EVALUATIONS

The Fundamentals

Program Director Workshop

July 24, 2017
OBJECTIVES

- Review ACGME requirements for different types of evaluations
- Review additional USF evaluation requirements
- Identify challenges and misconceptions regarding evaluations
- Learn and understand how ON-DEMAND evaluations can help overcome some challenges
- Recognize how evaluations, set-up and completed properly, can feed data into CCC and Semi-annual Milestone meetings as well as Faculty Year End Reports
**EVALUATION TYPES**

- **Formative Evaluations**
  - Used to assess ongoing learning and performance
  - Used to shape and improve performance, competence, behavior, activities, etc., as necessary
  - Occur frequently

- **Summative Evaluations**
  - Used to assess mastery of a concept or performance *at a point in time*
REQUIRED FORMATIVE EVALUATIONS
RESIDENT EVALUATION

Resident Evaluation

• A type of formative evaluation
• Faculty must evaluate resident performance in a **timely manner during each rotation** or similar educational assignment, and **document** this evaluation at completion of the assignment.

• Evaluated in 6 core competencies
• Evaluated on the specialty-specific milestones
Semi-annual Evaluation

- Provide each resident with documented semiannual evaluation of performance with feedback.
- Completed by PD or advisor
The program must use multiple evaluators (in addition to faculty)

- Peers
- Patients
- Self
- Other professional staff (e.g., education coordinator, other healthcare providers)

CAUTION: Know your program-specific requirements; some of these evaluation types may be REQUIRED.
Summative Evaluations

• The specialty-specific Milestones must be used as one of the tools to ensure residents are able to practice core professional activities without supervision upon completion of the program.

• The program director must provide a summative evaluation for each resident upon completion of the program.
  – PD verifies that the resident has demonstrated sufficient “competence to enter practice without direct supervision”
  – End of program
Program Evaluation

Residents and faculty must have the opportunity to evaluate the program **confidentially** and in writing **at least annually.**
Faculty Evaluation

- At least annually, the program must evaluate faculty performance as it relates to the educational program.
- Include a review of the faculty’s clinical teaching abilities, commitment to the educational program, clinical knowledge, professionalism, and scholarly activities.
- Must include at least annual written confidential evaluations by the residents.
<table>
<thead>
<tr>
<th>Required Evaluations</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resident evaluation by faculty</td>
<td>At the end of a rotation</td>
</tr>
<tr>
<td>Semiannual evaluation</td>
<td>2 times per year</td>
</tr>
<tr>
<td>Milestones</td>
<td>2 times per year</td>
</tr>
<tr>
<td>Summative evaluation</td>
<td>1 time at program end</td>
</tr>
<tr>
<td>Program evaluation</td>
<td>At least 1 time per year</td>
</tr>
<tr>
<td>Faculty evaluation by residents</td>
<td>At least 1 time per year</td>
</tr>
</tbody>
</table>
Requirement #1

At a minimum, each resident must have 2 completed evaluations by faculty per year

- Evaluations must be completed by faculty
- This requirement applies to all programs – accredited and non-accredited

Requirement #2

Evaluations-Milestones Mapping

- This requirement applies to accredited programs only
- Verify set-up annually
- If add/modify evaluations ensure milestone mapping is modified accordingly
EVALUATION FORMS CAN BE ENTERED INTO NEW INNOVATIONS AS A WORD DOC. OR PDF.

MYTH

FACT

Evaluation forms must be set up using NI’s Evaluation Form builder.
<table>
<thead>
<tr>
<th>Myth</th>
<th>Fact</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>You can easily change an evaluation form in the middle of an academic year</strong></td>
<td><strong>Fact</strong></td>
</tr>
<tr>
<td>Not so easy</td>
<td></td>
</tr>
<tr>
<td>– A new form has to be built</td>
<td></td>
</tr>
<tr>
<td>– The form has to be swapped out in all future sessions</td>
<td></td>
</tr>
<tr>
<td>– Skewed or misleading reports</td>
<td></td>
</tr>
</tbody>
</table>
MYTH OR FACT?

ONCE EVALUATIONS ARE SET UP THEY REQUIRE NO FURTHER ATTENTION OR MONITORING

**MYTH**

**Fact**

Education coordinators need to regularly monitor evaluations

- Verify evaluator/subject matches made
- Ensure evaluations are being completed
- Create reports (e.g., CCC)
<table>
<thead>
<tr>
<th>Myth</th>
<th>Fact</th>
</tr>
</thead>
<tbody>
<tr>
<td>It is sometimes impossible to set up evaluations because you don't know who your trainees are working with.</td>
<td>Not impossible. NI feature that can be used to solve this issue.</td>
</tr>
</tbody>
</table>
✓ Having to STOP and find a PC to login into NI and complete an evaluation ...
✓ Having to schedule time with the resident to review performance ...
✓ Not enough time spent with the resident (i.e. 2 days) and by the time evaluation is sent to complete, the resident is “forgotten”
✓ Being matched with a resident that wasn’t on service at all due to a rotation switch
There are 2 ways to create and/or complete evaluations

1. AUTOMATICALLY (Traditional)
2. ON-DEMAND (NEW)
Schedule Driven:

Automatic Matching

- Enable Automatic Matching - the system will automatically create matches with personnel on the department block schedule for each interval.
- Match intervals [4] days before the available date.
- Send an email [0] weekdays before the interval match date to this address [ ] as a reminder that matches will be made.

Resident Block Schedule

<table>
<thead>
<tr>
<th>Date</th>
<th>Date</th>
<th>Department</th>
<th>MED/Internal Medicine</th>
<th>Program Director</th>
</tr>
</thead>
<tbody>
<tr>
<td>7/17/2017</td>
<td>8/13/2017</td>
<td>DM/IM: WARD TEAM B-TGH</td>
<td>Department of Medicine</td>
<td>MED/Internal Medicine</td>
</tr>
</tbody>
</table>

Attending Schedule

<table>
<thead>
<tr>
<th>Date</th>
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<th>Department</th>
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<th>Program Director</th>
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</thead>
<tbody>
<tr>
<td>7/1/2017</td>
<td>7/30/2017</td>
<td>DM/IM: WARD TEAM B-TGH</td>
<td>Department of Medicine</td>
<td>MED/Internal Medicine</td>
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Evaluation Session

<table>
<thead>
<tr>
<th>Program Director</th>
<th>PRG 3</th>
<th>Department</th>
<th>MED/Internal Medicine</th>
<th>Start</th>
<th>End</th>
<th>Available</th>
<th>Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRG 3</td>
<td>DM/IM: WARD TEAM B-TGH</td>
<td>Department of Medicine</td>
<td>MED/Internal Medicine</td>
<td>7/17/2017</td>
<td>7/30/2017</td>
<td>7/21/2017</td>
<td>8/13/2017</td>
</tr>
</tbody>
</table>
NEW – ON DEMAND

Very similar to choosing a TV show or movie to watch when **YOU WANT TO** ...

Residents and Faculty can choose to REQUEST or COMPLETE an evaluation on someone they may have NOT been matched to automatically.
The simple steps to REQUEST an evaluator:

*(currently being used by Internal Medicine residents on Elective Rotations)*

1. In the notifications section under Residency Evaluations you can “request evaluator”
2. Choose the evaluator from the drop down menu
3. Choose which FORM you’d like the evaluator to complete
4. Add a message and/or send request
When RESIDENTs or FACULTY want to complete an evaluation on someone that wasn’t matched with them ...

1. In the notifications section under Residency Evaluations you can “evaluate subject”
2. Choose the subject from the drop down menu
3. Choose which FORM you’d like to complete
4. Choose the rotation and interval dates from the drop down menu
Faculty and Residents can also complete evaluations where they have been automatically matched using the ARMIS APP.

The Armis APP can be used to complete assigned evaluations or create an On Demand evaluation for someone to evaluate you or choose a subject to evaluate.
Quick Guide

**OnDemand**
Push to request an evaluation or complete an immediate subject or rotation evaluation.

**Evaluations Status**
Shows your total, overdue, in progress, and new evaluations.

**Evaluations List**
Shows the evaluations that are in your queue to complete. Click to complete the evaluation. Pull down to refresh your list.
Using both ON DEMAND evaluations and/or the ARMIS APP can meet the requirements for ...

✔ Specific and Timely feedback
✔ More accurate resident to faculty matches which will provide accurate and documented information for the CCC Meetings
✔ Assist attendings with the 80% on-time completion rate

WORK
SMARTER
NOT
HARDER
INTERNAL MEDICINE
EVALUATION PROCESS

✓ Evaluation is made AVAILABLE the first Friday AFTER the START of a rotation
✓ Evaluation is made DUE 14 days AFTER the rotation ENDS
ASSIGNED: this is the total number of evaluations assigned to you for completion

COMPLIANCE: this is the percentage of total completed evaluations

14 DAY COMPLIANCE: please disregard; data is not accurate (ONLY for Internal Medicine)

COMPLETED ON TIME: this is the percentage of evaluations completed on time. Completed on time means that the evaluations were completed BEFORE or ON the due date for that evaluation. DUE DATES are 14 days AFTER the end of the rotation.

COMPLETED LATE: this is the percentage of evaluations completed late. Completed late means that the evaluations were completed AFTER the DUE DATE.

AVAILABLE (info not included in report): All evaluations become available for completion on the FRIDAY AFTER the rotation start date

EXAMPLE:
Rotation period: 4/3/2017 – 4/30/2017
  ○ 4/3/2017 = rotation start date - evaluation becomes AVAILABLE on 4/7/2017
  ○ 4/30/2017 = is the END of the rotation

Evaluation DUE DATE: 5/14/2017 (14 days AFTER end of rotation)
  If the evaluation is completed on 5/13/2017 it is then COMPLETED ON TIME
  If the evaluation is completed on 5/24/2017 it is then COMPLETED LATE
Increased faculty and resident engagement
Increased accuracy in matches / CCC Data
More specific documented feedback
Increased ACGME Resident Survey results
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