Evaluation Workflow Worksheet

Form Name: ____________________________

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

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

3. Who should receive this form (or have this form completed on them)?
   ○ Anyone doing the rotation
   ○ * Only your internal learners
   ○ Only your external (rotating) learners
   ○ Only learners from specific department(s): ________________________________
   ○ 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):
   ○ Attending
   ○ Resident
   ○ Student
   ○ Admin
   ○ Survey
   ○ Course/Rotation
   ○ Session
   ○ Speaker
   ○ Self
   ○ Admin

4. How to forms get to the appropriate evaluator?

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

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