EVALUATIONS – Automated Delivery

Clerkship Coordinators can set up rules to have evaluations delivered automatically.

INSTRUCTIONS

Automated Delivery

- Select the clerkship site from right side drop down
- From the Home page, select the Evaluation tab, then select “Add Automated Evaluations”

Select to set up automatic evaluation delivery
On the next page, add:

- **Title**: unique name
- **Delivery**:
  - By Service Dates: assignments on schedule
  - By Course Periods: enrollment periods

Often named by when the evaluation is being released

Select to switch from “By Service Dates” to “By Course Periods”

- **Set Rule**:
  - Prior..., On date, After...
  - Service End Date, Service Start Date, Service Mid-Point Date

Choose X days prior..., on the date, or X days after...
• Select “Initiate Automated Evaluation Set”

Add Automated Evaluations

Title*: Test Automated Rule 7 days prior end date

Method:
Delivery*: By Service Dates...

Available Evaluation Types:
- Student evaluation of faculty
- Student evaluation of a service/clinic
- Student evaluation of an other student (peer)
- Student evaluation of resident
- Faculty evaluation of a student
- Resident evaluation of a student
- Patient/staff evaluation of a student

Initiate Automated Evaluation Set
On the next screen:

- Select “+Add a Delivery Rule”

- Select evaluation type
- Submit
On this page:

- **Rule Status**: select “active” (can leave inactive while setting up and reviewing)
- **Rule Name**: option to name the rule
- **Evaluation Form**: options based on Evaluation Type selected on previous screen
- **Select Services**: make rule for all services or specific services
- **Select Recipient Years**: make rule for student year
- **Notes**: optional
- **Special Options**:
  - Require a signature
  - Anonymous Evaluation: do NOT select this
- **Select “Add Delivery Rule”**

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**Add Delivery Rule**

- **Evaluation Type**: Student evaluation of faculty
- **Automated Evaluation**: Test Automated Rule 7 days prior end date
- **Rule Status**: Active
- **Rule Name**: (optional)
- **Evaluation Form**: Clinical Educator
- **Select Services**: Options to select all services or specific services, and options to select all years or specific years
- **Recipient Years**: Options to select all service or specific services, and options to select all years or specific years
- **Notes**: (optional)
- **Special Options**: (optional) (none)

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**Activate the Rule Status here; can leave inactive while setting up and reviewing**

**Optional, but useful for future reference**

**Select Evaluation form, options based on Evaluation Type selected on previous screen**

**Options to select all services or specific services, and options to select all years or specific years**

**Unless requiring a signature, keep special options as “(none)”**
Now you can simulate delivery to ensure evaluations are delivered according to the criteria you selected.

- Select “Simulate Delivery”

![Delivery rule added]

![Delivery Rules]

- Review

![Simulate Delivery]
The final screen will show a list of evaluations to be released on which days, for an additional review.

Once a form is delivered, it can be removed as long as no one has filled it out. When someone fills it out, it cannot be removed; it can only be made “inactive.”

*Rules for Automated Evaluations can also be made inactive and re-used in the future (next period, etc.*)