

Manual Delivery of Evaluations ('by individual')

Manually delivering evaluations by individuals is the simplest method for delivering evaluations in MedHub.

Manual delivery by individuals allows the Administrator to hand pick the evaluation target(s) and evaluator(s).

To begin the manual delivery by individuals process, go to: **Home > Evaluations > Deliver Evaluations**

After clicking on the 'Deliver Evaluations' button, the screen will show 'Step 1' of the delivery process. Select the Evaluation Type and select 'Individuals' from the 'Selection Method' drop-down. Next, click 'Continue' to move to the next page.

Recipient:	Type:	Evaluation Title:	Rotation:	Service:	Clinic:	Issue Date:
Dr. Aaron, Dovie	Faculty evaluation of a resident	Dr. Barclay, Billye - Mini-CEX History (DEV)	--	--	--	8/17/2016
Public (Link)	Patient/staff evaluation of resident	Dr. Barclay, Billye - Cooney Firm Multi-Source Evaluation YPC	--	--	--	8/14/2016
Dr. Aaron, Dovie	Faculty evaluation of a resident	Dr. Akins, Carola - TEST	--	--	--	7/28/2016

Next, the screen will display 'Step 2' of the delivery setup. The page consists of the following:

1. **Evaluation Type** — The evaluation type carries over from the selection made in Step 1 of the delivery process.
2. **Selection Method** — The selection method carries over from the selection made in Step 1 of the delivery process.
3. **Evaluation Forms** — MedHub will display all active and final form types that satisfy the selected criteria. For example, if a faculty evaluation of a resident form type was selected, only faculty of resident forms will appear in the pull-down menu. Click the 'Select Multiple' link to deliver multiple evaluation forms.
4. **Select** — Next, select the 'Recipient(s)' (the evaluator(s)) and the '[Target] to evaluate' (the evaluatee(s)) for the delivery. To select multiple evaluators and evaluatees, hold down the 'Shift' or 'Control' ('Command' if on a Mac) keys.
5. **Notes** — The optional notes box offers the opportunity to add a note that will appear at the top of the evaluation form. The evaluator(s) will be able to see the note.
6. **Rotation Period** — The optional rotation period drop-down allows the rotation period to be indicated for which the evaluation form will apply to.

Note: When manually delivering by individual, and not the schedule, the form will not be tied to the rotation period for data collection purposes. If a rotation period is selected here, it will appear for the

evaluators when they are completing the form so they know which rotation period the form applies to.

7. **Service/Clinic** — The optional service/clinic drop-down allows the service/clinic to be indicated for which the evaluation form will apply to.

Note: When manually delivering by individual, and not the schedule, the form will not be tied to the service/clinic for data collection purposes. If a service/clinic is selected here, it will appear for the evaluators when they are completing the form so they know which service/clinic the form applies to.

1. **Special Options** — The optional special options drop-down allows the selection of an electronic signature requirement or allows the form to be anonymous.

If an evaluation form is identified as anonymous, once the evaluator completes the form the evaluator's name is completely stripped from the evaluation form.

If a form is identified as anonymous within the delivery process, this selection cannot be removed. Once the evaluator completes an anonymous evaluation form, the evaluator's name is completely disassociated from the form. Not even MedHub's team can find out the name of the evaluator.

Anonymity is different in MedHub than Confidentiality. By design, MedHub protects the **confidentiality** of certain users in MedHub. Regardless of the settings set in MedHub, Faculty will never see the names of their Trainee evaluators and Trainees will never see the names of their peer, staff or patient evaluators. Anonymity strips ALL identifying information from the evaluation and cannot be recovered.

Also, the special options offers a check the box to 'Disable Insufficient Contact Links' so that the evaluator will not have the option to delete the form due to insufficient contact. By default, all delivered evaluation forms have a link at the top, 'Insufficient contact to evaluate', that can be clicked if the recipient of the evaluation form did not interact with the target. This check box will turn this link off (this function is rarely used and there are settings within Program Settings >>> Evaluations that more effectively manage this function).

1. **Reciprocal Evaluation** — The optional reciprocal evaluations drop-down allows the option to deliver reciprocal evaluations at this step. Selecting a reciprocal evaluation for the evaluation type: 'Faculty Evaluation of a Resident' means an equal number of 'Resident Evaluation of Faculty' evaluations for the same people selected above will also be delivered. The reciprocal evaluations drop-down offers the option to select from all active and final forms that are reciprocal to the form selected for the delivery in Step 1 of the delivery process. If the reciprocal form is selected for delivery, there will also be special options to make an electronic signature required or to make the form anonymous (do not use).
2. **Delivery** — The delivery can be set-up to be 'Immediate', 'On Date' (queue), or 'Multiple Dates' (queue). If the evaluation is set-up for immediate delivery, it will be delivered right after Step 3 of the delivery process is completed. If the evaluation is set-up for an 'On Date' or 'Multiple Dates' delivery, the forms will be delivered shortly after midnight on the date(s) selected and the forms will remain in queue until then.

When evaluations are actually delivered, all recipients will receive an email notifying them of a delivered evaluation and an alert on their MedHub portal page.

When the selections in Step 2 have been made in the delivery set-up, click 'Submit' to move to the next page.

Deliver Evaluations - Step 2

Evaluation Type: **Faculty evaluation of a resident**
Selection Method: Individuals

Evaluation Form(s): Ambulatory Addiction and Recovery Clinic (Att of Resident) ▼

[SELECT MULTIPLE]

Select... ?

Recipient(s)*	Resident(s) to evaluate.*
Aaron, Dovie	Akins, Carola (1)
Acker, Tara	Artis, Britany (1)
Alley, Hyo	Barclay, Billye (2)
Alvarado, Amos	Beavers, Marisol (3)
Alvarado, Kareen	Benton, Jannette (3)
Andersen, Jannet	Bolton, Otha (1)
Arellano, Ling	Borden, Tennille (1)
Ayala, Merle	Boykin, Jacqui (2)

Shift/Ctrl to select multiple Shift/Ctrl to select multiple

[Off-program faculty](#) | [Outside faculty](#) [Off-program residents](#) | [Outside residents](#)

Notes: (optional)

Rotation Period: (optional) (unavailable) ▼ ?

Service/Clinic: (optional) (unavailable) ▼ ?

Special Options: (optional) (none) ▼

Disable 'Insufficient Contact' links

Reciprocal Evaluation: (optional) (do not send reciprocal evaluations) ▼

Delivery:* Immediate
 On Date (Queue)
 Multiple Dates (Queue)

Submit 

Next, the screen will display 'Step 3' of the delivery setup.

This screen displays the actual matches based upon the selection criteria and allows a quick review and confirmation before any evaluations are delivered. If any of the exact same evaluations have been delivered previously within a 14 day window, it will be flagged as a duplicate and will be unchecked by

default. A duplicate evaluation can still be delivered, but the box must be checked next to the form to do so.

If evaluations have been queued for delivery at a future date, Administrators can always remove evaluations from the queued delivery up to the date the evaluations are scheduled to be delivered. Evaluations remain listed in the queue on your main 'Evaluations' tab until they are delivered.

The 'Deliver Selected Evaluations' button or 'Queue Selected Evaluation' button must be selected to finalize the delivery or queuing of the evaluation forms.

Deliver Evaluations - Step 3

Evaluation Type: **Faculty evaluation of a resident**
Evaluation Form: Ambulatory Addiction and Recovery Clinic (Att of Resident)
Delivery Date: 08/17/2016 (immediate)

STANDARD MATCHES

Send:	Recipient:	Evaluation:
<input checked="" type="checkbox"/>	Dr. Aaron, Dovie	Dr. Akins, Carola - Ambulatory Addiction and Recovery Clinic (Att of Resident)
<input checked="" type="checkbox"/>	Dr. Aaron, Dovie	Dr. Artis, Britany - Ambulatory Addiction and Recovery Clinic (Att of Resident)
<input checked="" type="checkbox"/>	Dr. Acker, Tara	Dr. Akins, Carola - Ambulatory Addiction and Recovery Clinic (Att of Resident)
<input checked="" type="checkbox"/>	Dr. Acker, Tara	Dr. Artis, Britany - Ambulatory Addiction and Recovery Clinic (Att of Resident)

 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

