

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

The screenshot shows the 'Evaluations' page in the MedHub system. The breadcrumb trail is 'Home > Evaluations'. The page title is 'Evaluations'. Below the title, there is a sub-header 'Evaluations' and a note: 'Use the utilities below to draft evaluations, select participants, and deliver the evaluations. To get started, visit the [Help Section](#).' There are two main sections: 'Deliver Evaluations' and 'Automated Evaluations'. The 'Automated Evaluations' section contains a table with the following data:

Title:	Rules:	Status:
ED rotation (IM)	2	Active
Orthosuitation Evaluation	1	Active
Test	0	Draft
Test	1	Draft

Below the table is a button labeled 'Add Automated Evaluations', which is highlighted with a red arrow. To the right of the table is a sidebar with the title 'Evaluation Forms' and various links such as 'Manage Evaluation Forms', 'View Completed Evaluations', 'Incomplete Evaluations', 'Residents Identify Supervisors', 'Outside Evaluators', 'Off-Program Evaluators', 'Evaluation Groups', 'Locked Questions', 'Export Evaluation Data', 'Evaluation Trends', 'Milestones Summary', 'Faculty/Outside Service & Clinic Assignments', and 'Evaluation Coverage Matrix'.

Click on 'Add Automated Evaluation'

The screenshot shows the 'Add Automated Evaluations' form. The breadcrumb trail is 'Home > Evaluations > Add Automated Evaluations'. The form has the following fields:

- Title*:
- Delivery*:
-

At the bottom of the form is a green 'Submit' button.

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 <input type="button" value="v"/>

Rule Name: (optional)	<input type="text"/>

Evaluation Form*:	Director of Resident 2017-2018 <input type="button" value="v"/>

Select...	<input checked="" type="checkbox"/> Program Director of All Active Residents

Notes: (optional)	<input type="text"/>
Special Options: (optional)	(none) <input type="button" value="v"/>

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.

Home » Evaluations » Update Automated Evaluations

Update Automated Evaluations

✔ Delivery rule added

Title:

Status:

Delivery*:

Total Delivered: 0
Last Delivery Date:n/a

Delivery Rules

Evaluation Type/Rule Name:	Form:	Services/Clinics:	Levels:	Special:	Status:	Actions:
Resident evaluation of other resident (peer)	Resident Evaluation 2016	(5 services)	(All Levels)	Electronic Signature	Active	<input type="button" value="Simulate"/>
Resident evaluation of faculty member	AMBULATORY - ADDICTION CLINIC (2014-2015) Res of Att	(All Services)	(All Levels)	Electronic Signature	Active	<input type="button" value="Simulate"/>
Resident evaluation of a service/clinic	Chase Immersion Specialty Office Rotation Evaluation - Resident of various offices	(All Services)	(All Levels)	Electronic Signature	Active	<input type="button" value="Simulate"/>
Faculty evaluation of a resident	Ambulatory Community Office (Preceptor of Resident)	(All Services)	(All Levels)	Electronic Signature	Active	<input type="button" value="Simulate"/>



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.