

This article serves as a comprehensive guide for administrators and educators involved in distributing and reviewing evaluations during student placements. Learn how to effectively distribute standard or custom evaluation forms to clinical sites and manage the recipient's list. Discover step-by-step instructions on sending notifications, customizing email templates, and scheduling distribution for evaluations. Additionally, explore how to review completed evaluations and manage their status within the learning activities dashboard. Whether you're coordinating evaluations for a specific course or rotation, this guide provides valuable insights to streamline the evaluation distribution, review process and evaluation reports

You can find the evaluation form by following these steps:

1. Select Learning Activities from the left menu or dashboard.
2. Select Forms/Evaluations for the desired course offering.
3. You can also find the course or rotation you'd like to review using the Learning Activity Groups by selecting your desired course or rotation.
4. You'll be taken to the Forms/Evaluations Summary page, which will display all activated forms and evaluations along with their current status. Click on the status to view the form.

- [Distributing Evaluations](#)
- [Redistributing Evaluations](#)
- [Auto Distribution of Evaluation](#)
- [Reviewing Evaluations](#)
- [Completing Evaluations](#)
- [Reports](#)
 - [Graphical Report for Evaluation forms](#)
 - [Viewing Aggregate Reports For Scored Evaluations](#)

Distributing Evaluations

During a placement, if you use standard or custom forms that need to be completed by clinical sites, you can distribute them when needed!

1. Go to Dashboard and click Learning Activities.

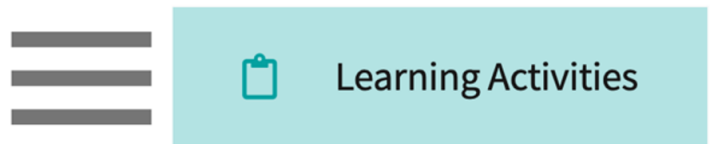


Learning Activities

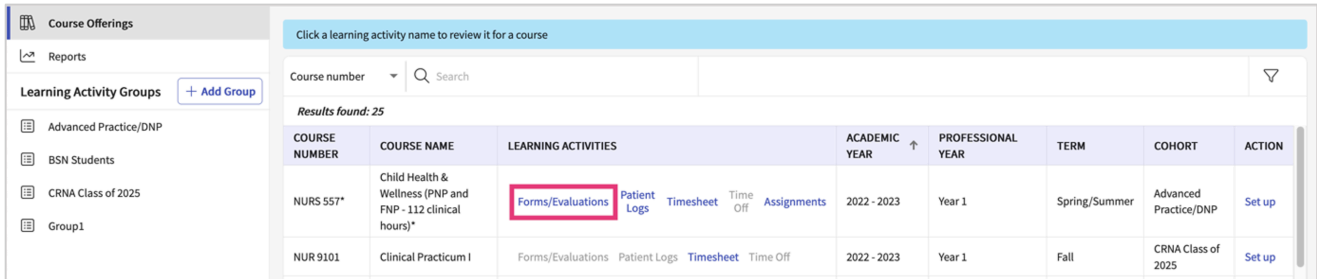
Set up, distribute, review and grade course related activities.

OR

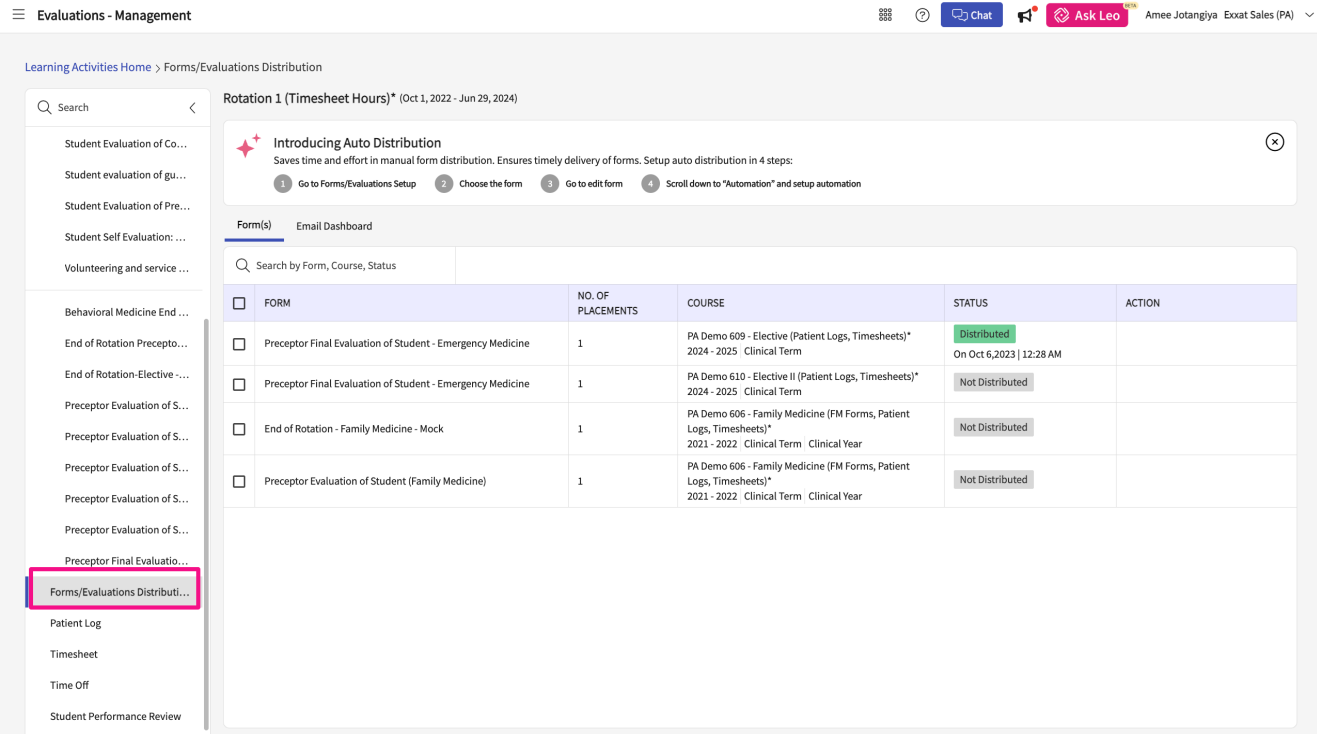
2. Go to menu on the top left corner and click Learning Activities.



3. Find and select the course you'd like to distribute evaluations for. Select Forms/Evaluations from the Learning Activities column.



4. Click on Forms/Evaluations Distribution from the left panel.



5. Select the forms you want to distribute, redistribute, or schedule for a future date.

1. If you select one form to distribute, then click Distribute under the Action column for the required form.

Evaluations - Management

Learning Activities Home > Forms/Evaluations Distribution

Mock Rotation - 1 (Jul 19, 2022 - Sep 17, 2026)

Forms(s) Email Dashboard

Search by Form, Course, Status

FORM	NO. OF PLACEMENTS	COURSE	STATUS	ACTION
<input checked="" type="checkbox"/> Competency Tracking - Quantitative	1	101 - Demo Course 2024 - 2025 Winter Year 1	Not Distributed	Distribute
<input type="checkbox"/> Competency tracking (NONPF-preceptor evaluation of student-final) - Quantitative	1	101 - Demo Course 2024 - 2025 Winter Year 1	Distributed On Aug 1, 2024 6:19 PM	Redistribute View History
<input type="checkbox"/> Competency tracking (NONPF-preceptor evaluation of student-mid) - Quantitative	1	101 - Demo Course 2024 - 2025 Winter Year 1	Distributed On May 3, 2024 10:10 AM	Redistribute View History

Forms/Evaluations Summary

- CNS Clinical Activities Log
- Faculty Evaluation of Clinic...
- FNP Clinical Evaluation Tool
- Nurse Educator Evaluation ...
- PhD Student Annual Review
- Skills Checklist
- Student Evaluation of Cour...
- Student Self Evaluation: Pr...
- Volunteering and service le...
- Competency Tracking - Qu...
- Competency tracking (NO...
- Competency tracking (NO...
- Forms/Evaluations Distribution**
- Patient Log
- Timesheet
- Student Performance Review

2. If you want to distribute multiple forms, then select the checkboxes for the required forms and click **Distribute** above the forms table.

Evaluations - Management

Learning Activities Home > Forms/Evaluations Distribution

Mock Rotation - 1 (Jul 19, 2022 - Sep 17, 2026)

Forms(s) Email Dashboard

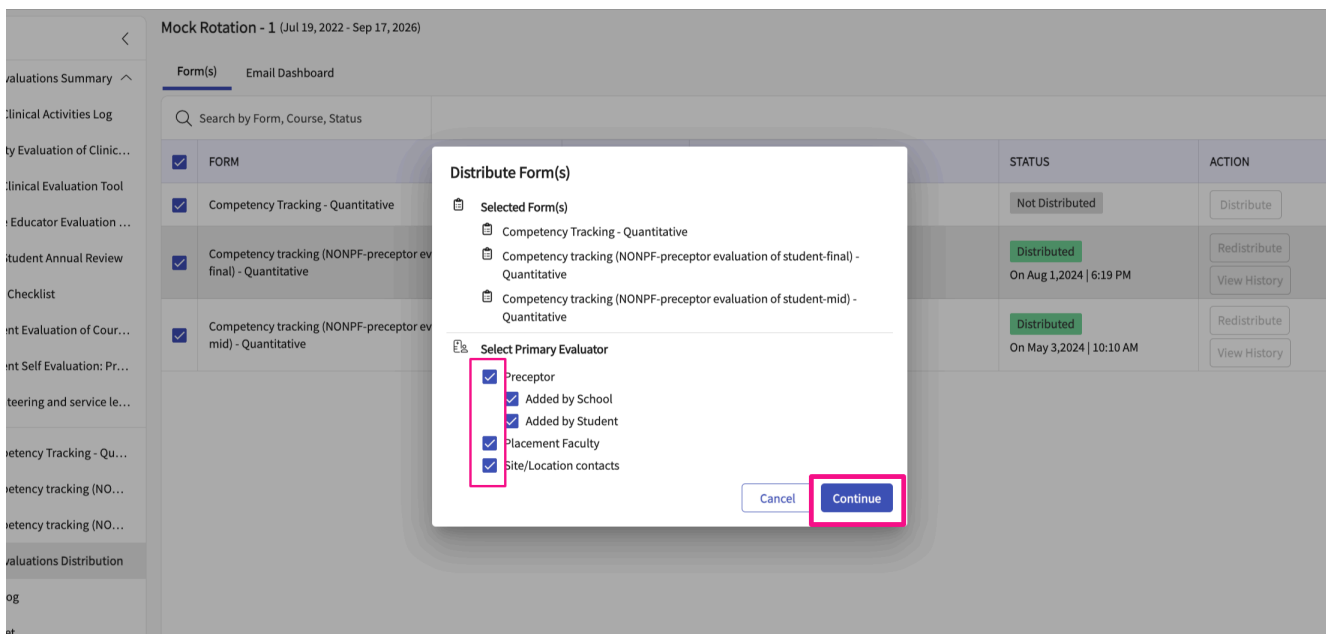
Search by Form, Course, Status

FORM	NO. OF PLACEMENTS	COURSE	STATUS	ACTION
<input checked="" type="checkbox"/> Competency Tracking - Quantitative	1	101 - Demo Course 2024 - 2025 Winter Year 1	Not Distributed	Distribute
<input checked="" type="checkbox"/> Competency tracking (NONPF-preceptor evaluation of student-final) - Quantitative	1	101 - Demo Course 2024 - 2025 Winter Year 1	Distributed On Aug 1, 2024 6:19 PM	Redistribute View History
<input checked="" type="checkbox"/> Competency tracking (NONPF-preceptor evaluation of student-mid) - Quantitative	1	101 - Demo Course 2024 - 2025 Winter Year 1	Distributed On May 3, 2024 10:10 AM	Redistribute View History

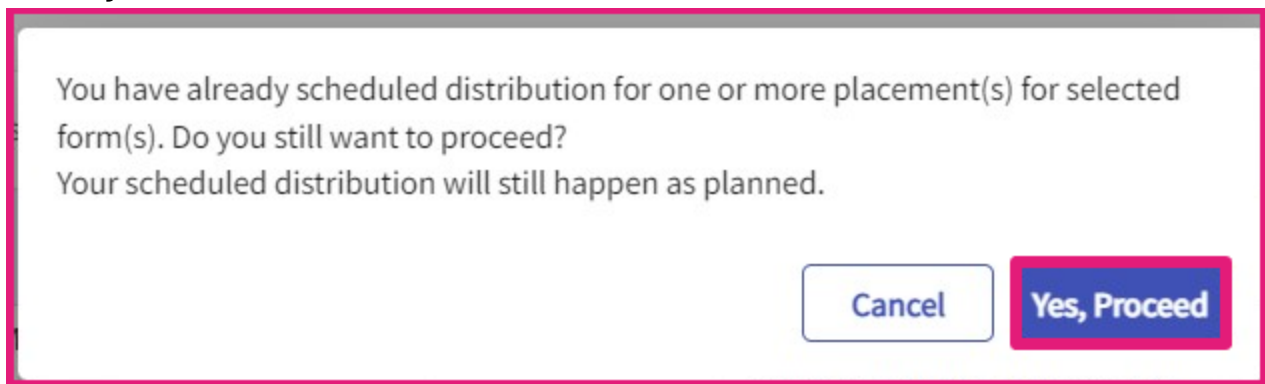
Forms/Evaluations Summary


- CNS Clinical Activities Log
- Faculty Evaluation of Clinic...
- FNP Clinical Evaluation Tool
- Nurse Educator Evaluation ...
- PhD Student Annual Review
- Skills Checklist
- Student Evaluation of Cour...
- Student Self Evaluation: Pr...
- Volunteering and service le...
- Competency Tracking - Qu...
- Competency tracking (NO...
- Competency tracking (NO...
- Forms/Evaluations Distribution**
- Patient Log
- Timesheet
- Student Performance Review

6. On the Distribute Form(s) window, you can view the selected form name. In the Select Primary Evaluator section, select the evaluator you want to send the forms to and click Continue.



7. If the distribution is already scheduled, you can still continue to create another schedule for the same form. Click **Distribute**, and click **Yes, Proceed** to create multiple schedules. Select the **Primary Evaluator > Continue**.



8. Select the recipient to whom you want to send the forms. Click filter icon  to filter the evaluator list.

Evaluations - Management
 Chat
Ask Leo
Amee Jotangiya Exxat Sales (Nursing)

← Distribute Form(s)
 Mock Rotation - 1 (Jul 19, 2022 - Sep 17, 2026)

Selected Form(s)
 Competency Tracking - Quantitative
 Competency tracking (NONPF-precceptor evaluation of student-final) - Quantitative
 Competency tracking (NONPF-precceptor evaluation of student-mid) - Quantitative

Choose for whom you wish to send the forms
 Compose Email

Search

STUDENTS	FORM	COURSE	PLACEMENT DETAILS	PRECEPTOR	PLACEMENT FACULTY	SITE/LOCATION CONTACTS
<input checked="" type="checkbox"/> Student 05, Mock mockstudent503@example.com	Competency Tracking - Quantitative	101 - Demo Course 2024 - 2025 Winter	Test Site Med Surg	<input checked="" type="checkbox"/> Prec, Mock A akshika.panicker@exxat.com Added by student	N/A	N/A
<input checked="" type="checkbox"/> Student 05, Mock mockstudent503@example.com	Competency tracking (NONPF-precceptor evaluation of student-final) - Quantitative	101 - Demo Course 2024 - 2025 Winter	Test Site Med Surg	<input checked="" type="checkbox"/> Prec, Mock A akshika.panicker@exxat.com Added by student	N/A	N/A
<input checked="" type="checkbox"/> Student 05, Mock mockstudent503@example.com	Competency tracking (NONPF-precceptor evaluation of student-mid) - Quantitative	101 - Demo Course 2024 - 2025 Winter	Test Site Med Surg	<input checked="" type="checkbox"/> Prec, Mock A akshika.panicker@exxat.com Added by student	N/A	N/A

9. Click Compose Email.

1. In the Create Notifications screen, in the Recipients tab, specify the following:

Evaluations - Management
 Chat
Ask Leo
Amee Jotangiya Exxat Sales (Nursing)

← Distribute Form(s)
 Mock Rotation - 1 (Jul 19, 2022 - Sep 17, 2026)

Selected Form(s)
 Competency Tracking - Quantitative
 Competency tracking (NONPF-precceptor evaluation of student-final) - Quantitative
 Competency tracking (NONPF-precceptor evaluation of student-mid) - Quantitative

Choose for whom you wish to send the forms
 Compose Email

Search

Create Notification
 1 Recipients 2 Template 3 Preview

Copy selected recipient email addresses

Recipients 3 selected recipients

☒ Prec, Mock A (akshika.panicker@exxat.com)
☒ Prec, Mock A (akshika.panicker@exxat.com)
☒ Prec, Mock A (akshika.panicker@exxat.com)

If override is specified, ALL email notifications will be sent to THIS email instead of the original recipients.
 Override Recipient's Email

Reply to *
 amee.j@exxat.com

CC

BCC

You have 10.00 MB remaining for attachments in Recipients Tab

Upload files
 Browse to upload

Supported formats:
 pdf, doc, jpg, jpeg, png, heic, docx, xls, pptx, potm, potx, ppt, rtf, xls, docm, bmp, csv, gif, tiff, mp4
 You can only upload files with file size under 10 MB.
 We recommend switching to PDF format if you encounter issues viewing the uploaded file in other formats.

1. Select the checkboxes for the required recipients.
2. In the Override Recipient's Email text box, add the email address. Click Copy selected recipient email addresses and past the selected recipient in the override text box.
Note: If override is specified, all the email notifications will be sent to the specified email address instead of the original recipients
3. Specify the CC (carbon copy) and BCC (blind carbon copy) email addresses, if required.
4. Click Browse the upload to attach any relevant files.

5. Click Next.

10. In the Template section, you can perform the following:

The screenshot shows the 'Create Notification' interface. On the left is a sidebar titled 'Evaluations - Management' with a 'Distribute Form(s)' section for 'Mock Rotation - 1 (Jul 19, 2022 - Sep 17, 2026)'. It lists 'Selected Form(s)' and a table for choosing recipients. The main area is titled 'Create Notification' and has three steps: '1 Recipients', '2 Template', and '3 Preview'. The 'Template' step is active. It features a 'Pick a template' dropdown menu with 'Standard' selected. Below it is an '+ Add Template' button. The 'Subject' text box contains '@First name @Last Name Evaluation - @Form name'. The 'Merge Fields' list on the right includes '@First name', '@Last Name', '@Form name', '@Preceptor first name', '@Preceptor last name', '@Delegate Link', '@Prefix', and '@title'. A 'Preview' button is highlighted with a red box. The email content area shows a draft with an Exxat logo, a university logo, and a body of text including a greeting, a thank you, a link to submit an evaluation, and a footer with the Exxat logo.

1. From the Pick a template drop-down menu, select the required template. The selected template is displayed.
2. Click Preview to view the email before sending it.
3. In the Template name text box, specify the name.
 1. In the Subject text box, specify the subject for the email.
 2. In the text box, specify the content of the email.
3. You can select the
 1. Header and footer layout from the following
 2. Exxat logo on the footer
 3. University logo on the header
 4. No logos on the header and footer
 5. University logo on the header and Exxat logo on the footer
4. Share Profile University logo on the header and Exxat logo on the footer.
5. In the Upload Files in this Template section, click Browse to upload to upload files in the template.
6. Click Save. The new template will be displayed in the Pick a Template drop-down menu.

2. On the Preview section, you can review your email and select one of the following:

The screenshot shows the 'Create Notification' interface. On the left, there's a sidebar with 'Evaluations - Management' and a table of evaluations. The main area shows a preview of an email template with the Exxat logo and placeholder text for recipient details and evaluation information. On the right, there are two radio button options: 'Send email now' (selected) and 'Send email at specific date and time'. Below these are sections for 'Attachments from Template' and 'Attachments from Recipient Tab', both showing 'No Attachments'. At the bottom right, there are 'Previous' and 'Send' buttons.

1. **Send email now** – if you select this option,
2. **Send email at specific date and time** – from the **Date Time** calendar select the date, month, year, and time to schedule the email.
3. Click **Send**.

Redistributing Evaluations

1. Go to Dashboard and click Learning Activities.



Learning Activities

Set up, distribute, review and grade course related activities.

OR

2. Go to menu on the top left corner and click Learning Activities.



Learning Activities

3. Find and select the course you'd like to distribute evaluations for. Select Forms/Evaluations from the Learning Activities column.

101 - Demo Course, 2024 - 2025 Winter Class of 2024 Year 1

Learning Activities Home > Forms/Evaluations Distribution

Search

Forms/Evaluations Summary

CNS Clinical Activities Log

Faculty Evaluation of Clinic...

FNP Clinical Evaluation Tool

Nurse Educator Evaluation ...

PhD Student Annual Review

Skills Checklist

Student Evaluation of Cour...

Student Self Evaluation: Pr...

Volunteering and service le...

Competency Tracking - Qu...

Competency tracking (NO...

Competency tracking (NO...

Forms/Evaluations Distribution

Course Based Forms Summary

Competency Tracking - Qu...

Competency tracking (UM...

Patient Log

Timesheet

Introducing Auto Distribution

Saves time and effort in manual form distribution. Ensures timely delivery of forms. Setup auto distribution in 4 steps:

- 1 Go to Forms/Evaluations Setup
- 2 Choose the form
- 3 Go to edit form
- 4 Scroll down to "Automation" and setup automation

Form(s) Email Dashboard

Search by Form, Rotation, Status

FORM	NO. OF PLACEMENTS	ROTATION	STATUS	ACTION
<input type="checkbox"/> Competency Tracking - Quantitative	1	Mock Rotation - 1 Jul 19, 2022 - Sep 17, 2026	Distributed On Aug 14, 2024 11:07 AM	Redistribute View History
<input type="checkbox"/> Competency tracking (NONPF-preceptor evaluation of student-final) - Quantitative Auto-Distribution ⓘ	1	Mock Rotation - 1 Jul 19, 2022 - Sep 17, 2026	Distributed On Sep 11, 2024 3:33 PM	Redistribute View History
<input type="checkbox"/> Competency tracking (NONPF-preceptor evaluation of student-mid) - Quantitative	1	Mock Rotation - 1 Jul 19, 2022 - Sep 17, 2026	Distributed On May 3, 2024 10:10 AM	Redistribute View History
<input type="checkbox"/> Competency Tracking - Quantitative	2	Mock Rotation-2 Nov 14, 2023 - Jan 21, 2025	Distributed On Apr 10, 2024 5:06 AM	Redistribute View History
<input type="checkbox"/> Competency tracking (NONPF-preceptor evaluation of student-final) - Quantitative Auto-Distribution ⓘ	2	Mock Rotation-2 Nov 14, 2023 - Jan 21, 2025	Distributed On Jul 9, 2024 9:40 AM	Redistribute View History
<input type="checkbox"/> Competency tracking (NONPF-preceptor evaluation of student-mid) - Quantitative	2	Mock Rotation-2 Nov 14, 2023 - Jan 21, 2025	Not Distributed	Distribute
<input type="checkbox"/> Competency Tracking - Quantitative	6	Mock Rotation-3 Oct 10, 2023 - Jan 15, 2025	Not Distributed	Distribute
<input type="checkbox"/> Competency tracking (NONPF-preceptor evaluation of student-final) - Quantitative				

6. On the Distribute Form(s) window, you can view the selected form name. In the Select Primary Evaluator section, select the evaluator you want to send the forms to and click Continue.

Mock Rotation - 1 (Jul 19, 2022 - Sep 17, 2026)

Form(s) Email Dashboard

Search by Form, Course, Status

FORM	STATUS	ACTION
<input checked="" type="checkbox"/> FORM	Not Distributed	Distribute
<input checked="" type="checkbox"/> Competency Tracking - Quantitative		
<input checked="" type="checkbox"/> Competency tracking (NONPF-preceptor evaluation of student-final) - Quantitative	Distributed On Aug 1, 2024 6:19 PM	Redistribute View History
<input checked="" type="checkbox"/> Competency tracking (NONPF-preceptor evaluation of student-mid) - Quantitative	Distributed On May 3, 2024 10:10 AM	Redistribute View History

Distribute Form(s)

Selected Form(s)

- Competency Tracking - Quantitative
- Competency tracking (NONPF-preceptor evaluation of student-final) - Quantitative
- Competency tracking (NONPF-preceptor evaluation of student-mid) - Quantitative

Select Primary Evaluator

- ☒ Preceptor
- ☒ Added by School
- ☒ Added by Student
- ☒ Placement Faculty
- ☒ Site/Location contacts

Cancel Continue


7. If the distribution is already scheduled, you can still continue to create another schedule for the same form. Click **Distribute**, and click **Yes, Proceed** to create multiple schedules. Select the

Primary Evaluator > Continue.

You have already scheduled distribution for one or more placement(s) for selected form(s). Do you still want to proceed?
Your scheduled distribution will still happen as planned.

Cancel

Yes, Proceed

8. Select the recipient to whom you want to send the forms. Click filter icon  to filter the evaluator list.

Evaluations - Management

← Distribute Form(s)

Mock Rotation - 1 (Jul 19, 2022 - Sep 17, 2026)

Selected Form(s)

Competency Tracking - Quantitative

Competency tracking (NONPF-preceptor evaluation of student-final) - Quantitative

Competency tracking (NONPF-preceptor evaluation of student-mid) - Quantitative

Choose for whom you wish to send the forms

Compose Email

Search

<input checked="" type="checkbox"/>	STUDENTS <div>Evaluate</div>	FORM	COURSE	PLACEMENT DETAILS	<input checked="" type="checkbox"/> PRECEPTOR <div>Evaluator</div>	<input type="checkbox"/> PLACEMENT FACULTY <div>Evaluator</div>	<input type="checkbox"/> SITE/LOCATION CONTACTS <div>Evaluator</div>
<input checked="" type="checkbox"/>	Student 05, Mock mockstudent503@example.com	Competency Tracking - Quantitative	101 - Demo Course 2024 - 2025 Winter	Test Site Med Surg	<input checked="" type="checkbox"/> Prec, Mock A akshika.panicker@exat.com Added by student	N/A	N/A
<input checked="" type="checkbox"/>	Student 05, Mock mockstudent503@example.com	Competency tracking (NONPF-preceptor evaluation of student-final) - Quantitative	101 - Demo Course 2024 - 2025 Winter	Test Site Med Surg	<input checked="" type="checkbox"/> Prec, Mock A akshika.panicker@exat.com Added by student	N/A	N/A
<input checked="" type="checkbox"/>	Student 05, Mock mockstudent503@example.com	Competency tracking (NONPF-preceptor evaluation of student-mid) - Quantitative	101 - Demo Course 2024 - 2025 Winter	Test Site Med Surg	<input checked="" type="checkbox"/> Prec, Mock A akshika.panicker@exat.com Added by student	N/A	N/A

9. Click Compose Email.

1. In the Create Notifications screen, in the Recipients tab, specify the following:

The screenshot shows the 'Create Notification' interface. On the left, a sidebar titled 'Evaluations - Management' displays a table of students and forms. The main area is titled 'Create Notification' and has three tabs: '1 Recipients', '2 Template', and '3 Preview'. The 'Recipients' tab is active, showing a list of 3 selected recipients. A 'Next' button is highlighted with a red box. Below the recipients list, there are fields for 'Override Recipient's Email', 'Reply to *', 'CC', and 'BCC'. A blue bar indicates 'You have 10.00 MB remaining for attachments in Recipients Tab'. At the bottom, there is an 'Upload files' section with a 'Browse to upload' button and a list of supported file formats.

STUDENTS	Evaluatee	FORM
<input checked="" type="checkbox"/>	Student 05, Mock mockstudent503@example.com	Competency Tracking- Quantitative
<input checked="" type="checkbox"/>	Student 05, Mock mockstudent503@example.com	Competency tracking (preceptor evaluation of student-final) - Quantitative
<input checked="" type="checkbox"/>	Student 05, Mock mockstudent503@example.com	Competency tracking (preceptor evaluation of student-mid) - Quantitative

Create Notification

1 Recipients 2 Template 3 Preview

Copy selected recipient email addresses

Recipients 3 selected recipients

- ☒ Prec, Mock A (akshika.panicker@exxat.com)
- ☒ Prec, Mock A (akshika.panicker@exxat.com)
- ☒ Prec, Mock A (akshika.panicker@exxat.com)

If override is specified, ALL email notifications will be sent to THIS email instead of the original recipients.

Override Recipient's Email

Reply to *

amee.j@exxat.com

CC

BCC

You have 10.00 MB remaining for attachments in Recipients Tab

Upload files

Browse to upload

Supported formats:
.pdf,.doc,.jpg,.jpeg,.png,.heic,.docx,.xlsx,.pptx,.potx,.potm,.ppt,.rtf,.xls,.docm,.bmp,.csv,.gif,.tiff,.mp4
You can only upload files with file size under 10 MB.
We recommend switching to PDF format if you encounter issues viewing the uploaded file in other formats.

1. Select the checkboxes for the required recipients.
2. In the Override Recipient's Email text box, add the email address. Click Copy selected recipient email addresses and past the selected recipient in the override text box.
Note: If override is specified, all the email notifications will be sent to the specified email address instead of the original recipients
3. Specify the CC (carbon copy) and BCC (blind carbon copy) email addresses, if required.
4. Click Browse the upload to attach any relevant files.
5. Click Next.

10. In the Template section, you can perform the following:

The screenshot displays the 'Create Notification' interface in the 'Template' step. The sidebar on the left shows 'Evaluations - Management' with options to 'Distribute Form(s)' and 'Selected Form(s)'. The main content area features a 'Pick a template' dropdown menu set to 'Standard'. A 'Preview' button is highlighted with a red box. The email template content is displayed, including a subject line, a header with a university logo, a body with personalized text and a link, and a footer with the Exxat logo.

1. From the Pick a template drop-down menu, select the required template. The selected template is displayed.
2. Click Preview to view the email before sending it.
3. In the Template name text box, specify the name.
 1. In the Subject text box, specify the subject for the email.
 2. In the text box, specify the content of the email.
3. You can select the
 1. Header and footer layout from the following
 2. Exxat logo on the footer
 3. University logo on the header
 4. No logos on the header and footer
 5. University logo on the header and Exxat logo on the footer
4. Share Profile University logo on the header and Exxat logo on the footer.
5. In the Upload Files in this Template section, click Browse to upload to upload files in the template.
6. Click Save. The new template will be displayed in the Pick a Template drop-down menu.
7. On the Preview section, you can review your email and select one of the following:

Evaluations - Management

← Distribute Form(s)
Mock Rotation - 1 (Jul 19, 2022 - Sep 17, 2026)

Selected Form(s)
Competency tracking (NONPF-preceptor evaluation of student final) - Q...

Choose for whom you wish to send the forms

Search

STUDENTS	Evaluee	FORM
<input checked="" type="checkbox"/>	Student 05, Mock mockstudent503@example.com	Competency tracki
<input checked="" type="checkbox"/>	Student 05, Mock mockstudent503@example.com	Competency tracki

Create Notification

Recipients Template **3 Preview**

Send email now
Send email at specific date and time

Attachments from Template
No Attachments

Attachments from Recipient Tab
No Attachments

Dear [@@prefix@] [@@preceptorFirstName@] [@@preceptorLastName@],

Thank you for the time that you have devoted to our student. Your expertise and commitment are invaluable and greatly appreciated.

Please submit the [@@evalFormName@] evaluation of [@@targetFirstName@] [@@targetLastName@] by clicking [here](#).

If clicking the link does not work, copy and paste the URL in a new browser window.

[@@link@]

Once the evaluation completed, please click the 'Submit' icon at the top of the evaluation.

If you have received this letter and are not the student's evaluator, please reply to this email immediately so that the student's evaluation is sent to the correct personnel.

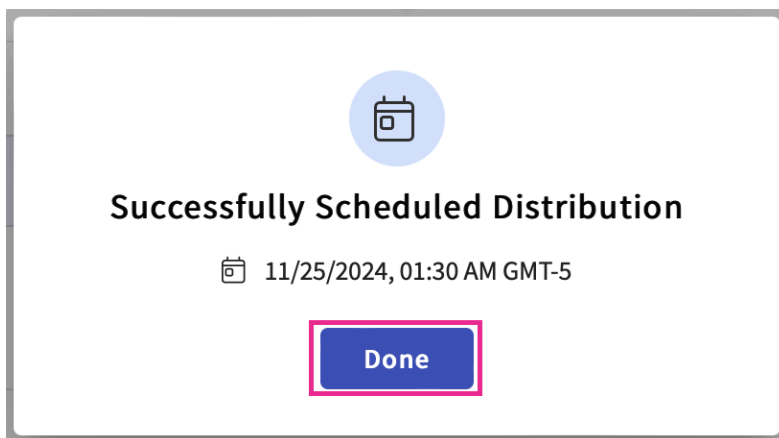
Please do not hesitate to contact the program with any questions or additional feedback.

Thank you.

Best Regards,

Exxat

1. **Send email now** – if you select this option,
2. **Send email at specific date and time** – from the **Date Time** calendar select the date, month, year, and time to schedule the email.
3. Click **Send**.
4. Once you have scheduled the email, you would see a pop up window with the details of the scheduled email, click on done.



11. Once the Distribution is scheduled you would see the status updated to "Scheduled" along with the date and time of when the distribution is scheduled.

Rotation 4* (09/01/2024 - 10/03/2024)


Introducing Auto Distribution
 Saves time and effort in manual form distribution. Ensures timely delivery of forms. Setup auto distribution in 4 steps:

- Go to Forms/Evaluations Setup
- Choose the form
- Go to edit form
- Scroll down to "Automation" and setup automation

Form(s) Email Dashboard Distribute

❑	FORM	NO. OF PLACEMENTS	COURSE	STATUS	ACTION
❑	End of Rotation - Family Medicine - Mock	1	PA Demo 606 - Family Medicine (FM Forms, Patient Logs, Timesheets)* 2021 - 2022 Clinical Term Clinical Year	Scheduled <small>For 11/25/2024, 01:30 AM GMT-5</small>	Distribute View History Cancel Schedule
❑	Preceptor Evaluation of Student (Family Medicine)	1	PA Demo 606 - Family Medicine (FM Forms, Patient Logs, Timesheets)* 2021 - 2022 Clinical Term Clinical Year	Distributed <small>On 11/11/2024, 04:55 AM GMT-5</small>	Redistribute View History
❑	Behavioral Medicine End of Rotation Evaluation of Student	1	PA Demo 603 - Master Class (All Forms, Patient Logs, Timesheets)* 2021 - 2022 Clinical Term Clinical Year	Not Distributed	Distribute

Rotation 4* (09/01/2024 - 10/03/2024)



Introducing Auto Distribution

Saves time and effort in manual form distribution. Ensures timely delivery of forms. Setup auto distribution in 4 steps:

- Go to Forms/Evaluations Setup
- Choose the form
- Go to edit form
- Scroll down to "Automation" and setup automation

Form(s) Email Dashboard Distribute

	Search by Form, Course, Status
<input type="checkbox"/>	FORM
<input type="checkbox"/>	NO. OF PLACEMENTS
<input type="checkbox"/>	COURSE
<input type="checkbox"/>	STATUS
<input type="checkbox"/>	ACTION
<input type="checkbox"/>	End of Rotation - Family Medicine - Mock
<input type="checkbox"/>	Preceptor Evaluation of Student (Family Medicine)


You can use the auto distribution feature to automatically send notifications to users or stakeholders based on set rules. This makes communication smoother by ensuring important updates are shared

quickly and by cutting down on manual work. You can define specific conditions or events that will trigger the distribution of content.

Setting up Auto Distributions

To set up Auto Distributions, perform the following steps:


- 1. Go to Dashboard and click Learning Activities.


 **Learning Activities**


Set up, distribute, review and grade course related activities.


OR


Go to the menu on the top left corner and click Learning Activities.


 Dashboard


 Program Details


 Students


 Faculty and Staff


 Student Compliance


 Courses

 Curriculum Mapping

 Sites

 Process My Requests

 Placements

 Learning Activities

- 2. Click Setup under the Actions column for the required course.

Learning Activity

Course Offerings

Reports

Learning Activity Groups + Add Group

Class of 2025*

Forms and Evaluations Reports*

Gradebook Setup*

Patient Log Reports*

Patient Logs* (All Rotations F...

Timesheet and Time Off Reports...

Click a learning activity name to review it for a course

Course number

Search

Results found: 84

COURSE NUMBER	COURSE NAME	LEARNING ACTIVITIES	ACADEMIC YEAR	TERM	COHORT	PROFESSIONAL YEAR	SECTIONS	ACTION
101	Mock Course	Forms/Evaluations Patient Log Timesheet Time Off	2024 - 2025	Clinical Term	Class of 2025*	Clinical Year	-	Set up Reports
101	Mock Course	Forms/Evaluations Patient Log Timesheet Time Off	2023 - 2024	Clinical Term	Class of 2026	Clinical Year	101	Set up Reports
801	Emergency Medicine	Forms/Evaluations Patient Log Timesheet Time Off	2023 - 2024	Didactic - Spring	Class of 2025*	Clinical Year	101	Set up Reports
999	4th Year My Request	Forms/Evaluations Patient Log Timesheet Time Off	2022 - 2023	Clinical Term	Class of 2022	Clinical Year	-	Set up Reports
PA 111	Gradebook course	Forms/Evaluations Patient Log Timesheet Time Off	2020 - 2021	Clinical Term	Class of 2021	Clinical Year	-	Set up Reports
PA 111	Gradebook course	Forms/Evaluations Patient Log Timesheet Time Off	2021 - 2022	Clinical Term	Class of 2022*	Clinical Year	-	Set up Reports
PA 111	Gradebook course	Forms/Evaluations Patient Log Timesheet Time Off	2022 - 2023	Clinical Term	Class of 2023	Clinical Year	-	Set up Reports
PA 111	Gradebook course	Forms/Evaluations Patient Log Timesheet Time Off	2023 - 2024	Clinical Term	Class of 2024	Clinical Year	-	Set up Reports
PA 601	Family Medicine Rotation	Forms/Evaluations Patient Log Timesheet Time Off	2020 - 2021	Clinical Term	Class of 2021	Clinical Year	-	Set up Reports

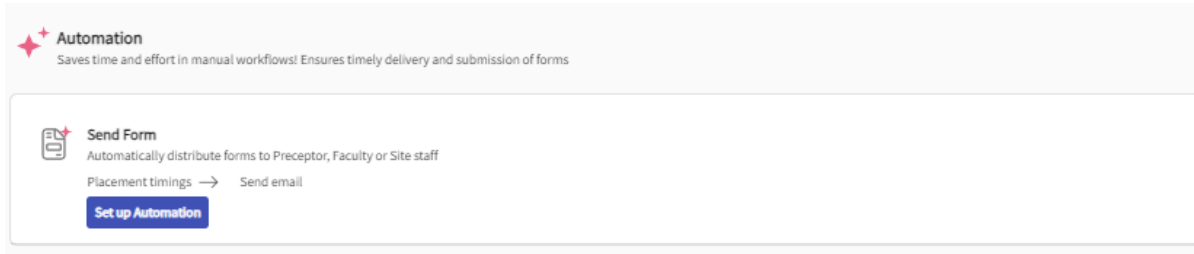
- 3. Click the add icon for the required course under the Actions column.

4. In the Select Form tab, select the form you want to create auto notification for.

5. In the Configuration Form, specify the following details and click Save:

1. Grading: Select Yes or No as required.
1. Does this form contribute to the student's final score?
2. Does this form require low score indicator?
2. Publish Date for the Form: Sets the number of days before or after a specified anchor date when the form must be published.

3. What faculty role should be able to view the form and make changes?: Specifies the faculty role that has permission to view and edit the form.
4. What faculty role should be able to only view the form?: Specifies the faculty role that can only view the form without editing permissions.
5. File Upload: Upload the required template.
6. Click Set up Automation.



7. Specify the following information:
 1. When do you want to distribute forms?: Choose the timing for when the forms must be distributed for the placement period. Select Trigger: Choose the trigger point for form distribution.
 1. Beginning of Placement: Distribute forms at the start of the placement period.
 2. Mid of Placement: Distribute forms halfway through the placement period.
 3. End of Placement: Distribute forms at the end of the placement period.
 2. Do you have a preferred distribution schedule?: Specify if you have a particular schedule for distributing the forms relative to the placement period.
 3. Click Add Now and specify the number of days and select Before or After from the drop-down for End of Placement.

Note: Click the Delete icon to delete the preferred distribution schedule.
 3. Who should get this email?: Select the required recipients for the email notification.
 4. Which email template do you wish to send?: Choose the email template that will be used for sending notifications. Click Preview Template to view and select the email template you wish to use.
 8. Switch the Active toggle to On to enable the notifications per configuration. To disable auto notification, switch the toggle to Off. The selected recipients will stop receiving the notification.
 9. Click Save. A message confirming the activation is displayed and Auto Distribution label is added for the form.
10. Once the setup is complete, the school can make changes to the configuration as needed by clicking on the pencil icon.

Automation

Saves time and effort in manual workflows! Ensures timely delivery and submission of forms

Auto Distribute form 7 days before end of placement

Automatically distribute forms to Preceptor, Faculty or Site staff

7 days Before → End of Placement → Send email

All Preceptor by school and Preceptor by student

Standard

11. If a school wishes to delete the auto-distribution setup, they need to click on the trash icon.

Automation

Saves time and effort in manual workflows! Ensures timely delivery and submission of forms

Auto Distribute form 7 days before end of placement

Automatically distribute forms to Preceptor, Faculty or Site staff

7 days Before → End of Placement → Send email

All Preceptor by school and Preceptor by student

Standard

12. Once you click on the trash icon, a popup will appear to confirm the removal of auto-distribution for the form. Click on "Delete Automation" in the popup to proceed.

Are you certain you want to delete the automation?

If you proceed, you will be responsible for manually distributing all the forms

Not now

Delete Automation

13. Once the Automation setup is completed you will be able to view the schedule distribution under Forms/Evaluation.

Forms/Evaluations 0.00% Weightage Status: Activated +

FORM (1)	ADDITIONAL DETAILS	WEIGHTAGE (%)	PUBLISH DATE	MIDTERM DUE	FINAL DUE DATE	STATUS	ACTIONS
Preceptor Agreement Letter Form Auto Distributed 7 days before placement end date	Preceptor Admin Preceptor fills t... No Auto distrib...	N/A	N/A	N/A	1 Days (After the Placement End Date)	Active	

See Less

Reviewing Evaluations

Once your students complete any forms or evaluations, you'll be able to review the results!

1. Select Learning Activities from the left menu or dashboard.



2. Select Forms/Evaluations for the desired course offering.

Course Offerings

Reports

Learning Activity Groups [+ Add Group](#)

- Class of 2021
- Class of 2022*
- Class of 2023
- Class of 2024

Click a learning activity name to review it for a course

Course number Search Filters: Class of 2025...

Results found: 5

COURSE NUMBER	COURSE NAME	LEARNING ACTIVITIES	ACADEMIC YEAR	PROFESSIONAL YEAR	TERM	COHORT	ACTION
DPT 800	Clinical Practice I*	Forms/Evaluations Patient Logs Timesheet Time Off	2025 - 2026	1st Year	Fall	Class of 2025	Set up Reports
DPT 822	Cardiac Pathology, Diagnosis and Management*	Forms/Evaluations Patient Logs Timesheet Time Off	2023 - 2024	2nd Year	Spring	Class of 2025	Set up Reports

3. You can also find the course or rotation you'd like to review using the Learning Activity Groups, simply select your desired course or rotation.

Course Offerings

Reports

Learning Activity Groups [+ Add Group](#)

- Class of 2021
- Class of 2022***
- Class of 2023
- Class of 2024
- Class of 2025
- Class of 2025

Class Of 2022*

Description: LAM Group for cohort Class of 2022*

Courses Rotations Reports

Click a learning activity name to review it for a course

Course number Search

Results found: 10

COURSE NUMBER	COURSE NAME	LEARNING ACTIVITIES	ACADEMIC YEAR	PROFESSIONAL YEAR	TERM	COHORT	ACTION
PA 601	Family Medicine Rotation	Forms/Evaluations Patient Logs Timesheet Time Off	2021 - 2022	Clinical Year	Clinical Year	Class of 2022*	Set up Reports
PA 602	Emergency Medicine Rotation	Forms/Evaluations Patient Logs Timesheet Time Off	2021 - 2022	Clinical Year	Clinical Year	Class of 2022*	Set up Reports

4. You'll be taken to the Forms/Evaluations Summary page, which will display all activated forms and evaluations along with their current status. Click on the status to view the form.

Learning Activities Home > Dashboard > Forms/Evaluations Summary

Forms/Evaluations Summary

CI Details

CIET

PT Student Evaluation o...

PT Student Evaluation o...

Forms/Evaluations Distribution

Timesheet

Time Off

Assignments

DPT 800 - Clinical Practice I*, 2019 - 2020 Fall Class of 2022* 1st Year

Clinical Practice I (11/05/2019 - 12/03/2019)

Enter student name to search

Results found: 5

STUDENT (5)	CI DETAILS	CIET	PT STUDENT EVALUATION OF CLINICAL INSTRUCTION	PT STUDENT EVALUATION OF SITE
Deitra, Kay* Crestview Orthopedics Outpatient	Pending School Review	Final - In Progress by Student	Reviewed	Reviewed
Elton, Megan Community Ambulatory Care Acute Care	Pending School Review	Midterm - Get Started	Pending School Review	Reviewed
Jaylee, Valerie Abundant Health* School Based	Get Started	Midterm - Get Started	Get Started	Get Started

5. A drawer will open for you to review the form/evaluation. If you make any changes, make sure to click Update.

1. If the form has a status of **Pending School Review**: you can mark the form as reviewed, or un-submit the form for the student or site to make further edits.

2. If the form has a status of **In Progress by Student/Site**: you can clear the form, save any changes, or submit on their behalf.

Review

ME Elton, Megan
Community General | Clinical Practice I |
Due Date : 11/12/2019
Acute Care

Pending School Review

CI Details Form

Select an option
Reviewed

Comment
0/10000

Audit Log Update

Select Clinical Instructors *
Ronnie Perez (ronnie.perez@example.com)

Ronnie Perez's General Information and Signature

6. If you would like to focus on reviewing a specific form/evaluation, select the form from the left panel.

Learning Activities Home > Dashboard > Forms/Evaluations Summary

Forms/Evaluations Summary

CI Details
CIET
PT Student Evaluation o...
PT Student Evaluation o...

Forms/Evaluations Distribution
Timesheet
Time Off
Assignments

DPT 800 - Clinical Practice I*, 2019 - 2020 | Fall | Class of 2022* | 1st Year
Clinical Practice I (11/05/2019 - 12/03/2019)

Enter student name to search

Results found: 5

STUDENT (5)	CI DETAILS	CIET	PT STUDENT EVALUATION OF CLINICAL INSTRUCTION	PT STUDENT EVALUATION OF SITE
Deitra, Kay* Crestview Orthopedics Outpatient	Pending School Review	Final - In Progress by Student	Reviewed	Reviewed
Elton, Megan Community Ambulatory Care Acute Care	Pending School Review	Midterm - Get Started	Pending School Review	Reviewed
Jaylee, Valerie Abundant Health* School Based	Get Started	Midterm - Get Started	Get Started	Get Started

7. The page will load all the students along with the status of the form.

1. Click Review All to mark all forms as reviewed.

2. If your form has a feature enabled to display completed forms on the location profile, click Publish All. You can also publish forms individually.

DPT 800 - Clinical Practice I*, 2019 - 2020 | Fall | Class of 2022* | 1st Year
Clinical Practice I (11/05/2019 - 12/03/2019)

PT Student Evaluation of Site

Enter student name to search

Publish All Review All

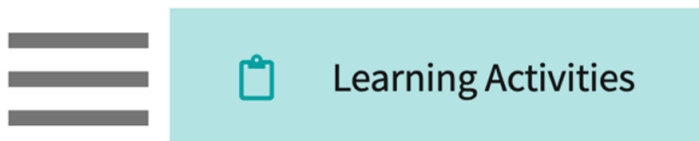
Results found: 5

STUDENT (5)	STATUS	SCORE	DUE DATE	SUBMISSION DATE	AUDIT LOG
Deitra, Kay* Crestview Orthopedics Outpatient	Reviewed	-	02/26/2022	08/18/2021	View Log
Elton, Megan Community Ambulatory Care Acute Care	Reviewed	-	11/30/2019	08/19/2021	View Log
Jaylee, Valerie Abundant Health* School Based	Get Started	-	11/30/2019	-	View Log
Masterson, Jacqueline Allsports - Warren Acute Care	Pending School Review	4	11/30/2019	08/24/2021	View Log

Completing Evaluation

During a placement, if you use standard or custom forms that you want to fill can be completed under review section.

1. Select Learning Activities from the left menu or dashboard.



2. Find and select the course for which you'd like to fill the evaluations for. Select Forms/Evaluations from the Learning Activities column.

Course Offerings

Reports

Learning Activity Groups + Add Group

Advanced Practice/DNP

BSN Students

CRNA Class of 2025

Group1

Click a learning activity name to review it for a course

Course number Search

Results found: 25

COURSE NUMBER	COURSE NAME	LEARNING ACTIVITIES	ACADEMIC YEAR	PROFESSIONAL YEAR	TERM	COHORT	ACTION
NURS 557*	Child Health & Wellness (PNP and FNP - 112 clinical hours)*	Forms/Evaluations Patient Logs Timesheet Time Off Assignments	2022 - 2023	Year 1	Spring/Summer	Advanced Practice/DNP	Set up
NUR 9101	Clinical Practicum I	Forms/Evaluations Patient Logs Timesheet Time Off	2022 - 2023	Year 1	Fall	CRNA Class of 2025	Set up

3. You can also find the course or rotation you'd like to review using the Learning Activity Groups, simply select your desired course or rotation.

Course Offerings

Reports

Learning Activity Groups [+ Add Group](#)

- Class of 2021
- Class of 2022***
- Class of 2023
- Class of 2024
- Class of 2025
- Class of 2025

Class Of 2022*

Description: LAM Group for cohort Class of 2022*

Courses Rotations Reports

Click a learning activity name to review it for a course

Course number Search

Results found: 10

COURSE NUMBER	COURSE NAME	LEARNING ACTIVITIES	ACADEMIC YEAR	PROFESSIONAL YEAR	TERM	COHORT	ACTION
PA 601	Family Medicine Rotation	Forms/Evaluations Patient Logs Timesheet Time Off	2021 - 2022	Clinical Year	Clinical Year	Class of 2022*	Set up Reports
PA 602	Emergency Medicine Rotation	Forms/Evaluations Patient Logs Timesheet Time Off	2021 - 2022	Clinical Year	Clinical Year	Class of 2022*	Set up Reports

4. You'll be taken to the Forms/Evaluations Summary page, which will display all activated forms and evaluations along with their current status.

Forms/Evaluations Summary

Search

Forms/Evaluations Summary

- KASA Form
- Student Achievement Data
- Student Evaluation of Clinical...
- Student feedback on super...
- Student Performance Eval...
- Student Performance Eval...
- Supervisor Feedback Form
- Forms/Evaluations Distribution
- Clinical Log

SLP 520 - Clinical Externship SLP: Level 1, 2022 - 2023 | Fall | Class of 2022

Enter student name to search

Clinical Externship I (08/01/2022 - 12/31/2025)

PLACEMENT (4)	PLACEMENT FACULTY	VALUATION OF PLACEMENT	STUDENT FEEDBACK ON SUPERVISOR	STUDENT PERFORMANCE EVALUATION - FINAL	STUDENT PERFORMANCE MIDTERM
Cox, Jose Advent Professionals - Kingston County In-Patient	Barnett, June	d	Get Started	Get Started	Get Started
Rivera, Kelly Advantes Speech Clinic, Bilingual	Barnett, June		Pending School Review	Amanda Lu - Reviewed	Amanda Lu - Review
Sanders, Sarah Belmont Internal Medicine - River County Community Initiatives	Alvarez, Kim Bowman, Rachel		Reviewed	Nicole Hopkins - In Progress by Instructor Brent Lynch - Get Started	Nicole Hopkins - Progress Brent Lynch - Get Started

5. Click on the form status to start filling the form.

Evaluations ☒ Review

Learning Activities

Course Based

KASA Form

Brown, Janet
janet.brownslp@example.com
Due Date: 01/31/2024

KASA Form

CSD 7000 - Capstone Project (3)*
☐ Met ☒ In Progress ☐ In Remediation

CSD 6600 - Research Methods and Clinical Assessment of Literature (3)*
☒ Met ☐ In Progress ☐ In Remediation

CSD 6510 - Speech-Language for Hearing Impaired (1)*
☒ Met ☐ In Progress ☐ In Remediation

CSD 6430 - Cognitive and Higher Language Disorders (5)*
☒ Met ☐ In Progress ☐ In Remediation

CSD 6420 - Aphasia Rehabilitation (4)*
☒ Met ☐ In Progress ☐ In Remediation

CSD 6400 - Child Language Development and Usage (4)*
☒ Met ☐ In Progress ☐ In Remediation

CSD 6310 - Geriatric Dysphagia and Airway Management (2)*
☐ Met ☒ In Progress ☐ In Remediation

CSD 6300 - Pediatric Swallow and Airway Management (1)*
☐ Met ☒ In Progress ☐ In Remediation

Select an option

Comment

0/10000

[Audit Log](#) [Update](#)

[Preview](#) [Get Started](#)

6. For PTMACS forms, **click to view response summary** that is displayed on the top right corner of the middle pane to view the response summary in detail.

Review

Preview

ER

Eval Student, R25 | r25eval@exxat.com

Eval June 2022-rpts | Rotation April 2023 (04/03/2023 - 04/30/2023) | Clinical Instructor : k, monika (monika.kulkarni@exxat.com) | Home Health | PM84752645

1 - Clinical Course Evaluation R25 | 2023 - 2024 | Year 1 | Spring R26 ki jeet | Eval Cohort

Due Date : 05/05/2023

PTMAC

Click to view response summary

Section I: PROFESSIONAL BEHAVIORS

Section I: PROFESSIONAL BEHAVIORS

Skill #1 Professionalism

Objectives:

a. Abides by state licensure regulations, facility policies and procedures, and APTA Code of Ethics.

b. Confirms informed consent from patient or responsible party.

c. Projects professional image at all times.

d. Maintains patient/client confidentiality in accordance with best practice and legal standards.

e. Manages personal affairs in a manner that does not interfere with professional responsibilities.

f. Respects authority and complies with decisions of those in authority.

g. Implements, in response to an ethical situation, a plan of action that demonstrates sound moral reasoning congruent with core professional ethics and values.

Student midterm rating*

0 + 0 1/2 1 NI 0 U 0 N/A

Student midterm comments*

Student midterm comments

24/10000

CI midterm rating*

0 + 0 1/2 1 NI 0 U 0 N/A

CI midterm comments*

CI midterm comments

Select an option

Comment

0/10000

Audit Log

Update

7. Once done you can Save or Submit.

JB

Brown, Janet

janet.brownsjp@example.com

Due Date : 01/31/2024

Get Started

KASA Form

KASA Form

CSD 7000 - Capstone Project (3)*

0 Met 1 In Progress 0 In Remediation

CSD 6600 - Research Methods and Clinical Assessment of Literature (3)*

1 Met 0 In Progress 0 In Remediation

Select an option

Save

Submit

Reports


Graphical Report for Evaluation forms

The graphical reports for evaluations are only activated for PA discipline

- Graphical Report for Non-Placement Forms
- Graphical Report for Placement Forms

Once the evaluation forms are activated under each course and started receiving the responses from the preceptors and students, you now can see a graphical view of question responses for each form, facilitating trend analysis and a more comprehensive understanding of respondent feedback.

1. Select Learning Activities from your dashboard or left menu.



Learning Activities

Set up, distribute, review and grade course related activities.

2. Select the learning activity group that you have created and would like to manage from the left side menu.

Learning Activity

Course Offerings

Reports

Learning Activity Groups

+ Add Group

Class of 2021

Class of 2022*

Class of 2023

Class of 2024

Class of 2025*

Class of 2026

Emergency Medicine

Click a learning activity name to review it for a course

Course number

Search

Results found: 116

COURSE NUMBER	COURSE NAME	LEARNING ACTIVITIES	ACADEMIC YEAR	PROFESSIONAL YEAR	TERM	COHORT	ACTION
101	Mock Course	Forms/Evaluations Patient Log Timesheet Time Off	2024 - 2025	Clinical Year	Clinical Term	Class of 2025*	Set up Reports
101	Mock Course	Forms/Evaluations Patient Log Timesheet Time Off	2022 - 2023	Didactic Year	Clinical Term	Class of 2022	Set up Reports
101	Mock Course	Forms/Evaluations Patient Log Timesheet Time Off	2023 - 2024		Clinical Term	Class of 2024	Set up Reports
801	Emergency Medicine	Forms/Evaluations Patient Log Timesheet Time Off	2024 - 2025		Clinical Term	Class of 2025*	Set up Reports
801	Emergency Medicine	Forms/Evaluations Patient Log Timesheet Time Off	2025 - 2026	Clinical Year	Clinical Term	Class of 2026	Set up Reports
900	Modular Course	Forms/Evaluations Patient Log Timesheet Time Off	2021 - 2022	Didactic Year	Didactic - Spring	Class of 2022	Set up Reports
999	4th Year My Resident	Forms/Evaluations Patient Log Timesheet Time Off	2022 - 2023	Clinical Year	Clinical Term	Class of 2023	Set up Reports

3. Click on the Reports tab.

Learning Activity

Course Offerings

Reports

Learning Activity Groups

+ Add Group

Class of 2021

Class of 2022*

Class of 2023

Class of 2024

Class of 2025*

Class of 2026

Emergency Medicine

Class Of 2025*

Courses Rotations Reports

Learning Activity

Search

Results found: 13

LEARNING ACTIVITY	REPORT	DESCRIPTION
Forms/Evaluations	Aggregate report for Placement Based Forms (BETA)	View aggregated data for placement based evaluation/form for selected course(s)
Forms/Evaluations	Graphical Report for Non-Placement Forms	Graphical representation of responses for non-placement based evaluation/form for selected course(s)
Forms/Evaluations	Graphical Report for Placement Forms	Graphical representation of responses to placement based evaluation/form for the selected course(s)
Forms/Evaluations	Raw Data	All responses to any placement based evaluation/form for selected rotation(s)
Forms/Evaluations	Raw Data Report for Non Placement Forms	All responses to any evaluation/form that is not placement based for selected course(s)
Patient Log	Aggregate Log Count	View count of patient log submitted for each student across multiple rotations
Patient Log	Aggregate Raw Data	View patient log statistics for each student across multiple rotations

4. On this screen all the available reports for learning activities (Forms/Evaluations, Patient Log, Timesheet and Timeoff) are listed.

5. Click on Graphical Report for placement Forms.

Learning Activity

Course Offerings

Reports

Learning Activity Groups

+ Add Group

Class of 2021

Class of 2022*

Class of 2023

Class of 2024

Class of 2025*

Class of 2026

Emergency Medicine

Class Of 2025*

Courses Rotations Reports

Learning Activity

Search

Results found: 13

LEARNING ACTIVITY	REPORT	DESCRIPTION
Forms/Evaluations	Aggregate report for Placement Based Forms (BETA)	View aggregated data for placement based evaluation/form for selected courses(s)
Forms/Evaluations	Graphical Report for Non-Placement Forms	Graphical representation of responses for non-placement based evaluation/form for selected course(s)
Forms/Evaluations	Graphical Report for Placement Forms	Graphical representation of responses to placement based evaluation/form for the selected course(s)
Forms/Evaluations	Raw Data	All responses to any placement based evaluation/form for selected rotation(s)
Forms/Evaluations	Raw Data Report for Non Placement Forms	All responses to any evaluation/form that is not placement based for selected course(s)
Patient Log	Aggregate Log Count	View count of patient log submitted for each student across multiple rotations
Patient Log	Aggregate Raw Data	View patient log statistics for each student across multiple rotations

6. Click on Graphical Report for non-placement Forms.

The screenshot shows the 'Learning Activity' interface for 'Class Of 2025*'. On the left, a sidebar lists 'Course Offerings' and 'Reports'. Under 'Reports', 'Learning Activity Groups' are listed, with 'Class of 2025*' selected. The main area shows a 'Reports' tab with a search bar and a table of results. The table has three columns: 'LEARNING ACTIVITY', 'REPORT', and 'DESCRIPTION'. The 'REPORT' column lists various report types, with 'Graphical Report for Non-Placement Forms' highlighted by a red box.

LEARNING ACTIVITY	REPORT	DESCRIPTION
Forms/Evaluations	Aggregate report for Placement Based Forms - BETA	View aggregated data for placement based evaluation/form for selected course(s)
Forms/Evaluations	Graphical Report for Non-Placement Forms	Graphical representation of responses for non-placement based evaluation/form for selected course(s)
Forms/Evaluations	Graphical Report for Placement Forms	Graphical representation of responses to placement based evaluation/form for the selected course(s)
Forms/Evaluations	Raw Data	All responses to any placement based evaluation/form for selected rotation(s)
Forms/Evaluations	Raw Data Report for Non Placement Forms	All responses to any evaluation/form that is not placement based for selected course(s)
Patient Log	Aggregate Log Count	View count of patient log submitted for each student across multiple rotations
Patient Log	Aggregate Raw Data	View patient log statistics for each student across multiple rotations

7. On this screen, all the course offerings will remain selected by default. You can choose to exclude them by clicking on 'Show More'. Then select the form from the

The screenshot shows the configuration screen for 'Graphical Report for Placement Forms (Forms/Evaluations)'. It includes a 'Select Course Offerings' button, a list of 'Courses Selected(50/50):' with 'Mock Course, Class of 2022', 'Mock Course, Class of 2025*', and 'Mock Course, Class of 2024'. A 'Show More' button is highlighted with a red box. Below, there are dropdown menus for 'Forms/Evaluations' (set to 'End of Rotation Evaluation by P...'), 'Rotation' (set to 'Block 1, Block 2, Block 3, Block ...'), 'Settings' (set to 'Allergy and Immunology, Endo...'), and 'Status' (set to 'In Progress By Preceptor, Pendi...'). A '+ Generate Report' button is on the right.

8. 'Forms/Evaluations' drop down.

The screenshot shows the 'Forms/Evaluations' dropdown menu open. The 'Filters:' label is next to the dropdown. The menu lists several options: 'End of Rotation Evaluation by Precept...', 'Preceptor Final Evaluation of Student -...', 'Student Evaluation of Clinical Rotation...', and 'Student evaluation of guest lecture(m...'. The first option is highlighted.

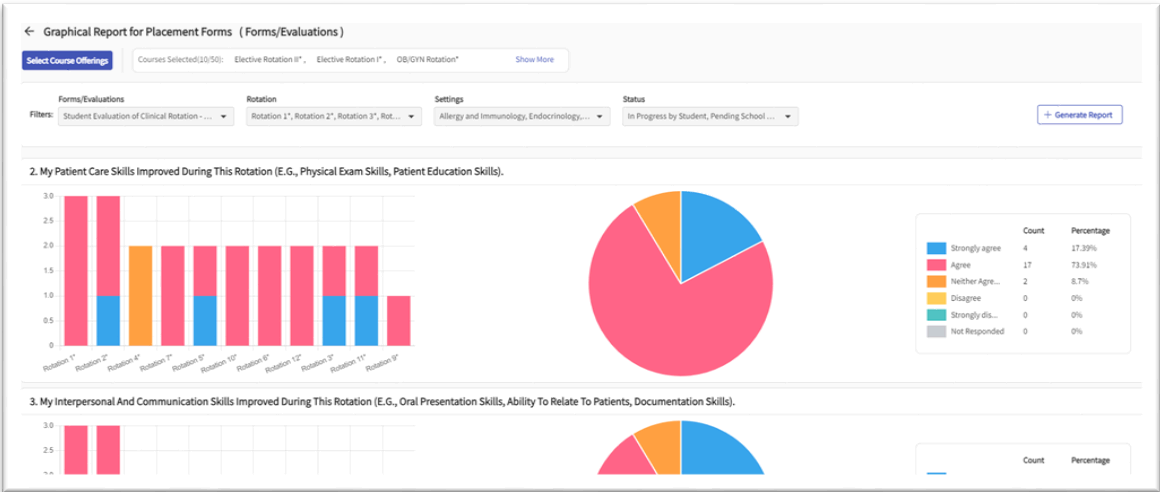
9. Select the relevant 'Rotation' and 'Settings' that you are looking for. Lastly select the relevant 'Status'. Click on Generate Report to run the report.

The screenshot shows the configuration screen for 'Graphical Report for Placement Forms (Forms/Evaluations)'. All the configuration fields are highlighted with red boxes: 'Forms/Evaluations' (set to 'End of Rotation Evaluation by P...'), 'Rotation' (set to 'Block 1, Block 2, Block 3, Block ...'), 'Settings' (set to 'Allergy and Immunology, Endo...'), 'Status' (set to 'In Progress By Preceptor, Pendi...'), and the '+ Generate Report' button.

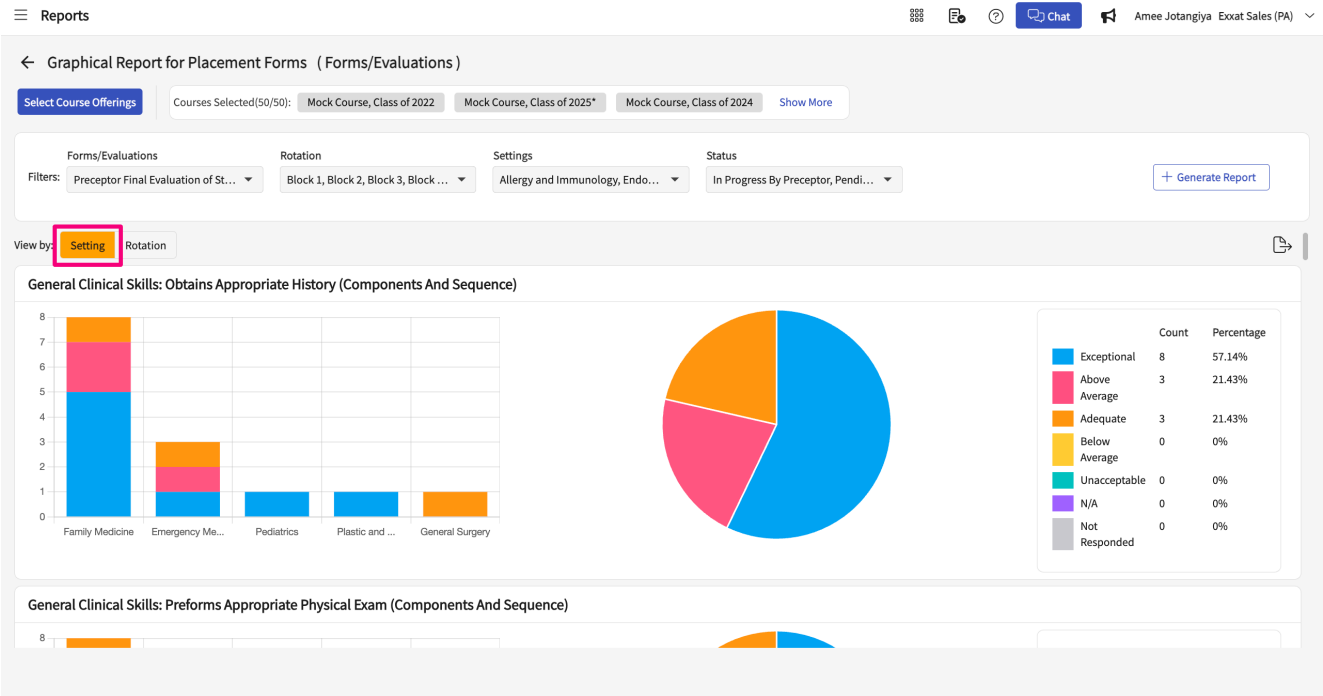
10. The system will show the data in a graphical format as per the questions mentioned in the form.



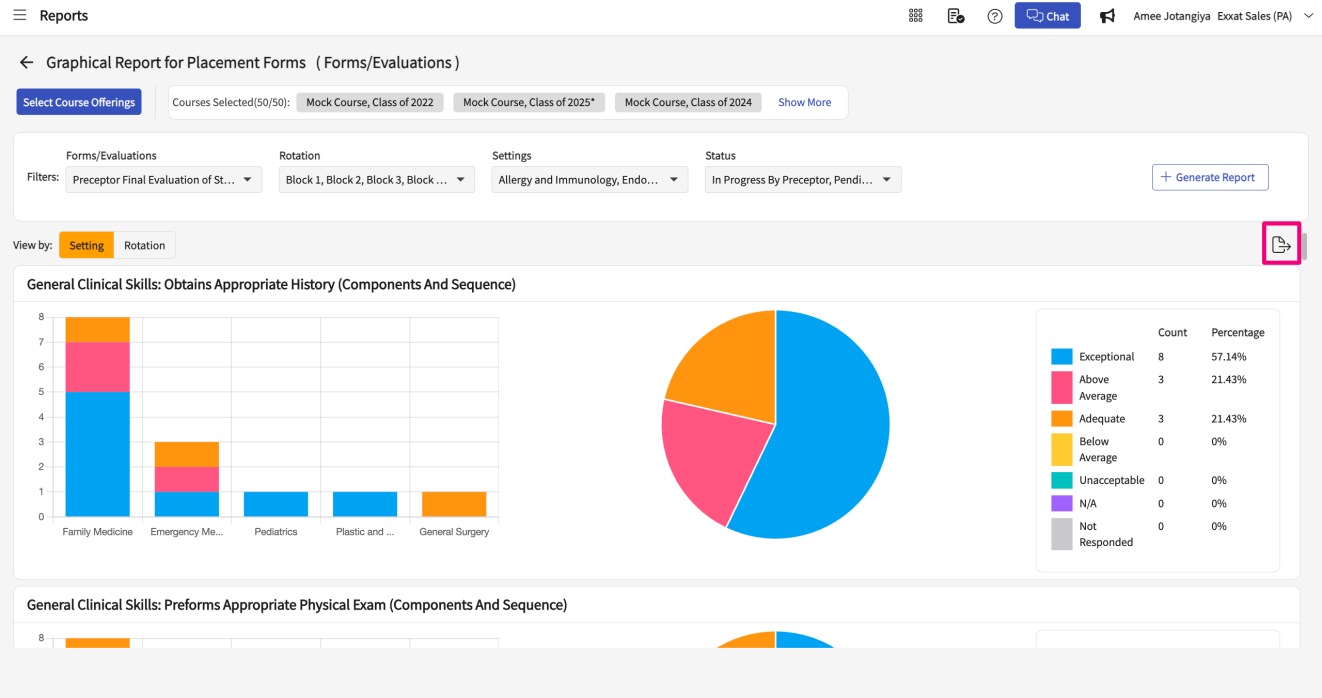
11. When you scroll down from the right scroll bar in the page, you will be able to see the graphical data for the next & remaining questions.



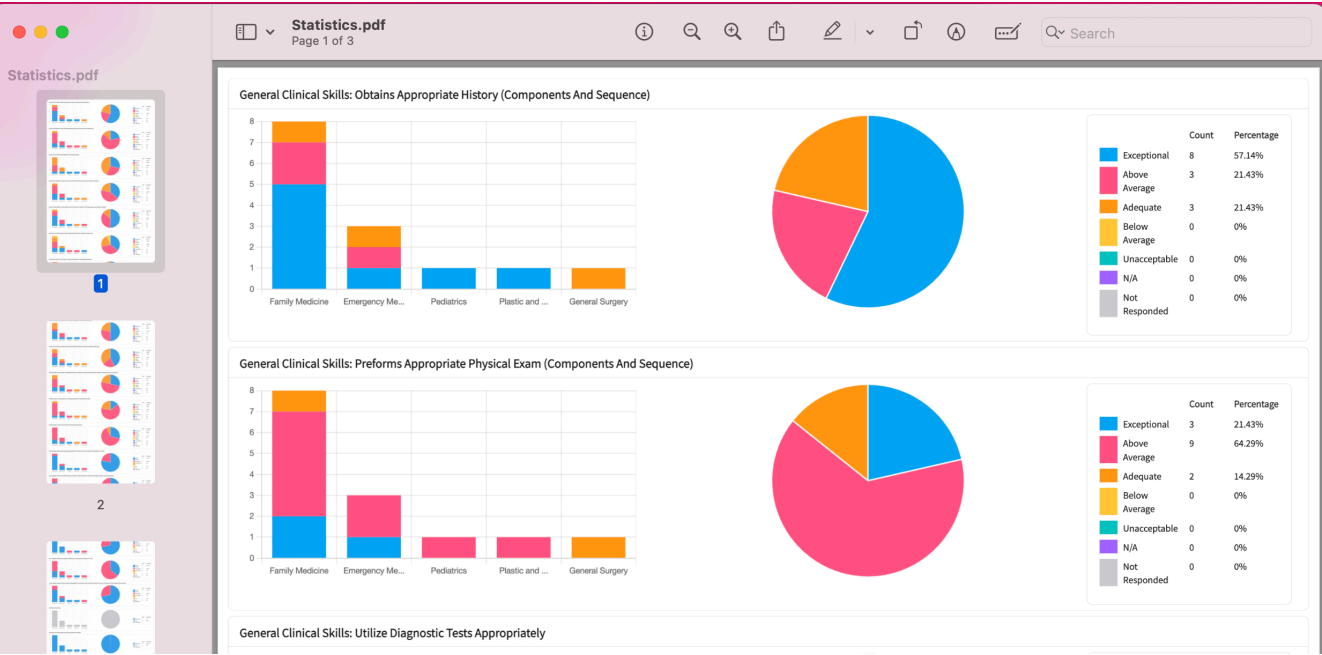
12. Scroll up to the top and click on the 'Setting' tab to check the report as per individual settings.



13. On the right side click on the download option to extract this report in pdf format.



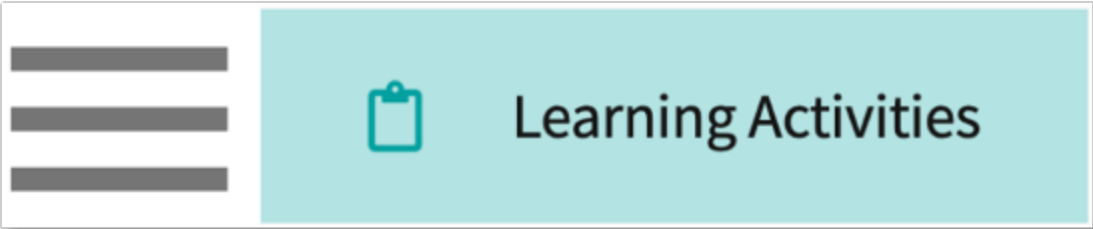
14. In pdf format, the report will look like this.



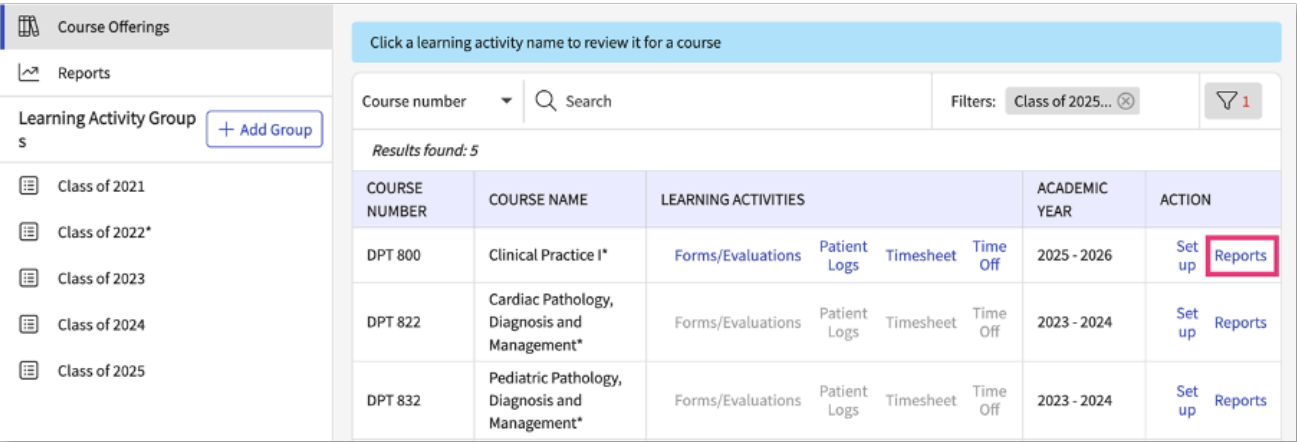
Viewing Aggregate Reports For Scored Evaluations

You can do more than just review learning activities with reports available in Prism.

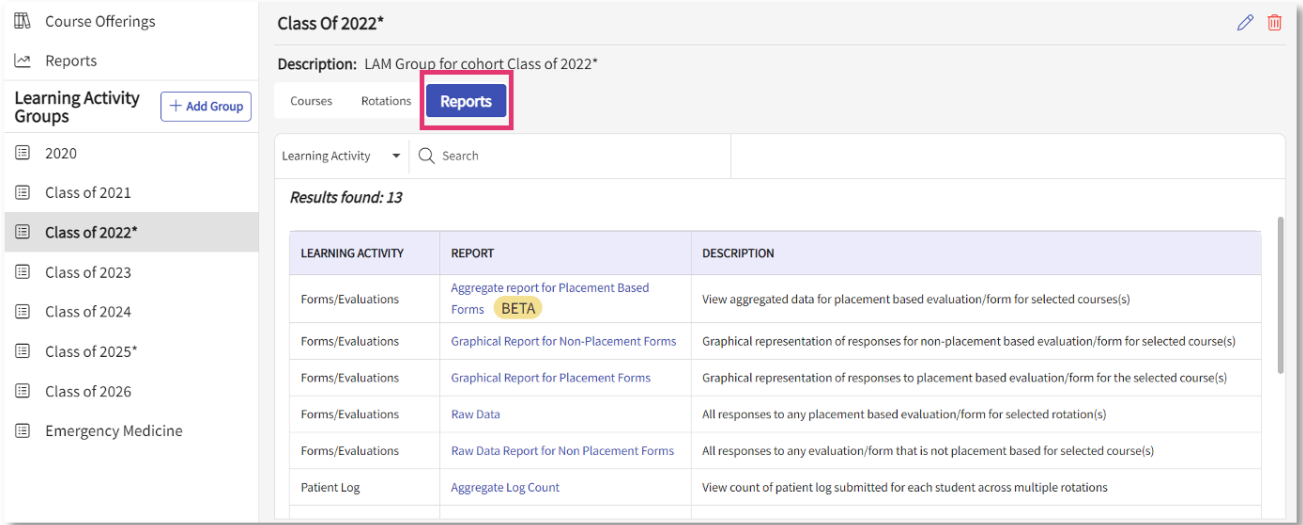
1. Select Learning Activities from your dashboard or left menu.



2. You'll have three different options when it comes to reports, select the option that best fits your needs!
3. Select Reports for an individual course if you would like to focus on one course only. The reports list will automatically filter by the selected course.



4. Select a learning activity group and click on the Reports tab. The reports list will automatically filter by the courses bundled in the learning activity group.



5. If you would like to instead view reports and filter by any other grouping, select Reports from the left panel.

Course Offerings

Reports

Learning Activity Groups

Class of 2021

Class of 2022*

Class of 2023

Class of 2024

Class of 2025

+ Add Group

Click a learning activity name to review it for a course

Course number

Search

Filters: Class of 2025...

1

Results found: 5

COURSE NUMBER	COURSE NAME	LEARNING ACTIVITIES	ACADEMIC YEAR	ACTION
DPT 800	Clinical Practice I*	Forms/Evaluations Patient Logs Timesheet Time Off	2025 - 2026	Set up Reports
DPT 822	Cardiac Pathology, Diagnosis and Management*	Forms/Evaluations Patient Logs Timesheet Time Off	2023 - 2024	Set up Reports
DPT 832	Pediatric Pathology, Diagnosis and Management*	Forms/Evaluations Patient Logs Timesheet Time Off	2023 - 2024	Set up Reports

6. The reports list will be categorized by learning activity type

Learning Activities Home > Reports

LEARNING ACTIVITY	REPORT	DESCRIPTION
Forms/Evaluations	Aggregate report for Placement Based Forms BETA	View aggregated data for placement based evaluation/form for selected course(s)
Forms/Evaluations	Graphical Report for Non-Placement Forms	Graphical representation of responses for non-placement based evaluation/form for selected course(s)
Forms/Evaluations	Graphical Report for Placement Forms	Graphical representation of responses to placement based evaluation/form for the selected course(s)
Forms/Evaluations	Raw Data	All responses to any placement based evaluation/form for selected rotation(s)
Forms/Evaluations	Raw Data Report for Non Placement Forms	All responses to any evaluation/form that is not placement based for selected course(s)

7. You'll find common features among the reports available. Below are a few samples:

← Aggregate report for Placement Based Forms BETA (Forms/Evaluations)

Select Course Offerings

Courses Selected(10/50): Family Medicine Rotation*, Class of 2022* Emergency Medicine Rotation*, Class of 2022* General Surgery Rotation*, Class of 2022* Show More

Forms/Evaluations

Filters: Preceptor Final Evaluatio...

Rotation: Block 1*, Block 2*, Block ...

Settings: Allergy and Immunology, ...

Status: In Progress By Preceptor, ...

+ Generate Report

Export to Excel

Group By: Student

Order Of Selection: Student

Evaluation Form Filter

STUDENT	NO. OF FORMS COMPLETED	GENERAL CLINICAL SKILLS: OBTAINS APPROPRIATE HISTO...	GENERAL CLINICAL SKILLS: PREFORMS APPROPRIATE PHYS...	GENERAL CLINICAL SKILLS: UTILIZE DIAGNOSTIC TESTS ...	GENERAL CLINICAL SKILLS: DEVELOPS AND IMPLEMENTS T...	GENERAL CLINICAL SKILLS: COMMUNICATES CLINICAL INF...
Gonzalez, Patricia	1	5	3	3	4	4
Average	1	5	3	3	4	4

8. When working with Aggregate Reports for Scored Evaluations, the school can choose to categorize the data according to student, preceptor, location, site, setting, rotation, and course.

The displayed score in the report will depend on the applied filter.

Aggregate report for Placement Based Forms (Forms/Evaluations)

Select Course Offerings

Courses Selected(50/50): Mock Course, Class of 2025* Mock Course, Class of 2022 Mock Course, Class of 2024 Show More

Rotation

Setting

Site

Location

Preceptor

Student

Rotation

Block 1, Block 2, Block 3, Block ...

Settings

Allergy and Immunology, Endo...

Status

In Progress By Preceptor, Pendi...

+ Generate Report

Order Of Selection: Student, Site, Preceptor

	PRECEPTOR	NO. OF FORMS COMPLETED	GENERAL CLINICAL SKILLS: OBTAINS APPROPRIATE HISTO...	GENERAL CLINICAL SKILLS: PREFORMS APPROPRIATE PHYS...	GENERAL CLINICAL SKILLS: UTILIZE DIAGNOSTIC TESTS ...
	Alice Li	2	5	4	4.5
Alliance Medical Center*	Kanthe Kalidindi	1	4	5	3
	Average	3	4.5	4.5	3.75
Abundant Health*	George Bailey	1	5	4	4
	Average	1	5	4	4
Adaptial	John Doe	1	3	4	3
	Average	1	3	4	3

9. For instance, when you apply a filter based on Student and Preceptor, the score will appear as shown in the following example.

Reports

Aggregate report for Placement Based Forms (Forms/Evaluations)

Select Course Offerings

Courses Selected(50/50): Mock Course, Class of 2025* Mock Course, Class of 2022 Mock Course, Class of 2024 Show More

Forms/Evaluations

Filters: Preceptor Final Evaluatio...

Group By: Student

Rotation

Block 1, Block 2, Block 3, ...

Settings

Allergy and Immunology, ...

Status

In Progress By Preceptor, ...

+ G

Order Of Selection: Student

STUDENT	NO. OF FORMS COMPLETED	GENERAL CLINICAL SKILLS: OBTAINS APPROPRIATE HISTO...	GENERAL CLINICAL SKILLS: PREFORMS APPROPRIATE PHYS...	GENERAL CLINICAL SKILLS: UTILIZE DIAGNOSTIC TESTS ...	GENERAL CLINICAL SKILLS: DEVELOPS AND IMPLEMENTS T...
Evans, Kevin	2	4	4	4	4.5
Adkins, Brian	1	3	1	1	2
Gonzalez, Patricia	1	5	3	3	4
Average	4	4	2.67	2.67	3.5

10. After extracting the report, the data will be displayed as shown in the spreadsheet below.

	A	B	C	D	E	F	G	H	I	J	K	L
	Site	Preceptor	Rotation	Rotation Start Date	Rotation End Date	Setting	Course	Course Code	Location	No. of Forms completed	General Clinical Skills: Obtains appropriate history and physical	General Clinical Skills: Performs appropriate physical examination
1	Alliance Medical Center*	Alice Li	Rotation 4*	9/1/23	12/31/25	Pediatrics	Pediatrics Rotation	PA 604	Alliance Medical Center	1	5	4
2	Alliance Medical Center*	Alice Li	Rotation 4*	9/1/23	12/31/25	Pediatrics	Pediatrics Rotation	PA 604	Average	1	5	4
3	Alliance Medical Center*	Alice Li	Rotation 4*	9/1/23	12/31/25	Pediatrics	Average			1	5	4
4	Alliance Medical Center*	Alice Li	Rotation 4*	9/1/23	12/31/25	Pediatrics	Average			1	5	4
5	Alliance Medical Center*	Alice Li	Rotation 4*	9/1/23	12/31/25	Average				1	5	4
6	Alliance Medical Center*	Alice Li	Rotation 10*	7/1/23	12/31/25	Emergency Medicine	Gradebook course	PA 111	Alliance Medical Center	1	4	5
7	Alliance Medical Center*	Alice Li	Rotation 10*	7/1/23	12/31/25	Emergency Medicine	Gradebook course	PA 111	Average	1	4	5
8	Alliance Medical Center*	Alice Li	Rotation 10*	7/1/23	12/31/25	Emergency Medicine	Average			1	4	5
9	Alliance Medical Center*	Alice Li	Rotation 10*	7/1/23	12/31/25	Average				1	4	5
10	Alliance Medical Center*	Alice Li	Rotation 12*	1/9/23	12/31/25	Family Medicine	Gradebook course	PA 111	Alliance Medical Center	1	5	4
11	Alliance Medical Center*	Alice Li	Rotation 12*	1/9/23	12/31/25	Family Medicine	Gradebook course	PA 111	Average	1	5	4
12	Alliance Medical Center*	Alice Li	Rotation 12*	1/9/23	12/31/25	Family Medicine	Average			1	5	4
13	Alliance Medical Center*	Alice Li	Rotation 12*	1/9/23	12/31/25	Average				1	5	4
14	Alliance Medical Center*	Alice Li	Average							3	4.67	4.33
15	Alliance Medical Center*	Kanthi Kalidindi	Rotation 11 (clinical history)	8/1/23	12/31/25	Family Medicine	Family Medicine Rotation	PA 601	Alliance Medical Center	1	4	5
16	Alliance Medical Center*	Kanthi Kalidindi	Rotation 11 (clinical history)	8/1/23	12/31/25	Family Medicine	Family Medicine Rotation	PA 601	Average	1	4	5
17	Alliance Medical Center*	Kanthi Kalidindi	Rotation 11 (clinical history)	8/1/23	12/31/25	Family Medicine	Average			1	4	5
18	Alliance Medical Center*	Kanthi Kalidindi	Rotation 11 (clinical history)	8/1/23	12/31/25	Average				1	4	5
19	Alliance Medical Center*	Kanthi Kalidindi	Average							1	4	5
20	Alliance Medical Center*	Average								4	4.33	4.67
21	Blossomvale Clinic	Skylar Ford	Rotation 12*	1/9/23	12/31/25	Plastic and Reconstructive Surgery	General Surgery Rotation	PA 603	Blossomvale Clinic	1	5	4
22	Blossomvale Clinic	Skylar Ford	Rotation 12*	1/9/23	12/31/25	Plastic and Reconstructive Surgery	General Surgery Rotation	PA 603	Average	1	5	4
23	Blossomvale Clinic	Skylar Ford	Rotation 12*	1/9/23	12/31/25	Plastic and Reconstructive Surgery	Average			1	5	4
24	Blossomvale Clinic	Skylar Ford	Rotation 12*	1/9/23	12/31/25	Average				1	5	4
25	Blossomvale Clinic	Skylar Ford	Rotation 3*	12/5/22	12/31/25	Family Medicine	General Surgery Rotation	PA 603	Blossomvale Clinic	1	5	4
26	Blossomvale Clinic	Skylar Ford	Rotation 3*	12/5/22	12/31/25	Family Medicine	General Surgery Rotation	PA 603	Average	1	5	4
27	Blossomvale Clinic	Skylar Ford	Rotation 3*	12/5/22	12/31/25	Family Medicine	Average			1	5	4
28	Blossomvale Clinic	Skylar Ford	Rotation 3*	12/5/22	12/31/25	Average				1	5	4
29	Blossomvale Clinic	Skylar Ford	Average							2	5	4
30	Blossomvale Clinic	John Smith	Rotation 2*	11/7/22	12/31/25	Family Medicine	Family Medicine Rotation	PA 601	Blossomvale Clinic	1	4	5
31	Blossomvale Clinic	John Smith	Rotation 2*	11/7/22	12/31/25	Family Medicine	Family Medicine Rotation	PA 601	Average	1	4	5
32	Blossomvale Clinic	John Smith	Rotation 2*	11/7/22	12/31/25	Family Medicine	Average			1	4	5
33	Blossomvale Clinic	John Smith	Rotation 2*	11/7/22	12/31/25	Average				1	4	5
34	Blossomvale Clinic	John Smith	Average							1	4	5
35	Blossomvale Clinic	Average								3	4.6	4.6