

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

Course Template **Campus Level** Section: Cardiovascular Medicine Close

Campus Level: Cardiovascular Medicine SOM 2021/2022 at Main Campus Materials

Details	
Evaluations	
Manage Materials	<
People	<
Assessment	<
PET	<

Program: MEDICINE
Course Master: Cardiovascular Medicine
Campus: Main Campus
Academic Year: SOM 2021/2022
School Year: MED First Year
Evaluator of Record: Leo Administrator
Director: Leo Administrator
Admin: Leo Administrator

Description

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

Template Level

Course Template Campus Level Section: Cardiovascular Medicine Close

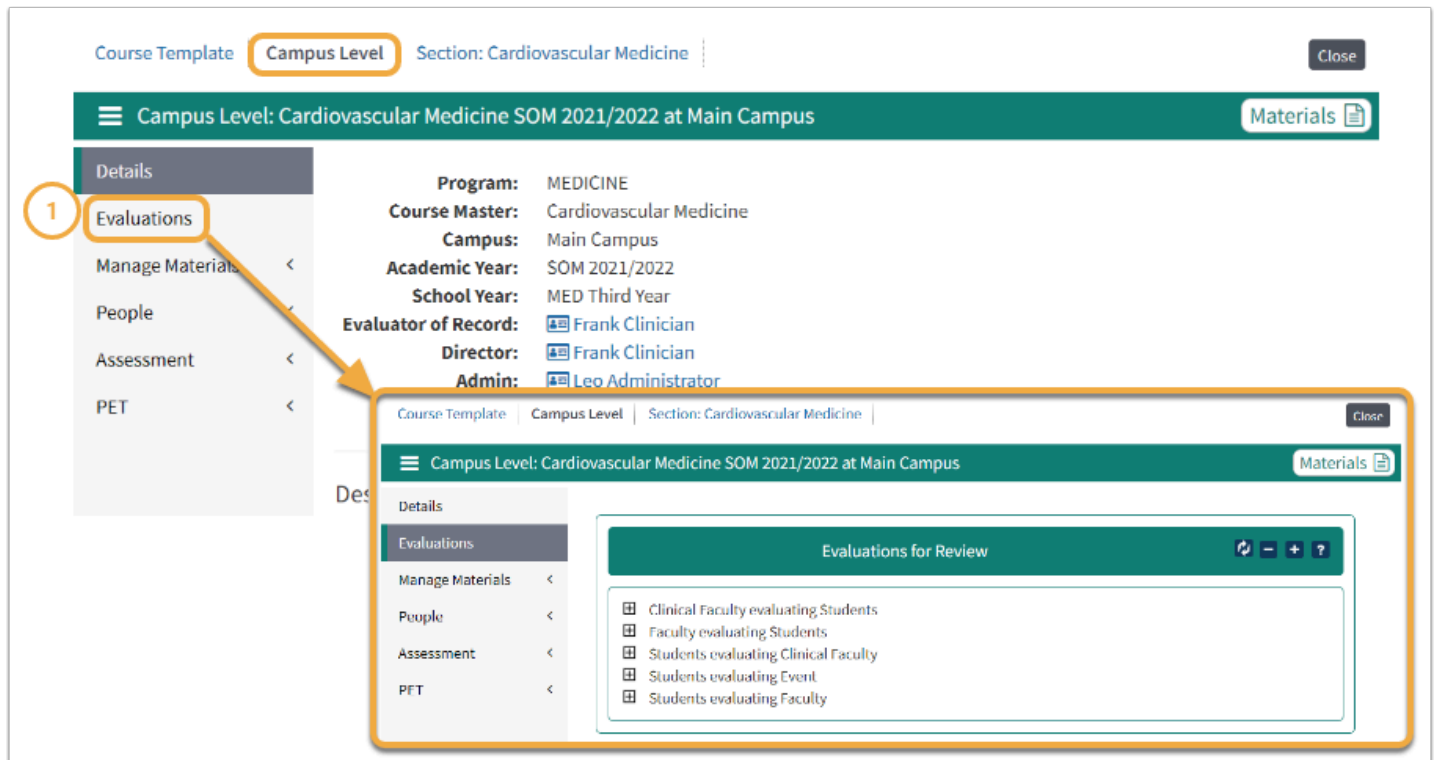
Course Template: Cardiovascular Medicine SOM 2021/2022 Materials

Details	
Evaluations	
Discussions	
Manage Materials	<
People	<
PET	<
Assessment	<
Settings	<

Program: MEDICINE
Course Master: Cardiovascular Medicine
Academic Year: SOM 2021/2022
School Year: MED Third Year
Evaluator of Record: Jane Faculty
Director: Jane Faculty

Description
 No description available

Evaluations



Course Template | **Campus Level** | Section: Cardiovascular Medicine | Close

Campus Level: Cardiovascular Medicine SOM 2021/2022 at Main Campus | Materials

Details

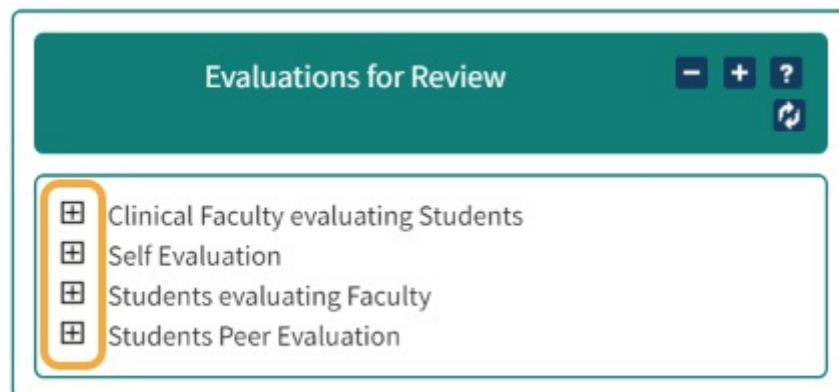
Program: MEDICINE
Course Master: Cardiovascular Medicine
Campus: Main Campus
Academic Year: SOM 2021/2022
School Year: MED Third Year
Evaluator of Record: Frank Clinician
Director: Frank Clinician
Admin: Leo Administrator

Evaluations for Review

- Clinical Faculty evaluating Students
- Faculty evaluating Students
- Students evaluating Clinical Faculty
- Students evaluating Event
- Students evaluating Faculty

1. Click the **Evaluations**

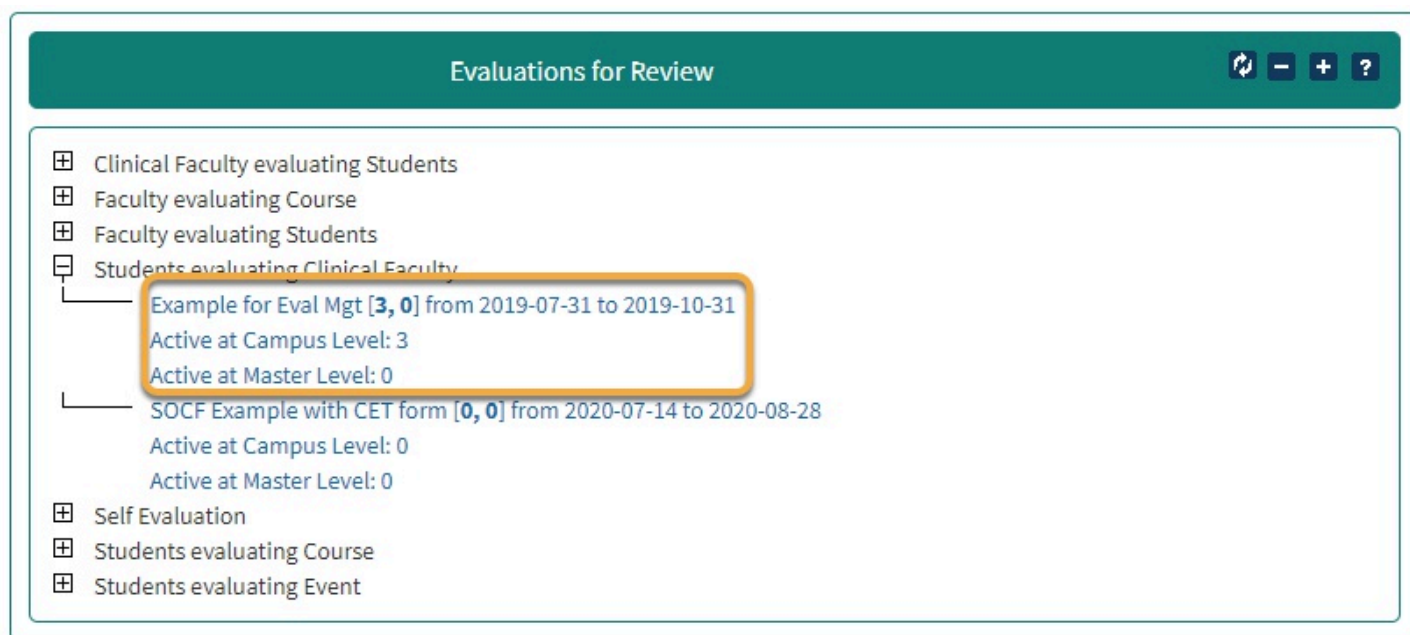
Expand the Evaluation types



Evaluations for Review

- Clinical Faculty evaluating Students
- Self Evaluation
- Students evaluating Faculty
- Students Peer Evaluation

Located Evaluation



- Click the Evaluation link to open

Review and Summarize

Cardiovascular Medicine SOM 2021/2022 R1 - Main Campus 2020-07-01 to 2021-02-28 CFOS-On-Demand Clinical Faculty evaluating Students				
Name	Status		Date Avail	Title
Instructor: Adelstein, David (New)		<input type="checkbox"/> Select all active evaluators		#1
Student: April, Doty	100 % completed	<input type="checkbox"/> Select for summary	2020-02-12	SOF Test
Student: Gershwin, Franks	100 % completed	<input type="checkbox"/> Select for summary	2020-02-12	SOF Test

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.


- 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

A Small Evaluation

SUMMARY EVALUATION

Cardiovascular Medicine SOM 2021/2022 R1 - Main Campus

Evaluator: Leo Administrator - Clinical Faculty evaluating Students

Status: **Started**


Short performance evaluation

Approve

Options ▾

Close

Evaluation for Student



Alphonse Alberto

* Rate the student's interaction with patients

✓ Answered

Agree

▾

Response (value)	Count
Strongly Disagree (1)	
Disagree (2)	
Neutral (3)	
Agree (4)	1
Strongly Agree (5)	
N/A (N/A)	

Average Score = 4.0000

* Rate the student's medical knowledge

Unanswered

Go To Next Unanswered

☐ Strongly Disagree (value: 1)

☐ Disagree (value: 2)

☐ Neutral (value: 3)

- Click the Approve button.

Confirm approval

R1 - Main Campus

Approve Evaluations

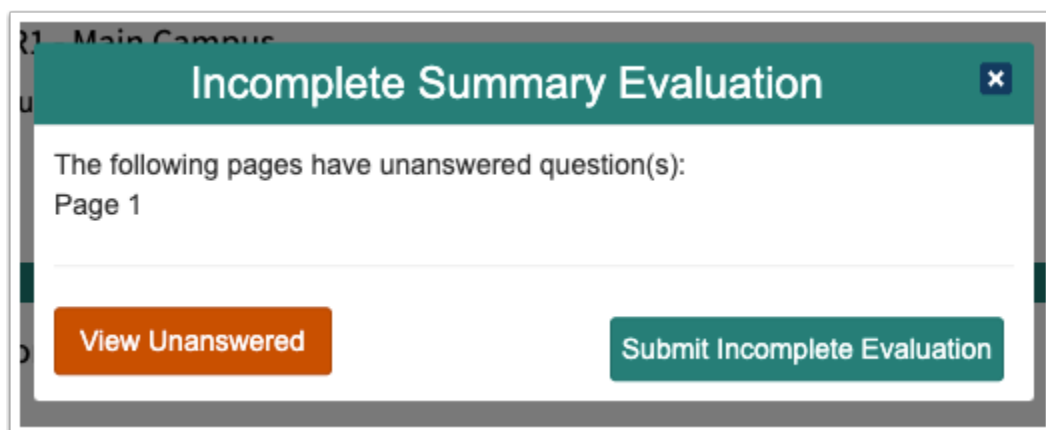
✕

This will approve all forms in this set of evaluations.

Ok

- 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

Filter: no filters					
Cardiovascular Medicine SOM 2021/2022 R1 - Main Campus 2020-07-01 to 2021-02-28 CFOS-On-Demand Clinical Faculty evaluating Students					
Name	Status		Date Avail	Title	
Student: Bertson, Will (Approved)					#1
Instructor: Asner, Julia	Completed	<input checked="" type="checkbox"/> included in summary	2018-09-15	Clinical Faculty Evaluation of Students for Psyc 2018-2019	
Instructor: Adams, Leslie	Completed	<input checked="" type="checkbox"/> included in summary	2018-09-15	Clinical Faculty Evaluation of Students for Psyc 2018-2019	
Instructor: Abouassaly, Michael	Completed	<input checked="" type="checkbox"/> included in summary	2018-09-15	Clinical Faculty Evaluation of Students for Psyc 2018-2019	

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

Sample Eval for portal Test

Clinical Faculty: Evaluation of students

[SUMMARY EVALUATION](#) [REVIEW MODE](#)

Psychiatry Clerkship SOM 2018/2019 R1 - Main Campus

Evaluator: John Smith - Clinical Faculty evaluating Students

Status: **Completed**

To all Clinical Faculty - please evaluate the students you interacted with during this course.

Evaluation for Student

Lexi Hawks

How was this student? Rate on a scale of 1 to 5. ✓ Answered

Poor (value: 1) ☐

Adequate (value: 2) ☐

Acceptable (value: 3) ☒ 1

Good (value: 4) ☐

Above Average (value: 5) ☐

How often was this student prepared for their events? ✓ Answered

Never (value: 0) ☐

Sometimes (value: 1) ☒ 1

Often (value: 2) ☐

Constantly (value: 3) ☐

Average Score = 1.0000

100%

[Previous Page](#) [Next Page](#)

- 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

Filter: no filters

Cardiovascular Medicine SOM 2021/2022 R1 - Main Campus

2020-07-01 to 2021-02-28

CFOS-On-Demand

Clinical Faculty evaluating Students

Name	Status		Date Avail	Title
Student: Bertson, Will (Review) #1				
Instructor: Asner, Julia	Completed	<input checked="" type="checkbox"/> included in summary	2018-09-15	Clinical Faculty Evaluation of Students for Psyc 2018-2019
Instructor: Adams, Leslie	Completed	<input checked="" type="checkbox"/> included in summary	2018-09-15	Clinical Faculty Evaluation of Students for Psyc 2018-2019
Instructor: Abouassaly, Michael	Completed	<input checked="" type="checkbox"/> included in summary	2018-09-15	Clinical Faculty Evaluation of Students for Psyc 2018-2019
Instructor: Joens, Richard	Completed	<input checked="" type="checkbox"/> included in summary	2018-09-15	Clinical Faculty Evaluation of Students for Psyc 2018-2019
Instructor: Adelman, Steven	Completed	<input checked="" type="checkbox"/> included in summary	2018-09-15	Clinical Faculty Evaluation of Students for Psyc 2018-2019
Instructor: Agosto, Vanessa	Completed	<input checked="" type="checkbox"/> included in summary	2018-09-15	Clinical Faculty Evaluation of Students for Psyc 2018-2019
Student: Hawks, Lexi (New) #2				
		<input type="checkbox"/> Select all active evaluators		
Instructor: Asner, Julia	Completed	<input type="checkbox"/> Select for summary	2018-09-15	Clinical Faculty Evaluation of Students for Psyc 2018-2019
Instructor: Adams, Leslie	Completed	<input type="checkbox"/> Select for summary	2018-09-15	Clinical Faculty Evaluation of Students for Psyc 2018-2019
Instructor: Abouassaly, Michael	Completed	<input type="checkbox"/> Select for summary	2018-09-15	Clinical Faculty Evaluation of Students for Psyc 2018-2019
Instructor: Joens, Richard	Completed	<input type="checkbox"/> Select for summary	2018-09-15	Clinical Faculty Evaluation of Students for Psyc 2018-2019
Instructor: Adelman, Steven	Completed	<input type="checkbox"/> Select for summary	2018-09-15	Clinical Faculty Evaluation of Students for Psyc 2018-2019
Instructor: Agosto, Vanessa	Completed	<input type="checkbox"/> Select for summary	2018-09-15	Clinical Faculty Evaluation of Students for Psyc 2018-2019

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

Resetting the Summary Evaluation

Filter: no filters Cardiovascular Medicine SOM 2021/2022 R1 - Main Campus 2020-07-01 to 2021-02-28 CFOS-On-Demand Clinical Faculty evaluating Students					
Name	Status		Date Avail	Title	
Student: Akbar, Student Dean (New) <input type="checkbox"/> Select all active evaluators					#1
Instructor: Admin, Admin	60 % completed	<input type="checkbox"/> Select for summary	2019-05-12	Testing EWF	
Instructor: Adelstein, David	60 % completed	<input type="checkbox"/> Select for summary	2019-05-12	Testing EWF	
Instructor: Adams, Leslie	Completed	<input type="checkbox"/> Select for summary	2019-05-12	Testing EWF	
Student: April, Doty (Open)					#2
Instructor: Adams, Leslie	Completed	<input checked="" type="checkbox"/> included in summary	2019-05-12	Testing EWF	

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

Reset Evaluation Summary

Reset Summary Evaluation

This option lets you erase a summary evaluation that has not yet been closed.

The primary purpose of this option to is erase any updates you have made to the evaluation. The system will then recalculate the average summary score for the evaluation as if it was the first time you were looking at this summary eval. Notes that have been entered will not be affected.

NOTE: This option cannot be undone.

Click **Yes** to reset this summary evaluation
Click **No** to stop

No

Yes

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