

Clerkship Coordinator

E-Value

Reference Guide



Boston University School of Medicine

Christopher Vaughan

E-Value Database Management Specialist

cvaughan@bu.edu

(This guide has been adapted from the E-Value User Guide)

E*Value Quick Start

Open your browser from an Internet-connected computer. Into the Address space, type:

<https://www.e-value.net>

To log in, type in your login name and password, then click the "Login" button. If you do not have your login name or password, click "Forgot Password" and type your e-mail address into the space provided click the "Request Password" button. E*Value will send your login name and password to the e-mail address entered, provided it matches one within E*Value.

To change your password, click on the "Password Change" option on the left side of your screen. Type in your new password. Click the "Change Password" button. Passwords should be at least 6 characters in length and no longer than 10 and can be made up of a combination of letters and numbers. Passwords are not case sensitive.

To complete an evaluation, click on the "Pending" option in the "Evaluations" submenu under "Administration" on the left side of your screen. Your evaluations are grouped by activity with your oldest evaluations listed first.

Next, click on the "Edit Evaluation" link next to an evaluation. You may be required to complete the oldest evaluations first. If so, newer evaluations will remain in queue until your older ones are completed.

To remove an evaluation, click the "Suspend" link next to an evaluation. You will be prompted to provide a reason why you are requesting removal of the evaluation. This message will be sent to your E*Value administrator who will delete it from E*Value.

To save an evaluation, click on the "Save for Later" button at the bottom of the evaluation. This will save the answers but will not leave the evaluation in a pending state. You may come back to this evaluation later to make modifications before submitting it.

To submit a completed evaluation, click on the "Submit" button at the bottom of the evaluation. If you have not answered mandatory questions, E*Value will let you know and will highlight the incomplete mandatory questions in red. Once submitted, an evaluation can no longer be edited.

To view the evaluations you have submitted, click on the "Completed" button in the "Evaluations" submenu on the left side of your screen. Click on the evaluation you wish to view.

To log out of E*Value, click the "Log Out" menu button on the left side of your screen. If you leave E*Value to visit another web-site and attempt to return via the browser's "Back" button, E*Value will require you to log back in again.

Biographic Data

About

Individual user profiles are found within the **Users** section under the **Biographic Data** sub-menu under **Administration**. From this menu, you can add a new user or modify an existing user's information using the tabs available. The tabs that are available to you will depend upon the E*Value functionality that your program has chosen to use.

Biographic Data

The first thing you will see on the **Biographic Data** sub-menu is a filter for either locating an existing user or creating a new user.

The screenshot shows the 'Biographic Data' interface. It features a search filter section with the following elements: a 'Fill list from...' dropdown menu (labeled 1) currently set to 'Your Program'; a 'Return Inactive Users...' checkbox (labeled 2) which is unchecked; a 'Last names starting with...' text input field (labeled 3) followed by a 'Filter' button; and an 'Any name containing...' text input field followed by a 'Filter' button. Below these fields is a '(Select a User)' dropdown menu (labeled 4) and a 'View/Edit User' button. To the right of these is an 'Add New User' button with a question mark icon.

You can either add a new user or modify an existing user's information. Before adding a user, determine if he or she is already entered into E*Value using the process described below.

Before Adding a User

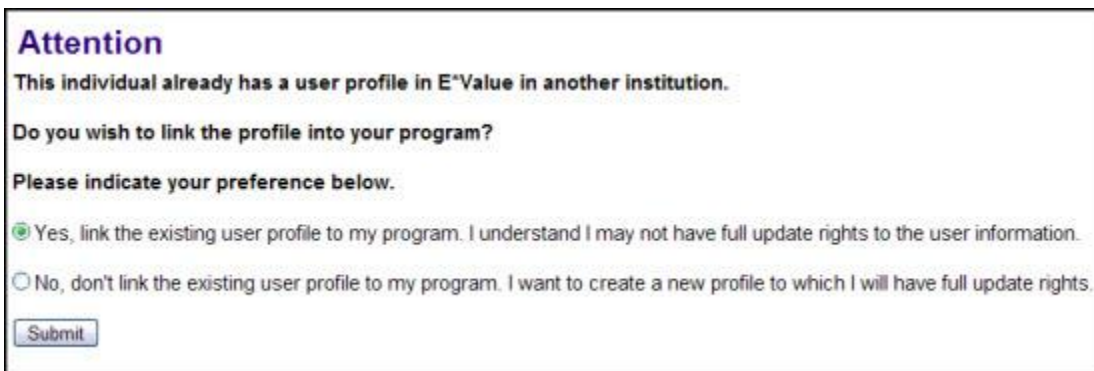
Before adding a new user, we suggest you verify that your new user has not already been added to the E*value system by another program in your institution. You can check by following the steps outlined below. If you follow these steps and determine that the user is not already added to E*Value, you can begin entering his or her Biographic Information.

1. **Fill list from:** Change this top most drop-down box labeled field to read “**Your Institution.**”
2. **Return Inactive Users:** To include users who have an 'Inactive' status in your search, select the **Return Inactive Users** check box.
3. **Last names starting with:** Enter the letter that corresponds to the first letter of the user's last name. You may enter additional letters, but it is recommended that you enter no more than the first 3 in order to catch possible spelling errors. Select the **Filter** button. The **Select a User** drop-down menu will fill with a list of all users at your institution that meet your filter criteria. Alternatively, you can filter this list using a name other than last name using the **Any name containing** field (this option tends to yield better results).

4. **Select a User:** If the person you are looking for appears in the drop-down menu, select their name and then select the **View/Edit User** button. Note that this individual will need to be linked to your program. You can link this user to your program by assigning them a “rank” in the **Biographic Information** tab.

Note: All users included in your program will display in the select box until 200 users have been entered. After 200 users have been entered, the select box will no longer pre-populate; instead, you must filter by last name in order to populate the select box with users.

Similarly, you may find that your user is already entered into E*Value under another institution. If you enter the first name, last name and email address of a user that is already in the E*Value system (exactly as it appears in the existing record) you will be prompted by this screen:



By selecting:

- **Yes:** The user's CV history from the previous institution will be imported. You will be able to view it, but not edit it.
- **No:** A new user profile over which you have complete control will be created. **Note:** The user will not be aware that he or she has two accounts. The user will be able to log in to E*Value with the login/password for your program and the login/password for the previous program.

If you encounter this situation please contact the E-Value Database Management Specialist.

Biographic Information

Select the **Add New User** button in the filter that appears at the top of the screen. You are now ready to enter your users' information on the **Biographic Information** tab.

Manage Home Program designation here. See **Home Program** below for more info.

Whether or not this link appears will depend on how your program manages custom fields and your role.

Select **View history (All)** to see a change history report for all tabs. Select **View history** to view a report for this tab.

Biographic Information

Viewing Information for Kim Montgomery:

Save Changes

[Manage Custom Fields](#)

[View history \(All\)](#) [View history](#)

Home Program:

[Al Booth University ?](#)

Required Fields appear with a red asterisk.

Legal First Name: Legal Middle Name: Legal Last Name: Previous Last Name(s):

Title: * Preferred First Name: MI: * Preferred Last Name: Credentials: * = REQUIRED

Login:
KMontgomery3

* Password:

User ID:
634916

External ID:

National Provider Identifier (NPI):

Employee ID:

SSN Prefix:
U (USA)

SSN:

Race:

Asian (not Hispanic or Latino)

Gender:
☐ M ☒ F

Inbound Rotator:
NA

Birthdate:

Birth Place:

Citizenship Country:

Visa Status:
☐ Active ☐ Expired ☒ N/A

Visa Type:
N/A

Visa Exp Date:

* Status: Current Rank:
Active Preceptor

Last Update Date:

10/19/2010

Last Updated By:

Advanced Informatics

Picture File Name:

* E-Mail Address:

db@e-value.net



Picture: ?



Notes:

To email a user, click the mail icon next to his/her address. A new mail message will open in your computer's default email program.

Custom Fields

Custom Fields will appear here

If your program is using dynamic custom fields to track info on the **Biographic Information** tab, those fields will appear here.

* = required fields

Save Changes

Next >>>

Required Fields

Although the entire user profile does not need to be filled in, there are certain pieces of information that must be entered in order for E*Value to work correctly; these fields are indicated in **bold font** in the table below.

Field	Field Description
Legal First Name Legal Middle Name Legal Last Name	These fields are used to capture an individual's legal name. A user's legal name is required when using the financial reimbursement tool, E*gme
Previous Last Names	Optional
Title	Optional, e.g. Dr., Mr., Ms.
Preferred First Name	Required field that will be used for evaluations and reporting
MI	Optional
Preferred Last Name	Required field that will be used for evaluations and reporting
Credentials	Optional, e.g. MD, RN, PhD
Password/Login Name/User ID	E*Value will assign users their login name, password and user ID ensuring no duplicates in the database. Users can change their passwords once their account has been created.
External ID	Optional
National Provider Identifier (NPI)	HIPAA has required all health care providers to have & use the NPI number on insurance forms, for credentialing physicians, etc. since May 23, 2007. If you would like to be able to include user NIP on reports, make sure it is entered here.
Employee ID	Optional
SSN Prefix	Use this field to indicate if this is an American or Canadian social security number
Social Security #	This is required for E*gme client residents only. Please use the format 100-20-3000. Please note that when this field is blank, anyone can add data to it. However, once data is entered, only users assigned the "SSN Administrator" role are able to view/edit this field. The view/edit rights apply both to the Biographic Data tool and any related reports, such as User Data Download and E*gme reports.
Race	Optional
Gender	Optional
Inbound Rotator	Once an account has been created you can flag the user as an Inbound Rotator from another program or from another institution. This information factors in when you run your reports.
Birth date	All dates require a four-digit year (mm/dd/yyyy)
Birth Place	Optional
Citizenship Country	Optional
Visa Status	Optional field with the choices Active, Expired, NA
Visa Type	Optional field with the following choices: NA, B1, B-2, EAD, F-1, Green AP, Green Card, H1-B, J-1, J-2, O-1, OPT, Perm, TN, USB, USP

Visa Exp Date	All dates require a four-digit year (mm/dd/yyyy)
Picture file	The name of the .gif or .jpg file image of the user. Electronic picture files must be uploaded.
Email address	E*Value relies heavily on e-mail to communicate with users, though users who do not utilize their e-mail accounts may participate in the E*Value Residency Evaluation System. They must simply be very pro-active about going to the web-site to do their evaluations. To email a user directly from their profile, click the mail icon next to his/her address.
Status	Active, Inactive and Pre/Post Active. The Pre/Post status can be used to enter individuals before they join your program. It can also be used after they leave, which will allow them limited access to the system depending on their Role your program's setup. Alternatively, if they should not have access to E*Value anymore, you can assign the Inactive status.
Current Rank	For example: PGY1, MS4, F2. All those who complete evaluations or who are evaluated must be assigned a rank so that the correct evaluations are created. Additionally, if the user was initially added to E*Value under another program, assigning a Rank will link them to your program as well.
Picture	To upload a picture, first click Browse to locate the file on your computer. Then click Upload . If the picture is too large, click the Resize to Best Fit button.
Notes	The notes section is a free-form area to be used as needed. You may consider using this section to communicate to other administrators in your program any changes you make to a user's biographic data.

Add New User

Once the required fields for your user are populated on the **Biographic Information** tab as indicated above, simply select the **Next** button at the bottom of the tab to add your user.

The form will repopulate with your user's data and additional tabs will appear to the right of the **Biographic Information** tab. The tabs that show may vary depending on the functionality being used by your program and your user role. For more information on these tabs, see the topics in the Additional Tabs section of this page.

Additional Tabs

After populating the required fields to add a user, you may continue to populate additional user information from the tabs available to you. Select a tab label below for more information.

As you advance through the available tabs, you can save the data for your user at any time by selecting either of the **Save Changes** buttons in the top right or lower left portion of each tab.

To create an additional user, simply select the **Add New User** button in the **Biographic Data** form to clear the **Biographic Information** tab.

The screenshot shows the 'Biographic Data' form. At the top, there are several filter options: 'Fill list from...' with a dropdown menu set to 'Your Program', 'Return Inactive Users...' with a checkbox, 'Last names starting with...' with a text input and a 'Filter' button, and 'Any name containing...' with a text input and a 'Filter' button. Below these, there is a '(Select a User)' dropdown and a 'View/Edit User' button. The 'Add New User' button is circled in red. A red arrow points to the 'Biographic Information' tab, which is the first of several tabs including 'Roles, Groups, and Specialties', 'Training and Education', 'Exam Scores', 'Contact', and 'Miscellaneous'. Below the tabs, the text 'Viewing Information for Ms Maggie Mae:' is displayed, followed by 'Home Program: GWU Interventional Cardiology' and a 'View history' link. At the bottom, there are two columns: 'Available Roles' and 'Current Roles'. The 'Available Roles' column lists 'Administrator', 'Credential Viewer', and 'Competency Administrator'. The 'Current Roles' column lists 'Trainee'. An 'Add -->' button is located between the two columns.

Adjustments

About

Occasionally a user will complete an evaluation in error and wish to correct it, or an Administrator may wish to delete pending evaluations that are no longer applicable. The **Adjustments** tool can be used to delete pending evaluations, re-open completed evaluations, as well as to delete or re-open suspended evaluations for individual users.

The first screen you see is a filter screen with search capabilities for individual users by last name. This will help you narrow down your results on the subsequent screen. This is useful for programs with a large number of users.

The screenshot shows the 'Evaluation Adjustments' form. It has a title 'Evaluation Adjustments' in blue. Below the title, it says 'Use this filter to narrow the list of users...'. There is a text input field labeled 'Last Names Starting With Filter:' and a 'Filter' button below it.

Retrieving Pending Evaluations

The screenshot shows a web form titled "Evaluation Adjustments". At the top, it says "Use this filter to narrow the list of users...". Below this is a text input field labeled "Last Names Starting With Filter:" containing the letter "b", and a "Filter" button. The main area of the form is divided into three horizontal sections. The first section has a "Users:" dropdown menu with "{Select User}" and a "Retrieve Pending Evaluations" button. The second section has a "Users:" dropdown menu with "{Select User}" and a "Retrieve Completed Evaluations" button. The third section has a "Users:" dropdown menu with "{No Users Found}" and a "Retrieve Suspended Evaluations" button. Red circles with numbers 1 and 2 are overlaid on the form. Circle 1 points to the "Users:" dropdown in the first section. Circle 2 points to the "Retrieve Pending Evaluations" button in the first section.

1. **Users:** Find the user of interest in the pull-down menu above the **Retrieve Pending Evaluations** button.
2. Click the **Retrieve Pending Evaluations** button to reveal the list of pending evaluations for that particular user.

Scroll down to the bottom half of the page and you will see a list of evaluations that are pending for the user you selected. You may delete a pending evaluation by clicking on the remove box next to the pending item in question or by clicking on the remove box in the header, which will select all. Once you have made your selection hit the **Submit** button.

Caution: Once an evaluation is removed from E*Value, it cannot be retrieved. If you have removed an evaluation in error, you will need to create a new one. You can review the evaluations that have been removed for a user with the **Reports | Miscellaneous | Compliance** report. The evaluations will be linked for the user with the status "Evaluations Suspended and Deleted;" deleted evaluations will *not* count against the user's percentage complete.

Retrieving Completed Evaluations

This screenshot is identical to the one above, showing the "Evaluation Adjustments" form. In this instance, the "Retrieve Completed Evaluations" button in the second section is highlighted with a red circle labeled 2. The "Users:" dropdown in the second section is also highlighted with a red circle labeled 1.

1. **Users:** Filter by name again, if necessary. From the middle row, find the user name in the pull-down menu.
2. Select the **Retrieve Completed Evaluations** button.

A list of evaluations that have been completed by the user will populate in the bottom portion of the screen. You may delete or open a completed evaluation. **Note:** A deleted evaluation is erased from E*Value and cannot be retrieved.

Id	Name	Time Frame	Request Date	Activity	Type	Subject	Status	Re-Open
142296	John Burns	Block 1	07/10/2009	Brain & Behavior	Course	Brain & Behavior	Completed 09/28/2009	<input checked="" type="checkbox"/>
Message to John Burns why 142296 was re-assigned/re-opened: Corrections made per email from trainee.								

Once you have clicked Re-open for the appropriate evaluation you will be given the ability to type in a message that will be sent to the evaluator. This message can give details as to why the evaluation was reopened.

Select the **Submit** button to re-open the evaluation.

Retrieving Suspended Evaluations

If a user feels they have received an evaluation inappropriately, they have the option to suspend the evaluation. When a user chooses the suspend option, they are asked for a reason why the evaluation should be removed. After submitting the suspension request, an e-mail that includes the user's suspension reason is sent to the E*Value E-Mail Administrator. Below is an example of this e-mail message:

Dear Program Administrator:

An E*Value user has chosen to suspend an assigned evaluation. Use the Eval Adjustments option to re-assign or delete this evaluation.

Following are the specifics relating to the suspended evaluation:

Evaluator: Jane Doe
 Time Frame: April 2000
 Activity: GH-Adolescent Med
 Eval Type: Clinical Educator
 Subject: Eliza Do-Little

Following are comments entered by the evaluator:

I did not interact with this attending enough to give an adequate evaluation.

When you receive a suspension e-mail message, you will need to resolve it using the **Adjustment** tool.

1. **Users:** Find the user of interest in the pull-down menu above the **Retrieve Suspended Evaluations** button.
2. Click the **Retrieve Suspended Evaluations** button to reveal the list of suspended evaluations for that particular user.

Depending on the reason for suspending the evaluation, you may take one of two actions. You may either permanently delete the evaluation from the user's pending list, or re-assign the evaluation back to the original evaluator (in the event that they should not have suspended the evaluation).

- To re-assign that evaluation back to the user who suspended it, check the box marked **Re-Assign**. You will be given the ability to type in a message that will be sent to the evaluator. This message can give details as to why the evaluation was reassigned.
- To delete the evaluation, check the box marked **Remove**.

Caution: Once an evaluation is removed from E*Value, it cannot be retrieved. If you have removed an evaluation in error, you will need to create a new one. You can review the evaluations that have been removed for a user with the **Reports | Miscellaneous | Compliance** report. The evaluations will be linked for the user with the status "Evaluations Suspended and Deleted;" deleted evaluations will *not* count against the user's percentage complete.

Once an action is selected, you must select the **Submit** button for the action to take place.

Enter Eval Answers

The **Enter Eval Answers** tool can be used to review and complete open evaluations for participants in your program.

Begin by filtering for the evaluation, as described below:

The screenshot shows a web form titled "User Evaluation Summary". It contains several input fields and dropdown menus, each with a red circle and a number indicating a step in the filtering process:

- 1. Start Date: 06/29/2010
- 2. End Date: 09/29/2010
- 3. Site: {All Sites}
- 4. Activity Group: {All Activity Groups}
- 5. Activity Filter: {All Activities} (with a Filter button and a question mark icon)
- 6. Activity: {All Activities}
- 7. Evaluation Type: {All Types} (with a list of options: 112A, 113A, APPE Case Presentation)
- 8. Evaluator Rank: {All Ranks Combined} (with a list of options: {All Ranks Listed}, MS3, MS4)
- 9. People Groups: {All Groups}
- 10. Last Name Filter: {Active Users} (with a Filter/Refresh button and a question mark icon)
- 11. Evaluators: {All Users}
- 12. Next --> button

1. **Start and End Dates:** Enter a time frame for the evaluation.
2. **Site:** Select a site for the evaluation.
3. **Course Group:** You can filter by Course Group using the drop-down menu.
4. **Course:** You can filter by Course using the drop-down menu provided. You can use the **Course Filter** text field and button to narrow the list of courses included in the **Course** drop-down menu.
5. **Evaluation Type:** You can filter by evaluation type by selecting a type from the list.
6. **Evaluator Rank:** Select an Evaluator Rank from the list to narrow the list of people in the **Evaluators** drop-down menu.
7. **People Group:** Select a group from the list to narrow the list of people in the **Evaluators** drop-down menu.
8. **Evaluators:** Select an evaluator from the drop-down menu. You can use the **Last Name Filter** text box and **Filter** button to narrow the list of users in this list.
9. Select the **Next** button to review evaluations matching your filter criteria.

Who Did You Work With

Evaluate Instructions for Students

In order to ensure that we obtain a fair and representative picture of your clinical performance, students are required to obtain a clinical evaluation at the end of every shift in some clerkships. Towards the end of their shift, they need to let their primary preceptor for the shift know that

they will be requesting an evaluation for the shift. Their team leader/attending will typically be the one to evaluate them, but they may request an evaluation from their attending or from another team member if they worked closely with this person during the shift.

They will request evaluations through E-Value, using the “Who Did You Work With” function. This function will allow them to enter the name of their preceptor for the shift, and will generate a form for them to complete about their preceptor’s teaching skills, and one for the preceptor to complete about the student’s clinical performance.

If students encounter technical problems with E-value, please notify Christopher Vaughan (cvaughan@bu.edu) immediately.

Here are the steps to follow in order to generate and fill out that evaluation immediately.

1. Log onto evalue (if you have forgotten your log-in please ask Ms. McCann to send you a reminder).
2. Go to **USER MENU** – left of navigation bar
3. Click **Evaluations: On the Fly**
4. Evaluation Type: **Who Did You Work With?**
5. Who – Don’t worry about this step – it’s automatic
6. **Activity Site** – Choose BMC
7. **Time Frame** – Choose Block Dates that you were involved in.
8. **Click next** - Who do you work with Evaluation will appear!
9. Complete this evaluation by choosing whom you worked with – your choices include the names of current attending physicians, fellows and residents.

1. Go to **USER MENU** – left of navigation bar
2. Click **Evaluations: Pending**
3. A list of all queued evaluations will appear.
4. Find and complete the evaluation for your attending physician or resident preceptor.

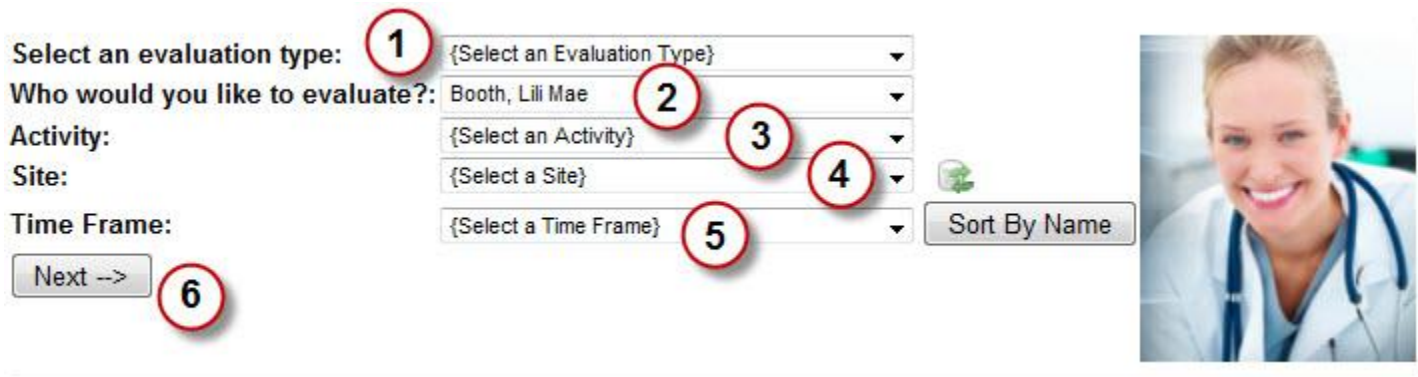
In certain circumstances, paper evaluations may be necessary. If there are technical difficulties with the E-Value system, if you work with an off-service preceptor or a preceptor who is for some reason not in the system, or if your preceptor simply prefers a paper evaluation, this is okay. Instructions for paper evaluations:

- For all paper evaluation forms, *please print the student's name, the date, and their evaluator's name legibly on the evaluation form.*
- Students' must notify the clerkship coordinator via email of all outstanding paper evaluations. If their preceptor fails to complete the evaluation form, they will not be held responsible. If, however, they fail to let the coordinator to know that you have requested the evaluation, the student will be held responsible, and it will be as though they never worked the shift.
- Ideally, their preceptor will complete the evaluation and return it to them before the end of their shift. If this does not occur, that is okay – as long as you notify the clerkship coordinator as above.
- Paper evaluation data will be entered into E-Value and will be visible there along with electronic evaluations at the end of the clerkship

On-the-Fly

About

On-the-fly evaluations allow you to initiate and complete an evaluation on someone within your program that you have not been pre-scheduled to evaluate. For example, you may want to use an on-the-fly evaluation to create Praise or Concern Cards for exemplary or concerning performance.



The screenshot shows the 'On-the-Fly' evaluation form in the E-Value system. It features several dropdown menus and buttons. Numbered callouts indicate the following steps:

- Select an evaluation type:** Points to the first dropdown menu.
- Who would you like to evaluate?:** Points to the second dropdown menu, which currently displays 'Booth, Lili Mae'.
- Activity:** Points to the third dropdown menu.
- Site:** Points to the fourth dropdown menu.
- Time Frame:** Points to the fifth dropdown menu.
- Next -->** Points to the button at the bottom left of the form.

Additional elements include a 'Sort By Name' button on the right and a small profile picture of a female doctor next to the 'Who would you like to evaluate?' dropdown.

Note: Certain terms that appear on this screen can be translated for our program and therefore may not match the image above.

1. **Select an evaluation type:** Select the evaluation type you would like to create. The available types will depend on the rank you are assigned in E*Value by your program.
2. **Who would you like to evaluate?:** Indicate the subject of the evaluation. If a photo has been uploaded for that individual's user profile, the picture will display to the right of the filter.
3. **Course:** Courses linked to the evaluation type selected in Step 1 will appear here. Select the Course that this evaluation is based on.

4. **Site:** If your program has elected to track sites, select the site that this Course is based on. The select box will default to the sites associated with the Course selected in Step 3. You may click the refresh icon to populate the select box with all sites associated with your program.
5. **Time Frame:** Select the time period that this evaluation will apply to. You may click the **Sort By Name** button to re-sort the list of Time Frames by date.
6. Click the **Next** button to create your evaluation. Complete the evaluation and click the **Submit** button. You will receive a notice that the evaluation was completed successfully:

About Trainees Report

About

Use this report to review evaluations that have been completed *about trainees*. You may also use this report to quickly search for evaluations that contain Low Scores.

Who has access to Evaluations?

Access to this report, as well as the level of access to the data available in this report, will depend on an individual's assigned Role(s). *Trainee* Roles can view data for evaluations completed about them only.

- *Administrator* Roles can view evaluation data for all trainees in their program.
- *Parent Administrator* Roles can view evaluation data for all trainees in their programs.
- *Directors* configured with the Directors rank can view evaluation data for their directorships (i.e. Program Directors can view all trainee(s) in their program(s); Course Directors and Course Group Directors can view evaluations about trainees for evaluations linked to the Course or courses he or she directs, etc.).
- *Educator* Roles do not have access to trainee evaluations.

Generating the Report

See the filter descriptions below for help on building your report.

Note: The report will only look for users who are assigned a Trainee Role at the time the report is generated. If a former trainee moves on to a faculty position, but you would like to access previous evaluations, you will need to assign the user a trainee Role in order to access the data.

1

Filter
Template: {Select a Template} ▼

Start Date: 05/01/2011 End Date: 08/01/2011

Date Type: Request Date ▼

Program Groups: {All Programs} GME School of Medicine

Program: {All Programs} Emergency Medicine Family Medicine Internal Medicine Program

2

Site Group: {All Site Groups} ▼

Site Filter: {Active Sites} ▼ Filter

Site: {All Sites} ▼

Activity Group: {All Activity Groups} ▼

Activity Filter: {All Activities} ▼ Filter

Activity: {All Activities} {All Types} Clinical Instructor of Student Performance - Final Term Concern about a Trainee Physical Medicine and Rehabilitation

3

Evaluation Type: {All Types} Clinical Instructor of Student Performance - Final Term Concern about a Trainee Physical Medicine and Rehabilitation

4

People Groups: {All Groups} ▼

Current Rank: {All Ranks} ▼

Last Name Filter: {Active Users} ▼ Filter/Refresh

Trainees: {All Users} ▼

5

Evaluations: {All Evaluations} ▼

Include Confidential Questions: No ▼

Weighted Scores: Don't Show Scores ▼ ☒ Evaluation Date Weights ☐ Active Group Weights ?

Format Option: HTML ▼

6

Save Template Next -->

Step 1: What is the scope of the report?

- **Start and End Date:** Enter the date range for the evaluations to be included in the report. You must define what evaluation event this date range refers to using the **Date Type** filter below it.
- **Date Type:** Does the date range selected above refer to the date evaluations generated (Request Date), the date the evaluations were submitted (Completed Date), the date the

Course linked to the evaluation(s) started (Time Frame Start Date) or the date the Course linked to the evaluation(s) ended (Time Frame End Date)?

Step 2: Should the report results be limited to trainee evaluations for specific Sites or Courses?

- **Site:** You may filter the report by Site to limit results to evaluations completed about a trainee at a particular site on his/her schedule. You may also filter this list by Site Group.
- **Course:** You may filter for evaluations completed about a trainee for a particular Course, or for the courses included in a Course Group.

Step 3: Should results be limited to specific Evaluation Types?

- **Evaluation Type:** You may filter by Evaluation Type(s) using this multi-select list. All Evaluations Types that are about a trainee will be available from this list.

Step 4: Would you like to view performance data for a particular People Group, Rank or Trainee?

- **People Groups:** You may filter the report results by People Group.
- **Current Rank:** You may filter the trainees included in the report by current rank.
- **Trainees:** The list of users will filter based on your previous selections and your Role permissions. Trainees can run this report for themselves, but no one else. Access for other Role(s) and program setup, as described above. If no users match your filter criteria, then the list display "No Users Found."

Step 5: Should Evaluations be limited to those with Low Scores? Would you like to include Confidential Questions and/or Weighted Scores?

- **Evaluations:** Programs have the option of defining a Low Score Threshold for questions on evaluations about trainees. This threshold is set and maintained by your Client Service Consultant; the same threshold will apply to all questions on evaluations about trainees. You may use this select list to filter the evaluations included in this report to those with low scores (**Low Score Evaluations**) or only those without Low Scores (**Passing Evaluations**).

	Entered By	Weight Group	Average	Weighted Average	Percent	Weighted Percent
	Hubert Humphrey	Requirements	3.50	3.63	70.0%	72.5%
	Joseph Lister	Requirements	4.50	4.63	90.0%	92.5%
	Florence Nightengale	Requirements	5.00	5.00	100.0%	100.0%
ig	John Pemberton	Requirements	4.50	4.38	90.0%	87.5%
	Jonas Salk	Requirements	4.50	4.63	90.0%	92.5%
Group Average:			4.40	4.45	88.0%	89.0%

- **Weighted Scores:** Question Weighting can be added to evaluation forms. You may choose to display the average, weighted average, percent and weighted percent data for these questions on the report. The report data can be grouped by trainee or weighting group. Additionally, weighting groups may be activated and inactivated, and may be set to expire on a specific date:
 - To base the weights included on the report to those that were active when the evaluation was completed, leave the radio button at the default, **Evaluation Date Weights**.
 - To base the weights included on the report to those that are active on the date that the report is generated, select **Active Group Weights**.

Step 6: What format should be used for the report?

- **Format Option:** You can generate the report in Excel or HTML format.

Click the **Next** button to generate the report.

Examples

An example is shown below. Please note, only Roles with an Anonymity Level of 3 or 4 can see the Evaluator, Course, Site, Time Frame, and Time Period information. Additionally, only Levels 2 and 4 will have a link for reviewing the full evaluation.

Print This Page

Back

E*Value Demonstration
College of Medicine

Trainee Evaluation Summary

Time Period: 07/01/2011 to 08/01/2011
Time Period Type: Request Date
Report Date: 08/01/2011

Link	Subject	Evaluation Type	Evaluator	Activity	Site	Time Frame	Time Period	Completion Date	Viewed By Trainee	Entered By
View Evaluation	Blackwell, Elizabeth - PGY2	Clinical Instructor of Student Performance - Final Term	Virginia Apgar - Educator Rank 1	Ambulatory Care	AI Medical	July	07/01/2011 - 07/31/2011	07/13/2011	07/26/2011	Virginia Apgar
	Blackwell, Elizabeth - PGY2	Clinical Instructor of Student Performance - Final Term	Mary Stuart Fisher - Preceptor	Emergency Medicine	RC Hospital	2011 July - Week 1	07/01/2011 - 07/08/2011	Open		
	Blackwell, Elizabeth - PGY2	Clinical Instructor of Student Performance - Final Term	Edward Jenner - Preceptor	Emergency Medicine	RC Hospital	2011 July - Week 1	07/01/2011 - 07/08/2011	Open		
Link	Subject	Evaluation Type	Evaluator	Activity	Site	Time Frame	Time Period	Completion Date	Viewed By Trainee	Entered By
View Evaluation	Cushing, Harvey - PGY2	Clinical Instructor of Student Performance - Final Term	Virginia Apgar - Educator Rank 1	Anesthesiology	Ross Hall	2011 July - Week 2	07/11/2011 - 07/15/2011	07/14/2011	07/21/2011	Virginia Apgar
View Evaluation	Cushing, Harvey - PGY2	Clinical Instructor of Student Performance - Final Term	Edward Jenner - Preceptor	Clinical Skills	University Clinic	July	07/01/2011 - 07/31/2011	07/21/2011	07/26/2011	Edward Jenner
View Evaluation	Cushing, Harvey - PGY2	Clinical Instructor of Student Performance - Final Term	Susan LaFlesche Picotte - Preceptor	Immunology	University Clinic	July	07/01/2011 - 07/31/2011	07/21/2011		Susan LaFlesche Picotte

Roles with an Anonymity Level of 1 or 2 will have evaluator details suppressed:

<div>Print This Page</div> <div>Back</div>										
E*Value Demonstration College of Medicine										
Trainee Evaluation Summary										
Time Period: 05/04/2011 to 08/04/2011 Time Period Type: Request Date Report Date: 08/04/2011										
Link	Subject	Evaluation Type	Evaluator	Activity	Site	Time Frame	Time Period	Completion Date	Trainee Signoff	Entered By
View Evaluation	Blackwell, Elizabeth - PGY2	Clinical Instructor of Student Performance - Final Term	Suppressed	Suppressed	Suppressed	Suppressed	Suppressed	07/13/2011	Viewed On 07/26/2011	Suppressed
Link	Subject	Evaluation Type	Evaluator	Activity	Site	Time Frame	Time Period	Completion Date	Trainee Signoff	Entered By
View Evaluation	Cushing, Harvey - PGY2	Clinical Instructor of Student Performance - Final Term	Suppressed	Suppressed	Suppressed	Suppressed	Suppressed	07/14/2011	Not signed off	Suppressed
	Cushing, Harvey - PGY2	Clinical Instructor of Student Performance - Final Term	Suppressed	Suppressed	Suppressed	Suppressed	Suppressed	Open	Not signed off	
View Evaluation	Cushing, Harvey - PGY2	Clinical Instructor of Student Performance - Final Term	Suppressed	Suppressed	Suppressed	Suppressed	Suppressed	07/21/2011	Not signed off	Suppressed
View Evaluation	Cushing, Harvey - PGY2	Clinical Instructor of Student Performance - Final Term	Suppressed	Suppressed	Suppressed	Suppressed	Suppressed	07/21/2011	Not signed off	Suppressed

Printing Completed Evaluations

Roles with an Access Level of 2 or 4 in Anonymity Setup will be able to print completed evaluations for a single trainee or for a group of trainees at once.

- The evaluations will print to a PDF document.
- Up to 50 evaluations can be selected at once.
- Evaluations that were printed previously are stamped with the date they were last printed. You may still re-print these evaluations.

Advanced Informatics E*Value Demonstration

Trainee Evaluation Summary

Activity Group: E*Value Demo Evaluation Group
Time Period: 01/01/2011 to 08/22/2011
Time Period Type: Completed Date
Report Date: 08/22/2011

[Print All Selected on Page](#)

☐ Select All Completed Evaluations on Page

You can print all completed evaluations on the page to PDF at once using the **Select All** check box.

Alternatively, you can select all of the evaluations for a particular trainee, or select individual evaluations to be printed.

Print	Link	Subject	Evaluation Type	Evaluator	Activity	Site	Time Frame	Time Period	Completion Date	Viewed By Trainee	Entered By
<input checked="" type="checkbox"/>	View Evaluation	Blackwell, Elizabeth - PGY2	Clinical Instructor of Student Performance - Final Term	Mary Stuart Fisher - Preceptor	E*Value Demo - Clinical Skills	University Clinic	Spring 2011	03/01/2011 - 05/31/2011	03/29/2011		Mary Stuart Fisher
<input type="checkbox"/>	View Evaluation	Blackwell, Elizabeth - PGY2	Clinical Instructor of Student Performance - Final Term	Mary Stuart Fisher - Preceptor	E*Value Demo - Emergency Medicine	RC Hospital	Eval 2 Q1	02/08/2011 - 02/14/2011	02/17/2011		Mary Stuart Fisher
<input type="checkbox"/>	View Evaluation	Blackwell, Elizabeth - PGY2	Clinical Instructor of Student Performance - Final Term	Susan LaFlesche Picotte - Preceptor	E*Value Demo - Practical Skills	MG University	Eval 2 Q1	02/08/2011 - 02/14/2011	02/17/2011		Susan LaFlesche Picotte
<input checked="" type="checkbox"/>	View Evaluation	Cushing, Harvey - PGY2	Clinical Instructor of Student Performance - Final Term	Mary Stuart Fisher - Preceptor	E*Value Demo - Clinical Skills	University Clinic	Spring 2011	03/01/2011 - 05/31/2011	03/29/2011		Mary Stuart Fisher
<input checked="" type="checkbox"/>	View Evaluation	Cushing, Harvey - PGY2	Clinical Instructor of Student Performance - Final Term	Mary Stuart Fisher - Preceptor	E*Value Demo - Emergency Medicine	RC Hospital	Eval 2 Q1	02/08/2011 - 02/14/2011	02/17/2011		Mary Stuart Fisher
<input checked="" type="checkbox"/>	View Evaluation	Cushing, Harvey - PGY2	Clinical Instructor of Student Performance - Final Term	Susan LaFlesche Picotte - Preceptor	E*Value Demo - Practical Skills	MG University	Eval 2 Q1	02/08/2011 - 02/14/2011	02/17/2011		Susan LaFlesche Picotte
<input type="checkbox"/>	View Evaluation	Humphrey, Hubert - PGY1	Clinical Instructor of Student Performance - Final Term	Mary Stuart Fisher - Preceptor	E*Value Demo - Practical Skills	Franklin CVS Pharmacy	May 2011	05/01/2011 - 05/31/2011	05/23/2011		Louis Pasteur
<input type="checkbox"/>	View Evaluation	Humphrey, Hubert - PGY1	Clinical Instructor of Student Performance - Final Term	Mary Stuart Fisher - Preceptor	E*Value Demo - Clinical Skills	University Clinic	Spring 2011	03/01/2011 - 05/31/2011	03/29/2011		Mary Stuart Fisher
<input type="checkbox"/>	View Evaluation	Humphrey, Hubert - PGY1	Clinical Instructor of Student Performance - Final Term	Mary Stuart Fisher - Preceptor	E*Value Demo - Emergency Medicine	RC Hospital	Eval 3 Q1	02/15/2011 - 02/21/2011	07/13/2011		Mary Stuart Fisher
<input type="checkbox"/>	View Evaluation	Humphrey, Hubert - PGY1	Clinical Instructor of Student Performance - Final Term	Mary Stuart Fisher - Preceptor	E*Value Demo - Emergency Medicine	RC Hospital	Eval 2 Q1	02/08/2011 - 02/14/2011	02/17/2011		Mary Stuart Fisher
<input type="checkbox"/>	View Evaluation	Humphrey, Hubert - PGY1	Clinical Instructor of Student Performance - Final Term	Susan LaFlesche Picotte - Preceptor	E*Value Demo - Practical Skills	MG University	Eval 2 Q1	02/08/2011 - 02/14/2011	02/17/2011		Susan LaFlesche Picotte

The check box that appears below the **Print** button can be used to select all completed evaluations for a trainee at once.

If you previously printed an evaluation to PDF, the date it was last printed will display.

- To print all of the evaluations at once, check the **Select All Completed Evaluations on Page** box, then click the **Print All Selected on Page** button.
- To print all of the evaluations for a particular trainee, click the check box directly below the **Print** button in the table or evaluations for that trainee, then click the **Print** button.
- To print select evaluations, click the check boxes for the applicable evaluations, then click the **Print All Selected on Page** button.

Reviewing Trainee Signoff

Programs have the option to require Trainees to "Signoff" on specific Evaluation Types completed about them. You can contact your Client Service Consultant at anytime to implement this functionality.

When an evaluation is completed that requires trainee signoff, the trainee is sent an email notification. The trainee can use this report to open and review these evaluations. A signoff section will display at the top of the evaluation:

Print This Page
Email as PDF
?
Close Window

E*Value Demonstration
College of Medicine

Trainee Evaluation

This is an example of an evaluation that requires Trainee Signoff.

Trainees can use the **Reports | Evaluations | About Trainees** menu item to record signoff. Trainees will only be able review evaluations completed about themselves.

Evaluator:	Suppressed	Subject:	Florence Nightengale - PGY1
Activity:	Suppressed	Site:	Suppressed
Evaluation Type:	Clinical Instructor of Student Performance - Final Term	Completion Date:	07/21/2011
Request Date:	Suppressed	Dates of Activity:	Suppressed
Period:	Suppressed		
Subject Participation Dates:	Suppressed		

Please select the option that best matches your level of agreement with this evaluation.

☐ Agree
☐ Disagree

If you disagree, please explain your reasons below.

Comments entered above may be viewed by your program director or advisor and may be a part of a printed report.

Submit

Patient Care (Question 1 of 9 - Mandatory)

Patient Care: Logically pursues symptomatology during history taking

N/A	Unsatisfactory	Marginal	Satisfactory	Very Good	Superior
0	1	2	3	4	>> 5 <<

When Administrators, Directors and Advisors run the report, they will be able to see whether or not the trainee has signed off on the evaluation. Instead of a Viewed on date, the report will display the Signoff date:

Link	Subject	Evaluation Type	Evaluator	Activity	Site	Time Frame	Time Period	Completion Date	Trainee Signoff	Entered By
	Nightengale, Florence - PGY1	Clinical Instructor of Student Performance - Final Term	Virginia Apgar - Educator Rank	Ambulatory Care	Al Medical	2011 July - Week 2	07/11/2011 - 07/15/2011	Open	Not signed off	
View Evaluation	Nightengale, Florence - PGY1	Clinical Instructor of Student Performance - Final Term	Edward Jenner - Preceptor	Clinical Skills	University Clinic	July	07/01/2011 - 07/31/2011	07/21/2011	Agreed 08/01/2011	Edward Jenner

Tip: Programs have the option to automatically notify users assigned the Program Director Role via email when trainees disagree with an evaluations completed about them. Notifications can be turned on and off by contacting your Client Service Consultant.

Add/Edit Schedules

About

In its most basic use, the **Add/Edit Schedules** tool is a method of scheduling that allows you to indicate the **Users** that should be assigned to an **Course** during a particular **Time Frame**. This method allows you to generate evaluations based on the rank of the users scheduled and the evaluation types linked to the scheduled Course. Beyond basic scheduling, this tool may also be used to schedule sites, teams, shifts and across programs. These advanced scheduling types may require configuration of your program setup by your Client Service Consultant. See below for more information.

Filter Schedules

Begin by filtering the scheduling screen by Users, [Time Frames](#), [Courses](#), and if applicable, Sites. You may also filter for a specific date range.

The screenshot shows the 'Add/Edit Schedules' tool interface. It includes several filter sections with callouts explaining their functions:

- Filter for users to be scheduled by Roles, Ranks or last name.** (Points to Roles, Ranks, and Users dropdowns)
- Filter for activities to be scheduled by type, or group.** (Points to Activity Types and Activity Groups dropdowns)
- You may filter by specific Start & End Dates.** (Points to Start & End Date date pickers)
- Filter for Time Frames by group and sort as needed.** (Points to Time Frame Groups and Sort Time Frame dropdowns)
- Sites to show is an optional filter.** (Points to Sites to show dropdown)
- To schedule by Activity, select the Activity Schedule View. To schedule by user, select Users.** (Points to Activity and Users radio buttons)
- You may include inactive users by selecting this box.** (Points to Include Inactive Users checkbox)
- To only view existing schedule entries, select the Condensed box.** (Points to Condensed checkbox)

The interface also includes a 'View Schedule' button and a 'Show All' link.

Note: Certain terms that appear on this screen can be translated for your program and therefore may not match the image above..

You can click the **View Schedule** button with or without filtering to view your evaluation schedule.

Clicking on this icon will generate a report that allows you to see ALL evaluations that will or have been generated for the block.

01/22/12 11/21/2011 to 01/22/2012	01/22/12 12/19/2011 to 01/22/2012	Vacation 12/24/2011 to 01/02/2012	01/09/12 - 02/19/12 01/09/2012 to 02/19/2012	01/23/12 - 02/19/12 01/23/2012 to 02/19/2012	01/23/12 - 03/18/12 01/23/2012 to 03/18/2012	02/20/12 - 03/18/12 02/20/2012 to 03/18/2012	02/20/12 - 04/08/12 02/20/2012 to 04/08/2012	Spring Vacation 03/19/2012 to 03/25/2012	03/26/12 - 04/15/12 03/26/2012 to 04/15/2012	03/26/12 - 05/13/12 03/26/2012 to 05/13/2012
			Boston School of Med Balboni - Test, Rocco Jan 09-Feb 19 Vaughan, Chris Jan 09-Feb 19			Boston School of Med Balboni - Test, Rocco Feb 20-Mar 18				

After clicking the “Show Evaluation/Coursework” icon the following screen will appear showing all of the evaluation that were generated for the block as well as any errors that may of occurred during the generation process. Although it only alerts you that there was an error most commonly it is because a student and a preceptor are not scheduled to the same team.

Aged Evaluations

About

The **Aged Evaluations** tool allows you to search for old and/or incomplete evaluations, coursework or exams for the purpose of deleting them. They can be deleted en masse using this tool. You can search for the items to be deleted by user, date, Time Frame, Course, evaluation type and/or status.

Filter for the aged evaluations, coursework or exams using any of the available filters, as described below:

Select evals by:

Filter Users: Search

Evaluating User: **1** -All Users-

2 Find evaluations associated with time frames between:

Start Date: Mar. 03 2009

End Date: Mar. 02 2010

3 Time Frame: All Timeframes

Activities: All Activities

Evaluation Type: All Evaluation Types

Evaluation Status: All evaluations not completed **4**

5 Automatically select all results for deletion? Yes: ☐ No: ☒

6 Search

Note: Certain terms that appear on this screen can be translated for your program and therefore may not match the image above.

- Evaluating User:** You may search for evaluations, coursework or exams by the user it is assigned to, or leave at the default **All Users**. To filter the list for specific user, enter all or part of his/her last name in the text box and click the **Search** button.
- Start and End Date:** You may search for evaluations, coursework or exams associated with specific Time Frames by indicating a start and end date.
- Time Frame, Courses, Evaluation Type:** Alternatively, you may search for items that generated during a specific Time Frame, items associated with a specific Course or by all courses, or items with a specific evaluation type.
- Evaluation Status:** Indicate the status of the items you would like to review/delete.
- Automatically select all results for deletion?:** Click yes to automatically mark all results returned for deletion. You will be able to un-select any of the results, if necessary.
- Select the **Search** button to see a table containing all of the evaluations that meet your criteria.

1 Delete Selected Evaluations

Activity Name	Time Frame	Request Date
Clinical Skills	Eval 3 Q1	02/21/2011

Remove	Evaluator Name	Evaluator Rank	Evaluation Subject	Evaluation Type	Evaluation Status
<input checked="" type="checkbox"/>	Jeremiah Johnson	Preceptor	Cambell, Noah	Clinical Instructor of Student Performance	Open
<input checked="" type="checkbox"/>	Jeremiah Johnson	Preceptor	Jail, Tariq	Clinical Instructor of Student Performance	Open
<input checked="" type="checkbox"/>	Jeremiah Johnson	Preceptor	Carter, Niko	Clinical Instructor of Student Performance	Open
<input checked="" type="checkbox"/>	Jeremiah Johnson	Preceptor	Tomlinson, Michelle	Clinical Instructor of Student Performance	Open

Activity Name	Time Frame	Request Date
Emergency Medicine	Eval 3 Q1	02/21/2011

Remove	Evaluator Name	Evaluator Rank	Evaluation Subject	Evaluation Type	Evaluation Status
<input checked="" type="checkbox"/>	Kim Montgomery	Preceptor	Montgomery, Wayne	Clinical Instructor of Student Performance	Open
<input checked="" type="checkbox"/>	Kim Montgomery	Preceptor	Mali, Ashok	Clinical Instructor of Student Performance	Open
<input checked="" type="checkbox"/>	Kim Montgomery	Preceptor	Wright, Robert	Clinical Instructor of Student Performance	Open
<input checked="" type="checkbox"/>	Kim Montgomery	Preceptor	Booth, Lili Mae	Clinical Instructor of Student Performance	Open

3 Delete Selected Evaluations

Note: Certain terms that appear on this screen can be translated for your program and therefore may not match the image above.

1. Search results will be grouped by **Course**, **Time Frame** and **Request Date**.
2. Indicate those items that should be deleted with a check box in the **Remove** column. Items may already be checked if you indicated that results should be automatically selected.
3. Click either of the **Delete Selected Evaluations** buttons to remove the aged items. You will be prompted to confirm the deletions; select **OK** to continue. A dialogue box will notify you that the items were deleted.