

The type of evaluation you're distributing can determine many of the session settings you'll want to select. This article provides suggestions per eval type for each session builder tab.

People Tab

Type of Evaluation

Faculty Eval Resident

Resident Eval Faculty

Resident Evaluation of Rotation

Statuses

Choose the statuses you use for Evaluator

- Faculty
- Attending
- PD

Subject

- Resident Statuses
- Fellow Statuses

Include Faculty from outside departments: Select all depts to make sure you get every possible match.

Choose the statuses you use for Evaluator

- Resident Statuses
- Fellow Statuses

Subject

- Faculty
- Attending
- PD

Include Res from outside programs if you want their input on your faculty

Choose the statuses you use for Evaluator Status

- Res
- Fellow

Subject Status None (the Rotation is the Subject)

Choose the statuses you use for Evaluator

- Nurse, Allied Health, PA etc.

Subject

- Resident Statuses

Evaluator and Subject statuses are the same

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360 Evaluation

Peer to Peer
Self Evaluation

Rotations Tab

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Evaluations Tab

If you name your evaluations to reflect subject and evaluator, that can help you find the right form.

Rotations

Include all rotations from your department. If you want faculty from other departments to evaluate your residents, select those departments from the Department drop-down list and include those rotations in the Active Rotations list.

Select all rotations in your department. Usually, rotations from outside departments are not included because the other departments only want their residents to evaluate their faculty.

Select all rotations you want the residents to evaluate.

This type of session is usually manually matched when nurses and allied health are not on the schedule.

Select all rotations to be used in the evaluation

Usually, this type of session is not based on the schedule and manually matched.

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Anonymity

None

Usually Totally Anonymous

Usually Anonymous to Subject (for Reporting purposes)
or Totally Anonymous

Elective anonymity or totally anonymous

Elective anonymity or totally anonymous

None

Settings Tab 

Email Settings: Enable or disable notifications to evaluators and/or Administrators.

Match Schedule Tab **Type of Evaluation**

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Matching

At the end of each rotation. Matches based on the Block Schedule

Usually at the end of each rotation. Matches based on the Block
ScheduleHowever, some institutions only evaluate faculty once or twice a year.
Create the number of intervals you use and match using the Block
Schedule

At the end of each rotation. Matches based on the Block Schedule

Create the number of intervals based on your institution or program
standards and Manually Match the session.Create the number of intervals based on your institution or program
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