGSE - Anesthesiology. Excellent first year resident.
- Form: Shift Call**
 - Spino, Teresa**
 - Question comments:
 - Question: Appropriately manages situations requiring urgent or emergent care. 1/27/2016 4:00:00 PM JGSE - GP. Works well in stressful situations.
 - Question: Has professional and respectful interactions with patients, colleagues and members of the interprofessional team (e.g. peers, consultants, nursing, auxiliary professionals and support personnel) (PROF). 1/27/2016 4:00:00 PM JGSE - Anesthesiology. Excellent resident.
 - Overall comments:
 - 1/27/2016 4:00:00 PM JGSE - GP. Outstanding 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>By Person or Rotation**
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...

▼ Filter ▾

📅 Current Academic Year ▾

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

Internal Medicine

Osteopathic Recognition

Training Year	PC		MK	PBLI	ICS	PRO
1st Year in Residency	PC 1	PC 2	MK 1	PBLI 1	ICS 1	PRO 1
	2.00	2.50	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> By Person or Rotation
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.

The screenshot shows the Milestones Report for Maggie Brooks. The report is organized into columns for different competencies: PC (Patient Care), MK (Medical Knowledge), PBL (Professionalism and Behavioral Learning), ICS (Institutional Core Skills), PRO (Professionalism), and SBP (Self-Reflection and Professionalism). Each competency column contains sub-competency levels (e.g., PC 1, PC 2, etc.). The scores are displayed as percentages, with a maximum score of 100% indicated. The report is filtered for the period 07/01/2014 - 09/30/2015.

Training Year	PC	MK	PBL	ICS	PRO	SBP
1st Year in Residency	PC 1: 80 / 100	MK 1: 87 / 100	PBL 1: 88 / 100	ICS 1: 78 / 100	PRO 1: 78 / 100	SBP 1: 87 / 100
	PC 2: 87 / 100	MK 2: 87 / 100	PBL 2: 88 / 100	ICS 2: 87 / 100	PRO 2: 78 / 100	SBP 2: 88 / 100
	PC 3: 88 / 100		PBL 3: 88 / 100	ICS 3: 87 / 100	PRO 3: 87 / 100	SBP 3: 87 / 100
	PC 4: 88 / 100		PBL 4: 88 / 100		PRO 4: 88 / 100	
	PC 5: 88 / 100					SBP 4: 88 / 100

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>By Person or Rotation**
- 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
 Evaluators: 53 items
 100% completed 15 evaluators
 Rotation Data... Filter - 07/01/2014 - 06/30/2015 - View PDF

Overall	Tags	Comments	Sub-competency	Milestones	Competency	Problems	Compliance	Exportable Data
Training Year	FC	MK	PBLI	ICS	PRO	SBP	OPCMM	
Resident Average (1st Year in Residency)	84.23%	0.00%	0.00%	87.14%	0.00%	0.00%	0.00%	
Peer Average	68.13%	0.00%	0.00%	68.13%	0.00%	0.00%	0.00%	
Rotation	FC	MK	PBLI	ICS	PRO	SBP	OPCMM	
JOB Ambulatory (1st Year in Residency)	90.00%	0.00%	0.00%	90.00%	0.00%	0.00%	0.00%	
JOB Cardiology (1st Year in Residency)	80.00%	0.00%	0.00%	100.00%	0.00%	0.00%	0.00%	
JOB 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>By Person or Rotation**
- 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



Lord, Norman

Evaluated 9 times
Has completed 11 evaluations
Rotation Data...

Filter

07/01/2014 - 06/30/2015

View PDF

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

Questions receiving low scores:

Identify evaluators Comments

Faculty Evaluation of Resident	Post Graduate Year	Submitted on:	Score	Value	Peer Average
Takes vital signs of patient	1st Year in Residency	2/18/2015 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

Questions Scoring below 25%

No data found for this reporting period

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>By Person or Rotation**
- 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

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	JOB: Ambulatory	6/1/2015	6/30/2015	7/3/2015
JOB: Ambulatory	Resident Evaluation of Rotation	JOB: Ambulatory	6/1/2015	6/30/2015	7/3/2015
JOB: Wards A	Resident Evaluation of Rotation	JOB: 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>Data Export**
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

Evaluator	Rotation	Q1	Q2	Q3	Q4	Q5								
Faculty Evaluation of Resident (RM)														
Washburn, David	JOB ICU 12/1/2015 - 12/31/2015	Inclusive, Friendly, Thorough, Sensitive	25	Medical Knowledge	1	-								
Spino, Teresa	JOB Pediatrics 1/1/2016 - 1/31/2016	Inclusive, Friendly, Sensitive	31	Problem-Solving	1	-								
Washburn, David	JOB EM 7/1/2015 - 7/31/2015	Friendly, Thorough, Sensitive	20	Medical Knowledge	1	-								
Benzon, Wayne	JOB Ambulatory 8/1/2015 - 8/31/2015	Polite, Inclusive, Friendly, Thorough, Sensitive	20	Communication	1	-								
Benzon, Wayne	JOB Cardiology 9/1/2015 - 9/30/2015	Inclusive, Friendly, Thorough	30	Medical Knowledge	1	-								
Washburn, David	JOB Genetics 11/1/2015 - 11/30/2015	Polite, Inclusive, Friendly, Thorough, Sensitive	30	Problem-Solving	1	-								
Benzon, Wayne	JOB Consults 10/1/2015 - 10/31/2015	Polite, Inclusive, Friendly, Thorough, Sensitive	31	Problem-Solving	1	-								
Faculty Evaluation of Resident (REV)														
Benzon, Wayne	JOB Ambulatory 8/1/2015 - 8/31/2015	5	5	4	1	3	3.5	-	-	3.5	-	3.5	-	3.5

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>By Person or Rotation**
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 ▾

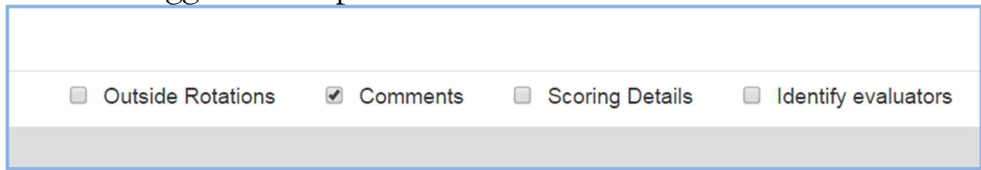
- **Performance** displays rotations that were included in your sessions, including rotations from outside departments.

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

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



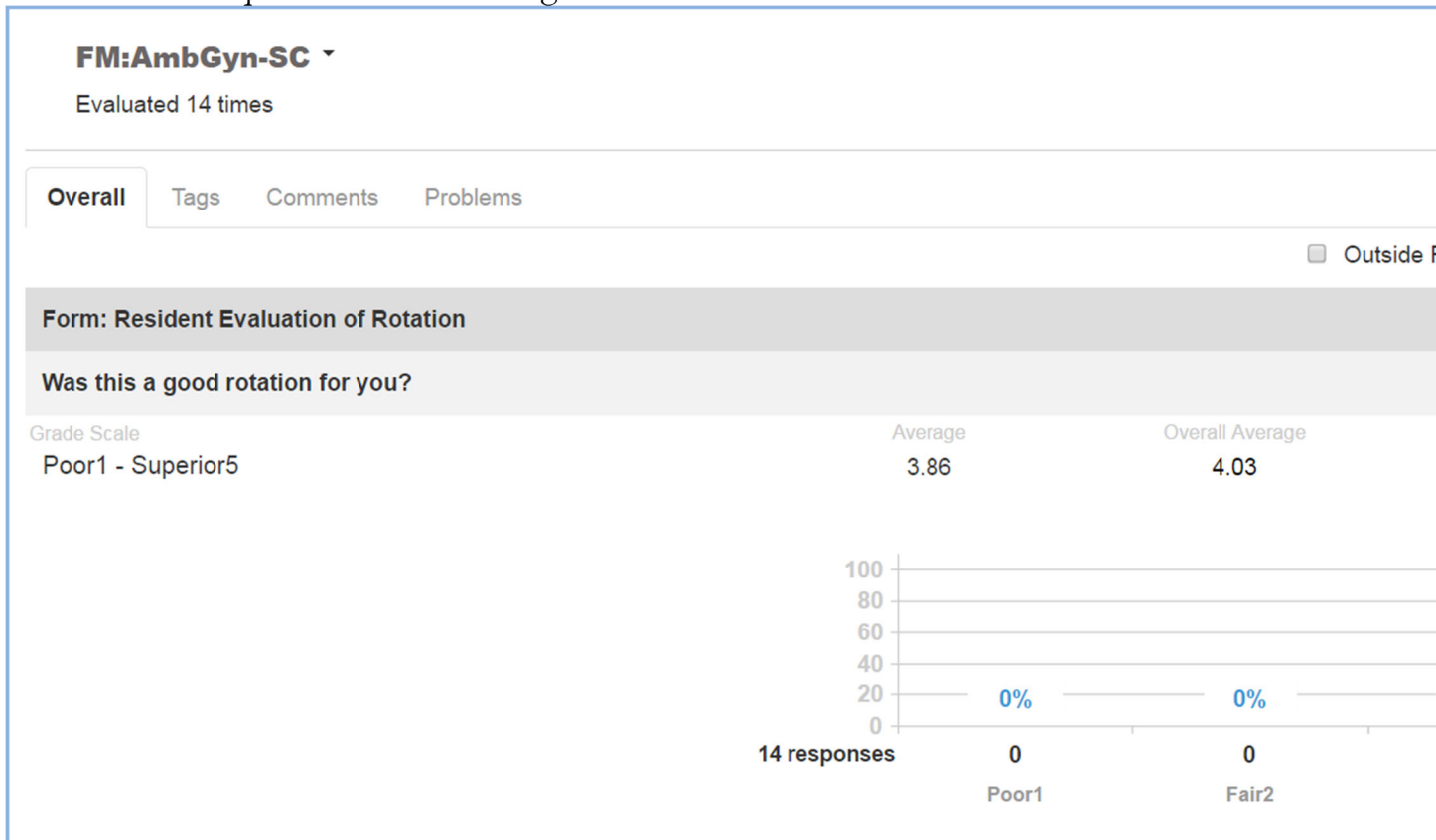
- **Outside Rotations:** Overall Average will include outside rotations evaluated by this department
- **Comments:** Include comments on the report
- **Scoring Details:** Include a graph of responses
- **Identify Evaluators:** Display the names of evaluators

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

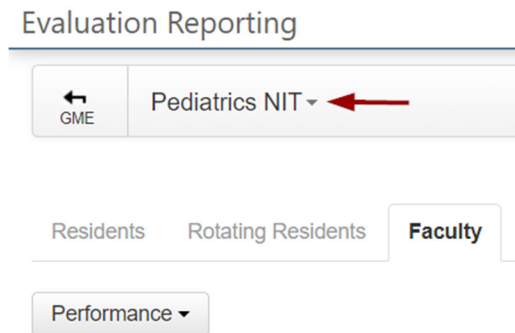


Individual Faculty Evaluation Reports

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

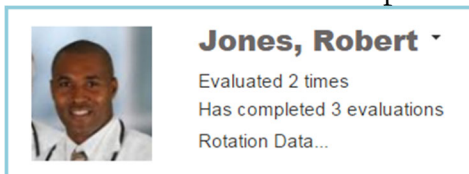
View the evaluation data collected on your faculty members with these individual reports.

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



to multiple

3. Click the **Faculty** tab
4. Click an individual faculty member's name
You land on the overall report for the faculty



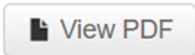
- The faculty member's name and photo appear at the top left of the report, along with:
 - Total number of times this faculty has been evaluated for the date range of the report
 - Total number of evaluations completed by this faculty during the date range of the report
 - Hover over **Rotation Data** 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.	

5. 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 range
- The 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



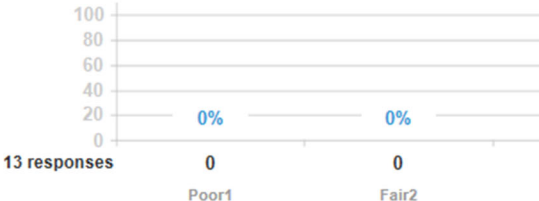
Beres, Amanda ▾
Evaluated 13 times
Has completed 21 evaluations
Rotation Data...

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

Form: Resident Evaluation of Faculty

The attending created a stimulating, challenging, and supportive learning environment.

Grade Scale	Average	Peer
Poor1 - Superior5	4.92	



13 responses

Category	Count	Percentage
Poor1	0	0%
Fair2	0	0%

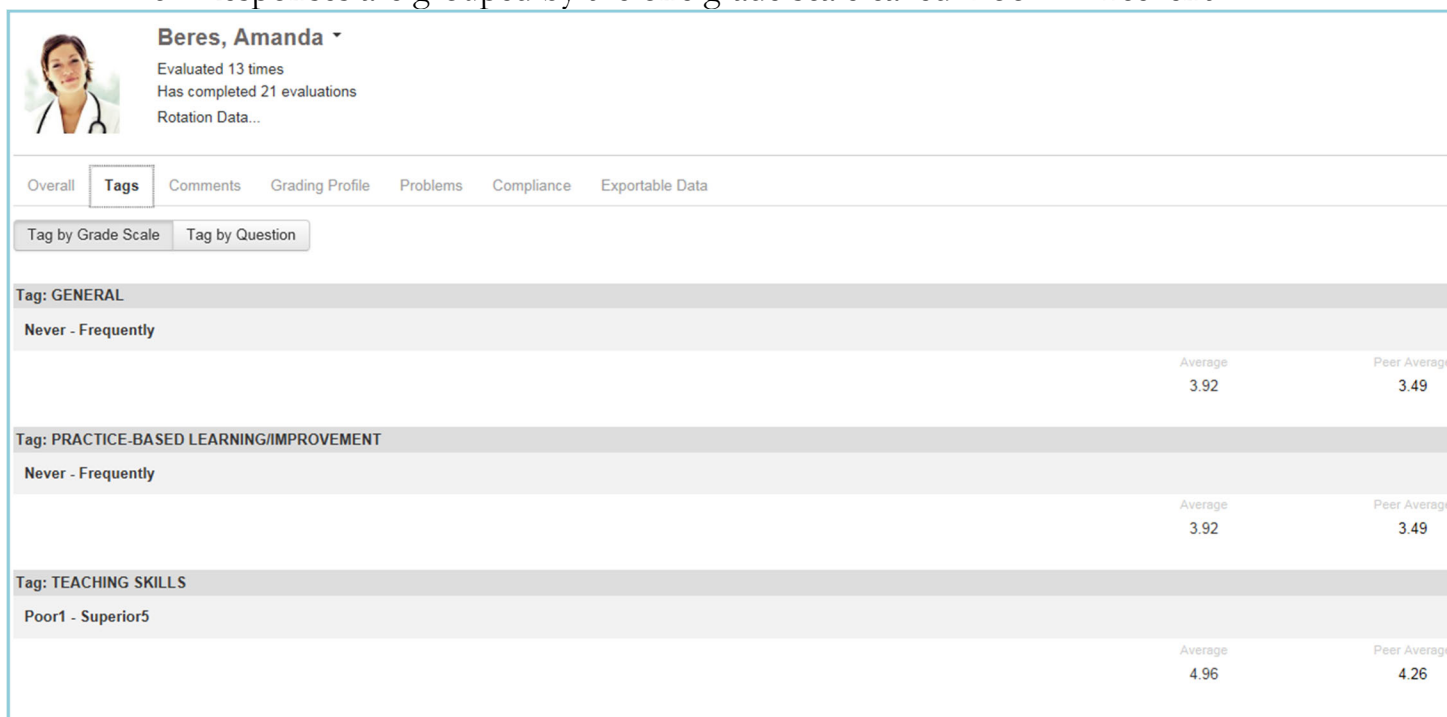
Tags Report

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>By Person or Rotation**
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'



The screenshot shows a user profile for Amanda Beres with a dropdown arrow. Below the profile, there are tabs for 'Overall', 'Tags', 'Comments', 'Grading Profile', 'Problems', 'Compliance', and 'Exportable Data'. Under the 'Tags' tab, there are two sub-tabs: 'Tag by Grade Scale' (selected) and 'Tag by Question'. The main content area displays three sections, each with a tag name and a grade scale range. The first two sections, 'GENERAL' and 'PRACTICE-BASED LEARNING/IMPROVEMENT', both show a 'Never - Frequently' grade scale. The third section, 'TEACHING SKILLS', shows a 'Poor1 - Superior5' grade scale. Each section includes an 'Average' and a 'Peer Average' column.

Tag	Grade Scale	Average	Peer Average
GENERAL	Never - Frequently	3.92	3.49
PRACTICE-BASED LEARNING/IMPROVEMENT	Never - Frequently	3.92	3.49
TEACHING SKILLS	Poor1 - Superior5	4.96	4.26

Generate the 'Tag by Question' Report:

1. **Go to Evaluations > Reports>By Person or Rotation**
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 report 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!

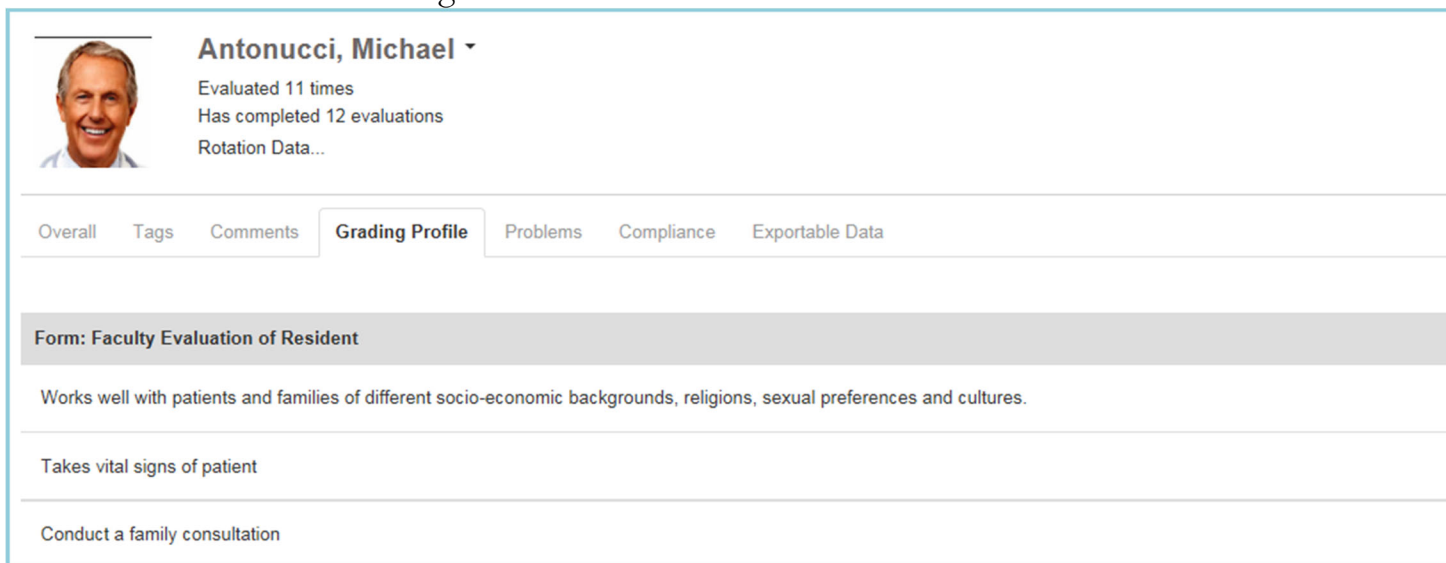
Grading Profile Report

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>By Person or Rotation**
2. Select the Program
3. Click on the Faculty tab
4. Select a faculty member
5. Click the Grading Profile tab



The screenshot shows a user profile for Michael Antonucci. The profile includes a photo, name, and statistics: "Evaluated 11 times", "Has completed 12 evaluations", and "Rotation Data...". Below the profile is a navigation bar with tabs: "Overall", "Tags", "Comments", "Grading Profile" (selected), "Problems", "Compliance", and "Exportable Data". The main content area displays a "Form: Faculty Evaluation of Resident" with three items: "Works well with patients and families of different socio-economic backgrounds, religions, sexual preferences and cultures.", "Takes vital signs of patient", and "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>By Person or Rotation**
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


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	Completed On Time	Completed Late	Declined	Delinquent
29	15/29 (51.72%)	1/16 (6.25%)	2 (6.90%)	13 (44.83%)	0	0
Delinquent Evaluations						
Subject	Session	Rotation	Start	Due Date	Status	Days Past Due
Aktar, Aboud	Faculty Eval of Resident	FM:Geri-PCMH	4/7/2016	4/14/2016	Delinquent	7
Aktar, Aboud	Faculty Eval of Resident	FM:Card-SC	5/5/2016	5/12/2016	Delinquent	7
Aktar, Aboud	Faculty Eval of Resident	FM:Derm-SC	6/2/2016	6/9/2016	Delinquent	7

Generate the Compliance Report:


1. **Go to Evaluations > Reports.by Person or Rotation**
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>By Person or Rotation**
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



Matthews, Kathy ▾
Evaluated 10 times
Has completed 16 evaluations
Rotation Data...

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

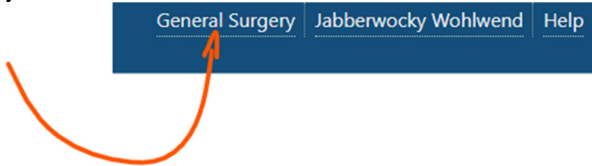
Evaluator	Rotation		Q1 1 to 5	Q2 1 to 5
Resident Evaluation of Faculty				
 Anonymous	Anonymous	-	2	2
 Anonymous	Anonymous	-	4	4
 Anonymous	Anonymous	-	4	5

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 > Reports>Data Export**

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 trainees/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: 8/30/2016

Use Session Interval Start Date
 Use Completed date of evaluation

Evaluation Form

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		

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