

OASIS In-Depth Coordinator Guide: Evaluation

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MANAGING USERS

Creating User Accounts:



Before anyone can begin to use the OASIS evaluation system, an account must be created for them. To create an account in OASIS, contact Traci Dougherty or Jennifer Lapin with the user's name and email address. Once an account has been created the new user will receive an email with log in information and instructions for using Oasis.

At the beginning of each academic year an OASIS account will be created for new users. In order to receive an account, new residents/fellows must have a Pennkey.

Student schedules will not be loaded from New Innovations if they do not have an account. Once they obtain a Pennkey, it will be the coordinator's responsibility to contact the OEA to obtain an account for the trainee and then to manually enter their schedule information into OASIS.

For questions regarding Pennkey or to re-set Pennkey passwords go to <http://www.uphs.upenn.edu/pennkey/reset/index.html>.

Pennkey passwords cannot be re-set within Oasis.

Viewing Account Information:

Any OASIS user's account information is readily viewable in Oasis including: username, password, external id (Penn Id number) name, and email. In order to update a user's email address, go to the User menu and choose **Edit User**.

By searching in account information for a particular person, you can quickly tell if they have a user account in the system and if their email address is up to date. It is the coordinator's responsibility to ensure their user's email addresses are up to date.

Please see the Quick-start Guide for step-by-step instructions on how to view account information.

Editing Account Information:

Changes should never be made to a user's username and password by a coordinator.

It is important that the email address of each user be up-to-date. The OASIS system sends automated weekly emails to remind users about outstanding evaluations. If a user's email address is wrong, they will not receive these emails and may not know they have evaluations to complete.

Please see the Quick-start Guide for step-by-step instructions on how to update a user's email address.

Logging into OASIS as another user:

Logging into OASIS as another user allows you to see what that user sees in the system, including their evaluation assignments; it can also be helpful for trouble shooting problems. Logging in as a faculty member will immediately take you to their main evaluations page, where you can see outstanding and completed evaluations. Logging in as a student will take you to a schedule of the resident/fellow's enrolled courses within OASIS. Above their student schedule, there is a link to access their evaluations main page.

Please see the Quick-start Guide for step-by-step instructions on how to enter OASIS as another user.

Loading Student Schedules:

The OEA Office handles the loading of resident/fellow schedules from NI to the OASIS evaluation system. Emails keep coordinators up to date throughout the schedule loading process.

Changing a User's Role:



Contact the OEA to change a user's role from student to evaluator or evaluator to student.

Modifying a Student's PGY level:

Contact the OEA to change a student's postgraduate year (PGY) level. A Resident/Fellow's year in their program (represented in OASIS) and year since their graduation (represented in New Innovations) are two different concepts; these levels do not always match between what appears in New Innovations and what appears in OASIS. It is important that the coordinator know what PGY level their users are in OASIS.

Having the correct PGY information in OASIS is important only when evaluation forms differ by PGY year.

Sending User Login information:

The OEA sends log in information via email to residents, fellows, and faculty and, when necessary, can re-set Oasis passwords.

MANAGING COURSES*

**The OEA handles course enrollment set-up and roster loading at the beginning of the academic year.*

When adding a student to the roster, you must search for them by PGY level.

Creating a course:

A course is created in OASIS for each rotation that a Program would like to have its' residents/fellows evaluated upon. Each new course created in the OASIS evaluation system must be assigned a course name, as well as a course ID. Information about new courses needed is gathered from the resident/fellow schedules in New Innovations, as well as through consultations with Coordinators. The creation of new courses is handled by the Office of Evaluation as the office has certain conventions for numbering OASIS course IDs.

Course catalog information:



Upon creation, each new course in OASIS is assigned course title and Id number by the OEA. This information is referred to as the Catalogue information. It is viewable in each course, as well as in the OASIS course catalogue. Course catalogue information is also editable but should never be changed by the Coordinator.

Configuring course enrollment set-up:



After each new course is created, it must be configured before residents/fellows can be added to the course roster and evaluation forms can be assigned. The course enrollment set-up includes: making the course viewable in the course catalogue, specifying at least one course location, configuring the start and end dates, setting enrollment limits, and checking course overlap.

Making a course viewable:

All courses must be made viewable in the OASIS Course Catalogue. Residents/fellows can not be added to course, nor can the course be seen by other users, if is not viewable.

Editing course locations:

OASIS refers to rotations as courses. Each course in OASIS must be assigned a location, as evaluation forms are attached to course's location assignments. Courses can be given multiple locations and have different evaluation forms attached to each one. Generally, all the courses in the OASIS system operate on "All Locations." Some programs utilize course locations to assign PGY or location specific evaluation forms. A coordinator should never need to change a course's location.

Configuring Start and End dates:

Each course in OASIS must be pre-configured with allowable start and end dates before residents/fellows can be added to course rosters for those dates. Course set-up is handled by the OEA and this information is taken from the resident/fellow schedules in New Innovations, as well as through consultations with Coordinators.

Setting Enrollment limits:

Enrollment limits are set for each PGY year (PGY 1-10) in each course. Generally, the OEA sets the enrollment limits at 150 students per PGY level per course. If the enrollment limits are not set high enough, a coordinator may not be able to add residents/fellows of a particular PGY year to a course roster because the maximum, specified in the enrollment limitations, has already been reached.

Course overlap:

When a new course is being configured in OASIS, it is important to fill in the box for allowing course overlap. This box should be checked for each

course in OASIS. Checking course overlap allows residents/fellows to be loaded into course rosters for overlapping start and end dates. Thus, residents/fellows who spend each week within a block on a different rotation can be evaluated in each rotation for the same start/end date. Course set-up is handled by the Office of Evaluation and Assessment at the beginning of academic year.

Course roster:

In order to be evaluated, residents/fellows must first be added to the course roster. Residents/Fellows are added into the rosters with specific start dates. Course start dates are defined in the course set-up process using rotation schedules in NI, but they can also be specified at any time within the course roster, as custom start dates. Creating a custom start date will prompt a warning message from the OASIS system to remind you that you are doing something custom, and there is an override button for you to click on. Residents/fellows can be added to/dropped from the course roster at anytime. You can also modify a resident's start dates within the roster. Roster loading is handled by the OEA at the beginning and middle of academic year.

Course rosters list: students' name, a link to their schedule, student level, location, weeks, credits, etc.

After the initial loading of resident schedules by the OEA, it is the Coordinator's responsibility to manage any additional changes to the roster, start dates, etc.

Please see the Quick-start Guide for step-by-step instructions on how to add, drop or modify a student on the course roster.

MANAGING EVALUATIONS

Coordinators monitor the assignment and completion of evaluations.

Assigning Evaluations:

Once OEA completes the course enrollment set-up, course roster loading, and evaluation form assignments, each coordinator can enter OASIS and make evaluation assignments. Coordinators make these assignments on the Manage Evaluators screen. In order to make an evaluation assignment, both resident/fellow and evaluator must have accounts in the OASIS system. Evaluations in OASIS are generally assigned to go both directions, where a resident/fellow evaluates a faculty member and vice versa. Evaluation assignments, however, can also be set up one-sided, where only a resident/fellow or only a faculty member is evaluated.

IMPORTANT NOTE: in the event that red dots appear on the Manage Evaluators screen contact the OEA immediately, they indicate an assignment problem.



Please see the Quick-start Guide for step-by-step instructions on how to assign evaluations.

Viewing Evaluations:

After evaluations have been assigned, coordinators need to check the Search and Edit Evaluations screen to be sure that their evaluation assignments are correct. The

The evaluations will appear grouped by start date (defaultly), the title entries will appear bolded, black and in a bigger font.

majority of the coordinator's work within OASIS will be spent viewing evaluation assignment and completion. Within the screen Search and Edit evaluations, evaluations are sorted by start date. In order to change the sorting and see additional information, select "Modify View." Individual completed evaluations are available for viewing on this screen, as well as the status of all assigned evaluations within the rotation. A legend of colors is provided for understanding different evaluation statuses.

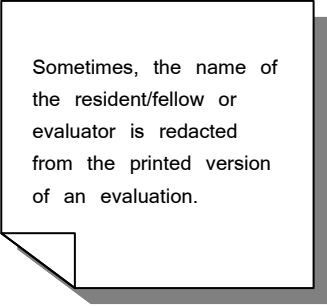
Please see the Quick-start Guide for step-by-step instructions on checking and managing evaluation completion, as well as viewing additional information on the Search and Edit Evaluations screen, such as start and close dates and number of reminders sent.

Editing Evaluations:

Often, last minute changes in scheduling, such as maternity leave, etc, affect evaluations already assigned in the OASIS system. Coordinators have to re-assign, delete, and inactivate evaluations as needed throughout the year.

Please see the Quick-start Guide for step-by-step instructions on inactivating evaluations.

Printing Evaluations:



Sometimes, the name of the resident/fellow or evaluator is redacted from the printed version of an evaluation.

Coordinators are often required to maintain paper records of evaluations. Evaluations are available for printing in the OASIS system in several different formats; individually, in aggregate by person, or aggregate by program. Completed evaluations of residents by faculty are also available individually in PDF format. When printed, evaluations are stamped with the date and time of printing.

Please see the Quick-start Guide for step-by-step instructions on printing completed evaluations from the system.

Managing Evaluation Completion:

The OEA recommends coordinators and program leadership take a pro-active approach to managing evaluation completion. There are several ways in which a program can improve response rates and overall evaluation data collection.

- Evaluation reminders are sent via e-mail by the OASIS evaluation system to each user who hasn't completed evaluations and will contain a detailed list of the outstanding evaluations, as well as an HTTP link to the system. It may be helpful for a Program/Coordinator to send out personalized reminder emails to their residents/fellows about evaluation completion, in addition to those sent out by the system.
- Coordinators can set OASIS so that evaluations can not be inactivated without an explanation provided by the faculty inactivating. This can be a helpful tool in keeping track of incorrect assignments. Generally, an evaluator may explain that they never worked with the resident, but Dr. X

did. Then, you know you need to make a new evaluation assignment and you know the correct evaluator.

- OASIS offers several types of reports that demonstrate evaluation compliance, completion statistics, and include email addresses for ease of mailing. Pulling these reports regularly and providing them to program leadership will create a better picture of evaluation completion.

Consult with the OEA for more about measures that would help with improving response rates.

*Pulling Standard Evaluation Reports/Reports from OASIS:**

*Coordinators must receive additional training to access certain reports; please contact OEA.

The OASIS system provides several different standard reports and evaluation reports that can be pulled by Coordinators whenever need be. Comprehensive summary evaluation reports are often used at the residents/fellows' bi-annual meetings with program leadership. Standard reports should be pulled throughout the year to keep program leadership up to date on evaluation collection.

The following evaluation reports are available:

Evaluation Reports:

Set-up Individual Faculty: Analyze evaluation data about a specific faculty member.

Set-up department faculty: Analyze evaluation data about all faculty members in a department.

Set-up department student performance by faculty: Analyze student performance evaluation data per student completed by all faculty members in a department.

Set-up Student Performance completion report: Analyze statistical data about evaluation form completion by faculty members. (formerly called the Set-up faculty completion statistics)

Set-up Course/Faculty completion report: Analyze statistical data about evaluation form completion by residents/fellows. (formerly called the Set-up student completion statistics)

Set-up individual student: Analyze evaluation data about specific resident/fellow.

Set-up Course Evaluation Report: Analyze course evaluation data across courses.

Reports:

Evaluation Noncompliance Course V2: Gives list of all residents/fellows with outstanding evaluations, along with their email address, and which evaluations they have not yet filled out .

Evaluation Noncompliance Student Performance V2: Gives list of all faculty members with outstanding evaluations, along with their email addresses, and which evaluations they have not yet filled out.

Please see the Quick-start Guide for step-by-step instructions on pulling the different reports that OASIS provides, including aggregate data, individual forms, completion statistics, non-compliance, etc.

*Opening/Viewing Evaluation Reports:**

*Coordinators must receive additional training to access certain reports; please contact OEA.

Evaluation reports requested from the Oasis system are available in several formats: PDF or tab-separated. In most instances, PDF is the report that would be preferable to you. Tab-separated will send you the evaluation data in a raw format. Tab-delimited files tend to be hard to read. In order to make the data useful, copy and paste into Excel or use Excel to open the document. Depending on what browser you are using, (e.g. Firefox, Explorer, Safari), you may be able to open the file easily and/or are prompted to open the OASIS file with Excel when you downloaded the file. For example, TSV files will prompt you to select a helper application to open the file, such as Excel.

Please see the Quick-start Guide for step-by-step instructions on opening/saving OASIS reports in Excel.

Custom Evaluation Reports

Ad hoc evaluation reports are available from the OEA. Seven-business day's notice is required for all new requests and forty-eight hours for existing custom reports.