



Postgraduate Medical Education Office

one45 workshop

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Today's Agenda

- What is evaluation workflow?
- How do we configure it?
- Hands on time in one45
- BONUS: one45 access!



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What is evaluation workflow?

It is the system by which one45 automates the process of sending out evaluations.



What are we evaluating?

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- What types of evaluations should be occurring during each rotation?
 1. Evaluation of the learner
 2. Evaluation of the attending(s)
 3. Evaluation of the rotation



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What drives the evaluation workflow?

- While the schedule is the key to automation, the other key part of the evaluation workflow are the evaluation forms.
- The schedule should be checked at the beginning of each block, before the sendout occurs.
 - Changes that happen after the sendout require manual intervention (single sends).
- Forms should be reviewed and updated annually before the start of the academic year. Mid-year changes can affect data reporting and comparison.



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How do we determine the evaluation workflow?

- The Evaluation Workflow Worksheet will help you answer the questions you need in order to set it up.
- Using the worksheet will help standardize the evaluation process across your rotations.
- Today, we will go over these questions, and the possible answers that go with them.



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1. When is this form sent during a rotation?

- This determines how many days before the end of a block (or blocks) a particular form should be sent.
- This can vary not only from program to program, but from rotation to rotation, and even between distributors and head evaluators.
- Some people prefer to receive the forms at the beginning of the rotation, some toward the end. Most rotations are set to send out 7-10 days before the end of a block.
- If a form is to be sent 25 days before the end of a block, but you do the sendout 14 days into the block, what happens?



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2. Evaluator Role

- This is where we decide who will be completing the assessment:

- ☐ **Attending**
- ☐ **Resident**
- ☐ **Student**
- ☐ **Admin**

Evaluator -> Target (resident -> attending)

(a) Resident evaluates:

- ☐ resident
- ☐ resident
- ☐ attending
- ☐ admin
- ☐ rotation
- ☐ self
- ☐ survey

OR (b) someone evaluates the resident:

- ☐ student -> resident
- ☐ attending -> resident
- ☐ admin -> resident

- When might we select "Admin" as the person evaluating the learner?
 - Allied health professionals
 - Manual evaluations, such as forms completed on paper and Out of Town Elective Forms



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3. Use this form for which residents?

- ☐ **Internals only**
- ☐ **Externals only**
- ☐ **Both (internals and externals)**
- ☐ **Only externals from specific departments:**
- ☐ **What PGY levels?**

- How are internal vs. external residents defined?
- What is the default setting across Schulich?
- What must be kept up to date if you select specific PGY levels?



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4. Distribution

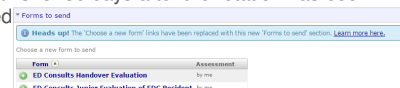
- How do the forms get to the appropriate evaluator?
 - Directly (best guess list, schedule matching)
 - Form distribution (self, third party)
 - Options:
 - ☐ **One Form Distributor will decide**
 - ☐ **Each evaluator will decide for themselves**
 - ☐ **All on the Best Guess List**
 - ☐ **No distribution required. This is a self-send scenario.**
 - ☐ **Use schedule matching if available.**



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4. Distribution – Self Send Setups

- Attendings, admins, and learners may need permanent access to a blank evaluation form (i.e. for daily evaluations)
- This gives the user access to the form in their To Do section for completion on any target, at any time. See image below for example. This To Do item becomes available on the first day of the rotation and remains for 30 days after the rotation has been completed



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4. Distribution - Best Guess List

- The Best Guess List consists of the list of faculty/admins/residents that are most likely to supervise a learner in a particular rotation.
- This list is manually maintained and must be updated as needed.
- To add individuals to the Best Guess List:
 - Click the Setup tab
 - Click the Best Guess link
 - Scroll down until you see the rotation name
 - Click Add Faculty/Resident/Admin



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4. Distribution - Schedule matching

- If you know which preceptor a learner is working with in a particular rotation, you can add this information into the one45 system.
- This will simplify the sendout process, because preceptors will receive the appropriate evaluation forms directly without the need of a form distributor.
- To match a learner with a preceptor:
 - Click the schedules tab
 - Click on the rotation schedule
 - Find the learner on the left side, and click the rotation for which you wish to add a preceptor
 - In the rotation picker, click the add preceptor link



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5. Head Evaluator/Summary

- This is referred to as a tiered workflow, which functions well for rotations where there are multiple evaluators.
- The best practice is to have ONE final evaluation for each resident at the end of their rotation, so it is clear whether the met the overall objectives for that rotation.
- This is achieved by assigning a head or summary evaluator.



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5. Head/Summary (cont'd)

- Summary Evaluations:
 - One person responsible for releasing a single, summary evaluation that houses ALL contributor data in ONE single document.
 - Once forms have been completed by contributors, they go to the releasor's To Do's. one45 will automatically summarize everything – if the forms are identical - so the learner will not know who said what. Only the contributor's names will be at the top of the form.

* Summary Evaluations (12)

* Forms/names with stars can only be completed/released after at least one contributor form is complete.

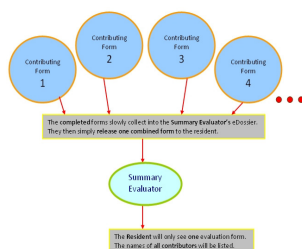
Target	Activity *	Program	Dates	Form	Contributors
Yoo, David Kyumdae	Infectious Diseases	Int Med	May 2 /16 - ITER ID 2016		<input checked="" type="checkbox"/> Release/Reupload/Save
Learner evaluations complete					



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5. Head/Summary (cont'd)

- Summary Evaluations:



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5. Head/Summary (cont'd)

- Head Evaluators:
 - Own the evaluation process for a rotation, and have the final say in what the learner sees.
 - Once forms have been completed by contributors, they go to the releasor's To Do's. Once the head evaluator has reviewed the contributing forms, they will fill out a head evaluator form.
 - One45 has an autofill feature for head evaluators, as long as the contributor and head forms are the same.



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5. Head/Summary (cont'd)

- Head Evaluators:

The completed forms slowly collect into the Head Evaluator's inbox. They use the combined data to start a fresh, blank head form.

Head Evaluator

Head Form

The Resident simply sees one evaluation form. Only the Head Evaluator's name will be shown.

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5. Head/Summary (cont'd)

- Why is it important to collect input from contributors via one45 instead of in-person or via email?
 - To keep a central record
 - So that residents are aware of who has contributed to their evaluations.
 - To assess faculty contributions

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6. Are the results of this form anonymous?

- When a learner is evaluating a rotation or an attending, the responses should be ANONYMOUS so they can feel comfortable in providing constructive feedback.
- When a resident is being evaluated by an attending, the responses should NOT be anonymous, so the learner understands the context of the feedback.

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7. Do you want the target to see the results of this form in their inbox?

- When the target is a learner, most rotations choose to allow the resident to only see their results if they've completed all of the forms.
- When the target is an attending or rotation, the selection is NO, and only aggregate data is released*
- Most programs in the Department of Medicine do not have mid-rotation evaluations.

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7. Can the evaluator opt out of completing this form?

- For most rotations and forms, this answer is NO.
- Errors do occur, for example, if an attending was on vacation when a learner was working with their team, they may not feel comfortable providing feedback.
- Deleting forms is done through the Custom Search function
 - Sendouts → Custom Search → search by evaluator or target

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8. How many days should this form be available before being canceled?

- For most rotations and forms, the default of 360 days is in place, and then the system deletes the form.
- A shorter date could be used when _____

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Custom sendout patterns

- When a learner has back to back blocks in one rotation, the one45 default is to send ONE evaluation at the end of the last block.
- Custom patterns allow you to override this default.
- They will also allow you to send out mid-rotation evaluations.
- You will know when a form has a custom pattern because it will be highlighted in yellow in your evaluation workflow.



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Changing existing workflows

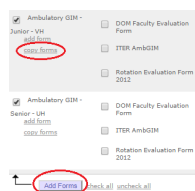
- The most frequent reason to change an existing workflow is a change to a form, or an additional form being added, or a change to the # of days before the end of a block a form is to be sent.
- Changing a form version is simple – you can click on the form in your evaluation workflow, and select a new form in the drop down. This will REPLACE the current form, and should only happen annually.



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Evaluation workflow bulk tools

- You can copy a form – and its associated workflow settings – by clicking “copy forms”. You will be prompted to select the rotation(s) you want to add it to.
- You can add a form to multiple rotation by using the “Add forms” button and selecting the rotations you wish to add the forms



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- Admin access to the Education programs in one45 is requested by filling in the form on the PGME Education Technology Website.
- There are a lot of permissions, so we have standardized what is “standard” for certain roles, such as program co-ordinators, program assistants, program directors.
- Each specialty and subspecialty program has control over who has access to view/edit their data.
- Schulich Education and some key Information Services roles also have access to programs.



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one45 faculty edit access

- As a best practice guideline, we do not recommend that faculty members be given **administrative** access to one45, and we will work with you to ensure they have the tools to be able to perform their administrative roles.
- They can be given access to view many areas using the rotation heads function. Access through this feature is maintained by each program admin.
- There are instances where faculty need to assigned a permission to EDIT an area of the site. Access to one45 can be both very granular and very broad, and we’re glad to work with you and one45 to ensure that the access is appropriate. Access to these permissions is maintained by Schulich Information Services.



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- Resources
- https://www.schulich.uwo.ca/medicine/postgraduate/academic_resources/education_technology/index.html

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Acknowledgement

This workshop was prepared during my time as the Evaluation Coordinator for the Department of Medicine. I would like to thank them for their support as we developed resources that shape what we are able to offer now Schulich-wide.

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