Tips for New one45 Users from a Seasoned Program Administrator

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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.
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
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
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
Welcome Meegan

Int Med MGH

2015/16

me rolodexes setup

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
ldap 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
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.

### Bulk Evaluation Update Tool

#### For these forms...

<table>
<thead>
<tr>
<th>evaluator</th>
<th>target</th>
<th>form</th>
<th>moment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campos, Corey</td>
<td>Haney, Mariam</td>
<td>Evaluation of Resident</td>
<td>Critical Care</td>
</tr>
<tr>
<td>Frye, Rose</td>
<td>Haney, Mariam</td>
<td>Evaluation of Resident</td>
<td>Critical Care</td>
</tr>
<tr>
<td>Goff, Adonis</td>
<td>Haney, Mariam</td>
<td>Evaluation of Resident</td>
<td>Critical Care</td>
</tr>
<tr>
<td>Gray, Leon</td>
<td>Haney, Mariam</td>
<td>Evaluation of Resident</td>
<td>Critical Care</td>
</tr>
</tbody>
</table>

#### 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 button]
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:
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
• One45 Community
  – [http://forum.one45.com](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
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/icreeevaluations 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 $. 