User Manual – How to Monitor/Manage Evaluations

Target Audience: Administrators

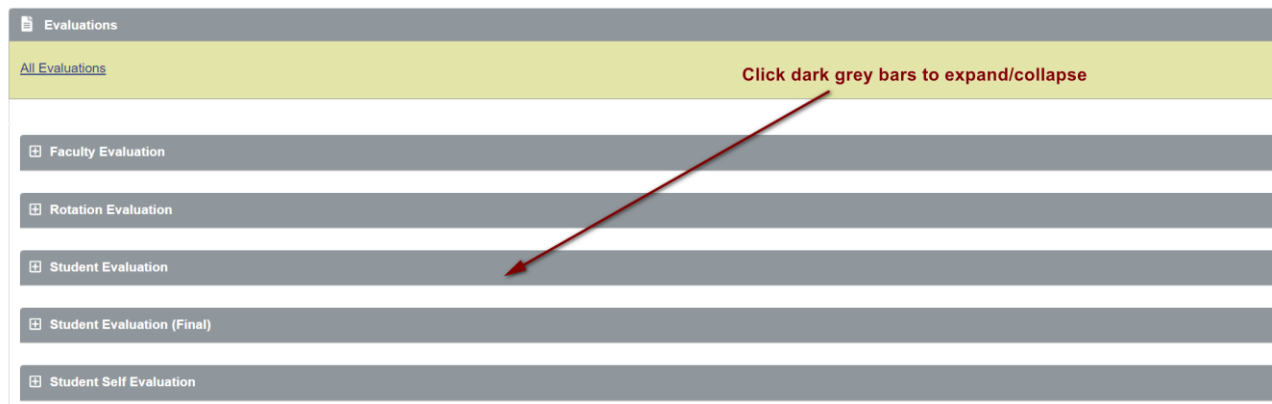Updated November 14, 2023

Evaluation Schedule

All evaluations that have been triggered can be found in the evaluation schedule.
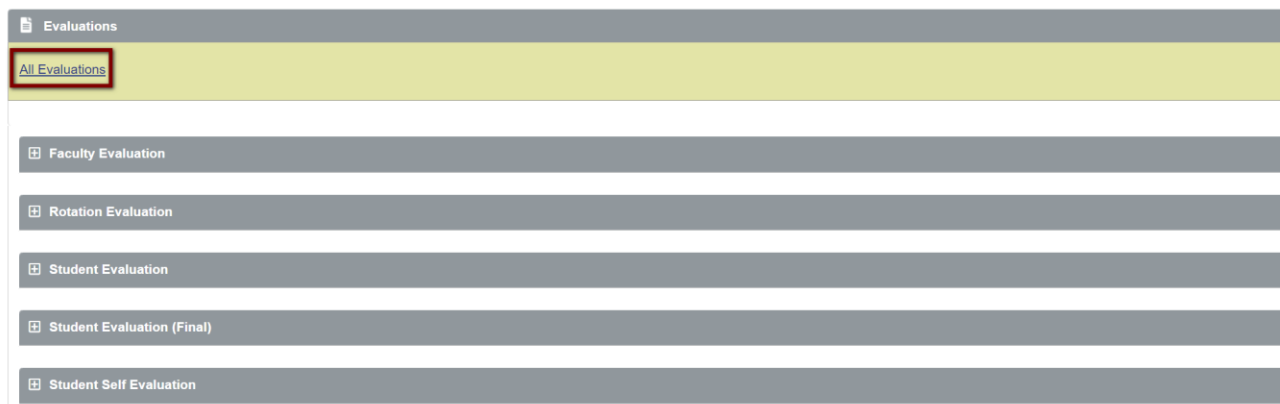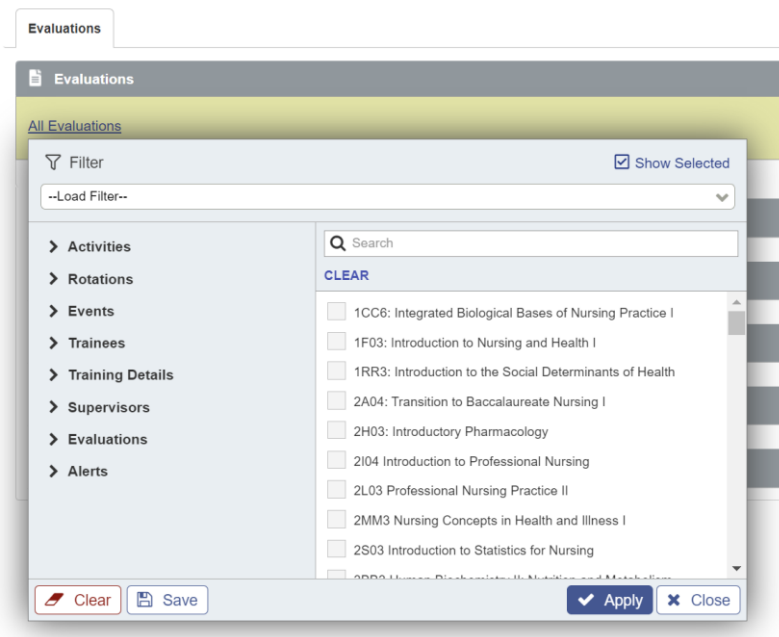

Evaluation Type Categorization

Evaluations are categorized by type. Each evaluation type has its own section that can expand and collapse. To expand or collapse, click on the dark grey bar.

Evaluation Schedule Filters

Use the filters to refine which evaluations are appearing.

Most useful filters for Midwifery

- **Rotations > Rotation**
  - Search for evaluations by course
- **Trainees > Trainee Name**
  - Search for evaluations by student name
- **Training Details > Training Level**
  - Search for evaluations by training level/year of study
- **Supervisors > Supervisor**
  - Search for evaluations by supervisor name
- **Evaluations > Eval Form**
  - Search for evaluations by evaluation form name
- **Evaluations > Eval Type**
  - Search for evaluations by evaluation type
- **Evaluations > Evaluation Status**
  - Search for evaluations by evaluation status (complete, expired, etc.)

Evaluation Options

Print Evaluations

To print evaluations, locate the three dots in the top right-hand corner. Select "Print Evaluations" from the menu and then one of the two options.
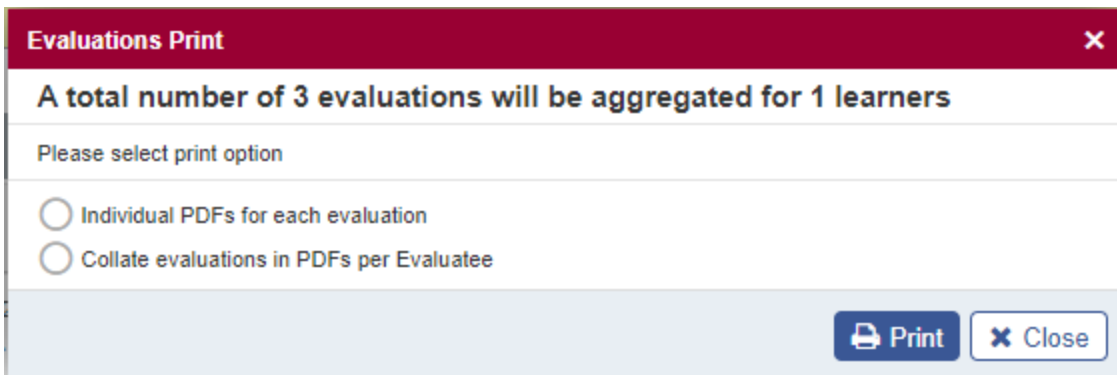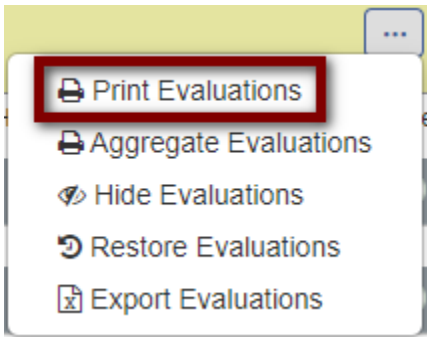
### Option A: Individual PDFs for each evaluation
- Will pull a PDF version of every selected evaluation into a zip file.
- Each individual evaluation can then be opened from the zip file.

Option B: Collate evaluations in PDFs per Evaluatee
- Will pull one PDF version including all selected evaluations.

Aggregate Evaluations

To create summary reports of evaluations, locate the three dots in the top right-hand corner. Select "Aggregate Evaluations" from the menu and then one of the two options.
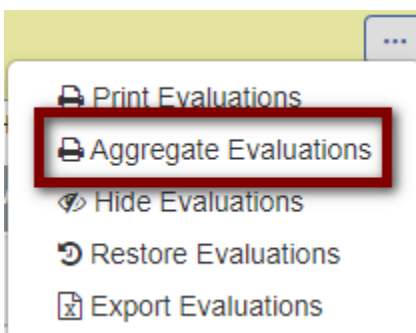
Option A: Aggregate Evaluations per Evaluatee

This creates a Summary of Daily assessments for a single learner, including the rating scales chosen for each and their mean value. It is not sorted by course/rotation.

Option A: Aggregate Evaluations per Evaluatee by Course/Rotation

This creates a Summary of Daily assessments for a single learner, including the rating scales chosen for each and their mean value. It is sorted by course/rotation.

Unlocking Evaluations

If an evaluation is completed, but needs revisions, certain users can unlock it. Do so, locate the arrow icon next to "view". Click the arrow and then "Unlock".

The user can leave comments, if needed. Once done, click "Unlock".

A pop-up message will come up informing the user that the evaluation was unlocked successfully.

This will send the form back to the original evaluator.

QUESTIONS?

If you have any questions or difficulties with this process, please submit them through our ticketing system.

To submit a ticket, please visit medsishelp.mcmaster.ca

User Guide: How to Submit a Ticket