Evaluation Session Help Sheet

Section	Key Configurations	Questions for PD	Data Sources
People	a) Evaluator and Subject status types b) Evaluators/Subjects from other departments c) On Demand-Evaluator/Subject	a) What roles (Faculty, 2nd yr fellow, etc.) are evaluating, and who is being evaluated? b) What other departments are involved as evaluators/subjects for this evaluation? c) Do we want evaluators to be able to pull up this evaluation at any time, or just be matched in when we create a match?	• Personnel Status types • Personnel Home department
Rotations	a) Active Rotations	a) Which rotation(s) does this evaluation apply to?	• Block Schedule rotations (for the Evaluator and Subject status types defined in the People tab)
Questionnaire	a) Current Questionnaire b) Milestones by rotation (as applicable)	a) Is this the correct questionnaire content we want to assign for the evaluation? b) Do we want specific milestones to show up depending on rotation?	• Questionnaire bank in **Evaluations>Questionnaires** • Milestone configuration in **Evaluations>Milestones>Rotation**

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Settings	a) Delinquent notifications b) Anonymity Settings c) Consecutive days (advanced setting)* d) NET option (advanced setting)	a) Do we want late notice emails going to evaluators, and if so how often? b) Should subjects be able to see completed evals, and who the evaluator was? Should we keep evals completely anonymous from everyone? c) Should we set a minimum count of days worked together to prompt an evaluation?* d) Should we allow evaluators to pass up evaluations and not complete them?	• Contact information draws from initial creator of session, but is editable • Evaluator/subject block schedules for consecutive days setting
Match Schedule	a) Enable Automatic Matching b) Add New Interval/Interval schedule creation	a) Will this be an automatic match or manual match?* b) How many times throughout the year do we want to distribute these evaluations? When do we want them available, and with what due dates?	The match schedule is where all configurations come together for automatic matching. For each interval, it looks at the Start/End dates (**Match Schedule** tab) and matches up all evaluator status types (**People** tab) on your defined rotations (**Rotations** tab) with all subject status types (**People** tab) on the same rotations within that date range to create eval matches. It also checks against applicable settings from the **Settings** tab.

**See Automatic Matching vs. Manual Matching guide for further help. Your PD may not necessarily know which method to use without further guidance.*