Evaluation Workflow Worksheet

Form Name: _____

1. When is this form sent during a rotation?
   o ___ days before the end of the rotation

2. Evaluator Role (who is doing the evaluating):
   o Attending
   o Resident
   o Student
   o Admin

3. Who should receive this form (or have this form completed on them)?
   o Anyone doing the rotation
   o * Only your internal learners
   o Only your external (rotating) learners
   o Only learners from specific department(s): _____
   o Only certain PGY levels, please specify: 1 2 3 4 5 6 7 8 9

3. Target of the form (who/what is being evaluated):
   o Attending
   o Resident
   o Student
   o Admin
   o Survey
   o Course/Rotation
   o Session
   o Speaker
   o Self
   o Admin

4. How to forms get to the appropriate evaluator?

   When the resident/learner is being evaluated:
   o One form distributor will decide (usually the rotation coordinator or administrator)*
   o Each resident will decide for themselves (they will see the option to "pick attending" in their To Dos)
   o All on the best guess list
   o There is no distribution required. This is a self-send scenario.
   o Use Schedule Matching if available

   When the attending is being evaluated by the learner:
   o One form distributor will decide (usually the rotation coordinator or administrator)
   o Each resident will decide for themselves (they will see the option to "pick attending" in their To Dos)
   o All on the best guess list
   o There is no distribution required. This is a self-send scenario.
   o Use Schedule Matching if available

5. Head Evaluator/Summary:
- o No
- o Sum (Releasor: _____)
- o * Head (Head Evaluator:_____ / Form _____)

6. Is this form anonymous?
- o Yes (evaluator name will be hidden – use when learners evaluate attendings and rotations)
- o No (evaluator name will NOT be hidden – use when attendings evaluate learners)

7. Viewing results
- o When the resident/learner is being evaluated:
  - o No
  - o Yes, as soon as the results are available
  - o after they have completed ALL of their forms
  - o after they have completed the forms for this rotation
  - o after they have completed the forms for this rotation AND the rotation is finished*
- o When the attending is being evaluated by the learner:
  - o * No
  - o Yes, as soon as the results are available

7. Can the evaluator opt out of completing the evaluation?
- o Yes
- o *No

8. Do you want to assign a close date on the form? (the standard is 360 days)

9. Please list the rotations that you would like to use this form for:

_____
_____
_____
_____
_____