New Innovations (RMS) Evaluation FAQs

MMCGME

Metro MN Council on Graduate Medical Education

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FAQ: Why aren't my sessions matching?
Troubleshooting Evaluation Matches

There can be many reasons why your session is not matching. Make sure these items are in place:

The Block Schedule
- Both Evaluator and Subject on schedule
  - on the same rotation name
  - during the same time period
  - have the Status Type selected in the session

The Session
- Correct Status Types are selected
- All of the rotations that should match are selected
- The rotation ends **within** the session interval
- People from outside departments selected

Below are some common problems and solutions:

 Example A

Problem: No block schedule has been created for residents and faculty.

Solution: Build a block schedule for residents and faculty

1. Go to *Schedules > Schedule Rotations*
   Select a person

2. Select an Option (Options 1 & 2 are typically used for residents/fellows. Option 3 is used for faculty)

3. Select the rotation(s)

4. Click **Save**

Start Date	6/1/2016
End Date	6/30/2016
Person Status	PRG 1
Rotation Department	Rotation Favorites
Rotation	FM:AmbGyn-SC (Department of Family Medicine/FM-Family Medicine)
Primary	✔
Work Load	100
Compensation Status	---
Home Department	Department of Emergency Medicine/Emergency Medicine
Program	Endocrinology
Post Graduate Year	---
Person Pager	(330) 899-9954
Rotation Pager	---
Notes	

Remaining Characters: 500

Notes:

● To save this interval, click "Save" at the bottom of the screen

● If this is not what you intended to do, please click "Cancel" at the bottom of the screen instead of using the browser's back button

Save | Cancel

Example B

Problem: People on the ABC Rotation are not getting evaluations to complete.

Solution: Include the ABC rotation in the session and rematch the session. In the Rotations tab, the rotation name is not in the box marked Active Rotations. If the rotation isn't in this box, the system will not consider the rotation in the matching process.

1. Go to *Evaluations > Session Manager*
2. Click on the name of your session
3. Click the **Rotations** tab
4. Move the ABC rotation Available Rotations (left) to the Active Rotations (right).
5. Click **Save Changes**
6. Click the **Match Schedule** tab
7. Check the box(es) in front of the interval you want to rematch
8. From the 'More' drop-down list, click **Match**

Example C

Problem: I want my residents to evaluate the PD, but the residents tell me they don't have the PD in their list of evaluations.

The status types selected on the People tab are incorrect.

Solution: Edit your list of status types to include the Program Director status

1. Go to *Evaluations > Session Manager*
2. Click on the name of your session
3. Click the **People** tab
4. Select your **Evaluator Status Type**
5. Select your **Subject Status Type**
6. Click **Save Changes**
7. Click the **Match Schedule** tab
8. Check the box(es) in front of the interval you want to rematch
9. From the 'More' drop-down list, click **Match**

FAQ: Which types of questions can be mapped to milestones?

What kind of tags or mapping can be applied to the different types of questions on my evaluation forms?

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

You may add <u>custom tags and Core Competency tags</u> to any of these types of questions:
(Core Competency tagged results do NOT appear in CCC Milestone Reviews. That requires subcomp tags or mapping)
- Rating
- Multiple Choice
- Text
- Yes/No
- Number
- NOT EPA (they are mapped)
- NOT Milestone narratives (they are mapped by default)
- NOT published Subcompetencies (they are mapped by default)
- NOT Custom Subcompetencies (they are mapped)

FAQ: I just created a form for my program evaluation but when I start building my session, I can't find it.

If there are no forms in your list, you probably built your Program Form as a standard evaluation form instead of using the Program Evaluation option. Program Evaluation forms are built separately from standard forms because Program Evaluation reporting is different than the standard reports. To create a form to use in Program Evaluations, go to *Evaluations > Program Evaluation Forms* in the software.

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FAQ: Why does the 'N/A' option on my evaluation form have a value? It's skewing the averages.

When creating a grade scale, do not include N/A as one of the option because the system assigns a value to it. If an evaluator selects 'N/A', the value is added into the averages.

The correct way to add the 'N/A' option to your evaluation form is when you are building it. When adding a question, there is a separate option for 'N/A'. This response will not have a value attached and will not affect the averages shown on reports.

There is not a way to go back and correct those evaluations that have already been completed. However, you can correct the form to have a new correct grade scale for future evaluations.

1. Copy the existing form and insert a new component
2. Go to *Evaluations > Evaluation Forms*
3. Find the form in the list and click **Copy** from the Actions dropdown list
4. Find the question with the incorrect N/A option and select **Delete** from the Edit options (hover over the question)
5. Select **Add a Component**
6. Select the type of question from the General types of question
7. Re-enter the text of the original question
8. Enter the labels for each value
9. Check N/A and change the label if you want something other than 'N/A' displayed for the evaluator
10. Check additional options as needed
11. Click **Add**
12. When all of the questions have been corrected, click **Done**

Replace the new form in the Session

1. Go to *Evaluations > Session Manager*
2. Select the session that uses the form with the wrong N/A option
3. Go to the **Evaluation Form** tab
4. In the Current Form drop-down list, select the new form
5. Click **Save Session**

The new form with the correct grade scale will be distributed for any matches made in the future. However, you may have existing matches that have the old form. Rematch each interval of your session by clicking "Match Interval" and the new form will be assigned to these matches.

FAQ: Why can't a faculty member see an evaluation to complete when the administrator can see it?

This is typically caused by one of three things:

1. The Available Date is in the Future

How to check:

1. Go to *Evaluations>Session Manager*
2. Click on the name of the session
3. Click the **Match Schedule** Tab
4. Click the interval in which the match exists
5. Check the Available Date
6. If the available date is in the future for the interval, click **Edit Interval**
7. Change the Available Date
8. Click **Save**

2. The faculty member has multiple records in the database and the match was probably made with the record that they are not logging into.

How to check:

1. Go to *Personnel > Personnel Records*
2. Type the person's name In the search box
3. The system will return details about all records found

How to manage duplicate records:
Each person should only have one demographic record in a database. Even if a department does not own a faculty member's record, an administrator can still create matches to their trainees without creating a second record in the session.

If you do find that there are duplicate records, and you have a level 6 administrator in your database such as a GME administrator, contact them and ask them to combine the duplicate records. If you do not have a level 6 administrator in your database, click *Help>Contact Us* to ask New Innovations for assistance. (Go to *More>Lists>Administrator Directory* to see if you have a level 6 administrator)

3. The session applied a feature called "Evaluations are for administrative use only"

This feature means that the evaluator will not see the evaluation to complete. Typically this is used when an administrator has collected paper copies of evaluations, perhaps in a meeting, and they wish to enter the results on behalf of the evaluators.

How to check:

- Go to *Evaluations>Session Manager*
- Click the **Settings** tab
- Check **Show advanced settings**
- Under Administrative Options see if the option 'Evaluations are for administrative use only' is checked
- If it was selected in error, un-check the option
- Click **Save Session**

FAQ: Why can't I check the box for "Email Notifications are enabled" in my session?

Your session has enabled an option called "Evaluations are for administrative use only". This option prevents pending evaluations from displaying to the evaluator and no emails are sent.

How to check:

1. Go to Evaluations>Session Manager
2. Click the Settings tab
3. Check **Show advanced settings**
4. Under Administrative Options see if that option is checked
5. If it was selected in error, un-check the option
6. Click Save Session

FAQ: Why do all of my automatic matches show the date of the interval and not the dates that the evaluator and subject worked together?

The option to display the interval dates for matches instead of the rotation period shared between the evaluator and subject has probably been selected in the session.

How to check:

- Go to *Evaluations>Manage Sessions*
- Click on the name of the session
- Click the **Settings** tab
- Check 'Show advanced settings'
- Under Display Options, change this option "Which dates should be displayed on the form" to Match Dates instead of Interval Dates
- Click **Save Session**

FAQ: Can I be notified when an evaluation has been completed?

One way to be notified when an evaluation is completed is to use the session setting "Place completed evaluations on hold for administrative review". When used, upon completion by the evaluator, if email notifications are enabled, an email is sent to the administrator in the consolidated email to advise that an evaluation has been completed. Once reviewed, the administrator can release the evaluation from hold.

To put evaluations On Hold:

- Go to *Evaluations>Session Manager*
- Click on the session name
- Click the **Settings** tab
- Check the box at the bottom that reads "Show advanced settings"
- Check the box that reads "Place completed evaluations on hold for administrative review"
- Click Save **Session**

A second way to be notified of a completed evaluations is to set yourself or a Program Director as a required signature for the evaluation immediately following the evaluator.

FAQ: My Program Director has level 5 privileges in evaluations. Does that mean she will be able to see identifying information on anonymous evaluations where he is the subject?

No. Even though she has level 5 privileges, the system recognizes that she is the subject of the evaluation, so all identifying information is stripped from his view.

If the evaluation is about the PD and the session is set to "hide" from the subject, then the PD will NOT be able to see the evaluation from the View Evaluations area. They will also NOT be able to see the results under Evaluation > Reports and look under their name.

What the PD WILL see (because they are Level 5) is the match in the Session. If they look in the session manager, they will be able to place a check next to it and View; however, the name of the evaluator will show "Anonymous".

FAQ: How can I change the rotation name appearing on a completed evaluation?

Once an evaluation has been completed, there is not a way to make changes to the match details which are:

- evaluator name and status
- subject name and status
- start and end date
- rotation name

The only way to do this would be to:

1. print out the completed evaluation
2. delete the completed evaluation
3. re-create the match with the correct details
4. complete the evaluation per the paper copy on behalf of the evaluator

FAQ: Why are there two evaluation form names in my session?

When a match is made either automatically or manually, the form sent to the evaluator is the current form selected in the session on the evaluation forms tab.

If however, a feature called evaluation form relationships was configured to dynamically send a different form based upon a particular status of evaluator or subject or rotation name, and a match meets these parameters, the current form will not be used. This applies only if the session does *not* have the box checked that reads "Disregard relationship and use the current form".

If you see multiple form names, it means that matches in the session were created using more than one form. It could mean that another form was used for some matches due to configured form relationships. The other reason this could occur is if you matched a session using the current form and then later changed the current form. When the current form is changed, it does not retroactively apply to matches already made, but only applies the new form to future matches.

To see which form applied to a match follow these steps:

- Go to *Evaluations>Session Manager*
- Click the name of the session
- Click the Match Schedule tab
- Click the name of the interval
- Check the box that reads "Show evaluation forms"

Faculty Evaluation of Resident

Interval 1	0 matches	n/a	Available Date: 7/24/2016

All	Delinquent	Completed	Pending Signatures	Declined

🔍 View   ☐ Hide evaluator info   Actions ▼

☐	Evaluator	Subject	Evaluator Status	Subject Status

If a match is still pending and the wrong form is used, you will need to fix the condition that applied the wrong form first. You can then delete the match and recreate it, which will apply the current form.

FAQ: Why can't I find the rotation I need in the drop down box when I am creating a manual match?
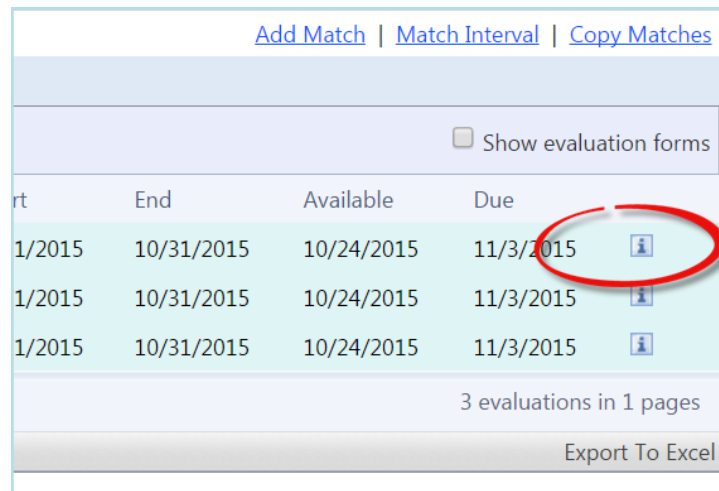
When you create a manual match, your selections are limited to only those rotation names that you have included in the active rotations box on the rotations tab of the session. Go to the rotation tab in your session and move over the selection you need from the Available Rotations box to the Active Rotations box using the directional arrows, and then click **Save Changes.**

Now, when you go back to create your match, that rotation will appear.

FAQ: How can I tell if someone received an email notifying them of an evaluation they need to complete?

This information can be found by going to the match page:

- Go to *Evaluations>Session Manager*
- Click the arrow to the left of the session name
- Click the interval name where the match resides
- Click the information icon

- Click the tab labeled "Automated Email history"
- Click **Show Full Message** to see the full excerpt of the email related to this evaluation

Sometimes automated emails can end up in a spam folder. It is important to also remember that evaluators don't need an email to complete an evaluation. If they log into the suite conventionally, on their home page under notifications they will see a link to the page where all of their pending evaluations can be found.

FAQ: Why is the Declined option not available on an evaluation?

There are reasons why an evaluator can't decline evaluations:

1. The session that initiated the evaluation has configured an option preventing Declined submission. Here is how to check:
    - Go to *Evaluations>Session Manager*
    - Click the name of the Session
    - Click the Settings tab
    - Place a check in the box labeled "Show advanced settings"
    - Under Administrative option check to see if the option "Do not allow evaluators to decline evaluations" is checked
    - Uncheck the option to allow evaluators to decline evaluations and click **Save Session**
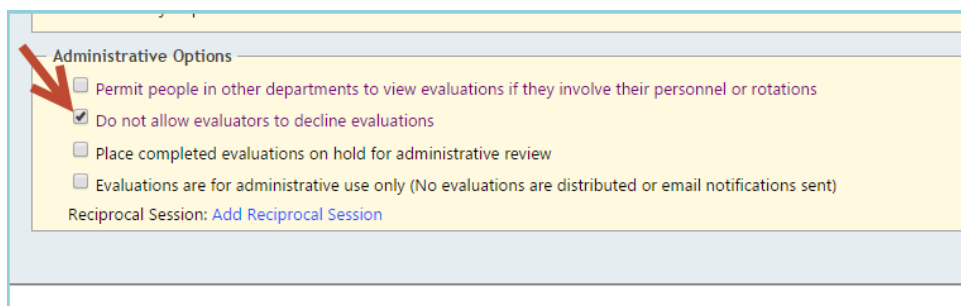
2. The evaluator already marked the evaluation as Declined and an administrator returned it to the evaluator. Once this occurs, the evaluator can no longer mark that same evaluation Declined.
3. Any Evaluation of Program *can't* be declined

FAQ: Why can't an advisor see advisee's completed evaluation?

There are four possible reasons an advisor cannot see an advisee's completed evaluations:

1. The advisee's demographic record does not reflect them as the advisor

How to check:

- Go to Personnel>Personnel Records
- Choose the resident's name from the drop down box
- Click **Basic Information**
- Scroll to the Advisor field

2. The evaluation is anonymous and the advisor has been blocked from seeing the evaluation via a session setting

How to check:

- Go to *Evaluations>Session Manager*
- Click the by Subject tab
- To the left of the subject name click the arrow
- Click on the name of the session listed for the match in question
- Click the Settings tab
- Under Anonymity Settings if Subject, Elective or Total Anonymity is chosen, look for the check box under Access to Completed Evaluations labeled "from the subject Advisor (if you uncheck, make sure to **Save Session**)

3. The evaluation is from a session marked "Hold for Administrative View" and the evaluation has yet to be released by an administrator.

How to check:
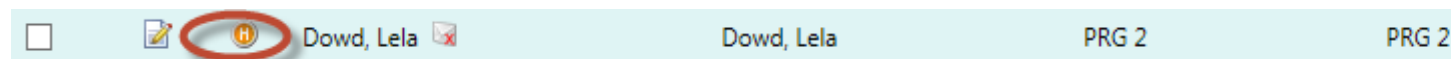
- Go to *Evaluations>Session Manager*
- Click the by Subject tab
- To the left of the subject name click the arrow
- Click on the name of the session listed for the match in question
- Click the interval name that contains the match
- Notice if the match contains that "H" icon which indicates that it is on hold

		Dowd, Lela		Dowd, Lela	PRG 2	PRG 2

4. The evaluation, although completed, is lacking additional signatures.

   How to check:

- Go to *Evaluations>View Evaluations*
- Click the Pending Signatures tab
- Select, Session, Subjects and Missing Signatures to locate the match in question
- Click **View List**
- Place an x in the box to the left of the match in question
- Click **View Selected Evaluations**
- Notice the bottom of the page where the missing signatures will be detailed

This evaluation is pending the Subject's Signature

Evaluation Submitted on 1/18/2006 6:34:00 PM EST.

Exit

FAQ: What do the different colored matches mean?

The different colors indicate how the match was made:

- No color = match was created automatically by the system
- Aqua = match was manually created by the session administrator
- Yellow = match was made by the evaluator in an on-demand session
- Pink = match was made by the subject in an on-demand session

FAQ: How do I release an evaluation that is 'On Hold?'

To release evaluations that are 'On Hold' for administrative review:

1. Go to *Evaluations > View Evaluations*
2. Click the "On Hold" tab
3. Select the desired academic year
4. Select the session, evaluator and subject
5. Click **View List**
6. Click **Release Selected Evaluations**

FAQ: Why is my evaluation blank?

A blank evaluation occurs when:

- Only rotation-based subcompetencies are added as questions and
- Some part of the evaluation process is missing such as:

    a) The rotation name is missing from the match - In this case, since the rotation name is missing, the software doesn't know which subcompetencies to add to the form. Edit the match to include a rotation name.

    b) The rotation has not been mapped to subcompetencies - If the rotation has not been mapped, the software doesn't insert any subcompetencies onto the form. Go to *Evaluations > Milestones*. Click **Configure** on the Rotation panel. Select a Rotation and map to the subcompetencies.

FAQ: I've set up quarterly intervals, but I'm getting monthly matches. Why?

This is sometimes an issue for fellowships that only have quarterly evaluations of their fellows. For example, the block schedules for the fellows are created on a monthly basis, but the session has quarterly intervals. There should be only one evaluation distributed covering 3 months, but instead the session is distributing 3 evaluations (one for each month in the quarter).

In this case we'll use the Advanced Settings to solve this problem:

1. Go to *Evaluations > Session Manager*
2. Click on the name of the session
3. Click the Settings tab
4. Check the box for 'Show advanced settings'
5. In the Match Options section, check the box for 'Create only one match for an evaluator/subject pair
6. In the Display Options section, click the radio button to display the date range 'for the session interval'
7. Click **Save Changes**

Rematch Interval

You will probably need to rematch the interval to get the right dates on the matches. Here are the steps to do that:

1. Go to *Evaluations > Session Manager*
2. Click on the name of the session
3. Click the Match Schedule tab
4. Check the box(es) in front of the intervals that need to be rematched
5. Click **More > Match**
6. Click on an interval to check out the matches for that time period

FAQ: How do I send an email with an auto-login link to evaluators, if the evaluations are not delinquent?

This is a scenario about timing.

A little background information first about the 'Available Date' - The 'Available Date' on an interval is the day the evaluations become available to the evaluator. That evening, an email is sent to the evaluator informing them that they have an evaluation to complete.

If you have created a session that is already past the 'Available Date,' but it is not yet to the 'Due Date,' no initial email notification will be sent to the evaluator letting them know that they have an evaluation to complete. The first time they become aware that they have an evaluation to complete is when the 'Due Date' passes and they receive an email letting them know they are delinquent in completing the evaluation. That's not very nice.

So you can change the 'Available Date' to today which will trigger an initial email to be sent tonight to the evaluator.

Here's how to change the 'Available Date' for an interval and for **all** matches within it:

1. Go to *Evaluations > Session Manager*
2. Click on the session name
3. Click on the Match Interval tab
4. Check the box in front of an interval
5. Click **Edit**
6. Change the Available Date to today (Note: If the Due Date has already passed as well, extend the Due Date to a date in the future.)
7. Click **Save**

Add New Interval

	Interval Name		Match	Available	Start/End
☐	Interval 1	25 matches	7/20/2015	7/24/2015	7/1/2015 - 7/31/2015
☐	Interval 2	30 matches	8/20/2015	8/24/2015	8/1/2015 - 8/31/2015
☐	Interval 3	34 matches	9/19/2015	9/23/2015	9/1/2015 - 9/30/2015
☐	Interval 4	34 matches	10/20/2015	10/24/2015	10/1/2015 - 10/31/2015
☐	Interval 5	36 matches	11/19/2015	11/23/2015	11/1/2015 - 11/30/2015
☐	Interval 6	32 matches	12/20/2015	12/24/2015	12/1/2015 - 12/31/2015

Interval Name	Start	End	Available	Due	Stop Delinquent Email		
Interval 6	12/1/2015	12/31/2015	12/24/2015	1/10/2016	6/30/2016	Save	Cancel

Notes:

- If you're using the Auto-Copy feature on the Match Schedule tab, be careful to change the dates back to the normal setting.

FAQ: How do I change the type of session from eval of a person to eval of a rotation?

The type of session is something you cannot change once you've save it. Each type of evaluation - People, Rotation and Program - have their own configurations that are presented to you as you create the session. This is why you cannot change the type. Please delete the session with the incorrect type and create a new one with the correct type.

FAQ: In my session, why does my People tab have N/A on the subject side?

The session is a Rotation Evaluation. When you set up a session type as 'Rotation', the subject is N/A because the rotation itself is what is being evaluated. When the match is made, you will see the rotation name in the match on the match schedule tab.

FAQ: Why does my resident have the wrong status on a match?

At the time that the match is created, the software looks at information on the block schedule to determine the status type. If a resident has the wrong status on an evaluation match, we suggest checking the status on the block schedule for the evaluation time period.

If the match is still pending, you can correct the status:

If the match is completed there is not a way to correct the status unless you print out the completed evaluation, delete the match, re-create the match and then record the results on behalf of the evaluator.

You will want to correct any status types that are incorrect in the resident's block schedule to prevent the same thing from happening for future blocks.

FAQ: Why don't I have the option to include outside subjects in my session?

This is because the form that chosen in the session is a shift card. Shift card evaluations are limited to subjects from your department so you do not have the option to include subjects from other departments.

To check this:

- Go to *Evaluations > Setup > Milestones*
- Click **Configure** in the Shift box
- Click **Configure Evaluation Forms**
- Notice that the green box reads "Shift" to the left of your chosen form
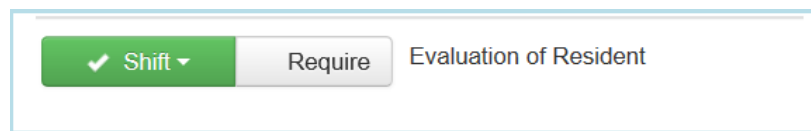
FAQ: An evaluator is trying to submit an evaluation but it only saves as draft.

Most often, when the evaluator is using Google Chrome as their internet browser, they will receive a pop-up box when they click the submit final link. The pop-up box asks them to confirm they want to submit final. In addition, the pop-up contains a checkbox giving them the opportunity to prevent future pop-up boxes. If they check this box, the submit final pop-up will no longer display when they attempt to submit an evaluation. This causes the evaluation to be saved as a draft.

To get the pop-up dialog box to come back, they will need to close out of Google Chrome completely and then relaunch it. Log back in to New Innovations and submit the evaluation.

If this is not your issue, please submit a support ticket for individual assistance.

FAQ: I am not able to see evaluations. I click View but nothing happens.

When you click a button or link and nothing happens, it may be related to a pop-up blocker in your internet browser. Please use the following instructions for the browser you are using:

Google Chrome
1. Open Chrome
2. In the top-right corner, click the Chrome menu ≡
3. Click **Settings**
4. At the bottom of the page, click **Show advanced settings**
5. Under "Privacy," click **Content settings**
6. Under "Pop-ups," select **Manage exceptions...**
7. Add www.new-innov.com to the list

FireFox
1. Click the **menu button** ≡
2. Choose options
3. Select Content Panel
4. In the content panel below Pop-ups, uncheck the box nest to Block Pop-up windows to disable the blocker altogether
5. Click on **Exceptions...** to designate which sites to still allow pop-ups to be blocked

Safari on a Mac
1. Open Safari
2. In the top left, select "**Safari**," then select "**Preferences**" from the drop down menu
3. The preferences pane will open and select "**Security**" on the top row
4. Uncheck the the "**Block pop-up windows**" box

Microsoft Edge
1. Open Edge
2. In the top-right corner, click •••
3. Click **Settings**
4. Click **Cookies and site permissions**
5. Click **pop-ups and redirects**
6. Scroll to Allow and click **Add**
7. Type www.new-innov.com and click Add

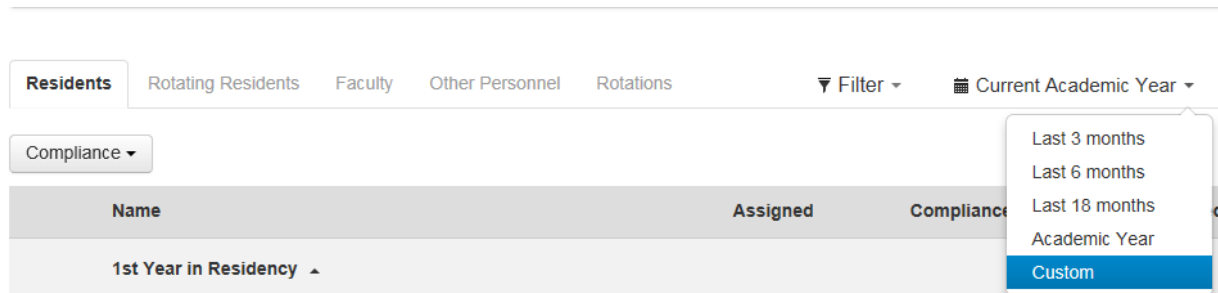## FAQ: Is there a way to determine the percentage of evaluations that have been completed by my program?

Yes, you can view the overall Compliance by going to:

- Evaluations>Reports
- From the Resident tab where you see "Performance" select "Compliance".

At the bottom of the screen you will see the totals for the entire academic year.

	Stanley, Brenda	1	0/1 (0.00%)	0 (0.00%)
	2nd Year in Residency (AD- MED PEDS) ▲			
	Murphy, Joyce	0	-	-
	Total:	9	1/9 (11.11%)	1 (11.11%)

Should you wish to isolate compliance for a specific month or another academic year, click the link "Current Academic Year" to either choose a different year or create your own date range by selecting "Custom".
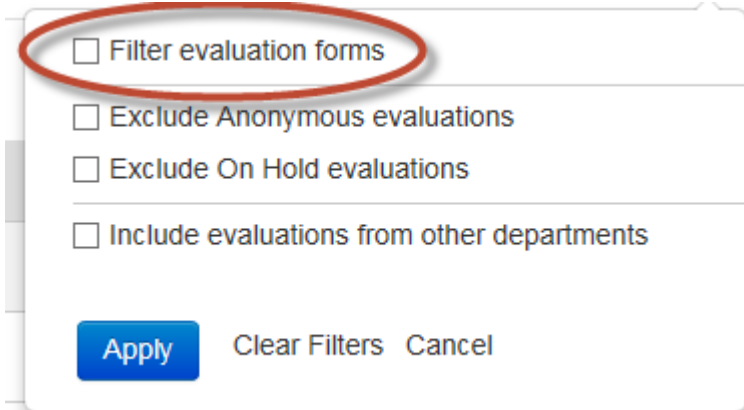
Residents	Rotating Residents	Faculty	Other Personnel	Rotations	▼ Filter ▾	📅 Current Academic Year ▾
Compliance ▾						Last 3 months
						Last 6 months
Name			Assigned	Complianc		Last 18 months
1st Year in Residency ▲						Academic Year
						Custom

FAQ: How can I generate an evaluation report for results from a specific form?
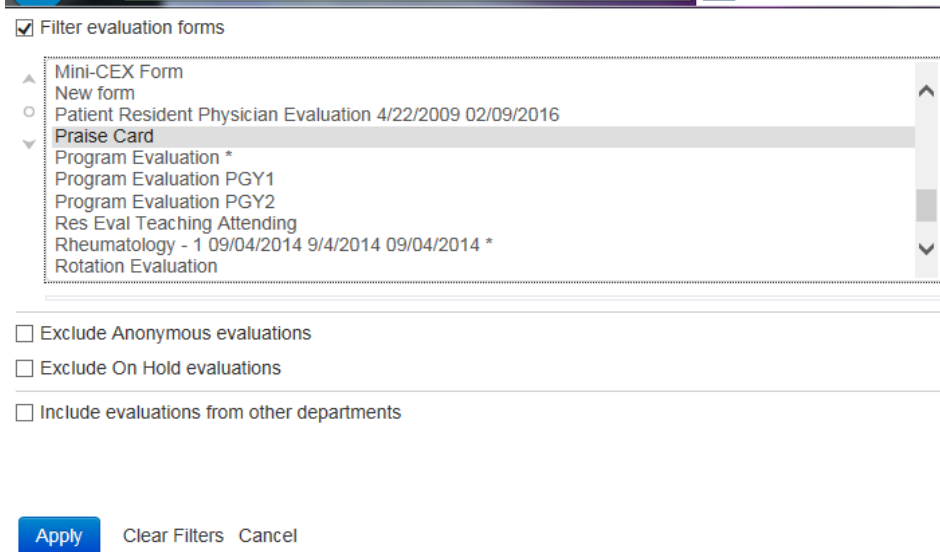
You can filter the Evaluation Reports to generate results for specific evaluations.

1. Go to **Evaluations** > **Reports**
2. Click ▼ Filter ▾
3. Check "Filter evaluation forms"

☐ Filter evaluation forms

☐ Exclude Anonymous evaluations

☐ Exclude On Hold evaluations

☐ Include evaluations from other departments

Apply   Clear Filters   Cancel

4. Select the form you need and click **Apply**

☑ Filter evaluation forms

```
Mini-CEX Form
New form
Patient Resident Physician Evaluation 4/22/2009 02/09/2016
Praise Card
Program Evaluation *
Program Evaluation PGY1
Program Evaluation PGY2
Res Eval Teaching Attending
Rheumatology - 1 09/04/2014 9/4/2014 09/04/2014 *
Rotation Evaluation
```

☐ Exclude Anonymous evaluations

☐ Exclude On Hold evaluations

☐ Include evaluations from other departments

Apply   Clear Filters   Cancel

FAQ: Why is my faculty member's department wrong on a completed evaluation?

 What you are likely seeing is the program name underneath their name on the completed evaluation. If your faculty member has a faculty appointment in another program and you have not given them an appointment in their home program, that other program name will be listed under their name. This can be fixed by simply giving them an appointment in their home program. After you do this and subsequently view the completed evaluation, the correct program will appear.

FAQ: Rotation Relationships are not working in a session with mapped rotations.

When you mapped rotations between evaluator and subject, the link between the evaluation form relationships and the rotation is severed. Rotation mapping overrides evaluation form relationships.