Summarize and Approve Evaluations

Evaluations can be reviewed and approved at two different levels in the System. You can approve Evaluations at the **Campus Level** or at the **Course Template level.**

Whether you set up the Evaluations to be reviewed and summarized at the Campus level (followed by a separate review and approval at the Course Template level) will depend on your institutional preferences and how Evaluations are approved within your institution.

For example, you may wish to designate a person at each Clinical Campus to review Evaluations for a particular Clerkship at that Campus level and then have the Clerkship Director review and approve at the Course Template level.

Another consideration in determining who is designated the Evaluator of Record and whether you utilize both the Campus and Course Template levels of approval might be related to the Type of Evaluation - Peer Evaluation, Course Evaluation, Clinical Evaluation, etc.

Based on whether you opt for one level or two levels, the **Evaluator of Record** can be two different people/steps at the Campus and Course Template levels. Or the Evaluator of Record can be one person/one step at the Course Template level.

If your institution only approves Evaluations at the Template Level, this can be done without switching Campus/Template Levels.

Once an Evaluator of Record has been assigned, that person must follow the steps outlined below to approve and submit Evaluations.

💡 **TIP:** For detailed instructions on how to Assign an Evaluator of Record, see How to Assign an Evaluator of Record.

❗ **Warning:** In order for Evaluation scores to be pushed to the Gradebook, they must be approved at the Course Template level.

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

OR

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

Campus Level

To get to the Template Level, click the on the **Course Template** link.

Template Level

Evaluations

1. Click the **Evaluations**

Expand the Evaluation types

Located Evaluation

- Click the Evaluation link to open

Review and Summarize

Green Evaluations (not yet reviewed), check the box for the Evaluations you would like to review.

- **Select all Active Evaluators**: Selects all active Evaluators for this Evalutee.
- Or check the **Select for summary** box to review individual evaluators one at a time.

Evaluation Color Code

This screen displays the list of Students enrolled in the course. Below each Student's name is the list of evaluators that have evaluated that Student.

Each Student's Evaluation status is color-coded for easy readability. The following colors are defined below:

- **Green**: New Evaluation.
- **Purple**: Open Evaluation. Record has been opened by user but not submitted.

- **Gray**: Evaluation has been submitted but has not been approved by the Course Template Level Admin Evaluator yet.
- **Red**: Evaluation has been approved by Course Template Level Admin Evaluator.
- **Orange**: Evaluation has been returned by the Course Template Level Admin Evaluator for further review.
- **Blue**: Evaluation has been fully approved and submitted by Course Template Level Admin Evaluator.
- **White:** Evaluation has status errors. Re-editing these records should fix the issue.

Select Student

- Click the name of the Student to review Evaluation.

Summary of Evaluation

On this screen, you will see a summary of the Student's Evaluation.

- In the left column is the question or prompt for each item.
- The radio buttons to the right are the options the evaluators can pick based on their impression/opinion of the Student.
- The number below the radio button represents the number of evaluators that have selected that choice.
- In the example, only one person evaluated this Student, and that evaluator chose "Never" for both responses.

💡 **TIP**: If you hover your mouse over the number under the radio button, you will see the names of the evaluators who selected that option.

- **Your role as the Evaluator of Record is to review the summary Evaluation and select the options you feel are represented by the majority of the evaluators.**
- As the Evaluator of Record, you are free to select the option you feel best represents the Student, even if it goes against what the majority of the evaluators chose.

❗ **NOTE**: The Evaluation record will still show the original responses, but the Student will receive the score you, as the Evaluator of Record, chose for the Student.

- In the far right column (where it says "no responses"), you will see an average score for each question/prompt.
- Since the example, had only one evaluator evaluate the Student, no average score is available.
- **The average score allows you to identify outliers in the responses.**

⚠️ **NOTE:** The average score column is an optional feature that must be turned on in your system via the **Account Manager**. See your system administrator if you would like this option activated.

❗ **NOTE:** If a user answers all the questions on an Evaluation but does not submit the Evaluation, it is considered incomplete. The fact they have not submitted the Evaluation means that they are still free to go back and change their answers. But those partial (unsubmitted) Evaluations can still be included in the summary data.

Approve Evaluation

- Click the Approve button.

Confirm approval

- Click **Ok** to confirm and continue.
- To go back, click the small X icon in the top-right corner of the confirmation screen.
- Once you click **Ok**, you will receive another message confirming the number of Evaluations that have been submitted.
- Click **Ok** on that screen as well, to confirm and continue.
- Once this is done, the screen/window will close and the Student's name should be red in the list of summary Evaluations.

Incomplete Evals

If you attempt to approve a summary of Evaluations that include unanswered questions, you will get an alert. You have the option to go ahead and submit the incomplete Evaluation, or you can view the unanswered questions on the Evaluation Summary form. In the instance that your Evaluation form used skip or branching logic, these unanswered questions may not be relevant.

Review and Approve

Campus VS Course Template Level Reviews

- If the Approve button is clicked at the **Template Level**, the Evaluation status will go straight to **Approved** status.
- If the Approve button is clicked at the **Campus Level**, the Evaluation status will be considered **Submitted** and then the **Template Level** admin evaluator will still need to Review the Evaluation and Approve the Evaluation.

The option to Re-Review Evaluations

Send the Evaluation back to the Campus Level for re-reviewing

- Click the Re-Review box to send the Evaluation back to the Campus Level for re-reviewing.
- In our example, we approved the Evaluation for the Student named Lindsey Bart.
- Once the Evaluation has been approved, the Student's name will turn red in the Evaluation list.
- If you click the Student's name again, you will be able to re-review the Evaluation.

Color status change

When an Evaluation is marked for re-review, the color will change to orange.

Resetting the Summary Evaluation

- Click the rewind icon (in far right corner of each Student's row) to reset a Student's Evaluation Summary.

Reset Evaluation Summary

- To reset the Summary Evaluation, click **Yes**.