

Active Assessment Using Direct Observation

Instructions for Resident-Initiated Assessments in New Innovations

How Residents Initiate an Assessment (via NI app > Evaluations)

1. From app home page (after logging in), select **Evaluations** tile.
2. Select **Request Eval** button. A list of people and evaluations will appear below. There's also a search bar.
3. Select (or search for and then select) the appropriate box that contains:
 - a. the person you want to evaluate you and
 - b. the evaluation form (ex: 'Active Assessment Using Direct Observation')
4. A box will pop up that says:
Request Evaluation
Request **Active Assessment Using Direct Observation** evaluation form from **Dr. (preceptor/faculty name)**
5. Select **Send Request** button
This will send an email to the preceptor but rather than going to email, the preceptor can open their mobile device. When the resident selects the Request Evaluation button, that makes a match so that evaluation for that resident will appear in the preceptors list of evaluations.

How a Preceptor can Evaluate the Resident on their Device (via NI app > Evaluations)

1. From app home page (after logging in), select **Evaluations** tile.
2. Select **New Eval** button. A list of people and evaluations will appear below, as well as a search bar.
3. Select (or search for and then select) the appropriate box that contains:
 - a. the person you want to evaluate
 - b. the evaluation form (ex: 'Active Assessment Using Direct Observation')

Based on the session settings (likely set up by an Admin) the residents could also ask the preceptor to search for the resident's name and the evaluation form ('Active Assessment Using Direct Observation') without the request (because a match has already been made).