

Automatic vs. Manual Evaluation Matching

Many times, you may wonder whether it's best to use automatic or manual matching (or in some cases, both) for a particular evaluation session. The main difference between the two methods is that automatic matching checks against resident/fellow and faculty block schedule rotations to create matches, while in manual matching you identify each individual match pair on your own. Generally speaking, resident and fellow block schedules will be complete and accurate. However, since faculty, nurse, and other personnel are not required to have schedules in New Innovations, their information may be less complete and require updating before their rotations will properly feed into automatic matching. Therefore, you'll want to consider your approach when setting up session matching. Here are some important questions to ask when determining which match method to use in a session:

-How complete/accurate is my block schedule information for the people this session involves?

If the evaluators and subjects for the session are already assigned to complete, reliable block schedules including the rotations you define in your session, it's going to be easier to use the automatic match.

-How complex and/or stable is the block schedule for these people?

If some of your evaluators/subjects rotate frequently (a new rotation every week), or their block schedule often changes, it may be easier to manually match.

-Do I know the names of every individual involved in these evaluations, or do I have a reliable means of getting these names every time I need to make matches?

In order to successfully use the manual match, you'll need to know exactly who your evaluators and subjects are for every session interval. This may involve close communication with outside departments

-Does this evaluation involve outside departments?

For automatic matching, you'll need to collaborate with other program coordinators to make sure these outside personnel are on the rotations you'd expect. For the manual match, you'll need to create and update a list of which rotators/outside faculty will be working with your program for this evaluation.

-Is this a rotation specific evaluation, or do I want it going out to all faculty, PRG1s, Nurses etc. in my program regardless of what rotations they work with?

If you have a generic evaluation going out program-wide, for example faculty evaluation of fellow every six months, it may be easier to manually match this session.

-Does this evaluation contain rotation specific milestone content?

If your evaluation includes direct milestone content configured by rotation, it is much easier to use the automatic match.

-How many people is this going out to, and how often throughout the year?

The less frequent the evaluation and the fewer personnel involved, the fewer intervals and individuals you need to keep track of for manual matching. This may be easier than maintaining faculty block schedules.

-Is this a self-evaluation?

Self evaluations can only be done via manual matching.

-Which method do I prefer?

If both methods seem to have their ups and downs after reading these other questions, and you have access to faculty block schedule info but also have the ability to maintain a list of the individuals you want as evaluators and subjects, then it may come down to personal preference. Would you rather input and maintain block schedules for all personnel involved, or keep an active list of matches and create them piecemeal for each session interval?