

USER MANUAL – EVALUATION SUMMARY REPORT

TARGET AUDIENCE: ADMINISTRATORS

Updated February 12, 2020

EVALUATION REPORTING – SUMMARY REPORT

An export button has been added to the Evaluation Dashboard. The export will pull all selected data based in filters into an Excel file. This feature is available for Program Administrators and Program Directors.

- To filter on the data you would like to export, click on the “All Evaluations” button:

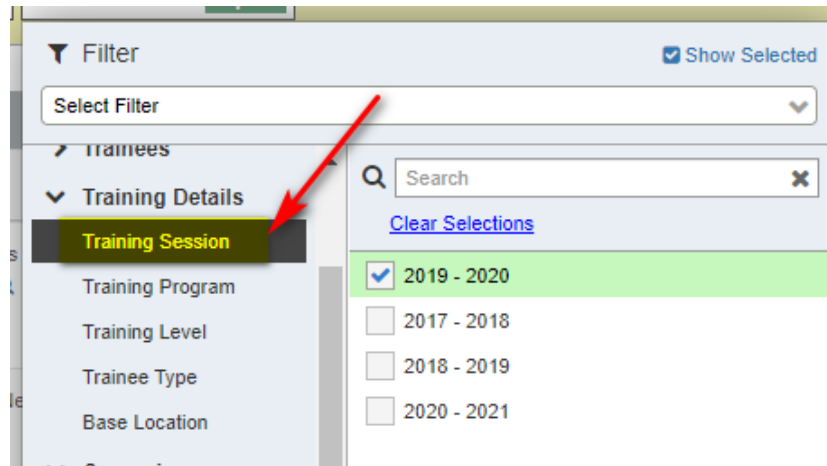
The screenshot shows the 'Evaluation Schedule' dashboard. At the top, there are tabs for 'Evaluations Setup', 'Evaluations', and 'Distribute Evaluations'. Below the tabs, there is a section titled 'Evaluations' with a sub-section 'All Evaluations' highlighted by a red box and a red arrow. To the right of this section is a 'Send Evaluation(s)' button. Below this, there are two main sections: 'CBME Evaluation' and 'Learner ITER Evaluation'. The 'Learner ITER Evaluation' section contains a table with columns for Activity, Start Date, End Date, Evaluation, Trigger, Source, Created By, Evaluator, Evaluatee, Alerts, Status, Action, Expiry Date, and Feedback. Two rows are visible in the table, both with a 'Completed' status.

- Select the filters that you would like to see.

Example: **Expired evaluations for supervisor Dr. Marrin during the 2019-2020 training session:**

The screenshot shows the 'Evaluations' dashboard with filters applied. The 'Training Details' section has 'Training Session' set to '2019 - 2020'. The 'Supervisors' section has 'Supervisor' set to 'Marrin, Michael L'. The 'Evaluations' section has 'Evaluation Type' set to 'Learner ITER Evaluation' and 'Evaluation Status' set to 'Expired'. A red box highlights the 'Show Selected' button in the top right corner of the filter panel, with a red arrow pointing to it. A red callout box with the text 'click this button to view all selected filters' points to the 'Show Selected' button. The filter panel also shows a list of filters including Training Level, Trainee Type, Base Location, Supervisors, Evaluations, Eval Form, Trigger Type, Evaluation Status, Template Status, and Trigger Date. The 'Supervisors' and 'Evaluations' filters are highlighted in yellow. At the bottom of the filter panel, there are 'Clear', 'Save', 'Apply', and 'Close' buttons.

NOTE: The training session filter can be found under “Training Details”:



3. Select the forms that you would like to export. Click the top checkbox to select everything underneath, or check the individual checkboxes if you only require certain forms.

Home > Evaluation Schedule

Evaluations Setup | Evaluations | Distribute Evaluations

Evaluations

Training Details: Training Session **2019 - 2020** Send Evaluation(s)

Supervisors: Supervisor **Marrin, Michael L**

Evaluations: Evaluation Type **Learner ITER Evaluation**

Template Record
 Hidden Evaluation
 Hidden Template
 Show Hidden records Show Templates Total: 13

<input type="checkbox"/>	Activity	Start Date	End Date	Evaluation	Trigger	Source	Created By	Evaluator	Evaluatee	Alerts	Status	Action	Expiry Date	Feedback
<input checked="" type="checkbox"/>	Neonatal Perinatal Regions Systems -McMaster University Medical Centre	16-Dec-2019	12-Jan-2020	ITER - Neonatal Perinatal Medicine - NICU NPRS	End of Rotation	Scheduled	Automatic	Marrin, Michael L	Balhareth, Yasser		Pending	Start	20 days 03-Mar-2020	
<input checked="" type="checkbox"/>	Neonatal Perinatal Regions Systems -McMaster University Medical Centre	16-Dec-2019	12-Jan-2020	ITER - Neonatal Perinatal Medicine - NICU NPRS	End of Rotation	Scheduled	Automatic	Marrin, Michael L	Alsaid Ahmad, Hussain Ali		Pending	Start	20 days 03-Mar-2020	
<input checked="" type="checkbox"/>	Neonatal Intensive Care Unit - Level 3 Nursery-McMaster Children's Hospital	01-Dec-2019	01-Dec-2019	ITER - Neonatal Intensive Care Unit - Level 3 Nursery	Start of Rotation	Single-Send	Dragusica, Jessica	Marrin, Michael L	Alhussin, Walid		Completed	Required Evaluations View		
<input checked="" type="checkbox"/>	Neonatal Intensive Care Unit - Level 3 Nursery-McMaster Children's Hospital	19-Dec-2019	16-Dec-2019	ITER - Pediatrics - Neonatology	End of Rotation	Scheduled	Automatic	Marrin, Michael L	Alrowayshed, Mohammed		Expired	View	05-Feb-2020	

Click here if you would like to select ALL ITERs.

Click on the individual forms if you would like to select certain evaluations

4. Click on the 3 dotted icon where you will see a dropdown option called "Export Evaluations".

5. The export will open in excel with all fields found within the evaluation dashboard.

Example of export:

A	B	C	D	E	F	G
Eval Type	Activity	Location	Start Date	End Date	Evaluation	Trigger
Learner ITER Evaluation	Neonatal Intensive Care Unit - Level 3 Nursery	McMaster Children's Hospital	23-Sep-2019	17-Nov-2019	ITER - Clinical Neonatology - NICU	End of Rotation
Learner ITER Evaluation	Neonatal Intensive Care Unit - Level 3 Nursery	McMaster Children's Hospital	19-Nov-2019	16-Dec-2019	ITER - Pediatrics - Neonatology	End of Rotation

QUESTIONS?

If you have any questions or difficulties with this process, please contact MedSIS at medsis@mcmaster.ca