Evaluations Training Introduction & Setup Forms

Intro to Evaluations

Evaluations Module has Several Components

- Intro & Setup Forms
- Evaluation Program
- Distribute Forms
- Manage Distribution
- Reports & Export

Introduction to Evaluations

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

Evaluation Types

(most common evaluation types are bolded below)

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

Evaluation Forms

- You should have a form created for each type of evaluation (faculty evaluation of trainee, trainee evaluation of faculty, trainee evaluation of rotation, 360, Peer evaluations, etc.)

Sessions

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

- The evaluation form
- Evaluator statuses
- Subject statuses (for evaluations of people)
- Rotation names (for evaluations of rotations)
- Dates
- Email notifications
- Signature Requirements
- Anonymity Settings
- On Demand Options

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

Before Creating Sessions

Have these ready:

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

Evaluations Access

Level 6-MMCGME

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

Evaluation Access

Level 5- Program Coordinator

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

Evaluations Access

Level 4- Low Level Administrators or Dept/GME staff

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

Evaluations Access

Levels 3, 2, 1- Faculty and Trainees

- Complete evaluations
- Sign evaluations as subject
- View completed evaluations by and about self (excluding anonymous)
- View evaluation reports about self

How to Create Good Forms

DO:

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

What to Avoid When Creating Forms

DO NOT:

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

Creating Evaluation Forms

Character Limits

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

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

What You See on the Evaluation Form Builder Page

- The name of the form - which is not what shows up on the evaluation form when it is matched. (The one in larger letters.)
- The title of the form - this is what shows up when the evaluation form is matched
- An icon to represent whether there is still milestone version 1 content on the form
- How many questions your form contains
- How many sessions this form was distributed in. Click the number to see the session names and how many times it was matched
- The date of the latest match

Form Builder Actions

- Hover over actions to:
  - Edit a form
  - Preview a form
  - Archive a form
  - Delete a form
  - Copy to a new form - to remove Html code or to edit the form
  - Copy to Department - to share your form with another department

  If you see a gold exclamation point on your form builder page, it means you have html code in your form and it does not allow it to completed on a mobile device. Copying to the new form will remove the code and make the form mobile ready.

Create a new Evaluation Form

- **Go to Evaluations > Setup & Manage>Evaluation Forms**
- Start creating a form by clicking the blue add new button in the upper left hand corner of the page
  - Enter an internal name - this is not what shows up on the form but only in the list of evaluations - *required
  - Enter a title for your form - this will show up on the evaluation - *required
  - A Subtitle is optional and is a good place to put the name of your program if desired
  - Instructions are optional and typical to just say "please complete this evaluation"
  - Click the continue to button to add questions to your form

Adding General Questions to your form

- There are 5 options for general questions:
  - Rating Scale - this is a number scale such as 1-5 or 1-9
  - Multiple Choice - recipient can check all that apply
  - Yes/No - the options allow the recipient to affirm or deny a statement
  - Number - can set a minimum and maximum value
  - Text - freehand text area ~~#~~250 character limit

Rating Scale Questions

Add a Rating Scale Question

1. Click Add a Component > General > Rating
2. Enter the question text
3. Enter responses. You can:
   Use an existing set of responses:
   a) Click the Rating Scale
   b) Choose any saved rating scale
   c) Add options by clicking the plus sign
4. You can have up to 12 options
5. Each option has a default value, starting with 1. You can change the value, but the values must be in ascending or descending order. The values reset themselves when you add or remove a choice. Values can contain decimal points to create half points.
6. Values don't appear on the form but Option Labels do. Enter a label for each option in the scale so evaluators know what they are choosing.
7. Click the minus sign to remove an option
8. Click carrot icon to set low or high score notifications. See Setting Other Question Options below for details
9. Click Save. Now you can add other questions to your form

Multiple Choice Questions

Add a Multiple Choice Question

1. Click Add a Component > General > Multiple Choice
2. Enter the question text

   Example: Where should we hold the Winter party?
3. Check Multiple Responses if you want the evaluator to be able to select several options instead of just one

   Example: Choose each location where you trained on this rotation
4. Enter each choice in the Option Label
5. Click the plus sign to add more choices
6. Click the minus sign at the end of the row to remove a choice
7. Click the carrot icon to set low or high score notifications. See below for High/Low tips
8. Click Save. Now you can add other questions to your form

Yes/No Questions

Add a Yes/No Question

1. Click Add a Component > General > Yes/No
2. Enter question text
   Example: Did you have enough time to prepare for rounds each day?
3. Enter any alternative labels for Yes and No
4. By default a green check mark is next to the top response and a gray check mark is next to the bottom response. You can click the gray check to swap gray and green positions.
   Put the green check next to the more desirable response. The green check indicates, "If an evaluator picks this option, all is well."
   Example: For the question, "Dropped the infant" - you'd probably set Yes to gray, No to green
   Example: "Is the resident making sufficient progress?" - Yes is green, No is grey
5. Click the carrot icon to set low or high score notifications
   Example: If your question is "Is the resident making sufficient progress," a low score notification can alert you as soon as an evaluator says "No." This notification could give you a chance to take corrective action
6. Click Save

Number Questions

Add a Number Question

1. Click Add a Component > General > Number
2. Enter the question text
3. Enter the minimum value you want to allow any evaluator to enter
4. Enter the maximum value

   Evaluators see the permitted range and can only submit a number within that range.
5. Click Save

Text Box Questions

Add a Text Box Question

1. Click Add a Component > General > Text
2. Enter the question text

   Example: How can we improve?

   Character limit for the evaluator's response: 250
3. Click **Save**

Other General Question Options

Other General Question Options-Score Notifications

Score Notifications

- You can set automatic notifications for low and high score responses.
- Low Score Notification: Sends a notification to selected persons whenever an evaluator picks this response. The options arrow changes to red.
- High Score Notification: Sends a notification to selected persons whenever an evaluator picks this response. The options arrow changes to green.
- Nothing: Click to remove any notification settings from this response

Other General Question Options-Default Response

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

Other General Question Options-Allow N/A

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

Other General Question Options-Require Response

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

Other General Question Options-Comments

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

Require comments

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

Other General Question Options-Add Tags

- Under Competencies and Tags, click Add one here... to add a tag. For resident and fellow evaluations, tags are especially useful for associating questions with ACGME milestones.
- For trainee evaluations: Select a Core Competency (these do not appear in CCC reviews. Try using subcomp tags instead), or Milestone Subcompetency or type in a custom tag. Custom tags can be useful for your own reporting schemes.
- For other evaluations: type in a custom tag

Adding Specialized Questions to your Forms

Adding Specialized Questions to your form

- There are 4 specialized types of questions you can add to your forms.
- For EPAs and custom subcompetencies, it is easiest to set them up before adding them to your form
  - EPA - Entrustable professional activity - EPA's must be published for your program and are enabled by going to Evaluations>Milestones>EPAs
  - Milestone - selecting a specific level and value to make it an yes/no question
  - Subcompetency - makes the question the exact grid for the milestone subcompetency just like it looks in the milestone review. Tends to make the form lengthy.
  - Custom Subcompetency - custom subcompetency questions allow you to have a question that looks like a milestone but change the verbiage and the levels. Custom subcompetency questions are set up by going to Evaluations>Milestones>Custom Subcompetencies

EPA Questions

Add an EPA Question

First check to make sure you have published EPA's: Evaluations>Milestone>EPA's

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

Milestone Narrative Questions

Add a Milestones Question

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

The selected milestone narratives are now individual questions to your form

Subcompetency Questions

Add a Subcompetency Question

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

A. Add subcompetencies directly to your form (instructions below)

B. Add subcompetencies to your form based on the learner's current rotation

Add a Subcomp Directly to Form

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

The selected subcompetencies are now individual questions on this evaluation form

Custom Subcompetency Questions

Custom Subcompetencies Question

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

Custom subcomps can serve a few different ends:

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

Add a Custom Subcompetency Question

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

Add Section Headers/Dividers

Add a Section Divider or Instructions

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

Moving Things Around

Move a question, section divider or instruction

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

Save your Form

Save your Form

After all questions have been added to your form:

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

Auto Log-in

Configuring Auto-Login

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

1. **Evaluations>Setup& Manage>Configure Auto-Login**
2. Select the Work Roles that will be given the Auto-Login link in their emails
3. Click **Save**

Auto-Login for High/Low Score Notifications

When a user is identified as a recipient of a High/Low notification, they receive an email with the auto-login link.

However, for security reasons, when the recipient clicks the link in the email, the system records the High/Low score page and forces the user to perform a conventional login. When that is completed, the system redirects the user to the High/Low score page.

Editing a Form in Use

Editing a Form Already in Use

- If a form already has any responses, only edit it to correct minor errors like typos. Because even inadvertently changing the meaning of questions will compromise the responses given by previous evaluators.
- For substantial edits, Copy the form and Edit the copy instead of editing the original. Then update any sessions to distribute the new form instead of the original.
- If a form has yet to be distributed, feel free to make any sort of edit

Fix a typo in a evaluation form

- **Go to Evaluations > Setup & Manage>Evaluation Forms**
- Select Edit from the Actions dropdown to the right of the form to edit
- Edit the name or instructions by hovering over the name and clicking on the section
- Make changes and click Save
- Edit questions by hovering over the question and clicking Edit. When you edit a question or grade scale, you get three choices. These choices depend on where the item is used. You can make changes to:
  - Just this question only (will only see if item is used elsewhere)
  - Everywhere on this form only (will only see if item is used more than once on the form)
  - Everywhere in this department (will only see this option if the question or grade scale is used on more than one form)

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

Edits you cannot make

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

Edits you can make

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

Previewing your Form

Previewing Evaluation Forms

You can preview a form to see how it will look to evaluators.

With the form open in the builder:

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

To preview any form in your library:

1. Go to Evaluations > Setup & Manage>Evaluation Forms
2. Click Preview from the Actions dropdown list

Mapping to Milestones

Mapping to Milestones

- **Evaluations>Setup & Manage>Milestones**

Which types of questions can be mapped to milestones?

- You may associate any of these types of questions to the published Milestone Subcompetencies: (Doing so will let them appear on CCC Milestone Reviews)
  - Rating
  - Text
  - Yes/No
  - Custom Subcompetencies
  - EPA

EPAs

if applicable

Configuring Milestones-EPAs

- Build your library of Entrustable Professional Activities and map them to subcompetencies or milestone narratives.
- You can associate the following to evaluation questions: to the following by navigating to: Evaluations>Setup& Manage>Milestones
  - EPAs - You can map evaluation results from your EPAs to:
    - ACGME published subcompetencies and/or
    - ACGME published individual milestone narratives

Most programs map their EPAs to subcompetencies. The evaluation results from your EPA questions will then be available to the CCC in a resident's Milestone Review.

How to Map to EPA's

1. Go to Evaluations > Milestones
2. On the EPA panel, click Configure
3. Click the Map button next to an EPA. (EPAs with a green 'Mapped' button have already been mapped.)
4. Select Milestones
5. Click on the Map to Milestones tab
6. Click on a Subcompetency. The page expands to display all of the milestone narratives for that subcompetency.
   - The columns on the right represent each level of the Entrustment Scale.

7. Find the milestone that this EPA should be mapped to
8. You can mouse over each number to see what each Entrustment Scale level stands for:
9. Click the number that represents the 'minimum' level of trust required to indicate that the resident has achieved this milestone. For example - In the screenshot below, the "minimum level" selection indicates that a resident who receives a score of three or above on this EPA can be trusted to 'Recognize abnormal vital signs.'
   - If a learner receives a score of 1 or 2 on this EPA from a faculty member, the feedback to the CCC on the Milestone Review will be that 'No, this resident has NOT achieved this milestone.
   - If a learner receives a score of 3 or above on this EPA from a faculty member, the feedback to the CCC on the Milestone Review will be that 'Yes, this resident HAS achieved this milestone.'

Rotation

Rotation

- Allow subcompetencies to be evaluated by rotation using the standard milestone scale
- The forms questions will be different based on which rotation the trainee is on

Enable Rotation-Based Subcompetencies

You can automatically add subcompetencies to your evaluation forms based on the learner's rotation.
Do two things to enable rotation-based subcomps to appear on a form:

1. Choose which subcompetencies can be added for each rotation
2. Designate which forms can get rotation-based subcompetencies

Stage One: Choose Subcompetencies

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

Enable Rotation-Based Subcompetencies, continued

Stage Two: Select Forms

On the Configure Evaluation Forms tab:

1. Click None > Rotation for the form that you want these subcompetencies added to
2. Optionally click Require to force faculty members to answer the subcompetency questions

Check your Work

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

Questions

Questions

Tag any question in an existing evaluation form to relevant subcompetencies.

1. Click on questions
2. Click on configure
3. Select a form and click ok
4. Select a core competency
5. Select a subcompetency
6. Click in the white space to the left of the question to tie the subcompetency to the question

NOTE: You can also associate questions while building or editing an evaluation form

Custom Subcompetencies

Custom Subcompetencies

- Build your library of custom subcompetencies and map them to subcompetencies.
- Custom Subcompetency questions allow you to fill the empty template with your own text - whether that's your curricular milestones, a shortened version of your specialty's published milestones or your own questions. These custom subcompetencies can be mapped to the ACGME published milestone subcompetencies providing the evaluation results to the CCC within a resident's Milestone Review.
- If you have Osteopathic Recognition, you can also map the results of your custom subcompetencies to the Osteopathic subcompetencies.

- Note: This can also be done while building your evaluation forms

Map Custom Subcompetencies to ACGME Milestone Subcompetencies

Select a Custom Subcompetency

1. Go to Evaluations > Setup & Manage>Milestones
2. On the Custom Subcompetency panel, click Configure
3. Click the Map button next to a custom subcompetency. (Those with a green 'Mapped' button have already been mapped.)

Map to Subcompetencies

1. Check the box before one or more subcompetencies. The faculty responses to this custom subcompetency will be mapped to these ACGME published subcompetencies.
2. The columns on the right represent each level of your grade scale. They will be mapped on a 1-1 basis with the template on the subcompetencies1

Shift Cards

Configuring Shift Cards

- Shift Cards are daily evaluation forms that contain only ACGME milestone narratives. Use them for assessing residents and fellows. Faculty members and others can access shift cards from the Evaluations module, their Home page or from email reminders. All programs with published milestones, except for combined programs, can evaluate their learners with shift cards.
- Shift card evaluation results are included on the resident/fellow's Milestone Review for your Clinical Competency Committee and within Evaluation Reports

Create a Shift Card Form

1. **Go to Evaluations >Setup & Manage>Evaluation Forms**
2. Click Add New
3. Internal Name - Shift Card
4. Title - Shift Card
5. Subtitle (Optional)
6. Instructions - Enter instructions to your faculty members (Optional)
7. Click Continue
8. Check the box to require Overall Comments (Optional)
9. Click Done

Configure a Shift Card

1. **Go to Evaluations >Setup & Manage> Milestones**
2. On the Shift panel, click Configure
   - On the Milestone Setup page for Shift Cards, there are 3 tabs
   - You start of Tab 1 – Milestone Pool tab
3. Select the milestones that you want to be included in your pool of milestone questions. The system will randomly select questions from this pool of questions to create your Shift Cards.
4. If you have Osteopathic Recognition and have designated this in the software you can add Osteopathic Milestone narratives to your shift cards are well.
5. Click the settings tab
6. Select the number of milestone questions you would like on each shift card (the default is 10)

Configure Evaluation Forms Tab

- A list of your evaluation forms will appear on the screen. To designate the form that will used for Shift cards:
  - Click None in front of your form
  - Pick shift
  - Click require if evaluators are required to answer the milestone questions before being able to save the shift card

Osteopathic Recognition

If applicable

Designate the Program as having Osteopathic Recognition

1. **Go to Evaluations Setup & Manage> Milestones**
2. On the 'Osteopathic Recognition' panel, click Configure
3. Check the box to designate that your program 'Has Osteopathic Recognition'
4. A list of your residents will appear. By default, all residents will be selected to receive the Osteopathic Recognition milestones
5. Un-select any resident who should NOT be evaluated on the Osteopathic milestones
6. Your selections are automatically saved
7. Click Return to return to the prior screen

Osteopathic Trainees

The trainees you select to receive Osteopathic milestones will:

- Have Milestone Reviews that include the seven Osteopathic milestones
- Be available to receive Osteopathic milestone questions on their Evaluation forms
- Be available to have their evaluation results tagged to display in Evaluation Reports and on the Osteopathic subcompetencies in Milestone Reviews

High/Low Score Notifications

What are high/low score notifications

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

Works for these question types:

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

Does NOT work for

- Subcompetencies
- Custom subcompetencies
- EPAs
- Milestone narratives

What's in the notification?

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

Configure high or low score notifications- When creating a new form

1. After adding the grade scale, click on the down arrow next to the value that should get a low score notification
2. Select Low Score Notification from the Option Settings panel. The arrow turns red to indicate the low score notice
3. Next, select the value from the grade scale that should be the high score. The arrow turns green to indicate the high score notification
4. To indicate recipients, go to the top of the form and click the Notifications tab
5. Click the blue plus icon to move the recipient from the box on the left to the Send To: box on the right
    - To have the subject's advisor notified, check the box at the bottom of the Send To: list to include advisor
    - To remove someone from the Send To: list, click the gray minus sign icon

Configure high or low score notifications when updating an existing form

1. Go to Evaluations > Setup & Manage>Evaluation Forms
2. Find the form and click Edit from the Actions dropdown list
3. Hover over the question to add the notice to and select Edit
4. Click on the down arrow next to the value that should get a low score notification
5. Select Low Score Notification from the Option Settings panel. The arrow turns red to indicate the low score notice
6. Next, select the value from the grade scale that should be the high score. The arrow turns green to indicate the high score notification
7. To indicate recipients, go to the top of the form and click the Notifications tab
8. Click the blue plus icon to move the recipient from the box on the left to the Send To: box on the right
   - To have the subject's advisor notified, check the box at the bottom of the Send To: list to include advisor
   - To remove someone from the Send To: list, click the gray minus sign icon

Removing Unsupported Content

Removing Unsupported Content

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

That content could be:

- HTML (Bold, Underline, Italics, etc.)
- Two- or three-part questions
- Blank grade scales
- And other no-longer-supported types of content and styling

Update these forms if you want to keep using them.

If you don't distribute the form anymore, archive it instead of going through this update process

Steps to Copy the Original Form

1. Go to Evaluations > Setup & Manage> Evaluation Forms
2. Find a form with a 
3. Click Actions > Copy to New Evaluation Form

   All unsupported content is automatically removed from the copy
4. Recommended: rename the new form's internal name:
   - Keep the date that's automatically added but delete other dates
   - Add the word 'Revised' in front of the date so that you can better track your form versions
5. Save your new form

Your copied form has altered content

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

Steps to Compare & Update the New Form

1. See what content was not supported in your old form:
   - Navigate to your evaluations forms list
   - Click the  on the old form. A new tab opens in your browser
   - Look for yellow boxes describing affected questions
2. Compare your old and new forms. Depending on the type of unsupported content, you may need to add content back into your new form.

Completing Evaluations for Others

Completing Evaluations for Others

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

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

Sharing Evaluation Forms with Other Departments

Sharing Evaluation Forms with Other Departments

1. Find the form to copy
2. In the Actions drop-down list beside the form, select Copy to Department
3. Check the box of the department where you want the copy
4. Click Copy

Copying Forms

These items don't copy over

- Milestone narrative or subcompetency questions (custom subcompetencies do copy over)
- Milestone subcompetency tags (core competency tags do copy over)

These forms can't be copied

- GME forms can't copy to UME departments
- Non-optimized forms can't copy to another department. Any form that has non-optimized content. First, optimize the form, then copy it to another department.

Archiving or Deleting Forms

Archiving/Deleting Evaluation Forms

- **Go to Evaluations>Setup & Manage>Evaluation Forms**
- You can archive a form to remove it from your list and clean up your workspace. If you don't plan to distribute a form again, you should archive it. Archived forms continue to function. An archived form:
  - Is still distributed by any session
  - Can be unarchived
  - Has results that are still available in your reports—just click "include archived"
  - Is still available in your forms list—just click "include archived

Archiving and Deleting Forms, continued

- **Archive a Form**
  - Go to Evaluations >Setup & Manage> Evaluations Forms
  - Click Archive from the Actions dropdown list
- **Unarchive a Form**
  - Go to Evaluations > Setup & Manage>Evaluation Forms
  - Check the box Include Archived
  - Find the form you want to unarchive and click on the Actions dropdown
  - Click Unarchive
- **Delete a Form**
  - Go to Evaluations> Setup & Manage >Evaluation Forms
  - Find the form and click delete from the actions dropdown list

Requiring Signatures on Evaluations

Requiring Signatures on Evaluations

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

You can:

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

Allow Confidential Comments to the PD

Confidential Comments to the PD

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

Requirements for Confidential Comments

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

Enable Confidential Comments

To enable confidential comments, enable it in the session:

1. **Click Evaluations > Setup & Manage>Session Manager**
2. Open a session
3. Open the Evaluation Form tab
4. Check **Allow confidential comments** in the comments section
5. Optionally make confidential comments generate an email to the PD with or without the comments included
6. **Save** the session

Now evaluators can leave confidential comments if the Requirements above are met

How Does the PD Access the Comments

1. A PD can go to **Evaluations > Actions> Evaluation Hub**
2. Click the Program Director Comments tab