

# 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”

The screenshot shows the 'Evaluations' page for 'SURG 300A - Surgery Core Clerkship - Kaiser-Santa Clara'. The page has a navigation bar with 'Home', 'Schedules', 'Procedures', 'Evaluations', 'Conferences', 'Reports', and 'Help'. The 'Evaluations' tab is selected. Below the navigation bar, there is a breadcrumb trail 'Home > Evaluations' and a dropdown menu showing 'SURG 300A - Surgery Core Clerkship - Kaiser-Santa Clara'. The main content area is titled 'Evaluations' and contains a 'Deliver Evaluations' button, a 'Queued Evaluations' table, and an 'Automated Evaluations' table. The 'Automated Evaluations' table has a '+ Add Automated Evaluations' button. A right-hand sidebar contains 'Evaluation Forms' and 'Evaluation Functions' sections. Blue arrows point to the 'Site Specific Clerkship' dropdown, the 'Evaluations' tab, the 'Site Specific Clerkship' dropdown in the breadcrumb, and the '+ Add Automated Evaluations' button.

Site Specific Clerkship

Site Specific Clerkship

Evaluations tab


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

[Home](#) » [Evaluations](#) » Add Automated Evaluations

### Add Automated Evaluations

Title\*:   Often named by when the evaluation is being released


Method:  
Delivery\*:   Select to switch from "By Service Dates" to "By Course Periods"

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

AUTOMATED EVALUATION NOTES:

1. Available evaluation types differ based on Delivery Method selected above

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

Delivery\*:   **STEP ONE**  
Choose X days prior..., on the date, or X days after...

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

Method:

By Service Dates...

On date...

- ✓ Service End Date
- Service Start Date
- Service Mid-Point Date



**STEP TWO**

Available Evaluation

- Student evaluation of faculty
- Student evaluation of a service/clinic
- Student evaluation of other student (peer)
- Student evaluation of resident

Based on STEP ONE, selection here refers to Service End Date, Start Date, or Mid-Point Date

- Select "Initiate Automated Evaluation Set"

### Add Automated Evaluations

Title\*:

Test Automated Rule 7 days prior end date

Method:

Delivery\*:

By Service Dates...

7 days prior to...

Service End Date

Available Evaluation Types:

- Student evaluation of faculty
- Student evaluation of a service/clinic
- Student evaluation of other student (peer)
- Student evaluation of resident
- Faculty evaluation of a student
- Resident evaluation of student
- Patient/staff evaluation of a student

**Initiate Automated Evaluation Set**

On the next screen:

- Select “+Add a Delivery Rule”

### Update Automated Evaluations

Automated evaluations updated

Title\*:

Status:

Delivery\*:

[View Delivery History](#)

[Simulate Delivery](#)

Total Delivered: 0

Last Delivery Date: n/a

[Update Automated Evaluation](#)

#### Delivery Rules

Evaluation Type/Rule Name:	Form:	Services:	Years:	Special:	Status:	Actions:
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(none defined)

[+ Add Delivery Rule](#)

- Select evaluation type
- Submit

#### Delivery Rules

Evaluation Type/Rule Name:	Form:	Services:	Years:	Special:	Status:	Actions:
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(none defined)

Add Evaluation Type:

- ✓ Student evaluation of faculty
- Student evaluation of a service/clinic
- Student evaluation of other student (peer)
- Student evaluation of resident
- Faculty evaluation of a student
- Resident evaluation of student
- Patient/staff evaluation of a student

[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”

Home » Evaluations » Automated Evaluations » Add Delivery Rule

## Add Delivery Rule

Evaluation Type: Student evaluation of faculty

Automated Evaluation: Test Automated Rule 7 days prior end date

Rule Status\*:

Active

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

Rule Name:  
(optional)

Optional, but useful for future reference

Evaluation Form\*:

Clinical Educator

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

Select...

Services

All Services

Kaiser General Surgery

Shift/Ctrl for multiple

Recipient Years

n/a  
Year 1  
Year 2  
Year 3  
Year 4

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

Notes:  
(optional)

Special Options:  
(optional)

(none)

Unless requiring a signature, keep special options as “(none)”

Add Delivery Rule

Now you can simulate delivery to ensure evaluations are delivered according to the criteria you selected.

- Select “Simulate Delivery”

**Delivery rule added**

Title\*:

Status:

Delivery\*:

Total Delivered: 0

Last Delivery Date: n/a

**Delivery Rules** Review rules you set up

Evaluation Type/Rule Name:	Form:	Services:	Years:	Special:	Status:	Actions:
<a href="#">Student evaluation of faculty</a>	Clinical Educator	(All Services)	1, 2, 3, 4	(none)	Active	<input type="button" value="Simulate"/>

- Review

[Home](#) » [Evaluations](#) » [Automated Evaluations](#) » [Simulate Delivery](#)

## Simulate Delivery

Automated Evaluation:  [\[ SELECT MULTIPLE \]](#)

Date Range\*: (90 days maximum)

Start Date:

End Date:

MM/DD/YYYY

Evaluation Types\*:

Student evaluation of faculty

(at least one type is required)

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.)*