Evaluation Workflow

Evaluations can be finalized and approved at two different levels - at the **Campus Level** or at the **Course Template** level.

Whether you set up the Evaluations to be finalized at the Campus level or the Course Template level will depend on your institutional preferences and the hierarchy within your institution for how Evaluations are carried out.

The workflow changes slightly depending on your internal resources (centralized, decentralized) and decisions that are made at your institution about whether to consolidate/summarize/review reports before sending them out.

Another consideration in determining the level of approval could be the Type of Evaluation - Peer Evaluation, Course Evaluation, Clinical Evaluation, etc.

Option 1: At the Campus level

Step 1: An Evaluator of Record (at the Campus level) reviews the Evaluations and submits them for final review by the Course Director at the Course Template level. For more information refer to [Assign Admin Evaluator of Record](#)

We often see institutions using this option if there are Course Evaluations for multiple sites (campuses) that need to be reviewed at the Template level. Or for Peer Evaluations. Or for Clinical Evaluations where the Preceptor fills in the Evaluation of the Student, an Evaluator of Record reviews/submits it and then the Clerkship Director takes a final look before approving the Evaluation.

This two-step process enables a system of checks and balances because there is more than one pair of eyes reviewing the Evaluations. On the flip side this requires slightly more time and resources.

Option 2: At the Course Template level

Step 1: An Evaluator of Record reviews, submits, and summarizes (approves) the Evaluations at the Course Template level. Review, submission and approval is a one-step process here. This is quick and one designated person handles them.

We often see institutions using this option for Course Evaluations for didactic courses, where an Administrator submits the Evaluations and summarizes them. Subsequently the Faculty can see the Course Evaluations that Students have completed for the Course they taught.

> ⚠️ **NOTE**: You will need to assign people as Course Directors in order for them to act as the Evaluator of Record. You can assign an Administrator as a Course Director for the purpose of these Evaluation submission/approval tasks. For detailed instructions on how to assign an evaluator of record, see [How to assign the Evaluator](#).
>
> And just because you assign them as Course Directors for the Evaluation workflow, they will not be automatically assigned as Course Directors for the Course or any particular Section of that Course.

Navigation from Course Screen

Path: Home > Courses > [Course Screen] **> Campus Level or Course Template Level**

Course Directors can quickly navigate to the **Campus Level (1)** or the **Course Template (2)** from their view of the Course Screen

Campus Level

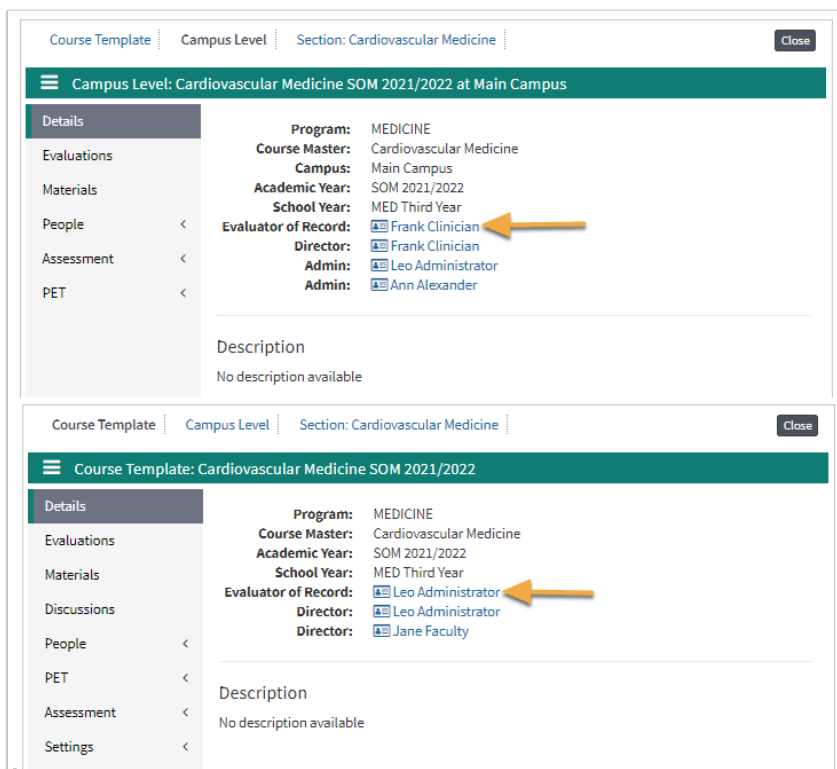## Course Template Level

Campus Level/ Course Template

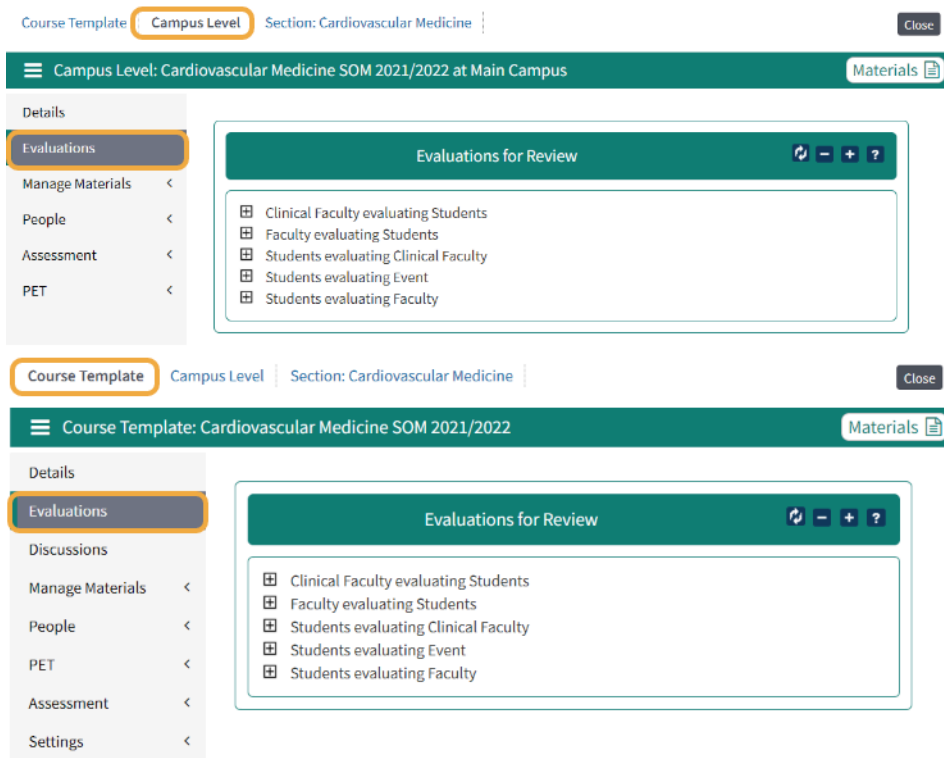At either level, select **Evaluations** and select Evaluations.

Evaluations for Review

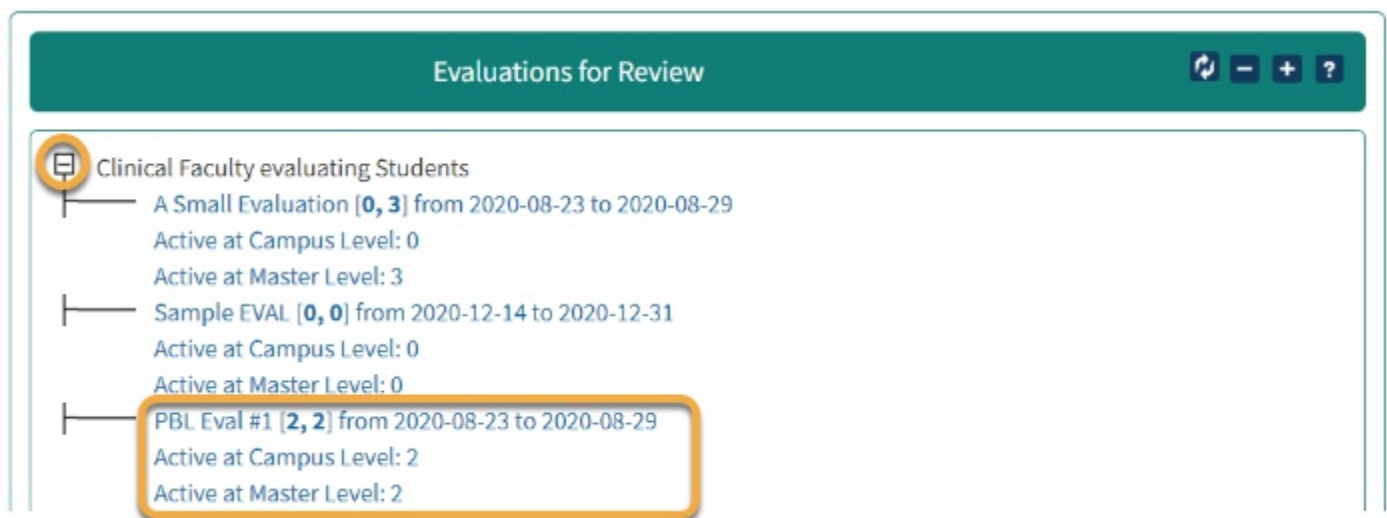This lets you manage your Evaluations that need to be summarized into a grade.
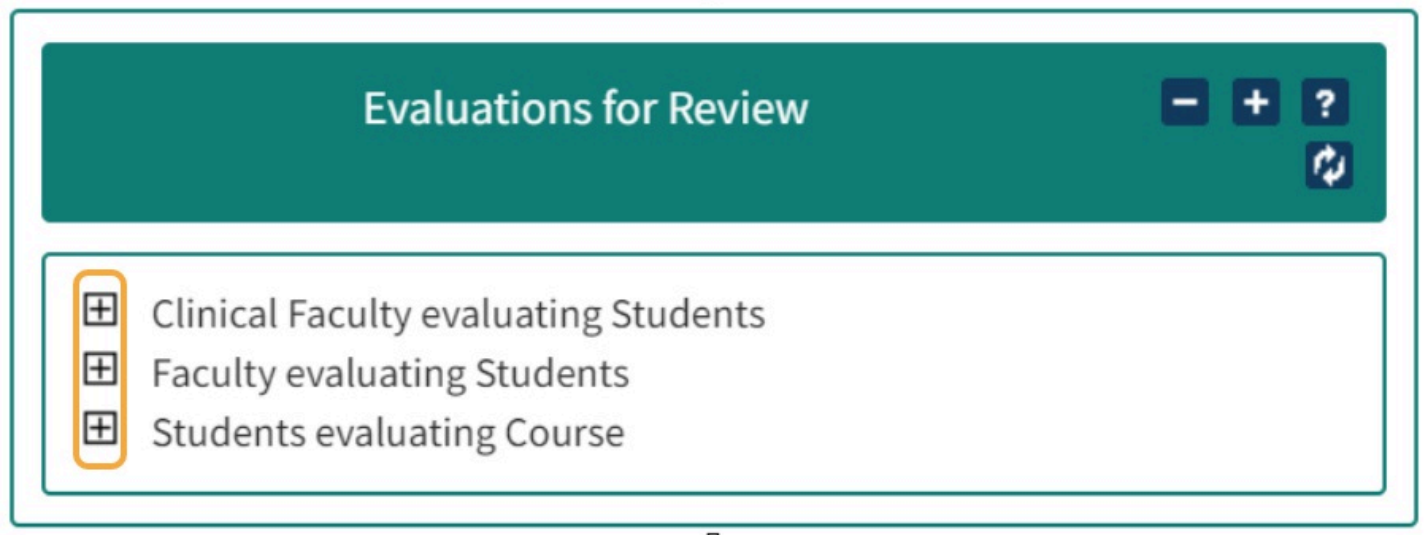
- Expand the view by clicking the + (plus sign).

Locate Evaluation

Creating and Approving Evaluation Summaries

From this screen, you can create a summary evaluation of the student, faculty, clinical faculty, course, or event being evaluated based on the averaged responses of the selected evaluators.

- When comments in text type questions, all comments will be summarized and presented.

The list of Evaluations is color coded in the following way:

- **Green** = **New** Evaluations
- **Purple** = **Open** Evaluation. Summary evaluation has been opened but not approved.
- **Gray** = **Submitted** at the campus level, but not yet approved by the Course Template Evaluator
- **Red** = **Approved** by Course Template Evaluator
- **Orange** = **Returned** to the Campus level by the Course Template Evaluator for further review
- **Blue** = **Fully submitted to the gradebook** by Course Template Evaluator.
- **White** = **Status Errors**. Re-editing these records should fix the issue.

All Summary Evaluations with a particular status (except New) may be downloaded in a zip file containing a PDF file for each Evaluation. Do this by clicking the PDF icon in the top right corner.

Click an individual evaluatee to update and submit a summary evaluation based on the evaluators that you have selected.

1. To Approve a Summary Evaluation, click **Approve**
2. To view Summary Evaluation options, click the **Options** drop down
3. To exit the Summary Evaluation, click **Close**
4. The Summary Evaluation progress bar will update as the Evaluator of Record completes the Summary Evaluation
5. To view the Next Page of the Evaluation, select **Next Page**

To learn more about the evaluation approval process. [View this article](#).

The Evaluation shows that it has been submitted.

> 💡 **TIP:** If you have a very large number of Evaluations to summarize for a large number of Students, you can use the F**ilter option** in the upper left hand corner.

![Leo logo] **Leo User Guide**

This option will set you select one or more Evaluations statuses to view, such as **New** and **Open** Evaluations, or **Submitted** evaluations.

The filter option will also show you a list of the currently selected filters. If no filters are selected, then all evaluations will be displayed.

Bulk Approval

You can approve all completed and/or summarized evaluations in bulk via the "Approve all Submitted" button. Any incomplete evaluations that are not already a part of an evaluation summary will not be approved. To include incomplete evaluations, you must select them to include in a summary evaluation open the summary evaluation by clicking on the evaluatee's name.
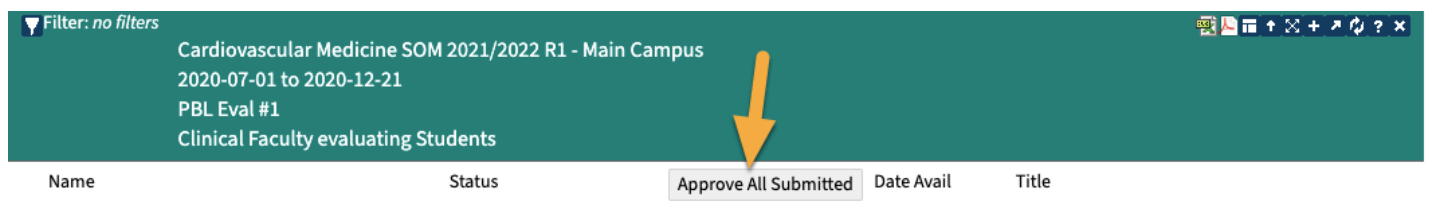
Workflow Icons Screen
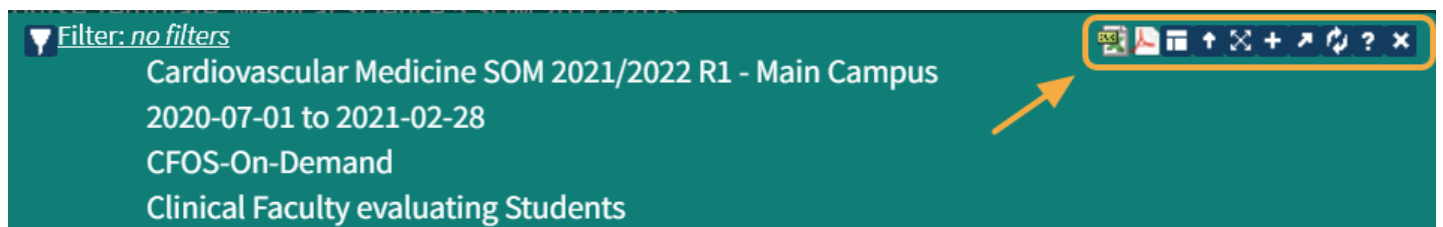
Workflow icons on the Evaluation summary screen are in the upper right hand corner:

- **Excel**: Create a CVS file of all individual Evaluations.
- **PDF**: Create a PDF file of all Evaluations.
- **Gradebook**: Opens Gradebook for the course.
- **Up Arrow**: Exports all Approved evals to Gradebook, only available for Students evals.
- **Four Diagonal Arrows**: Summary evals with no activity.
- **Plus**: Summary of Evaluators with no activity.
- **Diagonal Right Corner Arrow**: Opens Course Screen.
- **Refresh**: Reloads summary to include the latest data.
- **Question Mark**: Screen help.
- **X**: Closes the screen.

The difference between Campus and Course Template submissions

NOTE: If the submit button is clicked at the **Campus Level:**

- The Evaluation status will be considered **Submitted.**
- Then the **Course Template** Evaluator of Record will still need to (1) review the Evaluation and (2) approve the Evaluation.

NOTE: If the submit button is clicked at the **Course Template.**

- The Evaluation status will go straight to **Approved** status.

💡 Please refer to this article for further detail instructions on Approving and Submitting Evaluations