Evaluation Management
December 2022

Introduction

Purpose: This job aid describes how Administrators and Course Providers with the Evaluation Manager role can create, edit, and manage evaluations. It includes images to illustrate key points. Images may differ from the presentation in TRAIN.org.

Access:

- **Course Providers** and **Evaluation Managers** will be able to access the Evaluation Management tools.

Related Inclusions and Enhancements:

- Course providers can choose to offer one evaluation across all credit types and learner groups or offer different evaluations for various credit types and learner groups.

- The checkmark for auto-verification has been removed and replaced with a new process for setting new verification options for the entire course.

Creating a New Evaluation

Go to the Admin menu and select the Content tile. Within Content, click on the Evaluation Management tile.

The next page will display a list of existing Evaluations you can access. Click the Add Evaluation button to the right of the Search field. The button will open an Evaluation Settings page with a number of sections for you to consider.
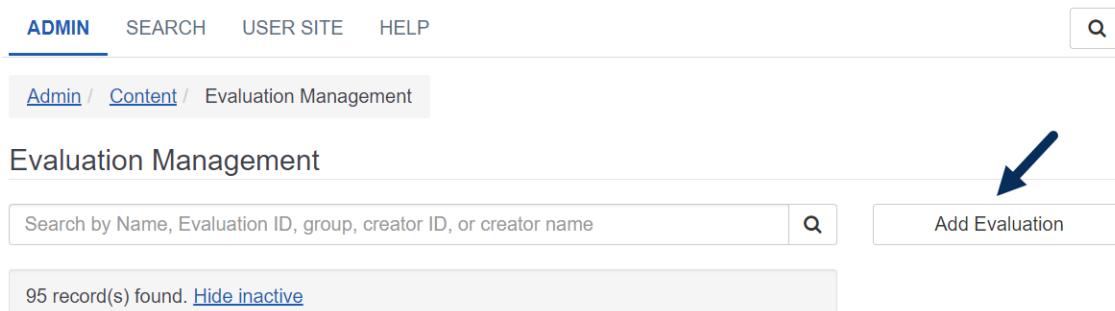
On the Evaluation Settings page, enter a unique title for your evaluation and make additional selections on the page. A screenshot of this page follows the item descriptions.

Anonymous results (optional): If you want the results to be anonymous in reports, check the Anonymous results box.

Date range (optional): If you set a date range, the evaluation will be offered only during that date range. If the evaluation end date passes and the course is still active, learners will be able to complete the course without taking the evaluation.

Availability: The Availability selection controls who will be able to edit the evaluation and/or assign it to their courses. The Availability section will pre-populate with groups to which you belong. These can be removed as needed. Other groups can be added by clicking the Add Group button. Your Availability choice(s) should be based on the extent to which you need to share this evaluation with others. Reach out to your TRAIN administrator for further guidance if you need assistance with your selection.

When you have made all of your initial selections, click the green Save button. You will then move on to creating your questions.

Adding Questions to an Evaluation

After you have saved your initial selections, you will see a review page. The review page offers an Edit Settings button to edit previous selections as well as a dropdown to make your evaluation active when it is complete. Scroll through the review page and you will find additional sections, or use the blue hyperlinks under the title to jump to each section.

In the Questions section, click the button labeled Add Question and begin to make your selections.

Questions (0) → Add Question

There are no questions defined for this evaluation.

There are several types of questions you can choose to use. Each type will have unique requirements for setup. In this document, Check All That Apply has been selected as the example. After clicking the radio button for the selection, click the Next button at the bottom of the page.

Cancel

Add question   (Fields marked below are required)

Workplace Wellbeing Inactive

◉ Choose a question type
  ○ Multiple Choice
  ○ True/False
  ◉ Check All That Apply
  ○ Fill in the Blank
  ○ Rating (Likert scale)
  ○ Essay / Short Answer
  ○ Matching
○ Find and clone a question

→ Next

On the next page, you will be prompted to enter your question text and create your possible answers. In this case, the Check All That Apply question prompts you to enter how many selections the learner can make (answers must be added first). Each question type has varying options and requirements. To add answers, click the Add an answer button.

Cancel   Preview   Save

Add Check All That Apply question   (Fields marked below are required)

Question text

| **B** | *I* | H | ☰ | ☷ | 66 | 🔗 | 🖼 | **Q Preview** |

What did you like most about this workshop?

🖼 Attach an image ❓

Learners can select up to

Answers

☐ Show answer options in a random order

+ Add an answer   ⬅

Type in your answer and click the green checkmark to save it on the page. You can then click the Add button again to create all of your potential answers.

Answers

☐ Show answer options in a random order

The printed guide I can take home

Edit question answer   ❌   ✔

| **B** | *I* | H | ☰ | ☷ | 66 | 🔗 | 🖼 | **Q Preview** |

The group activities

🖼 Attach an image ❓

☐ Other

When completed, the list of answers will display. You can drag and drop the questions into a different order by clicking and holding the 6 dots while moving your computer mouse. To edit or delete answers, use the 3-dot menu on the right.

Answers

☐ Show answer options in a random order

⠿	The printed guide I can take home
⠿	The group activities
⠿	The closing meditation session
⠿	Time for introspection and writing

☑ Edit
🗑 Delete

➕ Add an answer

When you have completed the entries for the question, click the green Save button at the top of the page. You will see the review page again and can scroll down to the Questions section (or use the blue hyperlink) to add as many questions as you like.

You can use two options in the Questions section to move the order of questions or set up a skip pattern. Click on either toggle to enable these features.

Questions (3)   🟢 Move questions   ◯ Edit conditions

Move	#	Question
⠿ ∧ ∨	1	What did you like most about this workshop?
		The printed guide I can take home
		The group activities
		The closing meditation session
		Time for introspection and writing

Skip Pattern Functionality

Skip pattern functionality applies to certain types of questions. Skip patterns allow you to set conditions on the answers that will automatically route the learner through the evaluation.

Questions (3)   ◯ Move questions   🟢 Edit conditions   Add Question

#	Question	Type
1	What did you like most about this workshop?	Check All That Apply
	The printed guide I can take home	
	The group activities	
	The closing meditation session	
	Time for introspection and writing	
2	I would recommend this workshop to colleagues.	Multiple Choice
	Yes Set Condition	
	No Set Condition	

Adding Custom Introductory or Final Text

TRAIN provides general default text when a learner starts and finishes an evaluation. If you would like to create custom messages, use the buttons found in the Advanced Options section of Evaluation Settings.

When one of the buttons is clicked, a text box will display. Enter your custom message and click Apply.

Activating the Evaluation

Once your evaluation is fully constructed, you can use the dropdown at the top of the review page to change its status from Inactive to Active at any time. The evaluation must be active in order for learners to be prompted to take it.

< Back

Workplace Wellbeing

3 questions   0 courses   Advanced options   🔴 Inactive ▾

Active

Inactive

Anonymous Results   No

Availability

Editing, Cloning, or Deleting an Existing Evaluation

You can take several actions on an evaluation by opening the 3-dot menu to the right of the evaluation title.

Evaluation Management

workplace	🔍	Add Evaluation

30 record(s) found. Hide inactive

Name	Questions	Courses	Availability	
Communicating Effectively in the Workplace and in	10	1	National/Arkansas	⋮
JOCO Workplace Safety	5	1	National	
Multi-generational Workplace from Oct 13, 2009 to Oct 21, 2009	30	1	National/Ohio	
Multi-generational Workplace from Oct 13, 2009 to Oct 21, 2009	30	1	National/Ohio	
Impact Mental Illness in the Workplace	10	1	National/Oklahoma	⋮

✎ Edit
👁 Preview

🗐 Clone

☑ Deactivate
🗑 Delete

Adding the Evaluation to a Course through Evaluation Management

You can assign the evaluation to a course while you are in the evaluation itself. To do this, scroll down the review page to the Courses section. Click the Assign to Course button.

Courses (0)   Assign to Course

Not tied to any course

On the next page, click the Select Course button.

Cancel   Save

Assign to course

Workplace Wellbeing Inactive

Course   Assigned to 0 courses.   Select Course

Back   Next

To search for a course, enter the search criteria and click the magnifying glass icon. Select the appropriate course from the results list and click the Add button.

Add courses   ×

wellbeing   🔍

	Title	Organization
☑	Health and Wellbeing	Sentrient
☐	Pyschosocial wellbeing of parents and caregivers	DisasterReady.org
☐	Supporting the Wellbeing of Mental Health	Veterans Health …
☐	Opportunities and Imperfections: Strategies to Support Educator Wellbeing	CDC Partner – A…
☐	Mental health and psychosocial wellbeing of chidlren, adolescents and youth: Part I	DisasterReady.org
☐	Adaptation to Stress: Five Practices to Cultivate Resilience and Work-Life Wellbeing	Region II Public …
☐	Strategies to Support Wellbeing and Retention of BIPOC Staff	Michigan Public …
☐	VDH Northern Virginia: Wellness Workshop - Emotional Wellbeing, Peace of Mind, Meditat…	VDH OEPI
☐	Recovery Approaches and Improving Attitudes for Successful Living	University of Ariz…
☐	Blue Zone Approaches-- Lessons Learned From the World's Longest Living and Active Pe…	University of Ariz…

« ‹ 1 2 3 4 5 6 7 8 › »

Cancel   Add 1 courses

You will see the course associated to the evaluation. If you made an incorrect selection, you can remove it by clicking the red box and searching again. To continue with the setup, click the Next button.

Cancel   Save

Assign to course

Workplace Wellbeing Inactive

Course   Assigned to 0 courses.
                    ❌ Health and Wellbeing

Back   Next

You must identify the evaluation as a pre-content or post-content item. The default selection is Initial Evaluation (post-content). There are additional options to consider in each case. When your selections are made, click the Next button.

The next selection is the availability of the evaluation for specific learner groups. This allows you to offer different evaluations for different groups taking the same course (depending on other course settings). Reach out to your TRAIN administrator for further guidance if you need assistance. When finished, click the Next button.

The final page provides a review of your course assignment selections. You can use the Change link on this or any previous page to make changes. When all selections are finalized, click the green Save button followed by the orange Cancel button to exit the Evaluation area.

Cancel			Save

Assign to course

Workplace Wellbeing `Inactive`

Course	Health and Wellbeing	Change
Type	Initial Evaluation	Change
Availability	National	Change

Adding the Evaluation through the Quick Link in Course Search

You can also associate evaluations to courses through the Course Content area of TRAIN. This section goes through the process of adding an evaluation through the Evaluation Quick Link under the 3-dot menu for the course.

Advanced Mental H

- Edit
- Clone
- Assessment
- Evaluation
- Roster
- Assign Users
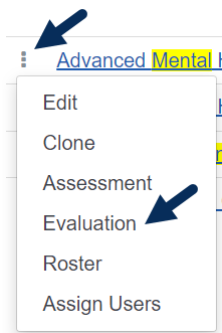
You will start on a page that will show you any previously assigned evaluations. In this example, there are no existing evaluations on the course. Click the Assign Evaluation link to begin.

Course Evaluation

‹ Back

Advanced Mental Health Toolkit for Public Health Practitioners
Webcast (recorded)

No evaluations assigned, please Assign Evaluation

Search for the evaluation you want to associate to the course. Click on the appropriate title on the results list to continue with the process.

Cancel   Save

Assign Evaluation

Advanced Mental Health Toolkit for Public Health Practitioners
Webcast (recorded)

Evaluation   general evaluation   🔍

                        1 record(s) found.

                        General Evaluation

You will see your selection on the next page. Click the Next button to continue.

Cancel   Save

Assign Evaluation

Advanced Mental Health Toolkit for Public Health Practitioners
Webcast (recorded)

Evaluation   ❌ General Evaluation

Back   ⟶   Next

In this example, the course offers various credit types. You can choose to offer a unique evaluation per credit type (depending on other course settings). None is selected by default. If applicable, choose the credit type(s) and click the Next button.

Cancel   Save

Assign Evaluation

Advanced Mental Health Toolkit for Public Health Practitioners
Webcast (recorded)

Evaluation   General Evaluation   Change

Credits   Select all   Unselect all
                        ☐ AAFP
                        ☐ AAA: CEUs
                        ☑ None

Back   ⟶   Next

Make your selection for Evaluation type (pre-content or post-content) and click the Next button.

Cancel   Save

Assign Evaluation

Advanced Mental Health Toolkit for Public Health Practitioners
Webcast (recorded)

Evaluation	General Evaluation	Change
Credits	None	Change

Type
- ○ Pre-evaluation
- ◉ Initial Evaluation
  - ☐ Mandatory
  - **Note:** Initial Evaluations that have a limited Availability Window cannot be made Mandatory
- ○ Follow Up Evaluation

Days to postpone: [   ] days to postpone this Follow Up Evaluation from the day each learner completes the course

Availability window: [   ] days each learner will have to take this evaluation. Once this date period has passed, the evaluation will be removed from the learner's account

Back   Next →

Choose the group(s) whose learners should be prompted to take the evaluation and click the Next button.

Cancel   Save

Assign Evaluation

Advanced Mental Health Toolkit for Public Health Practitioners
Webcast (recorded)

Evaluation	General Evaluation	Change
Credits	None	Change
Type	Initial Evaluation	Change
Availability	Learners from these groups will be prompted to complete this Evaluation	Add Group

Selected groups
✖ National

Back   Next →

Lastly, review your selections, change as needed, and click the Save button when finished.

Cancel   Save

Assign Evaluation

Advanced Mental Health Toolkit for Public Health Practitioners
Webcast (recorded)

Evaluation	General Evaluation	Change
Credits	None	Change
Type	Initial Evaluation	Change
Availability	National	Change

Adding the Evaluation to a Course through Course Edit

You can also add evaluations through Course Edit.
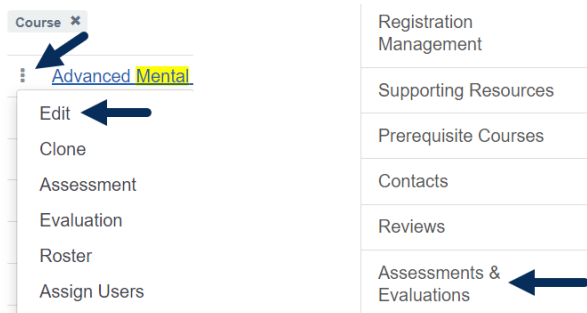
In this workflow, your first choice is related to how many evaluations you need to offer for the course. The first option is to have one (1) evaluation (and/or assessment) that will be used for all credit types and all learners. This is the default selection for new courses created after December 1, 2022.

With the second option, you can offer different evaluations (and/or assessments) for varying credit types and/or learner groups.

Make your selection and then click on the Evaluations button. From this point on, the process is the same as adding an evaluation through the Evaluation quick link in Course Search.

Relationship of Evaluations to Multiple Credit Type Selection by Learners

After December 18, 2022, course providers can choose to allow learners to earn multiple credit types when they take a course. If this option is chosen, TRAIN limits assessments and evaluations to one (1) per course so that learners provide one evaluation and not several.

When you make your choice to allow one or more credit types to be earned, it has a direct relationship to the Assessments and Evaluations settings, and vice versa.

Learners can select more than one credit type to earn = Single Assessment / Evaluation

Learners are restricted to one credit type selection = Multiple Assessment / Evaluation

Settings for Single Credit Type Selection = Multiple Assessment and/or Evaluation

Settings for Multiple Credit Type Selection = Single Assessment and/or Evaluation

If your choices in the Accreditations & Credit section and the Assessments & Evaluations section contradict one another, a message will display and provide guidance on what needs to be considered or changed.

Important note: If you have already assigned multiple evaluations (and/or assessments) to the course and then decide to allow learners to select more than one credit type when they register, the evaluations (and/or assessments) will be removed since TRAIN cannot detect which of them you may want to retain. You will see a prompt to confirm that you want to make

this change. Afterward, you can associate the appropriate evaluation (and/or assessment). Existing registrations will not be affected.

Changes to Course Completion and Verification Options

After December 18, 2022, course providers will have one location in which to set the Course Completion and Verification options for their courses. Previously, there were four locations that offered verification settings (including Evaluation Management), and these often led to confusion and contradiction. The auto-verify option in Evaluation Management has been removed. The screenshots below illustrate the default options available for current course types. Existing courses have been converted to maintain their original settings.

Note: Blended Learning Series verification is dependent on the settings of its included courses

Title	December 18 New External Content Course	

	Completion Options
Common Information	
Availability	○ **Automatic**
Description	Registration move to the next step upon launch
Organization & Sponsor	◉ **Manual**
Content	Registration will stay In Progress until learner completes it manually
Completion & Verification	**Verification Options**
Thumbnail	◉ **Automatic**
	Registration is automatically marked Verified upon completion
	○ **Manual**
	An administrator must verify the learner's completion through the Roster

Title	December 18 Live Event (In Person) (same as Live Event (Online) & Zoom Meeting)	

	Completion Options
Common Information	
Availability	○ **Automatic**
Description	The registration moves to the next step after the Session ends
Organization & Sponsor	◉ **Manual**
Sessions	The registration will stay In Progress until learner completes it manually
Completion & Verification	**Verification Options**
Thumbnail	◉ **Automatic**
	Registration is automatically marked Verified upon completion
	○ **Manual**
	An administrator must verify the registration through the Roster

Title	December 18 Exercise (same as SCORM Course)	

	Completion Options
Common Information	
Availability	○ **Automatic**
Description	This course type completes automatically
Organization & Sponsor	○ **Manual**
Sessions	
Completion & Verification	**Verification Options**
	◉ **Automatic**
	Registration is automatically marked Verified upon completion
	○ **Manual**
	An administrator must verify the learner's completion through the Roster

Note: Exercise and SCORM courses will continue to automatically complete