Automated Evaluation Delivery

Automated evaluation delivery allows Administrators to send out one or more evaluation types, using the 'by schedule' method described above, then instructing MedHub to repeat that delivery throughout the year. This method of delivery places the focus of the Administrator on making certain the schedule assignments for Trainees and Faculty are accurate - this takes the focus away from evaluation delivery. The rationale is; if the schedule is correct and the automated evaluation rules are set up properly, an Administrator would need to spend very little time on actual evaluation delivery.

This is an excellent way to deliver 360 degree evaluations as well.

Add Automated Evaluation Delivery
Admin. **Evaluations > Automated Evaluations > Add Automated Evaluations**

Click on 'Add Automated Evaluation'

This is where basic information can be defined around the automated evaluation:

Title: Any label to define what this rule is. Examples:
Faculty of a resident 360 degree evaluation

Delivery:

1. **By rotation periods** — Delivery will be by rotation period. Administrator defines the actual number of days before or after the end of the rotation automated delivery is to take place
2. **By dates of activity** — Delivery will be by dates of activity. This is a preferred method when there are many Trainees on the same service that spans multiple contiguous rotation periods. By dates of activity would result in one evaluation after the activity has been concluded rather than multiple evaluations for the same activity at the end of each rotation period. **Note:** If the same service is scheduled twice for a trainee with a gap of 10 or less days, this will be treated as the same activity and one evaluation will be sent.
3. **On specific dates** — Administrator determines the delivery date by entering MM/DD. Use Automated Evaluations to deliver evaluations on specific dates, not dates based on rotation periods. Use to create certain evaluations, such as self evaluations, an evaluation about the program/hospital, or an evaluation that the program director should fill out about each trainee twice a year, and then create some rules to deliver these forms through Automated Evaluations on specific dates selected. If this is a form that the Program Director is filling out about Residents, ensure the form is "Faculty evaluation of a Resident". Set up an Automated Evaluation rule to deliver on a specific day, select that evaluation type, and the form you made. There will then be an option to have it delivered to "Program Director of All Active Residents".

Update Automated Evaluations

| Evaluation Type: | **Faculty evaluation of a resident** |
| Automated Evaluation: | Semi-Annual Evaluations |

Rule Status*: [Active ▾]

Rule Name:
(optional) [   ]

Evaluation Form*: [Director of Resident 2017-2018 ▾]

Select... [☑ Program Director of All Active Residents]

Notes:
(optional) [   ]

Special Options:
(optional) [(none) ▾]

[Submit]

Once the delivery criteria has been defined for this automated delivery rule, Administrators can move to the next step and define what is to take place at the trigger defined above.

Click on the Automated evaluation just created.

Click on the automated evaluation just created to begin adding one or more delivery rules. Each delivery rule is no more than the 'by schedule' method described above created one or more times for each type of evaluation delivery instance defined by the rule.

In the example above, there are four different types of automated evaluations set to be delivered 3 days prior to the end of all rotations (if using monthly rotation periods that would be 12 times per year). The following evaluations would be delivered automatically each month:
- Resident evaluation of a peer
- Resident evaluation of a faculty member
- Resident evaluation of a service
- Faculty evaluation of a resident

For a large program, this could result in a very large number of evaluations each month. Therefore, MedHub allows Administrators to simulate each delivery instance to confirm the schedule is accurate, and therefore, the matches made by MedHub will be accurate.