

2015

The International Conference on Residency Education  
La conférence internationale sur la formation des résidents

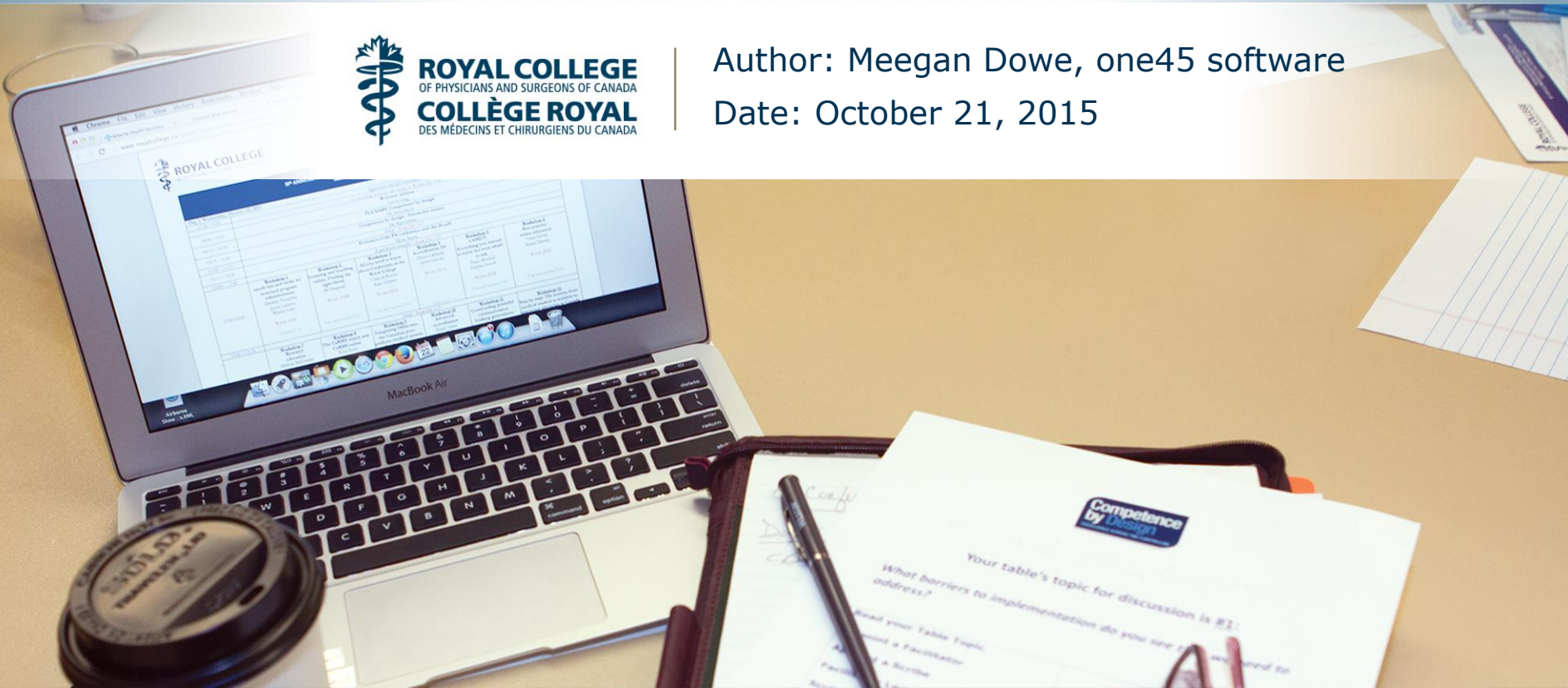
# Tips for New one45 Users from a Seasoned Program Administrator



**ROYAL COLLEGE**  
OF PHYSICIANS AND SURGEONS OF CANADA  
**COLLÈGE ROYAL**  
DES MÉDECINS ET CHIRURGIENS DU CANADA

Author: Meegan Dowe, one45 software

Date: October 21, 2015





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I have/had an affiliation (financial or otherwise) with a pharmaceutical, medical device or communications organization.

J'ai (ou j'ai eu) une affiliation (financière ou autre) avec une entreprise pharmaceutique, un fabricant d'appareils médicaux ou un cabinet de communication.



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# About Me



- New to the one45 team (April 2015)
- Formerly a Program Admin & Super Admin at Dalhousie University for 15+ years
- Part of one45's Implementation Team
- I've been to Pakistan!
- [meegan@one45.com](mailto:meegan@one45.com)

# Objectives for today

- Review tips for Administrators to help navigate one45
- Offer some training resources and supports
- Help new admins feel confident with one45
- Offer time for Questions & Answers

# Quick Intro

- Rolodexes
- eDossiers
- Schedules
- System tabs

one45  log out

**Schedules**

Sendouts

Reports

Forms

Setup

**Config**

 Support

[system updates](#)

Find A Person

Welcome Meegan

Int Med MGH

2015/16



me | rolodexes | schedules

▼ Rotation

Rotation Schedule

Rotation Planner

Print Views

Rotation Change History

▼ Academic Session

Academic Sessions

## Rotation Schedule & Workflow

- Schedule is the key to automation
- Keep your schedule up to date
- Update your workflow and forms as things change
- Keeps your evaluation sendouts easy & enables additional tracking
- Use custom pattern options for forms

# What if you need a new form?

- Form Builder!
- <https://support.one45.com/link/portal/15150/15186/Article/545/Form-Building-Overview#.VicAnH6rRD8>
- No access? – ask your Super Administrator
- Important Notes:
  - » Add Academic Year as part of a form name
  - » Don't just edit a form (makes the previous form disappear as the name is gone)
  - » Keep versions that are active and CLONE the form to rename it with edits for the new year



# Notes about Forms

- Cloning vs. Sharing
  - » Forms can be SHARED across many groups (i.e. Resident Evaluation of Faculty)
    - Advantage: any edits made in one group are updated on ALL groups the form is shared with
    - Disadvantage: one group can affect the form for all...
  - » Forms can be CLONED into a group (i.e. copied over to a group)
    - Advantage: Edits made don't affect anyone
    - Disadvantage: If edits are needed across more than one group, forms would need updated in each group separately

# Accreditation Tips

- Setup > Handouts & Links
  - » Attach the rotation objectives to your rotations within Handouts & Links
  - » Solves an accreditation check mark
  - » Allows you to run a report to show you who have viewed handouts

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Evaluation Workflow

Best Guess List

Rotation Dropdowns

Manage Blocks

Custom Fields

Email Messages

Mentors

Manage PGY Levels

Handouts & Links

Manage Rotations

Rotation Heads

Manage Rotation

Linkages

Idap search

## HANDOUTS & LINKS

[resident history](#) [faculty history](#)

Program

Site

Rotation


### Learning Objects for Int Med MGH:


[add object](#)

# Mailouts

- Sendouts > Mailout
  - » Easy way to send residents/faculty log on access in one message
  - » IMPORTANT: no email history!
  - » Use your work email account for general correspondence for tracking


# Mailouts

one45  log out

Schedules **Sendouts** Reports Forms Setup **Config**  Support [system updates](#) Fir

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me rolodexes sendouts

- Individual Sendouts
  - Bulk/Single Send
- Evaluation Tracking
  - Outstanding Forms
  - Completed Forms
  - Custom Search
- Emails
  - Failed Email Notices
  - Mailout**
  - Generic Email Log
  - Auto Email Log

to:  All My Internals  All My Externals  All My Faculty  All Admins  Custom

subject:

from: Meegan Dowe

reply email: meegan@one45.com

attachment 1:  No file chosen

attachment 2:  No file chosen

message:

# Academic Sessions / Half Days

- Schedules > Academic Sessions
- <https://support.one45.com/link/portal/15150/15186/Article/92/Academic-Session-Academic-Half-Days-Overview#.VicFFX6rRD8>
  - » Create a template for your reoccurring events
  - » Add teaching events to your academic calendar and set up evaluation specifics
  - » Easier way to track and report on attendance, Session or Presenter evaluations!

# Bulk Update Tool

- Allows you to update the evaluation target, anonymity of a form or results options.
- Sendouts > Custom Search

May require extra permissions to access.

- » <https://support.one45.com/link/portal/15150/15186/Article/556/How-do-I-bulk-update-my-evaluations#.VicIR36rRD8>

# Bulk Updates

## BULK EVALUATION UPDATE TOOL

### For these forms...

	evaluator	target	form	moment
1.	Campos, Corey	<u>Haney, Mariam</u>	Evaluation of Resident	Critical Care
9.	Frye, Rose	<u>Haney, Mariam</u>	Evaluation of Resident	Critical Care
12.	Goff, Adonis	<u>Haney, Mariam</u>	Evaluation of Resident	Critical Care
15.	Gray, Leon	<u>Haney, Mariam</u>	Evaluation of Resident	Critical Care

### Make these changes...

Scenario is: attending evaluates resident

not anonymous  anonymous

Do you want the target to see the results of this form in their inbox?

- The target will not be able to view their results.
- The target will be able to view their results as soon as they are available.
- The target will be able to view their results after they have completed ALL of their forms.
- The target will be able to view their results after they have completed the forms for this rotation.
- The target will be able to view their results after they have completed the forms for this rotation AND it is the end of the date range above.

Update



# What do Residents/Faculty see?

- Check their view!
- Search for a specific eDossier through your rolodex or the name search box (top right corner) & view their eDossier as they see it
- NOTE: there are restrictions on what a resident/faculty will see vs. what you as an Administrator see
- Evaluations tab
- Handouts/Links from Programs in their eDossier
  - » (e.g. residents will only have schedules and handouts for the programs and rotations they are scheduled in, as an admin you may have access to see more)
  - » There's a special note for "admin" which means ONLY admins can see those evaluations

# Extras

- Faculty Releasable Reports

- » <https://support.one45.com/link/portal/15150/15186/Article/142/Releasable-Evaluation-Reports#.VicLHX6rRD8>

- Low Performance

- » <https://support.one45.com/link/portal/15150/15186/Article/419/Low-Performance-Flagging-Course#.VicLTX6rRD8>

- Rotation Planner

- » <https://support.one45.com/link/portal/15150/15186/Article/3/Rotation-Planner-Overview#.VicMYn6rRD8>

- Rotation Heads & Mentors

- » <https://support.one45.com/link/portal/15150/15186/Article/173/Mentor-Overview#.VicMmH6rRD8>

# Extra Help & Resources

- New Training feature:

The screenshot displays the one45 web application interface. On the left, a navigation sidebar shows the user's name 'Meegan', department 'Int Med MGH', and academic year '2015/16'. Below this, a menu is expanded to show 'Rotation' options (Rotation Schedule, Rotation Planner, Print Views, Rotation Change History) and 'Academic Session' options (Academic Sessions). The main content area has tabs for 'Schedules', 'Sendouts', 'Reports', and 'Forms'. On the right, a help sidebar titled 'How can we help you?' is open, featuring a search input field and a list of resources: '\*\*new\*\* Interactive Tutorials', 'Printable Help Resources & Guidebooks', 'Online Training Resources', and 'Short Video Tutorials'. At the bottom of the help sidebar, there are links to 'one45 User Forum', 'Our Blog', and 'System Updates Blog', along with a 'Go to full support site' link and a 'powered by walkme' logo.

## Extra Help & Resources

- Get to know your colleagues internally & within your specialty
- Who is your Super Admin?
- Do you have departmental champions or mentors?
- One45 Support
- User Community

# Bonus Support

- One45 Community
  - <http://forum.one45.com>
  - Connects new administrators to other users on a wide range of topics
  - Ask a targeted question of fellow Super Admins, Admins
  - Connect a group on a related topic thread
  - Anyone can register as a user



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## Help us improve. Your input matters.

- Download the ICRE App,
- Visit the evaluation area in the West Ballroom Foyer, near Registration, or
- Go to: <http://www.royalcollege.ca/icreevaluations> to complete the session evaluation.

You could be entered  
to win 1 of 3  
**\$100 gift cards.**

## Aidons-nous à nous améliorer. Votre opinion compte.

- Téléchargez l'application de la CIFR
- Visitez la zone d'évaluation, foyer de la salle de bal Ouest, près du comptoir d'inscription, ou
- Visitez le <http://www.collegeroyal.ca/evaluationscifr> afin de remplir une évaluation de la séance.

Vous courrez la chance de gagner  
l'un des trois **chèques-cadeaux**  
**d'une valeur de 100 \$.**