

EVALUATIONS – Manual Delivery

Manual delivery is the simplest way to deliver evaluations. Clerkship Coordinators can pick the evaluation target(s) and the evaluator(s).

INSTRUCTIONS

Manual Delivery

- Select the clerkship site from right side drop down
- From the home page, select the Evaluation tab. Then, select “Deliver Evaluations.”

The screenshot shows the 'Evaluations' page in a web application. The page title is 'SURG 300A - Surgery Core Clerkship - Kaiser-Santa Clara'. The navigation menu includes 'Home', 'Schedules', 'Procedures', 'Evaluations', 'Conferences', and 'Reports'. The 'Evaluations' tab is selected. The page content is divided into several sections:

- Deliver Evaluations:** A button with a checkmark icon, annotated with 'Select for manual evaluation delivery'.
- Queued Evaluations:** A table with columns 'Evaluation Form:', 'Number:', and 'Delivery Date:'. The first row shows '(none)'. An annotation 'Site Specific Clerkship' points to the 'SURG 300A - Surgery Core Clerkship - Kaiser-Santa Clara' dropdown menu at the top right.
- Automated Evaluations:** A table with columns 'Title:', 'Rules:', and 'Status:'. The first row shows '(none)'. An annotation 'Evaluations tab' points to the 'Evaluations' tab in the navigation menu.
- Right Sidebar:** Contains 'Evaluation Forms' (with a 'Modify/Print Form:' dropdown and a '+ New Evaluation Form' button), 'Manage Evaluation Forms', and 'Evaluation Functions' (with links for 'View Completed Evaluations', 'Incomplete Evaluations', 'Outside Evaluators', and 'Evaluation Groups'). An annotation 'Site Specific Clerkship' also points to the dropdown menu in the sidebar.

STEP 1

On this page, select:

- Evaluation Type: who is evaluating who/what
- Selection Method: Individuals (this will be pre-selected)
- Continue

looking here is an easy way to double check you're delivering evaluations to the correct clerkship site

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Home Schedules

Home > Evaluations > Deliver Evaluations - Step 1

Deliver Evaluations - Step 1

Please select the type of evaluation you want delivered and the recipient selection method. ?

Evaluation Type: Selection Method: individuals Continue...

- ✓ Student evaluation of other student (peer)
- Student evaluation of resident
- Student evaluation of faculty
- Student self evaluation
- Student evaluation of a service/clinic
- Student evaluation of course
- Faculty evaluation of a student
- Resident evaluation of student
- Resident/Student/Faculty evaluation of a procedure
- Resident/Student/Faculty evaluation of a conference
- Patient/staff evaluation of a student
- Patient/staff evaluation of faculty/program/hospital
- Learning portfolio evaluation
- Faculty self evaluation

Evaluation Title:		
ation of a student	Cioni, Claire - Patient Care Professionalism	Log of recently delivered evaluations
ation of a student	Cioni, Claire - Patient Care Professionalism	
ation of faculty	Dr. (TEST) Tsukernik, Masha - Clinical Educator	
ation of faculty	Dr. (TEST) Russell, Irina - Clinical Educator	
Cioni, Claire	Student evaluation of faculty	Dr. (TEST) Cioni, Claire - Clinical Educator

- To assign the *Patient Care/Professionalism (RIME)* form to faculty, use the “Faculty evaluation of a student” type
- To assign the *Clinical Educator* form to students, use the “Student evaluation of faculty” type
- To assign the *Patient Care/Professionalism (RIME)* form to residents, use the “Student evaluation of residents” type
- To assign the *Clinical Educator* form to students, use the “Student evaluation of resident” type

**Please note: You will be able to assign reciprocal Clinical Educator evaluations to students at the same time you set-up any of the above evaluations

STEP 2

On this page, select:

- Evaluation Form(s): MedHub will display all active forms based on the Evaluation Type selected on the previous screen
- Select:
 - Recipients: the evaluators, who will receive the evaluation to complete
 - To Evaluate: who will be evaluated

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Deliver Evaluations - Step 2

Evaluation Type: **Faculty evaluation of a student**

Selection Method: Individuals

Evaluation Form(s):

Patient Care Professionalism ↕

[SELECT MULTIPLE]

Only forms associated with the previously selected Evaluation Type will be visible

Select... ?

Shift/Ctrl or Shift/Command to select multiple

Recipient(s):*

(TEST) Brar, Kiran
(TEST) Cioni, Claire
(TEST) Russell, Irina
(TEST) Tsukernik, Masha
Tedesco, Maureen

Shift/Ctrl to select multiple

[Outside faculty](#)

Student(s) to evaluate:*

Cannon, John (3)
Cioni, Claire (0)
Lee, Angela (3) [7/30-8/26]
Mosse, Maia (4) [7/30-8/26]
Nkansah-Mahaney, Nancy (4)

Shift/Ctrl to select multiple

This page also contains several optional settings:

- Notes: (optional) this message will be seen at the top of the delivered evaluation
- Rotation Period: (optional) evaluator will see which rotation period the form applies to, but the evaluation is not tied to the rotation
- Service/Clinic: (optional) evaluator will see which clinic/service the form applies to, but the evaluation is not tied to the service
- Special Options: (optional) keep set to (none) unless you require a signature
 - Electronic Signature: evaluator must provide an electronic signature in order for the form to be completed
 - Anonymous Evaluation: name is completely stripped from evaluation form
 - **Never assign evaluations as Anonymous Evaluation – this option permanently strips the evaluator name from the submitted forms at all levels, including MedHub**
- Reciprocal Evaluation: (optional) option to deliver reciprocal evaluations. For example, when setting up “Faculty evaluation of a student” evaluations to deliver the *Patient Care/Professionalism (RIME)* form, you can also schedule the same faculty to be evaluated by the student(s) using the *Clinical Educator* form.
- Delivery:
 - Immediate
 - On Date or Multiple Dates
 - Specify the exact date(s) the evaluations will be released
 - Delivery just after midnight eastern time on date(s) selected
- Submit

The screenshot shows the settings page for an evaluation form. The fields are as follows:

- Notes:** (optional) - A text input field. A blue arrow points to it with the text: "e.g., 'please contact X if there are any issues with assigned evaluations'".
- Rotation Period:** (optional) - A dropdown menu with "(unavailable)" selected. A blue arrow points to it with the text: "e.g., 'please contact X if there are any issues with assigned evaluations'".
- Service/Clinic:** (optional) - A dropdown menu with "(unavailable)" selected.
- Special Options:** (optional) - A dropdown menu with "(none)" selected. A blue arrow points to it with the text: "* Do NOT select option to make anonymous".
- Reciprocal Evaluation:** (optional) - A section with a checkbox "Disable 'Insufficient Contact' links" (unchecked). Below it is a dropdown menu with "(do not send reciprocal evaluations)" selected. A blue arrow points to it with the text: "Similar to the 'Both' option in E*Value". Below that is another dropdown menu with "(none)" selected.
- Delivery:** - Three radio button options: "Immediate" (selected), "On Date (Queue)", and "Multiple Dates (Queue)".
- Submit** - A button at the bottom, highlighted with a blue border.

STEP 3

The final screen displays the evaluations for a quick review and confirmation before delivery. If any of the exact evaluations have been delivered previously within a 7 day window, it will be flagged as a duplicate and will be unchecked by default.

- Select the “Deliver Selected Evaluations” button to finalize the delivery

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Deliver Evaluations - Step 3

Evaluation Type: **Faculty evaluation of a student**
Evaluation Form: Patient Care Professionalism

Delivery Date: 07/27/2018 (immediate)

STANDARD MATCHES

<input type="checkbox"/>	Recipient	Evaluation
<input type="checkbox"/>	Dr. (TEST) Cioni, Claire	Cioni, Claire - Patient Care Professionalism ⚠ Duplicate Delivery
<input checked="" type="checkbox"/>	Cioni, Claire (reciprocal)	Dr. (TEST) Cioni, Claire - Clinical Educator

Duplicate evaluations are unchecked by default and will not be delivered unless you manually check the box

The delivery process may take several minutes. Don't click submit button below more than once or refresh the page.

Deliver Selected Evaluations Deliver additional evaluations of the same type

You can also remove evaluations from the queued delivery up to the date the evaluations are scheduled to be delivered.