UCSF Continuing Education Portal

Evaluations Report

The Evaluations screen allows users to view, manage, and report on evaluation submissions for a specific activity. From this screen, users can view chart results, raw data, incomplete evaluations, and send reminder emails to learners who have not completed the required evaluations. The data may also be exported for further analysis or to support reaccreditation standards.

This screen is commonly used by CE/CME administrators and coordinators to:

- Review evaluation feedback submitted by learners
- Export evaluation results for internal reports or reaccreditation documentation
- Identify users who have not submitted evaluations
- Send reminder emails to incomplete evaluators

Accessing the Evaluations Report

1. Sign in to the CE Portal; scroll to the bottom to select **Administration**.
2. From the main menu, select **Reports**, then **Evaluations**.
3. Search for and select the activity from the drop-down list.

Loading time may be extended for evaluations that contain many questions or responses.

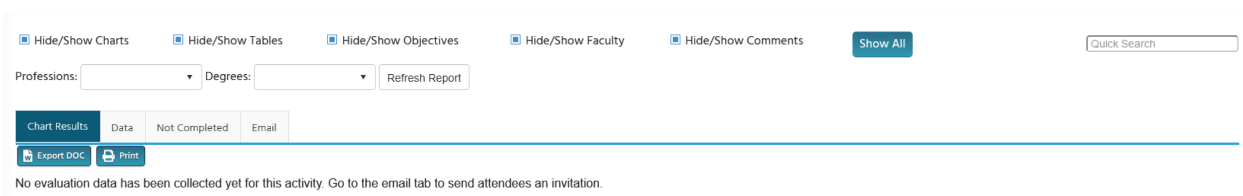


Figure 1. Sample Evaluation Results Filter Screen

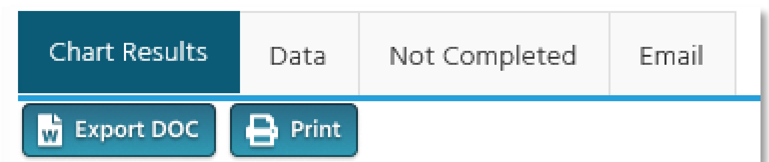
Chart Results Tab

This tab displays evaluation data in both chart and table formats. This is the default "Evaluation Summary Report." You may filter what is displayed by choosing to show or hide specific elements, such as:

- Charts
- Tables
- Objectives
- Faculty
- Comments

Click the **Show All** button to display all available information. Evaluation questions with drop-down answers will appear in chart format. If any comments were submitted during the evaluation, a Comments data table will also display.

You can print or export a Microsoft Word Document from this tab.



Data Tab

This tab displays individual evaluation submissions, including the member's name and ID. Use this section to review raw evaluation data in detail.

1. Click the **Data** tab.
2. Click the **Export XLS** button to download the results in Excel format.
3. Save the file to a secure location for further review or archival.

Not Completed Tab

This tab lists all members who have been assigned the evaluation but have not yet submitted it.

1. Click the **Not Completed** tab.
2. The screen will display the name, email, and attendee type (e.g., physician, non-physician) for each pending user.
3. Select a user by clicking their name in the list.

The number of users who have not completed the evaluation appears in parentheses next to the Not Completed tab label. This list is exportable to Microsoft Excel.

Email Tab

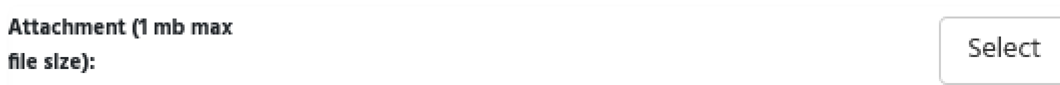
Use the Email tab to send reminders to users who have not completed their evaluation.

1. Click the **Email** tab.
2. Compose your message to the selected users. Hints for using the WYSIWYG ("What You See Is What You Get") editor are at the end of this guide.
    1. The following table presents potential tokens (merge fields surrounded by {curly brackets}) you can use to enhance the default template if desired:

Merge Field Name	Merge Field Definition
{ActivityCode}	Activity code as specified in the Activity Editor > Core Options > Basic Information tab
{ActivityName}	Activity name as specified in the Activity Editor > Core Options > Basic Information tab
{Agenda}	Activity name, Date, Presentation Name, Start and End time, Faculty, Session name and Room
{Degree}	Recipient's degree as specified in their profile
{EmailOptOut}	Link to opt out of marketing emails sent through CloudCME
{EndDate}	Activity end date as specified in the Activity Editor > Core Options > Basic Information tab (Ex: 01/05/2025)
{EndTime}	Activity end time as specified in the Activity Editor > Core Options > Basic Information tab (Ex: 09:00 AM; Friday, December 5, 2025)
{EvalLink}	Link to the Evaluations and Certificates page in the Attendee Portal
{EventDate}	Activity start date as specified in the Activity Editor > Core Options > Basic Information tab (Ex: 1/5/2025)
{EventID}	The activity ID
{EventName}	Activity name as specified in the Activity Editor> Core Options > Basic Information tab
{FacultyLoginDetails}	Link to the Attendee Portal, username and password reset link. The password reset link must be used for non-SSO users only
{FullName}	Full name of the recipient (Salutation, First Name, Middle Initial, Last Name, Suffix, Degree, Professional Designations) as specified in their profile
{LastName}	Recipient's last name as specified in their profile
{LoginDetails}	Link to the Attendee Portal, username and password reset link. The password reset link must be used for non-SSO users only
{MiddleInitial}	Recipient's middle initial as specified in their profile

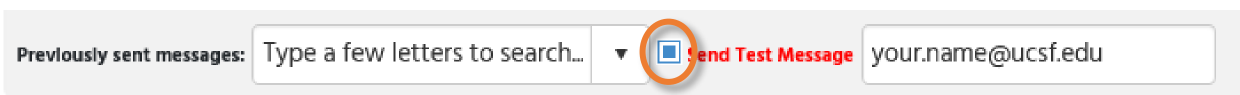
{OrganizationName}	Recipient's organization name as specified in their profile
{Salutation}	Recipient's salutation as specified in their profile (Ex: Mr., Mrs.)
{StartDate}	Activity start date as specified in the Activity Editor > Core Options > Basic Information tab (Ex: 01/05/2025)
{StartTime}	Activity start time as specified in the Activity Editor > Core Options > Basic Information tab (Ex: 09:00 AM; Friday, December 5, 2025)
{Suffix}	Recipient's suffix as specified in their profile (Ex: Jr., Sr., III)

    2. You can also attach a file up to 1MB.



    3. If you don't find your name in the **Reply To Email** dropdown, select "ocmeinfo.som@ucsf.edu."

3. Send a test message to yourself to verify links and formatting. When sending a test, a random recipient will be selected for the preview.

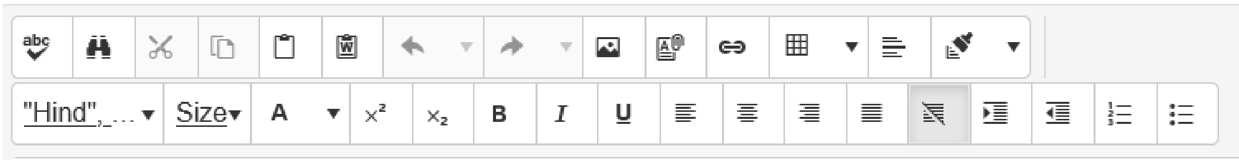


4. After reviewing the test message, uncheck the **Send Test Message** box.
5. Click **Send**. A summary of emails sent will appear at the bottom of the screen.

Note! Do not use the email function for Online Activities or Enduring Materials unless a custom online evaluation has been created. If the default Universal Evaluation is used, this may result in thousands of emails being sent unintentionally.

WYSIWYG Editor Tools

Hover your mouse over the icons for tooltips.



From top to bottom, and left to right:

1. Perform spell check
2. Find and/or Replace
3. Cut text
4. Copy text
5. Paste text
6. Paste from Word
7. Undo
8. Redo
9. Image Manager
10. Document Manager
11. Link Manager
12. Table
13. Horizontal Rule (line)
14. Format Stripper (select options to unformat)
15. Font Name
16. Font Size
17. Foreground Color
18. Superscript
19. Subscript
20. Bold
21. Italic
22. Underline
23. Align Left
24. Align Center
25. Align Right
26. Fully Justify
27. Indent Left
28. Indent Right
29. Number
30. Bullets