

one45 Administrator Cheat Sheet

The Basics

Password Recovery

1. Go to the one45 login screen for your institution
2. Click the **Need help logging in?** link
3. Follow the instructions provided

Mailouts

1. Send emails to users via **Sendouts > Mailout**
2. Select the individuals/groups and complete the fields
3. Opt to include login information for new users (if applicable)

The Rolodex

1. Add and remove residents via the **add/del** links in your rolodex
2. Add attendings via the **add faculty** link; remove via **departments** in their **Personal Info** tab
3. Administrative users are shown under the **Admins** rolodex

User Accounts

1. Update user information via the **Personal Info** tab
2. Add absences via the learners' **Vacation/Leave** tab
3. Adjust rank/levels via **Personal Info > Associated Info** section

Scheduling & Sendouts

Rotation Schedule

1. Schedule learners into rotations by clicking on the block
2. add/edit rotation names via **Setup > Manage Rotations**
3. Print your schedule via **Schedule > Print View**

Evaluation Workflow

1. Add/update forms via **Setup > Evaluation Workflow**
2. Create distribution lists via **Setup > Best Guess list**

Block Sendouts

1. Always verify your schedule and eval workflow prior to a sendout. Schedule and workflow changes made after a sendout are not retroactive
2. Do sendouts consistently. Ask one45 to setup a reminder for you
3. Monitor completion by block under **Sendouts > Schedule Sendouts**

Evaluation Tracking

Evaluation Tracking

1. Track sent/completed forms under **Sendouts > Evaluation Tracking**
2. Send individual or bulk email reminders and make additional changes to sent forms in the form search page (i.e. forward to someone else to complete, reopen for evaluator to make changes, fill in on evaluator's behalf, delete forms).
3. Search for any form via **Sendouts > Custom Search**

Reporting

1. Generate printable composite reports on your learners and other targets via **Reports > Reports by Target**
2. Generate overall composite reports of evaluation forms or create rotation groupings for comparison reporting via **Reports by Form**
3. Forward individual faculty summary reports to faculty via **Releasable Reports**
4. Compile and forward full faculty summary reports to Program Directors via **Releasable Reports**
5. Export raw data into an Excel or .csv file via **Form Data Export**

Academic Half Days

1. Schedule events that will appear in your learner's calendar via **Schedules > Academic Sessions > new**
2. Create a unique event or create a template that can be used to quickly create multiple events that share similar characteristics
3. Upload files associated with the events and setup evaluations of attendees or presenters
4. Report on session attendance and evaluation results via the **Reports** tab

Low Performance Flags

1. Setup thresholds on your evaluation forms so that you will be notified of low scores via **Forms > Low Performance**
2. Under **Flags Set-up**, click **add** to setup your thresholds
3. Setup who is notified of low performance under **Notify in ToDo**
4. Track Active and Archived flags

Procedure Logs

1. View logs under **Forms > Logs** and procedure lists under **Forms > Lists**
2. View individual progress in the **Pt/Procedure log** tab of the learner's eDossier account
3. Report on all learners under **Reports > Log Reports**
4. Export log data under **Reports > Log Exports**

Contact Client Services

Call us at 1 (604) 742-0029 weekdays 8am - 5pm PST

Submit a ticket through the Support Portal

To access the portal to submit your request, log into your one45 account and click on the **Support** tab. In the Support Portal, click **New Ticket** to submit your support request.