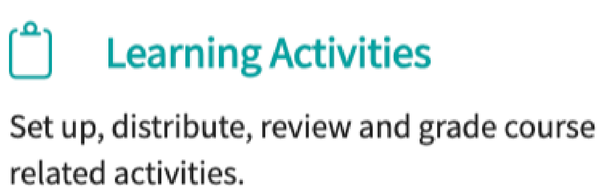
This article serves as a comprehensive guide for administrators and educators involved in distributing and reviewing evaluations during student placements. Learn how to effectively distribute standard or custom evaluation forms to clinical sites and manage the recipient's list. Discover step-by-step 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

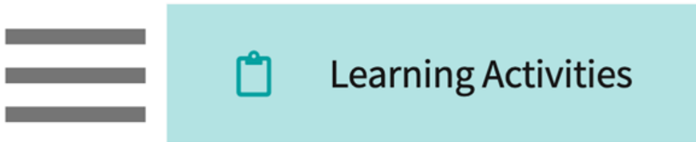
During a placement, if you use standard or custom forms that need to be completed by clinical sites, you can distribute them when needed!

1. Go to Dashboard and click Learning Activities.

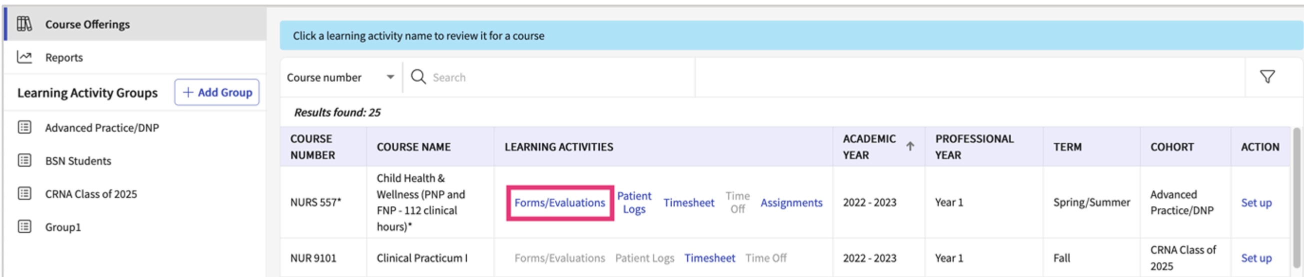


OR

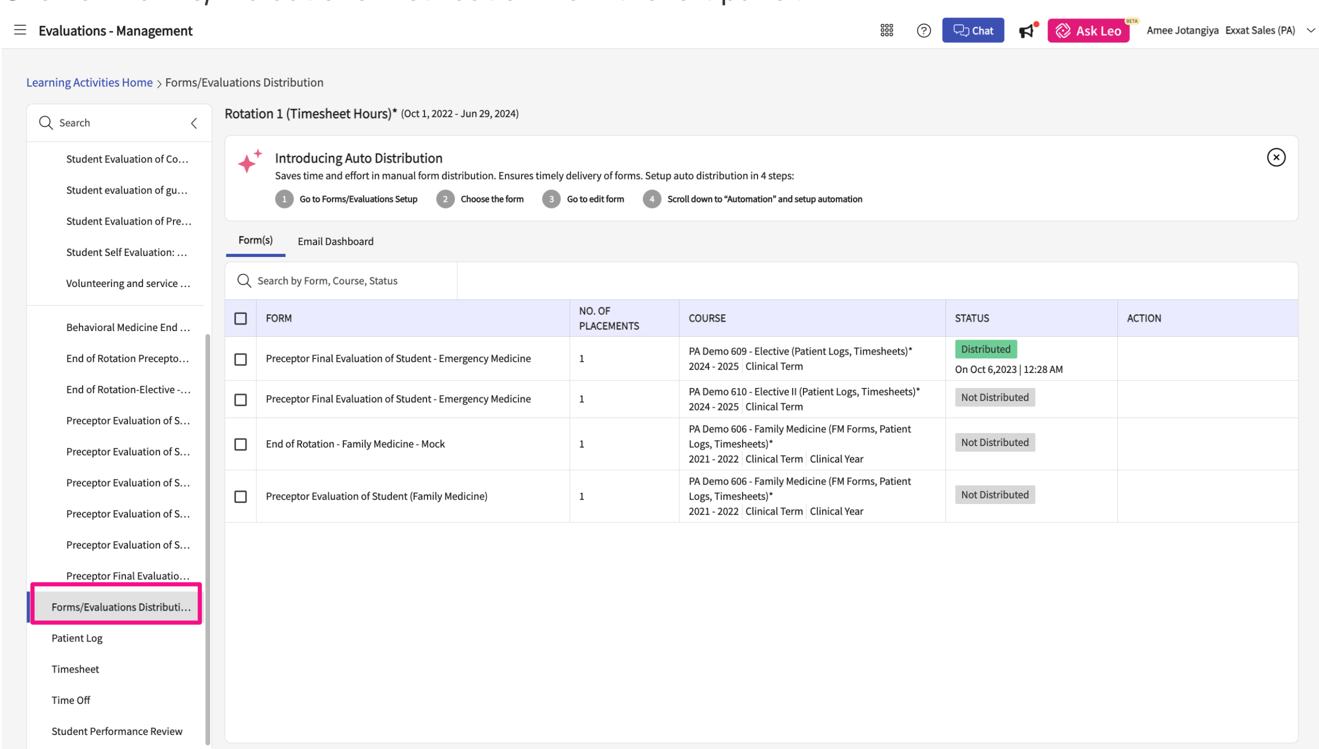
2. Go to menu on the top left corner and click Learning Activities.



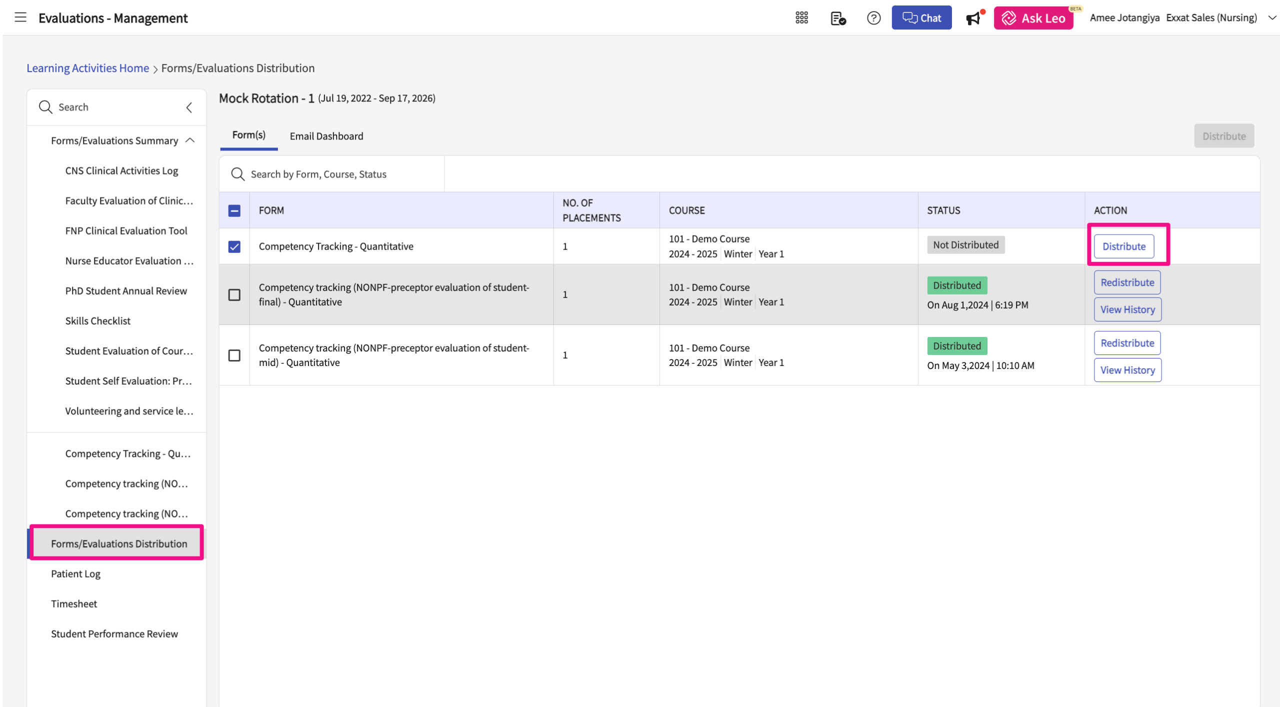
3. Find and select the course you'd like to distribute evaluations for. Select Forms/Evaluations from the Learning Activities column.



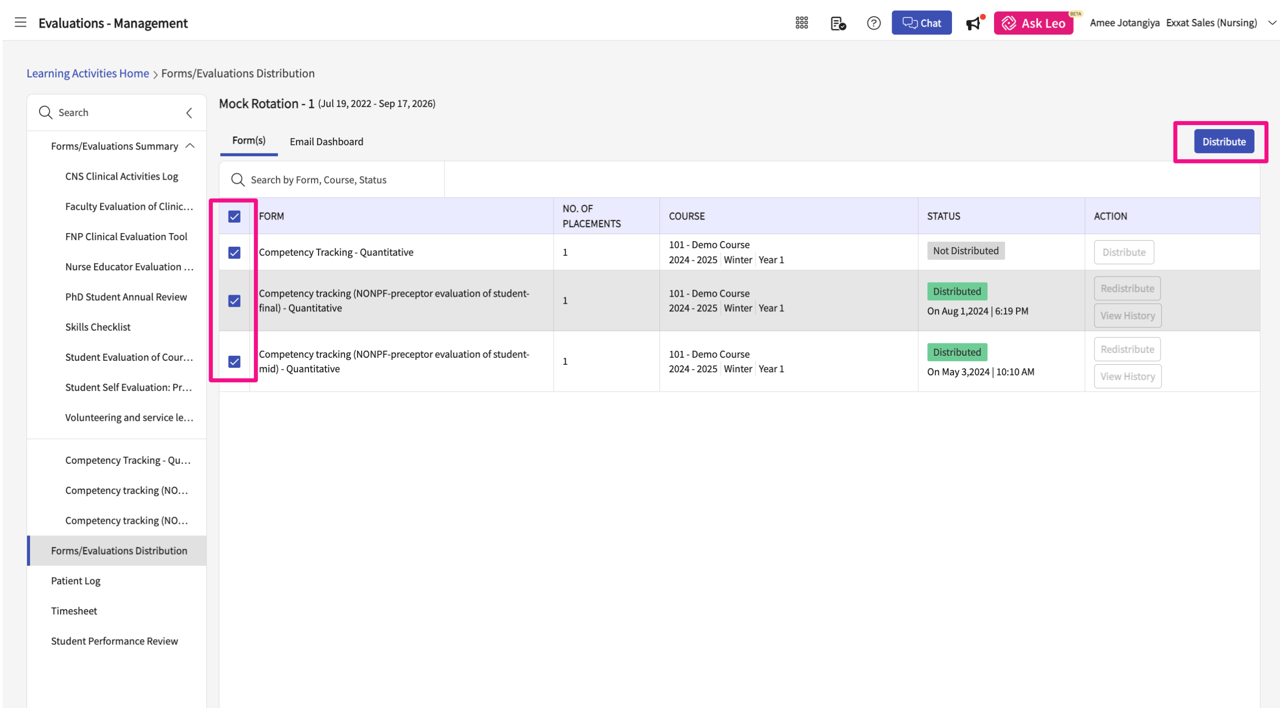
4. Click on Forms/Evaluations Distribution from the left panel.



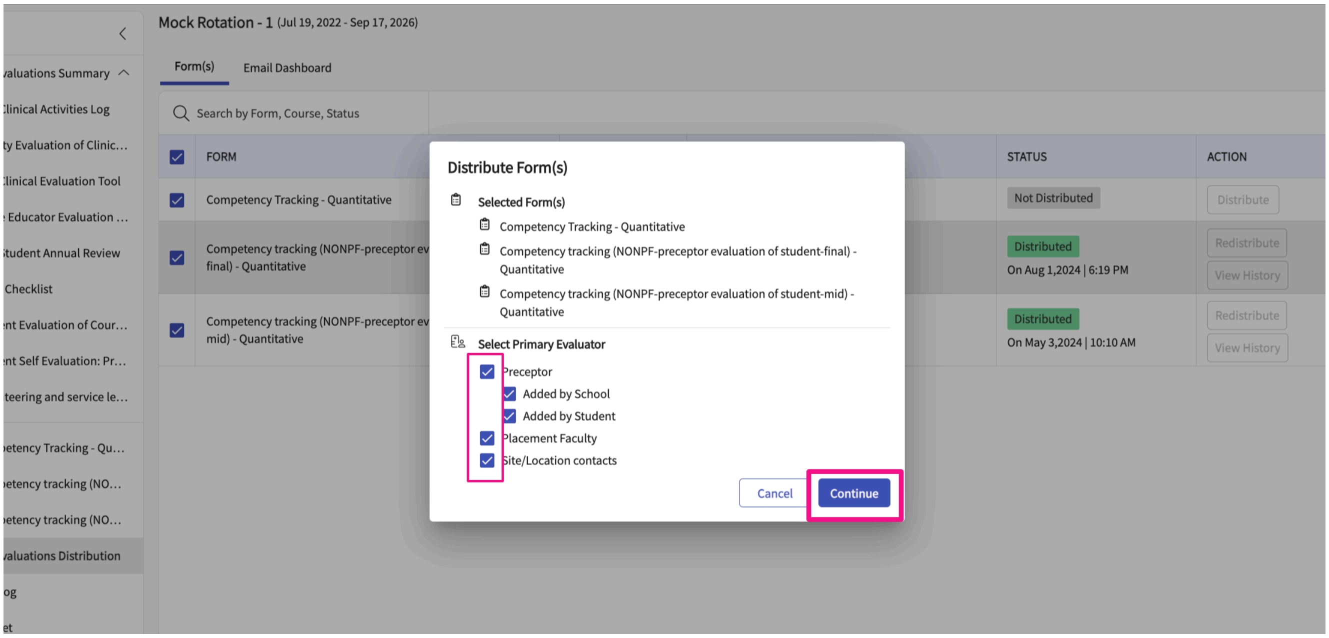
5. Select the forms you want to distribute, redistribute, or schedule for a future date.
    1. If you select one form to distribute, then click Distribute under the Action column for the required form.



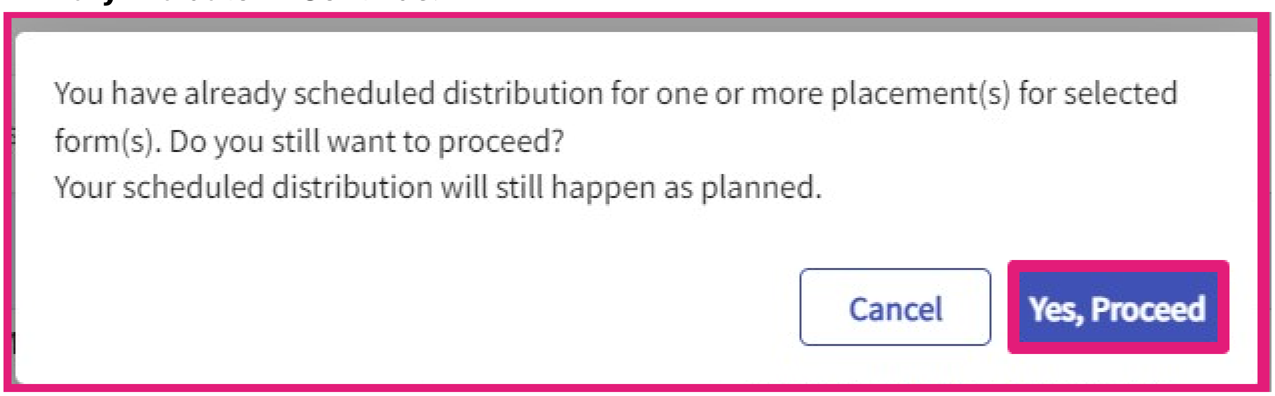
2. If you want to distribute multiple forms, then select the checkboxes for the required forms and click **Distribute** above the forms table.



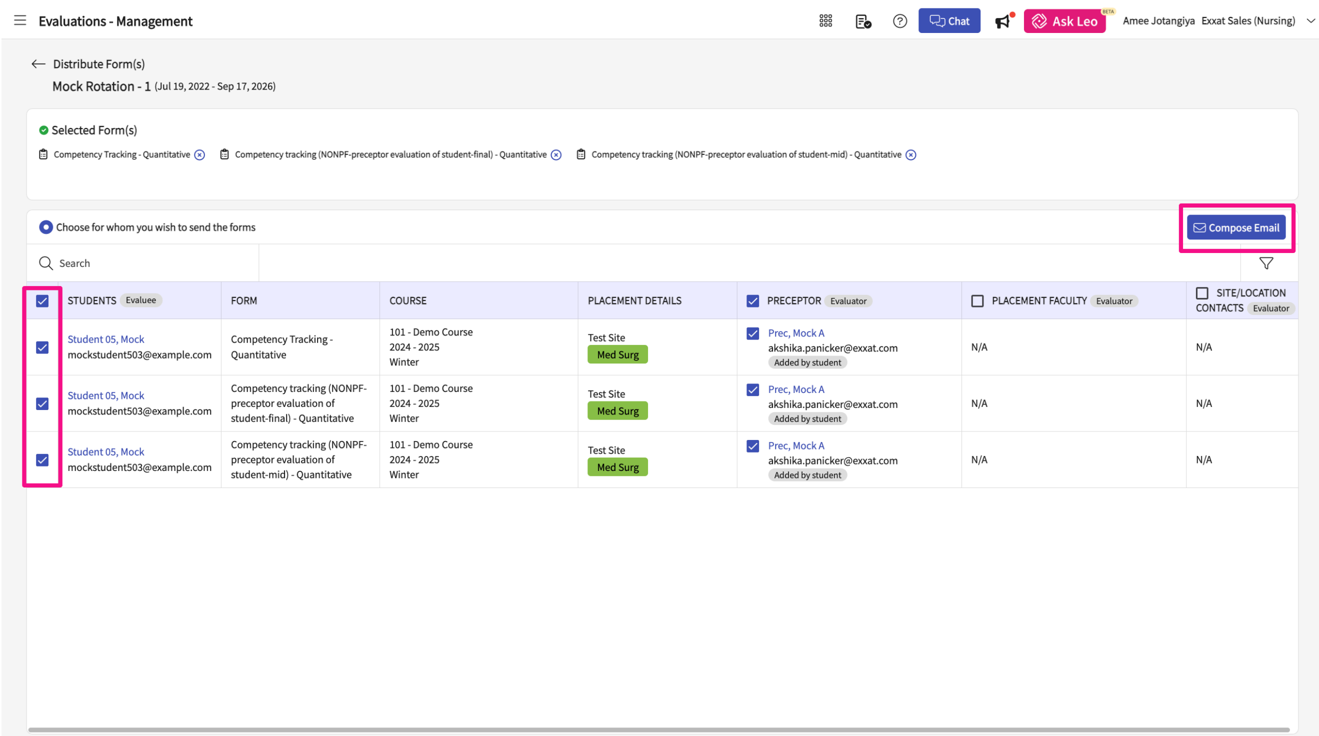
6. On the Distribute Form(s) window, you can view the selected form name. In the Select Primary Evaluator section, select the evaluator you want to send the forms to and click Continue.



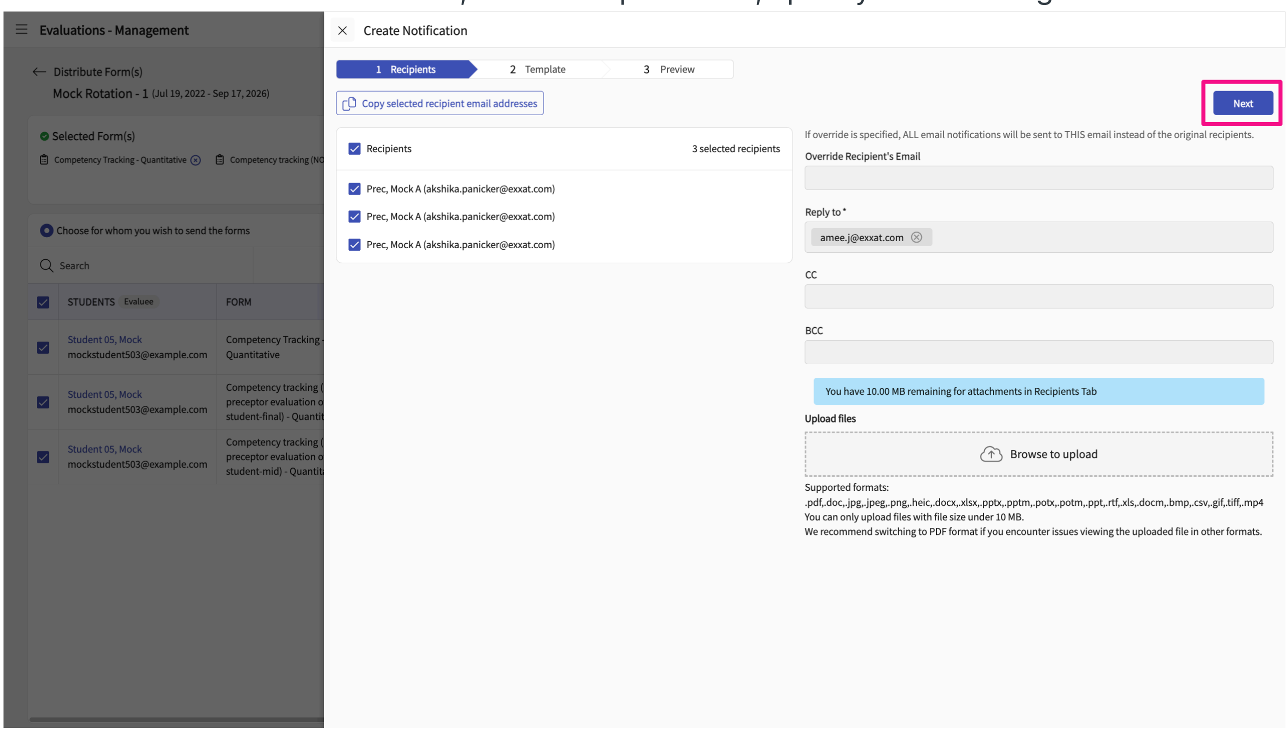
7. If the distribution is already scheduled, you can still continue to create another schedule for the same form. Click **Distribute**, and click **Yes, Proceed** to create multiple schedules. Select the **Primary Evaluator > Continue**.



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



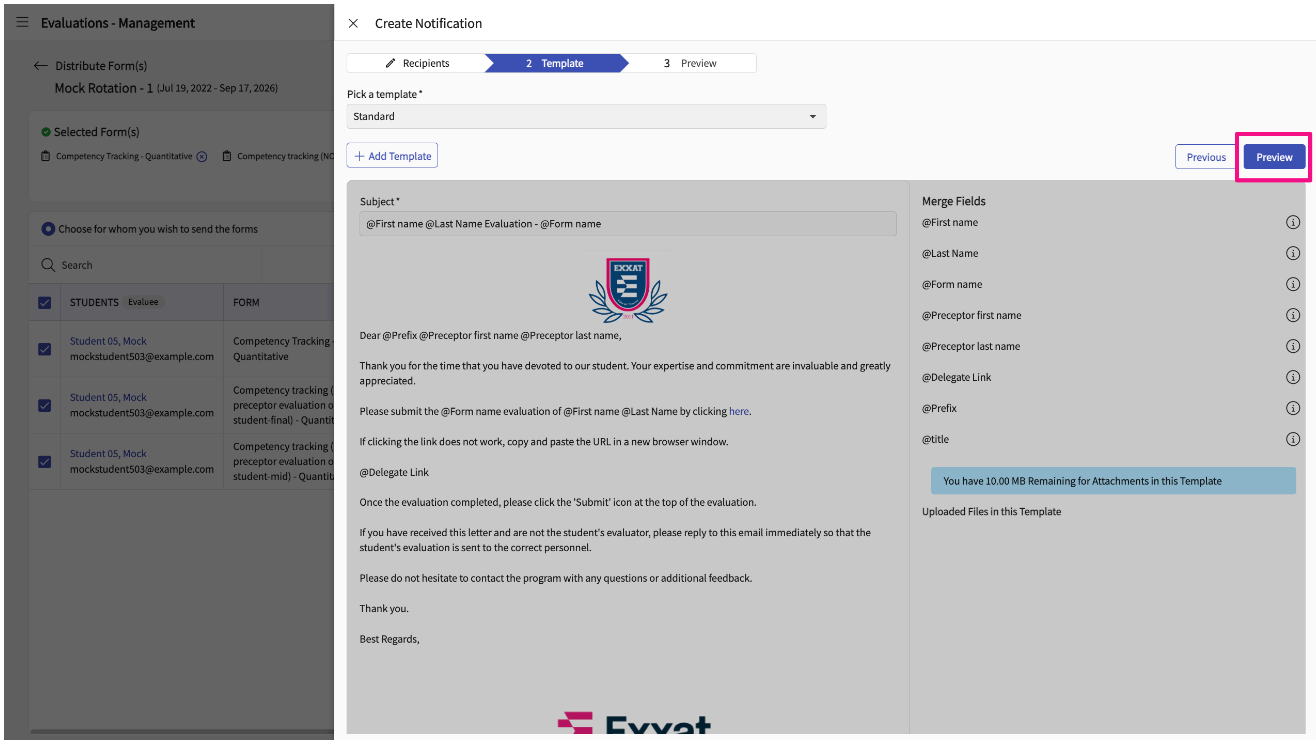
9. Click Compose Email.
   1. In the Create Notifications screen, in the Recipients tab, specify the following:



      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 recipents
      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.

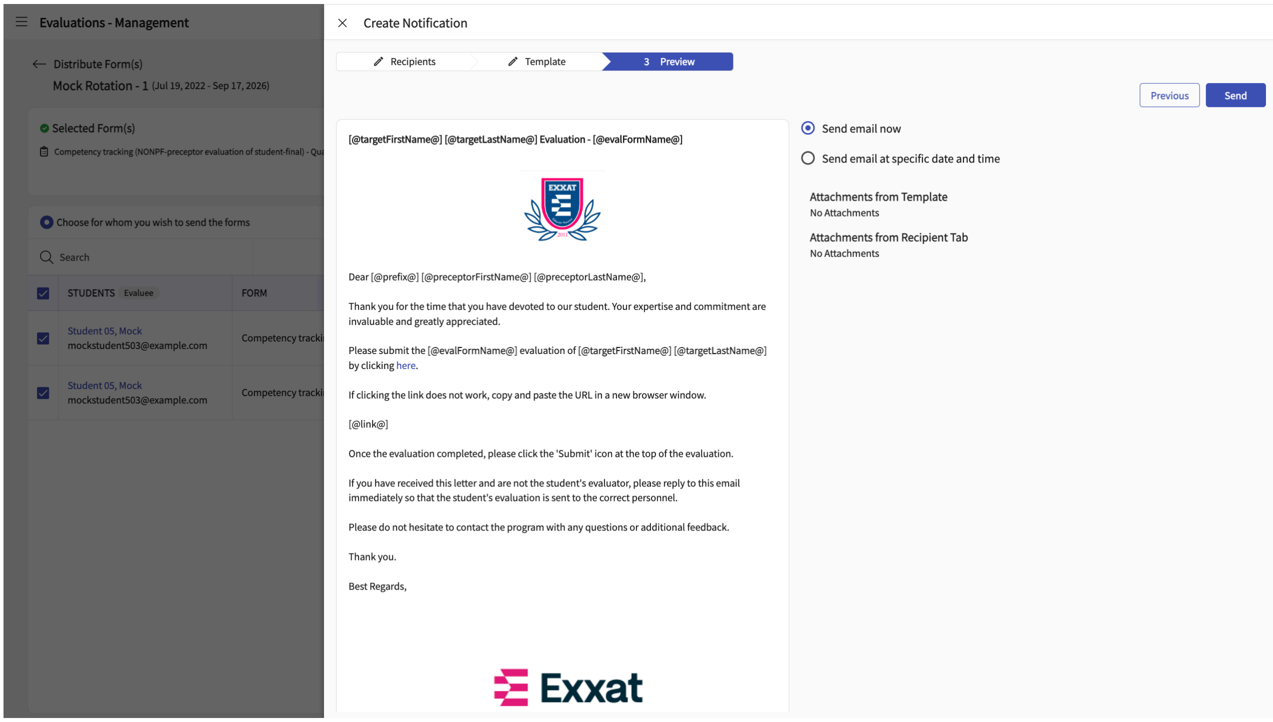
    5. Click Next.

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



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.

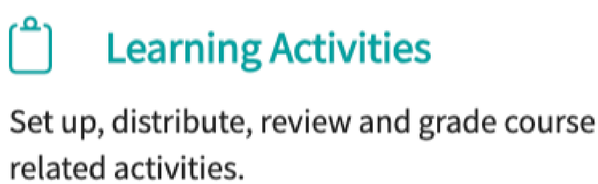
2. On the Preview section, you can review your email and select one of the following:



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**.

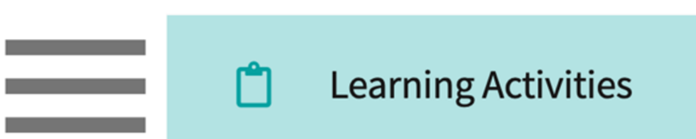
Redistributing Evaluations

1. Go to Dashboard and click Learning Activities.

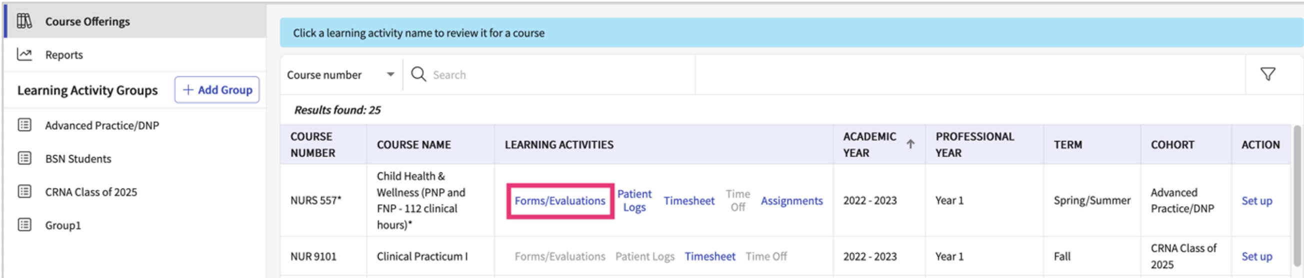


OR

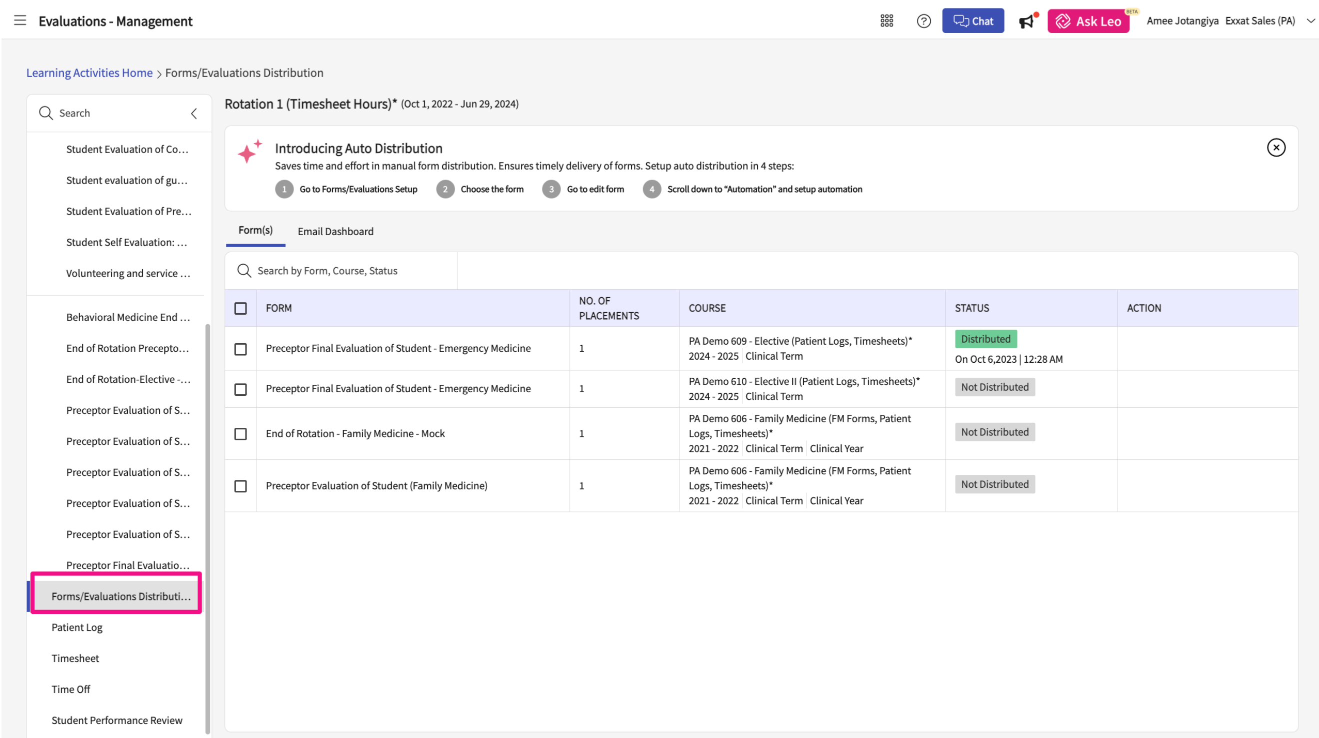
2. Go to menu on the top left corner and click Learning Activities.



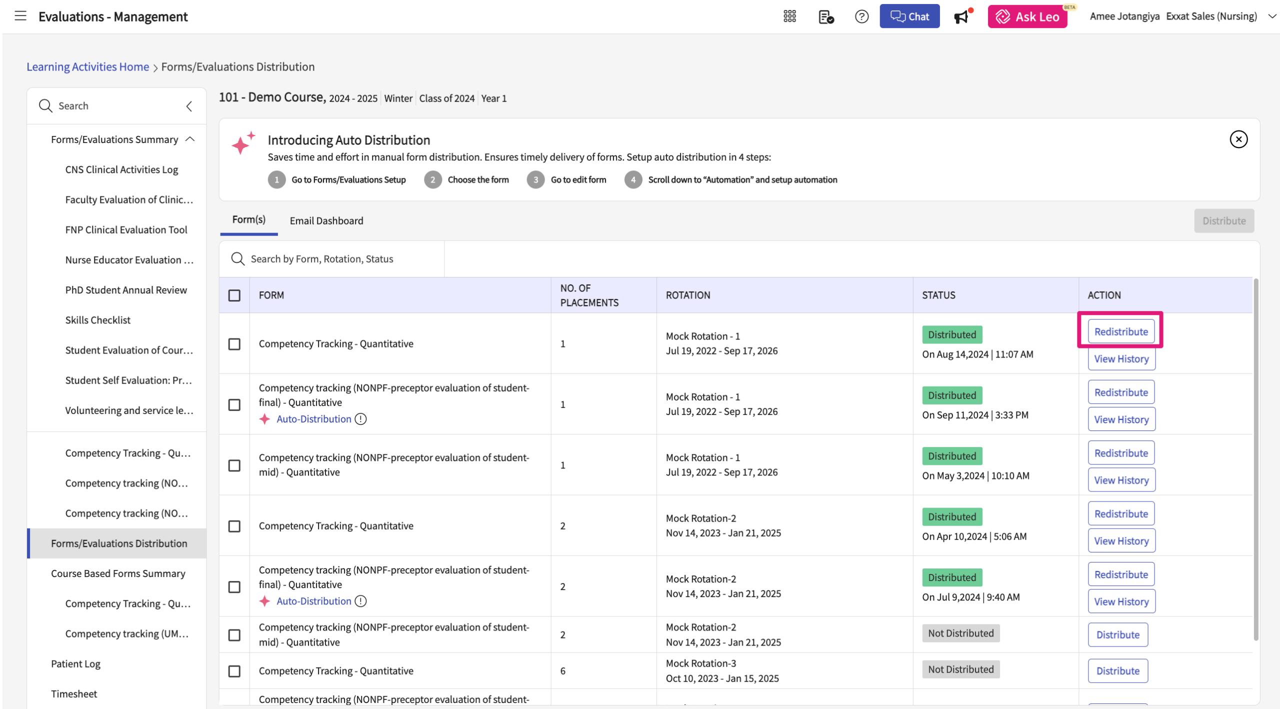
3. Find and select the course you'd like to distribute evaluations for. Select Forms/Evaluations from the Learning Activities column.



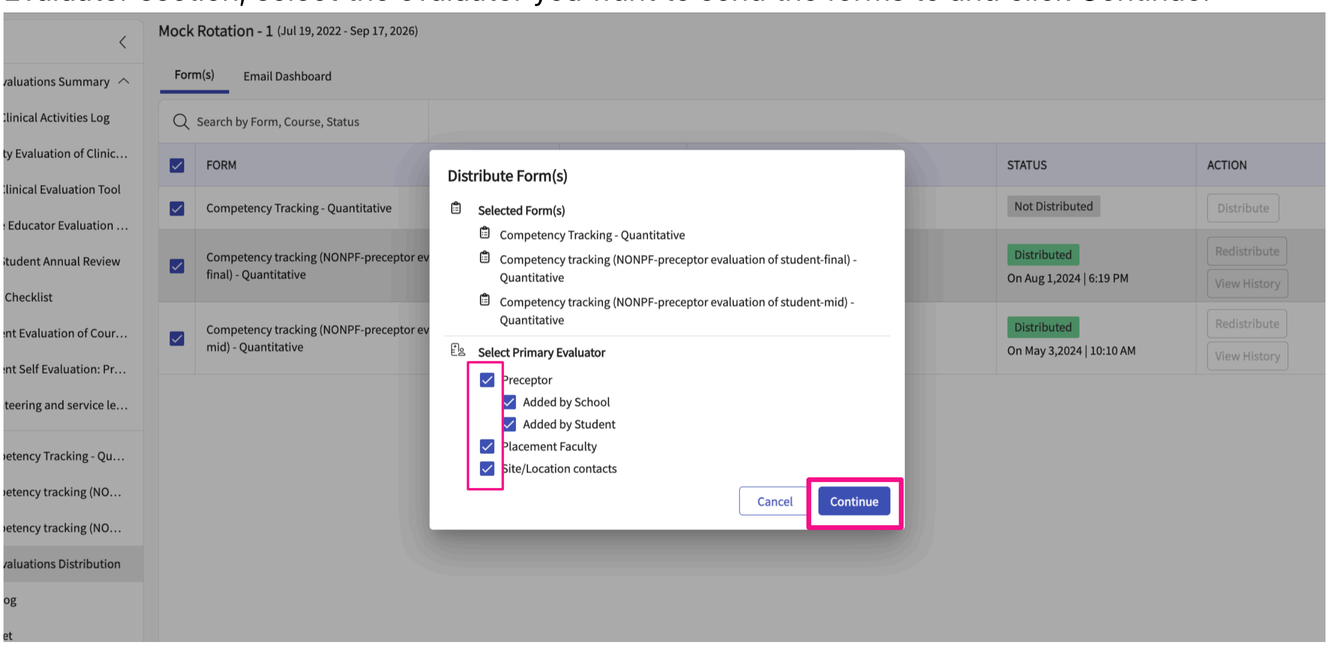
4. Click on Forms/Evaluations Distribution from the left panel.



5. Select the forms you want to distribute, redistribute, or schedule for a future date.
    1. If you select one form to redistribute, then click **redistribute** under the Action column for the required form.

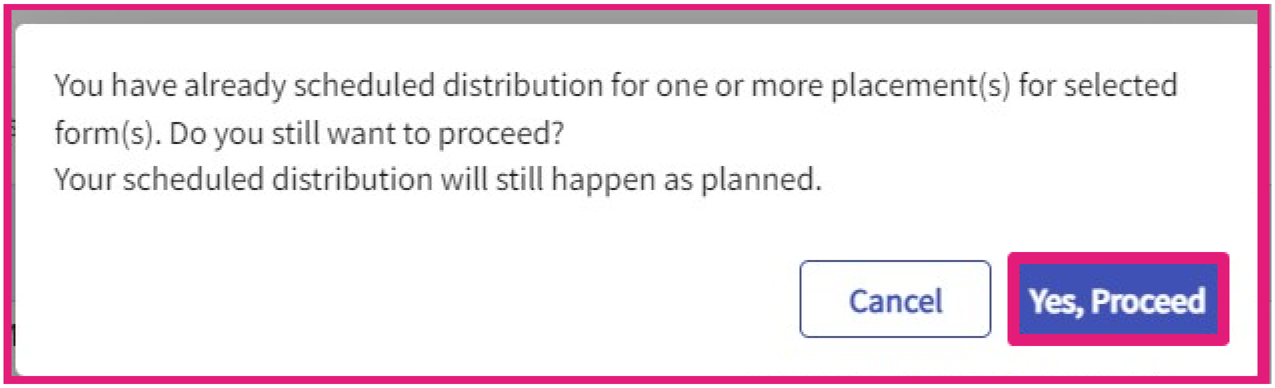


6. On the Distribute Form(s) window, you can view the selected form name. In the Select Primary Evaluator section, select the evaluator you want to send the forms to and click Continue.

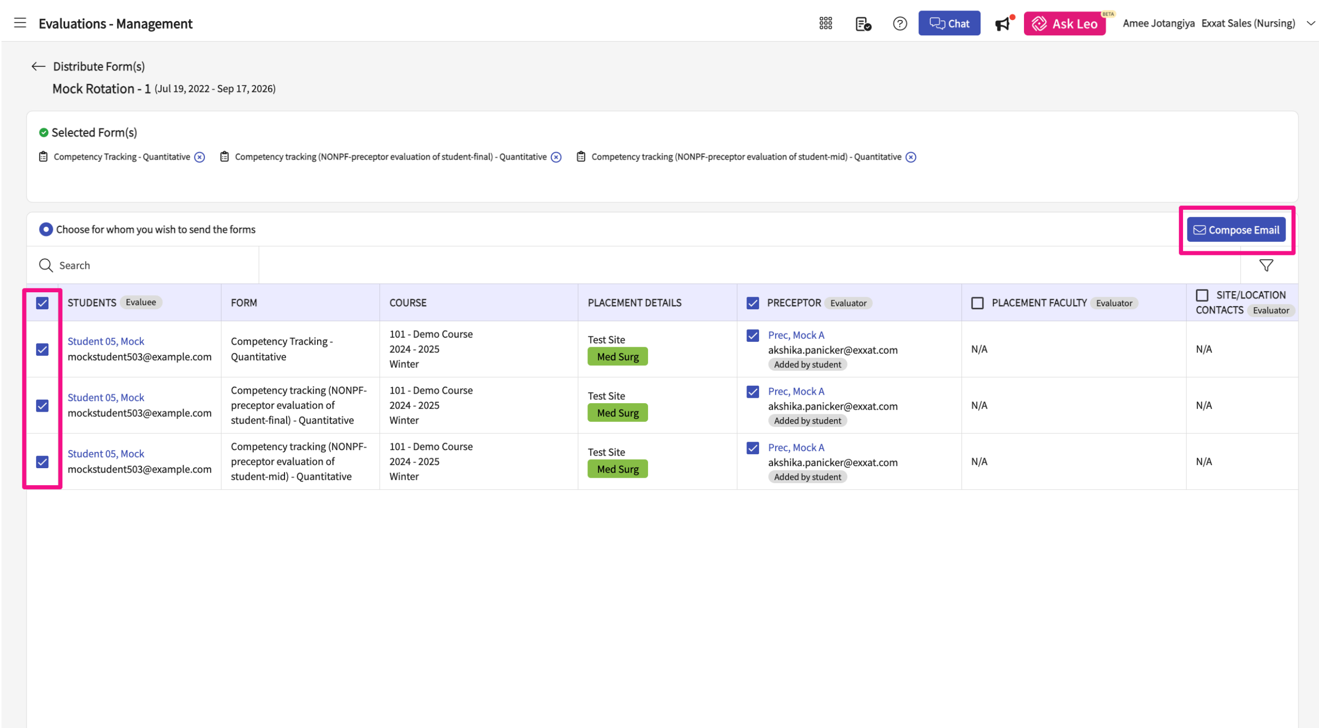


7. If the distribution is already scheduled, you can still continue to create another schedule for the same form. Click **Distribute**, and click **Yes, Proceed** to create multiple schedules. Select the

Primary Evaluator > Continue.

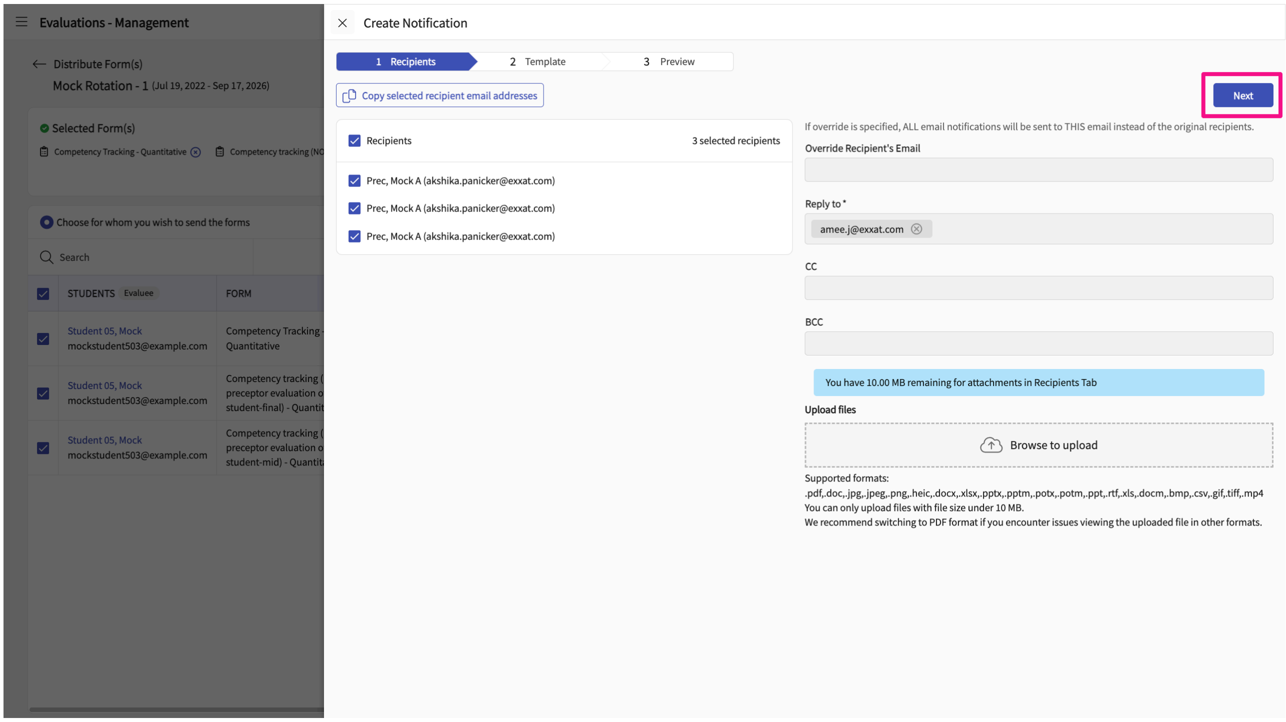


8. Select the recipient to whom you want to send the forms. Click filter icon to filter the evaluator list.



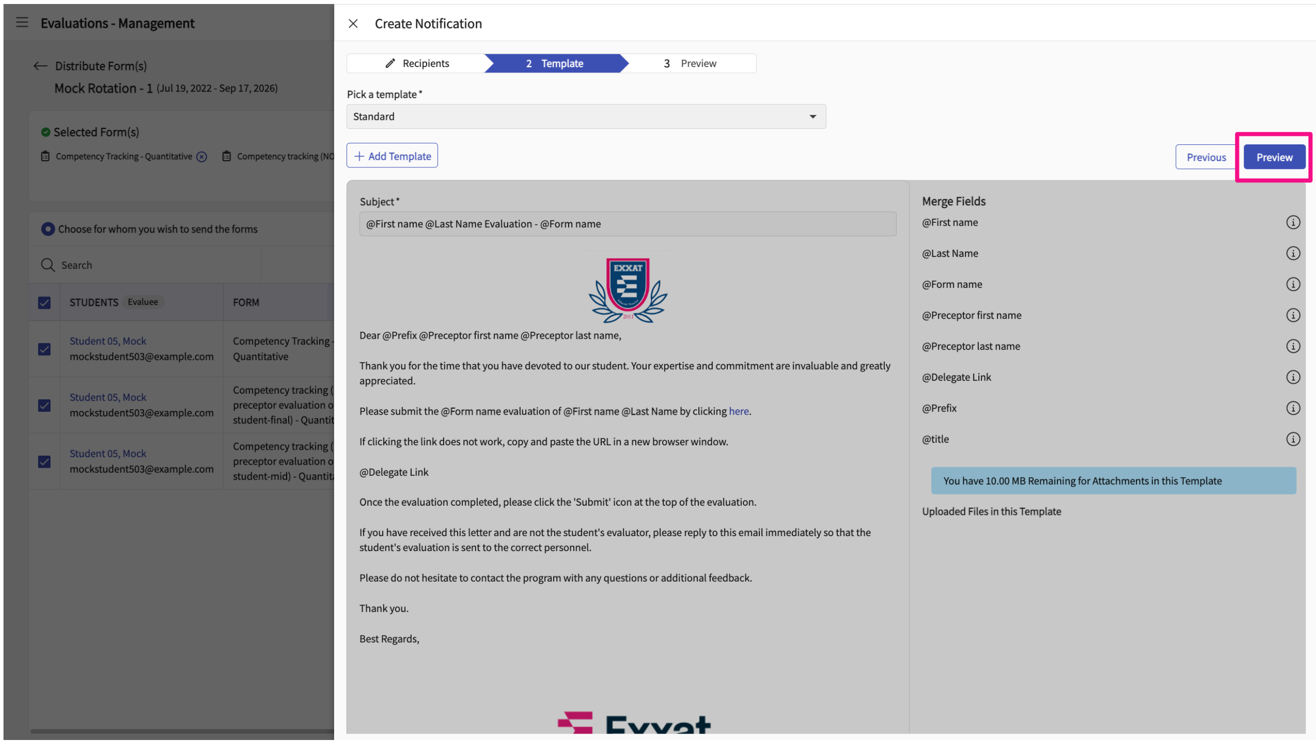
9. Click Compose Email.

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



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 recipents
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:



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.
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        1. Header and footer layout from the following
        2. Exxat logo on the footer
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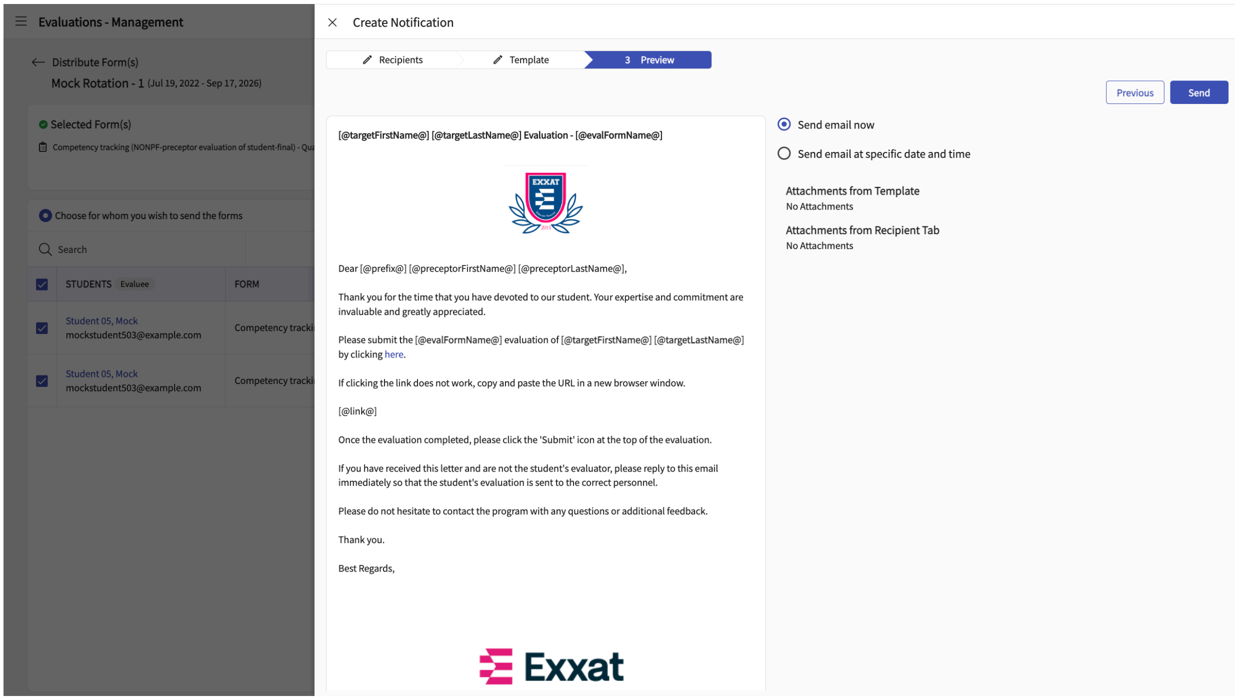
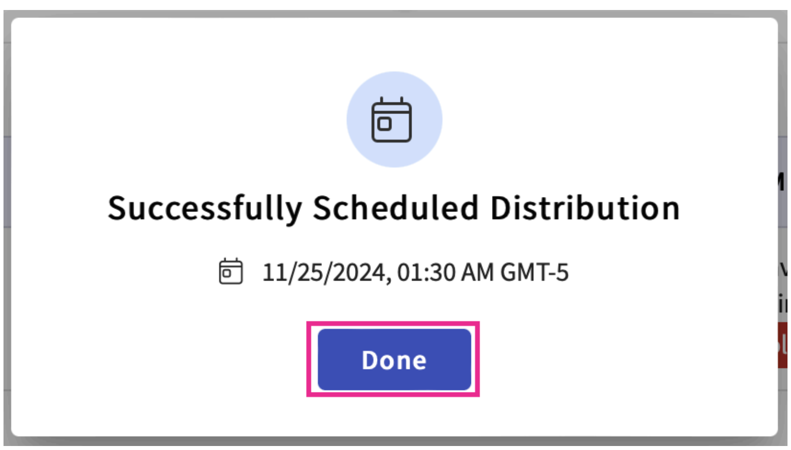
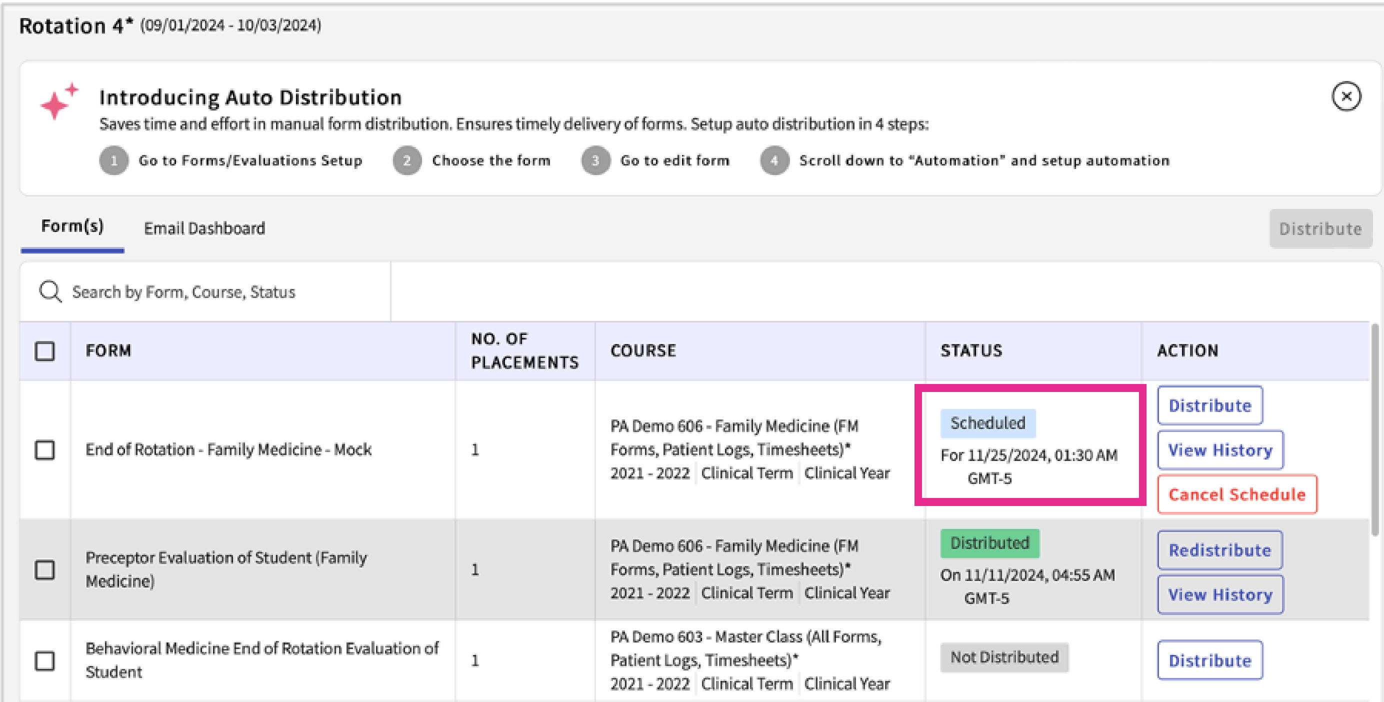
        5. University logo on the header and Exxat logo on the footer
4. Share Profile University logo on the header and Exxat logo on the footer.
5. In the Upload Files in this Template section, click Browse to upload to upload files in the template.
6. Click Save. The new template will be displayed in the Pick a Template drop-down menu.
7. On the Preview section, you can review your email and select one of the following:



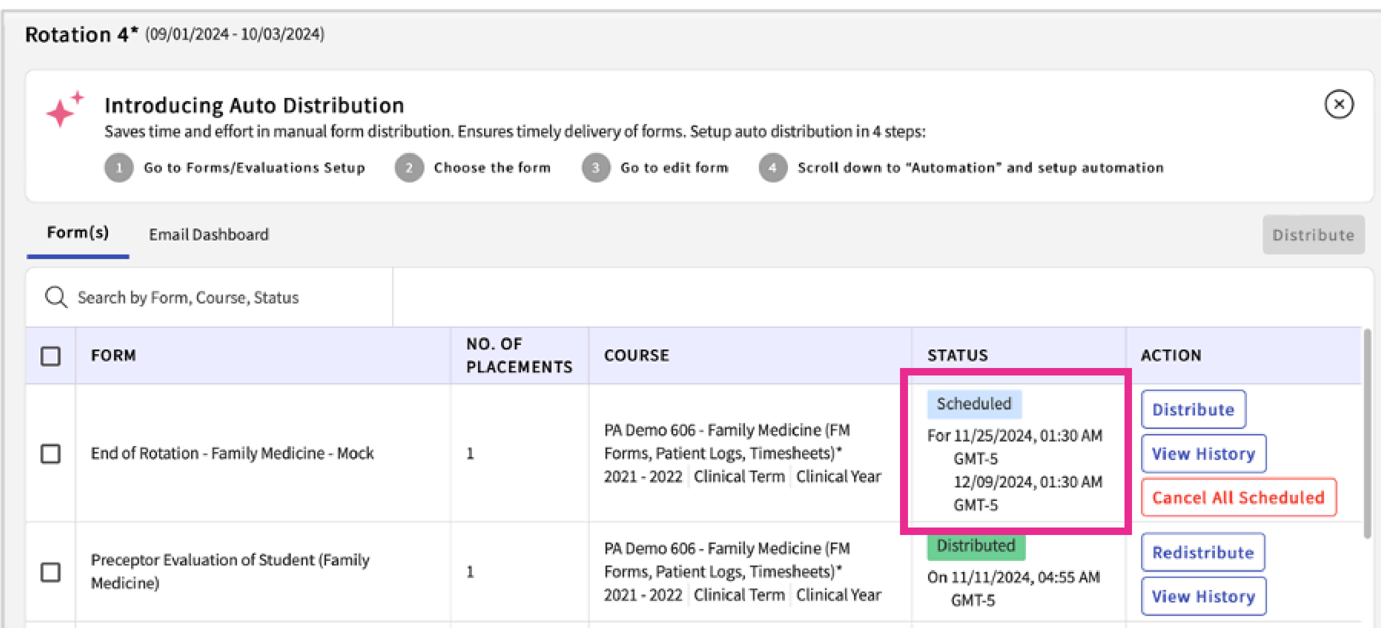
1. **Send email now** – if you select this option,
2. **Send email at specific date and time** – from the **Date Time** calendar select the date, month, year, and time to schedule the email.
3. Click **Send**.
4. Once you have scheduled the email, you would see a pop up window with the details of the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



12. You can schedule the distribution multiple times and select different recipients, by following the same steps from Redistribution and all the scheduled distributions will be listed on the distributions page.



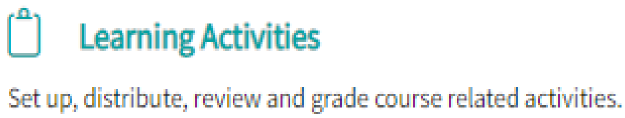
Auto Distribution of Evaluation

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

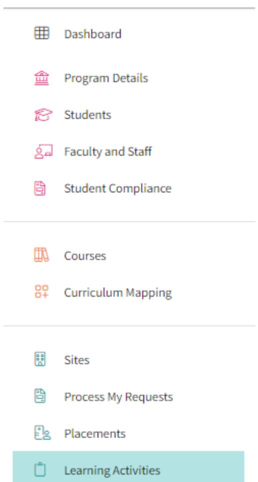
To set up Auto Distributions, perform the following steps:

1. Go to Dashboard and click Learning Activities.

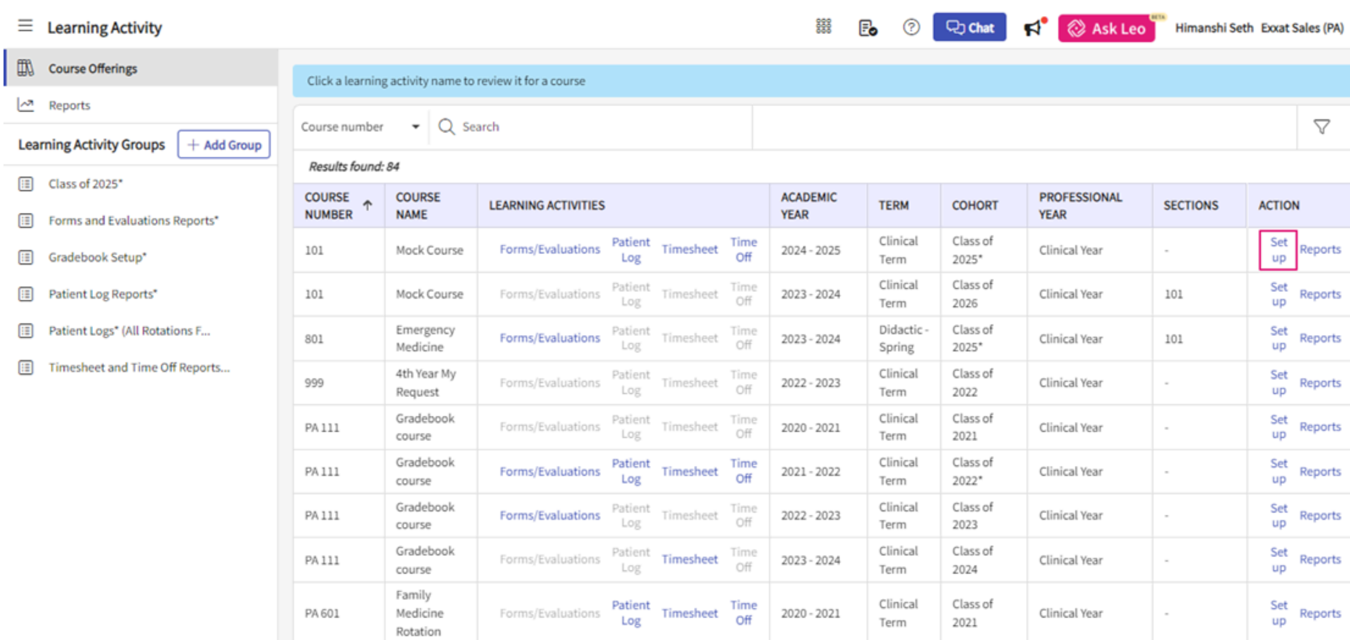


OR

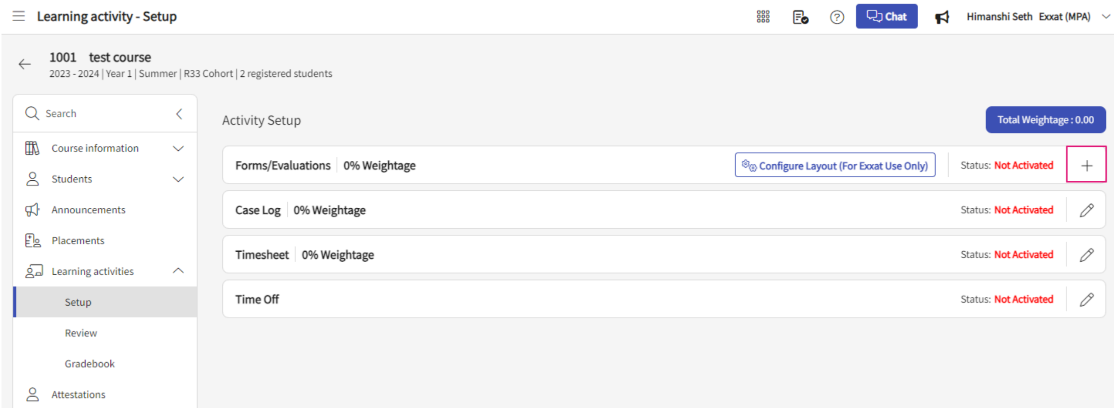
Go to the menu on the top left corner and click Learning Activities.



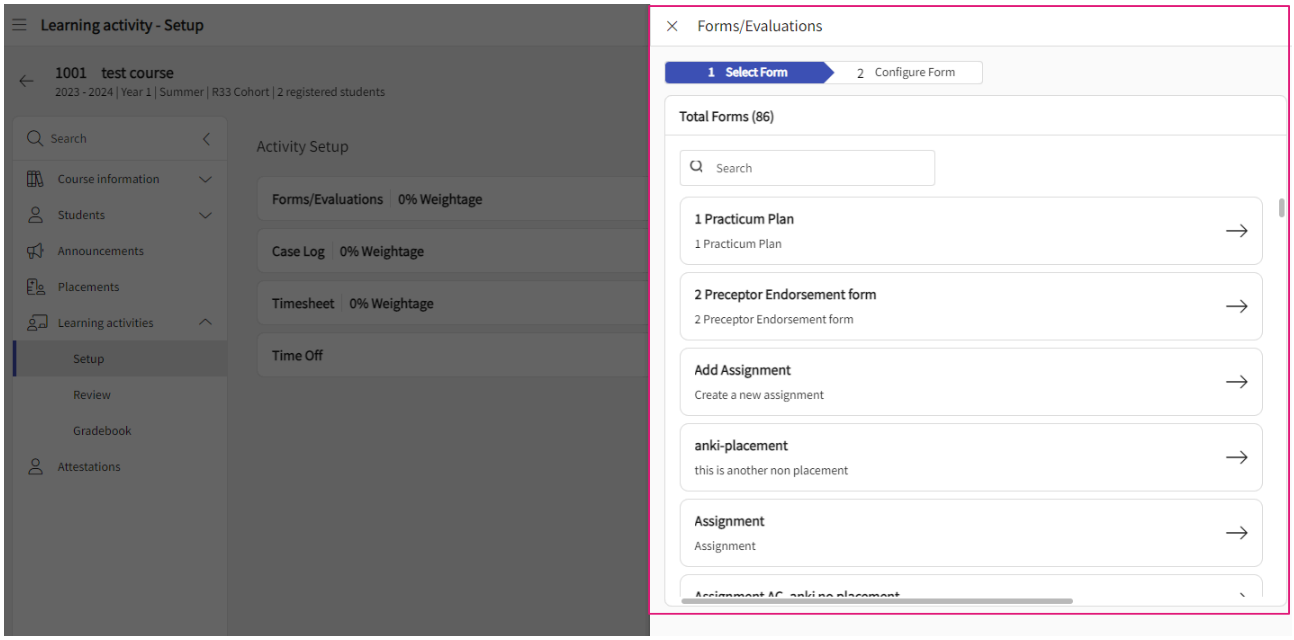
2. Click Setup under the Actions column for the required course.



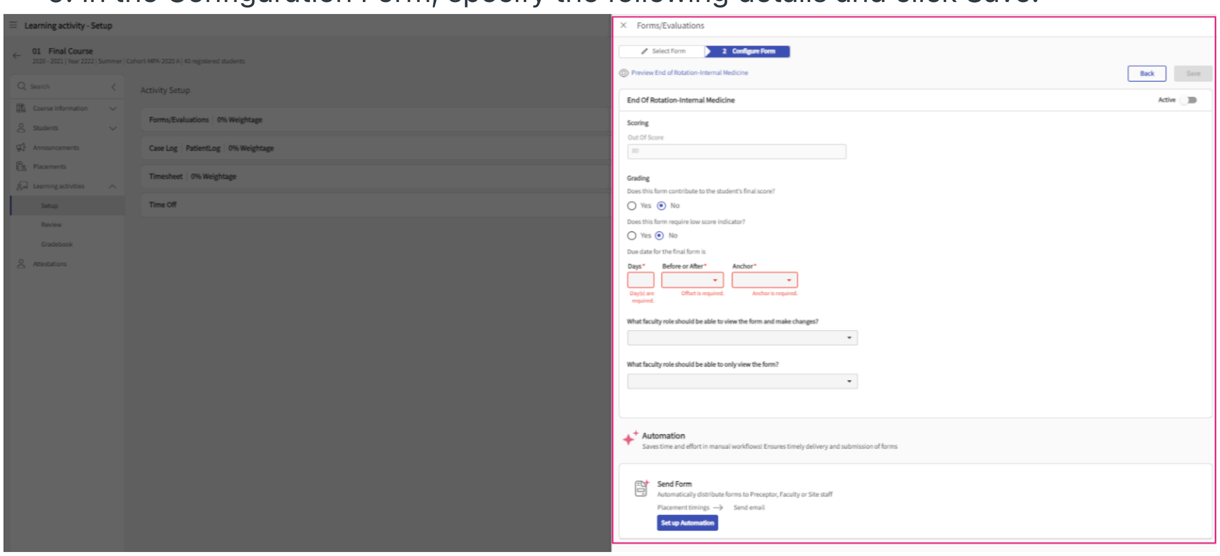
3. Click the add icon for the required course under the Actions column.



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

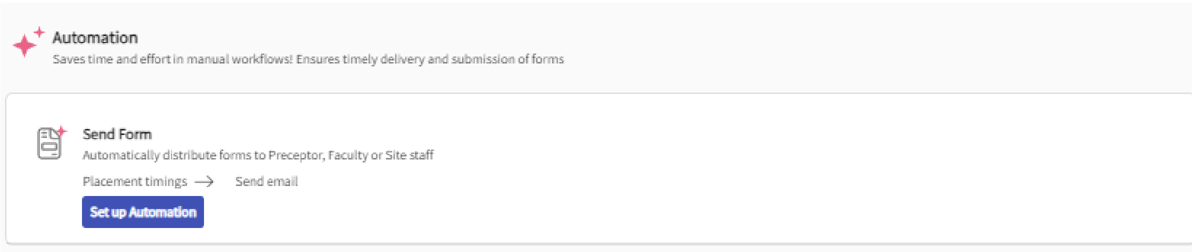


5. In the Configuration Form, specify the following details and click Save:



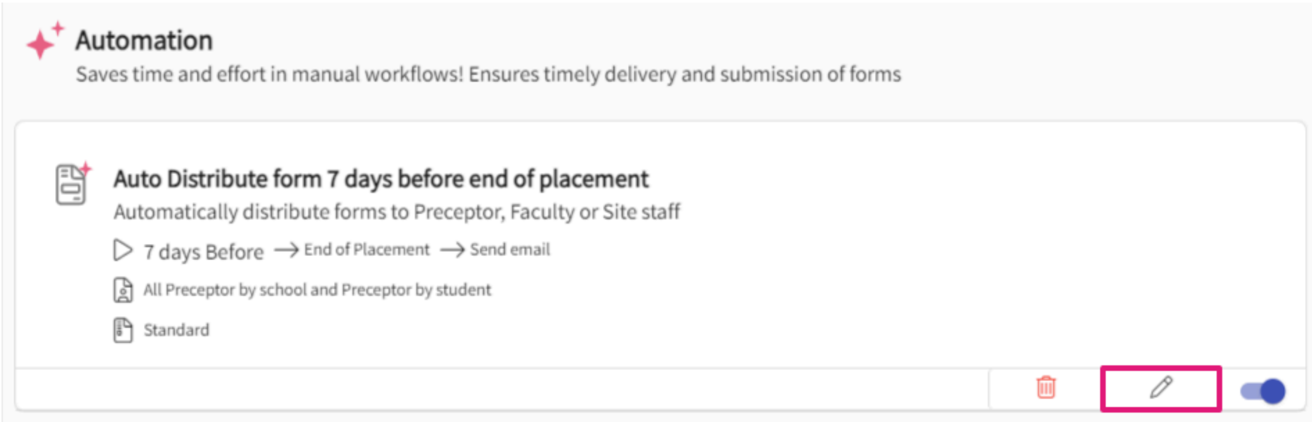
1. Grading: Select Yes or No as required.
   1. Does this form contribute to the student's final score?
   2. Does this form require low score indicator?
2. Publish Date for the Form: Sets the number of days before or after a specified anchor date when the form must be published.

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.

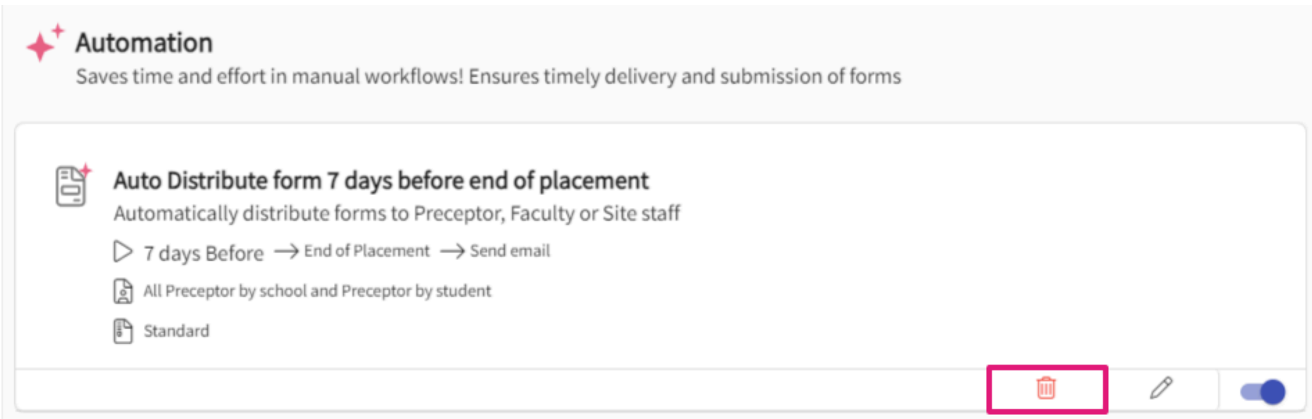


7. Specify the following information:
    1. When do you want to distribute forms?: Choose the timing for when the forms must be distributed for the placement period. Select Trigger: Choose the trigger point for form distribution.
        1. Beginning of Placement: Distribute forms at the start of the placement period.

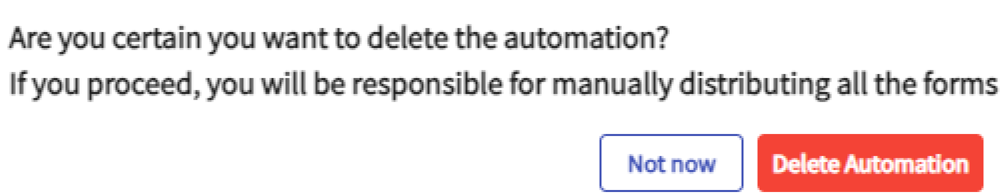
        2. Mid of Placement: Distribute forms halfway through the placement period.
        3. End of Placement: Distribute forms at the end of the placement period.
    2. Do you have a preferred distribution schedule?: Specify if you have a particular schedule for distributing the forms relative to the placement 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.



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



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.

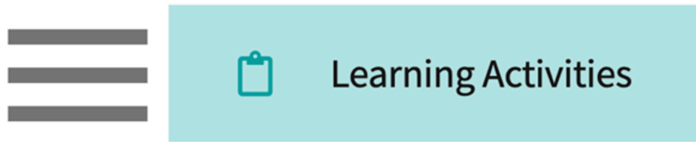


13. Once the Automation setup is completed you will be able to view the schedule distribution under Forms/Evaluation.

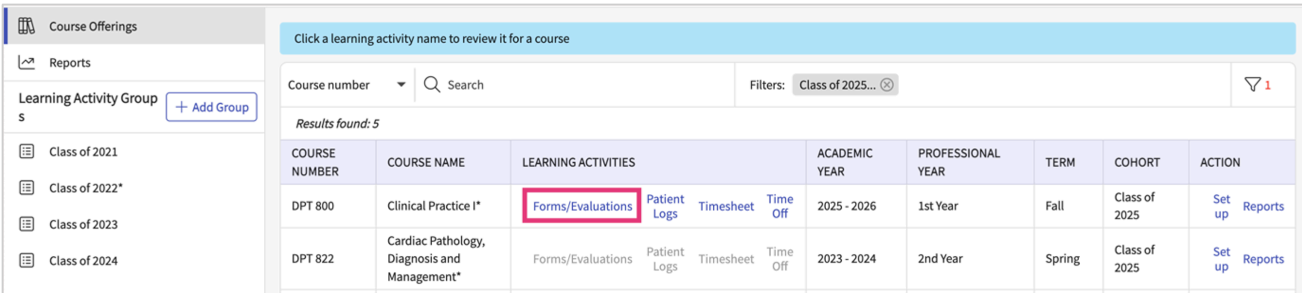
Reviewing Evaluations

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

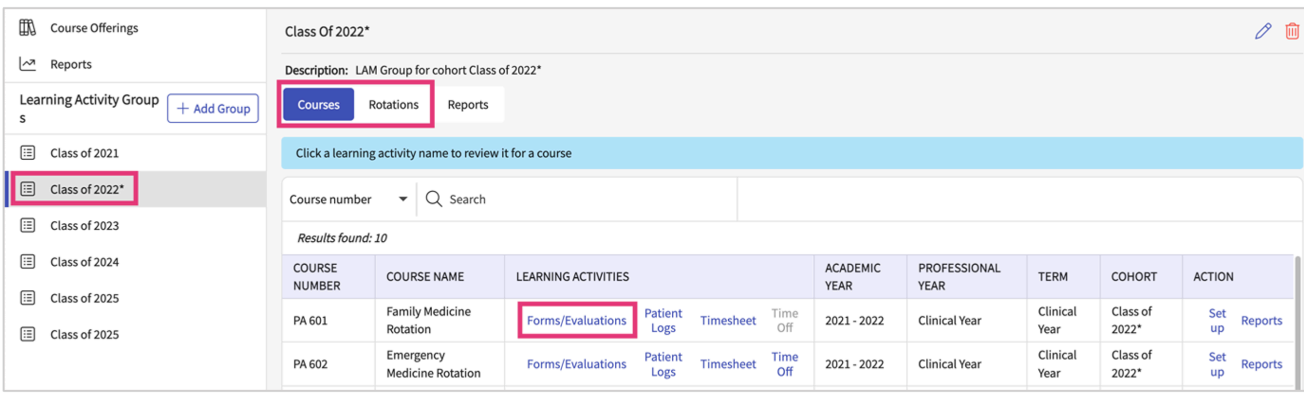
1. Select Learning Activities from the left menu or dashboard.



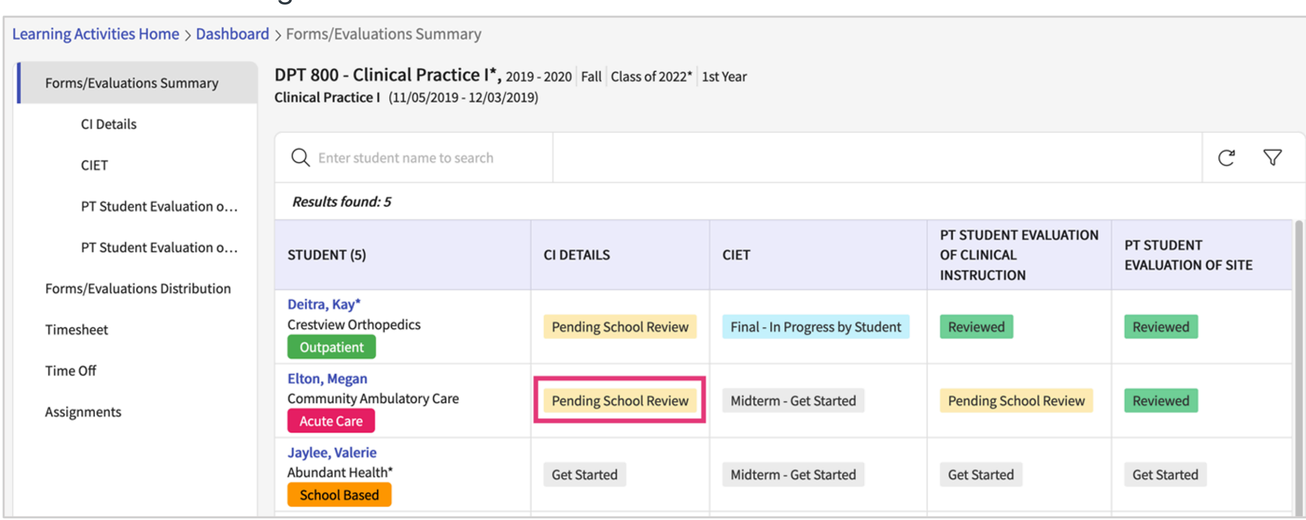
2. Select Forms/Evaluations for the desired course offering.



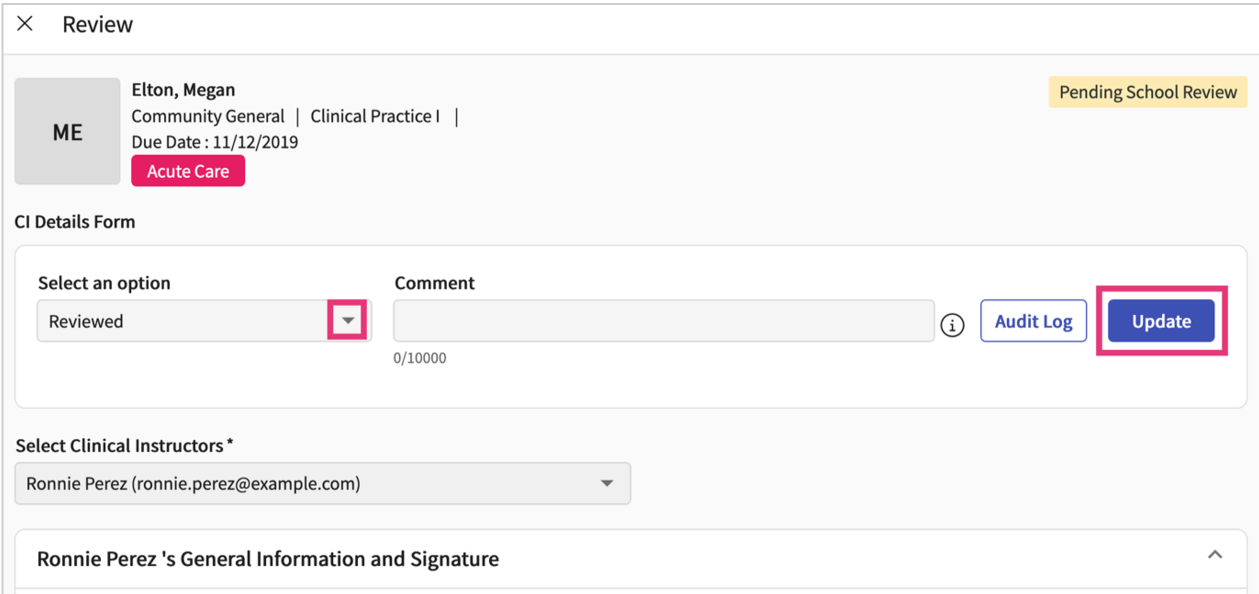
3. You can also find the course or rotation you'd like to review using the Learning Activity Groups, simply select your desired course or rotation.



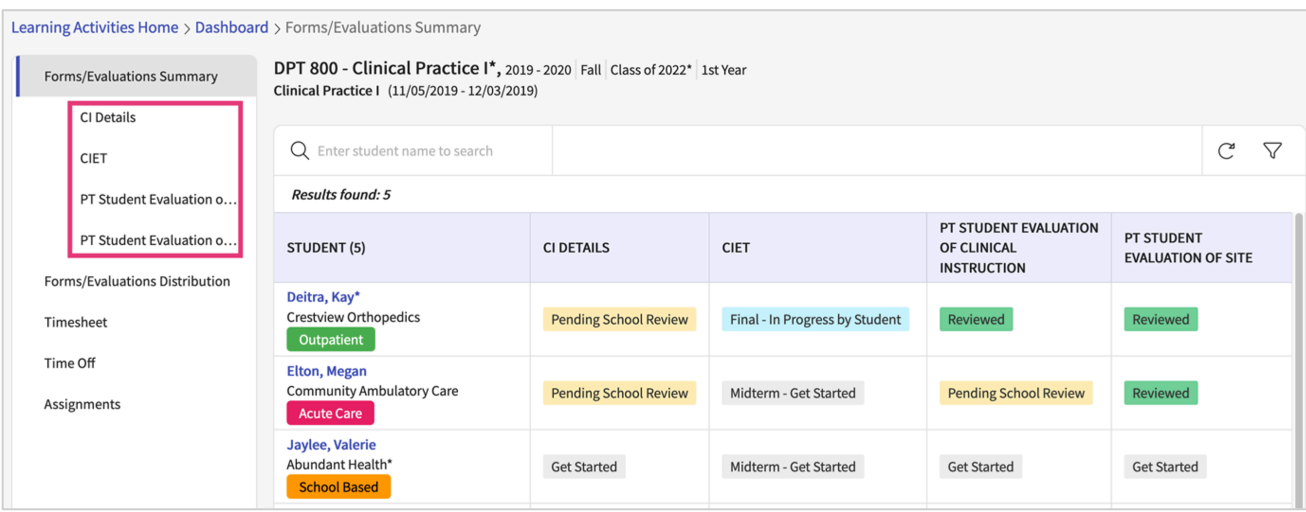
4. You'll be taken to the Forms/Evaluations Summary page, which will display all activated forms and evaluations along with their current status. Click on the status to view the form.



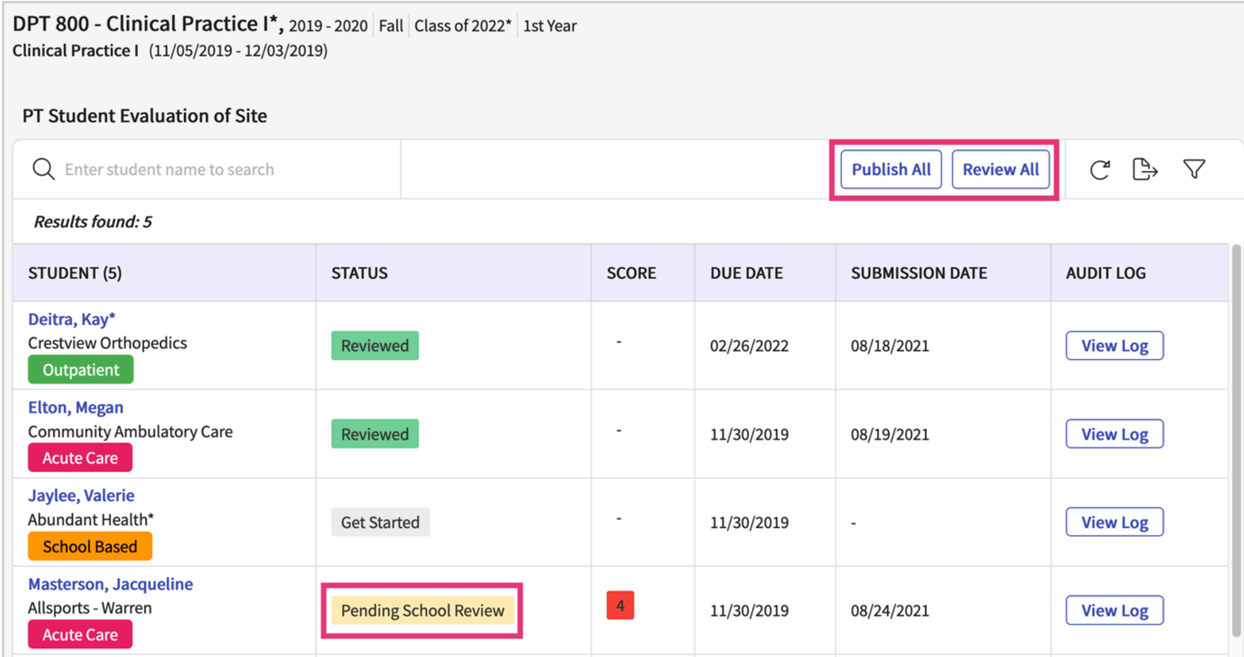
5. A drawer will open for you to review the form/evaluation. If you make any changes, make sure to click Update.
    1. If the form has a status of **Pending School Review**: you can mark the form as reviewed, or un-submit the form for the student or site to make further edits.
    2. If the form has a status of **In Progress by Student/Site**: you can clear the form, save any changes, or submit on their behalf.



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



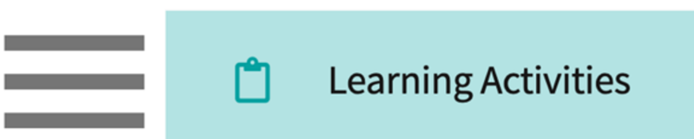
7. The page will load all the students along with the status of the form.
    1. Click Review All to mark all forms as reviewed.
    2. If your form has a feature enabled to display completed forms on the location profile, click Publish All. You can also publish forms individually.



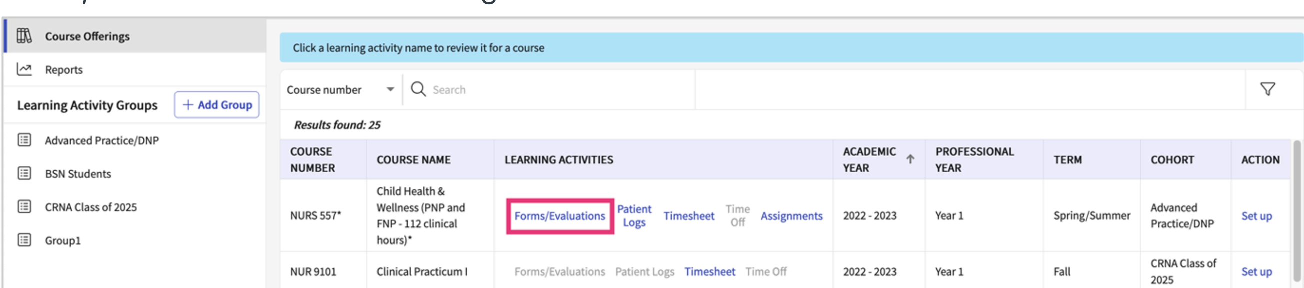
Completing Evaluation

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

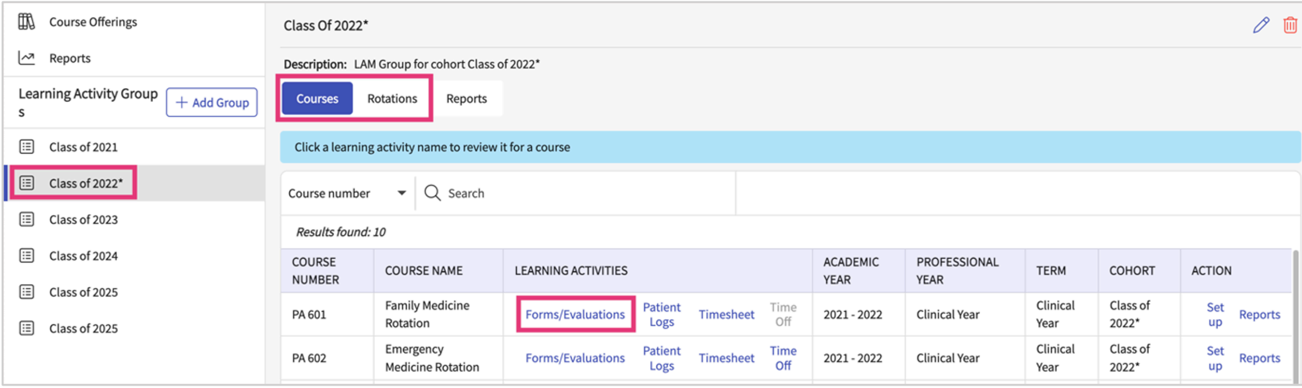
1. Select Learning Activities from the left menu or dashboard.



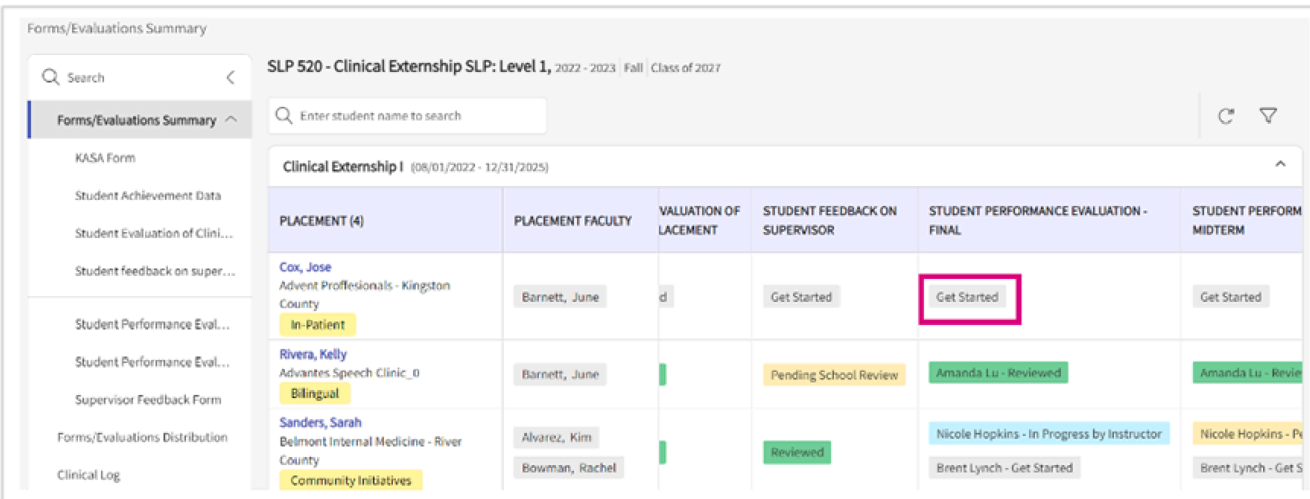
2. Find and select the course for which you'd like to fill the evaluations for. Select Forms/Evaluations from the Learning Activities column.



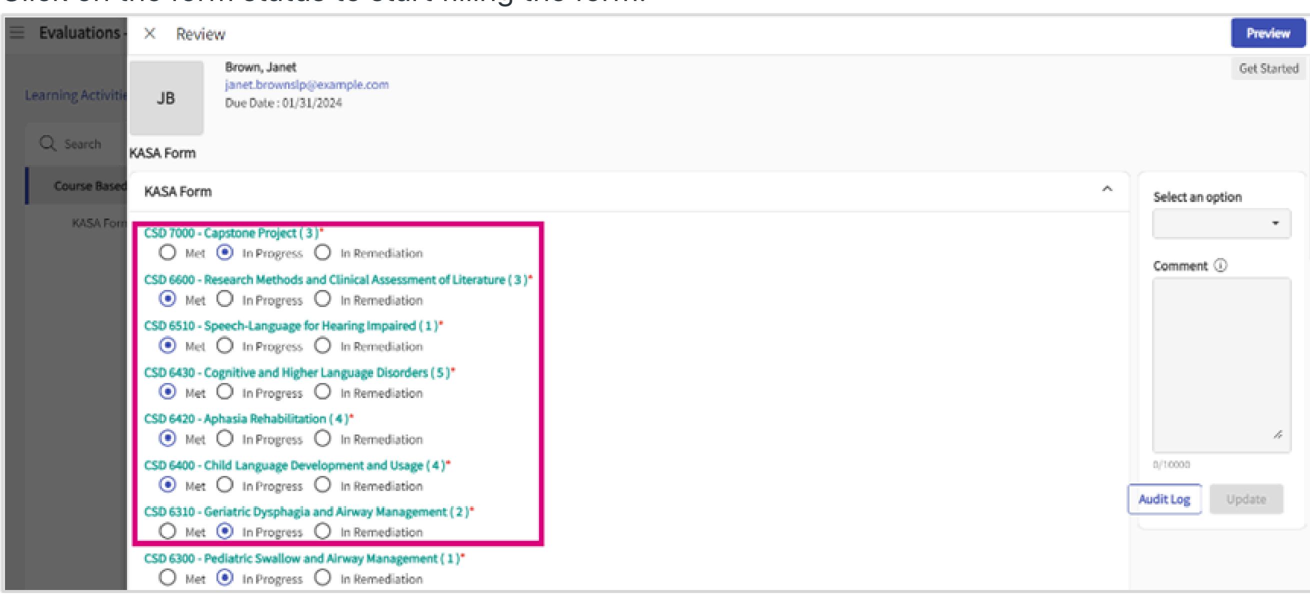
3. You can also find the course or rotation you'd like to review using the Learning Activity Groups, simply select your desired course or rotation.



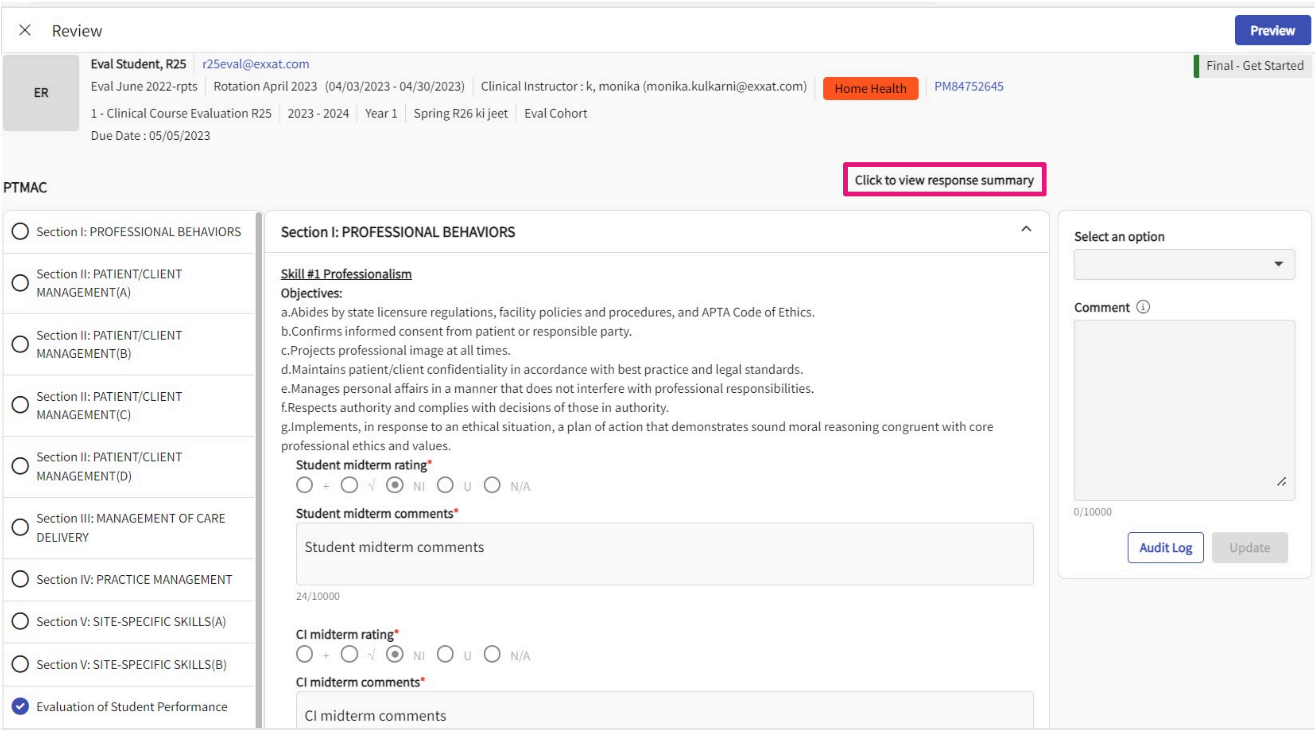
4. You'll be taken to the Forms/Evaluations Summary page, which will display all activated forms and evaluations along with their current status.



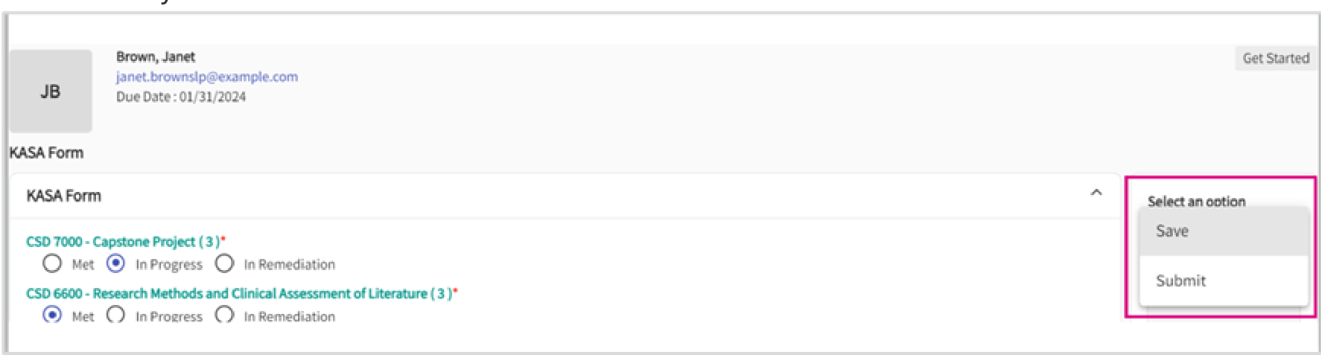
5. Click on the form status to start filling the form.



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.



7. Once done you can Save or Submit.



Reports

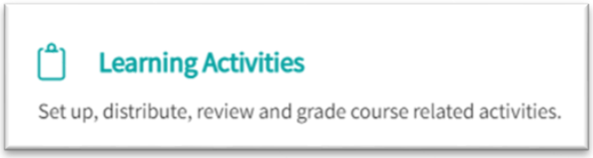
Graphical Report for Evaluation forms

The graphical reports for evaluations are only activated for PA discipline

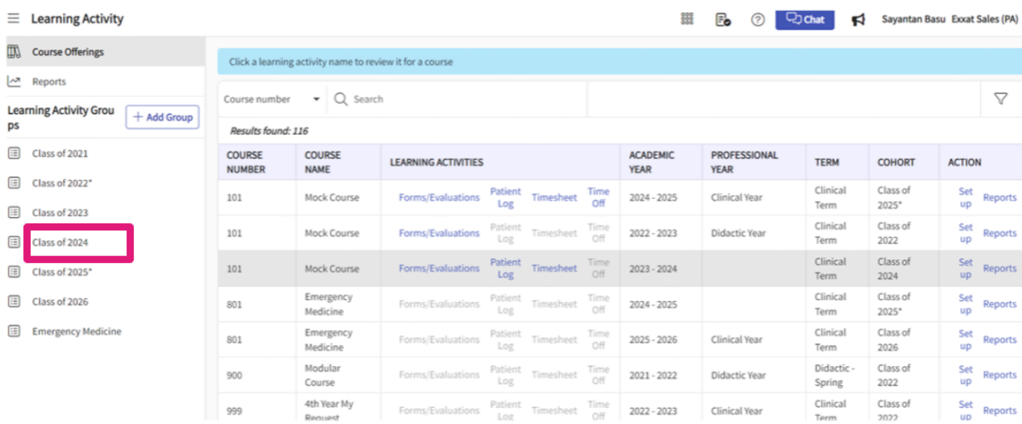
- Graphical Report for Non-Placement Forms
- Graphical Report for Placement Forms

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.

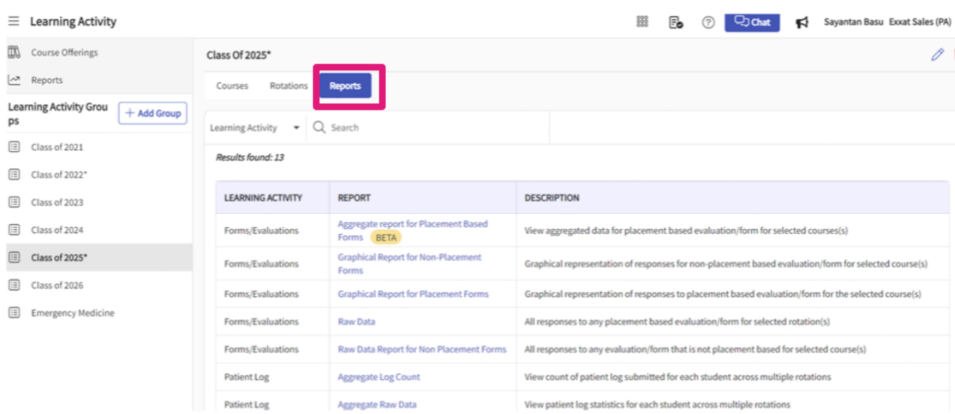
1. Select Learning Activities from your dashboard or left menu.



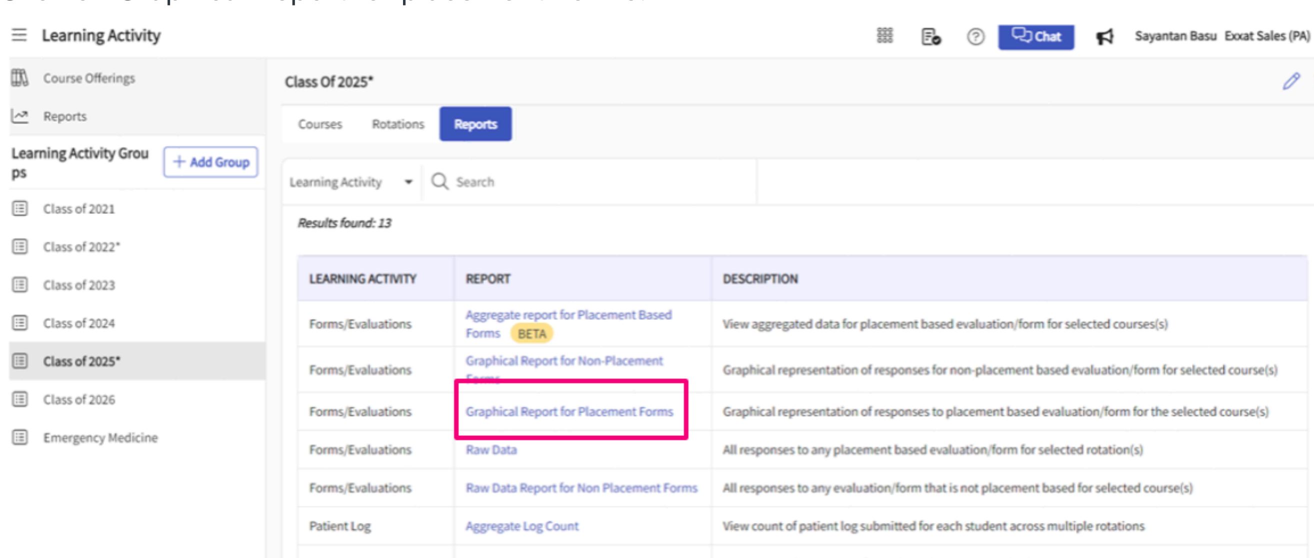
2. Select the learning activity group that you have created and would like to manage from the left side menu.



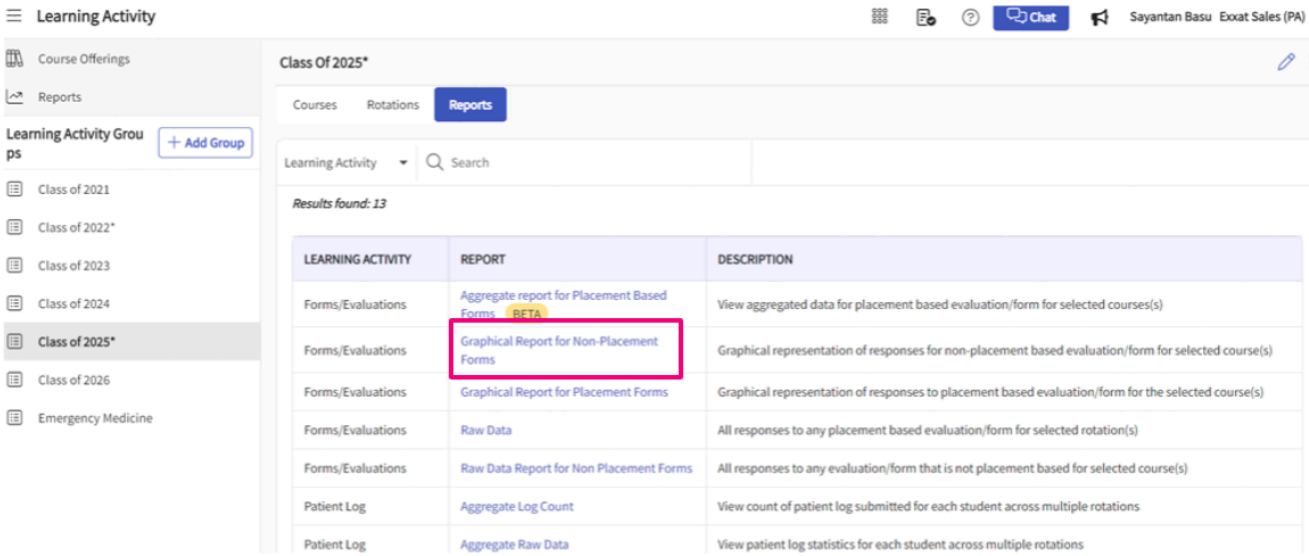
3. Click on the Reports tab.



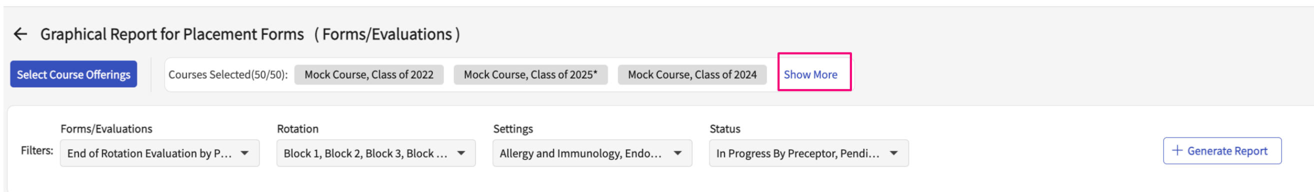
4. On this screen all the available reports for learning activities (Forms/Evaluations, Patient Log, Timesheet and Timeoff) are listed.
5. Click on Graphical Report for placement Forms.



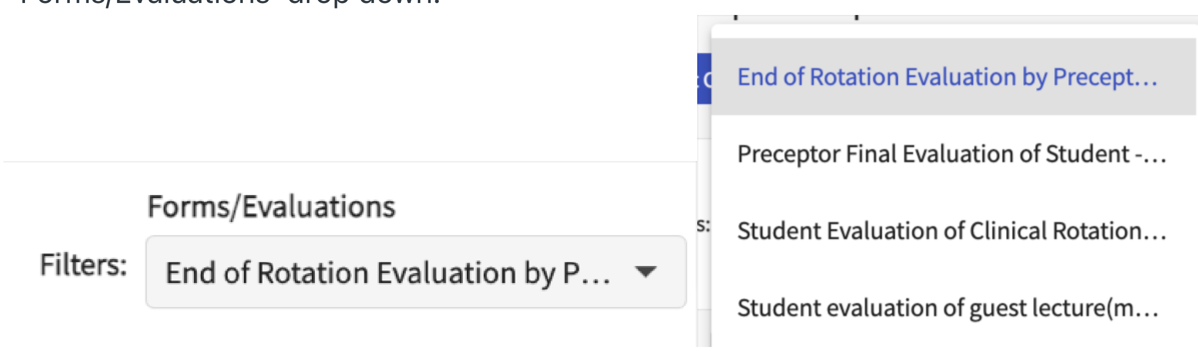
6. Click on Graphical Report for non-placement Forms.



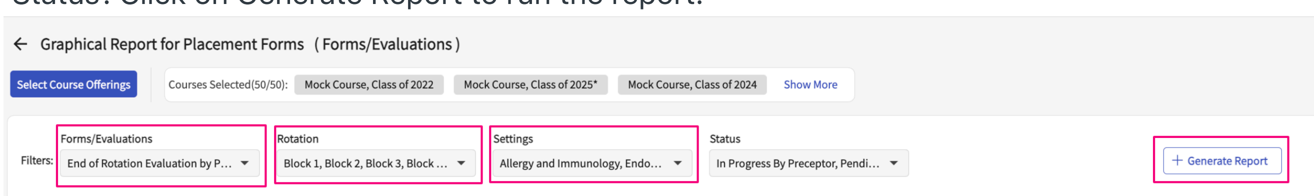
7. On this screen, all the course offerings will remain selected by default. You can choose to exclude them by clicking on 'Show More'. Then select the form from the



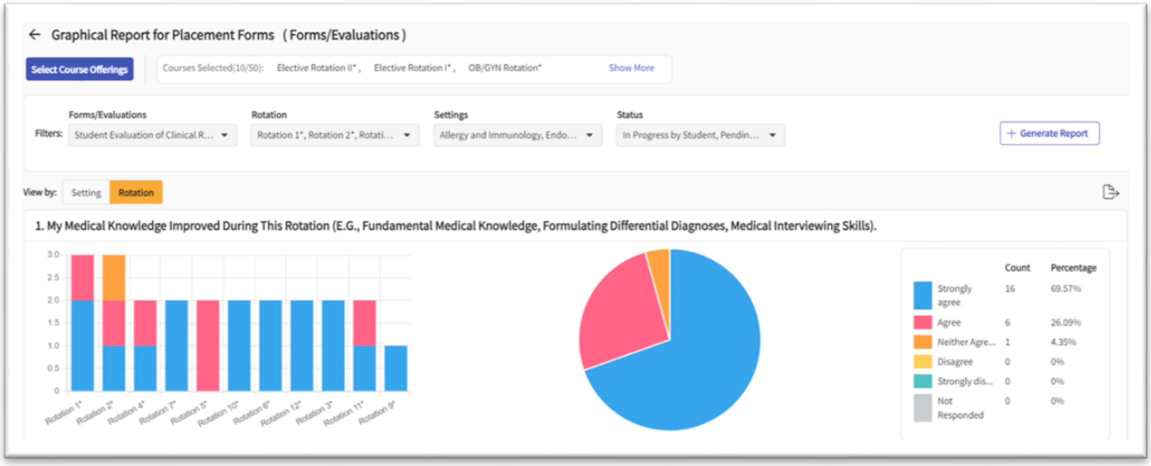
8. 'Forms/Evaluations' drop down.



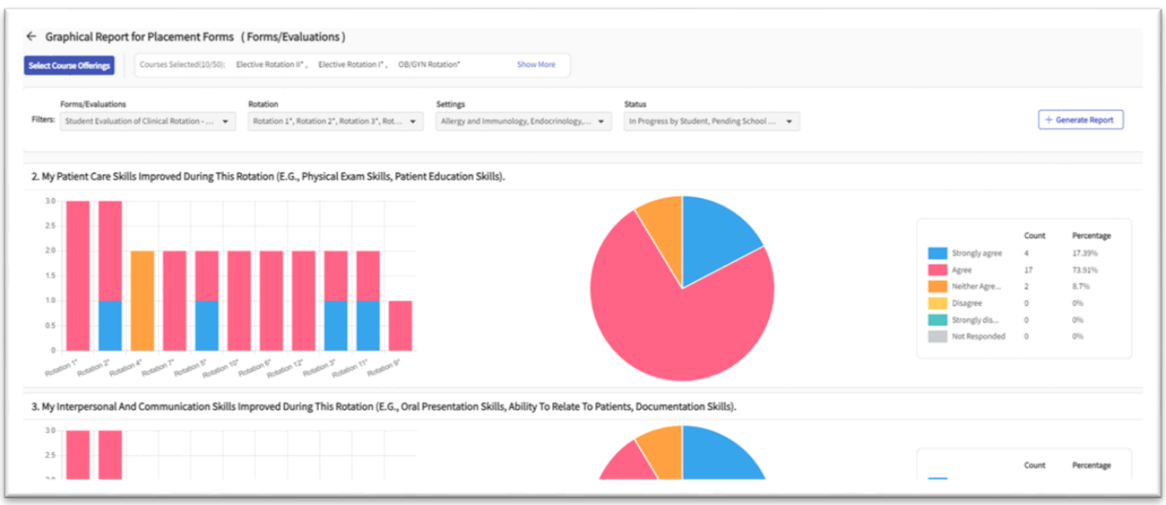
9. Select the relevant 'Rotation' and 'Settings' that you are looking for. Lastly select the relevant 'Status'. Click on Generate Report to run the report.



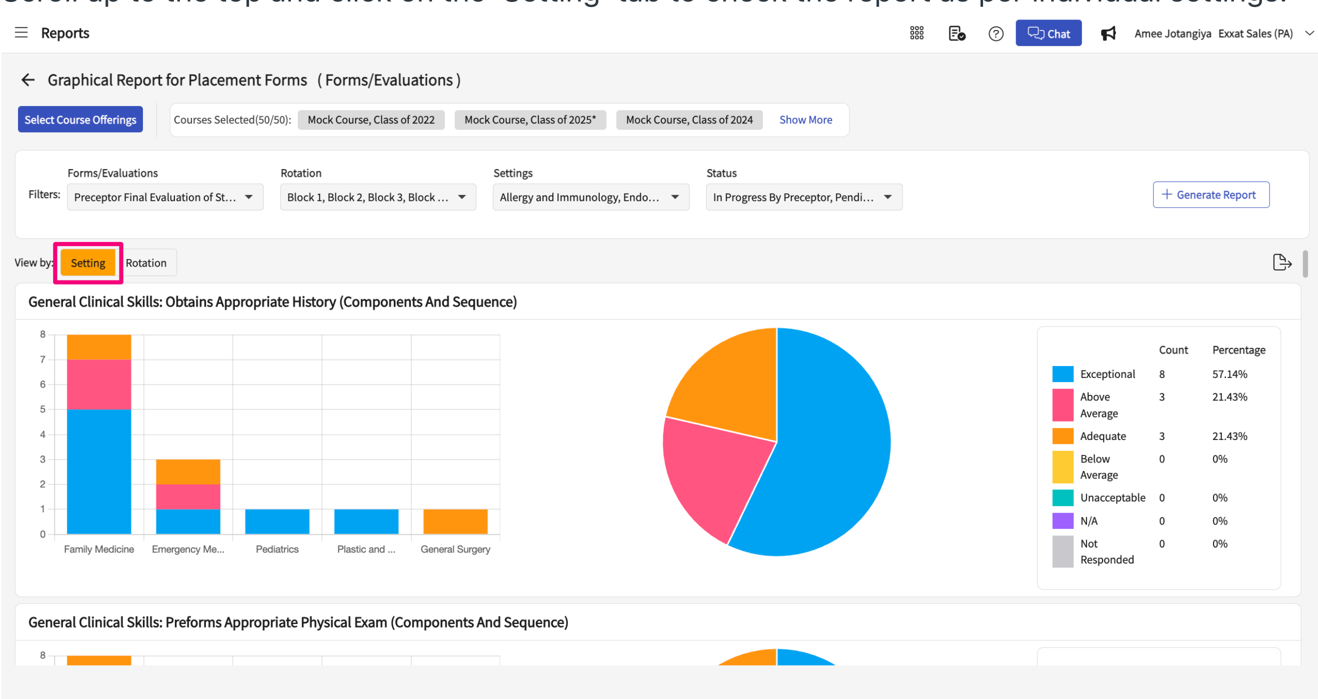
10. The system will show the data in a graphical format as per the questions mentioned in the form.



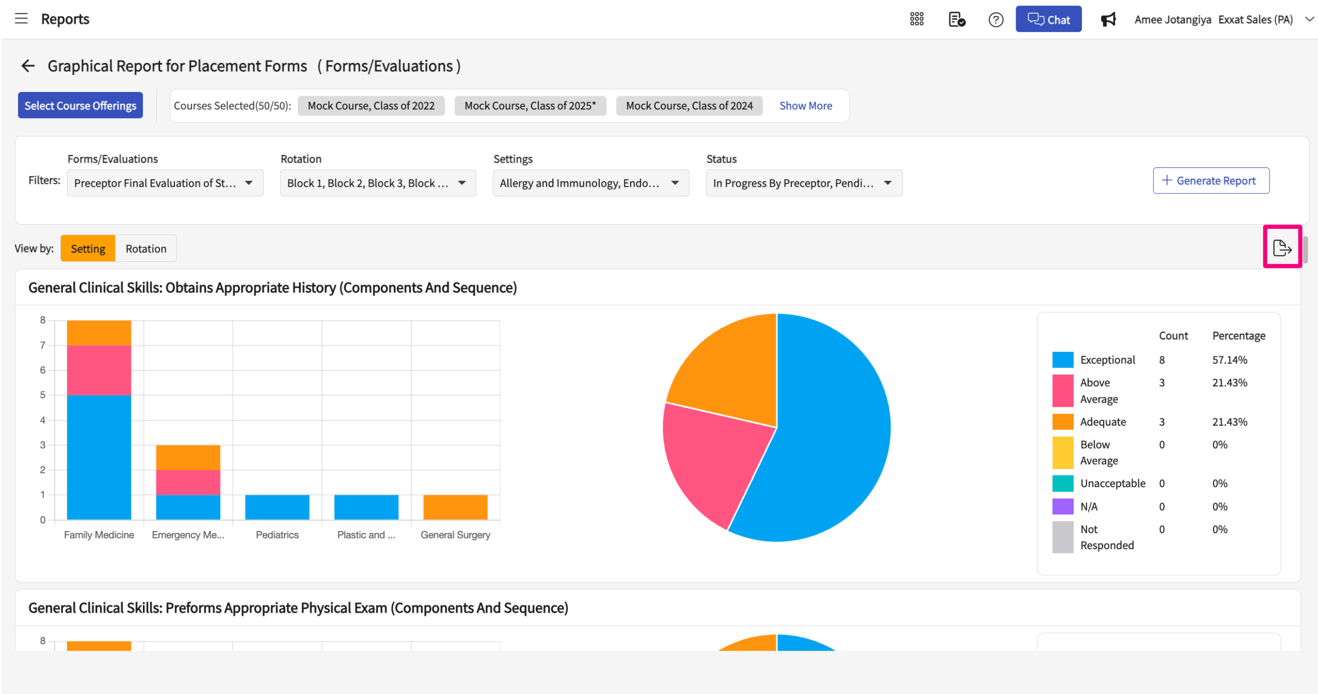
11. When you scroll down from the right scroll bar in the page, you will be able to see the graphical data for the next & remaining questions.



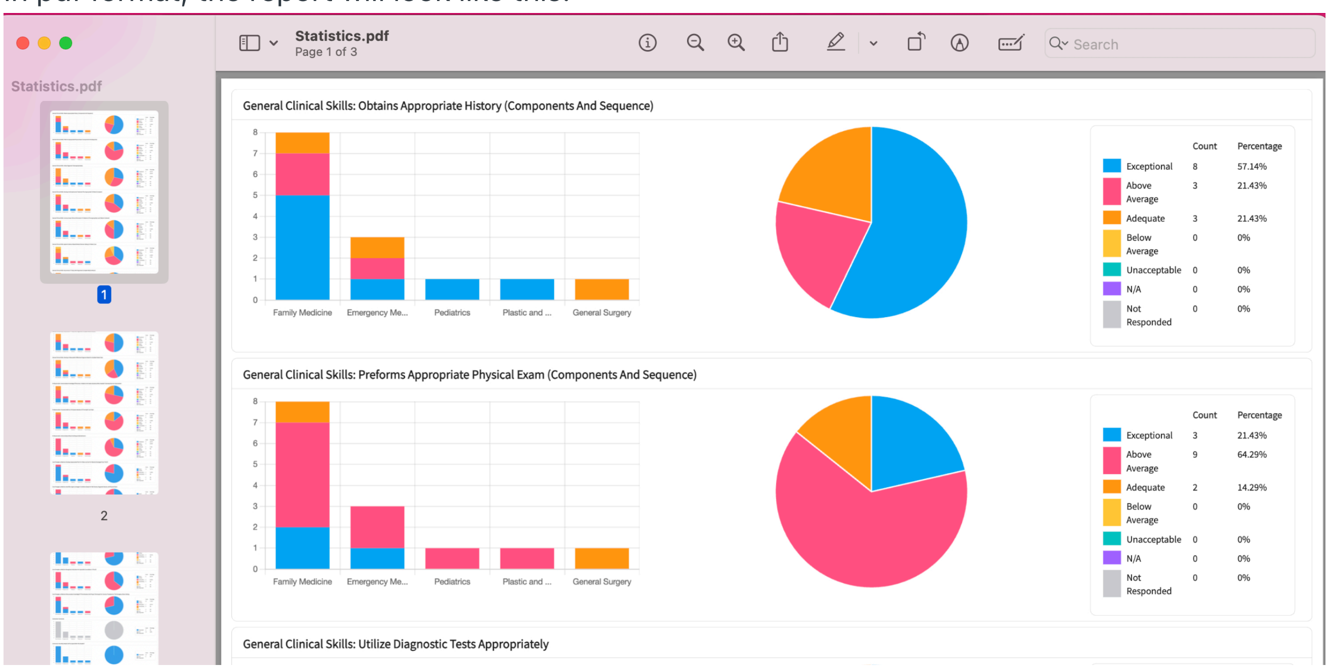
12. Scroll up to the top and click on the 'Setting' tab to check the report as per individual settings.



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



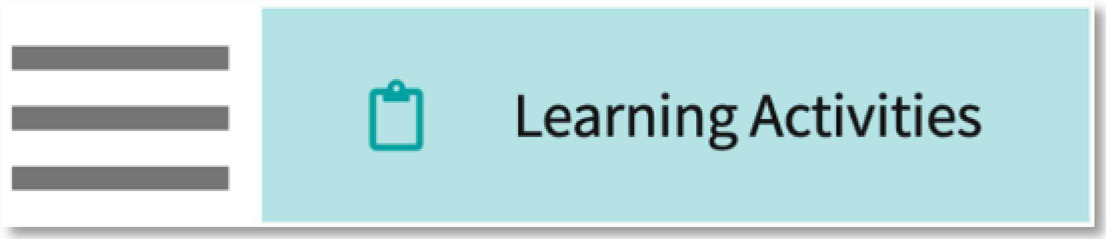
14. In pdf format, the report will look like this.



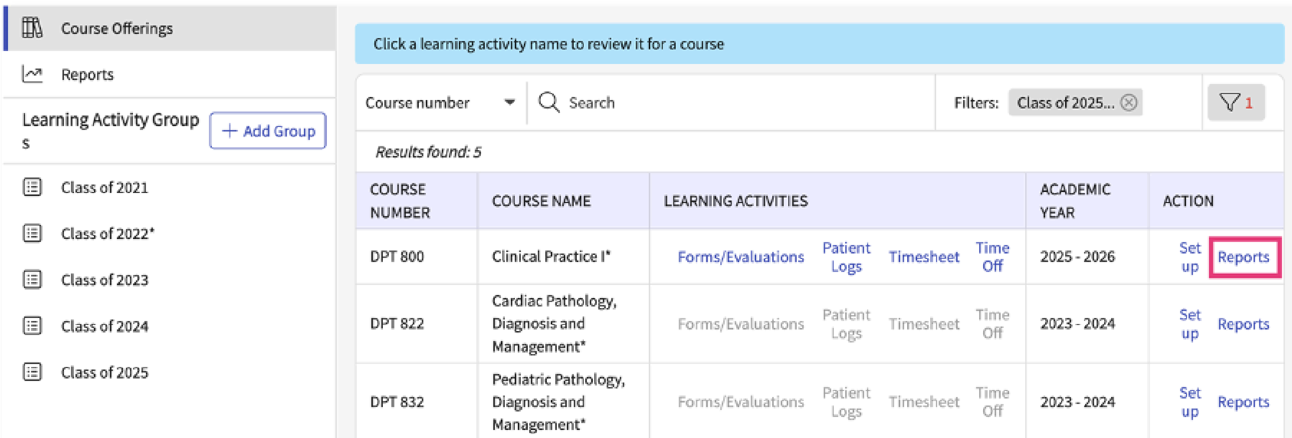
Viewing Aggregate Reports For Scored Evaluations

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

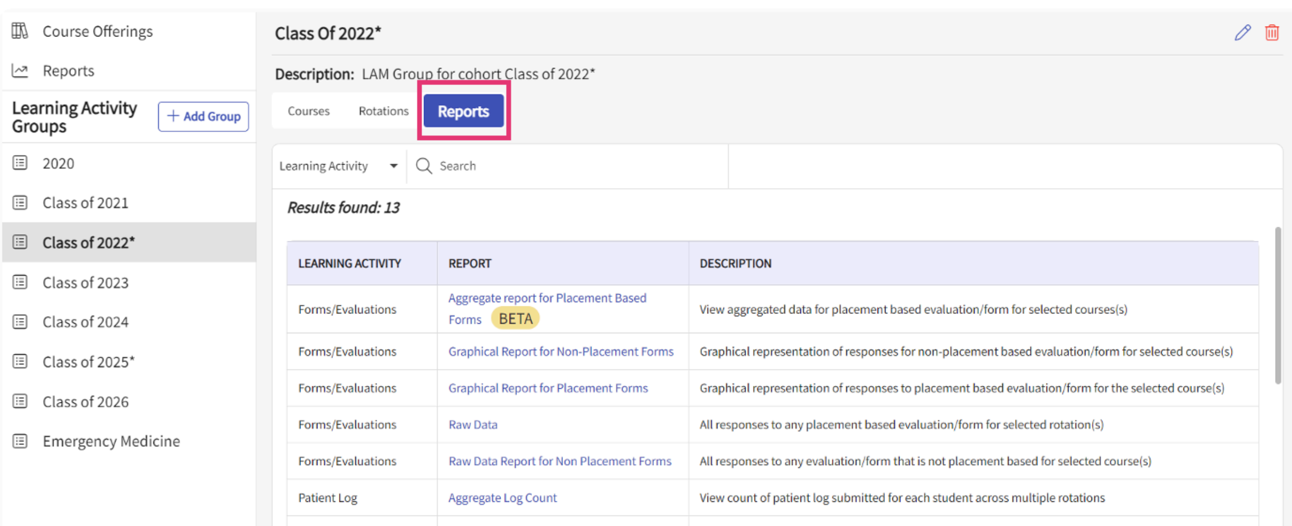
1. Select Learning Activities from your dashboard or left menu.



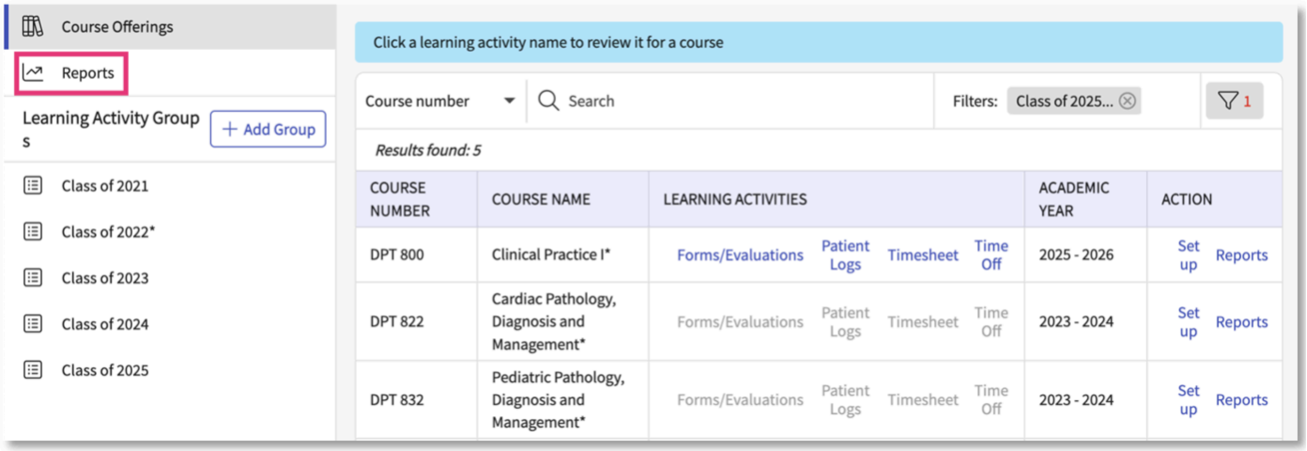
2. You’ll have three different options when it comes to reports, select the option that best fits your needs!
3. Select Reports for an individual course if you would like to focus on one course only. The reports list will automatically filter by the selected course.



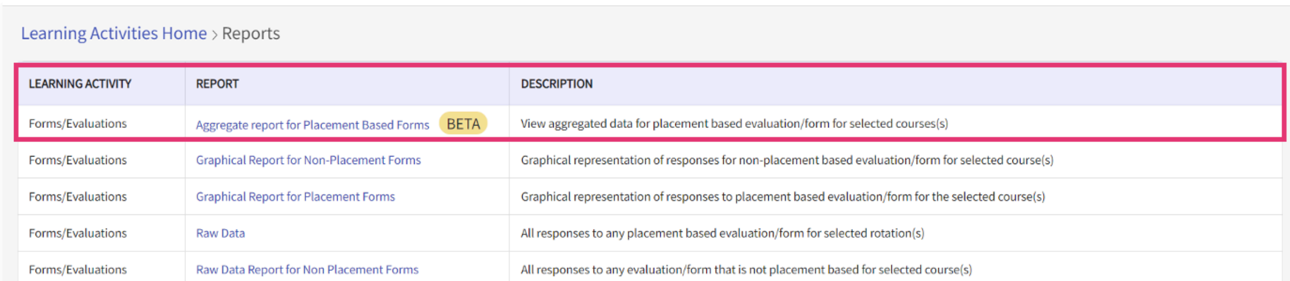
4. Select a learning activity group and click on the Reports tab. The reports list will automatically filter by the courses bundled in the learning activity group.



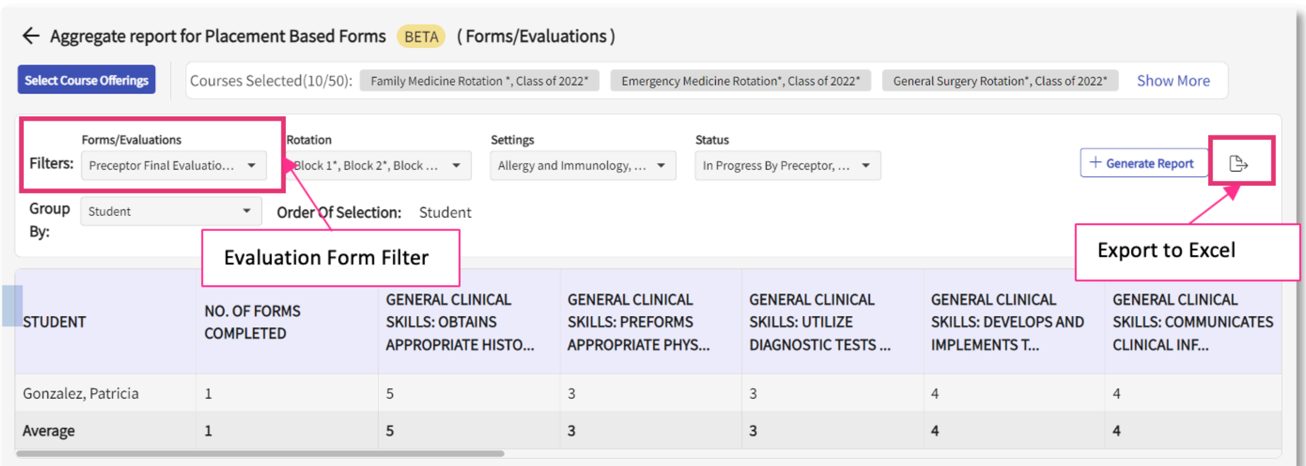
5. If you would like to instead view reports and filter by any other grouping, select Reports from the left panel.



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

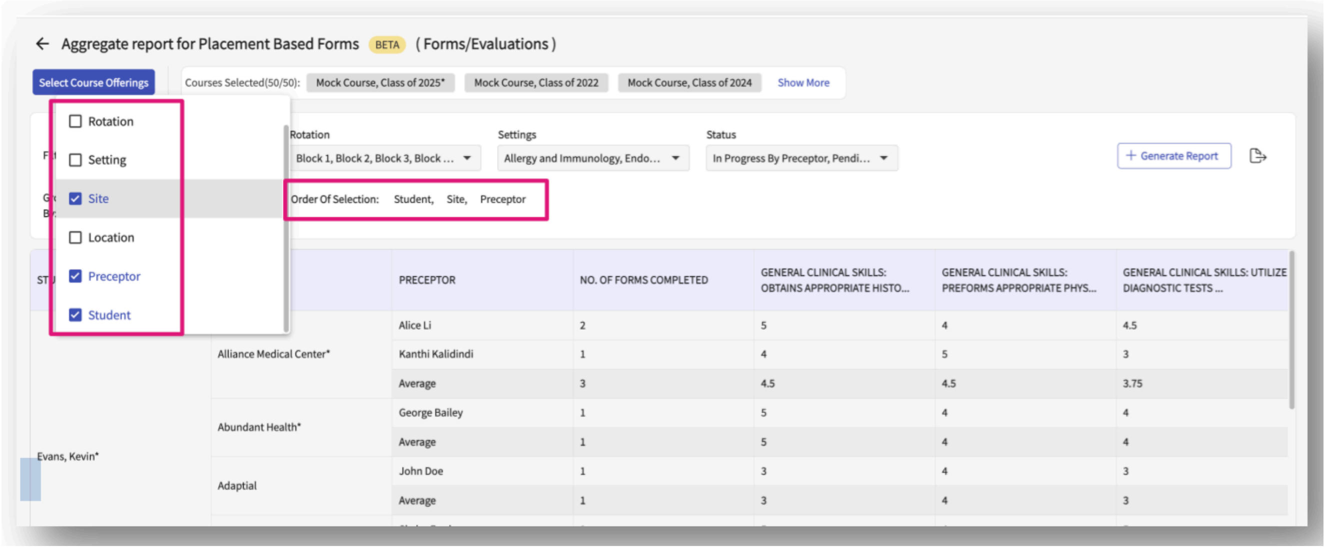


7. You'll find common features among the reports available. Below are a few samples:

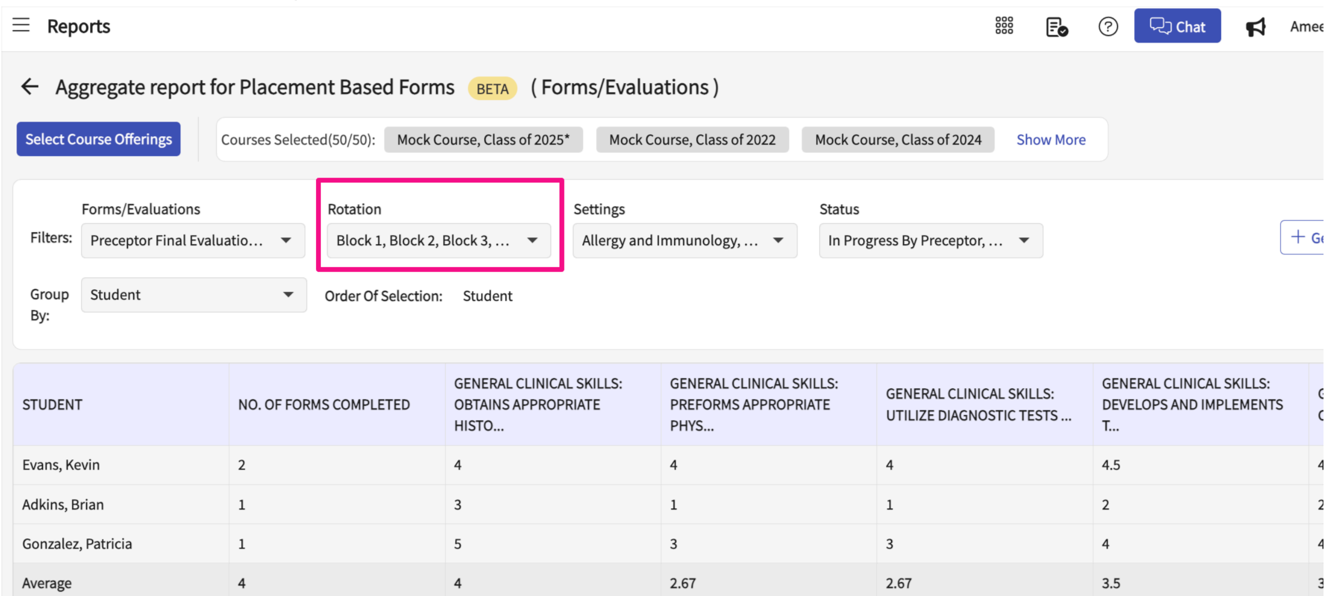


8. When working with Aggregate Reports for Scored Evaluations, the school can choose to categorize the data according to student, preceptor, location, site, setting, rotation, and course.

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



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



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
1	Site	Preceptor	Rotation	Rotation Start Date	Rotation End Date	Setting	Course	Course Code	Location	No. of Forms compl	General Clinical Skills: Obtains appropri	General Clinical Skill
2	Alliance Medical Center*	Alice Li	Rotation 4*	9/1/23	12/31/25	Pediatrics	Pediatrics Rotatior	PA 604	Alliance Medical Cei	1	5	4
3	**Alliance Medical Center***	**Alice Li**	**Rotation 4***	**9/1/23**	**12/31/25**	**Pediatrics**	**Pediatrics Rotatior**	**PA 604**	**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 Medici	Gradebook course	PA 111	Alliance Medical Cei	1	4	5
7	**Alliance Medical Center***	**Alice Li**	**Rotation 10***	**7/1/23**	**12/31/25**	**Emergency Medic**	**Gradebook course**	**PA 111**	**Average**	**1**	**4**	**5**
8	**Alliance Medical Center***	**Alice Li**	**Rotation 10***	**7/1/23**	**12/31/25**	**Emergency Medic**	**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 Cei	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 hc	8/1/23	12/31/25	Family Medicine	Family Medicine Rc	PA 601	Alliance Medical Cei	1	4	5
16	**Alliance Medical Center***	**Kanthi Kalidindi**	**Rotation 11(clinical hc**	**8/1/23**	**12/31/25**	**Family Medicine**	**Family Medicine R**	**PA 601**	**Average**	**1**	**4**	**5**
17	**Alliance Medical Center***	**Kanthi Kalidindi**	**Rotation 11(clinical hc**	**8/1/23**	**12/31/25**	**Family Medicine**	**Average**			**1**	**4**	**5**
18	**Alliance Medical Center***	**Kanthi Kalidindi**	**Rotation 11(clinical hc**	**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 Recons	General Surgery Ro	PA 603	Blossomvale Clinic -	1	5	4
22	**Blossomvale Clinic**	**Skylar Ford**	**Rotation 12***	**1/9/23**	**12/31/25**	**Plastic and Recon**	**General Surgery Rc**	**PA 603**	**Average**	**1**	**5**	**4**
23	**Blossomvale Clinic**	**Skylar Ford**	**Rotation 12***	**1/9/23**	**12/31/25**	**Plastic and Recon**	**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 Ro	PA 603	Blossomvale Clinic -	1	5	4
26	**Blossomvale Clinic**	**Skylar Ford**	**Rotation 3***	**12/5/22**	**12/31/25**	**Family Medicine**	**General Surgery Rc**	**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 Rc	PA 601	Blossomvale Clinic -	1	4	5
31	**Blossomvale Clinic**	**John Smith**	**Rotation 2***	**11/7/22**	**12/31/25**	**Family Medicine**	**Family Medicine R**	**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**								[illegible]	**4.5**	**4.5**