This guide will provide you with details about each of the sessions and step-by-step instructions for the majority of the topics covered in each session. In addition to this guide your dedicated Client Service Consultant can guide you through any of the components within E*Value.
All of the information (and more) found in this User Guide can be found on online via the Help button.
Session:
User Management and Biographic Database Architecture

Bio Data

About
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.

Tip: Medical Schools are strongly encouraged to export their residents' information from ERAS for uploading into E*Value. This will both reduce data entry time and ensure that important information about your residents is available in E*Value. For more information on how to export your data from ERAS and submit it to E*Value, see ERAS Export.

Contents
- Biographic Data
  - Before Adding a User
- Biographic Information
  - Required Fields
  - Add New User
  - Custom Fields
  - Home Program
- Additional Tabs
- User Managed Biographic Data
- View Change History

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.

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:

**Attention**

This individual already has a user profile in E*Value in another institution.

Do you wish to link the profile into your program?

Please indicate your preference below.

- Yes, link the existing user profile to my program. I understand I may not have full update rights to the user information.

- No, don’t link the existing user profile to my program. I want to create a new profile to which I will have full update rights.

[Submit]

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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.

**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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Field Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Legal First Name</td>
<td>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</td>
</tr>
<tr>
<td>Legal Middle Name</td>
<td></td>
</tr>
<tr>
<td>Legal Last Name</td>
<td></td>
</tr>
<tr>
<td>Previous Last Names</td>
<td>Optional</td>
</tr>
<tr>
<td>Title</td>
<td>Optional, e.g. Dr., Mr., Ms.</td>
</tr>
<tr>
<td><strong>Preferred First Name</strong></td>
<td>Required field that will be used for evaluations and reporting</td>
</tr>
<tr>
<td>MI</td>
<td>Optional</td>
</tr>
<tr>
<td><strong>Preferred Last Name</strong></td>
<td>Required field that will be used for evaluations and reporting</td>
</tr>
<tr>
<td>Credentials</td>
<td>Optional, e.g. MD, RN, PhD</td>
</tr>
<tr>
<td><strong>Password/Login Name/User ID</strong></td>
<td>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.</td>
</tr>
<tr>
<td>External ID</td>
<td>Optional</td>
</tr>
<tr>
<td>National Provider Identifier (NPI)</td>
<td>HIPAA has required all health care providers to have &amp; 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 NPI on reports, make sure it is entered here.</td>
</tr>
<tr>
<td>Employee ID</td>
<td>Optional</td>
</tr>
<tr>
<td>Race</td>
<td>Optional</td>
</tr>
<tr>
<td>Gender</td>
<td>Optional</td>
</tr>
<tr>
<td>Inbound Rotator</td>
<td>Once an account has been created you can flag the user as an Inbound Rotator from another program or from another institution.</td>
</tr>
<tr>
<td>Field</td>
<td>Field Description</td>
</tr>
<tr>
<td>-------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Birth date</td>
<td>All dates require a four-digit year (mm/dd/yyyy)</td>
</tr>
<tr>
<td>Birth Place</td>
<td>Optional</td>
</tr>
<tr>
<td>Citizenship Country</td>
<td>Optional</td>
</tr>
<tr>
<td>Visa Status</td>
<td>Optional field with the choices Active, Expired, NA</td>
</tr>
<tr>
<td>Visa Type</td>
<td>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</td>
</tr>
<tr>
<td>Visa Exp Date</td>
<td>All dates require a four-digit year (mm/dd/yyyy)</td>
</tr>
<tr>
<td>Picture file</td>
<td>The name of the .gif or .jpg file image of the user. Electronic picture files must be uploaded.</td>
</tr>
<tr>
<td>Email address</td>
<td>E<em>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</em>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.</td>
</tr>
<tr>
<td>Status</td>
<td>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.</td>
</tr>
<tr>
<td>Current Rank</td>
<td>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.</td>
</tr>
<tr>
<td>Picture</td>
<td>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.</td>
</tr>
<tr>
<td>Notes</td>
<td>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.</td>
</tr>
</tbody>
</table>
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.

Custom Fields

In addition to the standard fields described above, users can add custom fields for tracking information. Currently, there are two different methods for creating custom fields - the legacy method and the dynamic method. The legacy method limits the placement of custom fields to either the Miscellaneous or Scores tab, whereas the dynamic method enables you to place custom fields on the Biographic Information, Training and Education, Exam Scores, Contact or Miscellaneous tabs. Furthermore, dynamic custom fields are used throughout E*Value, not just for Biographic Data.

Home Program

Users may be linked to multiple programs. Defining the correct home program for a user is essential to creating accurate reports and editing certain user data, such as training history. In the example shown above, user Kim Montgomery - a Booth University user - may rotate to OB, Pediatrics and Family Medicine. Regardless of where Ms. Montgomery rotates, her home program remains Booth University. A user's home program is listed at the top of each page of the user profile. Home program can be changed only by a user's home program Administrator.

To change a user's home program, click on the program listed. A dialogue box will open with the following:

1. **Home Program**: Select the program to be used as the home program from the select box drop-down.

2. **Click the Change Home Program to finalize the change.**

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.

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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.

### User Managed Biographic Data

You may grant your users access to manage any of the Biographic Data fields. The fields can be assigned by user role, people group or rank. This may be useful, for example, if you would like users to be able to update their email address or emergency contact information. Contact your Client Service Consultant if you are interested in using this functionality. You must tell your CSC who should be able to manage the information and which specific fields you would like to grant them access to. The users will be able to manage these fields from the User Home page. When this functionality is turned on, the following form will appear at the bottom of the home page:

The user would click the **Edit** button to manage the biographic data fields that they have been given access to modify.
View Change History

Select the View history button to view any changes that have been made to the tab you are viewing. This button is located in the top right portion of each tab, or within the tab itself if the tab is comprised of multiple sections. The history is sorted by field and listed in chronological order. To assist in locating changes, a filter is provided in the history pop-up window.

People Groups allow you to create groupings of users. Once created, these groups assist with various E*Value administration tasks, including reporting, scheduling and promoting users to their next training level.

Using the People Groups tool, each program can define their unique groups. There is no limit to the number of groups you can create or to the number of groups a user can be assigned. Examples of groups you may find useful include:

- Residents who have chosen a specific pathway
- Tenured and non-tenured faculty
- Domestic and international residents
- Track A students and track B students

To Create and Edit a People Group:

1. **Group Description:** Enter an identifying name for the group. If you intend to use this group for promoting users to their next trainee level, we recommend a name such as "Class of 2010," "Intern Class of 2010," etc.

2. **Make available on Promotions Screen:** Select ‘Yes’ from this drop-down menu if you intend to use this group when promoting users to their next student level; otherwise, leave the default ‘No’ option.

3. **Groups Used in Coursework Grading:** Indicate whether or the not the group can be used for grading coursework.

4. **PxDx Reminder Group Type:** Indicate whether or not this group will be used to generate PxDx Reminder Emails. See PxDx Reminders for more information.
5. Select the **Add Group** button to finish creating the group. Your group will be added to the list of available **People Groups** at the bottom of the screen.

6. If you need to edit any of the fields defined in Steps 1-3 for the group, select the **Edit** button in the **Action** menu. If you determine that you no longer need this group, select the **Delete** button in the **Action** column.

To associate users with a **People Group**, see the **Assign Users to Group** help page.

---

**Assigning Users to a People Group:** Once you have created a **People Group**, you must associate users with that group. There are two methods for assigning a user to a group. The first method is useful for assigning a group to an individual user and requires that you add the group to that user’s **Roles, Groups, and Specialties** tab under the **Biographic Data** menu.

The second method utilizes the **Assign Users to Groups** tool and it is useful for assigning multiple users to a group based on their shared user criteria (though individuals can be added using this method as well). Additionally, if you are scheduling users into **Course Sessions** by **People Group**, this tool allows you to specify unique **Effective Dates** for the individuals in the group.

**Contents**

- Assigning Users to a People Group
- Managing Course Session Groups by Effective Date

**Assigning Users to a People Group**

Follow the steps below to assign users to a people group:
1. **Select group:** Select the group from the drop-down menu. Only groups created with the **People Group** tool will appear in this list.

2. To help locate specific users based on identifying criteria, you may filter the list of **Available Users** by selecting one or more of the following filter options:
   a. **Filter Rank:** Select an option from the available ranks. Ranks are assigned on an individual user's **Biographic Information** tab under the **Biographic Data** menu.
   b. **Filter Role:** Select an option from the available roles. Roles are assigned on an individual user's **Roles, Groups, and Specialties** tab under the **Biographic Data** menu.
   c. **Filter Last Name:** Enter at least one letter of the user's last name to filter by last name.
   d. **Filter Status:** Select an option from the available status options. Status is defined along with Rank on an individual user's **Biographic Information** tab under the **Biographic Data** menu.
   e. **Limit to Home Subunit:** Select this check box if you want to limit results to users who belong to your program.

3. Select the **Refresh Available Users** button to repopulate the **Available Users** list with users matching the criteria defined in Step 2. If no users match your criteria, the list will appear blank. If this occurs, consider broadening your filter criteria or reviewing your users **Biographic Data**.
4. Highlight the users you want to add to the group. To highlight several users at once, select their names while holding down the Ctrl, Shift or Apple key. Click the Add button to move users from the Available Users list to the Group Members list.

Managing Course Session Groups by Effective Date

Optionally, your program may elect to schedule Course Sessions by people group. The advantage of scheduling Course Sessions by people group is that you can manage who is scheduled without modifying your Session setup. Instead, you would adjust a user’s Effective Date for the scheduled group using the Assign Users to Groups tool. The user will only be scheduled for sessions that occur on or after his or her effective date for the group. If evaluations are set to generate for the Course Session, they will only generate for those sessions that occur on or after a user’s Effective Date. Notify your Client Service Consultant if you would like the ability to schedule sessions by people group.

Note: If your program is using this functionality, you will no longer be able to assign groups to a user on the Roles, Groups, and Specialties tab under the Biographic Data menu. You will still be able to review an individual’s groups from that tab.

1. Select group: Select the group from the drop-down menu. Only groups created with the People Group tool will appear in this list.
2. To help locate specific users based on identifying criteria, you may filter the list of **Available Users** by selecting one or more of the following filter options:

   a. **Filter Rank:** Select an option from the available ranks. Ranks are assigned on an individual user's **Biographic Information** tab under the **Biographic Data** menu.

   b. **Filter Role:** Select an option from the available roles. Roles are assigned on an individual user's **Roles, Groups, and Specialties** tab under the **Biographic Data** menu.

   c. **Filter Last Name:** Enter at least one letter of the user's last name to filter by last name.

   d. **Filter Status:** Select an option from the available status options. Status is defined along with Rank on an individual user's **Biographic Information** tab under the **Biographic Data** menu.

   e. **Limit to Home Subunit:** Select this check box if you want to limit results to users who belong to your program.

3. Select the **Refresh Available Users** button to repopulate the **Available Users** list with users matching the criteria defined in Step 2. If no users match your criteria, the list will appear blank. If this occurs, consider broadening your filter criteria or reviewing your users **Biographic Data**.

4. **Available Users:** Select the user(s) to be included in the group. To highlight several users at once, select their names while holding down the Ctrl, Shift or Apple key.

5. **Effective Date:** Indicate the date that the selected users should become active in the group. Click the **Add** button to move users from the **Available Users** list to the **Group Members** list.

   **Note:** You may also use the **Effective Date** field to indicate that a user is no longer an active member of a group. Highlight the user(s) to be removed from the group in the **Group Members** list. Use the date picker to indicate the date that the selected users should no longer be considered part of that group. Click the **Remove** button. In this way, you will still be able to run reports related to sessions for that user that fall within range of his or her effective dates.

6. **Note** that a user's **Effective Date** will display next to his or her name in the **Group Members** list

**Permissions:** View and update E*Value privileges for your users, including report anonymity and menu access, and designate Directors and Advisors for your program.

Information contained in this guide is confidential and proprietary
Anonymity - Setup

Anonymity is one of the most important features of E*Value. It is also one of the areas that is most vulnerable to misinterpretation between client and Client Service staff. For this reason, the Anonymity Setup tool is intended to allow you to modify your own anonymity settings. This is optional, as you may prefer to leave the administration of this to Advanced Informatics staff.

If you choose to use this tool, please notify your Client Service Consultant, so that he or she can assign the appropriate menu items. Your program will need to define who should have access to view and modify anonymity settings. That user will be given the role of Anonymity Administrator. This role will have access to the Anonymity Setup menu.

Anonymity Considerations

Before modifying Anonymity settings for a role, there are a few considerations to bear in mind when granting access to view evaluation data:

- If you grant a role access to view a type of evaluation to which they previously did not have access, you will also need to confirm that they have the menu items needed to view that data.

For example: If you are granting your students the ability to view reports about their evaluations online for the first time, you would change their anonymity settings from 0 (cannot see the evaluation data at all) to 4 (can see the full evaluation and data). In order for the student to be able to pull up the evaluations about themselves, they will need to also be assigned the appropriate menu items. This will be done by your Client Service Consultant. Those menu items are the following:

- There are two “hard coded” rules. These two rules are in place regardless of the anonymity settings or menu items assigned:
  - A Clinical Educator can only see anonymous data about themselves.
  - When viewing evaluation data about themselves, the Program Director will only be able to see the data in aggregate and will not be able to see the individual evaluations.
- When setting up anonymity for a role, grant the widest access by rule and then limit the access by using the exceptions. It is not advisable to set the rule at no access and then grant access by using the exceptions.
Define Anonymity Settings

The setup of anonymity settings is described below:

Report Anonymity Settings

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

1. **Role of Report Viewer**: This field defines the role that you are currently setting up. The list will fill with all of the roles that are currently linked to this program.

2. **Rank of Evaluator**: You can make the anonymity setting specific for an evaluator rank. For example, you could specify that a Course Director can see everything except for evaluations completed by someone with the rank of Health Care Professional.

3. **Rank of Subject**: You can make the anonymity setting specific to the subject's rank. For example, you could specify that a Course Director can see everything except for evaluations completed about someone with the rank of MS1.

4. **Course**: You can make the anonymity setting based on the activity. For example, you could specify that a Program Director can see everything except for evaluations completed on the Program Evaluation course.

5. **Type of Evaluation**: You can make the anonymity setting based on the type of evaluation being completed. For example, you could say that a Program Director can see everything except for Program Evaluations.

6. **Rule vs. Exception**: For each role there has to be a general rule setting, to which you can then add exceptions. You will need to indicate if the setting you are creating is the general rule or an exception to the general rule. Every role needs one general rule, but cannot have more than one.

7. Select a setting from the available settings:
<table>
<thead>
<tr>
<th>Level</th>
<th>Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access level 0</td>
<td>The viewer can see nothing about this evaluation.</td>
</tr>
<tr>
<td>Access level 1</td>
<td>The viewer can see the data, but not who said it nor can they see the full evaluation.</td>
</tr>
<tr>
<td>Access level 2</td>
<td>The viewer can see the data. They cannot see who said it but they can see the full evaluation.</td>
</tr>
<tr>
<td>Access level 3</td>
<td>The viewer can see the data and the evaluator, but not the full evaluation.</td>
</tr>
<tr>
<td>Access level 4</td>
<td>The viewer can see everything.</td>
</tr>
</tbody>
</table>

8. Select the **Add Setting** button to complete the task.

Once a setting has been modified or added an email notice will go to the Program Director and Email Administrator to notify them of the change.

**Anonymity - View**

Access to data in E*Value Performance Reports is restricted by the Role assigned to the individual viewing the report. To review the anonymity setup for the Roles in your program, use the Anonymity Setup View tool. The Viewing Rights Level assigned to a particular Role will control the data that can be viewed, whether or not the name of the evaluator is shown, and whether or not a link is provided to the full evaluation. A Rule is generally set to cover the Viewing Rights that most often apply, but Exceptions to this Rule can also be created so that Anonymity rights can be tailored by Evaluating Rank, report Subject Rank, Course and/or Evaluation Type.

Note: Access to Performance Reports will also depend on whether or not a Role has been assigned the menu item for a particular report. To see the menu items currently assigned to a particular Role, or to request a menu item, use the Security View tool. Additionally, the Director and Advisor tools should be used to indicate who or what the Anonymity rules here apply to (i.e. what Course does an Course Director manage, which students does an Advisor advise, etc).
Select the Explain link to see a pop-up message explaining the settings for the selected role. If you have access to the Anonymity Settings tool, then you may modify your security settings. Otherwise, contact your program Administrator or Client Service Consultant to request changes to your programs Anonymity Settings.
Privileges

The Directors tool allows you to grant various people in your program access to view information related to the entity they direct. For example, Course Director roles may be given access to view evaluation information related to the course they direct. Similarly, Rank Directors may be given access to information about the members of that rank. The type of information directors are granted access to is defined during the process of getting your program online. Director options/privileges that can be defined here include:

- Whether or not Directors receive Schedule Change Notifications for their directorships
- Whether or not Directors receive Low Score Notices for their directorships
- Whether or not Program Directors receive notices about Confidential Comment questions
- Whether or not Directors have access to their directorships’ MyFolio

The Advisors tool can be used to grant advisors access to their advisees’ information. As a general rule, advisors are given access to all evaluation information about their advisees. In order for E*Value to display the appropriate advisee information, the specific advisor-student relationship must be established. Advisee options include:

- Receive low score notices about their advisees
- Receive notices when a “Graded” question is answered about their advisees
- Grant access to advisee MyFolio

Profile Data Download

The Profile Data Download tool allows you to report on the biographical data stored in E*Value, including:

- All standard fields maintained with the Biographic Data tool
- All Custom Fields that have been created for your Biographic Data
- Training History, Stipend Information and Immunization and Certification data

The selected data can be generated in Excel, Word or Browser formats. When the data is downloaded using the Dynamic Grids option, you will have the ability to filter the data further and export the filtered data to Excel. Excel can be used for further statistical analysis and mail merging.

Selecting User Data

The filter screen allows you to select the data fields to be included in the download report, indicate a display sort order, and filter the users to be included. When the report is generated in Excel, Word or Browser formats.
HTML format you will have additional filtering capabilities available after running the report; you will have the option to export the filtered data to an Excel file.

Step 1: Which Biographic Data fields should be included in the report? Check all that apply.

- To select every possible field at once, including those in the expandable sections, click Select All. To un-select any currently selected fields, click Un-Select All.
- **Users**: Commonly used profile data fields are available from the top of the filter screen.
- Additional user data fields are divided into expandable sections similar to the various tabs included on a user's Biographic Data profile. In general, your selections will display in
both a merged table (or tab) of all information, as well as sub-tables (or tabs) for each section. Available sections will depend on your program setup and role permissions. You can click the +/-icons to expand the list of fields available in each section. The possible sections include:

- **User Biographic Fields** - Includes fields from the **Biographic Information**, **Contact** and **Miscellaneous** tabs of Biographic Data. Please note, the ability to download Social Security Numbers stored in E*Value is limited to the user assigned the SSN Admin Role. This Role can only be assigned to one user at a time and it must be assigned by an E*Value Client Service Consultant. Other fields may be restricted by request to your Client Service Consultant.

- **Program Information** - Includes program data that is linked to your user profiles. The Home Program for a user can be managed from the **Biographic Information** tab.

- **Immunization and Certifications** - Includes Immunization and Certification fields. Only **Immunizations and Certifications** linked to your program will be available. Access to this tab can be restricted by role; if the tab is restricted for your role, then the section will not be available from the User Data Download tool. When information from this section is exported to Excel, it will export in several formats: a list, a crosstab (Xtab) and as part of the merged data tab.

- **User Custom Fields** - Includes the Biographic **Custom Fields** that have been created for your program.

- **Training History** - Includes fields from the **Training and Education** tab. This tab is most frequently used by Graduate Medical Education programs. It may not be applicable to your program and if not, it will not display.

- **Stipend Information** - Include fields from the **Stipends** tab. This tab is most frequently used by Graduate Medical Education program’s that use E*Value’s financial reimbursement tool - E*gme. It may not be applicable to your program, or it may be restricted by Role.

- **Scores** - Includes fields from the **Exam Scores** tab. Access to this tab can be restricted by role; if the tab is restricted for your role, then the section will not be available from the User Data Download tool.

**Step 2: Should the fields be displayed in a specific order?**

- **User Field Display Order**: Fields selected from the **Users**, **User Biographic Fields** and **Scores** sections will populate in this list. You may order the information according to how you would like it to appear on the report by highlighting the field and using the **Move Up** and **Move Down** buttons.
Step 3: How should the data be displayed?

**Export As:** The data can be downloaded in several formats. There are advantages and disadvantages to each format, depending on what you would like to do with the data:

- **Excel options:** For large volumes of data, we recommend using one of the Excel options. Excel also provides the most flexibility for sorting and analyzing the data. Please note, although Excel can support all available fields for 20,000+ users, external factors may nonetheless cause a time-out failure for large downloads. For example, our server may not be able to support large requests made during E*Value’s peak hours of use. Alternatively, a slowed internet connection on your machine may also cause a time out failure. If a time out occurs, you may try again at a non-peak hour (i.e. early morning or evening), or you may contact your Client Service Consultant for assistance. There are two Excel options:
  - **Excel Spreadsheet:** This format will export a merged table of biographic fields, as well as additional sheets-tabs for the fields selected from each of the expandable sections.
  - **Merged Excel Spreadsheet:** This format will export to one sheet in the Excel file, regardless of the field types selected above. The sheet will be grouped by user, then sub-grouped based on the additional fields selected. Biographic Information will display in a single row. Additional fields that you have selected will display in the columns following the biographic fields.

- **MS Word Document:** Word format can support a limited amount of data. This format is only recommended for viewing about a half dozen fields at one time.

- **Browser/HTML Tables:** This format will display a merged table of the Biographic and Contact Information selected as well as individual tables for the fields selected from each of the expandable sections. The primary advantage of this method is the ability to sort the tables using any of the fields included.

- **Browser/Dynamic Grids:** This format will display a merged table of the Biographic and Contact Information selected as well as individual tables for the fields selected from each of the expandable sections. This format provides the ability to filter the report results based on user-defined criteria. The filtered data can also be exported to Excel. Please note, you will not be able to sort the fields directly from the browser interface; however you can export the results to Excel for sorting and data manipulation.

Step 4: Should report data be limited to users from a certain Program, Group, Rank or Role?

- **Filter Results Based On:** You may filter the users to be included in the report with any combination of User Name, Group, Rank, Role, and Status.

**Tip:** Users assigned a Parent-level Administrator role can also filter by Program. This capability may be useful for enterprise-level programs, such as GME offices and School of Medicine programs.

Information contained in this guide is confidential and proprietary
- **Limit to Home Program**: Parent-level Administrator roles can filter by Program. They will also have the option to limit results to user's home program.

**Step 5: Generate the report.**
- Click the **Generate Report** button to continue.

**Sorting HTML Tables**

When the report is exported using the **Browser/HTML** option, you have the ability to re-sort the data using the arrow icons located in the column headers:

```
<table>
<thead>
<tr>
<th>User ID</th>
<th>Status</th>
<th>Last Name</th>
<th>First Name</th>
<th>IC Type</th>
<th>IC Status</th>
<th>Event Date</th>
<th>Exp Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>592980</td>
<td>Active</td>
<td>Humphrey</td>
<td>Hubert</td>
<td>Background Check</td>
<td>Met</td>
<td>12/21/2010</td>
<td>02/17/2011</td>
</tr>
<tr>
<td>642474</td>
<td>Active</td>
<td>Jall</td>
<td>Tariq</td>
<td>Background Check</td>
<td>Met</td>
<td>12/21/2010</td>
<td>02/17/2011</td>
</tr>
<tr>
<td>642474</td>
<td>Active</td>
<td>Jall</td>
<td>Tariq</td>
<td>HIPAA</td>
<td>Met</td>
<td>12/01/2014</td>
<td>12/01/2014</td>
</tr>
<tr>
<td>634918</td>
<td>Active</td>
<td>John</td>
<td>Pemberton</td>
<td>Drug Screening</td>
<td>Met</td>
<td>11/30/2010</td>
<td>11/30/2011</td>
</tr>
<tr>
<td>634918</td>
<td>Active</td>
<td>John</td>
<td>Pemberton</td>
<td>Influenza</td>
<td>Met</td>
<td>11/01/2010</td>
<td>11/01/2011</td>
</tr>
<tr>
<td>634918</td>
<td>Active</td>
<td>John</td>
<td>Pemberton</td>
<td>Background Check</td>
<td>Met</td>
<td>11/01/2010</td>
<td>11/01/2011</td>
</tr>
<tr>
<td>634918</td>
<td>Active</td>
<td>John</td>
<td>Pemberton</td>
<td>Tetanus</td>
<td>Met</td>
<td>11/30/2010</td>
<td>11/30/2011</td>
</tr>
<tr>
<td>634918</td>
<td>Active</td>
<td>John</td>
<td>Pemberton</td>
<td>CPR Certification</td>
<td>Met</td>
<td>11/15/2012</td>
<td>11/15/2012</td>
</tr>
<tr>
<td>642475</td>
<td>Active</td>
<td>Walgreen</td>
<td>Charles</td>
<td>CPR Certification</td>
<td>Met</td>
<td>12/06/2010</td>
<td>12/06/2012</td>
</tr>
<tr>
<td>592980</td>
<td>Active</td>
<td>Humphrey</td>
<td>Hubert</td>
<td>Drug Screening</td>
<td>Not Met</td>
<td></td>
<td></td>
</tr>
<tr>
<td>592980</td>
<td>Active</td>
<td>Humphrey</td>
<td>Hubert</td>
<td>Influenza</td>
<td>Not Met</td>
<td></td>
<td></td>
</tr>
<tr>
<td>592980</td>
<td>Active</td>
<td>Humphrey</td>
<td>Hubert</td>
<td>HIPAA</td>
<td>Not Met</td>
<td></td>
<td></td>
</tr>
<tr>
<td>592980</td>
<td>Active</td>
<td>Humphrey</td>
<td>Hubert</td>
<td>Tetanus</td>
<td>Not Met</td>
<td></td>
<td></td>
</tr>
<tr>
<td>592980</td>
<td>Active</td>
<td>Humphrey</td>
<td>Hubert</td>
<td>CPR Certification</td>
<td>Not Met</td>
<td></td>
<td></td>
</tr>
<tr>
<td>634918</td>
<td>Active</td>
<td>John</td>
<td>Pemberton</td>
<td>HIPAA</td>
<td>Pending</td>
<td>12/31/2010</td>
<td>12/31/2011</td>
</tr>
<tr>
<td>642475</td>
<td>Active</td>
<td>Walgreen</td>
<td>Charles</td>
<td>Background Check</td>
<td>To Be Entered</td>
<td>12/06/2010</td>
<td>02/23/2011</td>
</tr>
</tbody>
</table>
```

**Filtering & Exporting Dynamic Grids**

When the report is exported using either of the **Browser/Dynamic Grid** options, you have the ability to filter the report results on the fields included in the download. These filtered results can then be exported to Excel for further statistical analysis.
### Choose a Variable

You have the option to filter the fields included in the download. Select the filter variable and enter your criteria. You may add as many filters as necessary. Click **Apply** to re-filter the table.

### Rows per page

By default, the downloaded data will display 10 rows at a time per table. Use the select list to display up to 100 rows at a time.

### Export to Excel Spreadsheet

You have the option to export these tables to Excel. If you have applied filters to the downloaded data, only the filtered data will be exported.

---

<table>
<thead>
<tr>
<th>USER ID</th>
<th>LAST NAME</th>
<th>FIRST NAME</th>
<th>BIRTH DATE</th>
<th>PERMANENT MAILING ADDRESS</th>
<th>PERMANENT MAILING CITY</th>
<th>RANK NAME</th>
</tr>
</thead>
<tbody>
<tr>
<td>642475</td>
<td>Cushing</td>
<td>Harvey</td>
<td>06/01/1984</td>
<td>1111 Evergreen Terrace</td>
<td>Spokane</td>
<td>PGY2</td>
</tr>
<tr>
<td>2012054</td>
<td>Eggers</td>
<td>Alice</td>
<td>05/04/1983</td>
<td>321 Easy St.</td>
<td>Hartford</td>
<td>PGY1</td>
</tr>
<tr>
<td>2011979</td>
<td>Fisher</td>
<td>Mary Stuart</td>
<td>12/10/1980</td>
<td>10 2nd St.</td>
<td>Minneapolis</td>
<td>PGY2</td>
</tr>
<tr>
<td>2011975</td>
<td>Humphrey</td>
<td>Hubert</td>
<td>02/11/1984</td>
<td>42 Avenue S</td>
<td>Springfield</td>
<td>PGY2</td>
</tr>
<tr>
<td>2011955</td>
<td>Mayo</td>
<td>Charles Horace</td>
<td>01/15/1984</td>
<td>2500 Pleasant Ave</td>
<td>Minneapolis</td>
<td>PGY1</td>
</tr>
<tr>
<td>634917</td>
<td>Nightengale</td>
<td>Florence</td>
<td>02/11/1979</td>
<td>140 Polk St.</td>
<td>Minneapolis</td>
<td>PGY1</td>
</tr>
<tr>
<td>634918</td>
<td>Pasteur</td>
<td>Louis</td>
<td>09/18/1981</td>
<td>750 Jefferson St.</td>
<td>Minneapolis</td>
<td>PGY1</td>
</tr>
<tr>
<td>642474</td>
<td>Pemberton</td>
<td>John</td>
<td>11/18/2011</td>
<td></td>
<td></td>
<td>PGY2</td>
</tr>
</tbody>
</table>
**Schedules:** The Schedules component contains all of the tools necessary to build, manage and report on scheduled courses and evaluations, including:

- Define your program's Courses, Sites, Time Frames and Default Educators
- Assign and edit user schedules using one or more of E*Value's robust schedule tools (may include scheduling courses, rotations and/or evaluations)**
- Configure settings for allowing students to make schedule requests (optional)
- Manage user schedule requests, with auditing and wait list capabilities
- View and print user schedules and additional details about Courses and Sites

** Please note, additional setup - not contained in this component - is needed to assign schedules via Optimization Scheduling. See EVOS for more information.

**Schedule Details**

Before you can begin building schedules, your program's schedule details (activities, sites, schedule periods) must be entered into E*Value. Many of these details may have been imported into your program as part of the E*Value implementation. You may use the tools in this section to update, add and review the schedule details in your program.

**Courses:** This tool is used to create and manage Courses. Courses may be something a user is scheduled into, such as an internal medicine rotation or course, or something else that needs to be evaluated or graded on a specific date for a specific group of users.

**Courses and E*Value**

Courses serve a number of key functions in E*Value, including:

- If Evaluations are linked to an Course, user schedules can be used to generate evaluations. E*Value will look to Courses on your user schedules, as well as the Evaluation Action specified on schedule entries, to determine who and what evaluations generate. Site evaluations can also be generated based on the Course for a schedule entry (if your program uses E*Value's Site Scheduling functionality).
- Graduate Medical Education (GME) programs that use E*Gme in conjunction with E*Value must use Courses to create “mappings” of their reimbursable hours using the
Courses on student schedules. E*Gme is a companion module to E*Value that is used by some GME programs to calculate and document financial reimbursements and agreements. Since Course parameters are especially important for these programs, users with the role of E*gme Administrator can ‘lock’ a course from within the program using the Course tool.

- **Coursework** is another form of evaluation available in E*Value. Like Evaluations, Coursework is linked to your Courses and will generate based on user schedules. In fact, Coursework forms are essentially a type of evaluation module, with several distinct characteristics: “Grader” questions can be added to the form for completion by educators or advisors; coursework can generate on a date in relation to the Time Frame, or it can generate “on-the-fly” at any point during the scheduled Time Frame; coursework can be assigned a due date.

- E*Value offers a number of Schedule methods to meet program needs. All of these methods utilize Courses to indicate what a student, educator or faculty member is scheduled to be doing at a certain time.

**Note:** If your program uses E*Value’s Shifts Scheduling functionality, the Course must be flagged with the Shift Scheduling indicator.

- **Sessions** must be linked to Courses if you wish to use the Sessions functionality. The Sessions tool is often used to schedule lectures, clubs, course labs, or other didactic activities. Sessions can also be evaluated, regardless of whether or not evaluations are linked to the Course used to create the sessions.

- **Curriculum Elements** can be linked to your Courses if you wish to use E*Value’s Curriculum Mapping functionality. Curriculum Elements are defined as any learning objective or outcome. By mapping these Elements to your Courses, programs can track how often students are exposed to each Element based on schedule information. See Curriculum Elements Reports for information on how this data can be reported.

- Courses can be specified on Duty Hours log entries. The Courses selection may be optional or mandatory, depending on a program’s Duty Hours Rules Setup.

- **Examinations** offer another form of evaluation within E*Value. Like Evaluations and Coursework, Exams must be linked to Courses. While it is possible to link Exams to your existing block or schedule Courses, to simplify Exam generation and avoid scheduling issues, it is best practice to create an course specific to generating exams. When creating the course, be sure to give a descriptive label and use the “Tests” Course Type. This type allows you to schedule exams without creating overlaps with your block schedules.

- Use the Courses tool to flag courses for use with PxDx (Procedure and Diagnosis Tracking).
Add a New Course

The basic steps for creating a new course are described below:

1. **Course Name:** Enter a name for the course in this field. Choose a name that is unique and clearly recognized by you and your users.

2. **Course Name Abbreviation:** You may indicate an abbreviation for that course name. This is optional.

3. **Type:** The type of course will also need to be defined. The available types include:
   a. Block - A normal rotation would have a Block course type. Also note that E*gme will pull data for any course with the type of Block, Vacation or Clinic.
   b. Call
   c. Conference - This type can be used to evaluate conferences.
   d. Testing
   e. Vacation - Note that E*gme will pull data for any course with the type of Block, Vacation or Clinic. If your vacation is NOT reimbursable, please use the 'Other' type and label it as vacation.
   f. Other - Could be used to evaluate an advisory session, or the program itself. Additionally, if your program is using E*gme and does not reimburse Vacation, use the 'Other' type for vacations instead of the 'Vacation' type.
   g. Clinic or In-House Call - Note that E*gme will pull data for any course with the type of Block, Vacation or Clinic.
   h. Course
i. Lecture - If you select 'Lecture,' additional fields will prompt you to specify if lecture topics and/or dates should be included when entering your users into the schedule.

j. Outbound Rotation - This type should be used to indicate a rotation that should not be included in calculations for the Medicare reimbursement, but should be included when calculating the affiliation agreements. **PLEASE DO NOT USE** this type unless instructed to do so by your finance office.

k. MyFolio Evaluation - If your program is using the MyFolio tool, this type can be used to evaluate your MyFolio.

**E*gme:** If your program uses the E*gme reimbursement tool and you are entering a reimbursable course, you must select a **Block, Clinic** or **Vacation** type for reimbursements to calculate for that course. Generally speaking, courses that involve patient care are reimbursable.

4. **Content:** Enter the content, or focus, of the course. The available options for this field are customized for your program. Contact your Client Service Consultant to add additional options if necessary.

5. **Training Setting:** Select a training setting describing where the course is conducted.

6. **Primary Training Site:** Indicate the primary location where each clinical course takes place.

**E*gme:** If your program uses the E*gme reimbursement tool, be certain to select the actual, physical location where this training will take place. Your E*gme office must have an affiliation agreement in place for the selected site in order for reimbursements to calculate correctly.

7. **Available for Procedures and Diagnosis:** If you are using the procedure tracking or diagnosis tracking feature (PxDx) you will also be asked to indicate whether or not procedures or diagnoses are tracked on this course.

8. **Duty Hours:** If you are tracking Duty Hours and this course has been granted an extension to the maximum # of hours allowed per week by the ACGME, then you can enter the correct maximum here. Otherwise, the number defaults to 80.

9. **Available for Duty Hours:** Indicate whether or not Duty Hours are tracked on this course.

10. **Show on Calendar:** You can also choose to display the course on the personal calendars of users who have been scheduled on this course.

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

Information contained in this guide is confidential and proprietary
11. **Create for Shift Scheduling:** This is an optional field that will appear if your program has elected to use **Shift Scheduling**. Indicate if this course will utilize shift scheduling.

12. **Documents:** To link curriculum documents to this course, select the **Upload Document** button to browse for and upload a document. Highlight the document from the **Available** list and use the arrow buttons to move to the appropriate documents to the **selected** list. You may tag the document with MeSH terms (Medical Subject Headings). For more information, see the **MeSH Terms help page**. Users scheduled into the course will be able to download any documents linked here from the **My Profile > Program Info > Curriculum Documents** menu item.

**Tip:** You may request that your scheduled users receive email notifications for these documents with one of the following: 1) a notice that curriculum documents are available, 2) a notice with links to the documents or 3) a notice with documents attached. You may specify your program preferences for both student and educator notifications. You may also opt to have no notices sent. Contact your Client Service Consultant if you would like to change your preferences.

13. **Optimized Scheduling:** This is an optional field that will appear if your program has elected to use **Schedule Optimization**.

14. **MeSH Terms:** To assign a MeSH Term click on the **Add** link. This will open a pop-up window where you can create a link between the course and the MeSH Term. For more information, see the **MeSH Terms help page**.

15. **Notes:** If you would like to enter a note regarding this course you can do so here.

Any Custom Fields your program has defined for Course will appear in the bottom portion of the screen. Once you have populated the form, select the **Add Course** button to save your Course information.

**E*gme:** It is possible to have automatic email notifications sent to the E*gme Administrator and/or Reimbursement Manager when new activities are added for your program or institution. If you would like to take advantage of this option, please contact your E*gme client service consultant.
Depending on the permissions you have been granted, one of two screens will appear. If you do not have permission to link courses, you will be returned to a list of your courses. Simply contact your E*Value Client Service Consultant to relay which evaluations you would like to have linked to this new course. Once evaluations have been linked to the course (a process that takes only moments), it will be ready for use.

Alternatively, your role may have permission to link evaluations for your program. In this case, you will be prompted to link courses at this time. See Link Evaluations to Courses below for more information.

Link Evaluations to Courses

If you have permission to link evaluations for your program, you will be prompted to do so after defining the characteristics of the Course.

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

Selecting No will return you to the Courses Management page. Selecting Yes will prompt the next question:

Would you like to link the same Evaluations that have already been linked to another activity?

Yes No

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

Select No to begin a brief wizard that will allow you to link evaluations to your new course as described below in the Link Evaluations Wizard section. Alternatively, select Yes to use the same evaluations that have been linked to another course using a brief wizard that will allow you to clone evaluations to your new course from an existing course, described below in the Clone Evaluations Wizard section.

Link Evaluations Wizard

The wizard for defining a new configuration will begin with a list of evaluation types that are currently in use by your program.

Information contained in this guide is confidential and proprietary
1. Select the evaluation type(s) from the list that you would like to link to the new course.

2. Click **Next** button once the selection has been made.

3. The next screen will display all of the evaluation types that you selected with a drop-down list of question sets. If you are not certain which questions are asked on a specific evaluation form listed, you can preview the evaluation by clicking the **Preview** button.

4. Select the **Next** button once the selection has been made. If none of the options presented meet your needs, select 'Not Available.' This will generate an email to your Client Service Consultant who will contact you regarding the new evaluation form you would like to create.

5. You will be given another opportunity to review the evaluation forms you have selected. You again have the option to preview a form, this time by selecting the form number. If you would like to make changes click the **Back** button. If you are satisfied with the changes, click the **Finish** button.

6. A table displaying the history of the evaluation setup changes made to your program will appear. Column headers in blue can be used to sort the table.

If you have any questions or concerns about changes that were made, please contact your Client Service Consultant.

**Clone Evaluations Wizard**

The wizard for cloning evaluations that have been linked to another course begins with a table of existing evaluations with the courses down the left hand side, the evaluation modules listed across the top and the evaluation form question set IDs displaying in the various cells. To preview
an evaluation form, click on its ID number. If you decide to not clone from an course you can click the link located below the table marked **click here**.

1. Select the Course you want to clone from the link in the **Clone Evaluations** table.

2. You will be able to review your selection. Click the **Back** button to change the selection you have made.

3. Click the **Link** button to link these evaluations to your new course.

4. A history of the evaluation setup changes made to your program will appear on the next screen. Column headers in blue can be used to sort the table.

If you have any questions or concerns about changes that were made, please contact your Client Service Consultant.

**Add a Course Custom Field**

If your role has been granted access to manage custom fields, then you will be able to add custom fields to your course creation screen. Begin by clicking the **Manage Custom Fields** button at the top of the **Add Course Form**:

![Manage Custom Fields Button](image)

The **Manage Course Custom Fields** screen will appear in a pop-up window. Use this tool to add custom fields to the Courses Management page. For more information on using custom fields, see **Manage Custom Fields**.

**E*gle: Lock Courses**

Course parameters are especially important for those programs that use our financial reimbursement tool, E*gle. In order to ensure that the parameters of a created course are not altered over time, a user with the role of E*gle Administrator can ‘lock’ an course from within the program. The lock checkbox is located in the **Defined Activities** table at the bottom of the Course creation screen.

![Course Parameters Table](image)
Sites: this tool is used to manage your program's site information. Using the functionality described below, you can edit the information tracked for your sites and add new sites to your program.

Before Adding a Site

Before adding a new site, we recommend verifying that the site has not already been entered into your program.

Note: If your institution uses the E*Value reimbursement tool E*gme, your ability to manage sites will depend on your program configuration. If your ability to add sites has been restricted, you will receive a message stating, "Your program is a member of an E*GME institution which has implemented tightened controls on Site Management. If you need to add a new site, please contact your GME Office for assistance."

1. Filter: You may filter by site name. Enter the name of the site and select the Filter button. If a match is found, the site information will appear in a table. To include Inactive sites, uncheck the Active Only box. Check the Name Contains box to return sites that include any part of the name entered in the text box.

2. List All Sites: To see a list of all the sites entered for your program, select the List All Sites button. The sites will display in a table. This table may include additional fields to those shown below if your program is tracking custom site fields.
Adding a New Site

If you have verified that a site is not already included in your program, click the **Add New Site** button to create the new site.

The fields on the following screen will depend on your program configuration and user role. In its most basic configuration, you will be prompted only to enter a **Name** for the new site. However, there is no limit to the number of fields that can be tracked for sites using **Custom Fields**. If fields have been added for your program, they will also display.

1. The **Manage Custom Fields** button is used to create any additional fields that are tracked for your sites. The button will only display if your role has been granted the appropriate access.

2. **Site Name**: The **Site Name** field is a required field for all programs. Once you have entered a name and populated any custom fields, click the **Add** button to finish adding the site. You will be able to add and edit contact information for the site once it has been added.

Using Standard & Custom Fields to Modify Site Pop-Up

You can share information about a site with users who have access to Site and Schedule Reports. On these reports, users can click the site name to view additional information, including location, primary/secondary contacts, and any additional custom fields, in a pop-up window.
1. **Action:** Click the **edit** link to modify the site name and create/edit custom fields.

2. Click the site name to preview the site pop-up window that will display for this site on site reports.

3. **Contact/Content Information:** Click the **add** link to modify standard fields, including Primary and Secondary contact information for the site.

**Note:** By default, this contact information will display on the Site pop-up for Site and Schedule Reports. You may prevent the contact information from displaying on Site Reports, Schedule Reports or Both. Contact your Client Service Consultant to specify your preference.
Custom Fields

You may add custom fields that will display in the site pop-up window on Site and Schedule Reports. Click the edit link. If your role has the appropriate permissions, you may click the Manage Custom Fields button to define custom fields. This process is similar to managing all E*Value custom fields, explained here. Note that if you would like a custom field to display in the grid of sites, you must check the Show on Grid? box.

Standard Fields

Once you have added a new site, you may populate standard fields, including contact information, for the site. Click the add link in the site's Contact/Content Information column.
1. Enter the location address to display a Google map of the site on the site pop-up window.

2. Enter **Primary** and **Secondary** contact information.

**Note:** By default, this information will display on the Site pop-up for Site and Schedule Reports. You may prevent the contact information from displaying on Site Reports, Schedule Reports, or both. Contact your Client Service Consultant to specify your preference.

3. Once you have updated the standard fields, click the **Add** button. If Educators have been linked to the site (using the **Educator Site Links** tool), you may be asked to review their current **Organization Contact Information**. This information pulls from the **Contact** tab of the Educator’s **Biographic Data**. If you would like to update this
To update the linked Educator's contact information to match the site, select the Educator here. Please note that this will update the Educator's Organization Contact Information in the Biographic Data Contact tab and for all other sites the Educator may be linked to. If you do not want to update Educator contact information, simply click the Continue button.
Example Site Pop-Up

Here is an example of a site pop-up window displaying standard and custom field information:

1. **Address**: The address entered for the site will display and a Google map for that address will generate.

2. **Primary and Secondary Contacts**: By default, the contact information entered will display. You may prevent the contact information from displaying on this pop-up in Site
Reports, Schedule Reports or Both. Contact your Client Service Consultant to specify your preference.

3. **Linked Educators:** Educators that have been linked to the site using the Educator Site Links tool will display here. You may click an Educator name to view their contact information.

4. **Linked Courses:** Courses that list the site as its Primary Training Site, or that have been linked using the Site Course Links tool, will display here. You may click on course to view general information.

5. **Custom Fields:** Any site custom fields that have been created will display here.

**Site Affiliations** If a portion of your program’s clinical education occurs at sites outside your main facilities, your institution’s legal offices or your accrediting boards may require that you have an affiliation agreement with those outside sites. The Site Affiliation tool provides an easy way to manage your site affiliations, track affiliation expiration dates and manage reimbursements for affiliated educators and sites.

**Note:** This functionality is different than the Affiliations Management tools used by Graduate Medical Education (GME) programs to track affiliations and Medicare reimbursements. The functionality described in this tutorial is primarily used by Allied Health and Pharmacy programs.

**Adding a New Site Affiliation**

To create an affiliation, begin by selecting the Add New Affiliation button.

The Affiliations Details screen will display. Populate the fields described below to add a new affiliation:

Information contained in this guide is confidential and proprietary
Manage Custom Fields

Copy Existing Affiliation: [Select an Existing Affiliation]

Site Group: [All Site Groups]

Available Sites
- Conference Site
- Franklin CVS Pharmacy
- Harney Hospital (Inactive)
- Harney University (Inactive)
- MG University
- Nicotelle CVS Pharmacy
- Park Nicotelle
- RC College of Pharmacy
- RC Hospital
- Ross Hall

Selected Sites
- Al Medical
- Holt Blvd Clinic

Affiliation Name: Community Health Partners
Start Date: 02/01/2010
End Date: 02/16/2016
Renewal Type: Manual
Affiliation Documents: 11405_Affiliation_Agreement.docx
Show on Site Reports: Yes
Initiate Date: 02/16/2011

Contact First Name: Anne
Contact Last Name: Naveen
Contact Position: Director
Contact Department: Community Health Partners
Contact Email: anaveed@chpartners.org
Contact Phone: 612-231-1234

Contact Address 1: 2100 8th Ave. S.
Contact City: Minneapolis
Contact State: MN
Contact Zip Code: __-__

Notes:
Agreement will be renewed by mutual consent of the parties for an unlimited number of renewal terms of 5 years each. Agreement covers 4 activities.

Reimbursements:
<table>
<thead>
<tr>
<th>Activity</th>
<th>Payee</th>
<th>Amount</th>
<th>Type</th>
<th>Ranks</th>
<th>Start Date</th>
<th>End Date</th>
<th>Notes</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ambulatory Care</td>
<td>Preceptor</td>
<td>$50</td>
<td>Per-Trainee</td>
<td>All</td>
<td>02/01/2010</td>
<td>02/16/2016</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
1. Begin by selecting the sites to be included in the agreement:

   a. **Copy Existing Affiliation:** If this is the first affiliation created in your program, there will not be any existing affiliations to copy. However, once an affiliation has been created, you can use it as a template for additional affiliations by selecting it here.

   **Tip:** Copying an existing affiliation is especially useful if you have a standard affiliation with some minor changes that can be applied over and over. If you do not want to copy an existing affiliation, leave this field at the default 'Select an Existing Affiliation.'

   b. **Site Group:** You can filter the list of **Available Sites** by group, if you have set up **Site Groups**. You will also be able to filter affiliation reports by site group. This may be helpful, for example, if you have a corporate entity with a single affiliation that applies to a large group of sites.

   c. **Available Sites:** Use the add icon to move site(s) that should be included in the agreement from the **Available Sites** list to the **Select Sites** list. You can select multiple sites at once using the Ctrl, Shift and Apple keys.

2. Next, select and enter the parameters of the agreement:

   a. **Affiliation Name:** Enter a descriptive label for the affiliation.

   b. **Start and End Dates:** Enter the effective dates of the agreement. The End Date can be used to generate expiration notifications, as explained in the Create Site Affiliation Expiration Reminders section below.

   c. **Renewal Type:** Select the renewal type. Manual indicates that nothing will happen upon the end date of the affiliation; it simply expires. If you select the Automatic renewal type, the Program Administrator will receive a notice on the expiration date stating that the affiliation is automatically being renewed. On that same date, a copy of the affiliation will be created with a Start Date occurring the day after the previous expiration date. The End Date of the new affiliation is calculated based on the length of the previous affiliation. Additionally, any reimbursements that existed for the original affiliation will carry over to the new affiliation.

   d. **Affiliation Documents:** Upload documents related to the affiliation agreement, such as contracts, addendums and reimbursement schedules in this field. You can upload as many documents as you need by clicking the folder icon. You can remove a document by clicking on the remove icon.

   e. **Show on Site Reports:** This field defaults to 'Yes.' If 'Yes' is selected, then affiliations will show as a column on the **Site Management** page. The names of any currently active affiliations will be listed as links in that cell of the matrix. Clicking on the link will take the user to the **Affiliation Details** page for that affiliation.
f. **Initiate Date:** This is the date of the original affiliation agreement that is tracked for historical purposes.

3. **Contact Fields:** Record the contact information of the external individual and/or organization responsible for the maintenance of this affiliation agreement.

4. **Notes:** Record any additional notes on the affiliation in the notes space provided.

5. **Reimbursements:** You can use an affiliation agreement to set up and calculate reimbursement of sites and preceptors. Note that you cannot add reimbursements when you are creating a new affiliation. You can access the reimbursement information after the affiliation is created, as described below in the **Add Reimbursement Information** section.

6. **Custom Fields:** If you need to track any additional information that is unique to your program, you can create custom fields by clicking the **Manage Custom Fields** button at the top of the page. Custom fields will be displayed at the bottom of an affiliation agreement page under the **Custom Fields** section header. For more information on managing custom fields, see **Managing Custom Fields**.

7. Select the **Update** button at the bottom of the screen to finish creating the affiliation.

---

**Viewing Existing Affiliations**

To view or edit an existing affiliation, use the **View Existing Affiliations** filter on the main Site Affiliation screen as described below:

1. **Start and End Date:** Enter the date range for the affiliations you would like to view. The dates will default to one year starting from the current date, so that you can quickly review and manage currently active affiliations. To view additional affiliation data, simply modify the date range.
2. **Site Group and Site:** You may filter the list of **Available Sites** by group, if you have set up **Site Groups**. You will also be able to filter affiliation reports by site group. This may be helpful, for example, if you have a corporate entity with a single affiliation that applies to a large group of sites. You may also filter for a specific **Site**.

3. There are two viewing options available: **Condensed** or **Expanded**. Select **Condensed** to only view sites with existing affiliations. Select **Expanded** to return results for all sites matching your filter criteria, regardless of whether or not they have an affiliation. You will be able to add agreements to these sites from the table.

Select the **View** button. The results matching your criteria will populate in the bottom half of the screen in the **Existing Affiliations** table.

![Click on any of the column header links to re-sort the table.](image)

1. Click on any of the column header links to re-sort the table.

2. Click on a **Site** name to open the **Site Details** panel. This panel displays site information that can be managed from the **Sites** tool. Additionally, any existing agreements will be listed under the **Address** information. Click an affiliation to open the **Affiliation Details** screen described above.

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3. If documents have been linked to the affiliation agreement for a site, you can download those documents by clicking on the document icon.

4. The **Action** column contains icons for the following:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Add Affiliation" /></td>
<td><strong>Add Affiliation</strong> - Click this icon to open the Affiliation Details page for a site. This will only be an option when viewing the table in Expanded mode.</td>
</tr>
<tr>
<td><img src="image" alt="Edit Affiliation" /></td>
<td><strong>Edit Affiliation</strong> - Click this icon to open the existing Affiliation Details for editing.</td>
</tr>
<tr>
<td><img src="image" alt="Delete Affiliation" /></td>
<td><strong>Delete Affiliation</strong> - Click this icon to delete an existing affiliation.</td>
</tr>
</tbody>
</table>

You can also use the **Affiliate Listing** report to view existing affiliation information.

### Adding Reimbursement Information

You can use an existing affiliation agreement to set up and calculate reimbursement of sites and preceptors. Click the **Edit Affiliations** icon to open the **Affiliation Details** screen. Unlike when the affiliation was created, the **Reimbursements** section will be active:

<table>
<thead>
<tr>
<th>Activity</th>
<th>Payee</th>
<th>Amount</th>
<th>Type</th>
<th>Ranks</th>
<th>Start Date</th>
<th>End Date</th>
<th>Notes</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ambulatory Care</td>
<td>Preceptor</td>
<td>$500</td>
<td>Per Trainee</td>
<td>All</td>
<td>02/01/2010</td>
<td>02/16/2016</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ambulatory Care</td>
<td>Preceptor</td>
<td>$250</td>
<td>Per Timeframe</td>
<td>All</td>
<td>02/01/2010</td>
<td>02/16/2016</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Anesthesiology</td>
<td>Preceptor</td>
<td>$50</td>
<td>Per Timeframe</td>
<td>All</td>
<td>02/01/2010</td>
<td>02/16/2016</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cardiovascular Disease</td>
<td>Preceptor</td>
<td>$50</td>
<td>Per Trainee</td>
<td>All</td>
<td>02/01/2010</td>
<td>02/16/2016</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Clinical Skills</td>
<td>Preceptor</td>
<td>$50</td>
<td>Per Trainee</td>
<td>All</td>
<td>02/01/2010</td>
<td>02/16/2016</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Click the icon to Add a Reimbursement. The **Reimbursement Detail** window will open.
1. **Start and End Date**: Enter the date range that will be reimbursable. The dates will default to the length of the affiliation specified in the agreement.

   **Tip**: If your affiliation agreement will likely be renewed and you want to calculate reimbursement beyond the end date of the affiliation agreement for budgeting purposes, simply adjust the **End Date** here. Though these details default to the affiliation agreement dates, they can be managed independently.

2. **Course Group and Courses**: Next you will select the courses that are reimbursable. You can filter the list of **Available Courses** by group, if you have set up **Course Groups**. Use the add icon to move courses that should be included in the agreement from the **Available Courses** list to the **Selected Courses** list. You can select multiple courses at once using the Ctrl, Shift and Apple keys. Moving an course into the selected box indicates that reimbursement will be made for this course.

3. **Payee**: Indicate who should receive the reimbursement. To pay the educator directly, select Preceptor. To pay the site where the activity occurs, select Site. To pay a third party, select **Other** and then enter the name of the payee in the **Payee if other** text field. If no reimbursement will occur, select **None**.

4. **Amount**: Enter the amount that will be reimbursed. This can be calculated on a **Per Student** or **Per Time Frame** basis.

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5. **Vendor ID:** Enter a Vendor ID, if applicable.

6. **Type:** Indicate how the reimbursement amount should be calculated. Select Per Student if the amount should be calculated based on the number of scheduled students. Select Per Time Frame if the amount should be calculated based on the number of Time Frames with scheduled students. If you choose the Per Time Frame option, the number of students scheduled in each Time Frame will not be a factor.

   **For Example:** There are two students in timeframe #1 and one trainee in Time Frame #2. The reimbursement rate is $200. If you choose Per Student, the reimbursement amount will be $400 in Time Frame #1 and $200 in Time Frame #2. If you choose Per Time Frame, the reimbursement amount will be $200 in Time Frame #1 and $200 in Time Frame #2.

7. **Rank:** Reimbursement amounts can be calculated by rank, if necessary. For example you may only reimburse for fourth year students. Or the amount you reimburse for fourth year students may be different than what you reimburse for first year students, even though they rotate to the same site with the same educators. Select the rank(s) that should be included for this reimbursement.

8. **Notes:** Record any additional notes on the reimbursement for this agreement in the notes space provided.

9. Click the **Save Site Affiliation Reimbursement** button to save the details. You will be returned to the **Affiliation Details** page, where you can continue to add reimbursements, if necessary.

**Important Note:** When you are done setting up your reimbursements make sure you click the **Update** button at the bottom of the **Affiliation Details** screen. The updates you make will not be saved until you have saved the affiliation agreement.

While most affiliate reimbursements can be managed from this tool, there are often situations when an exception needs to be made. For example, certain educators may be paid a rate that is different than the prevailing rate for a particular site. To manage these exceptions, use the **Site Preceptor Reimbursement** tool. Once you have added your reimbursement details, you can see your affiliation reimbursement calculations and manage payments using the **Affiliate Reimbursement Report**.

**Creating Site Affiliation Expiration Reminders**

One of the key benefits of managing your affiliations in E*Value is the ability to set up automatic reminders based on the end dates of your agreements using the **Program Reminders** tool.
1. **Event Type**: To send out a reminder about the end of an affiliation agreement, select the **Site Affiliation End Date** option.

**Note**: Be sure to select the correct event type - **Site Affiliation End Date**. Do not confuse the type with Affiliation Agreement Expiration Date, which is specific to residency program reimbursements.

2. **Notification Email(s)**: Select the user roles that should receive the reminder. You may select multiple roles using the Shift, Ctrl or Apple keys.

3. **Reminder Interval**: Enter the number of days that should elapse between email reminders.

4. **Reminder Frequency**: Enter the total number of reminders that should be sent.

**For Example**: E*Value looks to the **Site Affiliation End Date** and then counts backwards based on the **Frequency** and **Interval** to generate reminders. If your affiliation ends on June 30th and you want a reminder every week for a month, you can set the Interval at 7 and the Frequency at 4. E*Value will count back 28 days and generate reminders on June 2nd, June 9th, June 16th, and June 23rd.

5. **Email Subject Text**: Enter a subject line for the email that will be sent to the individuals assigned the roles selected in Step 2.

**Tip**: @eventdate@ and @entityname@ are called “stubs” and they give you the ability to customize this email for each affiliation. @eventdate@ will be replaced in the actual email with the Site Affiliation End Date. @entityname@ will be replaced by the Site Affiliation Name. These

Information contained in this guide is confidential and proprietary
two stubs make it much easier for the person receiving the reminder email to know which affiliation it is for and when the expiration date is.

6. **Email Text:** Enter the text of the email that will be sent.

7. **Notes:** Record any additional notes for the remainder in the notes space provided.

8. Click the **Submit** button to save the reminder details. The reminder emails will generate based on the criteria saved.

---

**Time Frames** are another key concept in E*Value. A Time Frame is used to indicate the period of time that a course takes place. A defined Time Frame will include a start date, end date, evaluation generation date and, if you are using the curriculum notification tool, a document generation date. When you schedule users, you will indicate the Time Frame that they should be scheduled into for a given course.

Time Frames can be created through several different methods using the **Time Frames** tool:

- **Basic Time Frame:** Create a single Time Frame with a single evaluation generation date
- **Series of Basic Time Frames:** Auto-generate a series of basic Time Frames based on intervals you define
- **Multiple Evaluation Generation Dates within a Single Time Frame:** Create a group of generation rules that can be used to assigned multiple evaluations during a single Time Frame

Enterprise-level programs, such as a GME office of a School of Medicine program, also have the option to create Time Frames that are then shared with their child-level programs. The child-level program will only be able to modify the Time Frame’s evaluation and document notification generation dates, but not the Time Frame start and end dates.

**Filtering Existing Time Frames**

Before creating a new Time Frame, it is best practice to filter for the date range to be used to ensure that the Time Frame has not already been created.
You may filter the existing Time Frames by **Status** or by **From and To** dates.

Click the **Show/Add Time Frames** button to review existing Time Frames:

<table>
<thead>
<tr>
<th>Time Frame</th>
<th>Start Date</th>
<th>End Date</th>
<th>Days</th>
<th>Eval Generation Date(s)</th>
<th>Doc Notification Date</th>
<th>Status</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>July 2012</td>
<td>07/01/2012</td>
<td>07/31/2012</td>
<td>31</td>
<td>07/26/2012 - GME Office</td>
<td>06/30/2012</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>August 2012</td>
<td>08/01/2012</td>
<td>08/31/2012</td>
<td>31</td>
<td>08/26/2012 - GME Office</td>
<td>07/31/2012</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>September 2012</td>
<td>09/01/2012</td>
<td>09/30/2012</td>
<td>30</td>
<td>09/25/2012 - GME Office</td>
<td>09/01/2012</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>October 2012</td>
<td>10/01/2012</td>
<td>10/31/2012</td>
<td>31</td>
<td>10/26/2012 - GME Office</td>
<td>09/30/2012</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>November 2012</td>
<td>11/01/2012</td>
<td>11/30/2012</td>
<td>30</td>
<td>11/25/2012 - GME Office</td>
<td>10/31/2012</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>December 2012</td>
<td>12/01/2012</td>
<td>12/31/2012</td>
<td>31</td>
<td>12/26/2012 - GME Office</td>
<td>11/30/2012</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>January 2013</td>
<td>01/01/2013</td>
<td>01/31/2013</td>
<td>31</td>
<td>01/26/2013 - GME Office</td>
<td>12/31/2012</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>February 2013</td>
<td>02/01/2013</td>
<td>02/28/2013</td>
<td>28</td>
<td>02/23/2013 - GME Office</td>
<td>01/31/2013</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>March 2013</td>
<td>03/01/2013</td>
<td>03/31/2013</td>
<td>31</td>
<td>03/26/2013 - GME Office</td>
<td>02/28/2013</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>April 2013</td>
<td>04/01/2013</td>
<td>04/30/2013</td>
<td>30</td>
<td>04/25/2013 - GME Office</td>
<td>03/31/2013</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>May 2013</td>
<td>05/01/2013</td>
<td>05/31/2013</td>
<td>31</td>
<td>05/26/2013 - GME Office</td>
<td>04/30/2013</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>June 2013</td>
<td>06/01/2013</td>
<td>06/30/2013</td>
<td>30</td>
<td>06/25/2013 - GME Office</td>
<td>05/31/2013</td>
<td>Active</td>
<td></td>
</tr>
</tbody>
</table>

If none of the existing Time Frames meet your scheduling or evaluation needs, you may create a new Time Frame, as described in the next section.
Creating Basic Time Frames

After filtering for existing Time Frames, you will have the ability to create a new Time Frame using the fields in the top portion of the screen:

1. **Time Frame Label**: Enter the new Time Frame label into the text box. Sample Time Frames are "February 2003," "First Quarter 2004" and "Block 1 05-06," etc.

2. **Begin and End Date**: Select a begin and end date for your Time Frame.

3. **Document Notification Date**: If you are using E*Value's Curriculum Management tool, indicate the date that documents should be generated. This normally occurs toward the beginning of the Time Frame or even before the Time Frame start date.

   **Note**: If there are no documents attached to the course, then this date will be ignored. The documents must be attached and users scheduled before the date entered here in order for the documents to generate.

4. **Evaluation Generation Dates**: Use a check box to specify the date on which you would like evaluations associated with this Time Frame to become available to the evaluators. Evaluations will generate at 11:00 P.M. Central Time on this date. So, for example, if you want your users to receive the evaluations on the 8/10, enter a generation date of 8/9. You may either specify the specific date, or use a pre-defined Multiple Generation Date Group if evaluations will need to be generated multiple times during the time period.

   **Tip**: For basic Time Frames, we typically recommend that evaluations generate at least 5 to 10 days before the end of the course, thereby giving the educator and the student an opportunity to review the evaluation together, if applicable.

5. Select the Add Time Frame button to finish creating the Time Frame.

You will see the new Time Frame appear in the list of current Time Frames in the bottom half of the screen.
Creating Multiple Time Frames

You can create multiple Time Frames at once if they will occur according to a set parameter - by days, weeks, months or 28-day periods. To create multiple Time Frames, select the Create Multiple Time Frames link from the Time Frames filter screen:

On the next screen you will define the base re-occurrence for your Time Frames in the field labeled I want to base my Time Frames on. If your students change courses on the first day of the month, multiple Time Frames can be generated based on 'Calendar Months.' Or the Time Frames can be based on 'Days' if your students change courses every 28 days, for example. Both types are described below.

Time Frames based on Calendar Months

If you have selected 'Calendar Months,' the screen will refresh to allow you to enter the parameters of your multiple Time Frame, as described below:

1. I want to base my Time Frames on: Use this field to select the re-occurrence parameters for the Time Frames. The remainder of the screen will refresh with additional fields based
on your selection. The additional fields for Calendar Months are reviewed in the remainder of this section.

2. **What is the first month...:** Select the first month for which you would like to generate Time Frames from the drop-down menu. The list will default to the current month.

3. **How many Time Frames...:** Select the number of Time Frames you wish to create. You can create up to one year’s worth of Time Frames (12) at a time.

4. **Evaluation Generation Dates:** Indicate when you want the evaluations to generate within your Time Frames by entering a number of days and selecting the appropriate option from the drop-down menu. Alternatively, if you have created Generation Rule Groups, you will be able to apply a group to this Time Frame by selecting the corresponding radio button in the Use column.

**Tip:** We normally recommend that evaluations be generated at least 5 days Before the Time Frame End Date to ensure that the student and educator have an opportunity to discuss the evaluation.

5. **When should Curriculum Notifications be sent?** Indicate when you want the Curriculum Notifications to generate within your Time Frames. If you are not using the Curriculum Document tool, then you will not see this field.

Once you have made your selections, click the **Continue** button. You will be able to review the Time Frames on the next screen before they are created.

A table summarizing the information will appear. If you are satisfied with the Time Frames, select the **Create Time Frames** button. You will see a confirmation that your Time Frames have been created. If you are not satisfied with your Time Frames, select the **Back** button to modify your criteria.

**Time Frames based on Days, Weeks or 28-day Periods**

If you have select Days, Weeks or 28-day, then the screen will refresh to allow you to enter the parameters of your multiple Time Frames, as described below:
1. **I want to base my Time Frames on:** Use this field to select the re-occurrence parameters for the Time Frames. The remainder of the screen will refresh with additional fields based on your selection. The additional fields for **Days** are reviewed in the remainder of this section.

2. **What is the start date...:** Enter the start date of your first Time Frame.

3. **How long will each...be in days?** Enter how long each Time Frame will last in days. Note, when creating Time Frames by Week or 28-day periods, this field will be pre-populated and cannot be edited.

4. **How many...would you like to create?** Enter in the number of Time Frames you wish to create. Please note that you can only create one year’s worth of Time Frames at a time.

5. **Evaluation Generation Dates:** Indicate when you want the evaluations to generate within your Time Frames by entering a number of days and selecting the appropriate option from the drop-down menu. Alternatively, if you have created **Generation Rule Groups** used to generate multiple evaluations within a single Time Frame, then you will be able to apply a group to this Time Frame by selecting the corresponding check box in the **Use** column.

   **Tip:** We typically recommend that evaluations be generated at least 5 days Before the Time Frame End Date to ensure that the student and educator have an opportunity to discuss the evaluation.

6. **When should Curriculum Notifications be sent?** Indicate when you want the Curriculum Notifications to generate within your Time Frames. If you are not using the Curriculum Document tool, then you will not see this field.
7. **How would you like to name your Time Frames?:** Each of your Time Frames will be created with a unique name. The name can be formatted as either 'Prefix Number Suffix' (e.g. Block 5 Q1, where "Block" is the user-defined prefix, "5" is an automatically-generated time frame number and "Q1" is a user-defined suffix) or as 'Start Date - End Date' (i.e. 01/01/2007 - 01/28/2007).

Once you have made your selections, click the **Continue** button. You will be able to review the Time Frames on the next screen before they are created.

A table summarizing the information will appear. If you are satisfied with the Time Frames, select the **Create Time Frames** button; otherwise select **Back** to modify the details.

Once created, both individual and multiple Time Frames appear on the bottom half of the main **Time Frame** screen.

<table>
<thead>
<tr>
<th>Time Frame</th>
<th>Start Date</th>
<th>End Date</th>
<th>Days</th>
<th>Eval Generation Date(s)</th>
<th>Doc Notification Date</th>
<th>Status</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>July 2012</td>
<td>07/01/2012</td>
<td>07/31/2012</td>
<td>31</td>
<td>07/26/2012 - GME Office</td>
<td>06/30/2012</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>August 2012</td>
<td>08/01/2012</td>
<td>08/31/2012</td>
<td>31</td>
<td>08/26/2012 - GME Office</td>
<td>07/31/2012</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>September 2012</td>
<td>09/01/2012</td>
<td>09/30/2012</td>
<td>30</td>
<td>09/25/2012 - GME Office</td>
<td>08/31/2012</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>October 2012</td>
<td>10/01/2012</td>
<td>10/31/2012</td>
<td>31</td>
<td>10/26/2012 - GME Office</td>
<td>09/30/2012</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>November 2012</td>
<td>11/01/2012</td>
<td>11/30/2012</td>
<td>30</td>
<td>11/25/2012 - GME Office</td>
<td>10/31/2012</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>December 2012</td>
<td>12/01/2012</td>
<td>12/31/2012</td>
<td>31</td>
<td>12/26/2012 - GME Office</td>
<td>11/30/2012</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>January 2013</td>
<td>01/01/2013</td>
<td>01/31/2013</td>
<td>31</td>
<td>01/26/2013 - GME Office</td>
<td>12/31/2012</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>February 2013</td>
<td>02/01/2013</td>
<td>02/28/2013</td>
<td>28</td>
<td>02/23/2013 - GME Office</td>
<td>01/31/2013</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>March 2013</td>
<td>03/01/2013</td>
<td>03/31/2013</td>
<td>31</td>
<td>03/26/2013 - GME Office</td>
<td>02/28/2013</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>April 2013</td>
<td>04/01/2013</td>
<td>04/30/2013</td>
<td>30</td>
<td>04/25/2013 - GME Office</td>
<td>03/31/2013</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>May 2013</td>
<td>05/01/2013</td>
<td>05/31/2013</td>
<td>31</td>
<td>05/26/2013 - GME Office</td>
<td>04/30/2013</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>June 2013</td>
<td>06/01/2013</td>
<td>06/30/2013</td>
<td>30</td>
<td>06/25/2013 - GME Office</td>
<td>05/31/2013</td>
<td>Active</td>
<td></td>
</tr>
</tbody>
</table>

If you wish to see the Time Frames listed in a different order, select any of the arrow icons in the header to resort the table. To edit the name of a Time Frame, select the **Edit** icon in the **Action** column for that Time Frame. To delete a Time Frame, select the **Delete** icon in the **Action** column for that Time Frame.

**Note:** You can only delete Time Frames that have not been used to schedule or generate evaluations. If you need to delete a Time Frame that has evaluations scheduled or generated within it, contact your E*Value Client Service Consultant for assistance.

**Important:** You may make changes to a schedule up until 11 P.M. CST of a Time Frames’ generation date. At 11 P.M. CST each night, E*Value will locate any Time Frames scheduled to generate evaluations and send out corresponding notices for those course.

**Creating Multiple Evaluation Generation Dates within a Single Time Frame**

With **Multiple Generation Date Time Frames,** you can assign evaluations several times over a single Time Frame. This is useful for programs that generate mid-rotation and end-rotation...
evaluations or programs that want to send out different evaluation types during a single evaluation period.

To create multiple generation dates within a single Time Frame, select the Create Multiple Generation Dates within a Single Time Frame? link from the Time Frames filter screen:

This begins a multi-step process in which you will define your generation date rules and create generation rule groups that will then be linked.

**Step 1: Create generic Generation Rules**

Begin by defining each Generation Rule needed for the Time Frame. For example, if you would like an evaluation to generate at the mid-point of the activity and the end of the activity, then you would create a rule for each.

The Multi-Generation Date Management bar can be used to navigate between setup screens.

1. **Generation Rule Name**: Enter a descriptive label for the rule (i.e. beginning of block, middle of rotation, end of month).
2. **When should evaluations generate?:** Select a generation date based on the number of days before or after the beginning or end of the Time Frame. You may also select to have the generation date be on the Time Frame start or end date.

3. Once you have defined the rule, select the **Save Generation Rule** button. The rule will appear in a table at the bottom of the screen.

**Note:** You can only edit or delete a generation rule that has not been linked to a Generation Rule Group or used to schedule evaluations.

4. You should continue creating as many rules as needed. When you are ready to proceed, click the **Generation Rule Groups** button at the top to advance to the next step.

Next, you will define groups that will contain one or more generation rules.

**Step 2: Create & Assign Generation Rule Groups**

Next, you will add the generations that you just created to a Generation Rule Group.

1. **Generation Group Name:** Enter a label for your generation group. The label will save automatically when you exit the field; you may enter, tab or mouse click out of the field. The screen will refresh for adding generation rules to this group.

2. **Available and Selected Time Frame Generation Rules:** Highlight the generation rule(s) you wish to add to this group.

Information contained in this guide is confidential and proprietary
3. After you have selected your rules, click the Add button to add the rules to this group. The selected Time Frame generation rules will appear in the box on the right. You can also use the Remove button to delete a rule from the list at right.

4. Note that you have the ability to archive generation groups when you are editing the rules assigned using the Status option. If you archive a generation group, it will no longer display as an option from the main Time Frames creation screen. If an archived generation group is linked to upcoming Time Frames, it will remain linked to those Time Frames; you will receive a notice listing any upcoming Time Frames linked to the archived group.

Existing and Archived Groups will display at the bottom of the screen. To display Archived rules, uncheck the Active Only box. If necessary, you may use the options in the Action columns, as described below.

<table>
<thead>
<tr>
<th>Group Name</th>
<th>Status</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fourth Year Final</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>Generate Four Evaluations</td>
<td>Archived</td>
<td></td>
</tr>
<tr>
<td>Mid and Final</td>
<td>Archived</td>
<td></td>
</tr>
<tr>
<td>Multi-generation Rules</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>Normal</td>
<td>Archived</td>
<td></td>
</tr>
</tbody>
</table>

*Generation Rule Groups which are linked to Time Frames cannot be deleted.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="Clone" alt="Clone" /></td>
<td><strong>Clone:</strong> If you clone an existing Generation Group, the Generation Rules linked and the Rank Rules that have been defined will be copied. This may be useful if modifications are needed to an existing setup that is already in use and therefore cannot be edited.</td>
</tr>
<tr>
<td><img src="Edit" alt="Edit" /></td>
<td><strong>Edit:</strong> You may edit the label and status of a Generation Group at any time. The ability to edit the generation rules linked to the group will depend on whether or not the group has been used to schedule evaluations.</td>
</tr>
<tr>
<td><img src="Delete" alt="Delete" /></td>
<td><strong>Delete:</strong> You may delete Generation Groups that have not been used to schedule evaluations. If a group is in use, it cannot be deleted and the icon will be greyed out.</td>
</tr>
</tbody>
</table>
Next, you must define the evaluation rank rules that apply to each of the generation groups in this group, as described in Step 4.

**Step 3: Time Frame and Evaluation Rank Rules**

The next screen in this setup is the **Generation Rank Rules Use** page:

Here you will link Time Frame generation rules (one or more Time Frame generation dates) to rank rules.

The rank rules represent the evaluation actions between evaluator ranks and subject ranks (if applicable). This will inform E*Value which evaluations should be generated and to which users for a particular generation date.
1. **Generation Rule Group and Rule:** Select the generation rule group from the drop-down menu. The drop-down menu will populate with the available Time Frame generation rules based on the rule selected in Step 1. Select the Time Frame generation rule for which you wish to link evaluations. Select **List** to display all of the evaluation linkages available by rank.

2. For each rank, put a check mark in the box for the evaluation(s) that you would like to be associated with this generation rule. Select the **Update** button when you are done. In this way you could, for example, have a student complete Evaluation X for an
educator in the middle of a rotation. Meanwhile, the educator would not complete Evaluation Y for the student until the next generation date.

3. In Use: An evaluation type, or module, can only be assigned to one generation date per Generation Rule Group. Once it is assigned to a Rule within the Group, it will say ‘In Use’ in subsequent generation rules.

4. Once you have made all of your selections, click the Update button.

Finally, you can link the Multi-generation Group to Time Frames as described in the next section.

**Step 4: Link Multi-generation Dates to a Time Frame**

You may now create the Time Frames in which you will schedule users. You may use the navigation bar to quickly return to the main Time Frames screen:

Label and define the dates for the new Time Frame, then apply the Multiple-Generation Group you created to the Evaluation Generation Dates field for each Time Frame that will use the rules you just defined.

Note that each of the generation rules for the group will display based on the Begin and End dates, and the Generation Date rule selected, to the right side of the screen.

You may now use this Time Frame for scheduling. Evaluations will generate based on the Evaluation Types selected for each rule included in the group.

**Sharing Time Frames Created by Enterprise-level Program**

Time Frames can be created by your institution’s enterprise-level program - such as a School of Medicine office - and then shared across programs to create consistency across programs. You may find this useful if you are using E*Value’s Schedule Optimization functionality.
From within the enterprise-level program, create the necessary Time Frames as described above. From the table summarizing Time Frames, you will have an additional link in the **Action** column labeled **Replicate**. Use this link as described below to share your Time Frame:

1. Select the **Replicate** link for the Time Frame to be shared. The **Item Details** window will display, listing your institution's child programs.

2. Use the check boxes to indicate which programs should use this Time Frame. You may check the boxes individually or use the **Select** and **Unselect All** buttons as necessary.

3. Once the programs are identified, select the **Submit** button. You will be prompted by the following dialogue box to confirm your selections.
4. Verify your selections. Click the Yes button to continue.

**Note:** Time Frames will not be duplicated into programs where they already exist.

5. This portion of the dialogue box lists programs that the Time Frame was applied to successfully.

6. This portion of the dialogue box lists any programs for which the Time Frame was not applied because it already existed in that program.

7. Select OK to complete the task.
Programs are not be able to change the start and end dates associated with Time Frames that were created and shared by an enterprise-level program. By selecting the Limited Edit link, the program may modify the Evaluation Generation and Document Notification Dates only. They may still create and modify additional program-specific Time Frames.

<table>
<thead>
<tr>
<th>Time Frame</th>
<th>Start Date</th>
<th>End Date</th>
<th>Days</th>
<th>Eval Generation Date(s)</th>
<th>Doc Notification Date</th>
<th>Status</th>
<th>Action</th>
</tr>
</thead>
</table>

You may make changes to a schedule up until 11 P.M. CST of a Time Frame's generation date. At 11 P.M. CST each night, E*Value searches to determine if any Time Frames are scheduled to have evaluations generated. If it finds any, it sends out the evaluation notices for that course.
Session:  
Scheduling Users and Generating Evaluations

Schedule Teams Using team scheduling, you can schedule trainees for the same activity during the same Time Frame, and yet have them evaluated by different educators. To do this, you will use the Teams tool to create teams for the activity. Then, using the Add/Edit Schedules tool, you can schedule by team into that activity and Time Frame. The trainees and educators who will evaluate each other should be included in the same team. You can create as many teams as necessary. See Team Scheduling for more information. Please note that activities created under the "Conference" type cannot be used for team scheduling.

To add a team to an activity, follow the steps below:

1. All teams are associated with an activity; select one to begin.

2. Activities: Ambulatory Care

3. Any existing teams associated with the activity will be displayed below.

4. To add a new team associated with this activity, enter the name in the "Create a Team" box and click the button.

5. To edit the name of a team, select it, change the name in the "Change Team Name" box and click the button.

6. To delete a team, select it and click the "Delete Team" button. Only unused teams may be deleted.

7. Multiple teams may be created simultaneously by entering the number of new teams desired in the Quick Create Teams box and clicking the "Generate Teams" button. To create 40 teams, for example, enter 20, click Generate Teams, and then enter another 20. Once you click Generate Teams for the second time, you will have 40 teams.

Note: Certain terms that appear on this screen can be translated for your program and therefore may not match the image above.
1. **Rotations:** Select the activity for which you would like to schedule by teams. When you using scheduling users with the Add/Edit Schedules tool for the selected activity, you will be prompted to indicate which team the users should be scheduled into.

2. **Create a Team:** Enter a Name and Description then select the Add a Team button. The team will be added to the Existing Teams list.

3. **Change Team Name:** To change the name of an existing team, highlight the team name from the list and update the information in the Name and Description fields. Save changes by selecting the Rename button.

4. **Quick Create Teams:** As an alternative to creating teams individually, you may enter the number of teams you would like created in the Quick Create Teams field and select the Generate Teams button. The teams will populate in the Existing Teams list as Team 01, Team 02, etc.

5. To delete an existing team, highlight the team name from the list and select the Delete Team button.

Once your teams have been defined you can go to the Add/Edit Schedules tool to schedule users into teams.

**Default Educators** tool can be used if an educator or group of educators consistently teach the same activity. This tool allows you to assign the educator to the activity. That way, when a trainee is scheduled into the activity, the educator will automatically be assigned with them.

**Important:** Default Educators can be used in conjunction with E*Value’s Schedule Optimization functionality. Default Educators should be set up before the optimized schedule is committed to E*Value. If they were not entered prior to committing the schedule, contact your Client Service Consultant for assistance.

To assign an educator to an activity, use the steps described below:
Note: Certain terms that appear on this screen can be translated for your program and may not match the image above.

1. Rotations: Select the activities to be assigned from the drop-down menu.

2. Filters: If necessary, you can use the Rank, Role, Last Name, Status and People Group filters to narrow your list of educators. Select the filters you want applied and click the Refresh Available Users button. The Available Educators list will refresh.

3. Available Educators: Select the Educator’s name from this list.

4. Evaluation Action: Select an action from the drop-down menu.

5. Once you have selected an Educator and an evaluation action, select the Add button to assign the Educator to the activity.

6. To update the Evaluation Action needed, highlight the name in the Assigned Educators list and change the action indicated in the Evaluation Action drop-down menu. A pop-up dialogue box will ask you to confirm the change. Select OK to continue.

Create and Edit Evaluations. The Edit Evaluations tool can be used to enter and modify standard evaluation forms. Evaluation forms are typically added to your program at the time it implements the use of E*Value, but they may be added or modified as needed at any time. If you have evaluation forms that require special formatting or calculations, your Client Service Consultant can create those for you, and they may always assist in configuring your program’s evaluation setup.
However, some programs may wish to manage their own evaluation forms. If so, your Client Service Consultant must grant one or more Role(s) in your program the ability to create and edit evaluation forms using the **Edit Evaluations** tool. This ability is generally assigned to an Evaluation Editor Role; this Role is also typically assigned the **Link Evals to Rotations** menu item.

**Link Evals to Activities/Rotations/Courses**

Use the **Link Evals to Rotations** tool to modify the evaluation form* linked to an activity or group of activities. Generally, evaluation forms are either linked when they are created, using the **Edit Evaluations** tool, or when the Activity that will be scheduled is created, using the **Rotations** tool. If you need to modify the forms linked to an activity at any other time, use the Link Evals to Rotations tool.

***To modify the evaluation type linked to an activity, you must contact your Client Services Consultant.

**Note:** E*Value Client Service Consultants can configure your program’s evaluation setup. However, some programs may wish to manage their own evaluation forms. If so, your Client Service Consultant must configure grant one or more Role(s) in your program the ability link evaluations to Rotations. This ability is generally assigned to an Evaluation Editor Role; this Role is also generally assigned the **Edit Evaluations** and **Link Evals to Rotations** menu items.

**Filter Activity/Evaluation Links**

Whether you want to link or unlink evaluations/activities, begin by filtering for the Activity, as described below:

1. **Activity Group:** You may filter the list of activities by selecting a group from the drop-down menu. The Activity drop-down menu will populate with activities that are part of that group.

2. **Activity:** Select an activity from the drop-down menu.
3. **Evaluation Type:** You may select an evaluation type from the list, or select multiple types using the Shift, Ctrl and Apple keys, if you want to limit the list of evaluations that will be available for linking.

4. Select the **Next** button to continue. The screen will refresh with a list of the current evaluation/activity links that meet your criteria.

<table>
<thead>
<tr>
<th>Evaluation Type/Activity</th>
<th>Medical Student of Rotation</th>
<th>Rotation</th>
<th>Self Evaluation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ambulatory Care</td>
<td>71896</td>
<td>49425</td>
<td>63508</td>
</tr>
<tr>
<td>Anesthesiology</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cardiovascular Disease</td>
<td>71896</td>
<td>49425</td>
<td>63508</td>
</tr>
<tr>
<td>Clinical Skills</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dermatology</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Emergency Medicine</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Immunology</td>
<td>71895</td>
<td></td>
<td>66534</td>
</tr>
<tr>
<td>Internal Medicine</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

To view an evaluation currently linked to an activity, click on the form number. The evaluation will open in a separate window.

Click on the name of an activity to proceed with linking/unlinking. Clicking on the name will open the **Link Evaluations to Rotations Wizard**. The name of the activity will appear to the right and all of the evaluation types you selected will appear across the top, as shown in the example below. You may use this wizard to both link and unlink evaluations:

**Link Evaluation to Activity**

### Link Evaluations to Activities Wizard - Link Evaluations

![Image of Link Evaluations to Activities Wizard]

1. Select an evaluation form number from the drop-down menu. The drop down fills with question sets that are being used by other activities in your program. To see what that evaluation will look like to your users, select the **Preview** button.

**Note:** If none of the available options are appropriate for the activity, you can select the "Not Available" option. This will generate an email to your Client Service Consultant who will contact you regarding the new evaluation form you would like to create.

2. When you have made with your selections, click the **Next** button.
3. The modified activity/evaluation links will display, with the activity being updated highlighted. You may select any of the evaluation form numbers to preview the evaluation. To confirm your selections, click the **Update** button. If necessary, you may click the activity name or the **Back** button to revise your selections.

<table>
<thead>
<tr>
<th>Evaluation Type/Activity</th>
<th>Medical Student of Rotation</th>
<th>Rotation</th>
<th>Self Evaluation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ambulatory Care</td>
<td>71896</td>
<td>49425</td>
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<tr>
<td>Anesthesiology</td>
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<td>Clinical Skills</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dermatology</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Emergency Medicine</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Immunology</td>
<td>71896</td>
<td></td>
<td>66534</td>
</tr>
<tr>
<td>Internal Medicine</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

3. After clicking **Update**, you will be given another opportunity to review the evaluation forms you have selected. You may click on the evaluation form numbers to preview the selections. If you are satisfied with the links, click the **Finish** button.

The screen will refresh with a table summarizing the history of the evaluation setup changes made to your program. Column headers in blue can be used to sort the table. If you have any questions or concerns about changes that were made, please contact your Client Service Consultant.

The same process may be used to unlink activities/evaluations, as described below:

**Unlink Evaluation from Activity**

The Link Evaluations to Rotations Wizard may also be used to remove existing links between activities and evaluations.
1. From the select box for the Evaluation Type that you wish to unlink, select the “Not Available” option.

2. Select the **Next** button to continue.

Review the activity and evaluation type to be unlinked:

<table>
<thead>
<tr>
<th>Evaluation Type/Activity</th>
<th>Self Evaluation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anesthesiology</td>
<td>Not Available</td>
</tr>
</tbody>
</table>

3. Select the **Update** button to continue. You will be given another opportunity to review your selection:

<table>
<thead>
<tr>
<th>Self Evaluation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anesthesiology</td>
</tr>
<tr>
<td>Not Available</td>
</tr>
</tbody>
</table>

4. Select the **Finish** button to complete the task. Your Client Service Consultant will receive a notification that the evaluation was removed and will contact you to determine if a new evaluation is needed instead.

The screen will refresh with a table summarizing the history of the evaluation setup changes made to your program. Column headers in blue can be used to sort the table. If you have any questions or concerns about changes that were made, please contact your Client Service Consultant.
View Form Setup  E*Value assigns evaluations based on the Rotations on an individual's schedule and the evaluations linked to those Rotations for his/her Rank. The View Form Setup tool can be used to review the Evaluation Types attached to Rotations and print blank Evaluation forms.

Step 1: What program(s) use the evaluation forms you would like to review or print?
- **Programs**: Parent Administrator Roles can review evaluation forms from any of the programs they have access to. If applicable, select the program or program groups that you would like to review.

Step 2: What Activity or Rotations use the evaluation forms you would like to review or print?
- **Activity**: Evaluations are attached to Rotations and generate based on an individual's schedule. Select the Rotations for which you would like to review or print Evaluations. You may filter the list of Rotations by Activity Group, name or status. Alternatively, you can leave the select list at the default, All Rotations.

Step 3: Who or what is evaluated by the evaluation form you would like to review or print?
- **Evaluation Type**: Evaluation forms in E*Value are classified by an Evaluation Type that typically describes who or what is being evaluated. Evaluation Types are typically added to your program by your Client Service Consultant during E*Value implementation, and then as needed at the request of your Program Administrators. Use this multi-select list to select the types that describe the forms to be reviewed or printed.

Step 4: What format would you like to use to review or print evaluations?
- **Format Option**: Indicate if the report should generate in HTML or Excel format.

Information contained in this guide is confidential and proprietary
An example of the HTML format for a single program is shown below.

### Survey Setup Preview

To display and/or print a blank evaluation for your review, just click on the link below. After the evaluation appears, use your browser’s print button to print a hardcopy of the form.

If an evaluation form is attached to an Activity and Evaluation Type, then the 5-digit form ID will display as a hyper-link. If no form is linked, an N/A will display. Evaluations with Weighted Groups will be highlighted pink.
Activity-based Scheduling. 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 Activity 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 activity. 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.

Filter Schedules

Begin by filtering the scheduling screen by Users, Time Frames, Rotations, and if applicable, Sites. You may also filter for a specific date range.

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

Note: If you are using Schedule Verification, you will not have the option to include inactive user - inactive users will always be included, so as to avoid verifying hidden inactive users.

Once you have filtered the schedules, click the View Schedule button to begin scheduling. The available scheduling methods are described below.
Schedule Types - Overview

Basic Scheduling

This is used for block scheduling where a user participates in one activity for a set period of time. No additional configuration of your program is needed to use this method.

Team Scheduling

Team scheduling is similar to basic scheduling, but it also allows you to indicate, for example, that although two trainees are doing the same activity at the same time they should be evaluated by two different educators. To accomplish this, schedule one educator and one trainee into a team and the other trainee and educator into another team. Some activities can be ‘teamed’ and others not. Before using this method, teams must be created for the activity to be scheduled using the Schedule Teams tool located under the Rotations menu. Contact your Client Service Consultant if you do not have the Schedule Teams menu item available.

Shift Scheduling

Shift Scheduling allows you to build schedules that incorporate the various shifts worked during a given activity and Time Frame. This scheduling method is useful for capturing a detailed account of trainee time spent at training sites during their scheduled activities. Programs that use the E*GME finance tool will find this method especially useful for calculating reimbursements. With shift scheduling you can indicate that a trainee was in clinic for their Tuesday and Thursday afternoon shifts, for example, but doing their general work rotation for the remaining shifts of the week. You can also use Shift Scheduling to document call schedules. If you wish to use Shift Scheduling, please contact your Client Service Consultant to grant you the appropriate access.

Cross-Program Scheduling

Cross-program Scheduling allows you to add your trainees into the schedule of another program. For example, if you are a Family Medicine program and your trainee is doing a rotation in OB you can simply access the OB schedule and enter in your trainee. Prior to being able to do this scheduling OB needs to have agreed that other programs can enter trainees into their schedule. This will need to be set up in advance. Please contact your Client Service Consultant if you would like to use this method.

Schedule by Site

Site scheduling allows you to schedule your trainees into one activity that happens at various sites. This is the same as the current activity view of Add/Edit Schedules, but the schedule allows you to create evaluation assignments based on the list of sites linked to the program. Evaluations will only generate for users who have been scheduled for the same activity, Time Frame and site. For example, the individuals who have been scheduled for Ambulatory Care – Site 1, should evaluate each other, but should not evaluate the individuals at Ambulatory Care – Site 2. Please contact your Client Service Consultant if you would like to use this method.
Shift Scheduling allows you to build schedules that incorporate the various shifts worked during a given Activity and Time Frame. Use this scheduling method to:

- Schedule multiple training sites during a single Activity and Time Frame
- Specify the Start and End Times for the various shifts scheduled
- Capture clinic and call schedules
- Calculate residency program reimbursements based on the categories assigned to each shift

In order for the Shift Scheduling form to display during scheduling, the activity being scheduled must be set up to allow Shift Scheduling. Once you have flagged the activity for shifts using the Rotations tool, you can use the Add/Edit Schedules tool to schedule users.

The flow diagram below follows the basic steps required for Shift Scheduling:
Program Setup and Shift Defaults

Tip: You can set up default shift information. Defaults are not required, but they are useful if a shift is consistently scheduled at the same time and on the same days of the week. Setting up defaults can save a lot of time spent scheduling. See the Shift Defaults tool help page for more information. This tool can also be used to manage and restrict the Categories assigned to a shift. Categories are primarily used by E*gme clients to track reimbursement information.

If shifts defaults have been created, they will populate and display in the Add/Edit Schedules window based on your program setup. There are 2 considerations for your program setup:

1. Does your program use the E*gme reimbursement tool?

2. Does your program use Site Scheduling? If your program uses Site Scheduling, then the Select site field displays on the Add/Edit Schedules window.

E*gme clients cannot use Site Scheduling; therefore, there are 3 possible program setups allowed:

<table>
<thead>
<tr>
<th>E*gme?</th>
<th>Site Scheduling?</th>
<th>Shift Defaults</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 No</td>
<td>No</td>
<td>To use defaults, you must click into the shift scheduling calendar and select the Site. The select list includes all sites for your program. If you click the Add Schedule Entry button without clicking into the shift calendar, the default information will not populate and shifts will automatically be scheduled at the Primary Training Site set up for the activity. The Primary Training Site is set using the Rotations tool.</td>
</tr>
<tr>
<td>2 No</td>
<td>Yes</td>
<td>To use defaults, select the default Site in the scheduling window. The shift form will populate with the default information. If you are satisfied with the default information, click the Add Schedule Entry button to accept the default info the length of the use’s participation dates. You may add additional shifts, if necessary, by clicking into the scheduling calendar. Note: You may set up more than one default for an Activity. To access multiple defaults from the scheduling window, click the shift icon to open the shift calendar. Default information will populate based on the Site selected.</td>
</tr>
<tr>
<td>3 Yes</td>
<td>No</td>
<td>If a default has been set up for the Activity’s Primary Training Site, then the shift form will automatically display the default information when you open the scheduling window. However, you must click into the shift scheduling calendar to accept these default shifts, add more shifts, or make any</td>
</tr>
</tbody>
</table>
### Scheduling Shifts

Once you have filtered your schedules and selected a time frame, the Add/Edit Schedules window will refresh with options for creating your shift schedule.

#### Schedule for Clinical Skills:

<table>
<thead>
<tr>
<th>Select a time frame:</th>
<th>February 2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Filter User list (Optional):</td>
<td>All Users Group</td>
</tr>
<tr>
<td>Filter by Last Name (Optional):</td>
<td>Last Name Filter:</td>
</tr>
<tr>
<td>Select a user:</td>
<td>Parker, Mary Stuart - Preceptor</td>
</tr>
<tr>
<td>Select site:</td>
<td>Site</td>
</tr>
<tr>
<td>Participation Start &amp; End Dates:</td>
<td>02/01/2011 to 02/28/2011</td>
</tr>
<tr>
<td>Shift Scheduling:</td>
<td>Start Time: 8:00 am, End Time: 12:45 pm</td>
</tr>
<tr>
<td>Evaluation Action:</td>
<td>Add Schedule Entry</td>
</tr>
<tr>
<td>Change Tracking:</td>
<td></td>
</tr>
</tbody>
</table>

1. **Select a user:** Select the users you wish to schedule. You may select multiple users by holding down the Shift, Ctrl or Apple keys. If a user has already been scheduled for the

Additional changes, if necessary. Then, return to the main scheduling window and click **Add Schedule Entry** to finalize the shifts.

**Note:** E*Gme clients are limited to one default per Activity. It is recommended that the default be set up for the shift that occurs most frequently.
activity and Time Frame selected, then his/her name will be grayed out and not available for selection. You may filter the list of available users by People Group, Role, Specialty or Rank, if necessary. You may also filter for users by last name.

2. **Select site(s):** Select a site for the activity. Generally, you will select the Site at which the majority of the shifts will take place. Use the plus icon to add the site. If Shift Defaults have been set for the selected Activity and Site, the Shift Scheduling box will populate with the defaults once the default site is added.

**Note:** Sites are an optional scheduling field that your program may or may not be using. If your program does not schedule sites, this field will not display. Additionally, the ability to select multiple sites is configured by program. Selecting multiple sites will disable the Shift Scheduling box - you must click the shift icon to open a window for creating shifts and specifying the applicable sites for each.

3. **Participation Start & End Dates:** Shifts will only be created for dates that fall within the user’s participation date range. Participation dates automatically default to the Time Frame start and end dates. If the user(s) should only be scheduled for a portion of this time, then you may modify their participation dates here.

4. **Shift Scheduling:** Use the Shift Scheduling box to describe the majority of the shifts for this Activity/Time Frame. The fields may pre-populate based on Shift Defaults, if they exist. Your ability to modify the category may be restricted based on the default setup. If all of the necessary shifts can be described within this form and your program does not use E*gm, then no additional shift setup is required. You can click the Add Schedule Entry button and shifts will be created for all of the days selected that fall within the user’s Participation Dates. However, if you use E*gm, or if additional shifts are needed that will not use the default selections, click the Shift icon to open the Shift Calendar window described below.
a. **Start and End Time:** The start and end time will default to the times selected on the previous screen. You may change these times as necessary before clicking the Select Shifts button to apply the times to the highlighted dates.

b. **Site:** Select the specific site where the shift will take place. This location will be saved for all highlighted dates once the Select Shifts button is clicked. If your program uses E*gme, then the select list will be limited to sites that have been linked to the activity using the Locations & Hours tool. If no sites have been linked, then it will be limited to the Primary Training Site selected for that activity. The Primary Training Site is set using the Rotations tool.

c. **Category:** Select the category that describes the shift. If Shift Defaults exist for the activity and site, your ability to modify the category may be restricted. See Shift Defaults for more information.

d. **Select:** You may use the calendar to select the specific dates on which a shift occurs. If you selected default days on the previous screen, all applicable days that fall within a user’s participation dates for that Time Frame will be automatically highlighted. You may click on a highlighted day to remove a selection.

e. Click the Select Shifts button to save your shifts. To schedule additional shifts, you can modify the default information and select the additional dates. The new shifts will be summarized in the bottom portion of the window.
f. Once you have created your necessary shifts, click the **Continue** button. If the new shifts overlap with a user’s existing schedule, the **Shifts Overlap** window will display and prompt you to correct the issues; see Resolving Shift Overlaps below for more information.

5. **Evaluation Action:** Choose the evaluation action. This indicates whether the scheduled users will do evaluations, be evaluated or both. If you do not wish to have evaluations generated, but simply want to record that a particular trainee participated in this activity for this Time Frame, then select the evaluation action of ‘Neither’.

6. **Change Tracking:** Your program may choose fields that should be tracked when schedule changes are made. You can expand those fields, if applicable, by clicking the +/- icon.

7. Select the **Add Schedule Entry** button to submit your schedule.

The grid in the bottom half of the window will update to show the schedule entries.

<table>
<thead>
<tr>
<th>Jan 2011 Eval Gen Date(s)</th>
<th>Feb 2011 Eval Gen Date(s)</th>
<th>Mar 2011 Eval Gen Date(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/01/2011 to 01/31/2011</td>
<td>02/01/2011 to 02/28/2011</td>
<td>03/01/2011 to 03/31/2011</td>
</tr>
</tbody>
</table>

**Holt Blvd Clinic**

**Cambell, Noah**

Jan 01-Jan 31 Both Does/Is

![Shifts Scheduled](image)

The scheduled user will display in the selected Time Frame. The 📅 icon denotes that the user is scheduled for shifts.

Note that you can delete or edit an entry from this grid. Click **Delete** to remove a single user. Click **Delete All** to remove all users. Click the **Edit** link to open up the user’s schedule entry for editing.

**Resolving Shift Overlaps**

If you attempt to create shifts that overlap with a user’s existing schedule, the **Overlapping Shifts** window will display and prompt you to correct the issues. The available options will depend on whether or not your program uses E*Value’s financial reimbursement tool E*gme.

E*gme programs **must resolve** any schedule overlaps before shifts can be saved:
Programs that do not use E*gme will have an additional option to allow overlaps:

<table>
<thead>
<tr>
<th>User</th>
<th>Shift</th>
<th>OverLapping Shift</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mali, Ashok</td>
<td>02/16/2011 - 08:00 AM to 05:00 PM</td>
<td>A:*Value Program - Clinical Skills 02/16/2011 - 08:00 AM to 05:00 PM</td>
</tr>
<tr>
<td>Mali, Ashok</td>
<td>02/18/2011 - 08:00 AM to 05:00 PM</td>
<td>A:*Value Program - Clinical Skills 02/18/2011 - 08:00 AM to 05:00 PM</td>
</tr>
<tr>
<td>Mali, Ashok</td>
<td>02/21/2011 - 08:00 AM to 05:00 PM</td>
<td>A:*Value Program - Clinical Skills 02/21/2011 - 08:00 AM to 05:00 PM</td>
</tr>
</tbody>
</table>

Click the Allow Overlaps button to disregard the overlapping schedule entries.

Click the icon to modify the shift to be added so that it does not overlap with the existing shift. Alternatively, you can delete the shift using the icon.
Editing Shifts

You can edit shifts after they have been scheduled. You will not be able to use the shift defaults form; instead, click the Shifts icon to edit shifts. If you edit a user's participation dates, any already-scheduled shifts that fall outside of the new participation dates will be deleted.

1. **Participation Start & End Dates:** If you edit an already-scheduled user's participation dates, any already-scheduled shifts that fall outside of the new date range will be deleted.

2. **Shift Scheduling:** When editing shifts for an already-scheduled user, the shift defaults form will be disabled. You can click on the shift icon to open the shift calendar and edit shifts.

3. If you shorten a user's participation dates, any already-scheduled shifts that fall outside of the new date range will be deleted. You will receive the warning message shown above. Click OK to continue.
The Evaluations component is the cornerstone of your program's evaluation process, containing everything needed to manage evaluation forms and evaluator data, including:

- Create and edit evaluation forms and question groups
- Link existing forms to activities
- Manage and print completed forms
- Review evaluation reports and data for trainees, educators, activities and sites

Manage Completed Evaluations

Adjustments

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.
Retrieving Pending Evaluations

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

---

Information contained in this guide is confidential and proprietary
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.

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:

---

<table>
<thead>
<tr>
<th>Id</th>
<th>Name</th>
<th>Time Frame</th>
<th>Request Date</th>
<th>Activity</th>
<th>Type</th>
<th>Subject</th>
<th>Status</th>
<th>Re-Open</th>
</tr>
</thead>
<tbody>
<tr>
<td>142296</td>
<td>John Burns</td>
<td>Boc 1</td>
<td>07/10/2009</td>
<td>Brain &amp; Behavior</td>
<td>Course</td>
<td>Brain &amp; Behavior</td>
<td>Completed</td>
<td></td>
</tr>
</tbody>
</table>

**Message to John Burns why 142296 was re-assigned/re-opened:** Corrections made per email from trainee.
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.

---

**Review/Release**

E*Value includes the ability to direct completed evaluations into a **Review/Release** queue before they are released to the reporting pool. The report will display any comments included on the evaluation, as well as links to the full evaluation - depending on your program's Anonymity Settings. Programs can specify which Evaluation Types should be reviewed prior to release. This feature is often used as a tool to educate trainees on how to give appropriate feedback. It is also used by programs that have a requirement that their Program Director reviews all evaluations. This is one way to document that all evaluations were indeed reviewed.

Please note, certain information will be suppressed, depending on a program's anonymity settings. There are two filter options available for this tool. The Standard Filters include the ability to search for evaluations by Evaluator Rank and Rotations. This is the default filter that will be assigned. Programs may optionally request an Expanded Filtering page; however, programs should be aware that the expanded filters may allow a user to drill down to identify the evaluation subject, thereby bypassing anonymity settings.

**Note:** Although evaluations held in the Review/Release queue will not display in reports until they are released, once they are released, the Completed Date recorded for the evaluation will still be the date that the evaluator submitted the completed evaluation.

**Standard Filters**

Begin by filtering for the evaluation(s) to be reviewed:

1. **Evaluator Rank:** Filter by the rank of the evaluation evaluator, if needed.
2. **Activity:** Select the activity for the evaluations to be reviewed. You may filter the list by **Activity Group**, if needed.

3. **Include evaluations on hold:** Select whether you would like to review only new evaluations or also those that are currently on hold.

4. **Default Action:** Indicate whether the default selection on the subsequent screen should be to release or to hold all evaluations.

Click **Next** to review the evaluations included.

See below for an example of the review page.

---

**Expanded Filters**

### Step 1: What is the date range of the evaluations to be reviewed for release?

- **Start Date and End Date:** The date range will default to the length of the current academic school year. You may modify this date range. Be certain to specify the event that 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 activity linked to the evaluation(s) started (Time Frame Start Date) or the date the activity linked to the evaluation(s) ended (Time Frame End Date)?

### Step 2: Should the report results be limited to evaluations completed for specific Sites?

You can search for evaluations completed based on the Site on the evaluator's schedule.

- **Site:** You may select a site from the drop-down list. You may also filter the list of sites included in this list by name or keyword using the Site Filter.

### Step 3: Should the report results be limited to evaluations completed for specific Rotations?
• **Activity:** You may select an activity from the drop-down list. You may also filter the list by **Activity Group**, name or keyword using the Activity Filter.

**Step 4: Should the report results be limited to specific Evaluation Types?**

• **Evaluation Type:** Programs can specify which Evaluation Types should go through Review/Release prior to entering the reporting pool of data. All Evaluation Types in your program that have been flagged for Review/Release will display here. You may contact your Client Service Consultant if there are additional Evaluation Types that should be included. You may limit the results to the type or types selected here.

**Step 5: Should the report results be limited to specific Evaluators?**

• **Evaluator Rank:** You may limit the evaluations to be reviewed by the rank of the evaluator.

• **People Groups:** You may limit the evaluations to be reviewed to those completed by evaluators that belong to a particular **People Group**.

• **Evaluators:** You may review evaluation completed by a specific evaluator using the select list. This list can be filtered by Last Name, if necessary.

**Step 6: What default action should be selected for the evaluations included? Should the report include evaluations that have been put on hold?**

• **Default Action:** On the next screen, radio buttons will be used to indicate if the evaluations should be released, re-opened or held. You can select a default action here to apply to all that you will be able to modify as necessary for individual evaluations.

• **Include evaluations on hold:** This tool can also be used to place evaluations on hold. You can indicate whether or not you would like to review evaluations that are on hold.

Click **Next** to review the evaluations included.

An example is shown below.

---

**Example**

Regardless of the filter used, the report will display the same. Evaluations will be grouped by the Activity and Time Frame for which they generated.
1. **Activity**: Evaluations will be grouped by the Activity and Time Frame for which they generated. A reviewer's ability to see this information will depend on the Anonymity Settings for his/her role.

2. **Low Score**: Programs have the option of defining a low score threshold for scale-type questions based on the Evaluation Subject. For example, programs could specify that any question answered about a trainee that is below than 25% of the possible points is a low score. This column will flag any evaluations that contain low-score answers with a Yes.

3. **Release?**: Use the radio buttons in this column to indicate the action for the evaluation. The selection will default to the Default Action selected on the filter screen. If you choose to re-open an evaluation, you will be prompted to email the reason the evaluator. The evaluation will return to the user's Pending Evaluations list and all of the evaluator's initial responses will be saved.
4. Evaluators may be suppressed, depending on a program's **Anonymity Settings**.

5. When available, you can click the evaluation subject to open the full evaluation in a pop-up window.

6. Click **Update** to save the actions specified in the **Release?** column.

---

**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:
1. **Start and End Dates**: Enter a time frame for the evaluation.

2. **Site**: Select a site for the evaluation.

3. **Activity Group**: You can filter by Activity Group using the drop-down menu.

4. **Activity**: You can filter by Activity using the drop-down menu provided. You can use the Activity Filter text field and button to narrow the list of activities included in the Activity 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.

---

**Aged Evaluations**

Evaluations are generally intended to gather feedback on a recent activity or event. If evaluations are not completed in a timely fashion, the feedback that an evaluator can provide may no longer be applicable or useful. Additionally, at the end of an academic year, programs may wish to remove evaluations that were not completed. The tools available in the Manage Aged Evaluations menu item can be used to review and delete evaluations, as well as set automatic evaluation expiration and deletion rules. Additionally, these tools can be used to review and re-open expired evaluations.

**Set Up Evaluation Expiration Rules**

Automatic expiration and deletion rules can be created by Evaluation Type to remove evaluations after a set period of time. Once an evaluation has expired, it will no longer display in an evaluator’s queue of evaluations. Additionally, if an evaluator has suspended an evaluation that expires, it will no longer be included in the list of suspended evaluations available from the Adjustments tool.

If necessary, an Administrator can re-open expired evaluations. Once an evaluation has expired, it will be deleted from E*Value per the rule parameters. Deleted evaluations cannot be retrieved or re-opened.
**View/Update Expired Evaluations**

Evaluations that have expired per your program’s **Expiration Rules** can be reviewed, and if necessary, re-opened. Evaluations that are re-opened will still be subject to any active expiration rules, but re-opening an evaluation will re-set the generation date so that the new expiration date is adjusted accordingly.

**View/Delete Aged Evaluations**

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, activity, evaluation type and/or status.

---

**Question Groups**

Evaluation questions can be grouped together for reporting purposes, even if they appear on different evaluation forms and in different programs.

The functionality was originally developed to allow residency programs to group questions related to ACGME core competencies. For example, if your program has activity-specific evaluation forms, you can create a group of questions called Medical Knowledge. You can then run a report for a particular trainee to see how he or she did on Medical Knowledge across activities.

Likewise, if certain evaluation module(s) are used in multiple programs at your institution, then you can create a Question Group in a parent-level program (such as a GME Office or School of Medicine) and generate reports on these questions across programs. Clients have used this, for example, to generate reports on specific questions included on an Exit Survey used throughout their institution. In order to create the Question Group, the evaluation module must also be linked to the parent-level program. Contact your Client Service Consultant if you have questions about creating a Question Group that can be used to generate reports across multiple programs.

---

**Groups**

Question Groups are typically used to identify questions related to a specific topic – even when those questions appear on different evaluations. You may then filter by Question Group and Questions on various performance reports. This is useful, for example, for tracking evaluation questions related to your program’s core competencies.

Question Groups can also be linked to a Curriculum Element Group. By linking a Question Group to an Element Group, you can measure a trainee’s performance average for questions that address the elements included in the element group (see the Element/Person Crosstab report documentation for more information). **If you wish to link Question and Element Groups, then you**

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**should not use this tool to create the group label.** Instead, use the Create Element Groups tool and check the box to also use it as a Question Group.

Begin by labeling the Question Group, as described below:

1. **Group Description:** Enter a descriptive label for the questions to be grouped in the text field provided.

2. **Group Type:** Select a question group type from the drop-down menu. This group type will tell E*Value what reports will have access to information on the question group. The options include:
   1. **Trainee Question Group** – Available on most reports related to trainee Performance, Rankings and Evaluations.
   2. **Educator Question Group** – Available on most reports related to educator Performance and Rankings, as well as for the Trainee Bias report (located under the Miscellaneous Report menu).
   3. **Activity Question Group** – Available on most reports related to Activity Performance and Rankings.
   4. **Site Question Group** – Available on reports related to Site Performance and Rankings.

3. Select the **Add Group** button to finish creating the group label.

Once you have created the group, you can use the Group Questions tool to assign questions to the group.

---

**Add Questions to Groups**

Once you have created a **Question Group**, you can assign questions to the group using this tool. Please note, Question Groups are specific to Evaluation Type. In other words, evaluation questions about trainees can be grouped; evaluation questions about educators can be grouped, etc.
Assigning Questions to a Group

1. **Group Name:** Select the group to be used from the drop-down menu. See Question Groups for information on creating the group name. The Available Questions list will populate with questions used on evaluations that correspond to the Group Type used for the selected group (i.e. if the group type selected is "Trainee Question Group," then questions that appear on evaluations about trainees will be available in the list).

2. **Search:** You may filter the list of Available Questions. Indicate if you would like the list to include Historical (old answers) questions, Currently Used Questions only, or both. Select the Refresh Question List button to re-populate the Available Questions list.

3. **Filter by:** To filter the Available Questions list by question text or ID, enter all or part of the text/ID in the text field provided, indicate the filter type and select the Refresh Question List button to re-populate the list.

4. **Available Questions:** Questions used by your program and matching your filter criteria will appear in the list. The Available Questions list will sort on Topic by default; use the Sort By radio buttons to sort by question ID instead.

   **Tip:** To review the full question topic and text, click on the question from this list. The question Topic and Text will appear below the form.

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5. Highlight the question(s) to be added to the group from the Available Questions list and select the Add button. You can multi-select from this list using the Ctrl, Shift or Apple keys. You can remove questions from the Selected Questions list by highlighting it and selecting the Remove button. Again, you can double-click on a question in this list to review its topic and text.

Using Question Groups across Programs

Question Groups can also be used to generate reports on a set of questions used by multiple programs at your institution.

Question Groups are based on a question ID, which in turn is linked to the Evaluation Form ID. These modules may be used by multiple activities within your program, and can even be used by multiple programs at your institution.

When the same modules (and therefore, the same question IDs) are used by multiple programs within an institution, then Parent Administrator Roles can generate reports using a Question Group created in the parent-level program to pull information from across programs.

If you would like to use this capability, then we would recommend ensuring that the same module is linked to the applicable programs. You may use the Survey Setup tool to review the evaluation module IDs linked to a program. Also ensure that it is linked to the parent-level program from which the report will be generated (for example, a GME Office or School of Medicine). Create the Question Group in the parent-level program. When you access the Performance Report that you would like to generate as a Parent Administrator, Program and Program Group filters will be included. From these filters, select the parent-level program that the Question Group was created in as well as the programs you would like included in the report. The Question Group filter will include all groups that exist in the selected programs; select the group created in the parent-level program. Populate the other filters as needed and generate the report to view performance across programs for those questions.

Remember, Question Groups are specific to an Evaluation Type, as are the Performance Reports. So, for example, if you create a Question Group with an Activity Type, then you would use the Activity Performance reports to view the questions included in that group. If you have any questions, please contact your Client Service Consultant.
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, Activity, 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 Comment 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.

**Grade Sheet**

The **Trainee Grade Sheet** report can be used to view grades assigned to trainees. Any scale-type question can be created as a Graded question.

**Grades**

The **Trainee Grades** report can be used to view grades assigned to trainees. Any scale-type question can be created as a Graded question.

**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).

**Question Groups**

The **Trainee Question Groups** report can be used to view aggregate performance data on questions completed **about a trainee** that are included in **Question Groups**. Question Groups can be used to group questions about trainees, regardless of the evaluation on which the question appears. Programs may find it useful, for example, to group questions related to the required core competencies.

**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 Rotations 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.

Performance Overview - Educator

Aggregate Performance

The Educator Performance report can be used to view aggregate data on evaluations completed about an educator. 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 Educator Performance reports to:

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

Bias

The Educator Bias report can be used to view the average score that an Educator answered about trainees in comparison to the overall average score received from all evaluators. A Percentage Difference is calculated between these two averages, where a negative score indicates the Educator tends to score trainees lower than others have rate the same group of subjects. The scores included can be filtered by evaluation completion Start and End Dates, Evaluation Type, and Question Group/Question.

Comments

The Educator Comments report can be used to view Comment and Short Answer-type questions entered about educators on completed evaluations. 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 the name of the evaluator who left the comment will depend on the Role viewing the report and your 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.
Performance by Type

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

- displaying evaluation data broken out by educator
- 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 **Educator Ranking** report can be used to compare the standing of educators based on standardized scores, scores converted to a percentage and actual score averages. Administrators and Directors can compare educators to one another; however educators will only be able to see their own ranking data. Comparisons between Educators will be most useful when the number of questions answered about each are roughly equivalent.

Educator Scores

The **Educator Scores** report can be used to view raw scores answered about a educator for a given question, across Rotations 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.

**Activity Reports**

Generate performance and comment reports for evaluations completed about activities; download raw scores and view completed evaluations. Access to data may be restricted based on your role, anonymity and program settings.

**Site Reports**

Generate performance and comment reports for evaluations completed about sites; download raw scores and view completed evaluations. Access to data may be restricted based on your role, anonymity and program settings.
Completion Compliance

The Compliance report can be used to review a percentage of the evaluations completed compared to those that were assigned. Links to completed evaluations may be included depending on the Anonymity Setup assigned to the Role generating the report. The report will also display usage statistics for individuals, including the number of times they have logged into E*Value and the data of last login. Shortcuts are included for quickly sending emails to non-compliant evaluators.

Generating the Report

See the guidance questions below for help building your report criteria.

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.
   
   Important: Any evaluations that generated during the dates entered here will be included in the report.
      - Program Group/Program: Parent Administrator Roles can filter the report by Program or Program Group.

Step 2: Which Compliance Rates should be included?
   - Compliance Rate: Indicate the Compliance threshold that should be included.

Step 3: Would you like to review compliance for a particular Site and/or Activity?
   - Site: You may filter the report by Site to limit results to evaluations completed for a particular site.
   - Activity Group/Activity: You may filter the report by Activity or Activity Group to limit results to evaluations completed for a particular activity.

Step 4: Would you like to review compliance for a particular Evaluation Type and/or Evaluator Rank?
   - Evaluation Type: You may filter by Evaluation Type(s) using this multi-select list. All Evaluations Types will be available from this list.
   - Evaluator Rank: You may filter the report to see the compliance rates for the Rank or Ranks selected here. The overall Rank compliance rate, as well as the individual data for the evaluators, will be included.

Step 5: Would you like to review compliance for a particular People Group, Role or Evaluator?
• People Groups: You may filter the report to see the compliance rate for individuals included in a People Group. The overall Group compliance rate, as well as the individual data for the evaluators, will be included.

• Role: You may filter the report to see the compliance rate for individuals with a particular Role. The overall Role compliance rate, as well as the individual data for the evaluators, will be included.

• Evaluators: The list of evaluators here will filter based on the selections above. You may also select an individual evaluator from the list.

**Step 6:** What format should be used to generate the report? How should the data be grouped?

• Format Option: You can generate the report either in HTML or Excel.

• Report By: Parent Administrator Roles will have an additional filter option for indicating how the data should be grouped.
  
  o By Evaluator: Details and totals will be grouped by Evaluator Name, regardless of the program in which evaluations generated or the evaluators' Home Program.
  
  o By Home Program of Evaluator: Details and totals will be grouped by the Evaluators' Home Programs. The Home Program can be found on the Biographic Information tab of a user's Biographic Data.
  
  o By Activity Program: Details and totals will be grouped by the Program containing the Activity that generated the evaluation.

Click Next to generate the report.

---

**Report Examples by Type**

Parent Administrator Roles can generate the report By Evaluator, By Home Program of Evaluator or By Activity Program. Administrator roles can generate the report By Evaluator. An example of each type is shown below.
### Compliance Threshold

**Threshold:** Less than or equal to 100%

**Role:** All Roles

**Time Period:** 08/09/2011 to 08/09/2011

**Report Date:** 08/09/2011

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<tr>
<th>Name</th>
<th>Email</th>
<th>Evaluations Assigned</th>
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<th>Evaluations Completed, Pending Review/Release</th>
<th>Evaluations Not Completed</th>
<th>Suspended and Deleted</th>
<th>Evaluations Suspended</th>
<th>% Complete</th>
<th>Times Logged On</th>
<th>Last Login</th>
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**Grand Totals**

- Evaluations Assigned: 73
- Evaluations Completed: 69
- Evaluations Completed, Pending Review/Release: 0
- Evaluations Not Completed: 0
- Evaluations Aged and Deleted: 0
- Suspended and Deleted: 4
- Evaluations Suspended: 0
- % Complete: 100.00
- Times Logged On: 289

### User Logins Who Have No Evaluation Assignments

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<th>Last Name</th>
<th>First Name</th>
<th>Login Count</th>
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<tbody>
<tr>
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</tr>
<tr>
<td>Doe</td>
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<tr>
<td>Stenbeck</td>
<td>John</td>
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<td>06/13/2011</td>
</tr>
<tr>
<td>Tonkinson</td>
<td>Michelle</td>
<td>23</td>
<td>09/09/2011</td>
</tr>
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</table>
Note 1: Individual Evaluator Reports

- Name: Click an evaluator's name to view his/her specific data. Depending on your Role's Anonymity Settings, you may be able to view evaluator data and/or have direct links to completed evaluations; otherwise, details will be suppressed.

- Email: An email link for the address recorded on the evaluator's E*Value profile will be included for quickly emailing evaluators.

Note 2: Evaluation Statistics Included
• Evaluations Assigned: Includes a count of the total number of evaluations that generated for the evaluator during the date range selected on the filter page. The Time Period can also be seen in the report header.

• Evaluations Completed: Out of the number of Evaluations Assigned, this column will display the number that have been completed. This does not include any evaluations that have been completed, but which are pending Review/Release.

• Evaluations Completed, Pending Review/Release: Programs have the option to require certain Evaluation Types to be held for Review/Release prior to displaying the data in Performance and Evaluation Reports. If the evaluator has completed any evaluations that are being held, the total number will display here. Evaluations that are pending Review/Release do not count toward or against the % Complete; the number here is subtracted from the Evaluations Assigned total when calculating % Complete.

• Evaluations Not Completed: Out of the number of Evaluations Assigned, this column will display the number that have not been completed, but are still in the evaluator's queue of evaluations.

• Evaluations Aged and Deleted: Pending evaluations can be deleted with either the Adjustments or the Aged Evaluations tools. A count of pending evaluations that were deleted with either of these tools will display here. Deleted evaluations will count against an individual's overall compliance.

• Suspended and Deleted: Suspended evaluations can be deleted with either the Adjustments or the Aged Evaluations tools. A count of suspended evaluations that have been deleted using either of these tools will display here. Suspended evaluations that are subsequently deleted will not count against an individual's overall compliance. The number displayed here is subtracted from the Evaluations Assigned total when calculating % Complete.

• Evaluations Suspended: Displays a count of the evaluations that have been suspended by the assigned evaluator. When applicable, you may click the number to open a list of the evaluations that have been suspended and the justifications given by the evaluator for suspending. Suspended evaluations that are subsequently deleted will not count against an individual's overall compliance. The number displayed here is subtracted from the Evaluations Assigned total when calculating % Complete.

Tip: Suspended evaluations can be be re-opened by an Administrator using the Adjustments tool. Alternatively, suspended evaluations can be deleted using the Adjustments or the Aged Evaluations tools.

• % Complete: The overall percent complete is calculated using the column totals and the following formula:

  o % Complete = Evaluations Complete / (Evaluations Assigned - Evaluations Pending Review/Release - Suspended and Deleted - Evaluations Suspended)

Information contained in this guide is confidential and proprietary
- **Time Logged On**: A count of the number of times that the individual has logged into his/her E*Value account for the selected report period will display.
- **Last Login**: The date of the individual’s last login to E*Value will display.

**Note 3**: Review Suspended and Deleted Evaluations and Comments

- Click the linked total of suspended evaluations for a user to review the evaluation details and the evaluator’s suspension comments.

**Note 4**: Send Email Reminders via Post Office

- Click the To Post Office button to email individuals included in the report. This may be useful for quickly emailing users with pending evaluations.

**Note 5**: User Logins Who Have No Evaluation Assignments

- A list of users who were not assigned evaluations for the filter criteria selected is displayed below the main report.

Parent Administrator Roles may also generate the report by Home Program and Activity, as shown in the examples below.

**By Home Program of Evaluator**

Click the +/- icon to view the details for a specific program.

Information contained in this guide is confidential and proprietary
**Advanced Informatics**  
**Egme-GME Office**

**Compliance Threshold**

<table>
<thead>
<tr>
<th>Threshold: Less than or equal to 100%</th>
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<tbody>
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<tr>
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<table>
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<table>
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<th>Evaluations Not Completed</th>
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| Grand Totals                           | 207                  | 12                    | 148                      | 37                    | 1                     | 7.45       | 0              | 0          |
Emailing Non-Compliant Evaluators

The Compliance report includes a shortcut to E*Value’s Post Office that will automatically select the individuals included in the report. Click the To Post Office button to email users.

![Emailing Non-Compliant Evaluators](image)

You may click the Back button in the upper-right corner to return to the Compliance report results.
Session:
Coursework and Custom Fields

Learning Modules

The Learning Modules component is your access point to managing coursework, including tools to:

- Create forms, assign graders and define schedule parameters
- Make adjustments, review/release forms and enter answers or grades
- Generate grade and performance reports

Setup

Set up Coursework forms that can be used to gather responses and feedback from users; features include:

- Coursework forms support document-type questions. This way, trainees can upload documents to be graded.
- Coursework can be graded by an advisor, mentor, educator or Program Administrator.
- Coursework forms can have grader-specific questions that can be used to add comments, feedback and/or grades to the completed form. If the question is created with a Grade Type scale, then the grade will flow through to the Coursework Summary report.
- You may assign set due dates to coursework.

Coursework generates based on the activities that trainees are scheduled into and the parameters you define. Coursework can be generated automatically based on schedule information, on-the-fly based by trainee or manually by an Administrator or Educator.

The following steps outline the general process for creating coursework and assigning it to users.
Create and Edit Coursework

Maintenance

Use the Coursework Maintenance tool to create Coursework Types. The label you give the Coursework Type should be descriptive enough that trainees and educators recognize the coursework when it is assigned. You may also use this tool to manage whether or not a Coursework Type can be generated on-the-fly or manually. Once you have created your

Note: Certain terms that appear on this screen can be translated for your program and therefore may not match the image above.
coursework forms, you may also use this tool to manage Activity, Coursework Type and form links.

**Before You Begin**

When creating Coursework for the first time, you will begin by creating a new Coursework Type. When creating a new Type, consider the following tips:

- **Coursework must be linked to an activity in order to generate.** Whether you intend to assign coursework automatically, or through a manual process, only users scheduled for the activity that coursework is linked to can be assigned coursework. If you have not already created the necessary activity, you may do so using the **Rotations** tool.

- **The Coursework Name** should be descriptive enough that trainees and educators recognize the coursework when it is assigned. If you enter a name that closely resembles a Coursework Type that is already in use in E*Value, then you may be prompted on whether or not you would like to use the existing type:

  ![Coursework Maintenance](image)

  Using an existing Coursework Type will not inhibit your ability to assign your own unique parameters regarding how the coursework generates.

- **The Allow in Assign Coursework** option may be used if you would like the ability to:
  - Allow the individual completing it to generate it “On-the-Fly.” This is useful if the individuals completing the coursework do not all complete it on the same schedule, or for the same site or grader. Using the **Coursework On-the-Fly** menu item, individuals scheduled into the activity linked to the coursework will be able to select the Site, Time Frame and Grader for the coursework to be completed.
Allow an Administrator or Educator to “manually assign” it to trainees scheduled into a particular activity and Time Frame. The individual assigning the coursework will have the option to select the trainees that the coursework is assigned to. See Assign Coursework for more information.

**Note:** If the parameters for coursework generated on-the-fly or manually specify a due date, that due date will be based on the date that an individual generated. For example, your parameters may specify that coursework is due 3 days after it generates at noon. If Jane generates this coursework on-the-fly on October 5th, it will be due at noon on October 8th. If Bill generates this same coursework on-the-fly on October 18th, it will be due for him at noon on October 21st.

- If the coursework form that should be linked to the coursework type is already in use in your program, you may link the form and type using this tool. The Coursework Forms tool can be used by individuals assigned the Coursework Editor role to create and modify forms.

### Creating New Coursework Type(s)

**Coursework Maintenance**

<table>
<thead>
<tr>
<th>Coursework Name:</th>
<th><img src="image" alt="1" /></th>
</tr>
</thead>
<tbody>
<tr>
<td>Allow in Assign Coursework?:</td>
<td><img src="image" alt="2" /></td>
</tr>
</tbody>
</table>

- ![3](image)
- ![5](image)

**Existing Coursework**

<table>
<thead>
<tr>
<th>Coursework ID</th>
<th>Name</th>
<th>Allow in Assign Coursework?</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>5915</td>
<td>II Findings 2010-2011</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>5974</td>
<td>II Projects 2010-2011</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>5977</td>
<td>II Research 2010-2011</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>5977</td>
<td>II Findings 2011-2012</td>
<td>Yes</td>
<td></td>
</tr>
</tbody>
</table>

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

1. **Coursework Name:** Enter a descriptive label for the Coursework type. The Coursework type is visible to the trainee and graders. Clearly label the type to avoid questions.

2. **Allow in Assign Coursework:** If you select ‘Yes,’ the Coursework will be available to generate on-the-fly using the Assign Coursework tool. Users must still be scheduled into...
an activity in order to generate the coursework, but you will be able to assign it immediately at any point within the Time Frame they are scheduled. Coursework can also be assigned automatically relative to the scheduled Time Frame using parameters defined from the Coursework Parameters tool.

3. Select the Add Coursework button to create the Coursework type. If there is an existing Coursework type with a similar name, you will be prompted to select from the existing list. You have the option to choose from the list or you can choose to ignore and create your new Coursework type. The Existing Coursework table will refresh with your Coursework type. The Coursework module ID is displayed to you for use in troubleshooting. If you have questions about a specific Coursework type, provide this ID to the Client Service Consultant for troubleshooting.

4. From the Existing Coursework table, you can update the Allow in Assign Coursework status of the Coursework types. If the Coursework type is not in use, you can remove it by selecting the red minus icon from the Action column. Coursework types that are already in use cannot be edited or deleted.

Linking Coursework Type to Existing Rotations and Forms

1. Once you have created your Coursework type, you can select the Link Coursework button to link the Coursework type to existing activities and existing coursework forms, as described below. If the form to be used for this type has not been created, you will not be able to create the necessary links. Instead, you can use the Coursework Forms tool to create the necessary form, as long as you are assigned the appropriate role in E*Value. The process of creating the form will automatically prompt you to link the form to the applicable Rotations and Coursework types, but you can always use this tool to link the form to additional Rotations and Coursework types.

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

1. **Activity:** Select the activity to be linked from the drop-down menu.

2. **Coursework:** Select the Coursework to be linked from the drop-down menu.
3. **Form:** Select the form to be linked from the drop-down menu. To create forms, use the **Coursework Forms** tool.

4. Select the **Add Link** button to create the specified links. If the Activity/Coursework type combination selected has not previously been linked to a form, a message will inform you that the link has been added. If the Activity/Coursework type combination selected had previously been linked to a form different than the one selected, you will be asked if you would like to replace the initial form. If the Activity/Coursework type combination selected had already been linked to the selected form, you will be informed that the link already exists. Select the **Close** button to return to the **Coursework Maintenance** screen.

**Next Steps**

The next step toward assigning coursework depends on whether or not you have linked the Coursework type to the necessary Rotations and Coursework Form.

- If you need to create the Coursework Form:

Use the **Coursework Forms** tool to create and link your forms. Only users assigned the Coursework Editor Role can create and modify forms. You will be able to link your new form to the Coursework type and necessary Rotations when you create the form. You may always use the Coursework Maintenance tool described above to link forms to additional Coursework Types and/or Rotations.

- If you have already linked your Coursework Type, Forms and Rotations:

Use the **Coursework Parameters** tool to define when the coursework should generate, who should complete it, who should grade it, when it is due and when it is available for reporting.

---

**Forms** Administrators can be granted access to enter and modify coursework forms online using the **Coursework Forms** tool. This tool is very similar to the **Edit Evaluations** tool. If you are familiar with that functionality you will find the steps to be very similar for Coursework. Two significant differences from Edit Evaluations tool are the ability to designate Grader Questions and the ability to add Document Upload question types.

**Edit Existing Coursework Form**

Begin by filtering for the Coursework Form to be edited.
1. **Activity Group:** You may narrow your search by selecting an Activity Group filter.

2. **Activity:** You may narrow your search by selecting an Activity filter.

3. **Coursework Type:** You may narrow your search by selecting the coursework type.

4. Select the **Next** button to display coursework matching your filter criteria.

On the following screen, you will see a table with the list of the selected activities down the left side and the coursework types across the top.

### Form Selection

<table>
<thead>
<tr>
<th>Activity/Module</th>
<th>III Findings 2010-2011</th>
<th>III Projects 2010-2011</th>
<th>III Research 2010-2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ambulatory Care</td>
<td>71727</td>
<td>71727</td>
<td>71727</td>
</tr>
<tr>
<td>Anesthesiology</td>
<td>N/A</td>
<td>N/A</td>
<td>71843</td>
</tr>
<tr>
<td>Cardiovascular Disease</td>
<td>N/A</td>
<td>N/A</td>
<td>71727</td>
</tr>
<tr>
<td>Clinical Skills</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Dermatology</td>
<td>N/A</td>
<td>N/A</td>
<td>71727</td>
</tr>
<tr>
<td>Emergency Medicine</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Evaluation Preview</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Immunology</td>
<td>N/A</td>
<td>N/A</td>
<td>71727</td>
</tr>
<tr>
<td>Internal Medicine</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>

In each cell you will find either an N/A - indicating that no coursework is linked to that activity for that coursework type - or a form number. Select the activity/form combination that you want to edit.

The coursework will display a list of questions. Each question will resemble the following:
1. This row of buttons allows you to **Edit** the existing question, **Remove** it from the coursework, or reorder the sequence in which the question appears on the evaluation (**Move Up**, **Move Down**).

2. This area displays the coursework question's text (in this example, 'Select the types of research utilized. Select all that apply'). Additionally, this area displays the current question order, whether or not the question is mandatory, confidential or answered by Grader.

3. Finally, the answer options for a question will display below the question text. This area will appear different depending on question type. To view examples of the different question types, see **Question Types**.

**Edit an Existing Question**

Once you have identified the coursework you want to edit, you can edit an existing question by selecting the **Edit** button for that question.
1. **Question Header:** If desired, you can add a header before this question. Headers tend not to be question specific, but rather an indication of the subject area to which the following question(s) pertain. They can also be used to link a document, such as a PowerPoint presentation, that the user will need to view to answer the question. Common headers are Medical Knowledge, Professionalism etc. Select the **Add Header** button to define the header text and appearance. If the header you want to add has already been created in a different evaluation form, it will appear in a table at the bottom of the screen. From this table, you can simply **Add** the existing header. Alternatively, if needed, you can **View/Edit** the existing header. Please note that headers are not part of the printed report. To include headers as part of the printed report, add the header as part of the question topic.

2. **Question Topic:** Every question must have a question topic. The question topic is the subject of the question. This is helpful when running reports, especially if the question is particularly long.

3. **Question Text:** Question text is not mandatory but it does allow for a longer description of the question than the topic field.

4. **Mandatory?:** Indicate whether or not the question is **Mandatory.** A coursework form cannot be submitted until all of the mandatory questions have been completed. If a user attempts to submit an incomplete coursework form, the coursework will reopen for them with the unanswered mandatory questions highlighted in red.

5. **Confidential?:** Indicate whether or not the question is **Confidential.** Confidential responses are only viewable by the Program Director.

6. **Grader Question:** Define if the question you are creating is the Grader Question. This question can only be completed by the individual defined on the Coursework Parameters page as the grader. It can be seen by the Student if you choose but it cannot be edited by the student. To avoid confusion, we recommend you add this as the last question on the form.

7. **Question Type:** Select the question type from the drop-down menu and then click the **Continue/Save** button. For examples of the available types, see **Question Types.** If the chosen question type requires additional parameters, the screen will refresh with fields for defining these parameters. The following questions types are available:

   1. **Comment** - This type is displayed as a text box. No additional parameters are required for this type.

   2. **Multiple Choice** - Questions with this type can be displayed as either radio buttons or a select box. Select the display type from the **Choice Format** drop-down. Select the **Add New Choice** button to add answer options. Enter an option in to the text field, then select the **Save And Add** button to continue adding options. Once you have added all options, select the **Save and Complete** button.
3. **Multi-Select** - Questions with this type are displayed as check boxes. Select the **Add New Choice** button to add answer options. Enter an option in the text field, and then select the **Save And Add** button to continue adding options. Once you have added all options for this question select the **Save and Complete** button.

4. **Numeric** - This type is displayed as a blank text box. No additional selections are required for this type.

5. **Scale** - Once you select the **Continue/Save** button after selecting this type, the screen will refresh, giving you the option to enter a **Low-Point Description** and **High-Point Description**. Additionally, you will have the ability to define a new scale by clicking the **Select Choices** button, or use an existing scale, using the **Use These Choices** button. You can use the **Preview** button to review how the scale will display. For more information on defining the scale type, see **Question Scales**.

6. **Short Answer** - This type is displayed as a blank text box. No additional selections are required for this type.

7. **Document Upload** - As with other questions, the Document Upload type will have text, topic and the other standard parameters. However, like Comments, when you choose Document Upload, you are done building the question. For an end user, when completing the form they will see the question topic, text and a search folder icon. This will allow users to upload multiple documents. Once a document has been uploaded, the question is deemed to have satisfied the mandatory requirement.

8. You can preview your question by selecting the **Preview Question** button. If you are satisfied with your changes, select the **Submit Changes** button. You will be returned to the Coursework form screen.

In addition to the list of questions, the Coursework screen displays the following options, in the lower portion of the screen:

![Buttons](image)

1. Select the **Save for Later** button to save the changes you are working on for later. You will be prompted to indicate if you would like other Coursework Editors in your program to be able to edit this coursework. Once you have made your selection, the screen will refresh and you will be taken back to the original filter screen. At the bottom of the screen you will see a table of **Incomplete Edited Coursework**. If you change your mind about this draft coursework you also have the option to delete it. The status of this coursework will be locked if you have indicated that you are the only Coursework Editor who should be allowed to modify it.
2. Select the **Cancel/Back** button if you decide to not edit this coursework. You will be asked to confirm that this is what you want to do. An entry will be made to the **Incomplete Edited Coursework** table, but the original coursework will also remain.

3. Select the **Preview Changes** button to view how the coursework would look to your users.

4. Select the **Complete Changes** button to record any modifications you have made to the coursework. You will be asked to confirm that you want to save all changes. Click **OK** when you are ready to save all changes. You will be asked to name your coursework form. Enter a name that is meaningfully to you and click **Continue**. Next you will be shown everywhere that the original form was linked and asked if you would like to replace it.

**Link Edited Form to Existing Rotations and Coursework Types**

**Coursework Editing - Link Courseworks**

<table>
<thead>
<tr>
<th>Activity/Coursework Type</th>
<th>Ill Research 2010-2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anesthesiology</td>
<td>71843</td>
</tr>
</tbody>
</table>

Put a check mark next to each Activity/Coursework type combination where you would like the updated coursework form to replace the old coursework form. You can also click **Select All** button at the bottom if this coursework form is going to be linked to all of the indicated activities for a Coursework type. Once you have made your selections, click **Save Coursework** button.

The next screen will show you a history of coursework form created and removed for each Activity and Coursework type. This history page can also be accessed from the main **Coursework Forms** screen by selecting the **View Coursework Link to Activity History**.

**Link Courseworkforms to Activities - History Page**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Coursework Type</th>
<th>Change</th>
<th>Change Date</th>
<th>Change Time</th>
<th>Change By</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anesthesiology</td>
<td>Ill Research 2010-2011</td>
<td>Add - 71852</td>
<td>10/21/2010</td>
<td>3:50:39 PM CDT</td>
<td>Booth, Danaca</td>
</tr>
<tr>
<td>Anesthesiology</td>
<td>Ill Research 2010-2011</td>
<td>Remove - 71843</td>
<td>10/21/2010</td>
<td>3:50:39 PM CDT</td>
<td>Booth, Danaca</td>
</tr>
<tr>
<td>Anesthesiology</td>
<td>Ill Research 2010-2011</td>
<td>Add - 71843</td>
<td>10/21/2010</td>
<td>2:07:05 PM CDT</td>
<td>Booth, Danaca</td>
</tr>
<tr>
<td>Anesthesiology</td>
<td>Ill Research 2010-2011</td>
<td>Remove - 71727</td>
<td>10/21/2010</td>
<td>2:07:05 PM CDT</td>
<td>Booth, Danaca</td>
</tr>
<tr>
<td>Ambulatory Care</td>
<td>Ill Projects 2010-2011</td>
<td>Add - 71727</td>
<td>10/19/2010</td>
<td>12:37:45 PM CDT</td>
<td>Informatics, Advanced</td>
</tr>
</tbody>
</table>

Click on any of the blue column headers to sort the table.
Add a Question

You can also add a question to an existing coursework form using the Add Question button that appears on the coursework editing form:

Adding a question is the same process as Editing an Existing Question, which is described above, with one exception. When you add a new question, you have the option to select an existing question from any coursework form being used by the program, as described below.

Linking an Existing Question

You will see the following at the bottom of the Add Question form:

![Existing Questions Table]

Begin by filtering for the question.

1. **Coursework Type:** Narrow the questions by coursework type. The list includes the different types of coursework used by your program.

2. **Question Type:** Indicate the type of question you are looking for.

3. **Sort Order:** The table can be sorted by Question Topic, Question Text, Question Number, Mandatory or Confidential.

4. **Keyword:** You may enter a keyword to assist in your search of existing questions.

5. Select the View Questions button once you have defined the filter criteria. The table will refresh with questions matching your criteria.
By selecting the links in the **Action** column of this table, the question can be previewed, edited or added to the coursework.

- **Preview** - Preview allows you to see the question in electronic format, including any appropriate scale options, etc.

- **Edit** - Clicking Edit will refresh the screen, pre-filling the pertinent fields with the question information.

- **Add** - Adding the question will add it to the coursework and return you to the list of questions for this selected coursework form.

---

**Create New Coursework Form**

You also have the option of creating a new coursework form from the main **Edit Coursework** screen by selecting the **Create New Coursework Form** button. You will be brought immediately to the **Add Questions** screen. You can either **Add a Question** or **Link an Existing Question** to the new coursework form using the instructions above. Add all necessary questions for this coursework.

You will have the same options while creating a coursework form as you do while editing a form: **Save For Later, Cancel/Back, Preview Changes** or **Complete Changes**. When you select the **Complete Changes** button you will be prompted to confirm that you want to save all changes. Click **OK** when you are ready to save all changes. You will be asked to name your coursework form.

![Coursework Editing](image)

Enter a name that is meaningfully to you and click **Continue**. You will automatically be redirected to a filter for specifying the activity - or activities - and coursework types that the new coursework form should be linked to, as described below.

**Link New Form to Existing Rotations and Coursework Types**

Begin by filtering for the Activity and Coursework Types.

![Activity and Coursework Filters](image)

Information contained in this guide is confidential and proprietary
1. **Activity:** Select the activity or activities that will be linked to the new form. You can filter by **Activity Group**, if needed.

2. **Coursework Type:** Select the coursework type or types that will be linked to the new form.

3. Select the **Next** button to see a table of activities and coursework type combinations matching your filter criteria.

### Coursework Editing - Link Courseworks

<table>
<thead>
<tr>
<th>Activity/Coursework Type</th>
<th>III Findings 2010-2011</th>
<th>III Projects 2010-2011</th>
<th>III Research 2010-2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ambulatory Care</td>
<td>71727</td>
<td>71727</td>
<td>71727</td>
</tr>
<tr>
<td>Anesthesiology</td>
<td></td>
<td></td>
<td>71852</td>
</tr>
<tr>
<td>Cardiovascular Disease</td>
<td></td>
<td></td>
<td>71727</td>
</tr>
<tr>
<td>Clinical Skills</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dermatology</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Emergency Medicine</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Evaluation Preview</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Immunology</td>
<td></td>
<td></td>
<td>71727</td>
</tr>
<tr>
<td>Internal Medicine</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Place a check mark in the boxes corresponding with the appropriate coursework type and activity or use the **Select All** buttons to apply the coursework to all activities in a Coursework type column. Select the **Save Coursework** button when you have made all of your selections.

The next screen will show you a history of the coursework forms created and the coursework forms removed. This history page can also be accessed from the main **Coursework Forms** screen by selecting the **View Coursework Link to Activity History**. Select any of the blue column headers to sort the table.

Information contained in this guide is confidential and proprietary
Incomplete Edited Coursework

If you selected the **Save for Later** button while editing or creating a coursework form, the form will be available to you in the lower portion of the main Coursework Forms screen, under the heading **Incomplete Edited Coursework**.

<table>
<thead>
<tr>
<th>Form Number</th>
<th>Last Updated</th>
<th>Updated By</th>
<th>Status</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>69195</td>
<td>10/22/2010 01:27 PM</td>
<td>Booth, Danaca</td>
<td>Open</td>
<td>Delete</td>
</tr>
</tbody>
</table>

1. Select the **Form Number** to resume editing or creating your form.
2. Select the **Delete** link to remove the form entirely from E*Value.

Completed Coursework

If you selected the **Complete Changes** button while editing or creating a form, but had to stop working on the task before you linked the form to existing Rotations and Coursework types, the coursework form will be available to you in the lower portion of the main Coursework Forms screen, under the heading **Completed Coursework**.

1. **Form Name**: The name you assigned to the form, along with the date it was last worked on, will display in this column.
2. To see the form, select the **Preview** link.
3. To link the form to Rotations and Coursework types, select the **Link Coursework** link. This will walk you through the same process describe above under, **Link New Form to Existing Rotations and Coursework Types**.

**Note**: Forms located in the **Complete Coursework** table can also be linked to existing activities and Coursework types using the **Link Coursework** button located on the **Coursework Maintenance** tool. However, this button will only allow you to link the form to one activity and one Coursework type at a time. If the form will be linked to multiple activities or types, it is advisable to create links using the **Completed Coursework** table. Once the form has been linked, using either method, it will no longer appear in this table.
Once your form has been linked to the appropriate activities and Coursework types, you can use the **Coursework Parameters** tool to define when and how coursework generates.

---

**Schedule**

Coursework generates based on the activities that trainees are scheduled into and the parameters you define. Coursework can be generated automatically based on schedule information, on-the-fly based by trainee or manually by an Administrator or Educator.

**Parameters**

Coursework generates based on the activities that trainees are scheduled into and the parameters you define using the **Parameters** tool. Using this tool you can define or edit when and how Coursework forms generate for selected activities. Coursework forms must already linked to an activity and Coursework type in order to be available from this tool.

**Selecting Coursework**

Begin by selecting the activity and Coursework. Coursework will generate for the trainees scheduled into the selected activity according to the parameters you define below.

1. **Activity**: Select an activity from the drop-down list. You can filter the list by **Activity Group**. If the activity is already linked to Coursework, the bottom of the screen will refresh to display **Linked Coursework**.

2. **Available Coursework**: Select the Coursework to be linked from the list. The list will populate with Coursework modules that are available for the activity selected above. Only Coursework that has already been linked to an activity and form will be available for selection. These links can be created using either the **Coursework Maintenance** or **Coursework Forms** tools.

3. Select the **Add New Coursework Link** button to link the selected activity with the available Coursework.

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Information contained in this guide is confidential and proprietary
Editing Parameters

Linked Coursework will appear in the lower portion of the screen based on your filter selections. You may edit the parameters, as described below. Please note, your changes to the remaining columns will be automatically saved in real time. You will receive an "Update Successful" message as you make these changes.

1. **Generation Date:** For the activity/form combination, indicate when the coursework should generate. You may specify the number of days before or after the Time Frame Start date, the number of days before or after the Time Frame End date, or ‘Manually Assign’ if the Coursework will be assigned via the Assign Coursework tool. The form will default to Send Notification Email. Uncheck the Send Notification Email box to prevent email notifications from being sent.

To confirm the calendar date that Coursework will generate for a particular Activity/Time Frame, you may click the Show Evals icon that displays on the Add/Edit Schedule and Individual Scheduling tools. Alternatively, you may use the Coursework To Be Assigned tool to view scheduled coursework dates or coursework that has already been assigned.

2. **Completed by:** For each activity/form combination, define which rank of user should complete the Coursework. To select multiple ranks, use the Shift, Ctrl and Apple keys.

3. **Grader:** The grader may be one of several people. Select from the options in the drop-down list.

   1. **No Grader** – Select this option if the coursework does not need to be graded.
   2. **Role** - You may select an Advisor or Educator Role from your program:

      1. **Educators** - If you select an Educator Role, then the specific educator(s) who are responsible for grading the coursework must be scheduled into the Activity and Time Frame associated with the coursework. If your program is using Site or Team scheduling, the Educator will be assigned based on the trainees and educators who are scheduled together. If more than one educator is scheduled for the selected activity, either educator can complete the form. However, once coursework has been graded by one user, it cannot be graded by another user and it will no longer display in the Grade Coursework queue.
2. Mentor/Advisor - You may select an Advisor Role. In order for advisors to receive the correct coursework to be graded, you must first set up the appropriate advisor/advisee relationships using the Advisors tool. If more than one advisor/mentor relationship exists, either user may grade the coursework. However, once coursework has been graded by one user, it cannot be graded by another user and it will no longer display in the Grade Coursework queue.

3. People Group - Designated People Groups can be set up as graders using the People Groups tool. You must flag the group as "Group Used In Coursework Grading" in order for it to display as an option here. These individuals do not need to be scheduled with trainees in order to receive coursework to be graded. However, because this grader assignment is not schedule based, if you select this option, then the Grade Coursework queue for the individuals included in the group will immediately populate with any coursework pending a grade for this Activity and Coursework Type, regardless of when the coursework was completed.

4. Specific Individual – Alternatively, you may select an individual in your program who is responsible for grading. The list will populate with anyone in your program assigned an Educator or Administrator Role.

Note: If Coursework is generated On-the-Fly, the trainee will be required to select a Grader for the coursework. The Grader selected by the trainee will override the Grader selected in Coursework Parameters for that Activity and Coursework Type. The trainees will be able to pick from a list of individuals assigned an Educator Role in your program.

4. Grader Email Notification: Define how the grader email should be sent to the user from the choices described below.

   1. Nightly Batch Emails (default) - If Nightly Batch is chosen, notifications to the graders will be sent overnight in a batched process with all of the notices in one email.

   2. Individual Email – If Individual Emails is chosen the grader will be notified each time a form has been completed that he or she has a form pending to be graded.

   3. No Notification – Select this option if no notifications should be sent.

5. Due Date/Time: For the activity/form, define whether or not a due date is required. If a due date is required, specify the number of days after the Generation Date that the assignment should be due and the specific time. The due date/time will be listed as part of the header of the form and will also be included in the email to the trainee. Once the due date/time has passed, a notice will be added to the form, indicating that the form was completed after the due date/time. The header will note both the due date/time and the completion date. If the due date/time is changed, a notice will pop-up that says "should this change apply to any forms that currently pending completion." Selecting
‘Yes’ will move the due date. Selecting ‘No’ will keep the due date as it was at the time of generation.

1. If the Coursework is assigned via the ‘Assign Coursework’ screen, the due date will be calculated based on the date the Coursework was assigned. If a user is scheduled after the due date, the due date for the user will be calculated based on the assigned date. If a user is scheduled 3 days after other users are assigned, the due date will also calculate on the assigned Coursework date for that user only.

Tip: If necessary, you may adjust the due date for coursework assigned to an individual using the Coursework Adjustments tool.

6. **Grader Questions:** Coursework forms are unique from other E*Value assessment types in that they can contain questions designated as for a Grader. Depending on program needs, you may or may not want the trainee completing the coursework to be able to view these questions. Use the options in this column to define your preferences. Available options are described in the table below.

<table>
<thead>
<tr>
<th>Can View Questions</th>
<th>Can View Answers on Re-assign</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>No</td>
<td>Trainees will not be able to view Grader questions either during initial completion of the form, or on re-assignment (if applicable).</td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>The question text for Grader questions will always be visible to the trainee, but the answers will not be visible if the form is re-assigned.</td>
</tr>
<tr>
<td>Yes</td>
<td>Yes</td>
<td>Grader questions will always be visible to the trainee and answers will also be visible if the form is re-assigned.</td>
</tr>
<tr>
<td>No</td>
<td>Yes</td>
<td>This configuration is not allowed. You will be prompted to make different selections.</td>
</tr>
</tbody>
</table>

7. **Review/Release or Reciprocity:** You can define the condition that must be met prior to the trainees being able to view the completed Coursework. You can choose to apply:

1. **Review/Release** - if Review/Release is chosen, the graded form will go into review/release prior to the trainee being able to see the grade.

2. **Reciprocity** - If the Coursework Grader is also the Educator for the Activity, then trainees will be required to complete any pending evaluations about the Educator/Grader for that Activity before they can see their coursework grade.

3. **Both** - will enforce both rules.

4. **Neither** – default selection; no condition requirements.
8. **Start Date and End Date:** You can choose the time period during which the coursework parameters are active; this is particularly useful if you are scheduling coursework for a future Time Frame, but do not want it to generate for the current Time Frame. The selection will default to the current date, but you may select a date either in the past or future. If you choose to back-date coursework parameters, please note that coursework will not automatically generate if the **Generation Date** selected in Step 3 has already based (relative to the current Time Frame). You may also define an **End Date** - or expiration date - for coursework parameters. This field is not required and may be left blank.

9. **Action:** The final column includes icons to Delete, or Clone.

**Cloning Coursework Parameter Setup**

Select the clone icon to clone the coursework setup for the select activity to other activities. The **Clone Coursework Parameter Setup** window will display:

![Clone Coursework Parameter Setup Window](image)

**Clone parameters by selecting all of the activities and coursework modules that should follow these parameters. You will be able to make adjustments, if necessary, after parameters have been cloned.**
1. **Available Rotations**: Highlight the activities that the coursework should be linked to and use the green add icon to move your activities to the **Selected** list.

2. **Available Coursework**: The coursework from which you selected the clone icon will automatically be included in the **Selected Coursework** list. If necessary, use the green add icon to add additional coursework. You may also use the red remove icon to remove selections.

3. Select the **Clone** button to finish cloning the selected coursework to the selected activities.

---

**Assign**

Coursework can be assigned manually using the **Assign** tool. This is useful, for example, if you have a trainee who joins an activity late who must be assigned coursework that have already generated for the rest of the trainees scheduled in the activity.

**Note**: For coursework to be available for assignment through this tool, the Coursework type must be set to ‘Allow in Assign Coursework;’ this can be managed from the **Coursework Maintenance** tool. Additionally, ensure that the intended recipient is scheduled into the appropriate activity and Time Frame. Lastly, ensure that the correct coursework form to be generated is linked to the Activity/Coursework type; this can be managed from the **Coursework Parameters** tool.

1. **Activity**: Select the activity associated with the coursework from the drop-down list. Only activities that have been linked to coursework using the **Coursework Parameters** tool will be available from this list.
2. **Time Frame:** Select the Time Frame for the coursework to be assigned. Only past and current Time Frames will be available for use.

3. **Trainee:** Trainees that are scheduled into the selected Activity and Time Frame will populate in the Available list. Select the Trainee(s) to be assigned the coursework and use the green add icon to move the user to the Selected list. To select multiple users at one, use the Shift, Ctrl or Apple keys.

4. **Coursework:** Select the Coursework type for the coursework to be assigned. The list will include all Coursework types that were setup to 'Allow in Assign Coursework.' **Note:** Although all types that are allowed in Assign Coursework will appear in this list, if the Coursework type you select has not been linked to the activity selected in Step 1 through the Coursework Parameters tool, you will receive an error message when you attempt to assign the coursework stating, "The Coursework has not been assigned. Trainee has already received this Coursework or is not scheduled for the Activity."

5. Select the Assign button to generate coursework. A dialog box will inform you whether or not the coursework was assigned successfully.

---

**To Be Assigned**

Coursework will generate based on the Parameters defined for an Activity. Parameters are not Time Frame specific; this allows the parameters to be re-used over time. However, individuals may wish to verify when and for whom coursework will generate for a specific Time Frame. The Coursework Assigned tool can be used to view coursework that has been assigned, or Coursework that will be assigned for a specific Activity and Time Frame.

Select a Time Frame and Activity to see the Coursework that has been assigned and/or will be assigned.

**Important:** To review coursework to be assigned, you must be assigned a Role that is authorized to see trainee data, such as an Administrator Role. The Coursework Editor Role, while necessary to create and modify Coursework forms, is not authorized to view trainee data and will not be able to access data with this tool.
1. **Start and End Date:** You may filter coursework assignments that occur during the date range entered here.

2. **Time Frame:** You must select the Time Frame for the coursework assignments to be reviewed.

3. **Activity:** You must select the Activity for the coursework assignments to be reviewed. You may filter the list of Rotations by Activity Group, name or status.

4. **Coursework Type:** You may select a specific Coursework Type to review, or leave at the default, "All Types."

5. **Trainees:** You may filter for coursework that will be assigned to a particular Rank or a particular Trainee. You may filter the list of trainees by name or status, if necessary.

Click **Next** to view the Coursework assignments.
Manage Completed Coursework

Adjustments

You may use the Adjustments tool to make adjustments to coursework after it has generated. This tool can be used to delete pending forms, re-open completed forms and/or re-open the graded portion of a form.

Review/Release

The Review/Release coursework tool can be used to review coursework completed by users in your program. Using this tool, you can re-open completed coursework for grading or for completion by trainee, as well as place coursework on hold.

Enter Answers/Grades

The Enter Answers/Grades tool allows you to enter Coursework on behalf of a trainee or enter the Coursework Grade on behalf of the Grader.

Reports

Aggregate Performance Summary

The Coursework Aggregate Performance report can be used to view aggregate data on coursework completed by your trainees and responses added by coursework graders. The report results will include any questions created with a Scale, Multiple Choice, Multi-select or Numeric question-type. Use Coursework Performance reports to:

- View summarized data on completed coursework, including means, counts, and standard deviations
- Generate graphical displays: Time Series, Frequency Distribution, Pie Charts, Bar Charts

Coursework Comments

The Comments report can be used to view Comment/Essay and Short Answer-type questions entered on completed coursework forms. These comments may have been entered by a trainee, or by the individual(s) who graded the form. Whether or not the commenter’s identity displays in this report will depend on your Role and your program’s Anonymity Setup. Alternatively, you may opt to generate the report with an anonymity filter turned on so that the identity of all commenters is protected.

Information contained in this guide is confidential and proprietary
Coursework Summary

Use the Coursework Summary report to review status information for Coursework, including whether or not it has been completed and/or graded. You may also access completed Coursework.

Additionally, if due dates were assigned for the Coursework, this report can be used to quickly identify Coursework that was submitted after the due date - those entries will be highlighted red.

Manage Custom Fields

Custom Fields can be attached to User Biographic Data profiles, Rotations, Activity Sessions and Details, Sites and Programs. The Field Type can be customized based on the type of data to be stored. Field Type options include text, numeric, single and multi-select lists, dates, reports and more. The fields can be organized by Sections or into Table Grids. Access to edit and view the data stored in Custom Fields can be restricted/granted by E*Value Role. Additionally, there are a number of reporting options available for data entered in Custom Fields.

Access to manage Custom Fields can be restricted by E*Value Role. Additionally, access to manage Custom Fields may be restricted to a parent-level or institution-wide E*Value program.

Adding Custom Fields to E*Value

Custom Fields can be created throughout E*Value using basically the same setup steps. Before creating Custom Fields, consider:

What will the field track or contain? Custom Fields can be attached to the following:

- **User Biographic Data**: Is the information to be tracked specific to the individuals in your program? You can link Custom Fields to your User Biographic Database by placing the fields on any tab of the User Biographic Data tool.

![Custom Fields in User Biographic Data](image)

Administration | Users | Biographic Data
- **Rotations:** Does the information to be tracked describe an aspect of your program's activities? You can link Custom Fields to your Rotations. For example, you may want to track a department, or course catalog description.

- **Activity Sessions and Details:** Do you need to track additional fields or documents for your sessions? The Activity Sessions tool includes an extensive list of Standard fields that can be tracked for your sessions. However, if you have additional program-specific fields that are not covered, you can link Custom Fields to your sessions or session details.

- **Sites:** Are there site-specific information details or documents you would like to track that are covered by the standard fields? Link Custom Field to your sites.
Program: Is there information about your program(s) that you would like to track? Custom Fields can be linked to your program setup details.

Who needs access to the Custom Field data?

Access to Custom Field data is based an individual's E*Value Roles:

- By default, Roles with access to the menu item used to create the Custom Field can view and edit the data for that field. Additionally, these Roles will automatically be able to access the data in reports that contain this information. To review the menu items that a particular Role has access to, see your Security View tool. To override this default, you can restrict access by Role; see Editing Custom Field Security below for more information.

- Also by default, roles without access to the menu item used to create the Custom Field will not be able to access the data in any reports. To override this default and allow additional roles to view the data in Reports, you can grant access by Role; see Editing Custom Field Security below for more information. Custom Field information can also be shared through Reports, as well as E*Value's electronic portfolio tool, MyFolio; see Reporting & Sharing Custom Field Data below for more information.

Once you know where the Custom Field will be linked and who should have access to its data, locate the appropriate Administrative menu item and click the Manage Custom Fields button.

Note: The ability to create and modify Custom Fields can also be restricted by Role. If the Manage Custom Field buttons are not available to you from the Administrative tools described.
above, then your Role has not been given access to this functionality. You may contact your local E*Value Administrator or your program’s designated Client Service Consultant to be granted access.

Creating Custom Fields

To create Custom Fields, select the appropriate Administrative menu item from those described above and click the Manage Custom Fields button. This will open the Manage Custom Fields pop-up window. This pop-up window is basically the same whether you are creating a User, Activity, Session, Site or Program Custom Field.

Step 1: Create a Section to organize the fields.

Begin by creating a Section. Sections will help organize your Custom Fields. You can either create a standard Section to house fields that are loosely associated, or create a Grid Table Section to house a table of information.

Example of Custom Fields created with the Section Type

![Example of Custom Fields created with the Section Type](image)

Example of Custom Fields created with the Grid Table Type

![Example of Custom Fields created with the Grid Table Type](image)

Select the green add icon in the middle of the window to open the Add/Change Section pop-up:
- **Name**: Enter the name of the section. The name entered here will appear as a header on the form for which you are defining a field.

- **Type**: Select the type - section or grid table. Custom fields included in a section type will be organized under the Section header. Custom fields included in a Grid type can be expanded upon after creation, as shown in the example below:

- **Number of Columns**: Enter the number of columns this section should have on the form being defined.

- **Section Order**: Select the sequence in which this Section should be placed.

- Select the **Save** button to create the Section.

Once you have defined your Sections, you can begin defining the fields you want to capture using the top portion of the **Manage Site Custom Fields** window.

**Step 2: Create the fields for the data to be tracked.**
Use the top portion of the window to create the Custom Fields. Select a **Field Type** to match the type of data to be stored in the field. The options are described in the table below:

<table>
<thead>
<tr>
<th>Field Type</th>
<th>Description</th>
</tr>
</thead>
</table>
| **Short Text**   | ![Course ID](image)  
Select this type for short phrases (fewer than 255 characters); a mixture of alpha, numeric and symbol type characters can be entered. |
| **Numeric**      | ![Score](image)  
Select this type for entering numbers; decimals can be used if necessary. |
| **Percentage**   | ![Percent Complete](image)  
Select this type for entering a percentage. |
| **Single Select Box** | ![Pass](image)  
Use this type to display a single-select list containing the options you define. You have the option of creating a default selection. |
| **Multi-select Box** | ![Semester](image)  
Use this type to display a multi-select list containing the options you define. |
<table>
<thead>
<tr>
<th>Field Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>Select this type to enter dates; dates can be entered manually or using a date-picker.</td>
</tr>
<tr>
<td>Essay</td>
<td>Select this type to enter larger amounts of text with the use of a WYSIWYG editor.</td>
</tr>
<tr>
<td>Certificate</td>
<td>Select this type to upload documents. Click the folder/magnifier icon to upload a file. Once uploaded, files will display with an icon that corresponds to the document type; click this icon to open the file. You can delete uploaded files with the red remove icon or replace it using the corresponding folder icon.</td>
</tr>
<tr>
<td>Hyperlink</td>
<td>Select this type to enter hyperlinks to outside web pages. To add more than one hyperlink, click the green add icon. To preview the hyperlink entered click the disk icon.</td>
</tr>
<tr>
<td>Report</td>
<td>When creating User Biographic Custom Fields, the Report Field Type will be available for generating and sharing Report data. For more</td>
</tr>
</tbody>
</table>
Based on the Field Type selected, the form will re-load with the information you must define for that type.

**Manage User Custom Fields**

- **Manage Context**: When creating User Biographic Custom Fields, the Manage Context selection is used to control which tab of the Biographic Data tool.
- **Field Label**: Defines the name that will appear next to the field.
- **Tooltip Text**: If you enter text here, it will display as a tooltip when a user places his or her cursor over the Field Label.
- **Field Type**: Select the Field Type you want to use from the drop-down menu. Depending on the type you select, the window may re-load with additional fields to define for that type.
- **Required Field?**: If you opt to make this a required field, the user will not be allowed to leave the field blank. A red asterisk will denote the field as required.
- **Show on Grid?**: Indicate if this field is displayed on the User grid. Typically, this should be left unchecked.
- **Field Length (or Column Width)**: Define the length or width of the field by defining the number of characters it should be able to contain.
- **Default Value**: If the field should display a default value or date, enter that here. You do not need to define a default.
- **Section**: Enter the Section of the form being defined that this field should appear in.
- **Column**: Enter the Column of the Section that the field should appear in on the form being defined.
- **Sequence:** Enter the **Sequence** in which the field should appear in the **Column** specified above.

**Step 3: Save.**

Select the **Save** button to create your field. The field will be added to the Section, Column and Sequence specified. You can re-order the sequence of the field manually by selecting it and performing a drag and drop to the new location.

**Customizing Options for Single and Multi-Select Field Types**

The **Field Types** 'Single Select Box' and 'Multi-select Box' require that you define the options for the drop-down menu of the select box. Here's a Multi-select Box field example:

1. **Size:** Define the width of the input box as it will appear for the field. When creating a 'Single Select Box,' you will not need to define a size.

2. **Select Box Options:** Enter an option for the box. If the option you are adding should be the default value for the field, check the **Select by Default?** box. Select the green add symbol to add the option to the list. Repeat this step for the remainder of your options.

3. As you add your options, you can edit, remove or rearrange the option from the list area.

**Editing Custom Field Security**

To edit a Custom Field after it has been created; simply double-click on the field box in the **Sections** portion of the **Manage Custom Fields** window. The previously-defined criteria for that field will display in the top portion of the screen for you to edit. Be sure to **Save** any changes.

You can also edit the security settings for editing and viewing this field by selecting the **Add/Change Security** link that appears below the field criteria. By default anyone assigned to a...
Role that has access to the screen on which the Custom Field appears will have full edit rights for the field. You may restrict this access.

To define security settings for the selected field, refer to the guidance below:
• **Security Setting:** Select whether this security setting should be applied permanently or temporarily. If you select Temporary, a start and end date will appear for defining the length of the security setting.

• **Security Type:** By default, all individuals assigned a Role that has access to the Administrative tool that the Custom Field is attached to will have Edit and View rights to the data; this access will automatically be applied to any reports that contain the data. Also by default, anyone not assigned a Role with access to the Custom Field will automatically be restricted from seeing the data in any corresponding reports. Select the Security Type you would like to use to override these default settings:

To Grant a Role Access to the Custom Field Data in Reports

You can grant access to Custom Field data to Roles that do not have Administrative menu access using the **Can see, but not edit this field** option. Additionally, when editing User Biographic Custom Fields, you can extend edit rights to individuals for their own data; they can edit these fields from the **User Home Page**. To extend these edit rights, select the **Modifiable on User Home Page** option.
**To Restrict a Role’s Access to View or Edit Field Data**

There may be Roles that have access to Administrative tools that have Custom Fields attached that should only have limited abilities to view or edit the data. To restrict access to the data entirely, select the **cannot see this field** option; access will be restricted on the Administrative tool and any corresponding Reports. To make access to the field data Read-only, select the **Can see, but not edit this field** option.

- **Roles:** Use this list and the add/minus symbols specify the Role(s) to which the **Security Type** selected above should apply.

- Select the **Add** button to finish creating the security setting. You can either define additional settings, or select the **Done** button to exit the menu. The table in the lower portion of the pop-up will display existing security settings for this field.

- **Existing Security Settings:** You can use this form to filter the table. Filter by **Security Setting** and/or **Security Type** then select the **Show Existing** button.

**Reporting & Sharing Custom Field Data**

There are a number of reporting options available for Custom Fields, depending on the tool the field is attached to:

**Biographic Data Custom Fields**

- Download Custom Data Fields using the User Data Download tool; data can be sorted and filtered online and/or exported to Excel.

- Share data by Role on Schedule and Site Reports using the Viewable Biographic Data tool.

- Include on MyFolio Templates using E*Value’s electronic portfolio tool.
Activity Custom Fields

Activity Custom Field data can be reported on using:

- **Term Searching tool:** Search engine that will scan Activity Custom Fields and Documents.

- **Activity Panel pop-up:** Many reports include a hyper-linked Activity name. Clicking on this link will open an Item Details pop-up that contains both Standard and Custom Field data. For example:
The Activity Report can be used to download Custom Field data in both HTML and Excel formats. An example of the HTML format:

Site Custom Fields

Site Custom Field data can be reported on using:

- **Term Searching tool**: Search engine that will scan Site Custom Fields and Documents.

- **Site Panel pop-up**: Many reports include a hyper-linked Site name. Clicking on this link will open a Details pop-up that contains both Standard and Custom Field data. For example:
The Report | Sites | Custom Fields report can be used to download Custom Field data in both HTML and Excel formats. An example of the HTML format:

<table>
<thead>
<tr>
<th>Site Name</th>
<th>Parking Info</th>
<th>Location Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Franklin CVS Pharmacy</td>
<td></td>
<td>M-F 8:00 - 5:00, Sat-Sun 9:00 - 4:00</td>
</tr>
</tbody>
</table>

Custom Fields Report

Administrators can create reports using the Custom Field Reports tool that can then be shared with users through MyFolio, Schedule Reports and/or Site Reports. This is essentially a 3-step process that involves creating the report, linking the report as a custom field to users’ Biographic Data, and then granting those users access to the report. Reports can be created for:

Information contained in this guide is confidential and proprietary
- Coursework summaries
- Evaluations about a person
- Examination summaries
- Immunization and Certification data about a person
- Schedule information (by Activity, Student or Educator)

**Caution:** Once a user is granted access to a Custom Field Reports, the report will override settings defined in the **Anonymity Setup** tool. Additionally, if you have defined thresholds for viewing evaluation data only after certain criteria has been met; the Custom Field Report will also override these settings. Before granting users access to these reports, be certain that the information contained in the reports is appropriate for their role.

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**Process Flow Diagram**

The steps required for sharing custom field reports will depend on where you want to share the information and who you want to share it with. The basic steps are shown below, followed by step-by-step instructions.

---

**Creating the Report**

From the **Administration | Custom Field Report** tool, select the type of report to be defined from the drop-down menu. Click the **Next** button to begin defining the report. Each type is described below.
Coursework Summary

To create a report on user coursework data, select the Coursework Summary type and complete the form, as described below:

1. **Date Type**: The Date Type selection indicates to E*Value what coursework to search for within the time period you will indicate in Step 2. The different types correspond to specific events related to coursework. Indicate if the coursework this report captures should be based on the date coursework was generated (Request Date), the date coursework was completed (Completed Date), the date the activity for this coursework started (Time Frame Start Date) or the date the activity for this coursework ended (Time Frame End Date). When selecting a type, it may be helpful to consider the timeline of events as described below in the Selecting a Date Type Tips section.

2. **Time prior to today's date**: The report will always generate information relative to the date it is run and the range defined here. E*Value will search for coursework based on
the **Date Type** selected in Step 1, and will include coursework data in the report if that date type falls within the range defined here. For example, if you selected "Completion Date" in Step 1 and "30 Days" prior to today’s date here, the report will always capture any coursework that was completed in the 30 days prior to the date on which the report is run.

3. **Site:** To see coursework data for a specific site, select the site from the drop-down menu. You may filter this list by **Site Group**.

4. **Activity:** To see coursework data for an Activity, select the activity from the drop-down menu. You may filter this list by **Activity Group**. You can also use the text box provided to filter for a particular activity. Use the drop-down box to limit your list of activities to only those that are active or inactive.

5. **Coursework Type:** You may view a particular type of coursework by selecting options from the multi-select list.

6. Select a user from the **Trainees** drop-down menu to run a sample report. You can use the filter provided to locate a particular trainee. You may use the drop-down box to limit your list of trainees by status using the drop-down provided.

Click the **Run a sample report** button to see an example report. If you are satisfied with the results, you can save the report using the **Save new report** pop-up that appears after viewing the sample:

![Save new report](image)

The Sample report will open in a new window. If you would like to save the report to use as a custom report, enter a name for the report and save the report. If you would like to change your report parameters, click the cancel button to modify the report.

![Save new report](image)

The report will be added to the **Defined Reports** table on the **Custom Field Report** page. Use the edit and delete icons in the **Action** column to modify or remove this report at any time.

---

**Evaluations about a person (User)**

To create a report on user evaluation data, select the **Evaluation about a person** type, as described below:
1. **Date Type:** The Date Type selection indicates to E*Value which evaluations to search for within the time period you will indicate in Step 2. The different types correspond to specific events related to an evaluation. Indicate if the evaluations this report captures should be based on the date an evaluation was generated (Request Date), the date an evaluation was completed (Completed Date), the date the activity being evaluated started (Time Frame Start Date) or the date the activity being evaluated ended (Time Frame End Date). When selecting a type, it may be helpful to consider the timeline of events as described below in the Selecting a Date Type Tips section.

2. **Time prior to today’s date:** The report will always generate information relative to the date it is run and the range defined here. E*Value will search for evaluations based on the Date Type selected in Step 1, and will include evaluation data in the report if that date type falls within the range defined here. For example, if you selected “Completion Date” in Step 1 and “30 Days” prior to today’s date here, the report will always capture any evaluations completed in the 30 days prior to the date on which the report is run.

3. **Site:** To see evaluation data for a specific site, select the site from the drop-down menu. You may filter this list by Site Group.

4. **Activity:** To see evaluation data for an Activity, select the activity from the drop-down menu. You may filter by Activity Group. You can also use the text box provided to filter for a particular activity by name. You can use the drop-down box to limit your list of activities to only those that are active or inactive.

5. **Evaluation Type:** You can view a particular type of evaluation or all evaluations by selecting options from this list. Use Shift, Ctrl or Apple keys to multi-select evaluation types.

**Note:** Certain terms that appear on this screen can be translated for your program and may not match the image above.
6. Select a user from the Trainees drop-down menu to run a sample report. You can use the filter provided to locate a particular trainee. You may use the drop-down box to limit your list of trainees by status using the drop-down provided.

Click the Run a sample report button to see an example report. If you are satisfied with the results, you can save the report using the Save new report pop-up that appears after viewing the sample. The Report will be added to the Defined Reports table on the Custom Field Report page. Use the edit and delete icons in the Action column to modify or remove this report at any time.

Examination Summary (User)

To create a report on user examination data, select the Examination Summary type, as described below:

1. **Date Type:** Indicate if the examination data this report captures should be based on the date an examination generated (Request Date), the date an examination was completed (Completed Date), the Time Frame Start Date or the Time Frame End Date.

2. **Time prior to today’s date:** The report will always generate information relative to the date it is run and the range defined here. E*Value will search for examinations based on the Date Type selected in Step 1, and will include examination data in the report if that date type falls within the range defined here. For example, if you selected “Completion
Date” in Step 1 and ”30 Days” prior to today’s date here, the report will always capture any examinations completed in the 30 days prior to the date on which the report is run.

3. **Site:** To see examination data for a specific site, select the site from the drop-down menu. You may filter this list by **Site Group.**

4. **Activity:** To see examination data for an Activity, select the activity from the drop-down menu. You may filter this list by **Activity Group.** You can also use the text box provided to filter for a particular activity. Use the drop-down box to limit your list of activities to only those that are active or inactive.

5. **Examination Type:** You can view a particular type of examination or all examination by selecting options from this list. Use Shift, Ctrl or Apple keys to multi-select examination types.

6. Select a user from the **Trainees** drop-down menu to run a sample report. You can use the filter provided to locate a particular trainee. You may use the drop-down box to limit your list of trainees by status using the drop-down provided.

Click the **Run a sample report** button to see an example report. If you are satisfied with the results, you can save the report using the **Save new report** pop-up that appears after viewing the sample. The Report will be added to the **Defined Reports** table on the **Custom Field Report** page. Use the edit and delete icons in the **Action** column to modify or remove this report at any time.

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**Immunization and Certification By User**

1. **Immuns And Certs Group:** Select the immunization, certification or other item to be reported on from the drop-down menu. You may filter this list by **Immuns And Certs Group.**

2. **Status:** Indicate a status to be reported on, or leave at the default ‘All.’

3. **Report Header Note:**

4. **The following filters are only used for running a sample report.**

1. **Last Name Filter:**

2. **Trainees:**
3. **Report Header Note:** Enter a report header. The field will default to ‘Immunization and Certification By User.’

4. Select a user from the **Trainees** drop-down menu to run a sample report. You can use the filter provided to locate a particular trainee. You may use the drop-down box to limit your list of trainees by status using the drop-down provided.

Click the **Run a sample report** button to see an example report. If you are satisfied with the results, you can save the report using the **Save new report** pop-up that appears after viewing the sample. The Report will be added to the **Defined Reports** table on the **Custom Field Report** page. Use the edit and delete icons in the **Action** column to modify or remove this report at any time.

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**Schedule (by Activity, Student, Educator)**

To create a schedule report, select one of the available types: by Activity, by Student, or by Educator. These reports correspond to those that can be created from **Reports | Schedules | Rosters**. The type selected will determine the focus of the report.

1. **Date Types:** Indicate the date selection method for this report. The **Date Range Based On Current Date** type requires that you define the length of time before and after the current date to be included in the report. This is a dynamic date range that will adjust the report depending on the day that it is run. The **Specific Start and End** type requires
that you define the start and end date to be used. This is a static report type that will always return data for the date range specified.

2. **Date Selection:** Depending on your selection in Step 1, either indicate the length of time before and after the current date to be included or the specific start and end dates to be included in the report.

3. **Curriculum:** You may filter the list of activities by curriculum. Only activities that are included in the selected curriculum will display.

4. **Activity:** You may select a specific activity, or leave at the default ‘All Rotations.’ You may filter by **Activity Group**. To filter the list by activity name, enter all or part of the activity name in the text box provided and select the **Filter** button. You may also filter by status using the select box provided and the **Filter** button.

5. **Report Columns:** You must indicate which columns should display in the report. Click on items to be included. You may select multiple items using the Shift, Ctrl or Apple keys. Use the arrow button to move the items to the **Selected Report Items** list.

6. **Report Header Note:** You may enter a header note to be included in the report. The text box will automatically display the report type being created.

7. Select a user from the **Subjects** drop-down menu to run a sample report. You can use the filter provided to locate a particular trainee. You may use the drop-down box to limit your list of trainees by status using the drop-down provided.

Click the **Run a sample report** button to see an example report. If you are satisfied with the results, you can save the report using the **Save new report** pop-up that appears after viewing the sample. The Report will be added to the **Defined Reports** table on the **Custom Field Report** page. Use the edit and delete icons in the **Action** column to modify or remove this report at any time.

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**Linking Custom Field Reports to Biographic Data**

Once you have created your report, you can share it with other users in your program by linking it to a custom field. From the **Administration | Users | Biographic Data** tool, select the **Manage Custom Fields** link:

[Manage Custom Fields]

The **Manage User Custom Fields** window will open:
1. **Field Type:** Select the field type 'Report.'

2. Click the **Select Report** button. A dialogue box will open with a list of your custom field reports.

3. Click the green add button to add a report to the custom field. Complete the rest of the fields in the **Manage User Custom Fields** window and select the **Save** button. For more detailed instruction on custom fields, see **Manage Custom Fields**.

After you have linked the custom field report to Biographic Data, it will appear on the tab specified in the **Manage Context** field. Anyone assigned the Administrator role will be able to run and review the report for a trainee by selecting the report icon:

**IC Report**

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**Adding Custom Reports to MyFolio**

In order to add a custom field report to MyFolio, the MyFolio Administrator must have access to the report. After linking the Custom Field Report to a Biographic Data Custom Field, edit the...
security settings for that field using the **Manage User Custom Fields** window. From the **Biographic Data** tool, select the **Manage Custom Fields** link:

**Manage Custom Fields**

The **Manage User Custom Fields** window will open:

1. Begin by double-clicking the custom field report to open the field for editing in the top portion of the window.

Information contained in this guide is confidential and proprietary
2. Click the Add/Change Security link. A window will open for modifying security rights.

3. Security Type: Select the ‘Can see, but not edit this field’ from the select box.

4. Add the ‘MyFolio Administrator’ role to the Selected Roles list using the green add icon. Click the Add button to save your security setting.

From the Manage MyFolio Templates tool, the MyFolio Administrator will now be able to add the custom field report to MyFolio Templates as a New Biographic Field.

The report will be listed under the Custom Fields header with the name you provided.

**Note:** Once a template containing a custom field report is assigned to user portfolios, anyone with access to that MyFolio template, such as a trainee’s Advisor or program Director, will be able to view the report. Use discretion when sharing custom field reports to ensure only appropriate roles are granted access to the data.

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**Adding Custom Field Reports to Schedule & Site Reports**

Custom Field Reports may also be viewed from Schedule and Site Reports. You can define who has this access from the Viewable Bio Information tool.
1. **Role Doing the Viewing**: Select the role for the individuals that you would like to have access to your report from the drop-down menu.

2. **Roles Being Viewed**: Select the role that will be reported on from this list.

3. **Biographical Fields**: Select the report you created from this list. It will appear under the **Custom Fields** header in the list, with the name you assigned to it.

4. **Apply to**: Specify whether access should be granted to Site Reports, Schedule Reports, or both.

5. Use the **Add** and **Remove Access** buttons to record or remove your selections from the **Assigned Objects** list.

The **Role Doing the Viewing** will now be able to view the report when viewing User/Individual Details for the roles specified in Step 2. For example, assume you granted a Clinical Educator role access to view a custom fields report for trainees that was applied to Schedule Reports. In this example, if the educator ran a Roster Report, he or she would be able to view the custom fields report from the **User Details** pop-up window linked to the user's name:

**Roster By Trainee Schedule Report**

*Time Period: 12/10/2010 to 12/10/2011*

*Report Date: 12/10/2010*

Information contained in this guide is confidential and proprietary
Session: Overview of Commonly Used Features and Functions

PxDx - As E*Value’s most customizable component, the PxDx Case Logger can differ greatly from program to program. But whether a program uses PxDx to track procedures, DRPs or patient interactions, this component includes all of the tools Administrators need to define the details, requirements, and acceptance criteria necessary for learner logs. Use this component to:

- Define the fields tracked and other interface preferences
- Specify procedure and diagnosis details, assessment requirements and supervision criteria
- Manage procedure privileges individually or by group using templates
- Set up enterprise-wide procedures and diagnoses

Time Tracking - The Time Tracking component allows programs to create visibility around how their learners spend time. For Graduate Medical Education programs, this includes logging Duty Hours and demonstrating compliance to ACGME accreditation standards. For nursing and allied health programs, this involves defining preferences for tracking student Clinical Hours, such as when, where and under whose supervision hours were logged. No matter what your institutional objectives are, the Time Tracking component includes all of the tools necessary to set up, log, supervise and report on learner time. Use this component to:

- Configure your program or institution’s logging interface preferences, supervision requirements, reminders and report preferences
- Edit trainee or supervisor records
- Oversee duty hour violations, if applicable
**Sessions** - Administrators can use this component to schedule recurring didactic sessions and rounds, as well as one-off conferences and events, quickly and easily. Details can be defined for each, including topic, presenters, handouts and more. Like all E*Value scheduling components, sessions and conferences can be evaluated - the results will be captured and available in dynamic performance reports.

- Allowing presenters to manage session details and documents
- Attendance management
- Evaluating presenters and sessions

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**MyFolio** - Assign electronic portfolios to your users by applying custom MyFolio templates. Contact your Client Service Consultant to learn more about standard templates that can be customized to meet your program needs.

MyFolio is a repository where students, residents, fellows and lifetime learners can collect detailed information about their learning experiences. It can be used as a virtual filing cabinet with folders and file names created by you and your program. It can also be developed for use as an advising tool and as a way for the program to share information with others. MyFolio Administrators use the **Manage MyFolio Templates** tool to create portfolio folders that can then be added to their users’ E*Value accounts. Once a template is shared with a user, they will be able to access it from the **MyProfile** module, where they can view and edit content.
**Contact Users** - Contact Users is your E*Value communication hub. You can use the tools found here to send login and password info to your users, as well as manage evaluation and program reminders. Additionally, you may use this functionality to customize the email text sent for a wide-range of actions in your program. You’ll also find your program Outbox here; this tool provides a fully searchable archive of messages sent to your users. Use this component to:

- Send emails to your users by people group, rank, role or schedule criteria
- Distribute login and password information
- Generate evaluation reminders for all pending evaluations
- Customize the text used for a variety of emails generated from E*Value
- Search a program-wide Outbox of emails generated to confirm information was sent, or trouble-shoot user questions about emails received