

To login to E\*Value please go to [www.evaluate.musc.edu](http://www.evaluate.musc.edu) and login with your MUSC NetID and password.

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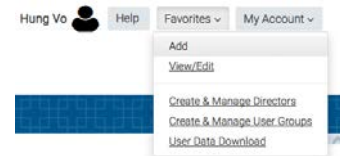
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### Favorites

#### Bookmarking favorites in E\*Value

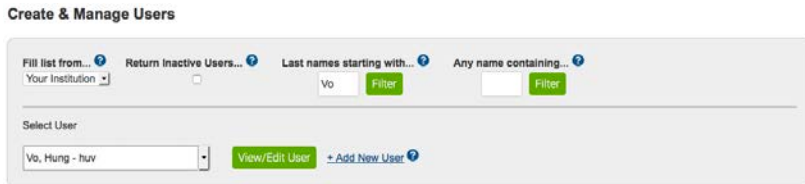
1. Go to the page you would like to save as a favorite.
2. Click **Favorites** located on the upper right corner.
3. Click **Add** and this will bookmark this page as a favorite on the favorites tool bar.



### Users

#### Viewing the resident biographic data

1. Go to **Users** → **User Management** → **Manage Users** → **Create & Manage Users**.
2. Enter the resident’s last name under **Last name starting with...** and click the **Filter** button.
3. Select the resident under **Select User** and click **View/Edit User** button.



#### Managing user groups

1. Go to **Users** → **User Management** → **User Setup** → **Create & Manager User Groups**.
2. Select the **Edit** button on the group that you want to manage.

Note: Please **DO NOT** add, remove or delete the following groups:

- o All Resident
- o Matriculating Resident
- o Matriculates to be Oriented
- o Chief Residents
- o Program Coordinators
- o Program Director Schedules

## Scheduling

1. Go to **Schedules** → **Schedule Management** → **Manage Schedule** → **Create & Manage Schedules**.
2. Click **View Schedule** button to view the schedules.
  - a. Optional: Change the **Activity** to the specific activity for which you are looking.
  - b. Optional: Change the **Time Frames** to the specific time frame for which you are looking.

## Creating time frames

1. Go to **Schedule** → **Schedule Setup** → **Time Frame Setup** → **Create and Manage Time Frames**.
2. Click the **Show/Add Time Frames** button.
3. Enter the new Time Frame label in the text box.
4. Select the Begin and End Date for your Time Frame.
5. Select the date for the Document Notification Date.  
*Note: If there are no documents attached to the activity, then this date will be ignored.*
6. Select the date for the Evaluation Generation Date.  
*Tip: I recommend that evaluations generate at least 5 to 10 days before the end of the activity.*

### Time Frames

Create Multiple Time Frames ?

Time Frame Label:

Begin Date: Jul. ↓ 01 ↓ 2016 ↓

End Date: Jul. ↓ 31 ↓ 2016 ↓

Document Notification Date: ? Jul. ↓ 01 ↓ 2016 ↓

Gen Date(s)	Use
Jul. ↓ 20 ↓ 2016 ↓	<input checked="" type="checkbox"/>

7. Click **Add Time Frame** button to finish creating the Time Frame.

## Creating multiple time frames

1. Go to **Schedule** → **Schedule Setup** → **Time Frame Setup** → **Create and Manage Time Frames**.
2. Click the [Create Multiple Time Frames](#) hyperlink.
3. Select **calendar month(s)** to define the base reoccurrence for your Time Frames in the field labeled **I want to base my Time Frames on**.
4. Select the first month for which you would like to generate Time Frames from the drop-down menu in the field labeled **What is the first month...**  
*Note: The list will default to the current month.*
5. Select the number of Time Frames you wish to create. You can create up to one year's worth of Time Frames (12) at a time.


6. Indicate when you want the evaluations to generate within your Time Frames by entering a number of days and selecting the appropriate option from the drop-down menu.  
*Tip: I recommend that evaluations generate at least 5 to 10 days before the end of the activity.*
7. Indicate when you want the Curriculum Notifications to generate within your Time Frames.  
*Note: If there are no documents attached to the activity, then this date will be ignored.*
8. Once you have made your selections, click the **Continue** button. You will be able to review the Time Frames on the next screen before they are created. A table summarizing the information will appear. If you are satisfied with the Time Frames, select the **Create Time Frames** button. You will see a confirmation that your Time Frames have been created. If you are not satisfied with your Time Frames, select the **Back** button to modify your criteria.


I want to base my Time Frames on: calendar month(s) ▾

---

What is the first month for which you would like to generate Time Frames? July 2017 ▾

How many Time Frames would you like to create? 12 ▾

Evaluation Generation Dates: 

Gen Date(s)	Use
When should Evaluations generate? 10 Days Before Time Frame End Date ▾	

When should Curriculum Notifications be sent? 1 Days Before Time Frame Begin Date ▾

**Continue** →

### Setting default educators to pre-populate in the rotations

1. Go to **Schedules** → **Schedule Setup** → **Activity Setup** → **Set Default Educators for Activities**.
2. Select the activities to be assigned from the drop-down menu.
3. Select the educators name from the Available Educators list.
4. Select the evaluation action from the drop-down menu.
5. Once you have selected the educators and an evaluation action, select the Add icon to assign the educators to the activity.

### Evaluations

#### Completing an Adhoc Evaluation (On-the-Fly)

1. Go to **Evaluations** → **Evaluation Management** → **Manage Evaluations** → **Initiate Adhoc Evaluations**  
or  
Go to **Home** → **Evaluations** → **Initiate Ad hoc Evaluations**.
2. Select the evaluation type you would like to create under Select an evaluation type.
3. Indicate the subject of the evaluation under Who would you like to evaluate.
4. Select the rotation that this activity is based on under Activity.
5. Select the time period that this evaluation will apply to under Time Frame.

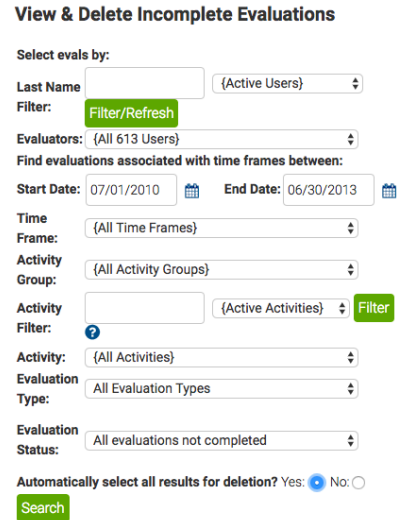
6. Click the **Next** → button to create your evaluation.

### Viewing evaluation forms

1. Go to **Evaluation** → **Evaluations Management** → **View Evaluations** → **View Evaluation Forms**.
2. Click the **Next** → button and click on the evaluation number with a [hyperlink](#) to view the evaluation.

### Viewing and delete incomplete evaluations

1. Go to **Evaluation** → **Evaluations Management** → **Manage Evaluations** → **View & Delete Incomplete Evaluations**.
2. Select the Start Date and End Date.
3. Click **Yes** to automatically mark all results returned for deletion.
4. Click the **Search** button.
5. Indicate those items that should be deleted with a check box in the **Remove** column.  
*Note: Items may already be checked if you indicated that results should be automatically selected.*
6. Click either of the **Delete Selected Evaluations** buttons to remove the incomplete items. You will be prompted to confirm the deletions; select **OK** to continue. A dialogue box will notify you that the items were deleted.



**View & Delete Incomplete Evaluations**

Select evals by:

Last Name:  (Active Users) ↓

Filter:

Evaluators: (All 613 Users) ↓

Find evaluations associated with time frames between:

Start Date:   End Date:

Time Frame: (All Time Frames) ↓

Activity Group: (All Activity Groups) ↓

Activity Filter:  (Active Activities) ↓

Activity: (All Activities) ↓

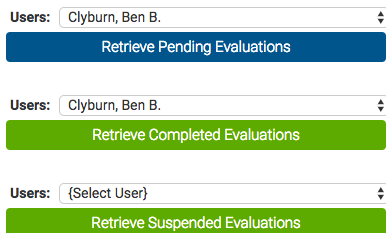
Evaluation Type: All Evaluation Types ↓

Evaluation Status: All evaluations not completed ↓

Automatically select all results for deletion? Yes:  No:

### Retrieving pending evaluations

1. Go to **Evaluation** → **Evaluations Management** → **Manage Evaluations** → **Manage Evaluator's Assigned Evaluations**.
2. Enter the user last name.  
Use this filter to narrow the list of users...
3. Find the user of interest in the pull-down menu above the **Retrieve Pending Evaluations** button.
4. Click the **Retrieve Pending Evaluations** button to reveal the list of pending evaluations for that particular user.



Filter by User Last Name:

Users:  ↓

Users:  ↓

Users:  ↓

## E\*Value: How-To Instructions for the Program Coordinators



- You may delete a pending evaluation by clicking on the **Remove** radio button next to the pending item in question.

Id	Name	Time Frame	Request Date	Activity	Type	Subject	Status	Remove All
61680633	Ben B. Clyburn	May	06/02/2016	Gen Med-New	Milestones Evaluation PGY1	Vo, Hung	Open	<input type="radio"/> Remove <input checked="" type="radio"/> Do Not Remove <input type="radio"/> Remove <input checked="" type="radio"/> Do Not Remove

*Note: By clicking on the **Remove** radio button in the "Remove All" header, which will select all pending evaluations.*

- Once you have made your selection hit the **Submit** button.

### Retrieving completed evaluations

- Go to **Evaluation → Evaluations Management → Manage Evaluations → Manage Evaluator's Assigned Evaluations.**
- Enter the user last name.

Use this filter to narrow the list of users...

Filter by User Last Name:

- Find the user of interest in the pull-down menu above the **Retrieve Completed Evaluations** button.
- Select the **Retrieve Completed Evaluations** button.

Users: Clyburn, Ben B.

Users: Clyburn, Ben B.

Users: (Select User)

- A list of evaluations that have been completed by the user will populate in the bottom portion of the screen.
  - Selecting the **With Notice** radio button will reopen the evaluation and will allow you to type a message that will be sent in an email to the evaluator.
  - Selecting the **Without Notice** radio button will reopen the completed evaluation without sending an email to the evaluator.

Id	Name	Time Frame	Request Date	Activity	Type	Subject	Status	Re-Open All
63379818	Ben B. Clyburn	September	09/25/2016	Gen Med-New	Milestones Evaluation PGY1	Vo, Hung	Completed 10/03/2016	<input type="radio"/> With Notice <input type="radio"/> Without Notice <input checked="" type="radio"/> Do Not Re-Open <input type="radio"/> With Notice <input type="radio"/> Without Notice <input type="radio"/> Do Not Re-Open

Message to Ben B. Clyburn why 63379818 was re-assigned/re-opened:

*Note: Choosing an option in the "Reopen All" header will select that option for all completed evaluations.*

- Select the **Submit** button to reopen the evaluation.

### Retrieving suspended evaluations

If a user feels s/he has received an evaluation inappropriately, s/he has the option to suspend the evaluation. When a user chooses the suspend option, s/he is asked for a reason why the evaluation should be removed. After submitting the suspension request, an e-mail that includes the user's suspension reason is sent to the Program Coordinator.

When you receive a suspension e-mail message, you will need to resolve it using the **Manage Evaluator's Assigned Evaluations** tool.

1. Go to **Evaluation → Evaluations Management → Manage Evaluations → Manage Evaluator's Assigned Evaluations**.
2. Enter the user last name.

Use this filter to narrow the list of users...

Filter by User Last Name:

3. Find the user of interest in the pull-down menu above the **Retrieve Suspended Evaluations** button.

Users: Clyburn, Ben B.

Users: Clyburn, Ben B.

Users: Clyburn, Ben B.

4. Click the **Retrieve Suspended Evaluations** button to reveal the list of suspended evaluations for that particular user.

*Note: Depending on the reason for suspending the evaluation, you may take one of two actions. You may either permanently delete the evaluation from the user's pending list, or reassign the evaluation back to the original evaluator (in the event that they should not have suspended the evaluation).*

- a. To reassign that evaluation back to the user who suspended it and send him/or her a notice about the reassignment, select the **With Notice** radio button. You will be given the ability to type in a message that will be sent to the evaluator. This message can give details as to why the evaluation was reassigned.
- b. To reassign the evaluation back to the user who suspended it without sending him/or her a notice about the reassignment, select the **Without Notice** radio button.
- c. To delete the evaluation, select the radio button marked **Remove**.

Id	Name	Time Frame	Request Date	Activity	Type	Subject	Status	Re-Assign All	Remove All
41673950	Clyburn, Ben	September 2013	09/27/2013	UIM-New	Clinical Educator	Vo, Hung	Suspended	<input type="radio"/> With Notice <input type="radio"/> Without Notice <input checked="" type="radio"/> Do Not Re-Assign	<input type="radio"/> Remove

Message: did not work with Suspension Date: 10/24/2019

*Caution: Once an evaluation is removed from E\*Value, it cannot be retrieved. If you have removed an evaluation in error, you will need to create a new one.*

- Once an action is selected, you must select the **Submit** button for the action to take place.

## Time Tracking

Viewing resident submitted duty hours

- Go to **Time Tracking** → **Time Tracking Management** → **View & Edit Trainee Submitted Hours**.
- Select the **Duty Hours for Month** and select **Trainees**.
- Click the **View Duty Hours** button.

## Case Logs

Granting procedure privileges to an individual resident

- Go to **Case Logs** → **Case Log Management** → **Procedures Setup** → **Grand Privileges for Procedures**.
- Select the resident under Trainee Role.
- Select **{All Procedures}** under Procedures.
- Set the **Start** and **End** dates to either the first half, second half, or the academic year.
- Click the **Next** → button.
- Indicate all the procedures permission levels for the resident.
- Click **Submit** to apply the procedures permission levels for the resident.

Granting procedure privileges to PGY groups

- Go to **Case Logs** → **Case Log Management** → **Procedures Setup** → **Set Default Privileges for Procedures**.
- Select the **Apply** to assign the privilege template to the PGY group.

### Set Default Privileges for Procedures

Template Name	Create Date	Created By	Action
PGY 3	08/13/2007	Hasegawa, Becky	<a href="#">Apply</a> <a href="#">Edit</a> <a href="#">History</a>
PGY 2	08/13/2007	Hasegawa, Becky	<a href="#">Apply</a> <a href="#">Edit</a> <a href="#">History</a>
PGY 1	08/10/2007	Hasegawa, Becky	<a href="#">Apply</a> <a href="#">Edit</a> <a href="#">History</a>

- Select the **Subject Current Rank** and **Template to Apply** to assign the privilege to the PGY group. **Subject Current Rank** and **Template to Apply** should be the same PGY group.



- Click the **Next** → button and click the **Finalize** button to assign the procedures to your residents.

**Apply Procedure Privileges Templates**

Effective Date: 08/15/2016

People Groups: (All Groups) ▾

Subject Current Rank: PGY1 ▾

Last Name Filter:  (Active Users)

Trainees: (All Users) ▾

Template To Apply: PGY 1 ▾

**Setting up the level of supervision in the procedure list**

- Go to **Case Logs** → **Case Log Management** → **Procedure Setup** → **Create & Manage Procedure List**.

Action	Procedure ID	Procedure Name	Minimum Requirement	Minimum Competency Requirement	Maximum Evaluations To Be Assigned	Self Evaluation Type	Supervisor Evaluation Type	Competency Evaluation Question	Minimum Competency Score	External Codes	Status	Confirmation Method	Min Logged Before Tests Given
	42929	Above knee amputation	1	1	999	No Type Defined	Procedure Evaluation by Supervisor	Overall Performance Score	3 Competent without supervision (can accomplish alone at minimally acceptable levels)		Active	Active with evaluation	No Minimum Defined
	42932	Administration of oxygen and administrative devices	1	1	999	No Type Defined	Procedure Evaluation by Supervisor	Overall Performance Score	3 Competent without supervision (can accomplish alone at minimally acceptable levels)		Active	Active with competent evaluation No confirmation required	No Minimum Defined
	42933	Airway management	1	1	999	No Type Defined	Procedure Evaluation by Supervisor	Overall Performance Score	3 Competent without supervision (can accomplish alone at minimally acceptable levels)		Active	Active with competent evaluation	No Minimum Defined
	77480	Anal fistulotomy/kiton placement	1	1	999	No Type Defined	Procedure Evaluation by Supervisor	Overall Performance Score	3 Competent without supervision (can accomplish alone at minimally acceptable levels)		Active	Active with competent evaluation	No Minimum Defined
	4440	Arterial line placement	1	1	999	No Type Defined	Procedure Evaluation by Supervisor	Overall Performance Score	3 Competent without supervision (can accomplish alone at minimally acceptable levels)		Active	Active with competent evaluation	No Minimum Defined
	77475	Arteriovenous graft/fistula	1	1	999	No Type Defined	Procedure Evaluation by Supervisor	Overall Performance Score	3 Competent without supervision (can accomplish alone at minimally acceptable levels)		Active	Active with competent evaluation	No Minimum Defined
	42929	Aspiration breast cyst	1	1	999	No Type Defined	Procedure Evaluation by Supervisor	Overall Performance Score	3 Competent without supervision (can accomplish alone at minimally acceptable levels)		Active	Active with competent evaluation	No Minimum Defined

From the drop-down menu, indicate the **confirmation method** needed for the procedure. When you have made your selection, update the procedures by selecting the **Submit** button below the drop-down menu. All items with a check box in the **Action** column will update with the new confirmation method. Confirmation Methods include the following:

- Active** - This sends an email notice to the supervisor providing them with the details of the procedure and asking them to respond whether or not the details were accurate. The procedure will be pending until the supervisor responds.
- Active with evaluation** - The supervisor will be assigned an evaluation about the procedure. The procedure will be pending until the supervisor completes the evaluation.
- Active with competent evaluation** - The supervisor will be assigned an evaluation about the procedure. The procedure will be confirmed if the supervisor scores the trainee above the minimum competency level required.
- Passive** - This sends an email notice to the supervisor providing him/or her with the details of the procedure and asking him/or her to respond only if the details are NOT accurate. The procedure will be confirmed.
- No Confirmation required** - This does not send an email notice to the supervisor; the procedure will be confirmed.

- Next, go to **Case Logs** → **Case Log Management** → **Case Log Setup** → **Case Log Settings**.

▼ Supervisor Setup

- Which ranks, roles, or groups should populate the Supervisor select list on the logging screen?
 

4 selected
- Should the Supervisor select list on the logging screen include an option for "No Supervisor or Supervisor Not Listed"?
 

Yes  No
- Would you like to allow cross-program supervision?
 

Yes  No
- Should credentialing requirements restrict who is authorized to act as a Supervisor?
 

Yes  No

The Supervisor Setup section provides the opportunity to regulate items that show up on the Supervisor’s logging screen and assign abilities to Supervisors within E\*Value.

## Reports

Generating aggregate report data and comments for the resident

Aggregate performance about the residents

- Go to **Reports** → **Reports** → **Evaluation Trainee Reports** → **Aggregate Trainee Performance**.
- Set the **Start** and **End** dates to either the first half, second half, or the academic year.  
Optional: Change the **Activity** to the specific activity for which you are looking.
- Select the resident under **Trainee** and click the **Next** → button to view the resident’s aggregate data report.
- If this page is not in Expanded view, click **Expanded View** highlighted in either blue or purple.
- To see the comments, scroll down to the bottom of the page and click **Show Comments** highlighted in either blue or purple.

**IMPORTANT: Please make sure the comments are ANONYMOUS.**

Aggregate comments about the resident

- Go to **Reports** → **Reports** → **Evaluation Trainee Reports** → **Aggregate Comments about Trainees**.
- Set the **Start** and **End** dates to either the first half, second half, or the academic year.  
Optional: Change the **Activity** to the specific activity for which you are looking.
- Select the resident under **Trainee** and click the **Next** → button to view the residents’ comments report.

4. Select **View Anonymously** under **Anonymity Filter** and click the **Next →** button.  
**IMPORTANT: Please make sure the comments are ANONYMOUS.**

### Generating aggregate report data and comments for the attending

#### Attending aggregate performance reports

1. Go to **Reports → Reports → Evaluation Educator Reports → Aggregate Educator Performance**.
2. Set the **Start** and **End** dates to either the first half, second half, or the academic year.
3. Change only the **Activity** to the specific activity for which you are looking.
4. Select the attending under **Educators** and click the **Next →** button to view the resident's aggregate data report.
5. If this page is not in Expanded view, click **Expanded View** highlighted in either blue or purple.
6. To see the comments, scroll down to the bottom of the page and click **Show Comments** highlighted in either blue or purple.  
**IMPORTANT: Please make sure the comments are ANONYMOUS.**

#### Aggregate comments about educators

1. Go to **Reports → Reports → Evaluation Educator Reports → Aggregate Comments about Educators**.
2. Set the **Start** and **End** dates to either the first half, second half, or the academic year. Optional: Change the **Activity** to the specific activity for which you are looking.
3. Select the attending under **Educators** and click the **Next →** button to view the attending comments report.
4. Select **View Anonymously** under **Anonymity Filter** and click the **Next →** button.  
**IMPORTANT: Please make sure the comments are ANONYMOUS.**

### Generating activity reports and comments for the residency program

#### Activity report for the residency program

1. Go to **Reports → Reports → Evaluation Activity Reports → Aggregate Activity Performance**.
2. Set the **Start** and **End** dates to either the first half, second half, or the academic year.
3. Click the **Next →** button.

#### Activity aggregate comments for the residency program

1. Go to **Reports → Reports → Evaluation Activity Reports → Aggregate Activity Comments**.
2. Set the **Start** and **End** dates to either the first half, second half, or the academic year.
3. Select **View Anonymously** under **Anonymity Filter** and click the **Next →** button.  
**IMPORTANT: Please make sure the comments are ANONYMOUS.**

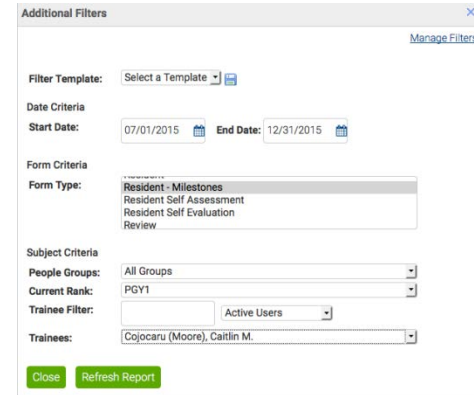
Generating milestone reports

Aggregate milestones performance

1. Go to **Reports** → **Reports** → **Evaluation Trainee Report** → **Aggregate Milestones Performance**.
2. Set the **Start** and **End** dates to either the first or second half of the academic year. Click the **Refresh Report** button.

Radar chart comparison

1. Go to **Reports** → **Reports** → **Evaluation Trainee Reports** → **Radar Chart Comparison**.
2. Set the **Start** and **End** dates to either the first or second half of the academic year. Click the **Refresh Report** button.
3. Go to **Additional Filters** +, select your Milestones under **Form Type**. Next, click the PGY rank under **Current Rank** and then select your resident under **Trainee**.
4. Click **Refresh Report** button.



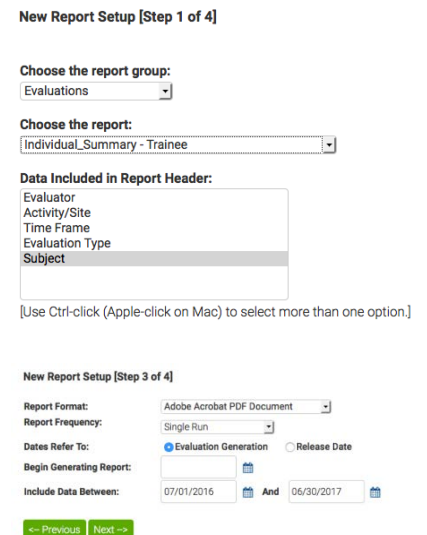
Milestone achievement

1. Go to **Reports** → **Reports** → **Evaluation Trainee Reports** → **Milestone Achievement** .
2. Set the **Start** and **End** dates to either the first or second half of the academic year. Click the **Refresh Report** button.
3. Go to **Additional Filters** +, select your Milestones under **Form Type**. Next, click the PGY rank under **Current Rank** and then select your resident under **Trainee**.
4. Click **Refresh Report** button.

Scheduling automated reports

Summary report for the residents

1. Go to **Reports** → **Reports** → **Request Automated Reports** → **Schedule New Automated Reports**.
2. Select **Evaluations** under **Choose the report group**.
3. Select **Individual Summary – Trainee Report** under **Choose the report**.
4. Select **Subject** under Data Included in **Report Header**.
5. Click **Next** → button and click the **OK** button when it asks you, **Do you really want All Users**.
6. Select **Single Run** under **Report Frequency**.
7. Click **Evaluation Generation** under **Dates Refer To**.
8. Select **today's date** to generate the evaluation under **Begin Generating Report**.



9. Select the **Start** and **End** dates for this academic year under **Include Data Between**.
10. Name your report under **Report Name** and click the **Finish** button.
11. Click **Review/Edit Report** button and click **Active** under the **Status** column to activate the report.

Summary report for the attendings

1. Go to **Reports** → **Reports** → **Request Automated Reports** → **Schedule New Automated Reports**.
2. Select **Evaluations** under **Choose the report group**.
3. Select **Individual Summary – Educator Report** under **Choose the report**.
4. Select **Subject** under **Data Included in Report Header**.
5. Click **Next** → button and click the **OK** button when it asks you, **Do you really want All Users**.
6. Select **Single Run** under **Report Frequency**.
7. Click **Evaluation Generation** under **Dates Refer To**.
8. Select **today's date** to generate the evaluation under **Begin Generating Report**.
9. Select the **Start** and **End** dates for this academic year under **Include Data Between**.
10. Name your report under **Report Name** and click the **Finish** button.
11. Click **Review/Edit Report** button and click **Active** under the **Status** column to activate the report.

New Report Setup [Step 1 of 4]

Choose the report group:  
Evaluations

Choose the report:  
Individual\_Summary - Educator

Data Included in Report Header:  
 Evaluator  
 Activity/Site  
 Time Frame  
 Evaluation Type  
 Subject

[Use Ctrl-click (Apple-click on Mac) to select more than one option.]

Next →

---

New Report Setup [Step 3 of 4]

Report Format: Adobe Acrobat PDF Document

Report Frequency: Single Run

Dates Refer To:  Evaluation Generation  Release Date

Begin Generating Report: [Calendar icon]

Include Data Between: 07/01/2016 [Calendar icon] And 06/30/2017 [Calendar icon]

← Previous Next →

Summary report for the residency program

1. Go to **Reports** → **Reports** → **Request Automated Reports** → **Schedule New Automated Reports**.
2. Select **Evaluations** under **Choose the report group**.
3. Select **Activity Summary – Sorted by Question Order – Activity** under **Choose the report**.
4. Click **Next** → button.
5. Select **Single Run** under **Report Frequency**.
6. Click **Evaluation Generation** under **Dates Refer To**.
7. Select **today's date** to generate the evaluation under **Begin Generating Report**.
8. Select the **Start** and **End** dates for this academic year under **Include Data Between**.
9. Name your report under **Report Name** and click the **Finish** button.
10. Click **Review/Edit Report** button and click **Active** under the **Status** column to activate the report.

New Report Setup [Step 1 of 4]

Choose the report group:  
Evaluations

Choose the report:  
Activity Summary - Sorted by Question Order - Activity

Data Included in Report Header:

[Use Ctrl-click (Apple-click on Mac) to select more than one option.]

Next →

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New Report Setup [Step 3 of 4]

Report Format: Adobe Acrobat PDF Document

Report Frequency: Single Run

Dates Refer To:  Evaluation Generation  Release Date

Begin Generating Report: [Calendar icon]

Include Data Between: 07/01/2016 [Calendar icon] And 06/30/2017 [Calendar icon]

← Previous Next →

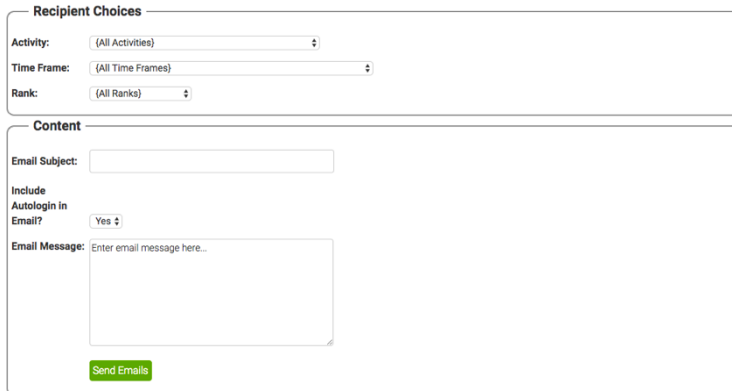
## Program Management

### Sending evaluation reminders

You can send a customized email reminder to ALL users who have pending evaluations regardless of when they were assigned.

1. Go to **Program Management** → **Communication Tools** → **Contact User** → **Send Evaluation Reminders**.
2. Select **Activity**.
3. Select **Time Frame**.
4. Select **Yes** under **Include Autologin in Email**.
5. Add your message on the **Email Message**.
6. Click the **Send Emails** button to generate the email reminders.

#### Send Evaluation Reminders



The screenshot shows a web form titled "Send Evaluation Reminders". It is divided into two main sections: "Recipient Choices" and "Content".

**Recipient Choices:** This section contains three dropdown menus. The first is labeled "Activity:" and has "(All Activities)" selected. The second is labeled "Time Frame:" and has "(All Time Frames)" selected. The third is labeled "Rank:" and has "(All Ranks)" selected.

**Content:** This section contains an "Email Subject:" text input field. Below it is a label "Include Autologin in Email?" with a dropdown menu set to "Yes". At the bottom of this section is a large text area labeled "Email Message:" with the placeholder text "Enter email message here...". A green "Send Emails" button is located at the bottom left of the form.