1. Go to **Evaluations > Evaluation Forms.**

2. Click to open **External Templates Available.**

3. Check the box **Active**. This makes the "Active Assessment Using Direct Observation" form available to select when you set up an on-demand Session (the next steps).

4. Go to **Evaluations > Add Session.**

5. Name the Session "Active Assessment Using Direct Observation."

6. In the Evaluation Form dropdown, select "Active Assessment Using Direct Observation." (this is the external template you made active)

7. Click **Create New Session**

8. You land in the People tab. In the On-Demand Evaluations box, check **Evaluators** and **Subjects**. Checking Evaluators lets preceptors initiate this assessment on-demand. Checking Subjects lets residents request assessment from an evaluator. Requests appear in an evaluator's inbox, on their New Innovations home page, and in Complete Evaluations.

9. Select **Single Date**. This setting works best for event-based on-demand evaluations.

10. Select Evaluator and Subject Statuses. Each institution has their own unique Statuses to identify everyone's role. Select all the Subject statuses that represent your FM residents and all the statuses that represent the preceptors you want evaluating using this form. You can also include other New Innovations departments in this section. This might be useful if you have a FM program working closely with an FM combined program and the two are different departments in New Innovations.

11. Click **Evaluation Form** tab

12. Under Anonymity Settings, select **None** (this will let residents see their evaluation results and evaluators' names)

13. Click **Match Schedule** tab

14. Check **Auto Copy when this session ends** in the End of Session Settings (so that there's no additional setup next year)

15. Enter "Active Assessment Using Direct Observation" in the **New session name** field

16. Click the red **Save changes** button

17. Under End of Session Settings section, click **Add New Interval**

18. With "Use the [your current AY] Year Calendar" selected, click **Create Schedule.** If you are setting this in between years and don't have an AY created, create one first so that you can select it here and continue. Alternatively, you can set your own time using the option below—make sure to span a full year if you do or this form will only be available on-demand for the period represented (and you probably want it available at all times!).

19. Click **Continue**

20. Give it a few minutes, and those chosen as Evaluators (via Status selection, step 10) should see "Active Assessment Using Direct Observation" available on-demand via **Evaluations** > **Complete Evaluations** > **Choose Subject** on desktop or **Evaluations** > **New Eval** on mobile.