How to Manually Match Faculty & Residents Tip Sheet

Go to Evaluations > Sessions Manager

- 1. Click on the session where you want to add matches
- 2. Go to the Match Schedule tab
- 3. Add matches to one or multiple intervals:
 - Add to one interval:
 - a. Click on the interval name
 - b. Click Add Match in the upper right corner
 - Add to multiple intervals—not available for evaluations of programs:

a. Click Add Matches to Intervals

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| Aut | omatic Matching | | | | | |
| | Enable Automatic Matching - the system | n will automatically create ma | atches with personnel on | the department block schedu | le for each interval. | |
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- 2. Select evaluators on the left and subjects on the right
 - To include people from other departments:

(learners in the session's department and any learners on a rotation in the session's department during the selected interval appear by default)

- a. Click Filter
- b. Select a department
- c. Click Update Results
- To view more people than those designated on the People tab, check Show all personnel
- 3. Choose an option for Match selected people to each other:
 - For most evaluation types: select excluding themselves
 - For self-evaluations: select only to themselves
- 4. If you chose to add matches to multiple intervals, check which intervals you want You won't see these checkboxes if you're adding matches to a single interval

| 🗌 Interval 1 | 🗌 Interval 5 | 🗌 Interval 8 | 🗌 Interval 11 |
|--------------|--------------|---------------|---------------|
| 🗌 Interval 2 | 🗌 Interval 6 | 🗌 Interval 9 | 🗌 Interval 12 |
| 🗌 Interval 3 | 🗌 Interval 7 | 🗌 Interval 10 | 🗌 Interval 1 |
| 🗌 Interval 4 | | | |

- 5. Check the email notification box to send an alert to evaluators *You'll only see this option if the interval is in the past*
- 6. Click **Preview** to view the matches and make edits, as needed. Click Save.
- 7. Click **Create Matches** to create the matches and go back to the match page