

Evaluations Module –Introduction & Setup forms

Section	Pages	Recommended Webinar
Types of Evaluations <ul style="list-style-type: none"> • Faculty Evaluation of Resident/Fellow • Resident/Fellow Evaluation of Faculty • Resident/Fellow Evaluation of Rotation • Faculty & Trainee Evaluation of the Program • Self-Evaluations • 360 Evaluations • On Demand Evaluations 	4	
Sessions	4-5	
Before creating sessions	5	
Evaluations Module Access Levels	6-7	
Glossary	7-9	
Do's & Don't of Creating Good Forms	10	
Creating Learner, Faculty, or Rotation Evaluations Forms <ul style="list-style-type: none"> • Character Limits • Create & Name a Form • Add Questions • Adding a Section Header or Instructions • Moving Questions • Include Rotation-Based Subcompetencies • Creating Custom Subcompetency Questions • Configuring Auto-Login • Creating Shift Cards • Creating & Distributing Praise/Concern Cards 	11-31	
Editing a form already in use <ul style="list-style-type: none"> • Allowed Edits • Not-Allowed Edits 	32-33	
Previewing Evaluation Forms	33-34	
Adding Rotation-Based Subcompetencies to Evaluations	34-37	
Setting High & Low Scores	37-39	
Removing HTML Code	40-41	
Completing Evaluations for Others	41-42	
Sharing Evaluations with other Depts.	43	

<ul style="list-style-type: none"> • Things that don't copy over • Forms that can't be copied 		
Archiving or Deleting Forms <ul style="list-style-type: none"> • Archive a form • Unarchive a form • Delete a form 	44-45	
Requiring Signatures on Evaluations	45-47	
Allowing Confidential Comments to the Program Director	47-48	
Question Type Descriptions & Examples <ul style="list-style-type: none"> • General Questions • EPA's Questions • Milestones Questions • Subcompetency Questions • Custom Subcompetency Questions 	49-58	

Evaluations Module –Evaluate a Program

Section	Pages	Recommended Webinar
Creating Program Evaluations	2-3	
Edit and Sharing Program Evaluation Forms	4	Help>Tutorial Videos>Evaluations [8.15] Evaluations-Program Evaluation Forms
Distributing Program Evaluations <ul style="list-style-type: none"> • Build a session • People Tab • Program Tab • Evaluation Form Tab • Settings Tab • Match Schedule Tab 	5-11	
Reports <ul style="list-style-type: none"> • Progress Report • Results Report • Problem Resolution Report 	11-14	Help>Tutorial Videos>Evaluations [8.14] Evaluations-Evaluation of a Program & Reports

Evaluations Module-Distribute Forms

Section	Pages	Recommended Webinar
<p>Distributing Learner, Faculty, Rotation Evaluations:</p> <ul style="list-style-type: none"> • How to distribute different evaluation types • Create a new session • Build session through tabs <ul style="list-style-type: none"> ○ People Tab ○ Rotations Tab ○ Evaluation Form Tab ○ Settings Tab ○ Match Schedule Tab • Signatures • Anonymity Options • Add Intervals 	4-12	<p>Help>Tutorial Videos>Evaluations [8.07] Signature Options</p> <p>Help>Tutorial Videos>Evaluations [8.05] Anonymity Options</p> <p>Help>Tutorial Videos>Evaluations [8.06] Email Options</p> <p>Help>Tutorial Videos>Faculty Evaluation of Resident [8.08]</p> <p>Help>Tutorial Videos>Resident Evaluation of Faculty Create Session [8.09]</p> <p>Help>Tutorial Videos>Resident Evaluation of Rotation [8.10]</p>
<p>Distributing 360 & Peer Evaluations</p> <ul style="list-style-type: none"> • Build session through tabs <ul style="list-style-type: none"> ○ People Tab ○ Rotations Tab ○ Evaluation Forms Tab ○ Settings tab ○ Match Schedule Tab • Anonymity Settings • Add Intervals • Configure Dates • Create Matches 	13-20	<p>Help>Tutorial Videos>Peer to Peer, 360 or Self Evaluations [8.11]</p>
<p>Distributing Self Evaluations</p> <ul style="list-style-type: none"> • Build session through tabs <ul style="list-style-type: none"> ○ People Tab ○ Rotations Tab ○ Evaluation Forms Tab ○ Settings tab ○ Match Schedule Tab • Anonymity Settings • Add Intervals • Configure Dates • Create Matches 	21-27	<p>Help>Peer to Peer, 360 or Self Evaluations [8.11]</p>

Distributing Daily Shift Cards <ul style="list-style-type: none"> • Build session through tabs <ul style="list-style-type: none"> ○ People Tab ○ Rotations Tab ○ Evaluation Forms Tab ○ Settings tab ○ Match Schedule Tab 	28-31	
Distributing Transfer of Care, Hand Off, or Shift Change Evaluations <ul style="list-style-type: none"> • Create Handoff Settings • Select Rotations 	32-33	
Distributing Patient Evaluation of Resident or Fellow <ul style="list-style-type: none"> • Build session through tabs <ul style="list-style-type: none"> ○ People Tab ○ Rotations Tab ○ Evaluation Forms Tab ○ Settings tab ○ Match Schedule Tab • Anonymity Settings • Add Intervals 	33-38	
Distributing Reciprocal Evaluations	39-41	
Editing/Deleting/Copying Matches	42-44	
Configuring Anonymity Options	45	Help>Anonymity Options [8.05]
Assess to Completed Evaluations	45	
Viewing Anonymous Evaluations <ul style="list-style-type: none"> • Changing Anonymity Options 	46-48	
Advanced Session Settings <ul style="list-style-type: none"> • Match Options • Create Matches • Display Options • Administrative Options 	48-51	
Creating Relationships to Distribute Forms by Role & Rotation	52-54	
Editing a Session <ul style="list-style-type: none"> • Edit Session Name • Change the Evaluation Form • Edit the Interval Dates • Change Session Start and End Dates • Add or Delete an Interval 	55-60	
Copying or Auto-copying Forms in a Session	60-62	

Sending Email Reminders for Evaluations <ul style="list-style-type: none"> • Enable Notifications • Customize Notification Emails 	62-65	
Monitoring Evaluations with Session Manager <ul style="list-style-type: none"> • By Evaluator • By Subject • By Rotation • By Date <ul style="list-style-type: none"> ○ All Tab ○ Completed Tab ○ Delinquent Tab ○ Pending Tab 	65-71	
Evaluations Icon Key	71-72	
Placing Evaluations On Hold <ul style="list-style-type: none"> • Placing Evaluations on Hold in a Session • Automatically Release Evaluations On Hold • View & Release On Hold Evaluations • Return Released Evaluations to On Hold 	72-73	

Evaluations-Manage Distribution

Section	Pages	Recommended Webinar
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Adding Manual Matches to Evaluations	4-5	Help>Tutorial Videos>Evaluations [8.12 Evaluations-Matching
Creating Matches for Past Intervals	6	
Changing an Evaluation's Available or Due Date	7	
Editing a Completed Evaluation	8	
Sending a Declined Evaluation Back to the Evaluator	9	
Viewing Evaluation Match & Automated Email History	10-11	
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Evaluations Module -Reports

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Intro to Evaluation Reports	5	
Access Levels for Reports	5	
Navigate to Reports <ul style="list-style-type: none"> • Program Selection • Person Search • Print 	6-7	
Assessment Settings <ul style="list-style-type: none"> • Access Configuration • Turn normalization off/on • Make “has not achieved Level 1 count as zero • Allow subjects to view peer averages 	7-9	
Filtering Forms and Date ranges <ul style="list-style-type: none"> • Filter by Date • Identify Evaluators 	10	
Printing Completed Evaluations <ul style="list-style-type: none"> • Printing from view evaluations • Printing from session manager 	11-12	
Report on GME-Level Evaluation Data	12-13	
Resident & Fellow Reports <ul style="list-style-type: none"> • Program Level View • Performance Report • Competency Report • Compliance Report • Subcompetency Report • Osteopathic Milestones • Overall • Tags • Comments • Subcompetency • Milestones • Competency • Problems • Compliance • Exportable Data 	13-32	Help>Tutorial Videos>Evaluations [8.30] Evaluations- Reports- Residents
Reporting on Evaluations of Rotations	33-34	Help>Tutorial Videos>Evaluations [8.32] Evaluations- Reports- Rotations

Rotating Residents Reports <ul style="list-style-type: none"> • Performance Report • Competency Report • Overall Report • Tags Reports • Comments Report • Competency Report • Problems Report • Exportable Data 	35-43	
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GME & Program Level Faculty Evaluation Reports <ul style="list-style-type: none"> • Performance Report • Compliance Report • Individual Faculty Evaluation Reports • Overall Report • Tags Report • Comments Report • Grading Profile Report • Problems Report • Exportable Data 	49-65	Help>Tutorial Videos>Evaluations [8.31] Evaluations- Reports-Faculty
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