Registrar's Office

E-Value Reference Guide

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

Bio Data

 ->Profiles ->Biodata

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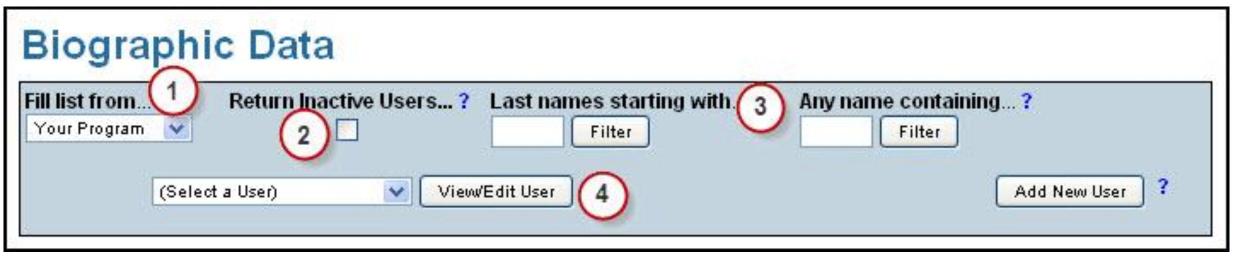
Individual user profiles are found within the **Users** section under the **Bio Data** sub-menu. From this menu, you can add a new user or modify an existing user's information using the tabs available. The tabs that are available to you will depend upon the E*Value functionality that your program has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

Biographic Data

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



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

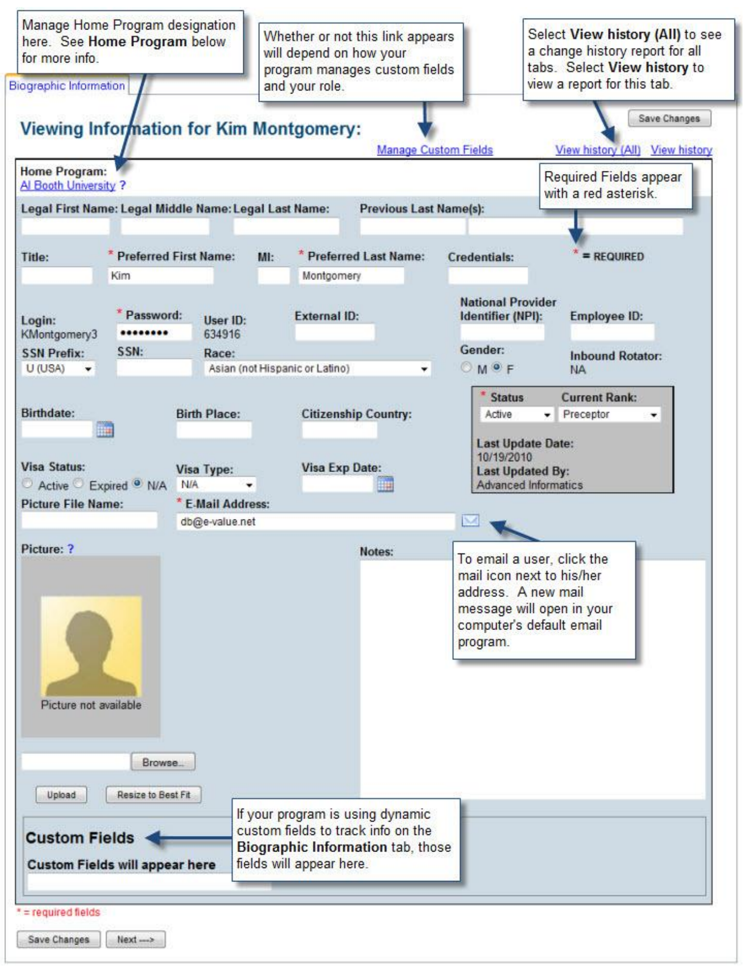
institution that meet your filter criteria. Alternatively, you can filter this list using a name other than last name using the **Any name containing** field.

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.

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.



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.

Additionally, if your program is using **E*gme** (our financial reimbursement tool) in connection with E*value, there are additional fields that must be populated; these fields are indicated with a **heavy black border** around the field name 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)

Field	Field Description
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.

Promote

-> Promote

All users in E*Value must be assigned a Rank. For your trainees, this Rank typically corresponds to the training year designation used by your school or institution. At the end of each academic year, programs should advance these trainees to their next training Rank. Although an individual's Rank can be updated from their **Biographic Data** profile, the **Promote** tool can be used to promote trainees en masse, per a pattern and schedule that you define. Keeping trainee Ranks current in E*Value will ensure that:

- Correct evaluation types generate for the trainees schedule activities
- Reports can be filtered and organized by training year

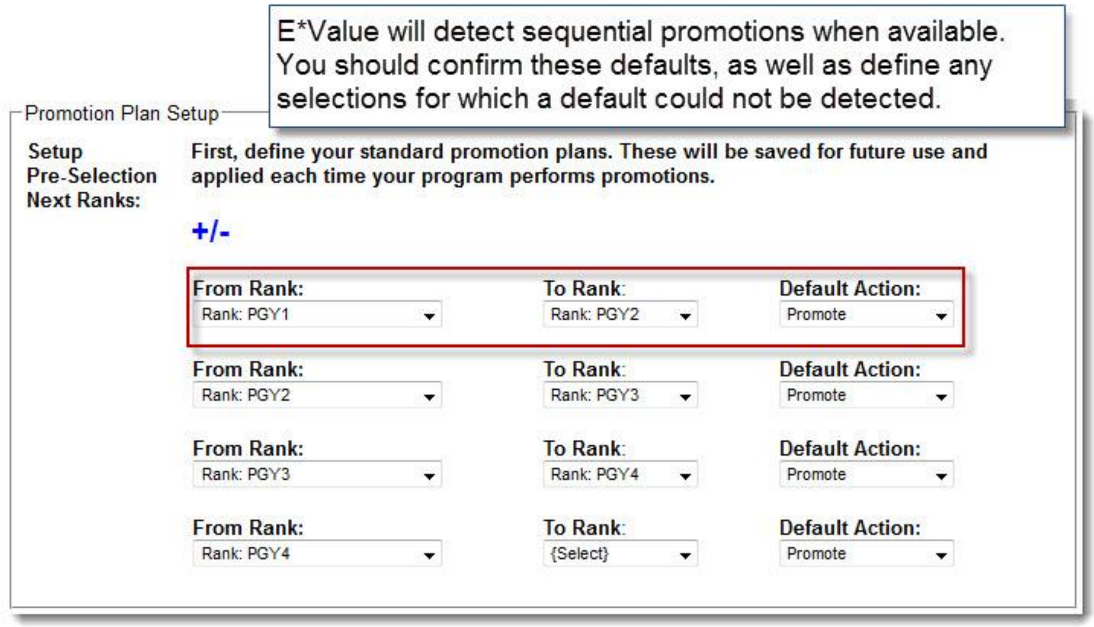
Defining a Promotion Pattern

Most programs follow a predictable pattern for advancing trainees (e.g. Post-graduate Year 1 to Post-graduate Year 2). E*Value will suggest a promotion pattern based on the Ranks linked to your program, but you should also verify this information. Your program may deviate from the suggested pattern.

Tip: Any changes you make to the pattern will be saved for future use. If you are not defining or adjusting your program's promotion pattern, you may skip ahead to the Scheduling Promotions section below.

Ranks Only (standard)

The instructions below describe the promotion process for all non-Pharmacy programs. Schools of Pharmacy have a special configuration, which is explained in the Ranks and Roles section below.



Each row represents the promotion plan for a particular Rank. You should confirm or define the **From Rank**, **To Rank** and **Default Action** for each.

- **From Rank:** Each trainee Rank linked into your program will display. To ensure every rank has a defined promotion plan, these selections cannot be modified.
- **To Rank:** Indicate the Rank that individuals currently assigned the **From Rank** listed should advance to during their next promotion. E*Value will detect sequential ranks and suggest a pattern (e.g. a Year 1 to a Year 2). However, pre-active or graduating ranks often will not have a default selection; take special care to indicate how you would like these Ranks updated during promotions.
- **Default Action:** Although this tool is most commonly used to promote Ranks, you have several additional options upon promote:
  - Promote - Individuals assigned the **From Rank** will be promoted to the selected **To Rank** when this action is chosen.
  - Don't Promote - Alternatively, you can indicate that a Rank should not be promoted.
  - In-Activate - You can also indicate that a particular Rank should be inactivated upon promote. This may be useful for inactivating a graduating class.
  - Set to Post-Active - Post-Active is a special status that your program may or may not use. It is usually used to allow graduated users access to the system for particular components (e.g. MyFolio, report data, etc.). Contact your Client Service Consultant if you have questions about the use of this option.

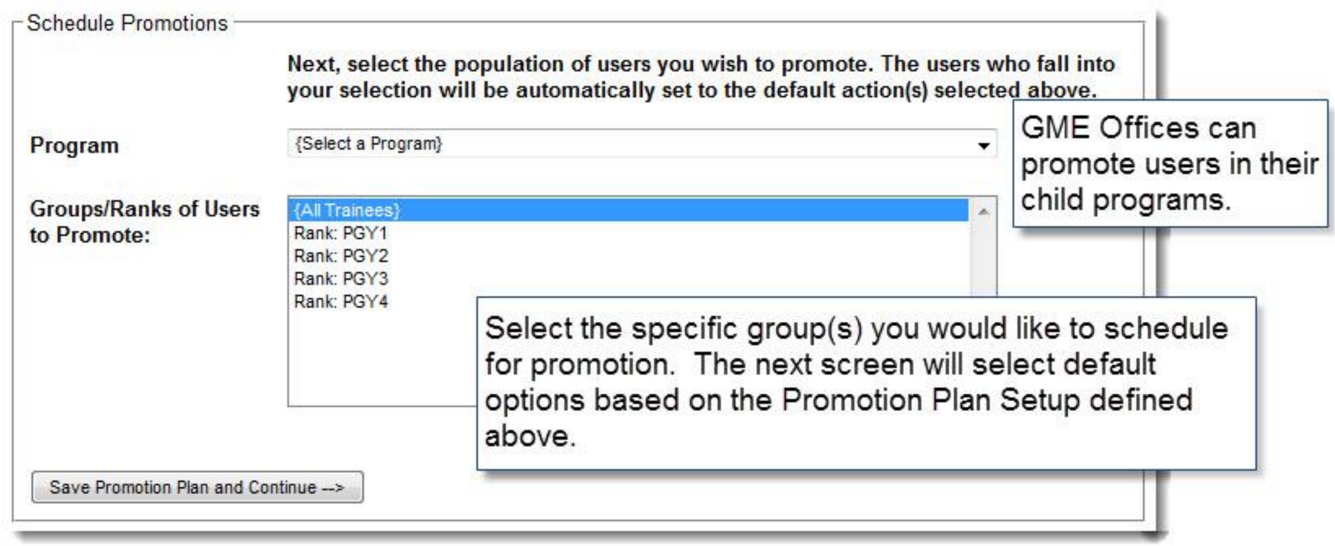
Scheduling Promotions

Select the specific Rank of Group of users for whom you would like to schedule promotion.

Caution: If you promote trainee using their rank classification, the order in which you update each rank is very important. If you are using this method, we highly recommend promoting each rank in reverse chronological order.

For example, PGY2s should be promoted before PGY1s are promoted. If you promote the PGY1 users first, your new PGY2 list will contain both the current PGY2s and the PGY1 users just promoted to PGY2s.

Tip: To help avoid confusion when promoting users, we suggest you create People Groups labeled by academic year (e.g. Class of 2009, Intern Class of 2010), then promote user via those groups. When creating the People Group, be sure to indicate 'Yes' for the "Make available on Promotions Screen" option.



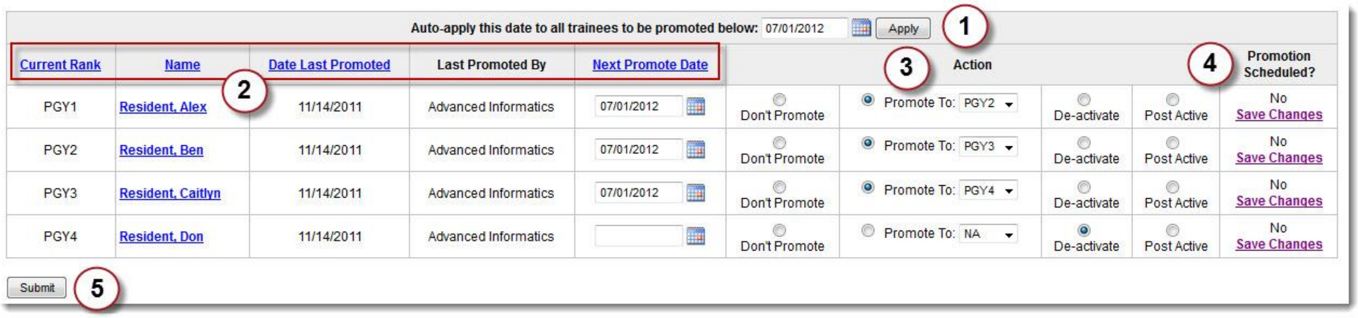
- **Program:** GME Offices must select the child program for which they want to promote users. This field will not display for other program types.
- **Groups/Ranks of Users to Promote:** Select the group(s) that you want to promote from the multi-select list. All trainees Ranks will be available for selection, as well as People Groups flagged with the "Make available on Promotions Screen" option.

Promote Across Programs

Please note that you will be able to promote any user linked to your program. Users may be linked to multiple programs, and certain parent-level programs can promote users across all of the programs they are linked to at once. You should use discretion when choosing this option.

In **School of Medicine** programs, trainees typically have the same rank in all clerkships. In this case, it may be advisable to promote across programs.

Click **Save Promotion Plan and Continue** to schedule your promotion date(s).



Step 1: What is the standard start date for the next academic year? You may assign this as the next promotion date en masse using the top row.

- **Auto-apply:** You may assign a promote date to all of the users shown using this date picker and the **Apply** button. You may define any exceptions to this date in the list of users shown below.

Step 2: Review the users and promotion date details.

- **Current Rank:** The column will display the trainee's current rank. You can sort on this field by selecting the header link. Any changes not saved will be lost during the re-sort.
- **Name:** The column will display the trainee's name. You can sort on this field by selecting the header link. Any changes not saved will be lost during the re-sort.

- **Date Last Promoted and Last Promoted By:** The table will display the last date that the trainee was promoted and the name of the person who did the promotion. The Date of Last Promotion is a sortable field. Note that these fields will only show promotions within your program, not promotions to another rank in other programs at your institution. You will also see promotion information if your users have been promoted by users within the GME Office.
- **Next Promote Date:** This field can be modified on a person-by-person basis. This is also a sortable field.

Note: User will be promoted just after 12:00 a.m. on date entered here (based on your program's Time Zone setting).

You will be sent an email notification 5 days prior to the promotion date to notify you of the users that will be promoted. Additionally, you will receive an email notification the day after the promotion date to notify you of the users that were updated.

Step 3: Confirm or update the action to be performed on the Next Promote Date.

- **Action:** Although a default action was selected based on your promotion pattern, it can still be changed on a person by person basis. The options include:
    - Don't Promote - user will not be promoted
    - Promote To (rank) - user will be promoted to the defined training rank. Note that a 'Graduated/Active' or 'Alumni' option may be available; this status can be used for trainees who are leaving the program but who still need access to E*Value to complete or review their evaluations.
    - De-activate - user will not be promoted and their E*Value user account will become inactive
    - Post Active - user will not be promoted, but may still have access to certain menu items depending on program setup.

Step 4: Edit or save changes.

- **Promotion Scheduled?:** Once you have made your changes you can either scroll to the bottom of the screen and click **Submit** to record all promotions, or you can click Save Changes at the end of the row to save changes by user. You may also **Edit** the promotion information.

Step 5: Submit your changes.

- **Submit:** If you have not already done so, save your changes by clicking the **Submit** button. If you wish to edit an already scheduled user, you can do so by clicking Edit. You will be asked to confirm your changes, then notified when changes are saved.

Add/Edit Availability

-> Add/Edit Availability

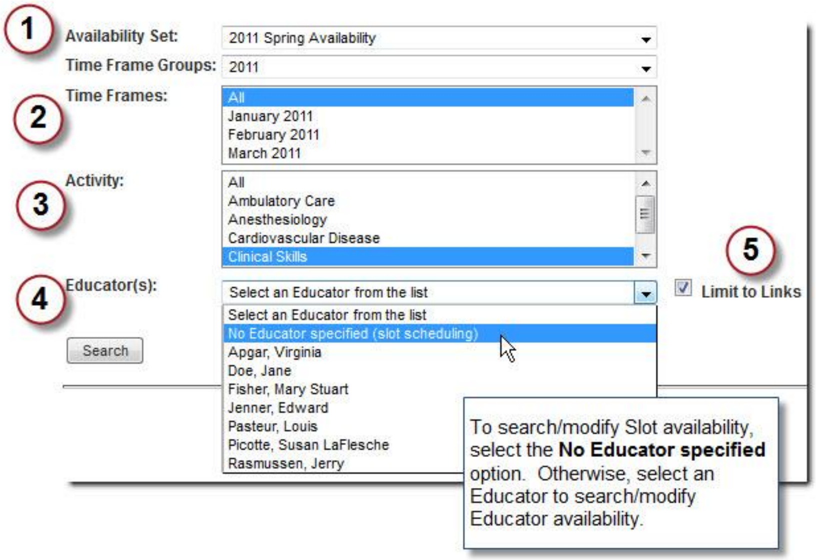
About

This tool can be used to add and modify Slot Availability for programs that either:

- Work with the E*Value staff to create optimized schedules: After you submit your curriculum information to the Optimized Scheduling Team, they will build your curriculum in E*Value and link it to what is known as an Availability Set. Once the curriculum is linked to an Availability Set, the schedule optimizer will need to know the number of trainees that can be accommodated by a particular educator, and/or at a particular site, during a given period of time, for the courses included in the curriculum. After you have added your availability information, contact the Optimized Scheduling Team to indicate that the schedule is ready to be opened for trainee preferences.
- Use the Availability Scheduling tools in E*Value: After the Curriculum has been linked to an Availability Set with the Manage Availability tool, you can manage both Educator and Slot availability with this tool.

Searching Availability

Begin by selecting the Availability Set for which you are defining educator availability. You may then filter the selected Availability Set by Time Frame and/or Courses. Finally, select the Educator for whom you are entering availability. You may limit search results to Course, sites and Educator links that have already been established by checking the **Limit to Links** box.



Step 1: Which Availability Set are you editing or modifying?

- **Availability Set:** Begin by selecting an availability set. Availability Sets are linked to curricula in order to associate the required activities with the available Slots or Educators. If you are working with the E*Value Optimized Scheduling Team, then they will typically build the Availability Set for you. Otherwise, it can be created with the Manage Availability tool. Your selection will filter the options available in Steps 2-4.

Step 2: What Time Frames would you like to manage availability for?

- **Time Frame Groups:** If a Time Frame Group falls within the date range established for the Availability Set selected in Step 1, then it will be included here as a filter option.
- **Time Frames:** The available Time Frames that appear in this list will be those that fall within the date range established for the Availability Set selected in Step 1. If you selected a Time Frame Group in Step 2, the list will be further filtered to those Time Frames included in the group.

Step 3: Which Course or Courses would you like manage availability for?

- **Course:** The available courses will be those that are included in a curriculum that is linked to the Availability Set selected in Step 1. Curricula are linked to Availability Sets by the E*Value Optimized Scheduling team.

Step 4: Would you like to manage Slot or Educator availability?

- **Educator(s):** To manage Slot availability, select the "No Educator specified (slot scheduling)" option. To manage Educator availability, select the educator for whom you would like to add or manage availability.

Step 5: Would you like to limit the availability that can be edited to existing links?

If availability has already been entered via the Manage Availability tool, then a link has already been established between the items. Alternatively, links may have been imported from EMS, or created in E*Value from the Educator Site Links, Educator Course Links, or Site Course Links tools. If links have not been created, you will have the option of creating them when entering availability.

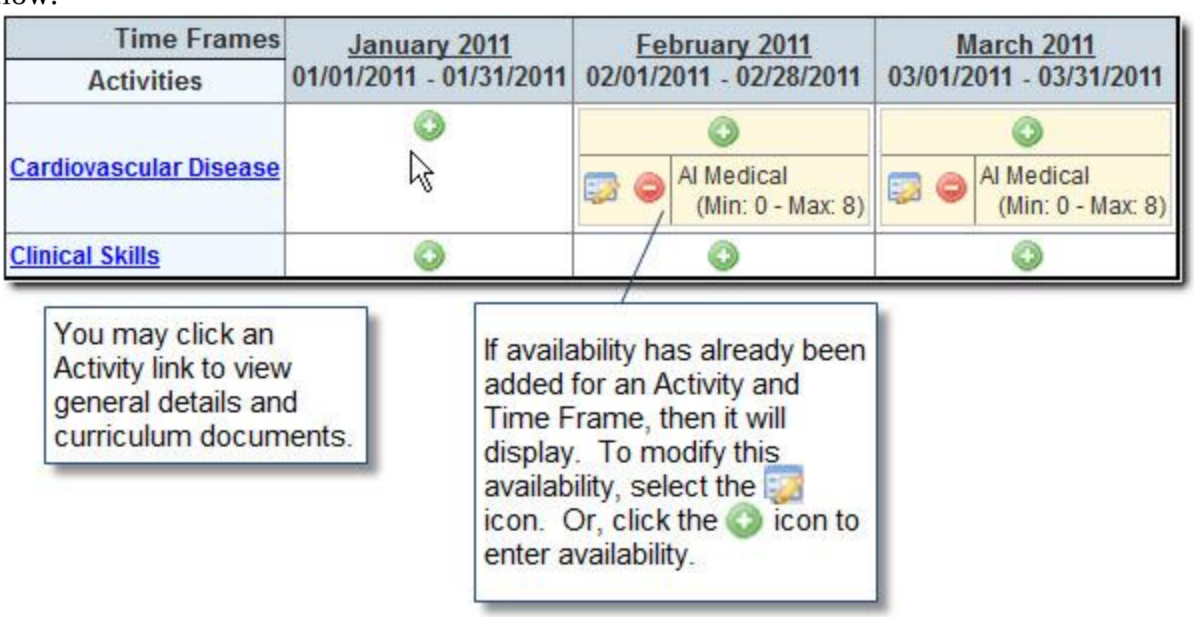
- **Limit to Links:** This check box determines whether or not search results are limited to already established Course, Educator and site links. If left checked, then you will not be able to add or modify availability unless the link exists. Uncheck this box to add availability regardless of established links.

Select the **Search** button to review or modify availability. The results will display in the **Available Courses** table in the lower portion of the screen.

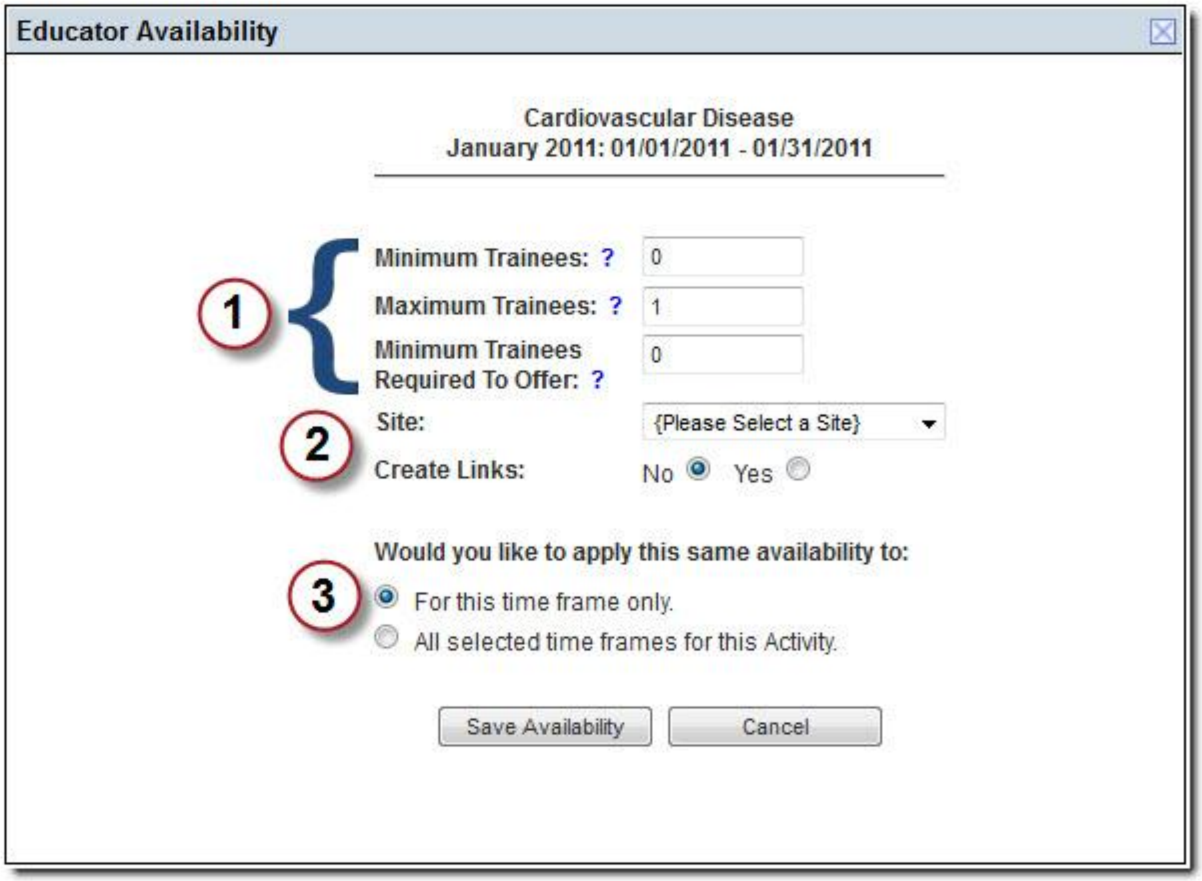
Top

Modifying Availability

Once you have filtered the Availability Set, the applicable courses and Time Frames will display in the **Available Courses** table in the lower portion of the screen. Existing availability entries will appear in the table. You may edit these entries or add new availability details, as described below.



Click the green add icon to enter availability. If you searched for a particular Educator, then the availability will be added for that individual; otherwise, it will be treated as Slot availability based on the Site selected in the dialogue box:



Step 1: How many trainees can be accommodated?

- **Minimum Trainees:** This parameter is only applicable to programs doing Schedule Optimization. Indicate the minimum number of trainees that can be allotted to this Activity/Site/Time Frame. If a minimum is specified, the optimizer will require that the offering be filled to at least that minimum.
- **Maximum Trainees:** This parameters is needed both for Schedule Optimization and Availability Scheduling. Indicate the maximum number of trainees. This value must be greater than 0.
- **Minimum Trainees Required to Offer:** This parameter is only applicable to programs doing Schedule Optimization, and it should only be used if applicable. Indicate the minimum number of trainees required to offer the activity. If a minimum to offer is used, the optimizer will not require that anyone be scheduled, but if anyone is scheduled, there must be at least the set minimum of trainees in order for the the activity to be offered.

Step 2: Which site does this availability apply to?

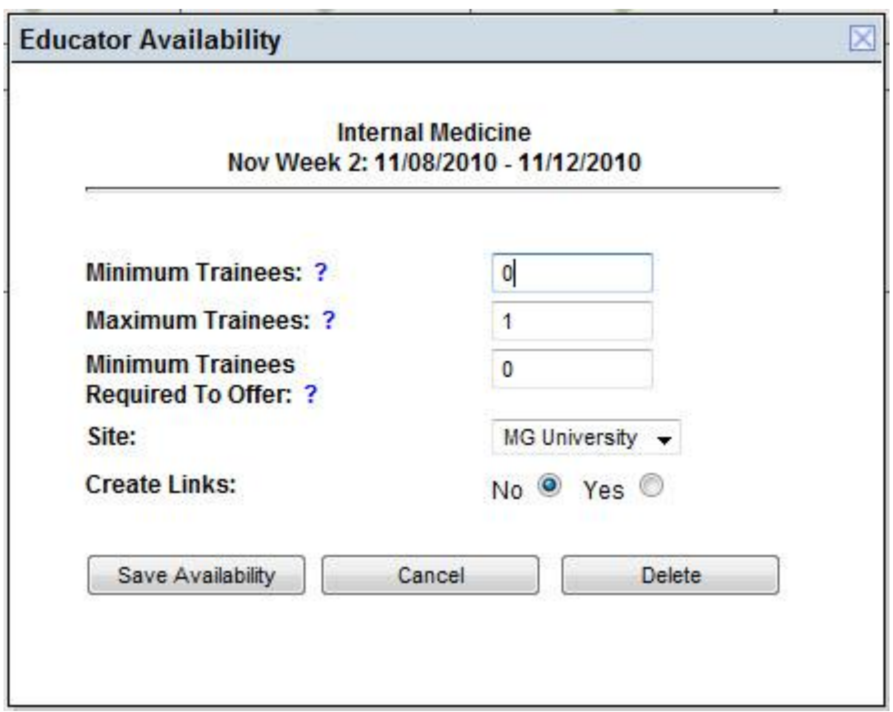
- **Site:** Select the location for the offering. Please note, if the **Limit to Links** box was left checked when searching for availability, then only Sites that are linked to the selected Activity and Educator (if defining Educator availability) will display. Otherwise, all sites will display in the select list.

Step 3: Does this availability apply to additional Time Frames?

- **Would you like to apply this same availability to:** Use the radio buttons to indicate if the availability selections should only be applied to the selected Time Frame, or if they should apply to all Time Frames for the selected Course.

Select the **Save Availability** box to record your changes and return to the **Available Courses** table. For each Time Frame that already contains an availability entry, you may either edit or remove the current availability using the edit and remove icons. When you edit an existing availability entry, you may edit any of the fields described above. Additionally, you may remove any of the **Current Availability** entries.

> **Note:** Use caution when modifying educator availability after the schedule has been opened to trainees for entering their preferences. Trainees will **not** be automatically notified of changes to availability. If they previously indicated a preference for which you remove availability entirely, that preference will be highlighted yellow in their preferences. If you add or remove availability, you may want to notify your trainees that they should review their preference selections.



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

Availability Scheduling

-> Availability Scheduling

About

The **Availability Scheduling** tool allows you to review current availability commitments and assignments for courses/Time Frames included in a curriculum or curricula. Availability Scheduling is based on the number of schedule slots that can be accommodated at a particular site or by a particular educator for a Course during a certain Time Frame. You can schedule users directly from the Availability Scheduling screen or use it in conjunction with E*Value's Schedule Optimization functionality, as well as the Add/Edit schedule tool.

Setup Considerations

Availability Scheduling & Optimized Scheduling

If you are using **Availability Scheduling** in conjunction with Optimized Scheduling there are a few points to keep in mind when pre-scheduling. Pre-scheduling can be done for trainees who have courses that are already determined, such as trainees who are off-cycle or must take a particular course for remediation purposes.

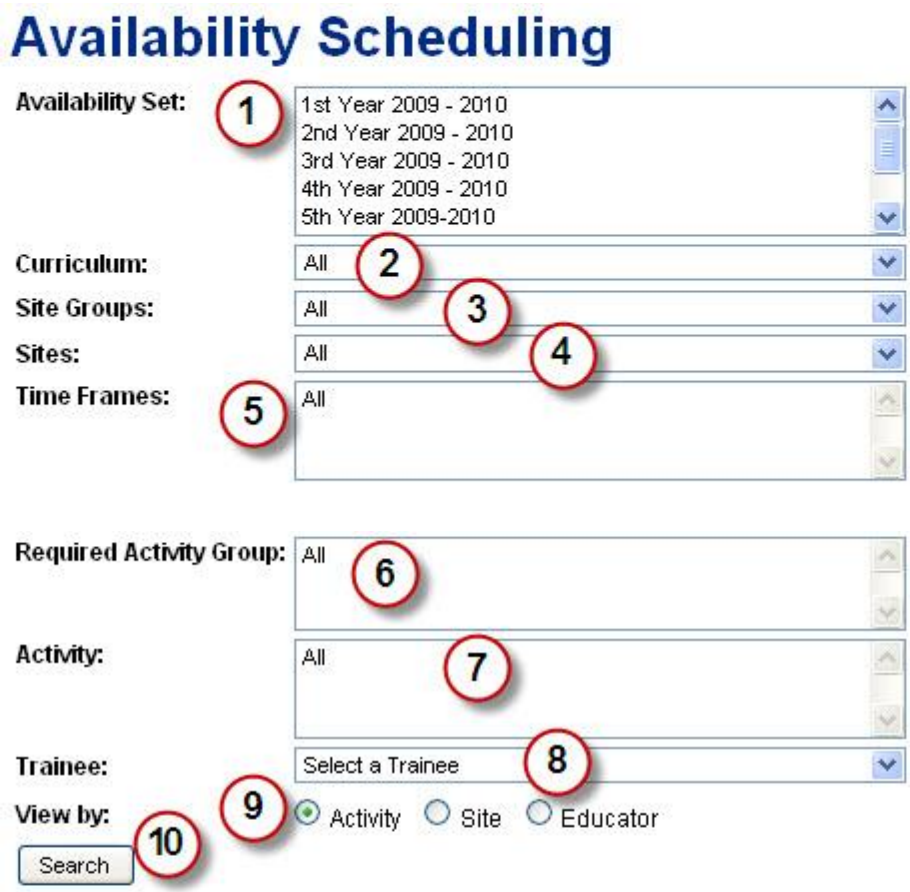
- This type of scheduling should be kept to an absolute minimum to ensure that there is enough availability for the optimization.
- Pre-scheduling should be done during the time that the schedule is open for trainee preferences.

Availability Scheduling & Default Educators

If your program uses Default Educators to automatically schedule educators when trainees are scheduled into a particular Course, or Educator Site Linking to automatically schedule Educators when trainees are scheduled at a particular Site, the default Educators and links must be in place prior to scheduling trainees.

Filtering the Availability Set

Begin by selecting the Availability Set to be reviewed. The remaining fields will refresh with the applicable information for that Availability Set.



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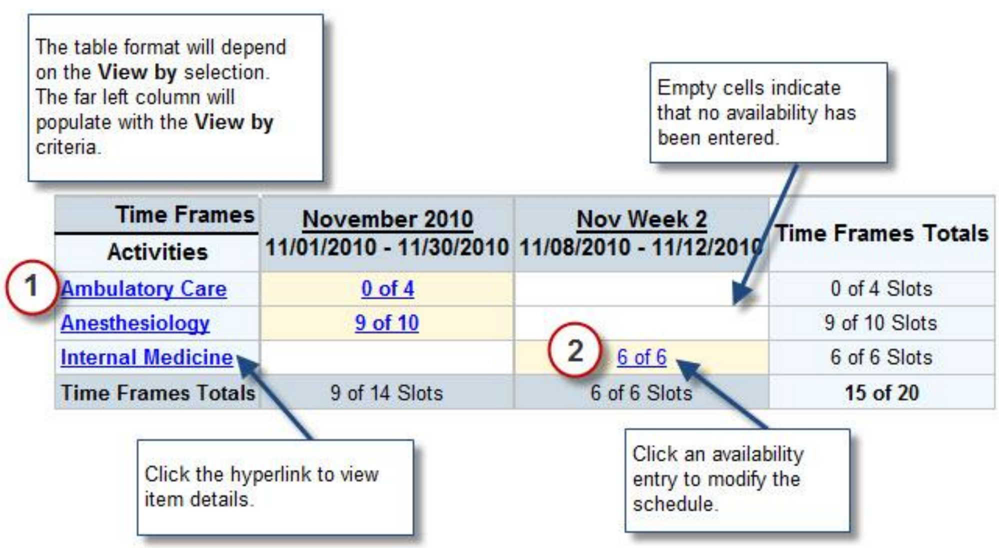
Note:*Certain terms that appear on this screen can be translated for your program and therefore may not match the image above.*

1. **Availability Set:** Select the Availability Set that you would like to review. This is a necessary selection that will refresh your screen and populate the remaining fields. You can select multiple sets using the Shift, Ctrl and Apple keys. To view all your offerings for this availability set, leave everything else at the default and click **Search**. Alternatively, you can filter down your results using the filters described below.
2. **Curriculum:** If you have more than one curricula linked to this Availability Set you can select which one to view here. An example of a scenario in which multiple curricula would be linked to a single Availability Set is when your 3rd years and your 4th years can both participate in the same course.
3. **Site Group:** If you are scheduling by sites, you can filter to view a defined group of sites. For more information, see Site Groups.

4. **Sites:** If you are scheduling by sites, you will have the option to limit the schedule results by the selected site. The list will populate with sites that have been linked to the selected Availability Set(s). Additionally, if you selected a site group in Step 3, the sites will filter based on your selection.
5. **Time Frames:** You may wish to only view a select few Time Frames. The Shift, Ctrl and Apple keys can be used to select multiple Time Frames. The list will populate with Time Frames that have been linked to the selected Availability Set(s).
6. **Required Course Group:** You may filter by Course Group. If no curriculum is selected, the list will populate with Required Course Groups linked to the Availability Set(s) selected in Step 1. If a curriculum is selected, the list will populate with groups linked to the curriculum selected in Step 2. Required Course Groups may be created with the Course Requirements tool. Those groups can be applied to curricula using the Manage Curriculum tool.
7. **Course:** You may limit the results by selecting specific courses. The list will populate with courses linked to the selected curriculum. The Shift, Ctrl and Apple keys can be used to select multiple courses.
8. **Trainee:** Selecting a Trainee will highlight the schedule of the selected person, **provided the schedule has already been optimized.** The list will populate with trainees linked to the curriculum. If you are not using Schedule Optimization, you can link trainees to the curriculum using the Apply Curriculum to Trainee tool.
9. **View by:** Indicate if you would like to view the schedule by Course, Site, or Educator.
10. Select the **Search** button to refresh your screen and display your results below the filter options.

Modifying the Schedule

The example below uses the **Course** view.



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

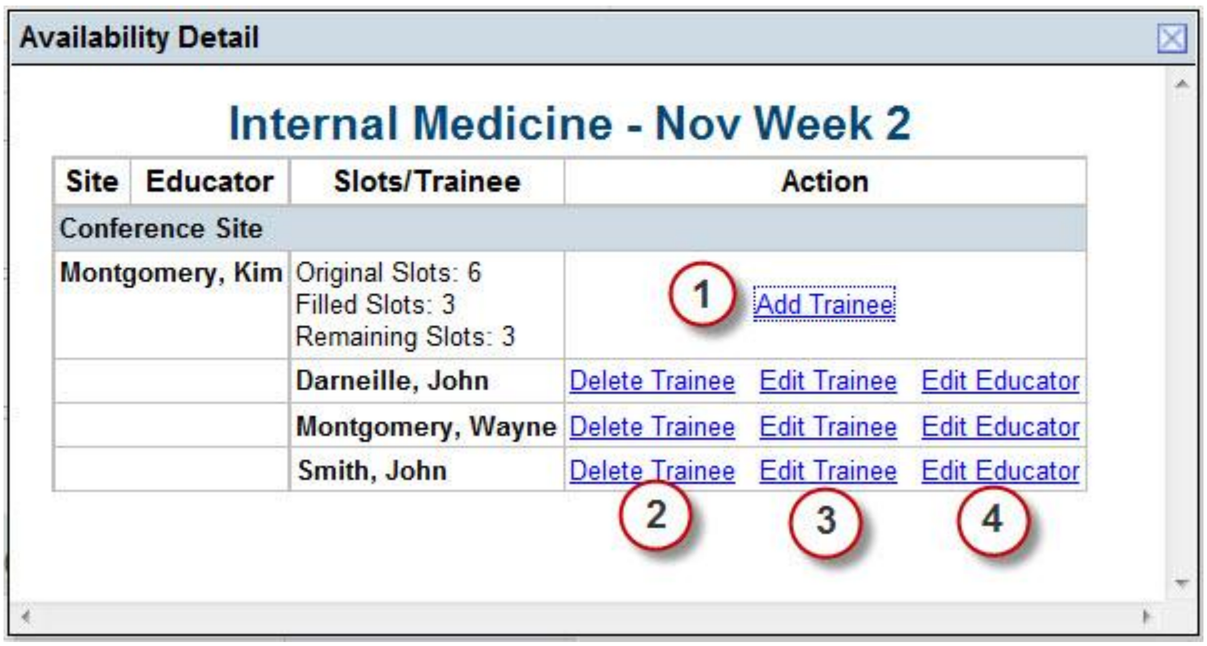
1. **Course/Site/Educator:** The subject that appears here will depend on the **View by** selection made above. To review general information about a specific subject from this grid, select the hyperlink.

   Tip: If you are viewing the schedule by Educator, click the link to view the educator's contact information. Depending on your role permissions, you may also be able to view the courses and/or sites linked to the educator.

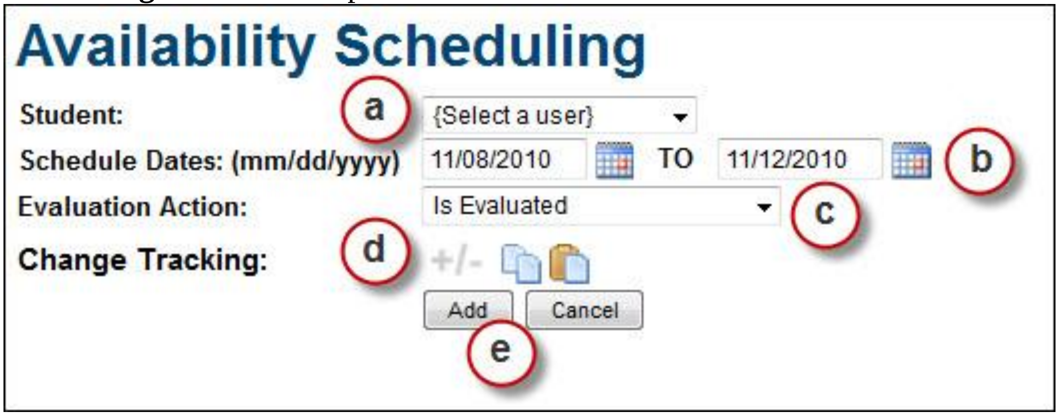
2. **Slots:** Whether you are viewing this grid by course, site, or educator, you can click on the hyperlink number of slots (i.e. 0 of 5, etc) to modify the schedule information.

   Note: If you have gone "Over the Limit" of the availability for an Course/Time Frame, then the slots value will reflect the number scheduled over the limit with a negative value. For example, if the availability is 10, but 11 trainees are scheduled, then the slot value will display as -1.

After selecting a slot hyperlink, the **Availability Detail** window for that course/Time Frame/site/educator will appear. The format will depend on the **View by** selection chosen above. The example below is displayed by Course.



1. Select the **Add Trainee** button to schedule additional users. The **Availability Scheduling** window will open:



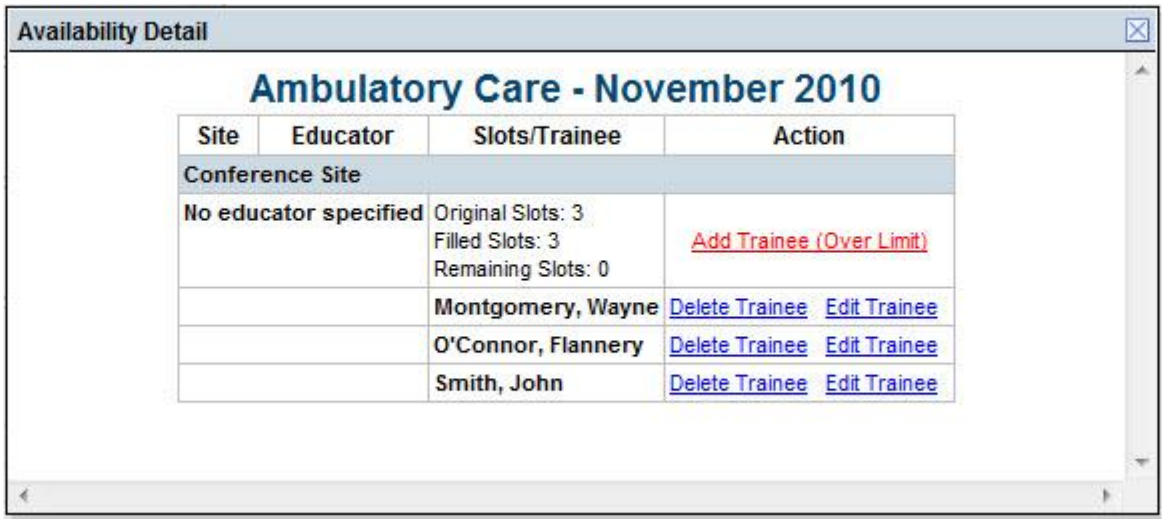
    1. **Student:** Select the student that you wish to schedule.
    2. **Schedule Dates:** Indicate the period of time that the student was participating in this course. The start and end dates default to the start and end dates of the Time Frame selected.
    3. **Evaluation Action:** Indicate whether this user will be evaluated, do evaluations, both or neither.
    4. **Change Tracking:** This is an optional field that will only appear if your program is using the Sched Change Track Parameters tool to track changes to schedules. Select the **+/-** icon to expand the change tracking detail fields. The fields that appear will depend on your program's requirements for tracking changes to schedules.
    5. Select the **Add** button to finish scheduling this user to the selected course/Time Frame. The grid will refresh with your updated schedule information.

    Note: If the trainee's **Schedule Dates** for the entry overlap with any other courses in the Availability Set, a warning message will display the courses that overlap. To continue add the entry despite overlap, select the **Commit** button. Otherwise, select the **Cancel** button.

2. To remove a trainee from the schedule, select the **Delete Trainee** link.
3. To modify a trainee's schedule entry, select the **Edit Trainee** link. The **Availability Scheduling** window shown above will open for the selected trainee. Click the **Update** button to save your changes.
4. To modify the educator for a schedule entry, select the **Edit Educator** link. The **Availability Scheduling** dialogue box will open. Available educators will appear in the select box. Click the **Update** button to save your change.

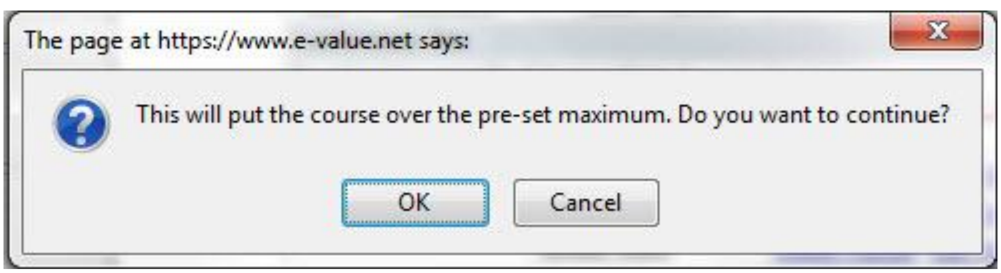
Adding Availability

If you are managing schedules from this tool and find that you need to add availability to an entry, you may do so without navigating away from the screen. If all of the available slots for an entry have been filled, the **Add Trainees** link will appear in red and warn you that adding more trainees will put you over the limit, as seen in the picture below:

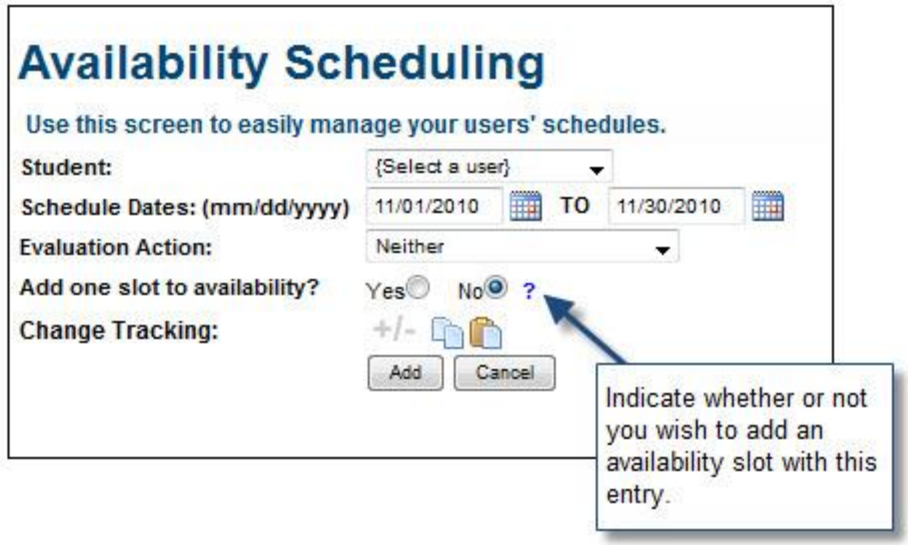


Note:*Certain terms that appear on this screen can be translated for your program and therefore may not match the image above.*

Select the **Add Trainee (Over Limit)** link to continue. A dialogue box will warn you that this action will put the course over the pre-set maximum.



Select **OK** to continue. The **Availability Scheduling** window will display:



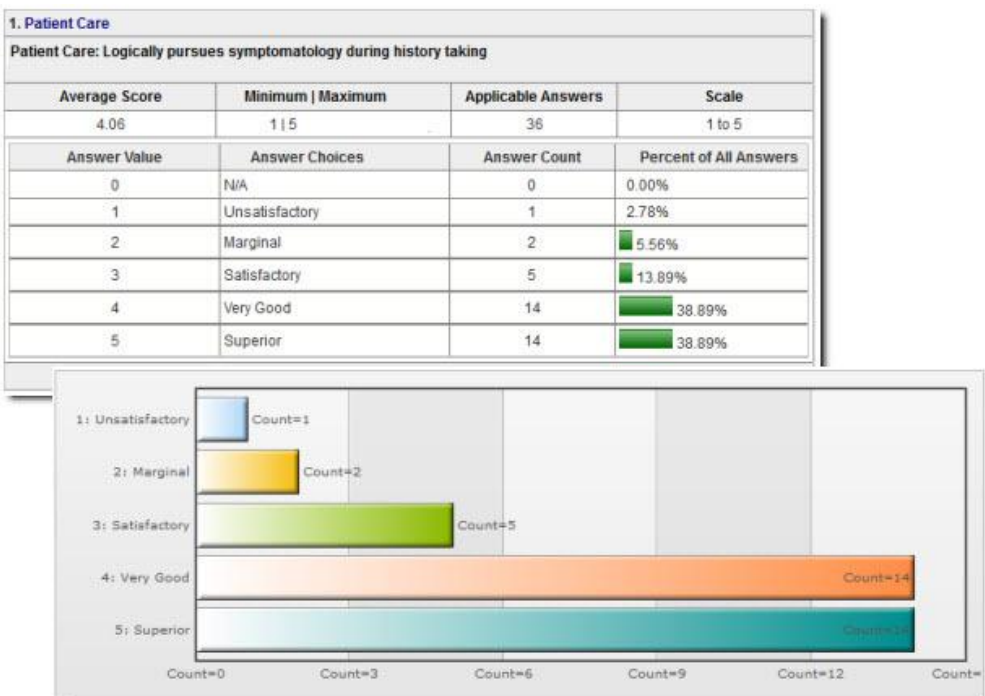
Add one slot to availability?: Use the radio button to indicate if another slot should be added to the availability with this schedule entry.

Student Performance Reports

-> Trainee Reports

About

Performance Reports can be used to view statistical data and comments on completed evaluations. Select the report type based on what you want to included.



1. Patient Care			
Patient Care: Logically pursues symptomatology during history taking			
Average Score	Minimum | Maximum	Applicable Answers	Scale
4.06	1 | 5	36	1 to 5

Answer Value	Answer Choices	Answer Count	Percent of All Answers
0	N/A	0	0.00%
1	Unsatisfactory	1	2.78%
2	Marginal	2	5.56%
3	Satisfactory	5	13.89%
4	Very Good	14	38.89%
5	Superior	14	38.89%

Each report contained under this menu item are described below; click the **Read More** links to view detailed descriptions of the filters included and to see examples.

Aggregate Performance

> The **Trainee Aggregate Performance** report can be used to view aggregate data on evaluations completed *about* a trainee. The report results will include any questions created with a Scale, Multiple Choice, Multi-select or Numeric question-type. For authorized users, the report will include links to Comment and Short Answer question-types. Use Trainee Performance reports to:

- View summarized data on evaluations completed *about a trainee*, including means, counts, and standard deviations
- View by individual trainee or summarized for a group of trainees
- Filter by Site, Course, Evaluation Type, and/or Question
- Generate graphical displays: Time Series, Frequency Distribution, Pie Charts, Bar Charts
- Quickly view Comment questions answered about trainees

Comments

The **Trainee Comments** report can be used to view Comments and Short Answer-type questions entered about trainees on completed evaluations. The comments will display in chronological order. The report can be generated either with the name of the Evaluator who left the comments displaying, or as anonymous comments. The ability to see who the identity of the evaluator who left the comment will depend on your Role and the program's **Anonymity Setup**. Program Directors may use this report to view comments designated as Confidential. Links may be provided for quickly viewing performance data and full evaluations associated with the comments, per your Role's Anonymity Setup.

Eval Answers Crosstab

The **Evaluation Answers Crosstab** allows you to download evaluation responses in a report that is grouped by Evaluation Subject. Data can be downloaded for any Evaluation Type in your program and all questions can be included, regardless of question type. Once the report generates, you can export the raw data to Excel, PDF or Word formats.

Programs frequently use this report to communicate grade information to registrars by filtering on a Question or **Question Group** that captures grade scores. However, it could serve a number of purposes where raw evaluation results are needed.

Performance by Type

The **Trainee Performance by Type** report can be used to view aggregate and detail data for questions answered *about trainees* by Evaluation Type. The report can display grouped by individual trainee, or as an aggregate of scores for all trainees included in the report criteria. This report is useful for:

- displaying evaluation data broken out by trainee
- generating a single report that includes scale, comment, multiple choice, numeric and short answer-type questions (multi-select question types are not included).

Ranking

The **Trainee Ranking** report can be used to compare the standing of trainees based on standardized scores, scores converted to a percentage, and actual score averages. Administrators, Advisors and Directors can compare trainees to one another; however trainees will only be able to see their own ranking data. Comparisons between Trainees will be most useful when the number of questions answered about each are roughly equivalent.

Scores

The **Trainee Scores** report can be used to view raw scores answered *about a trainee* for a given question, across Courses and Time Frames. Additionally, an average, low/high score and count of applicable answers is displayed for each question. Please note that only scale-type questions will be included in this report.