# 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.

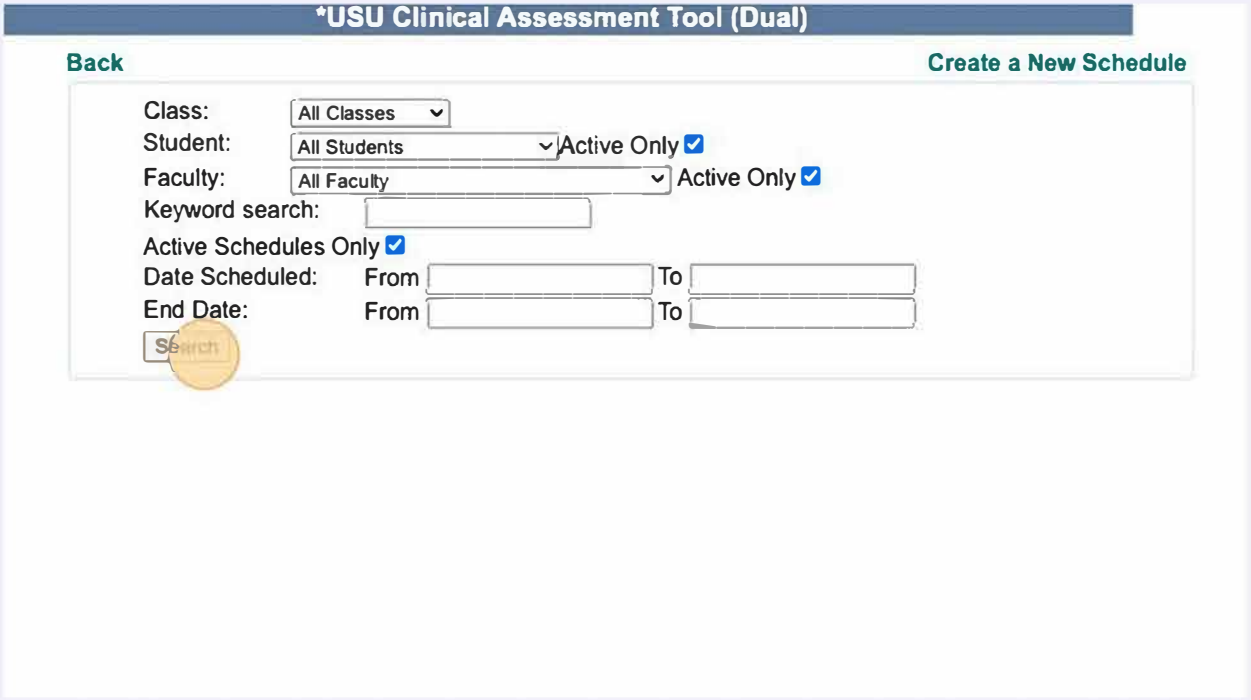
**1** Navigate to https://medatrax.com/login/admin.aspx

**2** Click "Evaluation Admin"

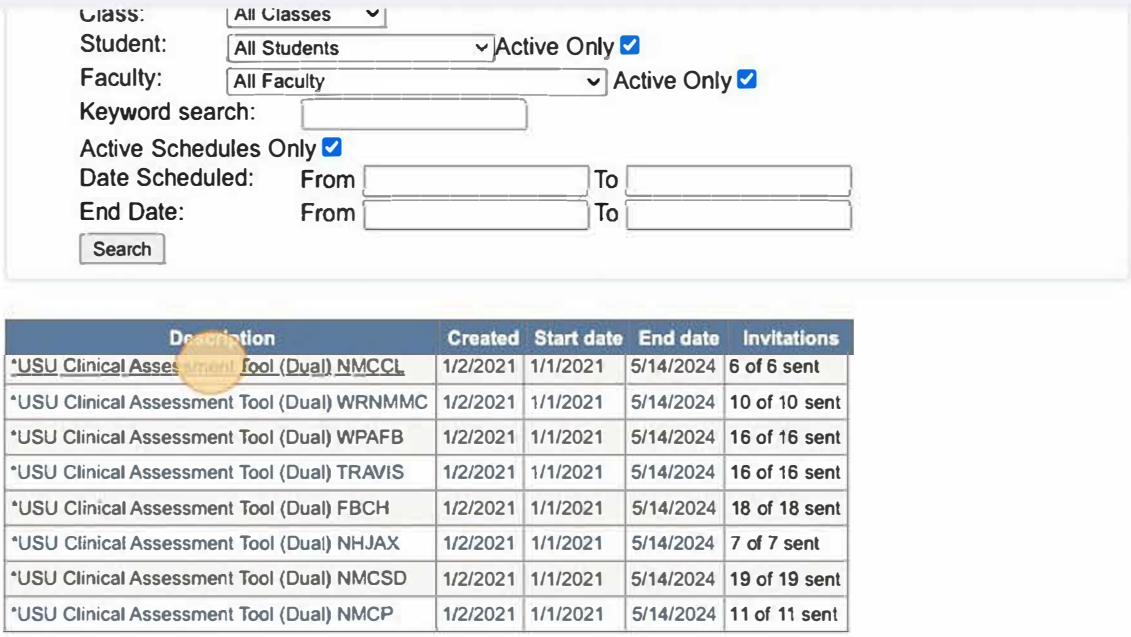
3 Click "Schedules"

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

5 Without changing any settings click Search.

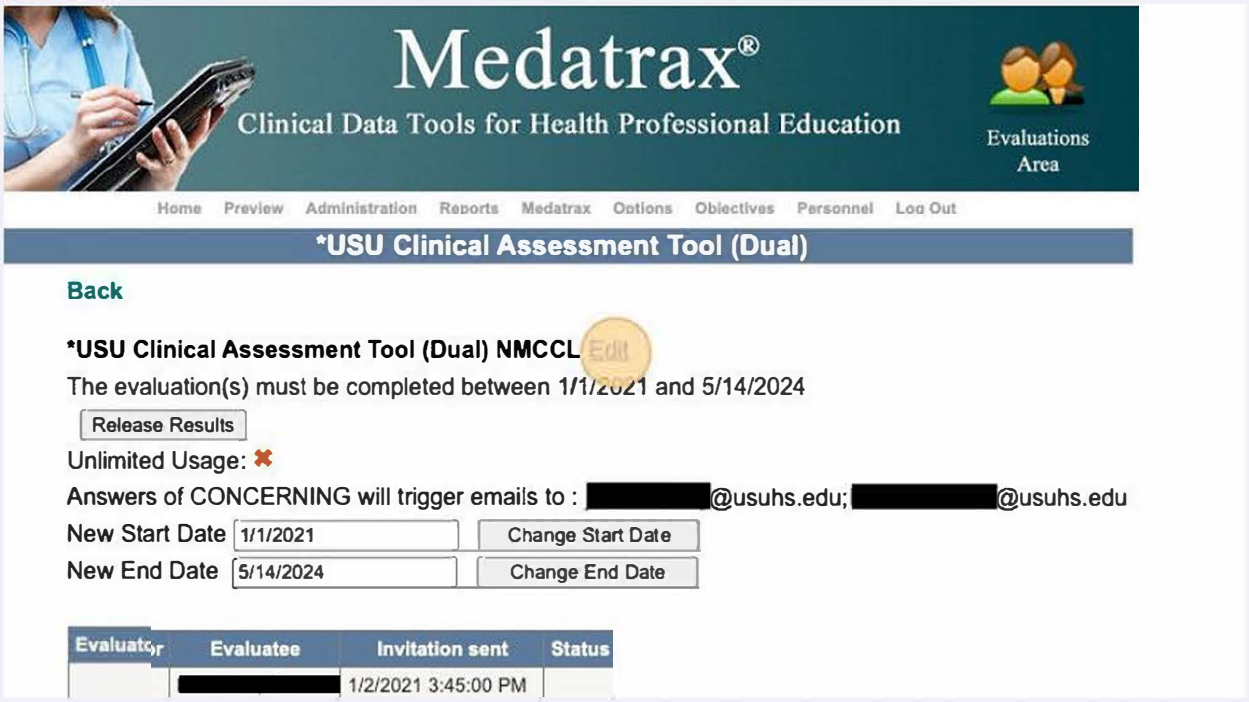



6 Start by clicking the first one and moving down from there.

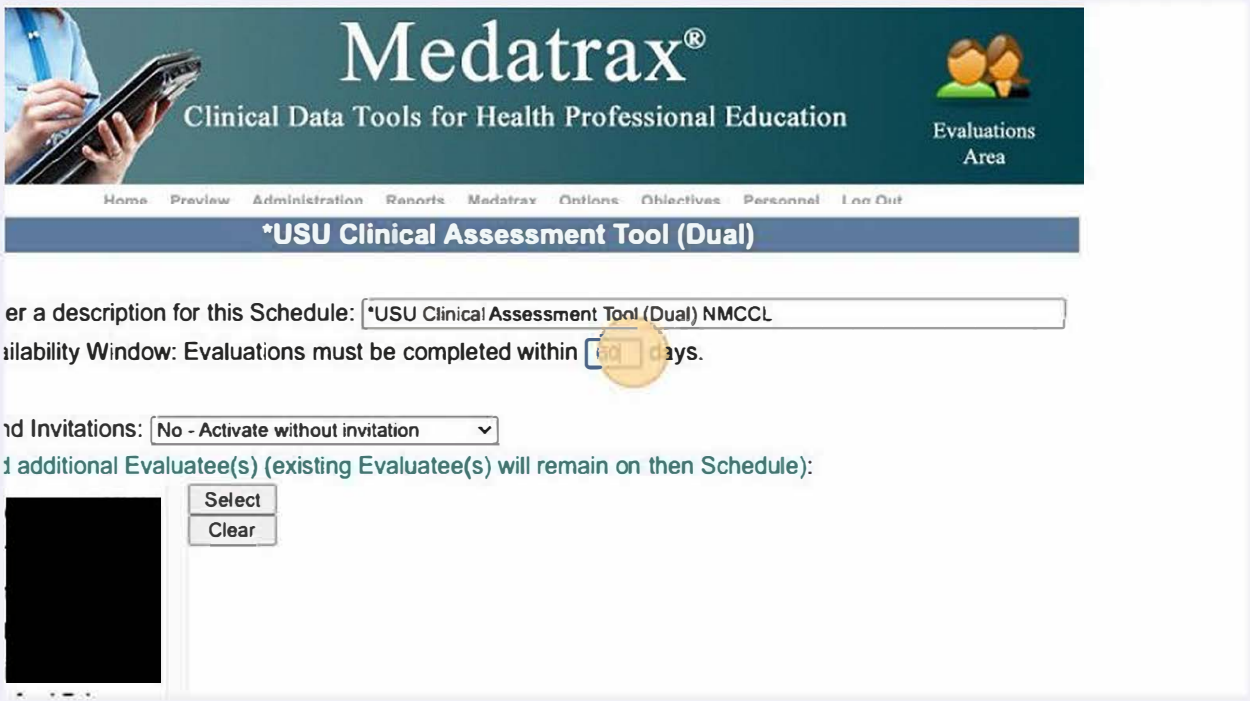



| Description | Created | Start date | End date | Invitations |
|---|---|---|---|---|
| *USU Clinical Assessment Tool (Dual) NMCCL | 1/2/2021 | 1/1/2021 | 5/14/2024 | 6 of 6 sent |
| *USU Clinical Assessment Tool (Dual) WRNMMC | 1/2/2021 | 1/1/2021 | 5/14/2024 | 10 of 10 sent |
| *USU Clinical Assessment 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 |

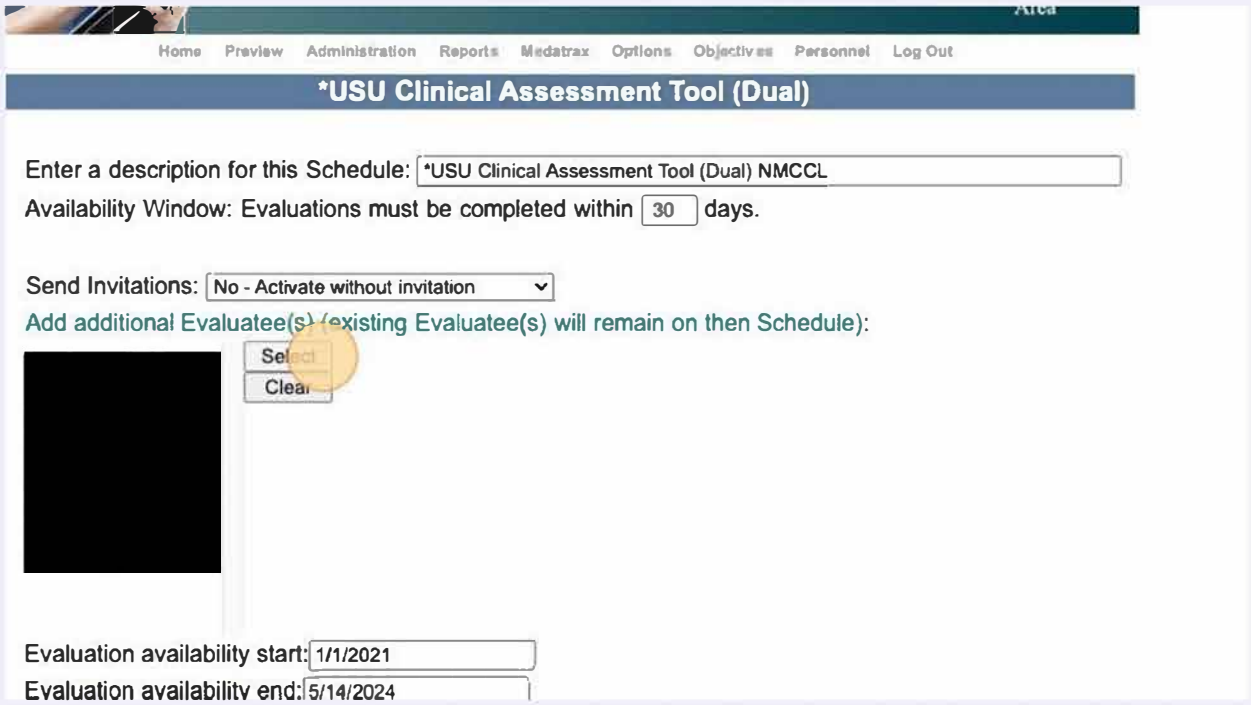
7 Click "Edit"



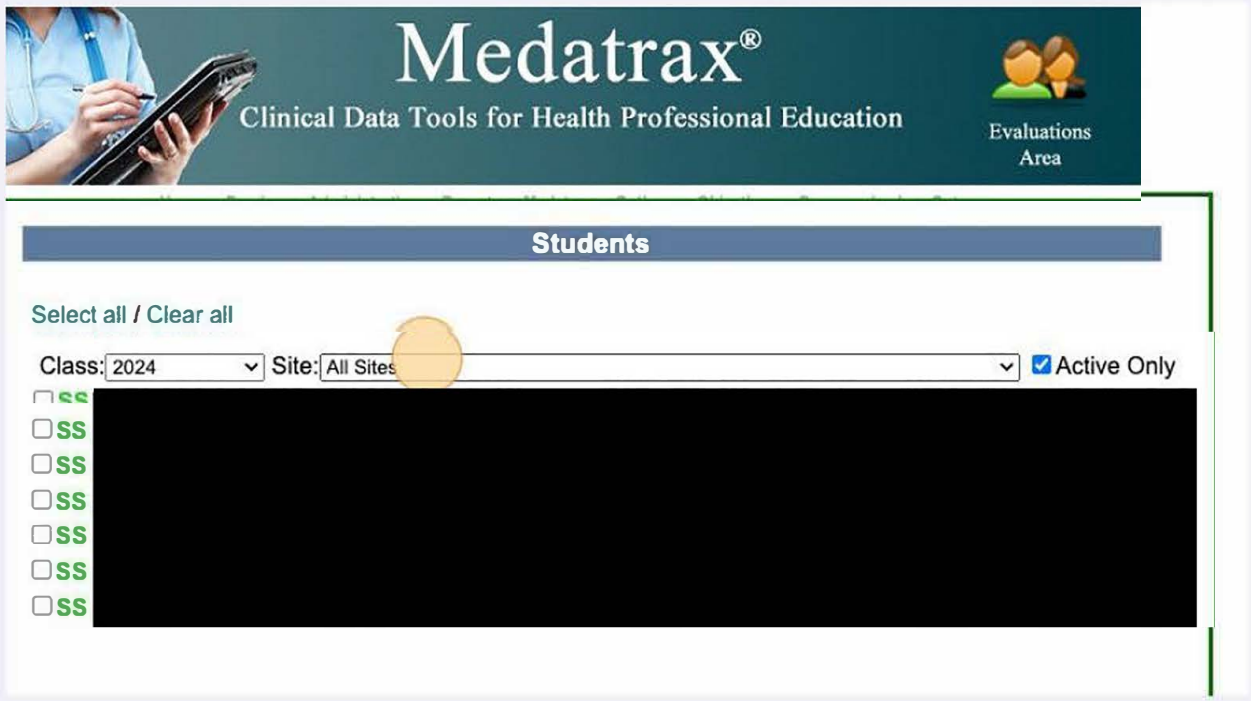

8 30 days is a sensible number here. This will give the student 30 days to enter any paper evals that they receive back from the preceptor.



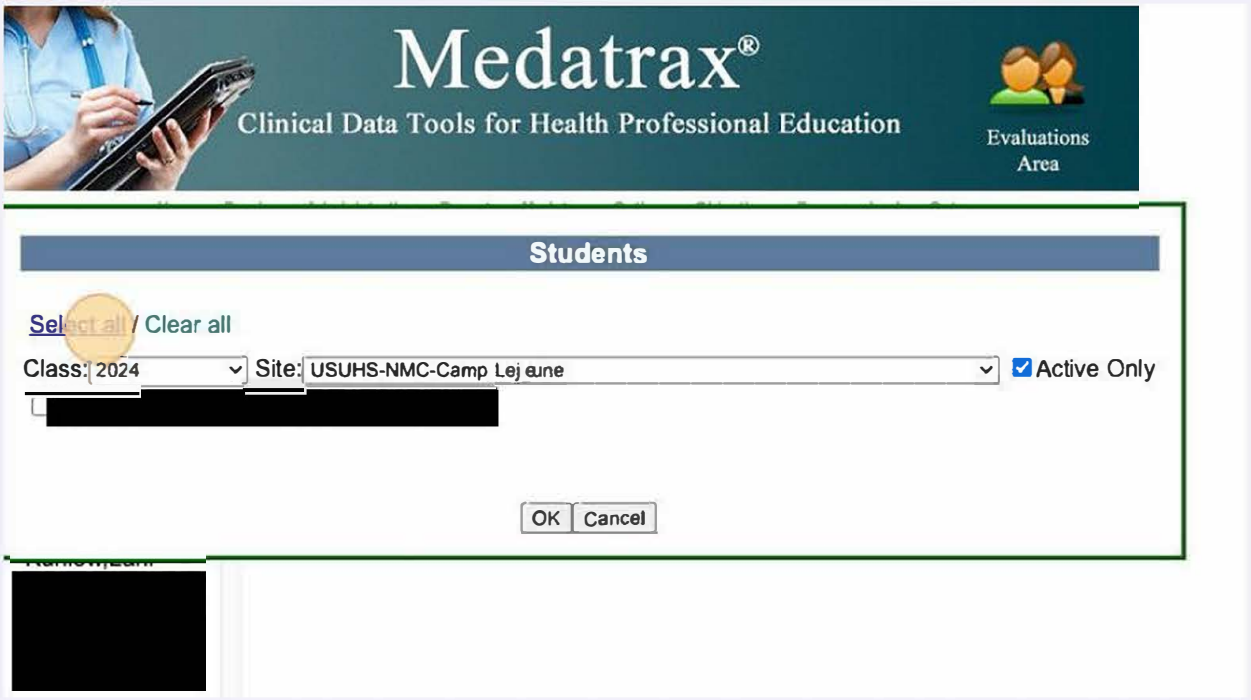
**9** If you need to add new students click this button. You cannot remove previous students.



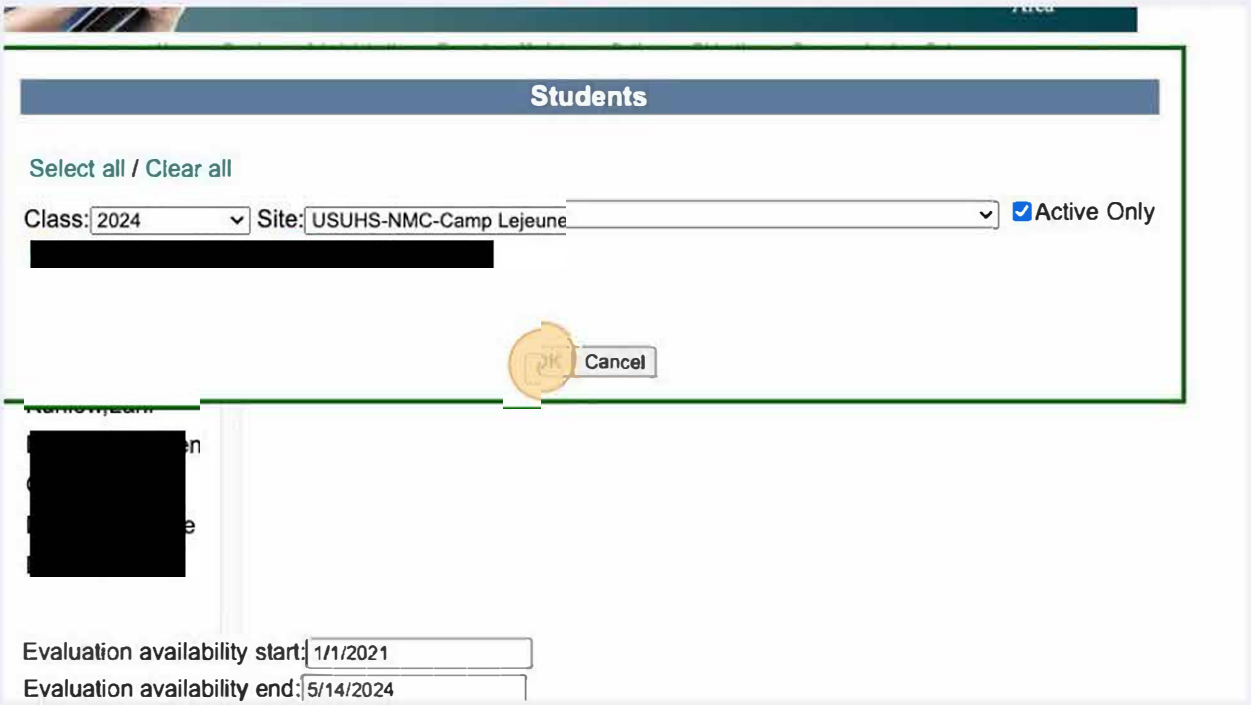

**10** Click this dropdown and select the site. You will be doing this for every site so if you forget which site this is, it is listed a few boxes above.



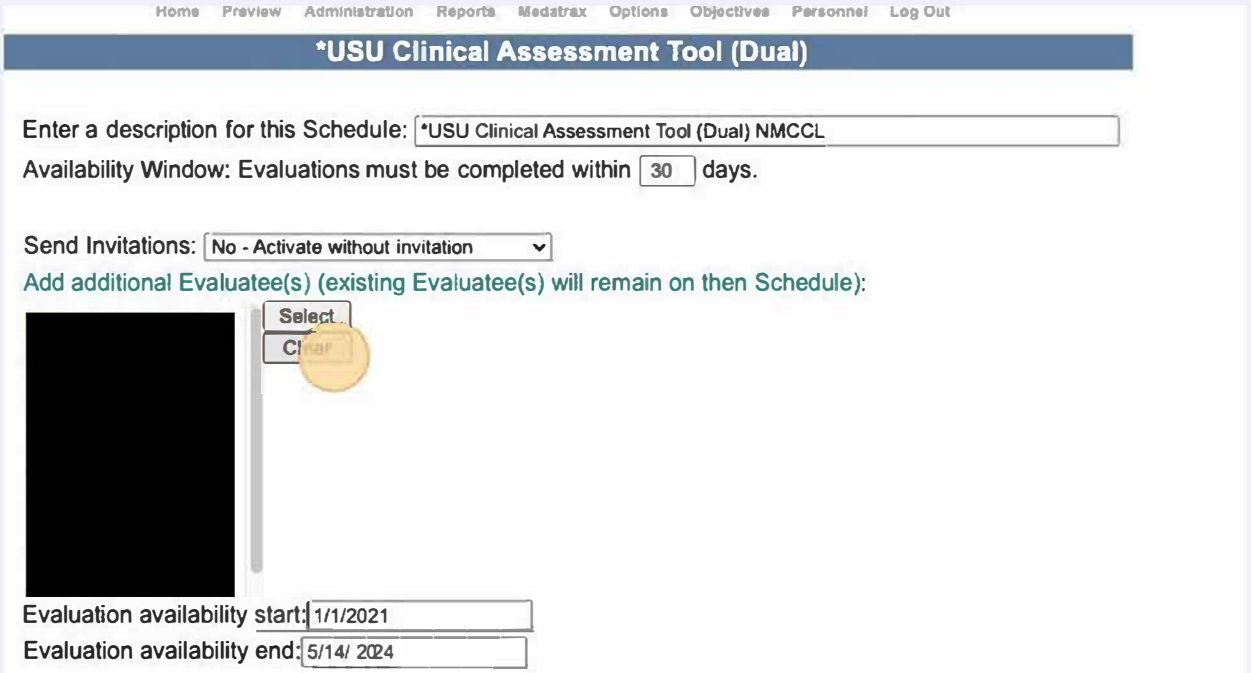
**11** Click "Select all"



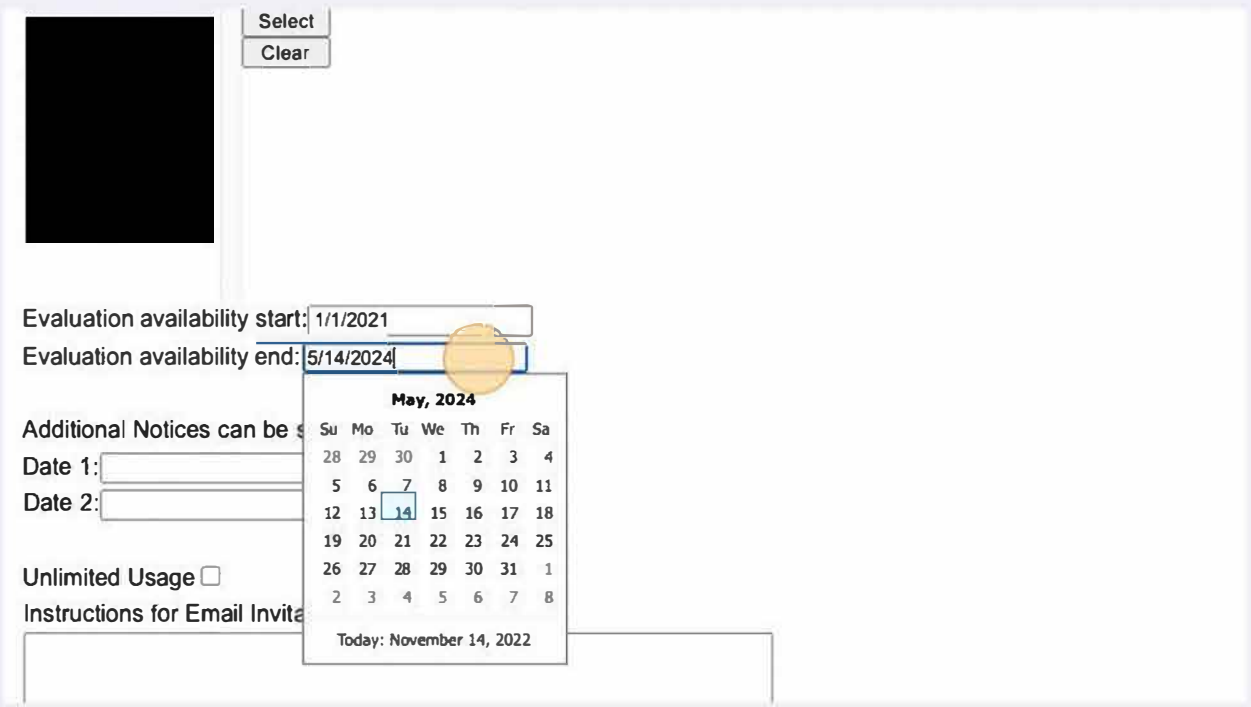

**12** Click OK.



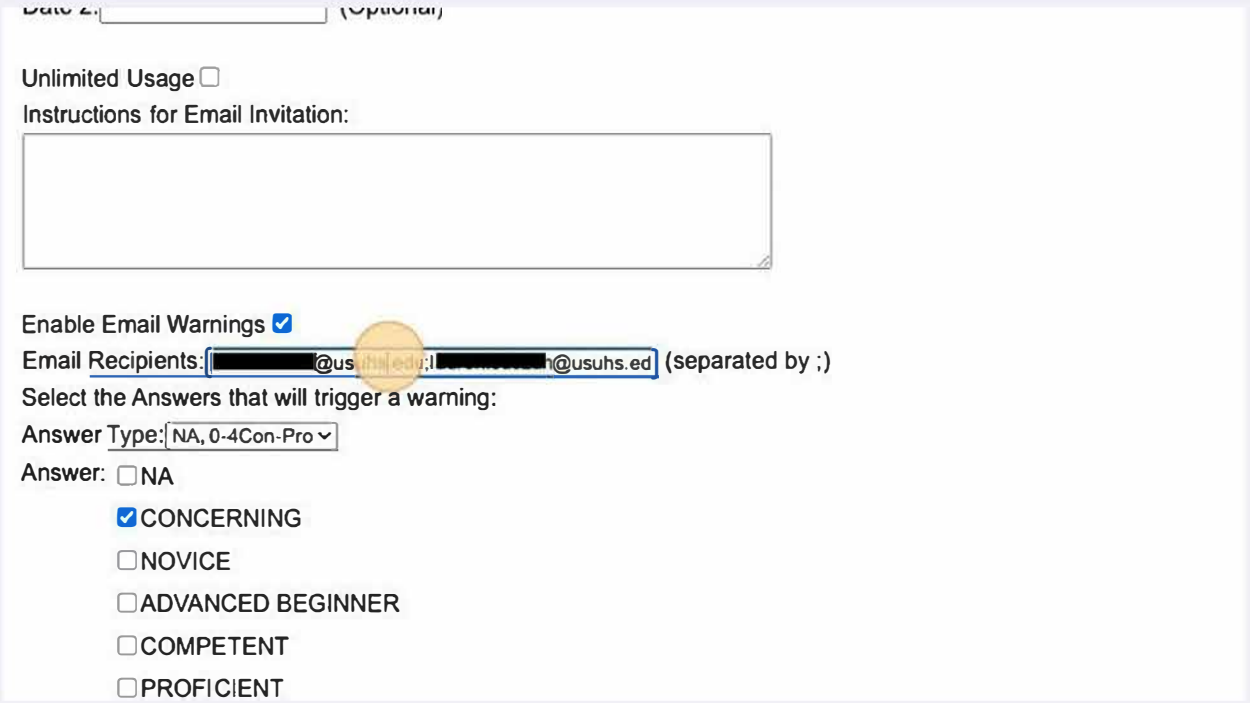
**13** If they are already listed, click clear.



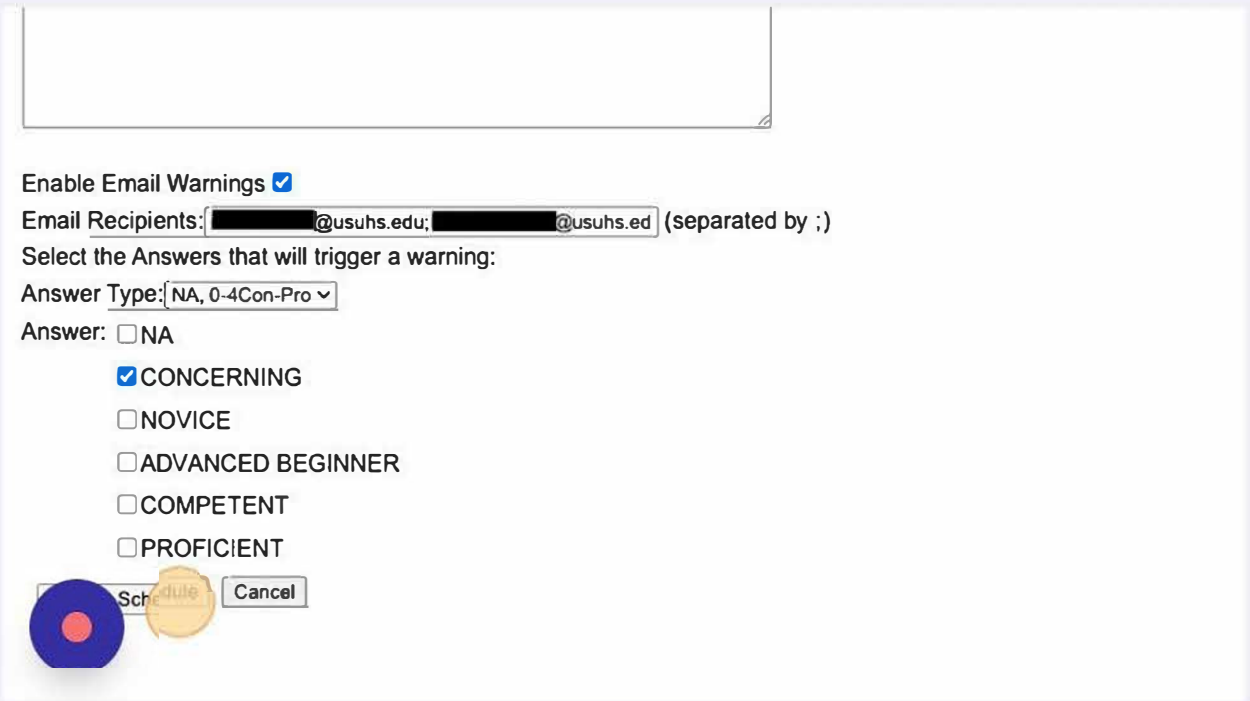

**14** Change the end date to the last date of the junior class.



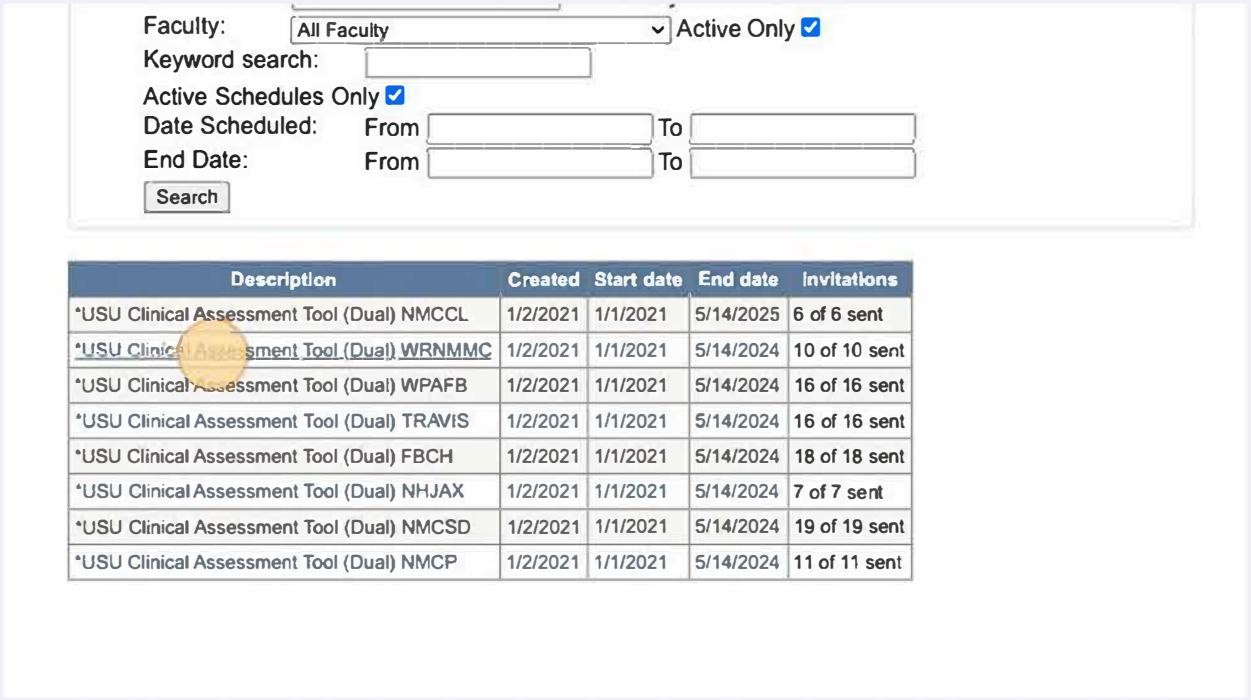
15 Verify the site director and the director of clinical education is listed in this field to receive concerning notification. They should be semicolon separated. e.g. [redacted]@usuhs.edu;[redacted]@usuhs.edu'



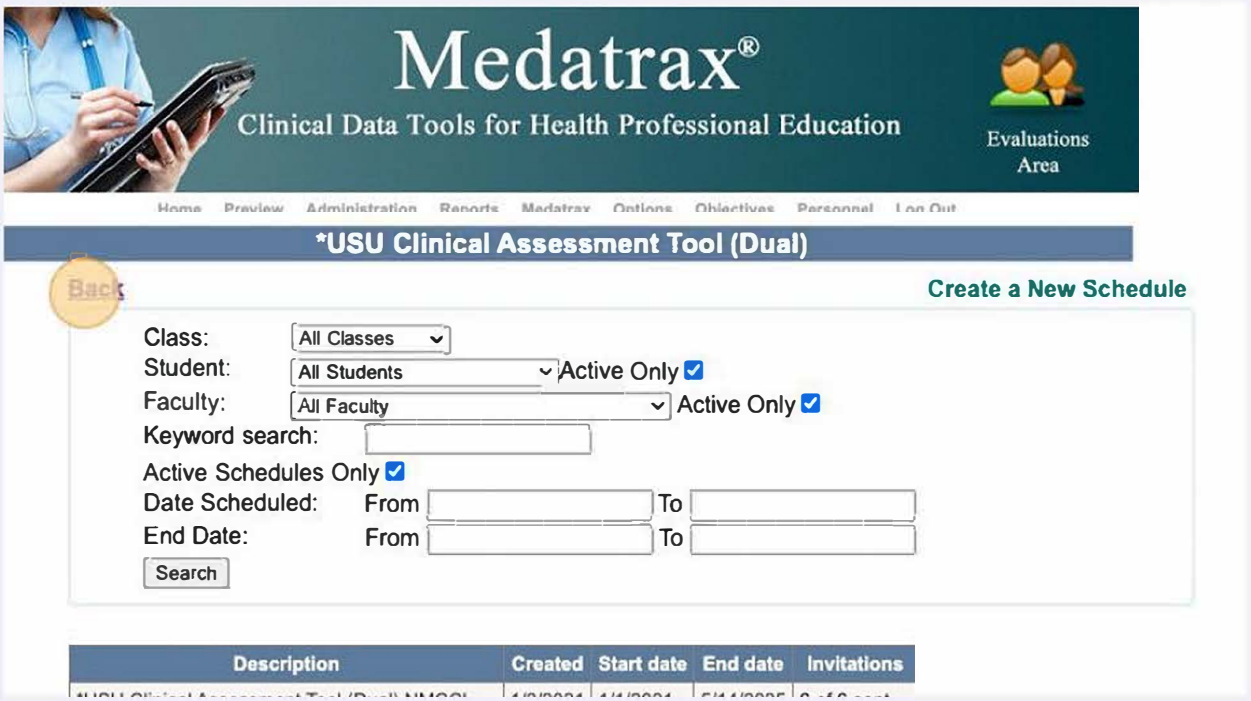

16 Click this button.



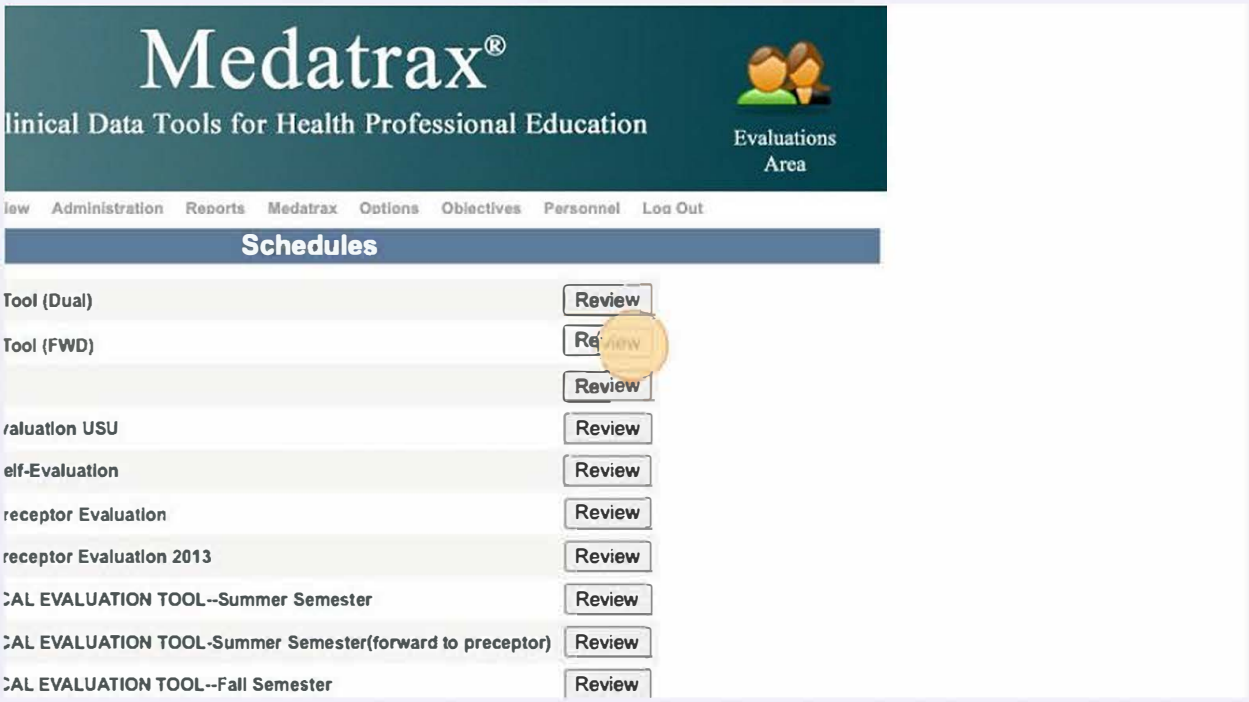
**17** Click the next one in line and repeat the process for each site.



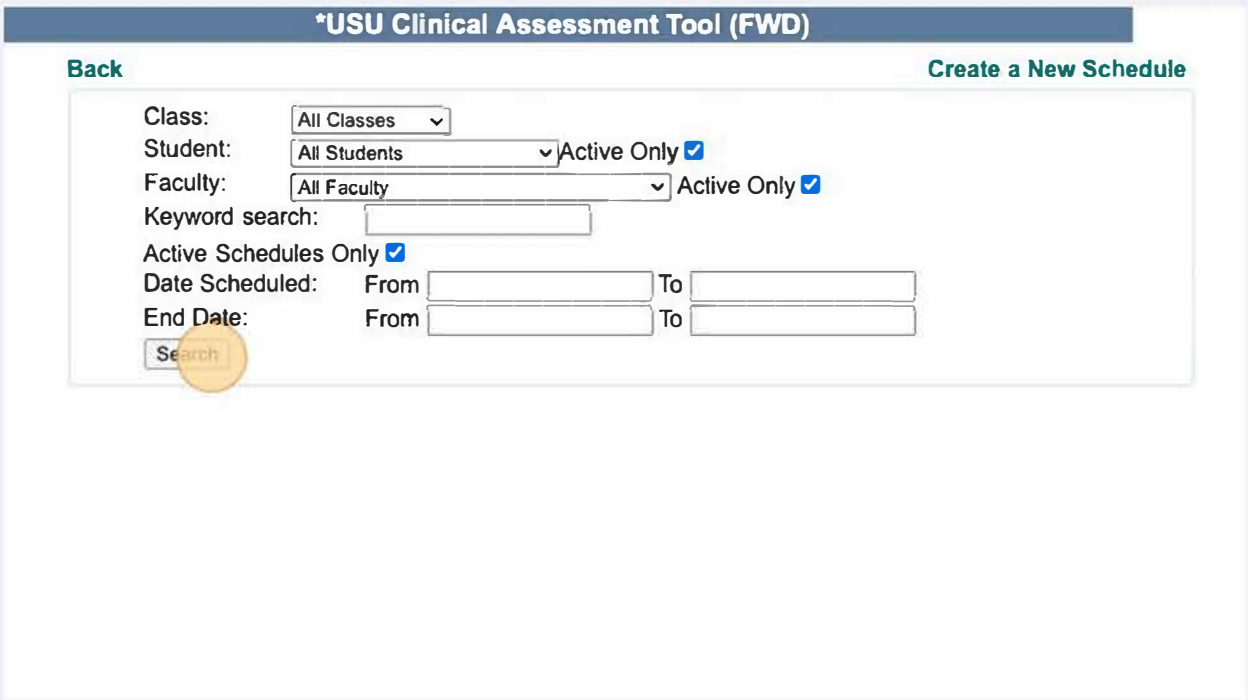

**18** After all of those are complete, Click "Back"



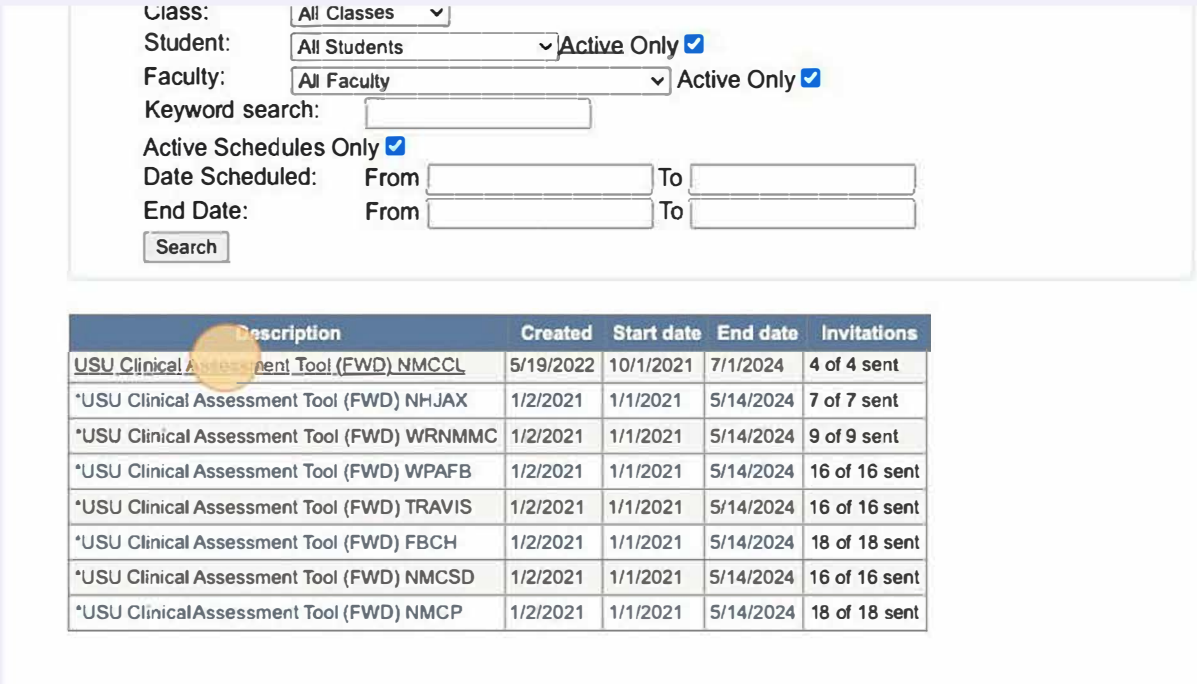
19 Repeat the same process for the FWD evals.



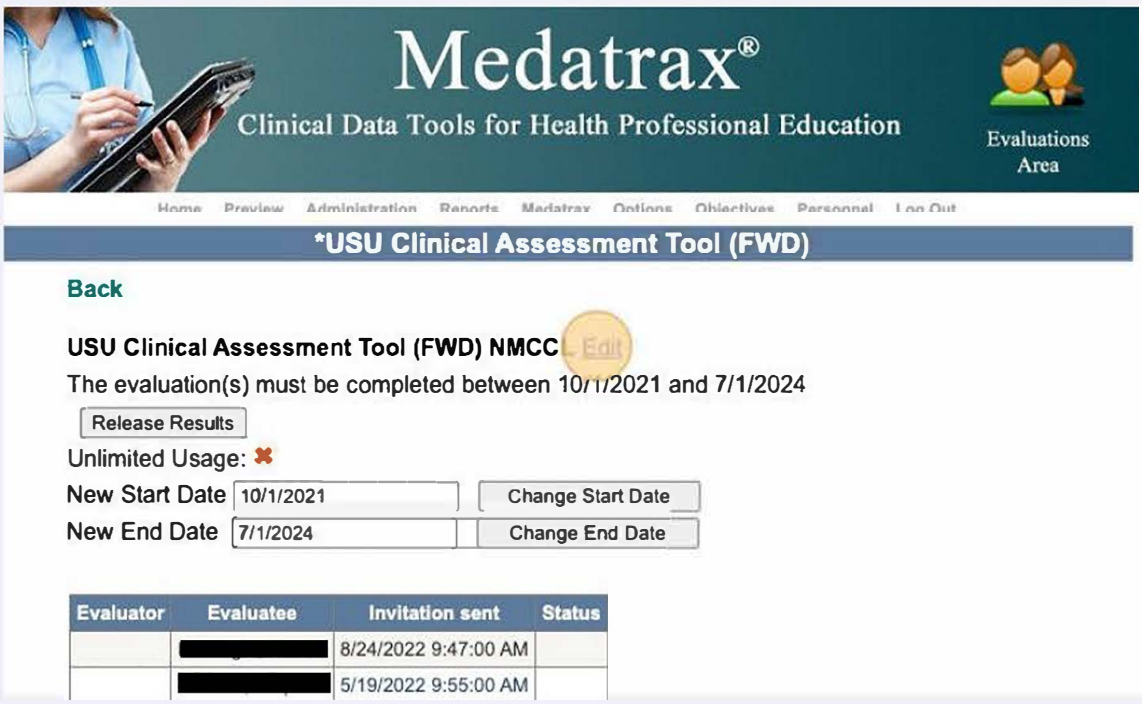

20 Click this button.



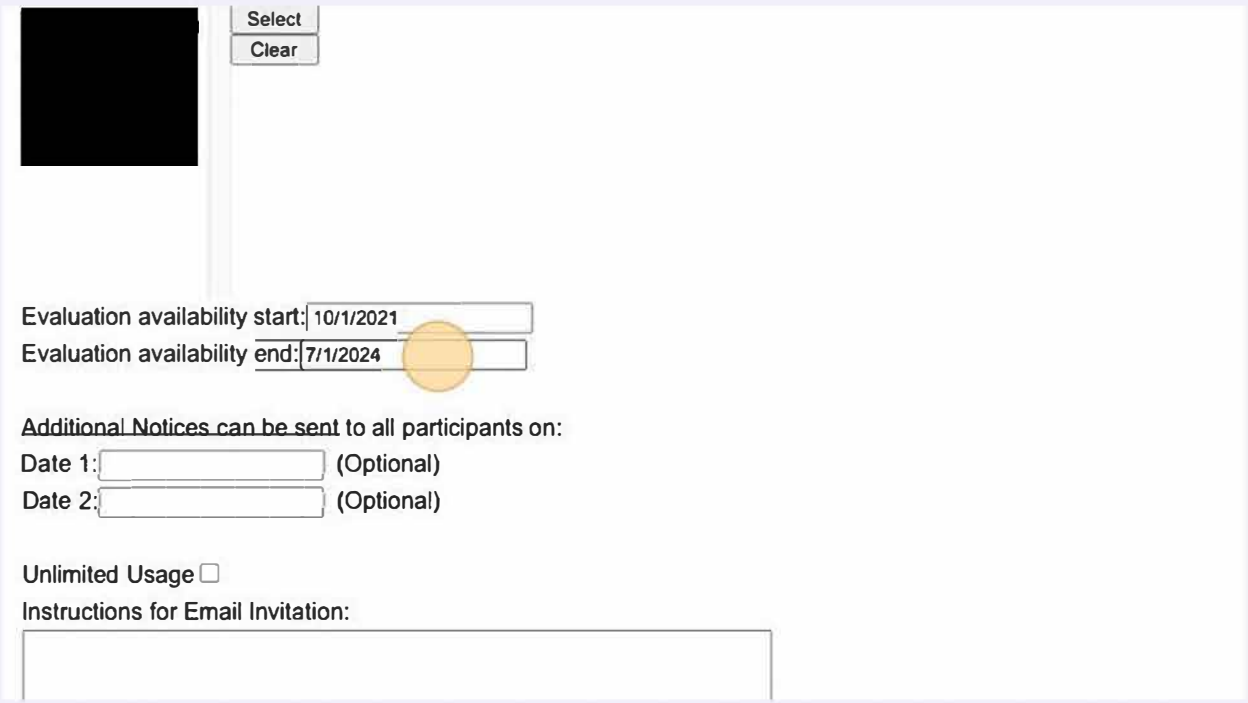
**21** Start with the first one and work your way down.



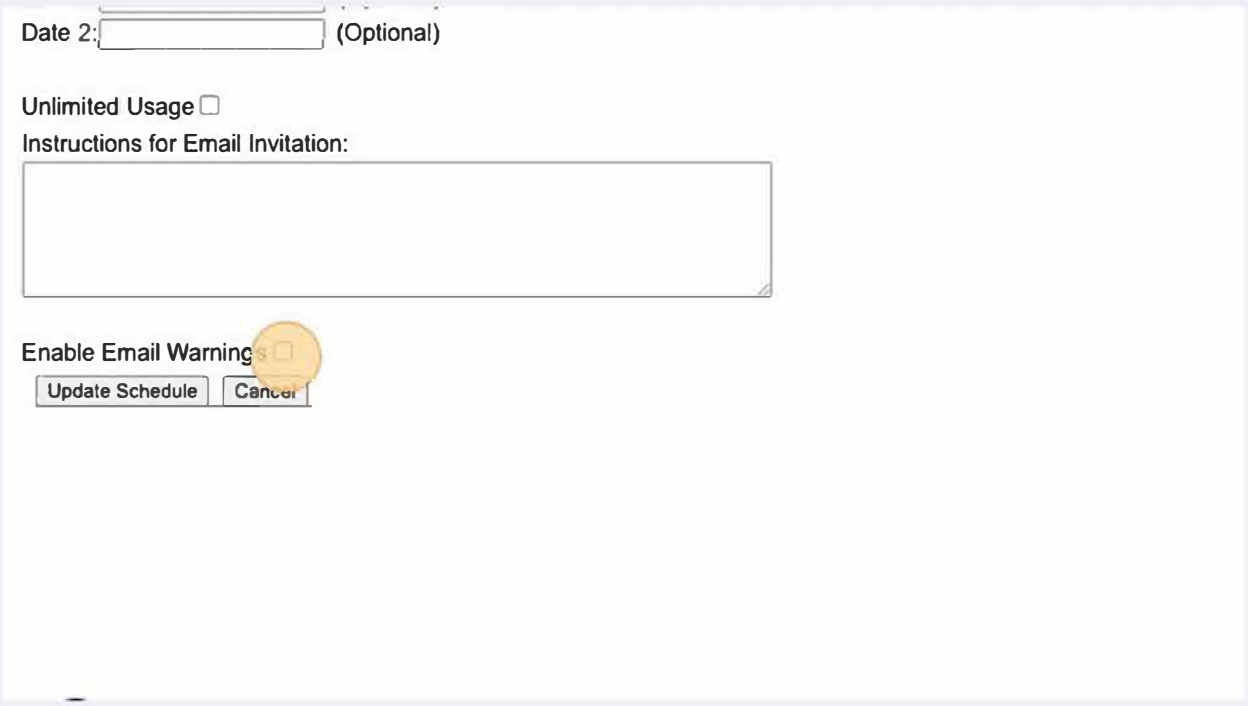

**22** Click "Edit"



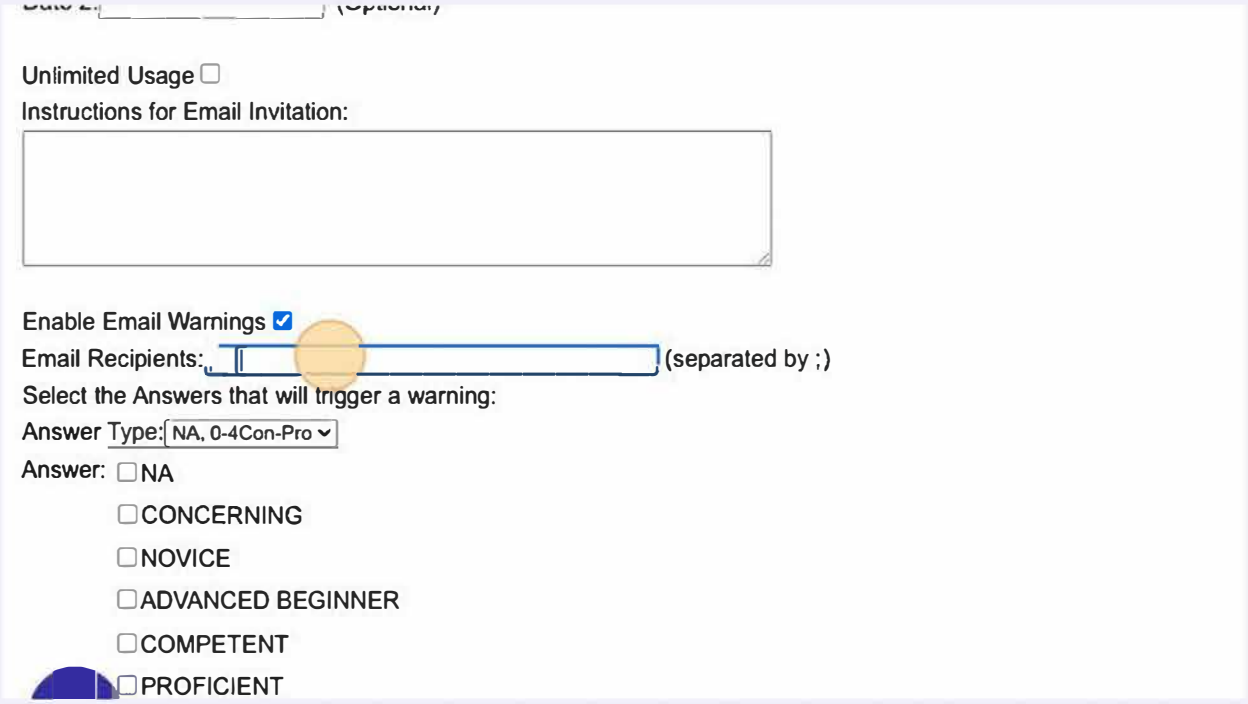
**23** Change the date to the end date of the junior class.



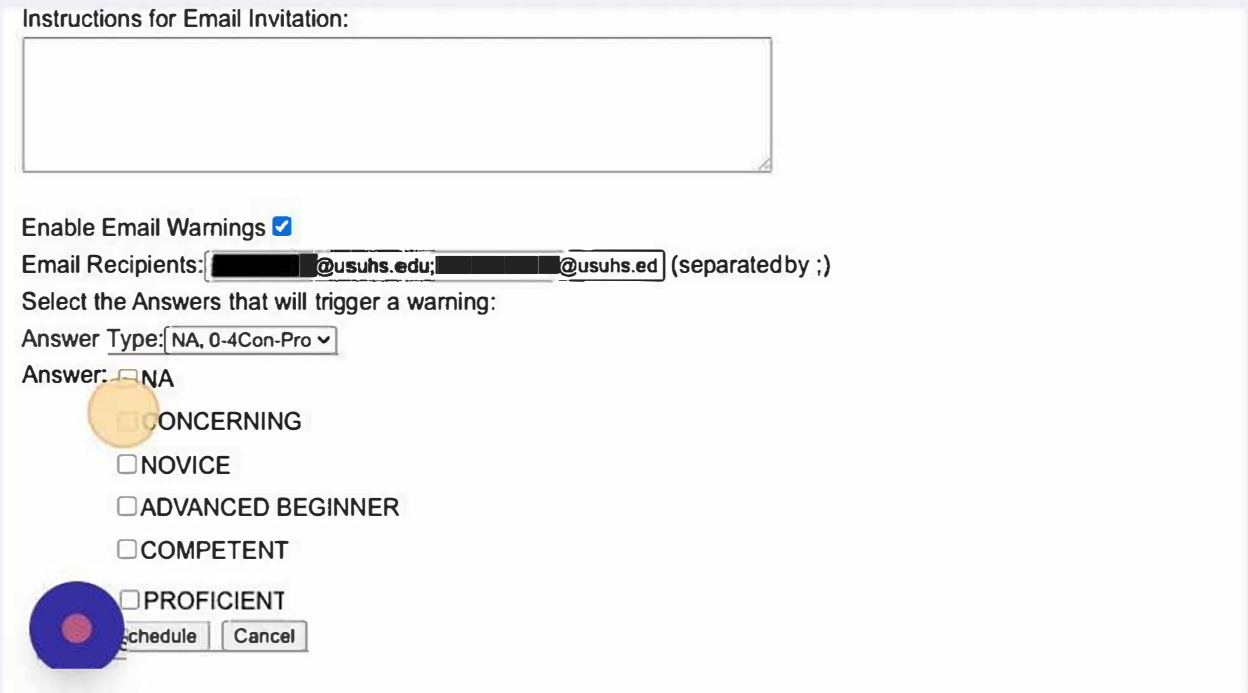

**24** Click the "Enable Email Warnings" field if it is not enabled.



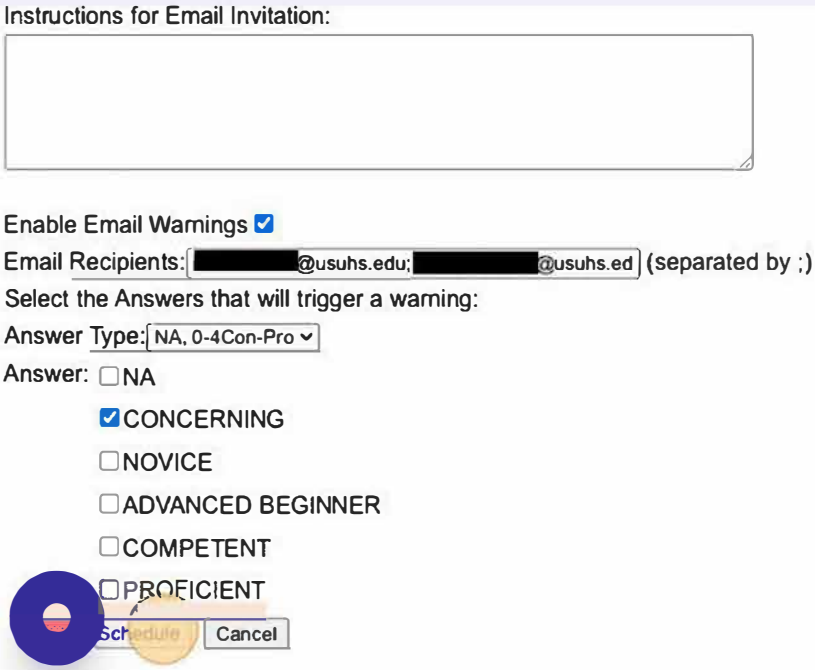
25 Enter semicolon separated values for the site director and director of clinical education as before.



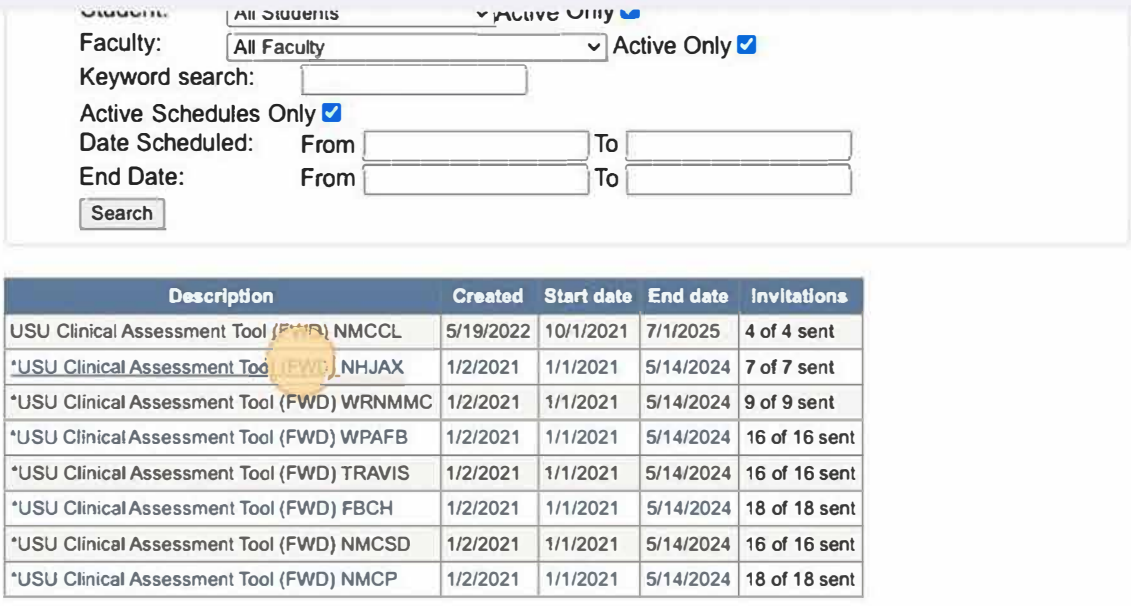

26 Click the "CONCERNING" field.



## 27 Click this button.

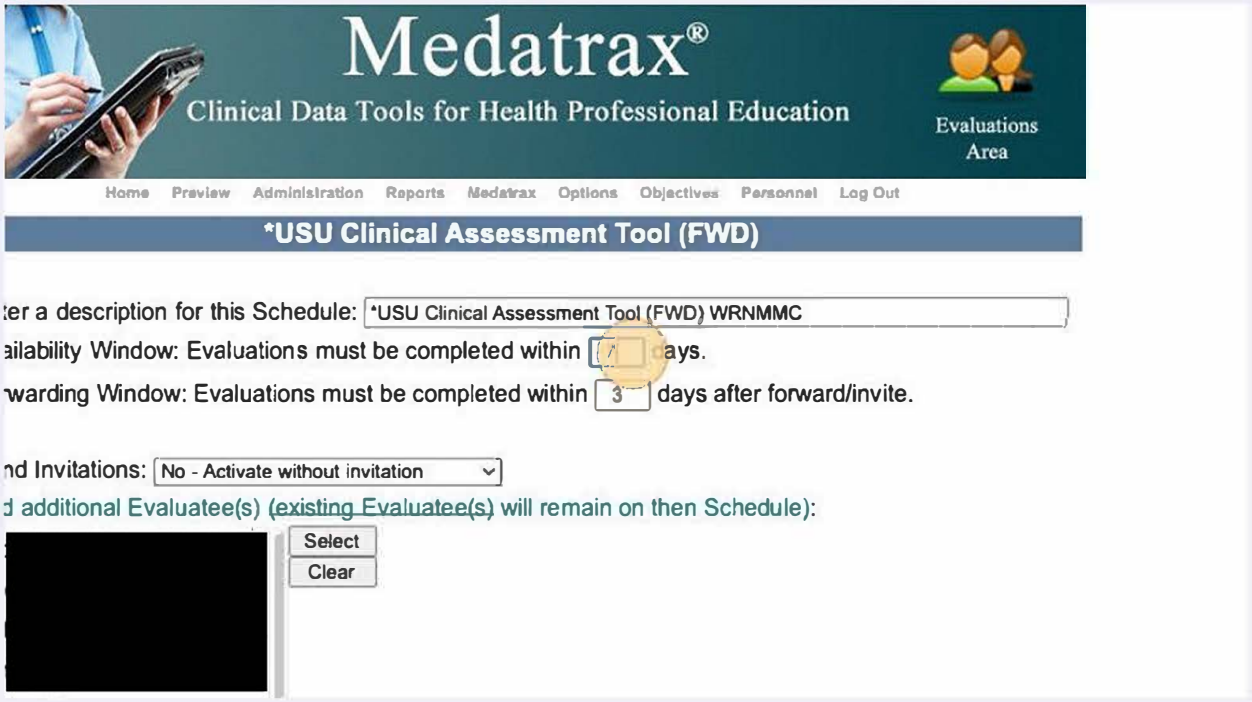


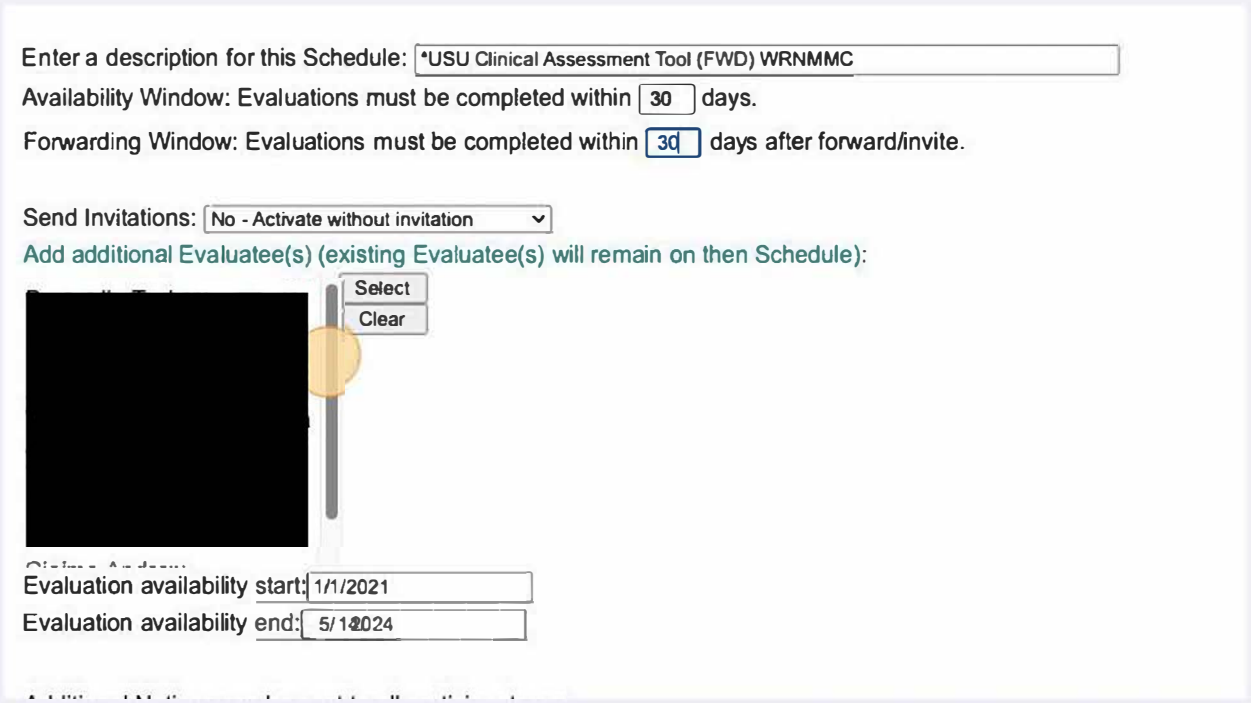

## 28 Start over for the next site.




| 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.




**30** Click here.