



# Add/Update Evaluations

Add new students to evals and correct settings. You will need to follow these steps when: 1. Before new students arrive at their phase II site. 2. New site director, 3. Sites request to change their time to complete evaluations.

1 Navigate to <https://medatrax.com/login/admin.aspx>

2 Click "Evaluation Admin"

The screenshot shows the Medatrax admin dashboard. The 'Evaluation Admin' link is highlighted with a blue circle. The dashboard includes a grid of icons for various functions: Options, Forms, Case Reports, Case Locations, Transcripts, Evaluations, Evaluation Results, Evaluation Scheduling, Evaluation Reports, Evaluation Admin (highlighted), Assignments, Site Directory, Mail Center (0), Help, and Logout. A red arrow points to the Logout button. On the right, a notice states: 'Medatrax offices will be closed on Thursday, Nov. 24, and Friday, Nov. 25 for the Thanksgiving Holiday. Our office will reopen Monday November 28th.' The Medatrax logo (Mx) is also visible. At the bottom, there is a footer with office hours and contact information.

Options Forms Case Reports

Case Locations Transcripts Evaluations

Evaluation Results Evaluation Scheduling Evaluation Reports

**Evaluation Admin** Assignments Site Directory

Mail Center (0) Help Logout

Medatrax offices will be closed on Thursday, Nov. 24, and Friday, Nov. 25 for the Thanksgiving Holiday. Our office will reopen Monday November 28th.

**Office Hours**  
Monday-Friday 7:00 AM - 9:00 PM CST  
Saturday 8:00 AM-12:00 PM CST

**Questions or Comments?**  
[Click here.](#)  
Phone: 800-647-4838

3 Click "Schedules"



The screenshot shows the Medatrax® website's Administration section. The header includes the Medatrax logo, the tagline "Clinical Data Tools for Health Professional Education", and an "Evaluations Area" link. A navigation bar lists: Home, Preview, Administration, Reports, Medatrax, Options, Objectives, Personnel, and Log Out. The Administration section is highlighted with a blue bar. Below it, several icons represent different functions: Schedules (clock icon), Results (document icon), Courses (book icon), Objectives (notepad icon), Locations (map icon), Terms (document icon), and Add/Edit Faculty (people icon).

4 We only use the top two evals so start with the Dual eval.



The screenshot shows the Medatrax® website's Schedules page. The header is identical to the previous page. The navigation bar lists: Preview, Administration, Reports, Medatrax, Options, Objectives, Personnel, and Log Out. The Schedules section is highlighted with a blue bar. Below it, a list of evaluation tools is displayed, each with a "Review" button. The list includes: "ment Tool (Dual)", "ment Tool (FWD)", "ition", "ity Evaluation USU", "ent Self-Evaluation", "nd Preceptor Evaluation", "nd Preceptor Evaluation 2013", "LINICAL EVALUATION TOOL--Summer Semester", "LINICAL EVALUATION TOOL-Summer Semester(forward to preceptor)", and "LINICAL EVALUATION TOOL--Fall Semester".

- 5 Without changing any settings click Search.

\*USU Clinical Assessment Tool (Dual)

Back
Create a New Schedule

Class: All Classes ▾

Student: All Students ▾ Active Only ☒

Faculty: All Faculty ▾ Active Only ☒

Keyword search:

Active Schedules Only ☒

Date Scheduled: From  To

End Date: From  To

Search

- 6 Start by clicking the first one and moving down from there.

Class: All Classes ▾

Student: All Students ▾ Active Only ☒

Faculty: All Faculty ▾ Active Only ☒

Keyword search:

Active Schedules Only ☒

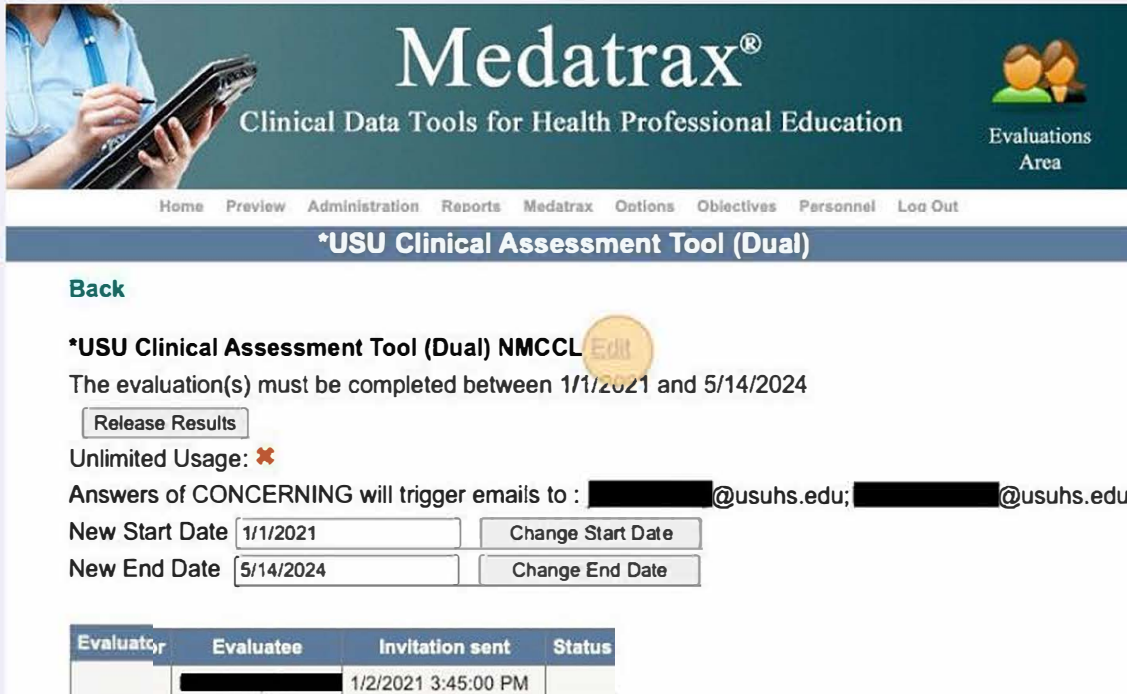
Date Scheduled: From  To

End Date: From  To

Search

Description	Created	Start date	End date	Invitations
*USU Clinical Assessment Tool (Dual) NMCCCL	1/2/2021	1/1/2021	5/14/2024	6 of 6 sent
*USU Clinical Assessment Tool (Dual) WRNMMC	1/2/2021	1/1/2021	5/14/2024	10 of 10 sent
*USU Clinical Assessment Tool (Dual) WPAFB	1/2/2021	1/1/2021	5/14/2024	16 of 16 sent
*USU Clinical Assessment Tool (Dual) TRAVIS	1/2/2021	1/1/2021	5/14/2024	16 of 16 sent
*USU Clinical Assessment Tool (Dual) FBCH	1/2/2021	1/1/2021	5/14/2024	18 of 18 sent
*USU Clinical Assessment Tool (Dual) NHJAX	1/2/2021	1/1/2021	5/14/2024	7 of 7 sent
*USU Clinical Assessment Tool (Dual) NMCSD	1/2/2021	1/1/2021	5/14/2024	19 of 19 sent
*USU Clinical Assessment Tool (Dual) NMCP	1/2/2021	1/1/2021	5/14/2024	11 of 11 sent

7 Click "Edit"



**Medatrax®**  
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Home Preview Administration Reports Medatrax Options Objectives Personnel Log Out

**\*USU Clinical Assessment Tool (Dual)**

[Back](#)

**\*USU Clinical Assessment Tool (Dual) NMCCCL** [Edit](#)

The evaluation(s) must be completed between 1/1/2021 and 5/14/2024

[Release Results](#)

Unlimited Usage: ✖

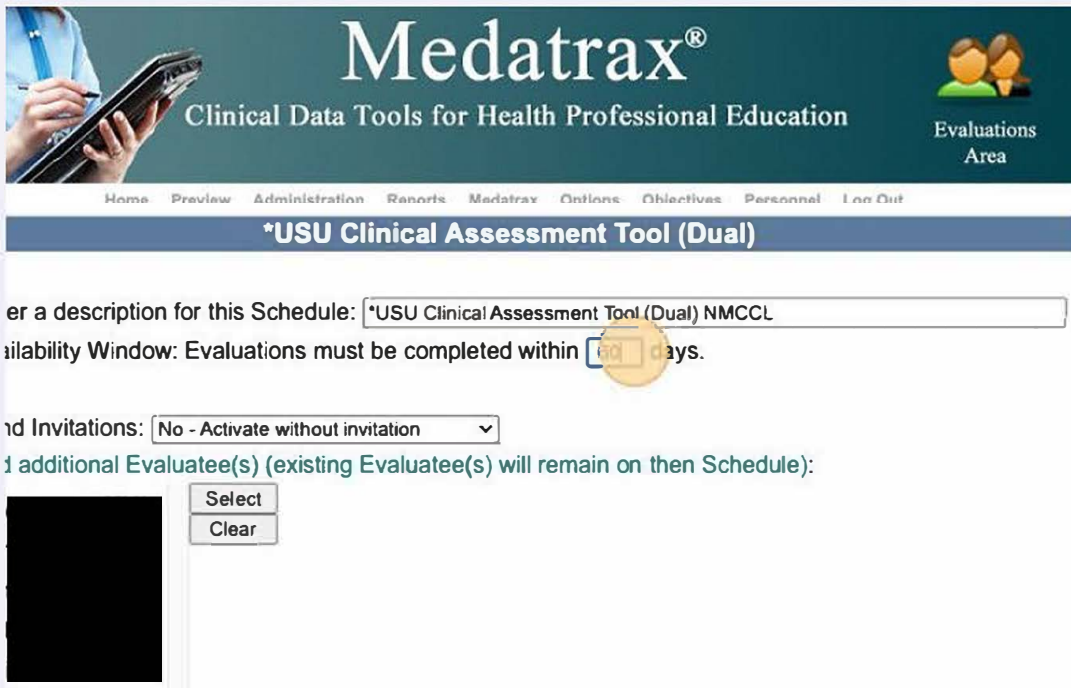
Answers of CONCERNING will trigger emails to : [redacted]@usuhs.edu; [redacted]@usuhs.edu

New Start Date  [Change Start Date](#)

New End Date  [Change End Date](#)

Evaluator	Evaluatee	Invitation sent	Status
	[redacted]	1/2/2021 3:45:00 PM	

8 30 days is a sensible number here. This will give the student 30 days to enter any paper evals that they receive back from the preceptor.



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Home Preview Administration Reports Medatrax Options Objectives Personnel Log Out

**\*USU Clinical Assessment Tool (Dual)**

Enter a description for this Schedule:

Availability Window: Evaluations must be completed within  days.

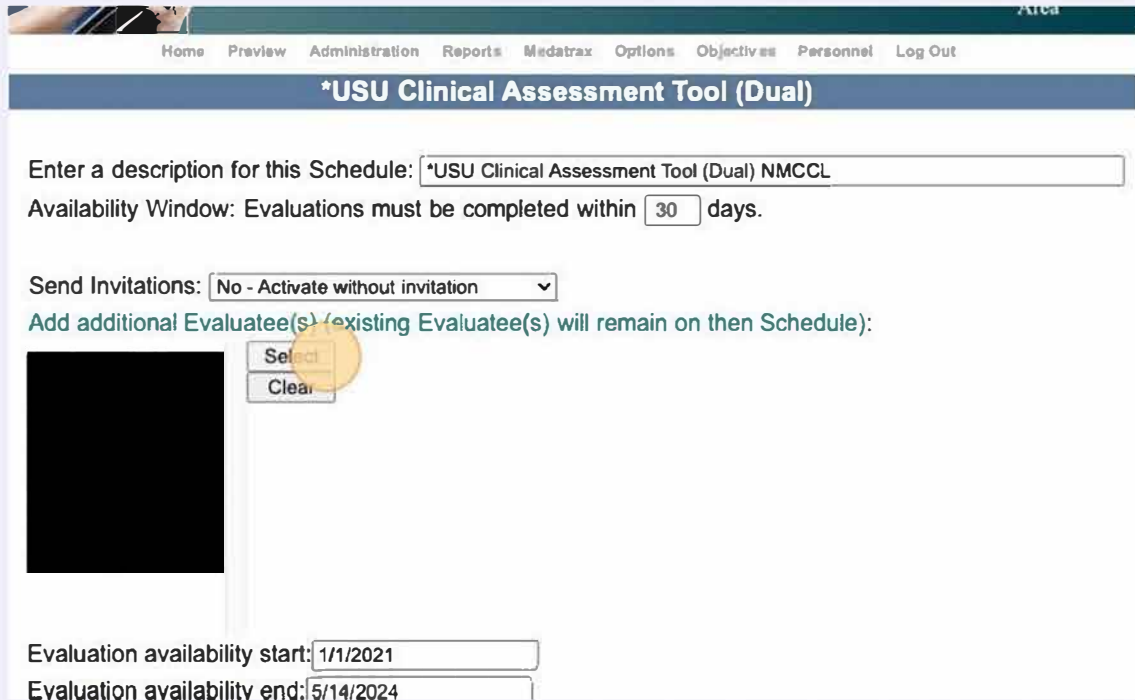
Send Invitations:

1 additional Evaluatee(s) (existing Evaluatee(s) will remain on then Schedule):

[Select](#)  
[Clear](#)

9

If you need to add new students click this button. You cannot remove previous students.



Home Preview Administration Reports Medatrax Options Objectives Personnel Log Out

## \*USU Clinical Assessment Tool (Dual)

Enter a description for this Schedule: \*USU Clinical Assessment Tool (Dual) NMCCCL

Availability Window: Evaluations must be completed within 30 days.

Send Invitations: No - Activate without invitation

Add additional Evaluatee(s) (existing Evaluatee(s) will remain on then Schedule):

Select

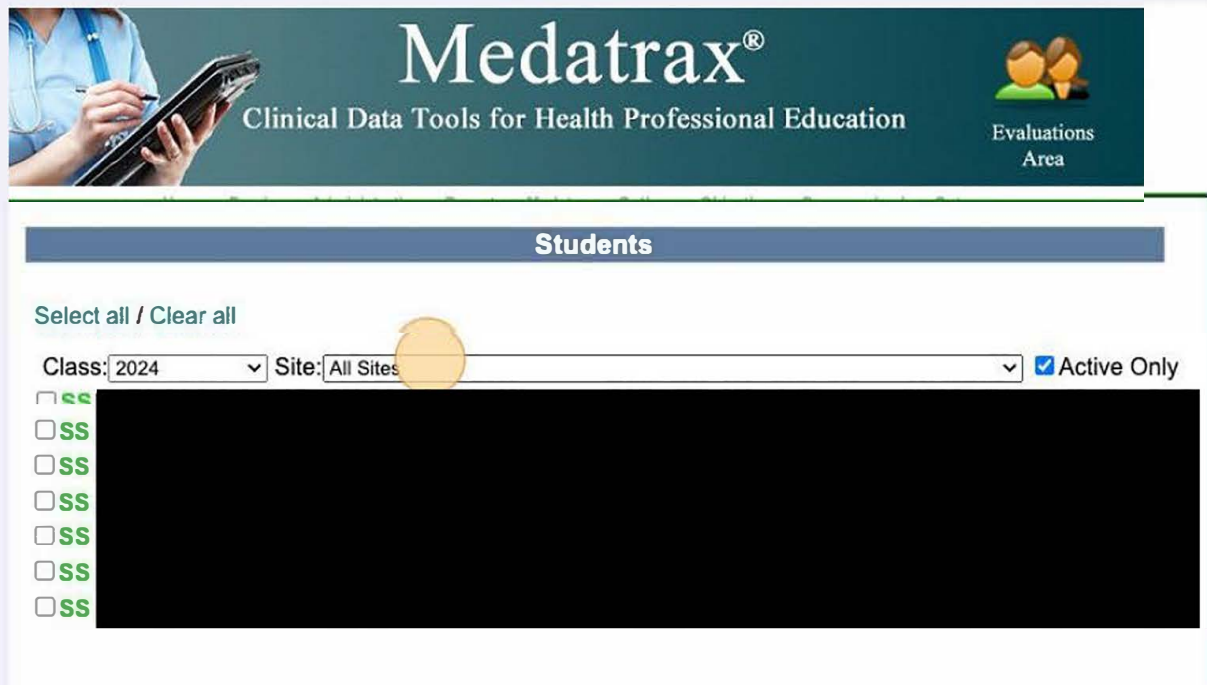
Clear

Evaluation availability start: 1/1/2021

Evaluation availability end: 5/14/2024

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Click this dropdown and select the site. You will be doing this for every site so if you forget which site this is, it is listed a few boxes above.



Medatrax®

Clinical Data Tools for Health Professional Education

Evaluations Area

## Students

Select all / Clear all

Class: 2024 Site: All Sites Active Only

11 Click "Select all"



**Students**

[Select all](#) / [Clear all](#)

Class: 2024 Site: USUHS-NMC-Camp Lejeune ☒ Active Only

☐ [Redacted]

12 Click OK.

**Students**

[Select all](#) / [Clear all](#)

Class: 2024 Site: USUHS-NMC-Camp Lejeune ☒ Active Only

☐ [Redacted]

Evaluation availability start: 1/1/2021

Evaluation availability end: 5/14/2024



13 If they are already listed, click clear.

Home Preview Administration Reports Medstrax Options Objectives Personnel Log Out

### \*USU Clinical Assessment Tool (Dual)

Enter a description for this Schedule:

Availability Window: Evaluations must be completed within  days.

Send Invitations:

Add additional Evaluatee(s) (existing Evaluatee(s) will remain on then Schedule):

Select  
Clear

Evaluation availability start:

Evaluation availability end:

14 Change the end date to the last date of the junior class.

Select  
Clear

Evaluation availability start:

Evaluation availability end:

Additional Notices can be s

Date 1:

Date 2:

Unlimited Usage ☐

Instructions for Email Invite

May, 2024

Su	Mo	Tu	We	Th	Fr	Sa
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

Today: November 14, 2022

- 15 Verify the site director and the director of clinical education is listed in this field to receive concerning notification. They should be semicolon separated. e.g. [redacted]@usuhs.edu; [redacted]@usuhs.edu'

Date 2: [redacted] (Optional)

Unlimited Usage ☐

Instructions for Email Invitation:

Enable Email Warnings ☒

Email Recipients: [redacted]@usuhs.edu; [redacted]@usuhs.edu (separated by ;)

Select the Answers that will trigger a warning:

Answer Type: [NA, 0-4Con-Pro v]

Answer: ☐ NA

- ☒ CONCERNING
- ☐ NOVICE
- ☐ ADVANCED BEGINNER
- ☐ COMPETENT
- ☐ PROFICIENT

- 16 Click this button.

Enable Email Warnings ☒

Email Recipients: [redacted]@usuhs.edu; [redacted]@usuhs.edu (separated by ;)

Select the Answers that will trigger a warning:

Answer Type: [NA, 0-4Con-Pro v]

Answer: ☐ NA

- ☒ CONCERNING
- ☐ NOVICE
- ☐ ADVANCED BEGINNER
- ☐ COMPETENT
- ☐ PROFICIENT





- 17 Click the next one in line and repeat the process for each site.

Faculty:  Active Only ☒

Keyword search:


Active Schedules Only ☒

Date Scheduled: From  To

End Date: From  To


Description	Created	Start date	End date	Invitations
*USU Clinical Assessment Tool (Dual) NMCCL	1/2/2021	1/1/2021	5/14/2025	6 of 6 sent
*USU Clinical Assessment Tool (Dual) WRNMMC	1/2/2021	1/1/2021	5/14/2024	10 of 10 sent
*USU Clinical Assessment Tool (Dual) WPAFB	1/2/2021	1/1/2021	5/14/2024	16 of 16 sent
*USU Clinical Assessment Tool (Dual) TRAVIS	1/2/2021	1/1/2021	5/14/2024	16 of 16 sent
*USU Clinical Assessment Tool (Dual) FBCH	1/2/2021	1/1/2021	5/14/2024	18 of 18 sent
*USU Clinical Assessment Tool (Dual) NHJAX	1/2/2021	1/1/2021	5/14/2024	7 of 7 sent
*USU Clinical Assessment Tool (Dual) NMCSD	1/2/2021	1/1/2021	5/14/2024	19 of 19 sent
*USU Clinical Assessment Tool (Dual) NMCP	1/2/2021	1/1/2021	5/14/2024	11 of 11 sent

- 18 After all of those are complete, Click "Back"



# Medatrax®

Clinical Data Tools for Health Professional Education



Evaluations Area

[Home](#)
[Preview](#)
[Administration](#)
[Reports](#)
[Medatrax](#)
[Options](#)
[Objectives](#)
[Personnel](#)
[Log Out](#)

## \*USU Clinical Assessment Tool (Dual)

[Back](#)
[Create a New Schedule](#)

Class:

Student:  Active Only ☒

Faculty:  Active Only ☒

Keyword search:

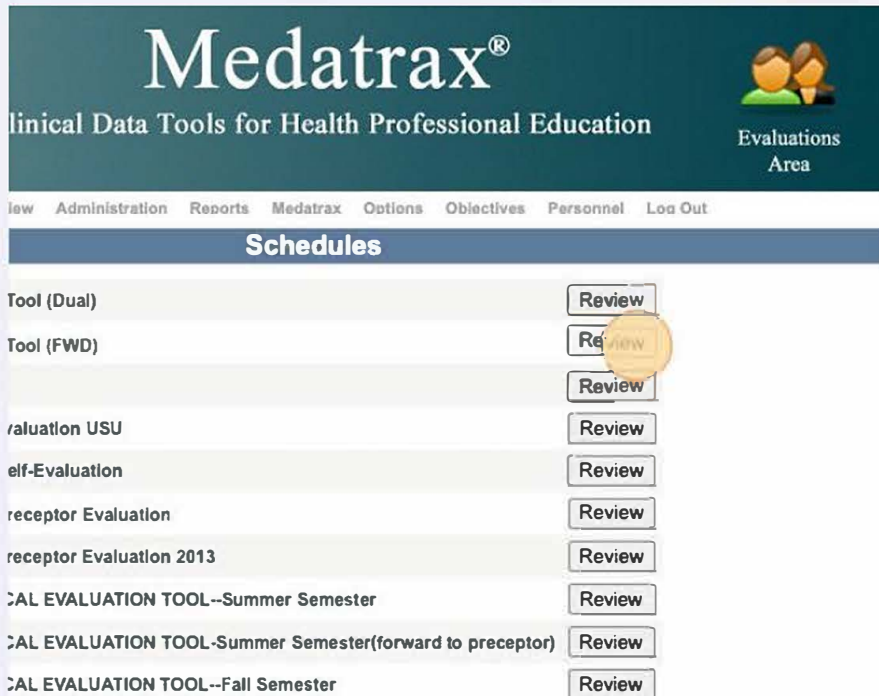
Active Schedules Only ☒

Date Scheduled: From  To

End Date: From  To

Description	Created	Start date	End date	Invitations
*USU Clinical Assessment Tool (Dual) NMCCL	1/2/2021	1/1/2021	5/14/2025	6 of 6 sent

- 19 Repeat the same process for the FWD evals.



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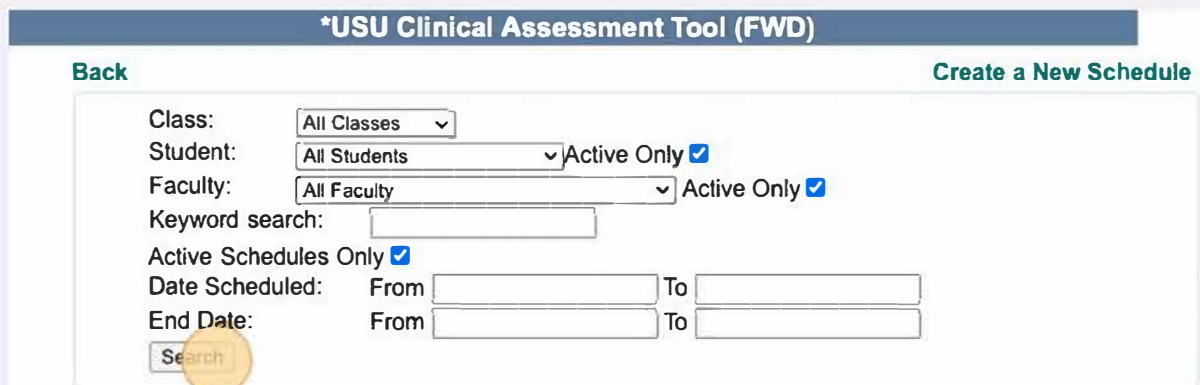
Evaluations Area

Home Administration Reports Medatrax Options Objectives Personnel Log Out

**Schedules**

Tool (Dual)	Review
Tool (FWD)	Review
	Review
valuation USU	Review
elf-Evaluation	Review
receptor Evaluation	Review
receptor Evaluation 2013	Review
ICAL EVALUATION TOOL--Summer Semester	Review
ICAL EVALUATION TOOL-Summer Semester(forward to preceptor)	Review
ICAL EVALUATION TOOL--Fall Semester	Review

- 20 Click this button.



**\*USU Clinical Assessment Tool (FWD)**

[Back](#) [Create a New Schedule](#)


Class: All Classes ▾  
Student: All Students ▾ Active Only ☒  
Faculty: All Faculty ▾ Active Only ☒  
Keyword search:   
Active Schedules Only ☒  
Date Scheduled: From  To   
End Date: From  To

## 21 Start with the first one and work your way down.

Class:    
 Student:  ☒ Active Only   
 Faculty:  ☒ Active Only   
 Keyword search:    
 Active Schedules Only ☒   
 Date Scheduled: From  To    
 End Date: From  To


Description	Created	Start date	End date	Invitations
USU Clinical Assessment Tool (FWD) NMCCCL	5/19/2022	10/1/2021	7/1/2024	4 of 4 sent
*USU Clinical Assessment Tool (FWD) NHJAX	1/2/2021	1/1/2021	5/14/2024	7 of 7 sent
*USU Clinical Assessment Tool (FWD) WRNMMC	1/2/2021	1/1/2021	5/14/2024	9 of 9 sent
*USU Clinical Assessment Tool (FWD) WPAFB	1/2/2021	1/1/2021	5/14/2024	16 of 16 sent
*USU Clinical Assessment Tool (FWD) TRAVIS	1/2/2021	1/1/2021	5/14/2024	16 of 16 sent
*USU Clinical Assessment Tool (FWD) FBCH	1/2/2021	1/1/2021	5/14/2024	18 of 18 sent
*USU Clinical Assessment Tool (FWD) NMCSO	1/2/2021	1/1/2021	5/14/2024	16 of 16 sent
*USU Clinical Assessment Tool (FWD) NMCP	1/2/2021	1/1/2021	5/14/2024	18 of 18 sent

## 22 Click "Edit"



# Medatrax®

Clinical Data Tools for Health Professional Education



Evaluations Area

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[Log Out](#)

### \*USU Clinical Assessment Tool (FWD)

[Back](#)

**USU Clinical Assessment Tool (FWD) NMCCCL** [Edit](#)

The evaluation(s) must be completed between 10/1/2021 and 7/1/2024


Unlimited Usage: ✖

New Start Date

New End Date

Evaluator	Evaluatee	Invitation sent	Status
		8/24/2022 9:47:00 AM	
		5/19/2022 9:55:00 AM	

**23** Change the date to the end date of the junior class.



Select  
Clear

Evaluation availability start: 10/1/2021  
Evaluation availability end: 7/1/2024

Additional Notices can be sent to all participants on:  
Date 1: (Optional)  
Date 2: (Optional)

Unlimited Usage ☐

Instructions for Email Invitation:

**24** Click the "Enable Email Warnings" field if it is not enabled.

Date 2: (Optional)

Unlimited Usage ☐

Instructions for Email Invitation:

Enable Email Warnings ☐

Update Schedule Cancel

25

Enter semicolon separated values for the site director and director of clinical education as before.

Site Director: \_\_\_\_\_ (optional)

Unlimited Usage ☐

Instructions for Email Invitation:

Enable Email Warnings ☒

Email Recipients: \_\_\_\_\_ (separated by ;)

Select the Answers that will trigger a warning:

Answer Type:

Answer: ☐ NA

☐ CONCERNING

☐ NOVICE

☐ ADVANCED BEGINNER

☐ COMPETENT

☐ PROFICIENT

26

Click the "CONCERNING" field.

Instructions for Email Invitation:

Enable Email Warnings ☒

Email Recipients: \_\_\_\_\_@usuhs.edu; \_\_\_\_\_@usuhs.edu (separated by ;)

Select the Answers that will trigger a warning:

Answer Type:

Answer: ☐ NA

☒ CONCERNING

☐ NOVICE

☐ ADVANCED BEGINNER

☐ COMPETENT

☐ PROFICIENT



Schedule

Cancel

## 27 Click this button.

Instructions for Email Invitation:

Enable Email Warnings ☒

Email Recipients: [REDACTED]@usuhs.edu; [REDACTED]@usuhs.edu (separated by ;)

Select the Answers that will trigger a warning:

Answer Type: NA, 0-4Con-Pro ▼

Answer: ☐ NA

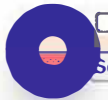
☒ CONCERNING

☐ NOVICE

☐ ADVANCED BEGINNER

☐ COMPETENT

☐ PROFICIENT



## 28 Start over for the next site.

Student: All Students ▼ Active Only ☒

Faculty: All Faculty ▼ Active Only ☒

Keyword search:

Active Schedules Only ☒

Date Scheduled: From  To

End Date: From  To

Description	Created	Start date	End date	Invitations
USU Clinical Assessment Tool (FWD) NMCCL	5/19/2022	10/1/2021	7/1/2025	4 of 4 sent
*USU Clinical Assessment Tool (FWD) NHJAX	1/2/2021	1/1/2021	5/14/2024	7 of 7 sent
*USU Clinical Assessment Tool (FWD) WRNMMC	1/2/2021	1/1/2021	5/14/2024	9 of 9 sent
*USU Clinical Assessment Tool (FWD) WPAFB	1/2/2021	1/1/2021	5/14/2024	16 of 16 sent
*USU Clinical Assessment Tool (FWD) TRAVIS	1/2/2021	1/1/2021	5/14/2024	16 of 16 sent
*USU Clinical Assessment Tool (FWD) FBCH	1/2/2021	1/1/2021	5/14/2024	18 of 18 sent
*USU Clinical Assessment Tool (FWD) NMCSD	1/2/2021	1/1/2021	5/14/2024	16 of 16 sent
*USU Clinical Assessment Tool (FWD) NMCP	1/2/2021	1/1/2021	5/14/2024	18 of 18 sent



29

The old defaults were 7 days to send the eval and 3 days to respond. We have had problems getting preceptors to respond within 3 days so we set both numbers to 30 days and have had better success that way. Individual sites might request different values here as it suits their workflow. If an evaluation doesn't get a response from the preceptor, the student has to resend the evaluation.

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Clinical Data Tools for Health Professional Education

Home Preview Administration Reports Medatrax Options Objectives Personnel Log Out

**\*USU Clinical Assessment Tool (FWD)**

Enter a description for this Schedule: \*USU Clinical Assessment Tool (FWD) WRNMMC

Availability Window: Evaluations must be completed within 7 days.

Forwarding Window: Evaluations must be completed within 3 days after forward/invite.

Send Invitations: No - Activate without invitation

Add additional Evaluatee(s) (existing Evaluatee(s) will remain on then Schedule):

Select  
Clear

30

Click here.

Enter a description for this Schedule: \*USU Clinical Assessment Tool (FWD) WRNMMC

Availability Window: Evaluations must be completed within 30 days.

Forwarding Window: Evaluations must be completed within 30 days after forward/invite.

Send Invitations: No - Activate without invitation

Add additional Evaluatee(s) (existing Evaluatee(s) will remain on then Schedule):

Select  
Clear

Evaluation availability start: 1/1/2021

Evaluation availability end: 5/1/2024