THE BASICS OF E*VALUE
December 2016
EVERYTHING YOU NEED TO KNOW ABOUT:
DUTY HOURS
ACGME Duty Hour Violation Rules

Rule 1: 24 hour break in a week, 4 days off in 28 days
Rule 2: 80 hour work week
Rule 3: Shift length cannot exceed 24 hours for PGY 2 thru PGY 8
    Shift length cannot exceed 16 hours for PGY 1’s
Rule 4: 10 hour break between shifts is recommended, 8 hour break is required

Logging Duty Hours in E*Value:
Trainees have 15 task choices to choose from when logging their duty hours.

- Clinical Hours Worked
- Research Hours Worked
- In-House Call
- On Call at Home
- Called in From Home
- Internal Moonlighting
- External Moonlighting
- Orientation
- Didactic
- Educational Leave
- Leave of Absence
- Vacation
- Sick Time
- Day Off
- PTO
MOST COMMON DUTY HOUR MISTAKES

• Trainees do NOT log their weekends.
• Trainees do NOT log their days off.
• Trainees enter weekends off as 1 entry instead of 2.
• When a trainee’s shift rolls over to the next day, and then they have the rest of the day off – they do not make the day off entry because they already see something on that day.
• On Call at Home, Called in From Home, and In-House call are often entered incorrectly.
CORRECTING / EDITING DUTY HOURS

- If a trainee calls and tells you they made an error when they entered their duty hours, these are the steps you would take to fix it for them.
  - **For a trainee to fix it** – tell them to click on the entry they made in the actual duty hours calendar and an edit box will appear.

1. Click Time Tracking tab
2. View & Edit Trainee Submitted Hours

Log Time
View & Edit Trainee Submitted Hours
CORRECTING/EDITING DUTY HOURS

• Select the month and the name of the trainee. Then click “View Duty Hours”.
  • If the trainee is fixing it, they won't need to select a name
CORRECTING/EDITING DUTY HOURS

1. Click on the underlined entry on the actual calendar.
2. An “Edit Hours Entry” box will pop up. Make corrections here.
3. Click update.
How to run a Compliance Report
- should be run every 2 weeks

1. Click on Reports tab
2. Time Tracking Compliance
When you run your report, you should run it from the 1st of the month thru the current date (see example below)

The report will automatically default to less than or equal to 99%. This means it will only show you trainees that are **NOT** compliant.
TIME TRACKING (VIOLATIONS REPORT)

• How to run a Violations Report
  • should be run on the 5th of the following month

1. Click on Reports tab
2. Time Tracking Violations
**TIME TRACKING (VIOLATIONS REPORT)**

- Enter the start & end dates for the month you want to see the violations for.

The Shift Separator will default to 120 minutes.
**TIME TRACKING (VIOLATIONS REPORT)**

- The type of violation is shown at the top of the column
- The # of violations will appear in red, highlighted in light yellow
- To view the violation(s), click on the light yellow section

![Time Tracking Violations Report](image)
DUTY HOURS - REMINDERS

• Reminders for every program are set up to go out as follows:
  • A trainee can go 10 days without logging any duty hours before they are
    sent an email reminding them to log.
    • Once that email is sent to them, 5 more days can pass before a follow-up email is
      sent (if the trainee still has not logged any duty hours)
  • The email administrator (and possibly the program director depending
    on if the PD wants to receive them) will receive an email notification that
    they have a trainee that has not been logging their duty hours after the
    trainee has not logged for 16 days.
    • They will receive a follow-up email 5 days after that if their trainees still have not
      logged anything.
    • You will receive the same email when someone logs a day in the future, if your
      program is set up to receive those notifications. You just have to read carefully to
      see which notification you are receiving.

Note: If a trainee logs even 1 day, during that first 10 day time frame, they will not receive
an email reminder, even though they have only logged 1 day. It is up to the coordinator to
make sure that their trainees are compliant by the 5th of the following month.
EVERYTHING YOU NEED TO KNOW ABOUT: SCHEDULING
HOW TO CREATE TIME FRAMES

- Every year you must create new time frames

1. Click on the Schedules tab
2. Create & Manage Time Frames
3. Select the academic year that you want to create the time frames for
4. Click Show/Add Time Frames
HOW TO CREATE TIME FRAMES

- Name time frame & select dates that correspond with it
- Documentation notification date should be approximately 5 days before rotation starts.
- Evaluation generation date should be approximately 10 days before rotation ends.
HOW TO CREATE/ADD AN ACTIVITY

• If you ever have a new rotation you need to add in E*Value, you must create a new activity.

1. Click Schedules
2. Click Create & Manage Activities
HOW TO CREATE/ADD AN ACTIVITY

• To create an activity, follow the steps below.
• After you click add activity, it will ask you if you want to link this activity to existing evaluations. Go ahead and click no. You can go through and add them later. (see linking evaluations on pages 29-31)

1. Name the activity
2. Select which hospital the rotation will be at
3. Add Goals & Objectives (see adding goals & objectives on pages 19-20)
4. Click add activity
HOW TO ADD GOALS & OBJECTIVES

• To add Goals & Objectives to an activity:

1. Click Schedules

2. Click Create & Manage Activities

3. Click on the edit button in the far left column labeled “Action” of the activity you want to add the G&O’s to.

**You can still add G&O’s even if it is locked by your GME office**
4. To upload a new document click on the folder with a magnifying glass icon. Once it is in the available box, click on it and then hit the green button with a plus on it. This will move it to the selected box.

5. Click update activity
HOW TO ADD/EDIT SCHEDULES

• To add your schedules:
  • *Note: Pediatrics – your program will use the Import Schedule (OnCall) tool to upload from Amion.

1. Click on the Schedules tab
2. Schedule Management
3. Create & Manage Schedules
4. View Schedule
HOW TO ADD/EDIT SCHEDULES

1. To add a schedule, follow the steps on this page:

   1. Click on the blue, underlined activity name
   2. Select a time frame
   3. Select person you want to schedule (trainee or educator).
      * You can scroll through the list or type their name in the filter box to find them.
   4. Click Add Schedule Entry

   NOTE: The evaluation action is usually “both”, but if you want the person you are scheduling to:
      • be evaluated but not evaluate anyone, you’ll select “is”
      • complete an evaluation but not be evaluated themselves, you’ll select “does”
HOW TO ADD/EDIT SCHEDULES

- To double check & make sure everything is set up to go out correctly – exit out of the last page so that you are back on the main scheduling page.

- Click on the icon that looks like a spiral – it is above every schedule.
HOW TO ADD/EDIT SCHEDULES

- A screen will pop up that looks like the below screenshot.
- If everything is in **green**, then everything is correct.
- If anything is in **red**, then something is wrong & you should call your GME coordinator because that means the evaluations are not set to go out.
- If something is in **orange**, then the evaluation will not go out on its own and you should call your GME coordinator and ask them to force out the evaluation(s) for you.
HOW TO ADD DEFAULT EDUCATORS

• If you have an educator that will always be on a specific rotation, you can make them a default educator so that any time you schedule a trainee the default educator will automatically be scheduled in with them.

• NOTE: If you are using WDYWW for an activity that you have a default educator setup in, the default educator will receive an evaluation whether the trainee picks them or not.

1. Click on Schedules tab

2. Click on Set Default Educators for Activities
HOW TO ADD DEFAULT EDUCATORS

1. Select the activity from the drop down

2. Pick the educators you want to be the default educators from the Available Educators box.

3. Select the evaluation action. (might not always be “both”)

4. Click the green + button to add them to the “Assigned Educators” box.
EVERYTHING YOU NEED TO KNOW ABOUT: EVALUATIONS
WHO DID YOU WORK WITH (WDYWW)

- WDYWW is an evaluation/scheduling option
- How it works:
  - An activity is linked to a WDYWW evaluation.
    - The WDYWW evaluation is linked to a people group.
      - The people group has all of your educators in it so that the trainees can scroll through and choose who they worked with so you don’t have to find out from them and then schedule the educator in.
  - Once the trainee selects their educator, E*Value will then send the selected educators & the trainees the evaluations they need to complete
- Key Points/Pluses for using it:
  - You only have to schedule your trainees in the schedule. No more scheduling educators.
  - Fewer suspended evaluations because trainees are assigned to the wrong educator & vise versa.
To view linked evaluations:

- To see which evaluations are linked to what activity follow these steps.
- This is also where you will go to make sure that all of your evaluations are up to date.

1. Click Evaluations tab
2. Link Evaluation Forms to Activities
3. Click Next.

Note: Your program’s list of evaluation types might not look exactly the same as this.
TO VIEW LINKED EVALUATIONS

- Each number on this page corresponds to an evaluation. Click on the number and a copy of the evaluation will pop up.
- If there is not a number in one of the columns for an activity, that means that evaluation is not linked & will not go out to those scheduled in that activity.
- To link an evaluation, see section on linking evaluations on pages 29-31.

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<td></td>
<td>23571</td>
<td>27106</td>
<td>226991</td>
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<td>1029</td>
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</tbody>
</table>
• First, you must select the activity/rotation you want to link the evaluation to by clicking on the blue underlined in the far left column (see arrow below).
1. A list of all existing evaluation types in your program will appear. Find the one you are looking for and then select the correct evaluation number from the drop down list.
   - Note: You can preview the evaluation to make sure it is the correct one by clicking preview after you have selected an evaluation number.

2. Once you have linked all of the evaluations you want to link and confirmed they are correct, click “Next”

3. On the next page, if you need to link another evaluation in another activity, repeat the process. If you are done, scroll to the bottom and click “Update”

4. On the next page, you should be able to see the new evaluation number you have linked. If you do not then you need to go back and check. If you do see it, then click “Finish”.

2. Click Next

1. Select evaluation # from the drop down

3. Click Update

4. Click Finish
HOW TO LINK AN EVALUATION TO AN ACTIVITY

• After you click “Finish” on the previous page, if you see a page that looks like the screenshot below then you will know that you have completed the process.
  • Note: If you do not see this page then the evaluation has not been linked.

<table>
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<th>Activity Description</th>
<th>Evaluation Type</th>
<th>Form ID Change</th>
<th>Change Date</th>
<th>Change Time</th>
<th>Change By</th>
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<td>2:53:13 PM EST</td>
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<td>Milestone</td>
<td>Resident - Milestones</td>
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<td>ST LUKYFJM</td>
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<td>11:53:03 AM EDT</td>
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<td>ST LUK HQ1</td>
<td>Year 1</td>
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<tr>
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<tr>
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<td>Year 1</td>
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<td>03/00/2014</td>
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<td>RESEARCH</td>
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<td>End-of-Year Program Evaluation</td>
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<td>ST LUK NUCLEAR 2</td>
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AD HOC EVALUATIONS
(PREVIOUSLY ON-THE-FLY)

• An evaluation that a trainee or educator can complete at any time without E*Value having to send it to them.
  • You will not be able to see this option unless you have the role of trainee or educator.

• To add an Ad hoc evaluation, please contact your GME coordinator.
HOW TO REOPEN OR DELETE AN EVALUATION

- You can make adjustments to evaluations that are pending completion, completed, or have been suspended by a trainee or educator.

1. Click on the Evaluations tab
2. Manage Evaluator’s Assigned Evaluations
HOW TO REOPEN OR DELETE AN EVALUATION

3. Type in the last name of the person’s evaluation you need to make an adjustment to.

4. Click the appropriate "retrieve" button to pull up all pending, completed, or suspended evals.
HOW TO REOPEN OR DELETE AN EVALUATION

• Once you choose to retrieve a pending, completed, or suspended evaluation, scroll down to view the evaluations. The far right column(s) will give you the option(s) to either re-open or remove the evaluation.

• You can also use this tool to look & see whether or not an evaluation has gone out, been completed, or why it was suspended (if the person put a reason).

• **Retrieve Pending Evaluations**: You can remove/delete a pending evaluation if it went out in error.

• **Retrieve Completed Evaluations**: You can re-open a completed evaluation so that the person in question can complete it again.
  
  • To delete a completed evaluation you will first need to re-open it from the completed section, and then remove it from the pending section.

• **Retrieve Suspended Evaluations**: You can re-open OR remove suspended evaluations.
• There are 4 main reports you’d most likely run.

1. Click on the Reports tab

**Aggregate Trainee Performance:** will give you the mean, scale and standard score for all evaluations completed about a trainee.

**Completed Evaluations by Evaluator:** are evaluations completed by the trainees

**Aggregate Comments about Trainees:** will show you the comments made about the trainees

**Evaluation Trainee Reports**
- View Comments about User Group
- Aggregate Comments about Trainees
- Aggregate Milestone Performance
- Aggregate Trainee Performance
- Aggregate Performance by Trainee Group
- Completed Evaluations about Trainees
- Completed Evaluations by Evaluator
- Evaluation Scores by Question
- Individual Score Comparison to People Group
- Milestone Achievement
- Performance by Question Group
- Radar Chart Comparison
- Bank Comparison
- Trainee Compliance Audit Log
- Trainee Evaluation Crosstab
- Trainee Grade Summary
You can also run the same 4 reports for educators.

1. Click on the Reports tab

**Completed Evaluations about Educators:** are evaluations completed by educators about the educators.

**Aggregate Comments about Educators:** will show you the comments made about the educators.

**Aggregate Educator Performance:** will give you the mean, scale and standard score for all evaluations completed about an educator.

**Completed Evaluations by Evaluator:** are evaluations completed by the educators.
You can run Aggregate Performance and Comments Reports for your Activities, if you have those evaluations set up in E*Value. These are not used as often.

1. Click on the Reports tab
• When you run any evaluation report, the system default is to pull data based on the evaluation generation date (request date).

• If you are running a report for previous years or previous trainees, make sure you select “All Users” from the drop down next to the Last Name Filter.
  • The system automatically defaults to pull reports on “Active Users”, so you’ll need to change it if you want the report to include those trainees that have already graduated.
POST OFFICE (SENDING LOGIN)

• You must send your trainees their E*Value username and password through the Post Office tool.

1. Click on the Program Management tab

2. Post Office

Contact Users
- Create & Manage Custom Email Text
- Create & Manage Email Templates
- Create & Manage Program/Event Reminders
- Post Office
- Send Evaluation Reminders
- View & Resend Sent Emails

Information Sharing
- Create & Manage Homepage
1b. Select the person(s) you want to send their login info to.

1a. Add recipients (see screenshot to the right)

2. Click “Yes”

3. Add Subject Line

4. You must type something in the body of the email.

5. Click Next

1c. Click Done
You must hit “Send” in order for the email to go out.

1. Hit Send
HOW TO ADD BIOGRAPHICAL DATA

- All coordinators are responsible for adding specific biographic data for each of their trainees.

1. Click on the Users tab
2. Create & Manage Users
HOW TO ADD BIOGRAPHICAL DATA

• Select the User from the filter and then click “view/edit user”.

• Please make sure to add the below items for each of your trainees. GME will add everything else.
  • BCM email
  • BCM ID #
  • Social Security #
  • NPI Number
EVERYTHING YOU NEED TO KNOW ABOUT:

ADDING A DOCUMENT TO YOUR HOMEPAGE
HOW TO ADD DOCUMENTS TO YOUR HOMEPAGE

• You can add documents to your program’s homepage that you wish active users in your program to see.
  • *NOTE: You can choose which roles you want to be able to see certain things.*

1. Click on Program Management tab

2. Click Create & Manage Homepage
Create & Manage Homepage

No items currently entered.

3. Click Add Item
 HOW TO ADD DOCUMENTS TO YOUR HOMEPAGE

1. Enter a name/title for whatever you are adding (ex: PLOA's)

2. Select the rank or role that you want to be able to see the information you are adding

3. Click the green + button to add them to the selected box.

4. Choose how you want the document to display.

5. Select “general purpose” from the drop down list.

6. Select document from Available box.

6b. If the document is not listed you can add a new document here.

7. Click the green + button to add them to the selected box.

8. Click Save