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. Evaluating - Select People,

7. In the Evaluation Form dropdown, select "Active Assessment Using Direct Observation" - (this form may show that it's LOCKED. That just means it cannot be edited in any way)

8. Email notifications are up to each program. Select Yes or No

9. Signatures are up to each program. Select Yes or No.

10. Click **Create New Session.**

11. You land in the People tab. 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 family medicine residents and all the statuses that represent the preceptors who will be using this form. You can also include other New Innovations departments in this section. This might be useful if you have a family medicine program working closely with a family medicine combined program and the two are different departments in New Innovations.

12. In the **On Demand Evaluations Section** Select which personnel will be able to create their own evaluations. 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.

13. Go to the **Evaluation Form** tab to make sure you have the proper Evaluation Form selected. Select "**Active Assessment Using Direct Observation**" - (this form will show that it's LOCKED. That just means it cannot be edited in any way)

14. The **option** to allow Confidential Comments to the Program Director can be selected. You can also add additional Signatures here if you want, along with Anonymity Settings.

15. Click Match Schedule tab. ADD New Interval. This setting works best for event-based on-demand evaluations. You will need to update your interval to include your entire academic year. To do this you will select Set my own time beginning...here you will add your academic year beginning 7/1/2024 and ending 6/30/2025 (or what your programs dates are for your academic year), split into 1 interval. You will have to update this in the next screen to include only one interval and type in the correct dates. **This will allow the Evaluator to fill out an Evaluation at any time. MAKE SURE YOU HIT SAVE...BIG RED BUTTON on the top right hand side of the page.**

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

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

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

19. 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.