

one45 Administrator Manual



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What is one45 Software?

one45 Software is an online **evaluation** and **scheduling** system. It was created to mimic the *paper worlds* for university programs with consultation with industry experts. It offers one-stop-shopping for evaluation, response tracking, reporting, performance flagging, procedure logging and scheduling for academic curriculum, clinical rotations, academic half days and hospital rounds. Objectives and other handouts can be attached to schedule components. Information about individuals is organized into personalized eDossiers, available to Administrators as well as the Students, Residents, and Faculty.

Core Benefits:

- Improve workflow efficiency
- Enhance communications across all levels
- Centralize Student, Resident and Faculty information
- Identify trends for decision making
- Better service Students, Residents and staff

Benefits for Electronic Evaluation:

- Automate the sending, receiving, and collating of evaluations
- 360 Evaluation: Evaluate rotations, courses, academic half-day, teaching rounds, Residents, Students, and Faculty
- Establish low performance flags to identify those Students and Residents having problems
- Collect valuable research data with surveys
- Generate email reminders for overdue forms
- Display photos on the forms

How does the system work?

- Use *your* forms with *your* questions, scales, and objectives
- Your set up aims to mimic *and improve* your current workflow in the paper world
- Faculty and Residents will receive e-mail reminders with username and password information to complete evaluations online. Your login information is confidential.
- Once forms are completed and confirmed they will be stored online or alternatively, can be printed and stored in the Learner's file.

How you will use the one45 system:

- Manage users in the system, create new accounts and edit information on user accounts
- Schedule Learners
- Set up the evaluation workflow
- Send and track evaluations
- Generate reports
- Enter grades (if applicable)



Big Picture Items

Super Administrator

Your Super Administrator is your main point of contact for supporting you in using one45 software. Contact your Super Administrator for help with:

- training on the one45 system
- requests for form builds and form edits
- technical support
- complicated issues, clarification of policies, standardized procedures

Your Administrator Responsibilities

There are specific tasks that Program or Group Administrators are able to perform in the system, as well as tasks that the Super Administrator will assist users with.

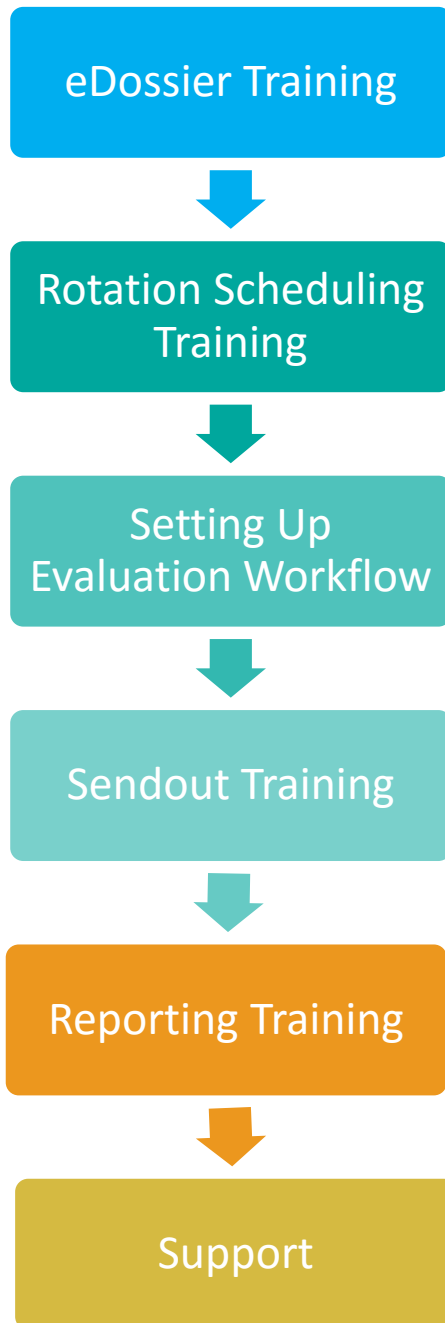
Additionally, there are specific tasks in the system that only one45 representatives are able to perform.

To help make this clear for you, we've provided the chart below.

Administrator	Super Administrator	one45
Running the day to day operations of his/her program, including: <ul style="list-style-type: none"> ▪ Updating user accounts (if applicable) ▪ Managing rolodexes ▪ Entering and editing schedules ▪ Maintaining evaluation workflow ▪ Sending out evaluation forms ▪ Generating reports ▪ Supporting staff and learners 	Supporting program administrators, including: <ul style="list-style-type: none"> ▪ Point of contact for bugs, enhancement requests and administrative support ▪ Training program administrators ▪ Communicating internal policy ▪ Ensuring consistent use of the software ▪ Assigning administrative access ▪ Standardizing procedures 	Supporting the super administrator and making configuration changes, including: <ul style="list-style-type: none"> ▪ Creating new forms, groups, block structures and grade sheets ▪ Providing support to the super administrator via the online ticketing system ▪ Training the super administrator ▪ Providing training resources for program administrators and other users ▪ Sharing new product development



For Program Administrators with Rotation Schedule



eDossier Training will provide a high-level overview of the system as well as how to navigate the eDossier account.

The **Rotation Scheduling Training** will introduce you to the rotation scheduler tool. You will be able to create rotations and build your schedule.

The **evaluation workflow** process defines the rules around when and how your evaluation forms will be sent out.

During your **Sendout Training**, you will be sending your first batch of evaluations in the one45 system.

Once you have started to accrue completed evaluation forms, the **Reporting Training** will introduce you to our many different reporting features.

Ongoing **support** is provided to you in many forms. We have a robust online help system, complimentary webinars, and a library of training videos to help you learn about one45s many features.



eDossier Training

For an in depth step by step training document on this subject, click [here](#).

Prior to this training session, please review your Faculty and Learner lists. Please review the links below:

- Overall system views ([switching groups/programs](#), [switching academic years](#))
- Rolodex ([adding Faculty](#), [removing Faculty](#), [adding Learners](#), [removing Learners](#))
- [Student eDossiers](#)
- [Faculty eDossiers](#)
- [Administrator eDossiers](#)
- [Password Recovery](#)
- [Handouts and Links](#)

Goals:

Your first training session will cover the eDossier account. This is how your Learners and Faculty interact with the system. By the end of the training, you should be familiar with both administrative and public views of the one45 system. You should be able to manage your rolodexes, update user accounts and upload learning materials.

Rotation Scheduling Training

For an in depth step by step training document on this subject, click [here](#).

Please review the links below:

- [Rotation Schedule Overview](#)
- [Printing your Rotation Schedule](#)
- [Entering Rotation Schedule](#)
- [Other Schedule Related Topics](#)
- [Editing your Rotation Schedule](#)

Goals:

By the end of this session, you should be able to enter and edit your rotation schedule. You should also be familiar with how to print rotation information.



Evaluation Workflow Training

For an in depth step by step training document on this subject, click [here](#).

In this training session, you will be setting up/reviewing your evaluation workflow (or set of rules) for each of your rotations. These will be the guidelines that the one45 system will use in order to send your forms out (in combination with your rotation schedule). Prior to this training, you may want to complete the [evaluation workflow worksheet](#) for each evaluation scenario of your evaluation forms (all evaluation forms must be entered into the system) and make sure that your schedule is up to date. Additionally, please review the links below:

- [Viewing/Printing Evaluation Forms in Template Form](#)
- [Activating/Deactivating Forms](#)
- [Setting up an Evaluation Process](#)
- [Best guess List](#)

It is also highly recommended that you watch a [recorded webinar on this topic](#) prior to this training.

Did you know that you can customized the body of the email message when individuals receive evaluation notification and reminder emails? When a user receives a task in their "To Do" box, they will receive an email alert of a new task to complete in the one45 system.

Please review the links below:

- [How do I edit my email message templates](#)
- [Video Tutorial on customizing email messages](#)

Goals:

By the end of this training session, your evaluation workflow and best guess list should be set up in the system. You should also be familiar with how to send your user's log in information to them.

Once your evaluation workflow has been set up, it can be modified at any time. Please review the following links for more information on changing an existing workflow:

- [Changing Form Distributors](#)
- [Updating Workflow with new Forms](#)
- [Changing when forms are sent](#)
- [Changing the head Evaluator/Releasor](#)
- [Removing a form](#)



- [Cancel a previously sent evaluation](#)
- [Change the evaluator](#)
- [Change the form distributor](#)
- [Change the rotation dates](#)
- [Reopen a previously completed evaluation](#)

Sendout Training

For an in depth step by step training document on this subject, click [here](#).

During this training, you will be performing a sendout. By performing a sendout, we will be sending evaluations to all scheduled Learners for a particular block on your rotation schedule. We will also go over how to monitor your sendouts and how to send email reminders to people with incomplete evaluations. Prior to this training session, please ensure that your evaluation workflow and best guess list are complete and that your rotation schedule is up to date. Additionally, please review the following links:

- [Performing a Sendout](#)
- [Completing Distributions](#)
- [Monitoring your sendouts](#)
- [Bulk/Single Sends](#)
- [Failed email notices](#)
- [Sending reminders to individuals with incomplete forms](#)

Goals:

After this session, you should know how to initiate and monitor a sendout, email reminders and track failed email notices in the system.

Occasionally, you'll need to make changes to evaluations that you have sent out. Please review the following links on how to make these changes:



Reporting Training

For an in depth step by step training document on this subject, click [here](#).

During this training, you will cover the various reporting options in the system. This training session can be started as soon as you have **completed** evaluations in the system. Prior to this meeting, please review the following links:

- [Reports by Target Overview](#)
- [Reports by Form Overview](#)
- [Comparison Reporting](#)
- [Overall Average](#)
- [Batch Reporting/Comparisons](#)
- [Individual Results](#)
- [Releasable Reports](#)
- [Monitoring sent reports](#)

TRACKING YOUR SENT EVALUATIONS:

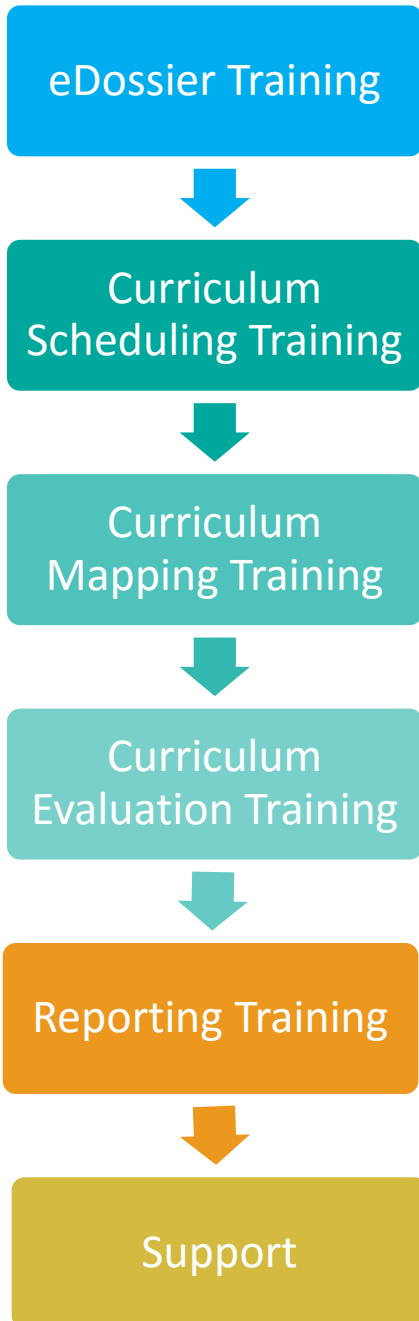
- [Finding a specific form](#)
- [Incomplete Forms](#)
- [Sending a Reminder](#)

Goals:

By the end of this session, you should be familiar with the various reporting options in the one45 system and know how to export your raw data so that you can perform analyses in your own statistical software.



For Program Administrators with Curriculum Schedule



eDossier Training will provide a high-level overview of the system as well as how to navigate the eDossier account.

The **Curriculum Scheduling Training** will introduce you to the management tool. You will be able to build your curriculum schedule and set permissions for user's access to this information.

The **Curriculum Mapping Training** will show you how you are able to attach your objectives and mappings to our curriculum information.

Evaluation Training will demonstrate how you are able to set up evaluation packages relating to your curriculum moments. These packages are set up in advance and are sent out at a set date in the future

Once you have started to accrue completed evaluation forms, the **Reporting Training** will introduce you to our many different reporting features.

Ongoing **support** is provided to you in many forms. We have a robust online help system, complimentary webinars, and a library of training videos to help you learn about one45s many features.



eDossier Training

For an in depth step by step training document on this subject, click [here](#).

Prior to this training session, please review your Faculty and Learner lists. Please review the links below:

- Overall system views ([switching groups/programs](#), [switching academic years](#))
- Rolodex ([adding Faculty](#), [removing Faculty](#), [adding Learners](#), [removing Learners](#))
- [Student eDossiers](#)
- [Faculty eDossiers](#)
- [Administrator eDossiers](#)
- [Password Recovery](#)
- [Handouts and Links](#)

Goals:

Your first training session will cover the eDossier account. This is how your Learners and Faculty interact with the system. By the end of the training, you should be familiar with both administrative and public views of the one45 system. You should be able to manage your rolodexes, update user accounts and upload learning materials.

Curriculum Scheduling Training

For an in depth step by step training document on this subject, click [here](#).

Please review the links below:

- [Curriculum Schedule Overview](#)
- [Creating Student Groups](#)
- [Adding a Portfolio](#)
- [Adding a Course](#)
- [Adding a Session](#)
- [Adding a new Activity](#)
- [Adding a Section](#)
- [Adding Rooms](#)
- [Scheduling People](#)

It is also highly recommended that you watch two recorded webinars on this topic. Please click [here](#) to see Curriculum Scheduling – Part 1 and [here](#) to watch Curriculum Scheduling – Part 2.



Goals:

By the end of this session, you should be able to enter and edit your curriculum schedule. You should also be familiar with how to give your users access to the appropriate curriculum information via their eDossier account. Curriculum Mapping Training

For an in depth step by step training document on this subject, click [here](#).

In this training session, you will be reviewing your mappings.

- [Attaching Mappings to your Curriculum](#)
- [Attaching Objectives to your Curriculum](#)
- [How do I add and/or edit mappings?](#)
- [Curriculum Search Tool](#)
- [How do I export my curriculum and associated mappings?](#)

Goals:

By the end of this session, you should be able to enter your objectives for your courses and sessions and attach your mappings. You should also be familiar with the Curriculum Search Tool and other related exports.

Curriculum Reporting and Search Training

For an in depth step by step training document on reporting on your curriculum data, click [here](#).

During this session, we will cover the various curriculum reporting options in the system. Prior to this meeting, please review the following links:

- [How do I export my curriculum and associated mappings?](#)
- [Curriculum Search Tool](#)
- [How do I export a list of my course activities and their facilitators?](#)
- [How do I find gaps or redundancy in my curriculum mappings?](#)
- [How do I show the relationships between my mapping list items, objectives, and weightings?](#)

Goals:

By the end of this session, you should be familiar with the various reporting options in the one45 system and know how to export your raw data so that you can perform analyses in your own statistical software.



CIR Reporting Training

For an in depth step by step training document on this subject, click [here](#).

Once you have your curriculum schedule with the associated mappings and objectives entered, you are almost ready to report to the CIR. There are a few more steps to take to ensure that we are all ready to start the reporting process for the CIR.

Prior to this training session, please have your curriculum schedule along with the associated mappings and objectives entered. In addition, please review the links below:

- [What data is included in the CIR export?](#)
- [How do I prepare to submit my data to the CIR portal?](#)
- [How do I ensure that I am ready for the CIR upload?](#)
- [How do I submit my data to the CIR portal?](#)
- [What will prevent data from being included in the CIR export or reported incorrectly?](#)
- [How do I add academic levels to my portfolios?](#)
- [How do I specify what is the primary method for a session?](#)
- [How do I specify if an assessment method is formative or summative?](#)
- [How do I determine where I have tagged formative or summative to my assessment methods?](#)
- [How do I indicate if a course is a didactic course, a clerkship - rotation or a clerkship - integrated?](#)
- [How do I indicate the duration of a session?](#)
- [How do I indicate if a course is required, elective or selective?](#)
- [How do I indicate the number of weeks for clerkships in my curriculum schedule?](#)
- [How do I map my lists to the AAMC master lists?](#)

Goals:

By the end of this training session, you should be on the right path to having your curriculum reported to the CIR.

Curriculum Evaluation Training

For an in depth step by step training document on this subject, click [here](#).

In this training, you will learn how your evaluation forms are set up as packages in the management tool. You will also go over how to monitor your sent forms and how to send email reminders to people with incomplete evaluations. Prior to the call, please make sure that all of your evaluation forms are in the one45 system.



Please review the links below:

- [Setting up Packages](#)
- [Completing Distributions](#)
- [Changing a Close Date on a Package of Forms](#)
- [Bulk/Single Sends](#)
- [Failed email notices](#)
- [Sending reminders to individuals with incomplete forms](#)

Goals:

By the end of this training session, you should be familiar with how to set up packages of evaluation forms in the one45 system. You should also be familiar with how to send your user's log in information to them and how to update your email messages. Finally, you should be able to email reminders and track failed email notices in the system.

Occasionally, you'll need to make changes to evaluations that you have sent out. Please review the following links on how to make these changes:

- [Cancel a previously sent evaluation](#)
- [Change the evaluator](#)
- [Change the form distributor](#)
- [Reopen a previously completed evaluation](#)



Reporting Training

For an in depth step by step training document on this subject, click [here](#).

During this training, you will cover the various reporting options in the system. This training session can be started as soon as you have **completed** evaluations in the system. Prior to this meeting, please review the following links:

- [Reports by Target Overview](#)
- [Reports by Form Overview](#)
- [Comparison Reporting](#)
- [Overall Average](#)
- [Batch Reporting/Comparisons](#)
- [Individual Results](#)
- [Releasable Reports](#)
- [Monitoring sent reports](#)

TRACKING YOUR SENT EVALUATIONS:

- [Finding a specific form](#)
- [Incomplete Forms](#)
- [Sending a Reminder](#)

Goals:

By the end of this session, you should be familiar with the various reporting options in the one45 system and know how to export your raw data so that you can perform analyses in your own statistical software.



Optional Features

Low Performance Flagging

For an in depth step by step training document on this subject, click [here](#).

With the low performance flagging tool, you are able to improve the educational integrity of your medical training program and stop Residents/Students who may be struggling and slipping through the cracks. Low Performance Flagging is used to monitor incoming assessments of your Learners for incidents of sub-par performance and initiate immediate follow-up. You decide what the benchmark scores should be and our software does the rest. Once a low performance flag is raised, the appropriate educators and Administrators are notified. These people then “discuss” the case online on a secure message-board to decide if further action is required. With this tool, you can identify Learners who may be struggling in specific areas but who nonetheless receive passing grades. Then you can help them improve. In addition the system creates an electronic “paper trail” of the process. [Click here](#) for more information.

Goals:

By the end of this training session, your low performance flags should be set up in the system. You should also be familiar with how to manage low performance notifications.

In this training session, you will be setting up/reviewing your low performance flags for each of your evaluation forms. These will be the guidelines that the one45 system will use in order to notify the appropriate educators and administrators once a low performance flag is raised. Please review the links below:



- [How do I set up my Low Performance flags?](#)
- [What happens when a low performance flag is triggered?](#)
- [How do I view and sign off on a low performance flag?](#)
- [How do I send a low performance flag to someone else?](#)
- [How do I delete a low performance flag?](#)
- [How do I customize my email message?](#)
- [How do I view the 'active' flags for my group?](#)
- [How do I view 'archived' flags for my group?](#)

It is also highly recommended that you watch a [video on this topic](#) prior to this training.

Once your low performance flags have been set up, they can be modified at any time. Please review the following links for more information on changing an low performance flag setup:

- [How do I edit my low performance flag set up?](#)
- [How do I update who is notified of a low performance flag?](#)

Academic Half Day Scheduling

For an in depth step by step training document on this subject, click [here](#).

Administer all aspects of Academic Half-Days or other classroom-based teaching with one simple interface. With the Academic Session Scheduler, you can provide Learners and educators with year-long event schedules (e.g., lectures, seminars, journal clubs, presentations), initiate and monitor evaluations of presenters, track attendance and make changes to scheduled events quickly and easily. You can attach learning objects (i.e., handouts, etc.) to specific sessions. This tool also includes a template feature that speeds the scheduling of regular, repeating events and events that have characteristics in common (e.g., attendee lists or locations). Eliminate the hassle-factor from your program's non-clinical education components with the Academic Session Scheduler.

Training Preparation:

Prior to this training session, please have your Academic Half-Day schedule available. Additionally, please review the links below:

- [Academic Session / Academic Half Days Overview](#)
- [Tracking Attendance](#)
- [How do I schedule a new academic session or half day event?](#)
- [Event Templates for Academic Half Days](#)
- [Excuses for Absence in Academic Sessions](#)
- [How do I edit an event template?](#)
- [How do I track attendance for an academic half day session?](#)
- [How can I give someone access to edit my Academic Half Day schedule?](#)



- [Using Coloured Flags](#)
- [How do I delete a cancelled academic half day session?](#)
- [How do I edit my academic half day schedule?](#)
- [How do I delete a location from my list?](#)
- [Event Topics](#)
- [How do I add a new location to my list?](#)
- [How do I change the session presenter on forms that have already been sent?](#)
- [How can event attendees track their own attendance?](#)

Goals:

By the end of this training session, you should be able to set up your Academic Half-Day calendar in the system. You should also be familiar with how to manage your daily events and to how to set up evaluations.

Duty Hours

Your Learners are able to track the number of duty hours that they have worked.

Training preparation:

During this session, you will learn how to set up the duty hour tracking system and how to report on the shifts entered in the system.

Prior to this meeting, please review the following links:

- [Duty Hour Setup](#)
- [Reporting on individual Duty Hours](#)
- [How learners track their duty hours](#)

Goals:

By the end of this session, you should be familiar with how to set up and track Duty Hours

Rotation Heads & Mentors

Training preparation:

During this session, you will learn how to give an individual access to rotation information and for instructions on how the individual will access the information. Prior to this meeting, please review the following links:



- [Rotation eDossier \(for administrators\)](#)
- [Rotation Heads](#)

Also, you will learn how to set up faculty members as mentors to a single or group of residents or students (learners). The Mentors will then be given access to those learners' evaluations, grades and logs to help follow their progress.

Prior to this meeting, please review the following links:

- [Mentor Overview](#)
- [Assigning learners to a Mentor](#)
- [Faculty view of Mentees](#)

Goals:

By the end of this session, you should be familiar with how to easily provide rotation supervisors, admins, etc. with the rotation reports and other data without having to send them electronic copies or print the data. Also, you should be familiar with how to set up faculty or administrators as Mentors and know how they get access to learners' evaluations, grades and logs completed in the group they are set up.



Patient/Procedure Logs

For an in depth step by step training document on this subject, click [here](#).

With the Patient/Procedure Log tool in the one45 system you can create customized case logs and procedure logs with your own questions. This allows you to use your own diagnoses and procedure lists to record Learner activities (with flexible categories for ease of use). If required, you can empower the supervisors to sign off on individual logs and complete customized feedback questions. The Learner's eDossier account will publish the numbers completed, mandatory skills, LCME requirements, and feedback to your Students and Residents. The tool allows you to track competence of skills in a variety of ways (ie application, automatic, threshold of number completed, or main supervisor to review data). It also enables you to compare Students, procedures, PGY levels, and competence with flexible and powerful administrative reporting.

Training Preparation:

Prior to this session, please ensure that your logbooks contain the correct information in one45. Additionally, please review the links below:

- [What is a Log?](#)
- [How do students enter their patient/procedure logs](#)
- [How do I edit a logged procedure](#)
- [Feedback Logs](#)
- [Bulk Sign-off of Procedure Logs](#)
- [Log Exports](#)
- [Log Reports](#)

Competency Grids

Competency grids are used to track whether your learners have achieved the required experiences during their time in your program.

- [How do I create a new competency/expectation grid?](#)
- [How do I see the competency items that I have logged?](#)
- [How do I report on my competency/expectation grids?](#)
- [Summary Log Reports](#)
- [How do I compare which competency items are encountered at different rotations?](#)
- [How do I see a summary of all of the competency items that a learner has logged?](#)



Goals:

By the end of this session, you should be able to enter and manage Logbooks. You will also be able to report on your Logbooks and set up Competency Grids for advanced reporting.

Grades

For an in depth step by step training document on this subject, click [here](#).

With the Grades tool in the one45 Software system you can track Learner grades and post them for the Student/Resident to view (depending on confidentiality status). Grades can be manually entered by an Administrator or calculated based off of the responses within an evaluation or a combination of both. All grades data can be easily reported on by the Administrator. The data can be exported across a specific course, academic year or customized timeframe.

Training Preparation:

Prior to this training session, please review and make sure all of your grade sheet templates and calculations have been provided to one45 and reviewed. Additionally, please take the course below:

- [How do I view the grade sheet?](#)
- [How do I view an individual learner's grades?](#)
- [How do I attach a grade sheet to my program?](#)
- [How do I attach a learner to a grade sheet?](#)
- [How do I remove a grade sheet from a learner's account?](#)
- [How do I enter a learner's grade?](#)
- [How do I view and/or release grades in bulk?](#)
- [How do I import grades?](#)
- [How do I export an individual learner's grades?](#)
- [Overall Grades Reports](#)
- [How do I roll over my grade sheet to the new academic year?](#)

Goals:

By the end of this training session, your grades should be set up in the system. You should also be familiar with how to manage, release and export grade results.



Thank you for choosing one45!

More than a software vendor, one45 is your healthcare education technology partner, dedicated to helping you achieve your accreditation and learners success goals – and meeting your evolving health education and technology needs. Our clients have selected one45 because of our solid reputation in helping medical schools improve their graduate and undergraduate programs, using genuine insight and data intelligence that produces real results at a practical cost. Our clients have stayed with us because we partner with them to solve their unique challenges, and because our service and support teams are available at a moment's notice to answer any question.