Graduate Program Director

ACEND Competency User Guide

March 12, 2024

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Competency Program Director User Guide

Welcome to Competency, a software product created by Education Management Solutions, LLC (EMS). This powerful platform assesses and tracks student and intern performance across competencies, skills, knowledge requirements, performance indicators, and interactions with populations, disease states, and diverse cultures. ACEND program directors can centrally combine and analyze learning performance data from various assessment systems, manage supervised practice rotation schedules, and obtain deliverable data for ACEND accreditation requirements such as maintenance of the program's student and intern hours tracking records and ongoing review of the program's curriculum to help meet accreditation standards.

Competency allows preceptors and faculty (assigned in a preceptor role) to evaluate students and interns with rubrics or checklists, verify and track supervised practice hours, and provide rotation schedule availability. Students and interns can submit supervised practice hours for approval and track their performance on knowledge requirements, competencies, and performance indicators throughout the program.

ACEND implemented this software based on requests from program directors for assistance with streamlining competency tracking. All accredited programs will have access to the system, and it is optional to implement. ACEND's expectation is that this software will help programs streamline competency tracking, assist in identifying at-risk learners, and help programs adhere to curriculum data collection requirements as noted in the ACEND Accreditation Standards. We hope that you will find value in its many beneficial features; however, please be aware that Competency is not a Learning Management System (LMS).

Competency is intended for program directors' individual use related to program management. While contact information may be added within the software, ACEND records and internal database systems are separate from this software. For any programs that need to update their contact information such as program director changes or address updates, please follow the necessary procedures found on the ACEND website at https://www.eatrightpro.org/acend/accreditation-standards-fees-and-policies/acend-policies-and-procedures

1. Program Director Role (Overview)

Competency allows for several roles within the solution. The ACEND Program Director role is assigned to a specific program and can create, edit, and manage program schedules, users, and assessment data. Competency is pre-loaded with reporting items specific to ACEND. However, the Program Director may also add program specific reporting items for tracking within Competency. A Program Director may also have a secondary preceptor role that functions for both a faculty or preceptor.

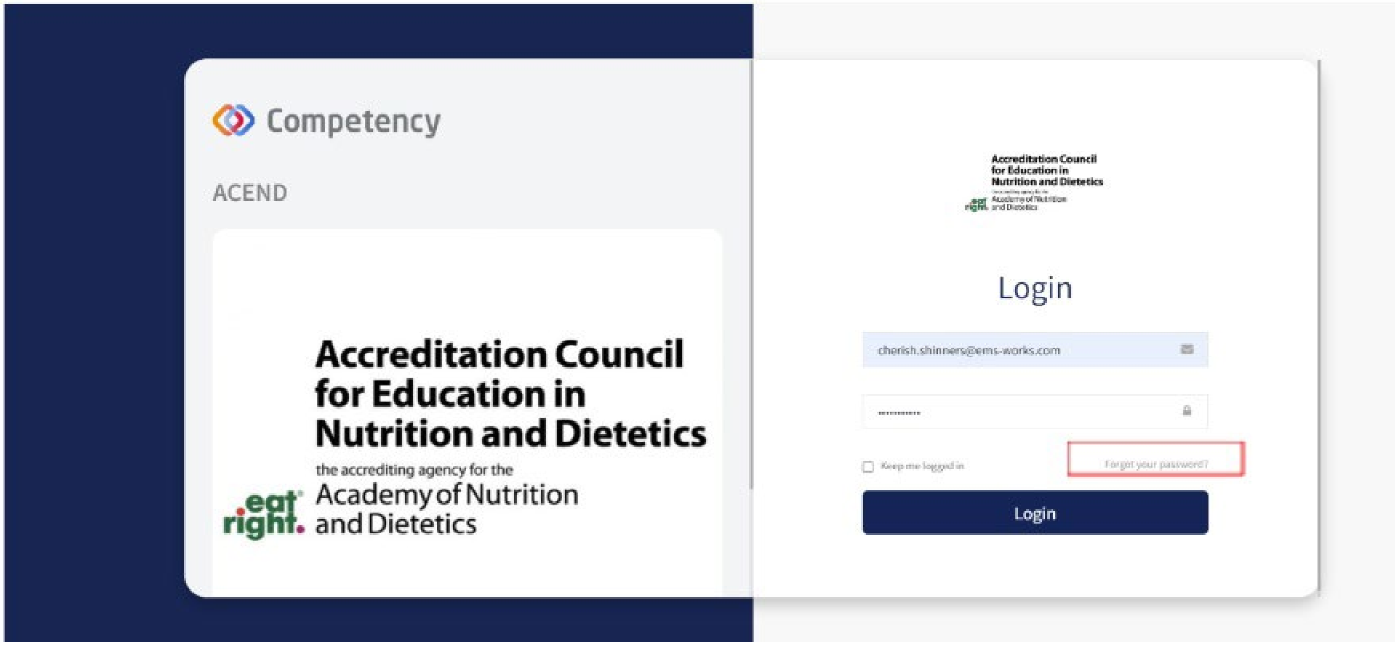
1a. Program Director Login

Program Director accounts are created by an ACEND Competency Administrator. Program Directors will receive an email from Competency with a prompt to create a unique password. ***Note***: You may need to check your spam folder to ensure you receive this account information.

If you have not received an email inviting you to create a password, please contact your ACEND Program Administrator by emailing education@eatright.org. Be sure to include your first and last name, program name and the email address you would like to use for access to the site.

To access the website, use the following ACEND Competency URL: **https://ACEND.Competency.ai/login**

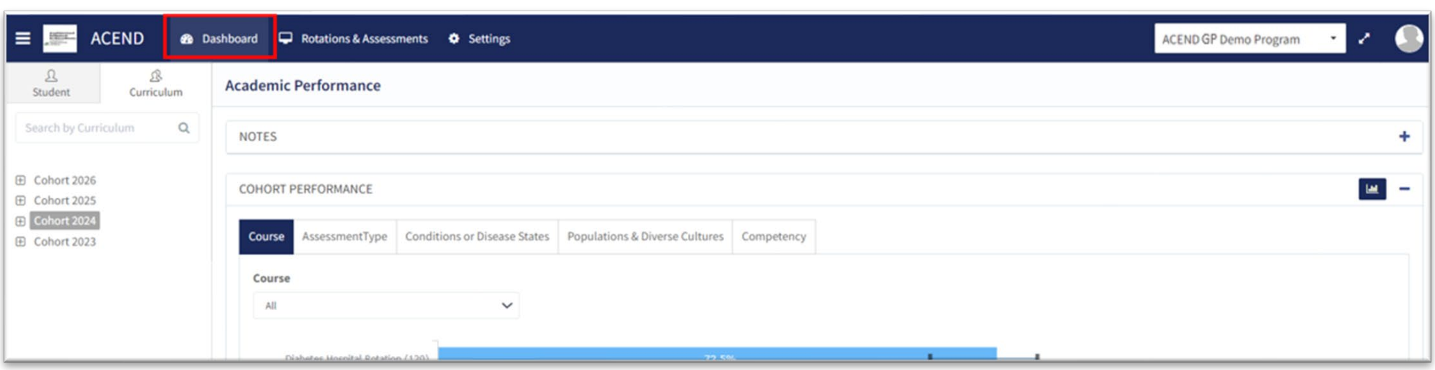
Log in to Competency with your email address and password. If you forgot your password, click **Forgot your password?** to reset.



1b. Program Director Dashboard

__Dashboard Tab__

The interactive dashboard appears when the Program Director logs in to Competency. When your program starts collecting and mapping data, the information will display on the dashboard. Initially, the dashboard is blank.



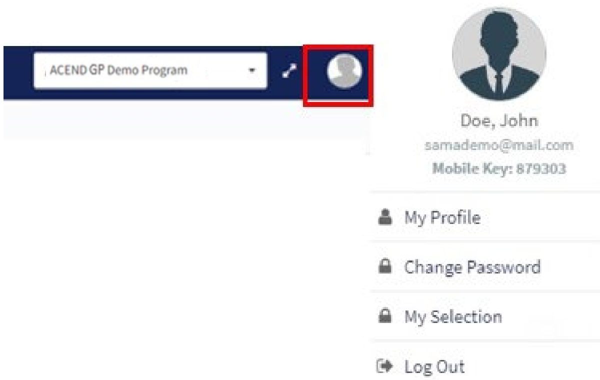
Dashboard Navigation Tips

Click to show/hide:

- **Student tab:** select, search for or view all learners
- **Curriculum tab:** select, search for or view by curriculum type

User Profile

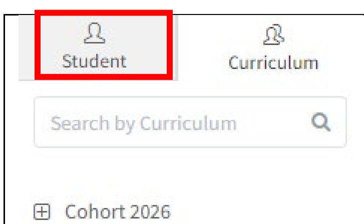
Click your **User Profile** in the upper right of the screen to:



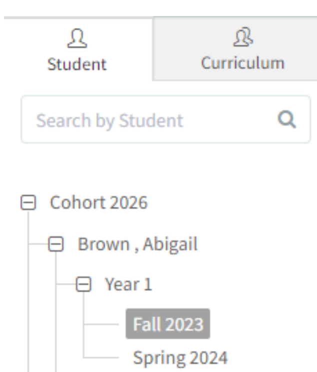
- Update your user profile
- Change your password
- The **My Selection** tab is disabled
- Log Out

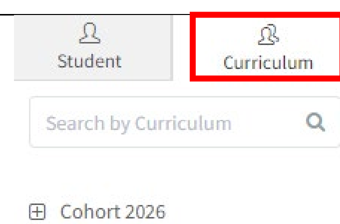
Student/Curriculum Tabs

You can view student data in one of the following ways:

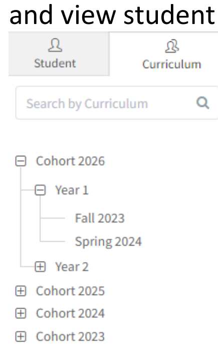


From the left navigation pane, click the **Student** tab and then select the **Cohort**, **Student**, **Year,** and **Term** to search for and view student data:



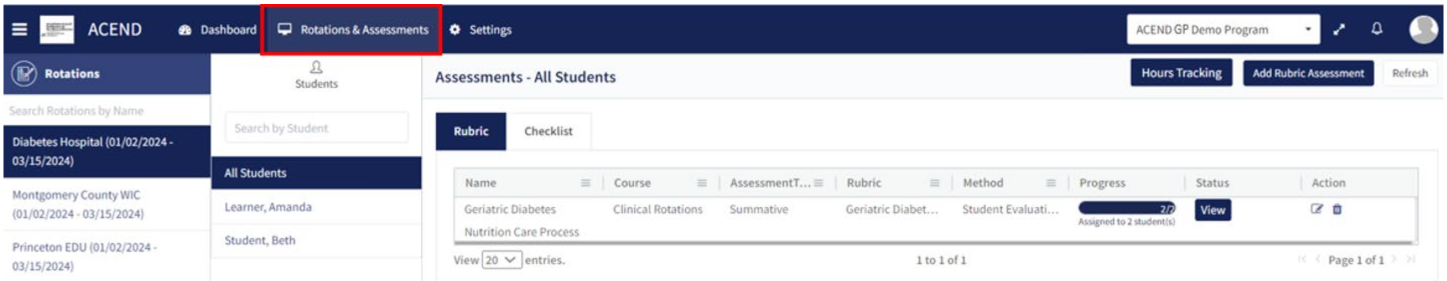


From the left navigation pane, click the **Curriculum** tab and then select the **Cohort**, **Year** and term to search for and view student data:



1c. Rotations & Assessments Tab

The Rotations & Assessments tab enables Program Directors to assign, score, and review rubric assessments and hours tracking.

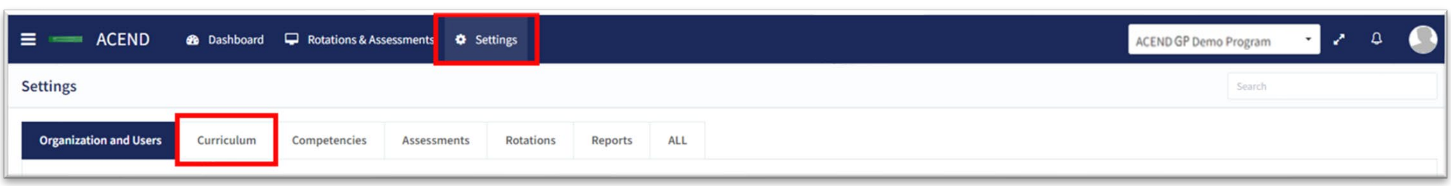


1d. Settings Tab

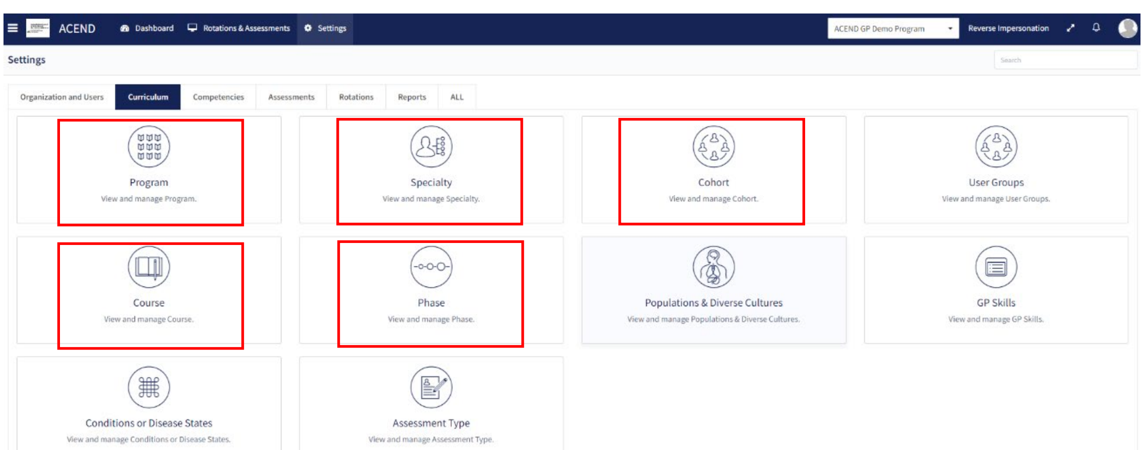
The **Settings** tab provides Program Directors access to multiple administrative functions. These functions allow the Program Director to create, edit, and maintain the essential functions and features of Competency. Preceptor Roles (includes Faculty) and Student Roles DO NOT have access to Settings.

2. Build the Academic Program Schedule

Competency provides a framework for your progam to build an academic schedule. Competency progression cannot be mapped until academic Cohorts (Ex: Class or 2026), Phases (Ex: Program Year 1), and Blocks (Ex: Fall Semester 2023) are built in the system.
Click **Settings** > **Curriculum.**



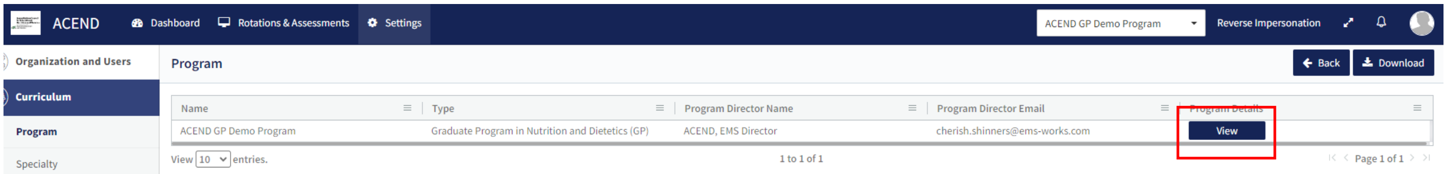
Competency has the flexibility to fit many program types. You may or may not need or wish to use all of the options available for creating your academic program schedules; however, the mandatory fields that MUST be completed to successfully map items in Competency are Program, Specialty, Cohort, Course, Phase, and Block (fall under the Phase).



2a. Program

Click **Settings > Curriculum > Program > View.**

The basic details of your program have been created by ACEND administrators. Please verify your Program Name and Program Type as well as the Program Director name and email. Click **View** to explore and edit program details. Complete the information in the program information fields and **Save** your program information.



Review and Edit Your Program Details

Some items may not be updated or changed by a program director. If the Program Name, Program Type or Program Director information is *incorrect* for your program, please contact ACEND by emailing education@eatright.org. While contact information such as address and phone number may be added within the software, ACEND records and internal database systems are separate from this software. For any programs that need to update their contact information such as program director changes or address updates, please follow the necessary procedures found on the ACEND website at https://www.eatrightpro.org/acend/accreditation-standards-fees-and-policies/acend-policies-and-procedures.

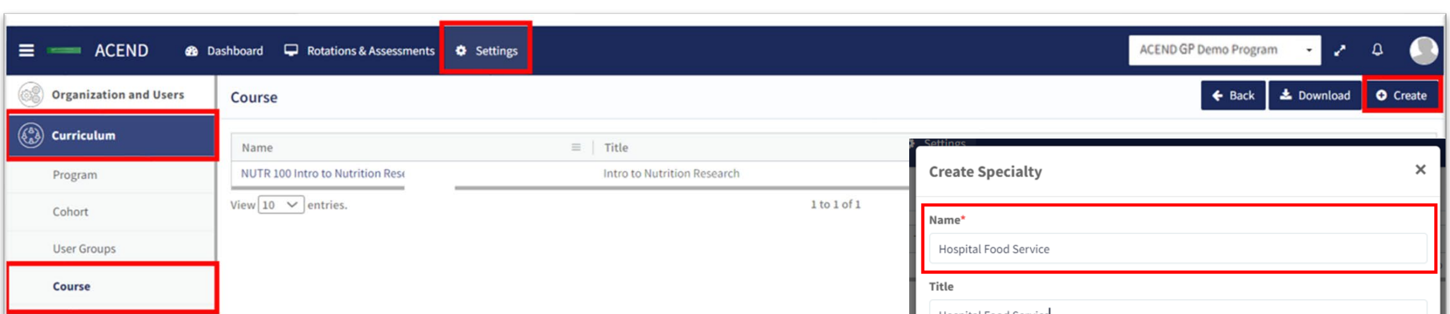
2b. Specialty

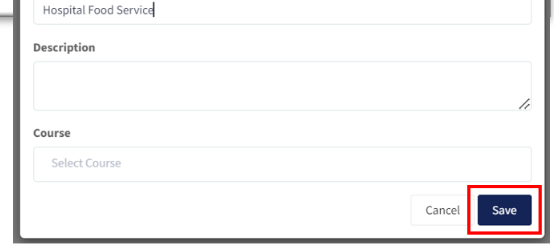
Click **Settings > Curriculum > Specialty > Create.**

Specialty is a mandatory field when creating rotations. The specialties you create now will create a specialty dropdown menu when you build rotations. This list of specialties is unique to your program. For programs building rotations, you can think of the Specialty as the major rotations (Food Service, Clinical, Community, etc.) in which the rotations will be housed. For programs building courses that have rotations, utilize the same approach to build your professional courses by creating a rotation for that course.

2c. Course

Click **Settings > Curriculum > Course > Create**

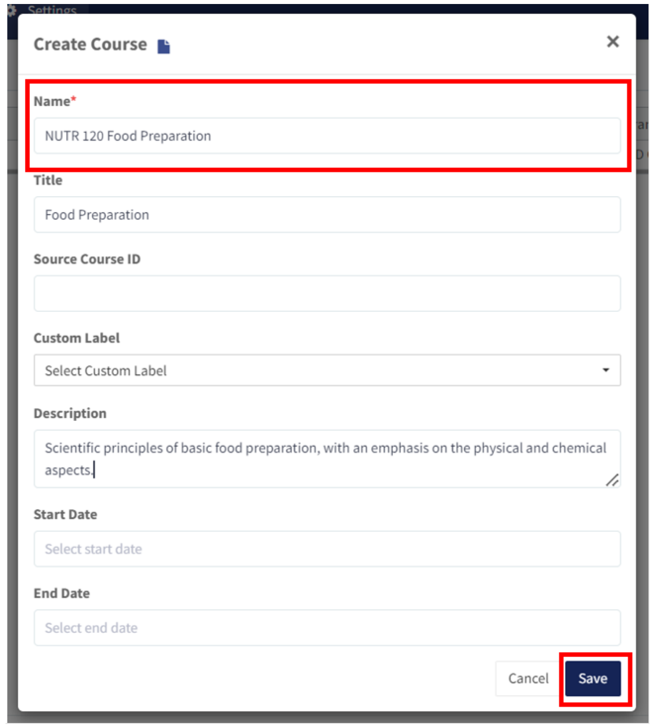




The course names created under the **Course** tab will populate the dropdown menus used to assign checklists, rubrics, rotations or imported grade results to a specific course. Course names can be reused for different cohorts, phases and blocks. For example: Nutrition Science

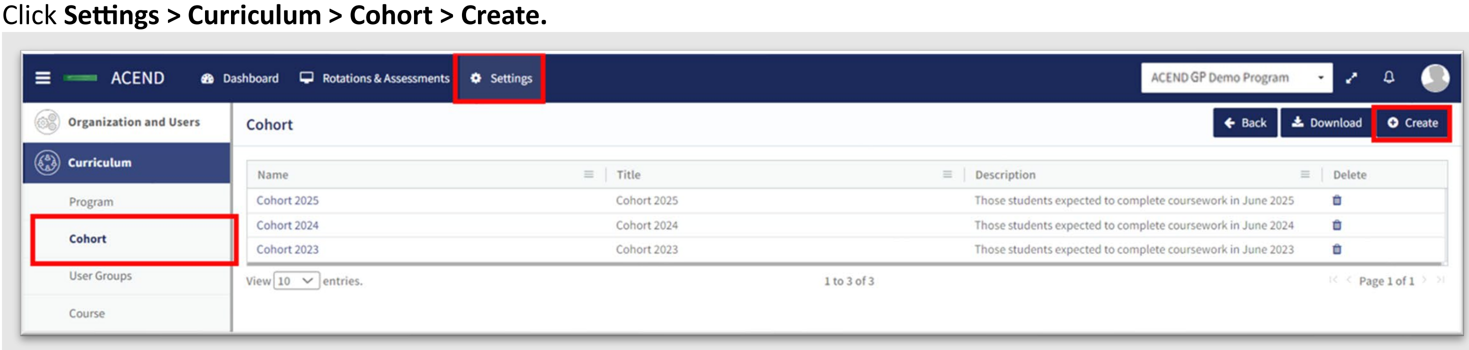
101 can be assigned to Cohort 2025, Program Year 1, Fall 2023 and also Cohort 2026, Program Year 1, Fall 2024.

How to Create a Course	
Name	Displays on the dashboard and all course dropdown menus. This is the only field required to create a course.
Title	Displays on a scroll over text menu when on the dashboard.
Source Course ID	Optional advanced feature. Use the field to identify a course number from an outside LMS such as Canvas or D2L.
Custom Label	Optional feature. Label courses as selective or track. For example, an elective course may be labeled as *selective* and a professional course may be labeled as *track*.
Description	Only available for viewing to the Program Director from the **Course** tab on the **Curriculum** page.
Start Date/End Date	Advanced feature to be used ONLY when retiring or creating a new version of a course. DO NOT add start/end dates when creating a new course. Actual course dates will be determined when the course is added to a **Phase** and **Block**.
Save	Click **Save** to create the **Course**.

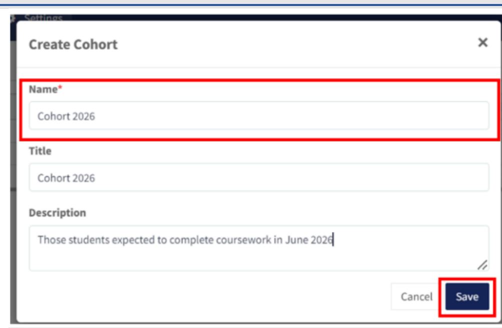


2d. Cohort

Click **Settings > Curriculum > Cohort > Create.**

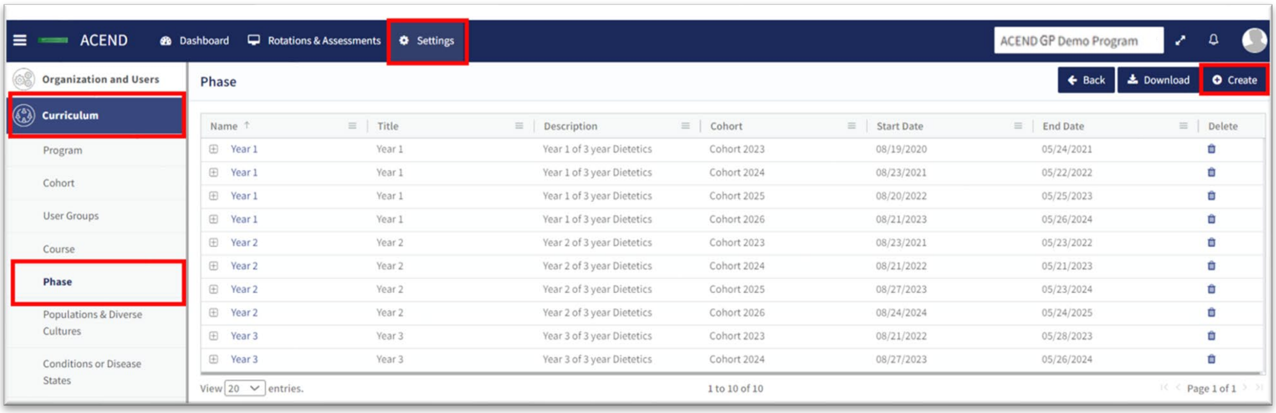


How to Create a Cohort	
Name	Displays on the dashboard and all cohort dropdown menus. This is the only mandatory field when creating a cohort. **IMPORTANT!** Every cohort must have a unique name.
Title	Displays on a scroll-over text menu when on the dashboard.
Description	Only available for viewing to the Program Director from the **Cohort** tab on the **Curriculum** page.
Save	Click **Save** to create the **Cohort**.



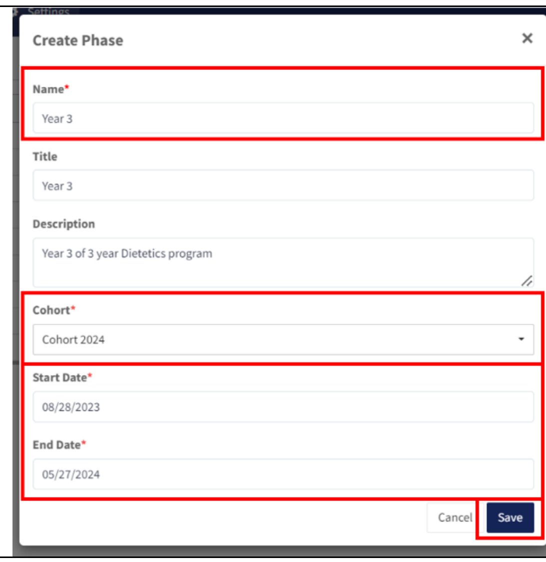
2e. Phase

Click **Curriculum > Phase > Create.** A Phase is equivalent to a program year.



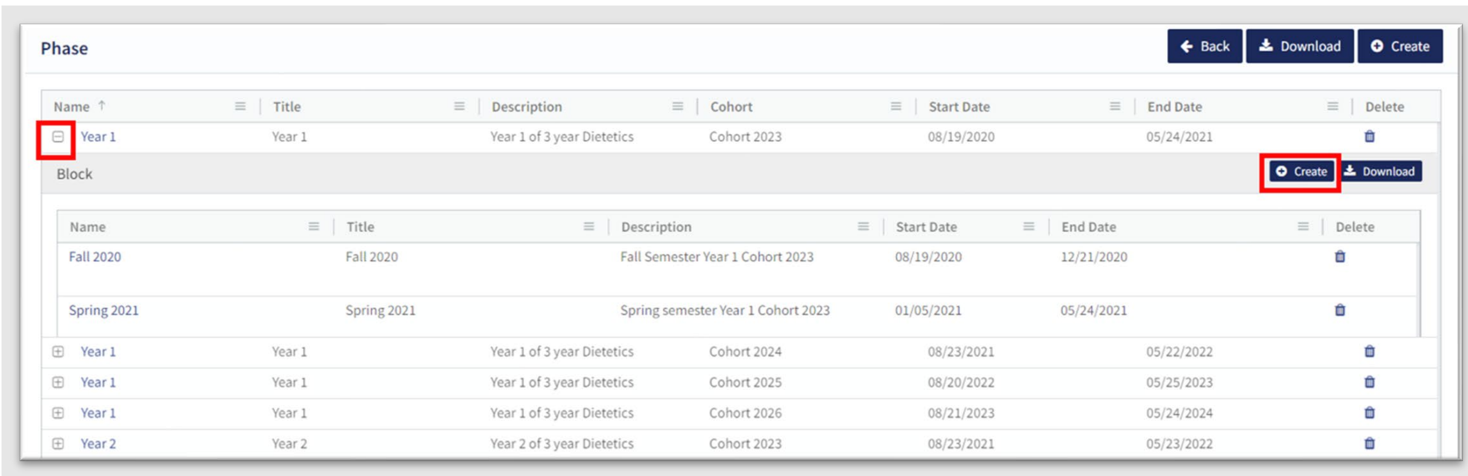
Create Program Phases

Name	Displays on the dashboard and all phase dropdown menus.
Title	Displays on a scroll over text menu when on the dashboard.
Description	Only available for viewing to the Program Director on the **Curriculum** page.
Cohort	Mandatory field. Use the dropdown menu to select the cohort associated with this phase.
Start/End Date	Mandatory field. Add a **Start Date** and **End Date** for this phase. This is usually one academic year, however this may vary.
Save	Click **Save** to create the phase.



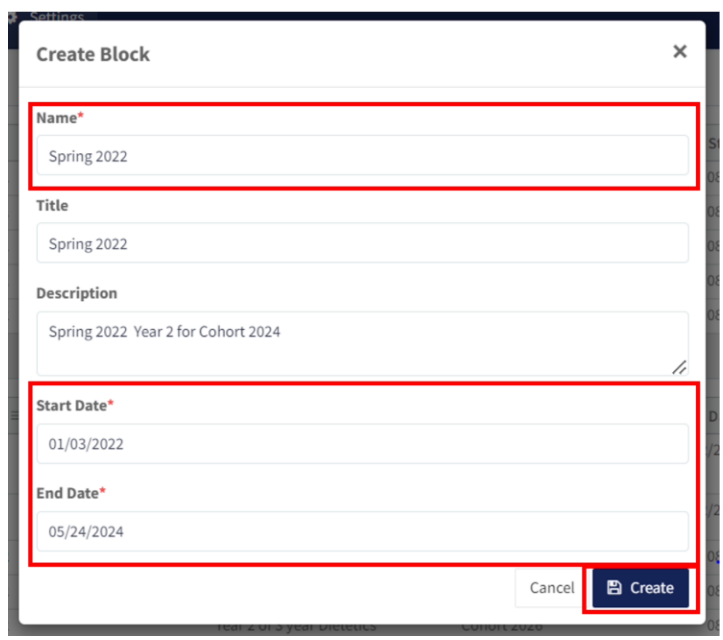
2f. Blocks

Phases are broken into time periods called **Blocks**. These may be semesters, trimesters, rotation cycles or any blocks of time which make up a full phase (program year). These are mandatory to create in order for the system to appropriately capture data. To create Blocks, click the **+** next to the **Phase** you wish to modify. Then, click the internal **Create** button in the **Block** tile, which is now available below the **Phase** when expanding the tile.



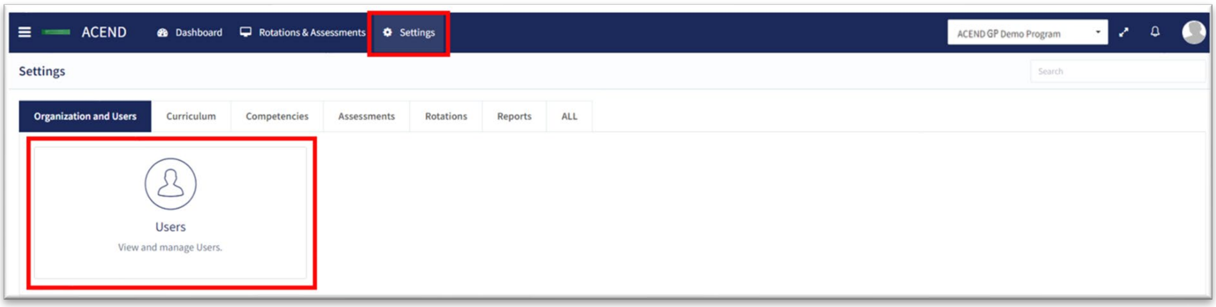
Create Blocks for Each Phase

Name	Displays on the dashboard and all cohort dropdown menus.
Title	Displays on a scroll over text menu when on the dashboard.
Description	Only available for viewing to the Program Director from the **Cohort** tab on the **Curriculum** page.
Start/End Dae	**Start Date** and **End Date** for this **Phase**. This is usually one semester; however this may vary from program to program.
Create	Click **Create** to create the **Block**.



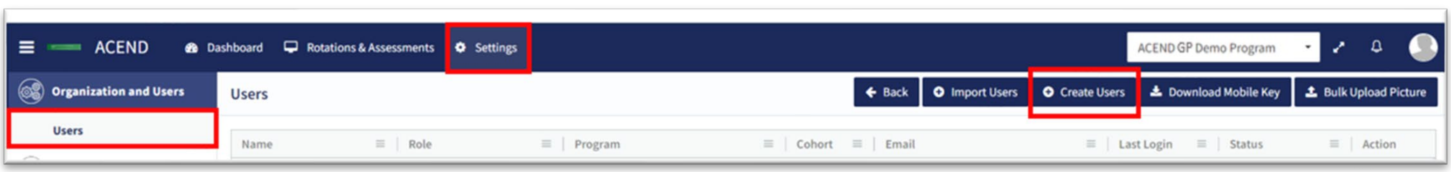
3. Add Users

From the **Settings** tab, click **Users** to view and manage users within your program. Competency allows the flexibility of creating a single user at a time or uploading a bulk import of users.

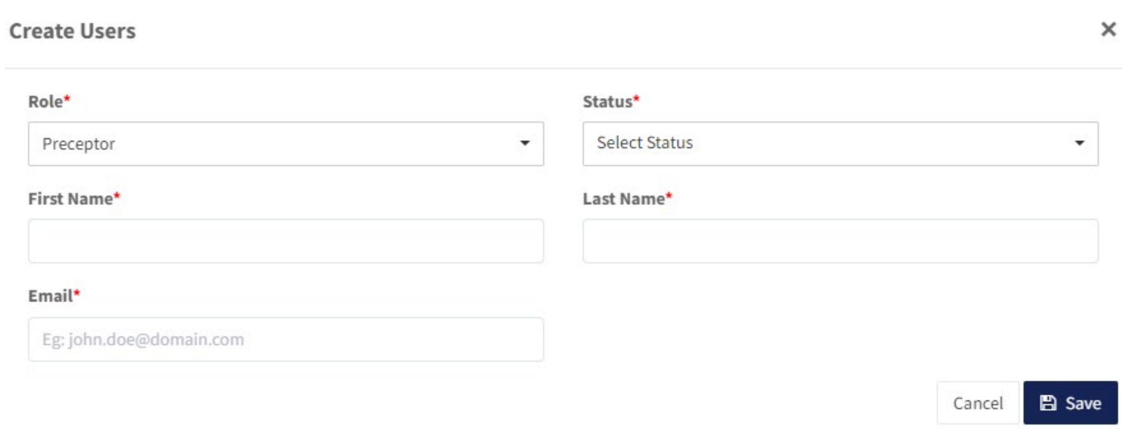


3a. Single User Creation

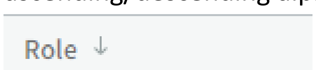
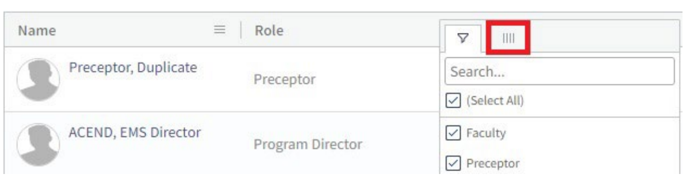
Click **Settings** > **Users** > **Create Users** to create a single new user within your program.



IMPORTANT! Currently, there is no faculty role within Comptency. All faculty must be assigned under a **Preceptor Role** in order to be assigned to specific courses and to evaluate students. One way to easily identify faculty in the Preceptor Role profile is to add "faculty" to their user profile. For example, Dr. Jane Smith, may be noted as "Dr. Jane Smith (Faculty)" when creating the user profile.

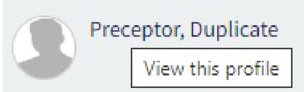
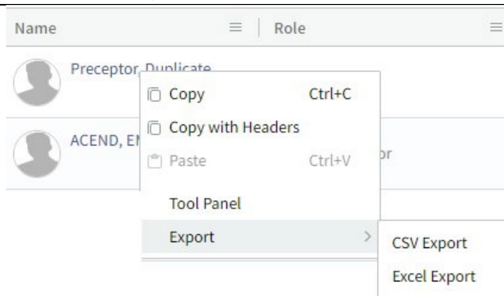


<table>
<tr><td>Role</td><td>When creating a new user it is important to select the correct role:<table><tr><td>Program Director</td><td>Primary administrator. The program director has broad permissions to update settings, add new users, manage rotations, import data, and view all learner activities. Program Directors can also create assessments, complete evaluations, and view all Competency dashboards. Program Directors may also be assigned a secondary role as a preceptor (includes faculty role) if necessary.</td></tr></table></td></tr>
</table>

<table>
<tr><td rowspan="2"></td><td>Preceptor (includes Faculty)</td><td>The preceptor role is used to identify a program preceptor or faculty. Since faculty do not have their own role in the system, they must be categorized as Preceptors in order to complete student assessments. The preceptor role does not have access to Settings and can only view dashboards related to rotations and/or courses they have been associated with. Preceptors can also complete evaluations and confirm student hour submissions.</td></tr>
<tr><td>Student</td><td>The student role does not have access to Settings. Students can only see their own personal student dashboard with cohort mean information. Students can never see specific student scores or data beyond a cohort mean. Students cannot have a secondary role.</td></tr>
<tr><td>Status</td><td colspan="2">Users may be Active or Inactive. Creating an Active role with an active email address will send an email invitation to the user. If you are not ready to send an email notification, create your users in Inactive status.</td></tr>
<tr><td>First Name, Last Name and Email Address</td><td colspan="2">Mandatory fields. Email addresses should be unique to each user and will be used as a unique identifier for all non-student roles.</td></tr>
<tr><td>Student ID/Campus Key</td><td colspan="2">Mandatory field for Student Role. This is a unique identifier for all student data import and should align with student numbers in your LMS if you are importing student data. If students do not have a student ID, you can number them 1, 2, 3, etc. depending on program preferences. Student ID is required in settings, however the template for bulk upload refers to “Campus Key” and this is synonymous for “Student ID”.</td></tr>
<tr><td>Cohort</td><td colspan="2">Mandatory field for Student Role. IMPORTANT! Cohorts must be created BEFORE students can be created or imported. See Cohorts section for more information.</td></tr>
<tr><td>Save</td><td colspan="2">Click Save to create a new user.</td></tr>
<tr><td colspan="3">Navigating Users Block</td></tr>
<tr><td>Sort Columns</td><td colspan="2">When clicking the Users block above, you can click the column headers to sort the column in ascending/descending alphabetical order.

</td></tr>
<tr><td>Search/ Filter</td><td colspan="2">1. Click the hamburger icon at the top of the desired column you would like to filter/sort.


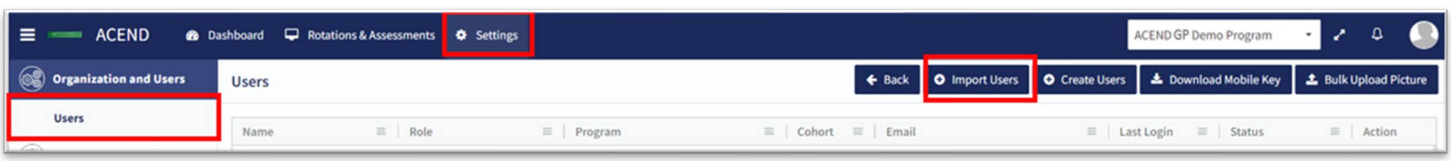
2. Search by keyword or click the checkboxes for a specific search.
3. Click the bookshelf icon to select additional search criteria.</td></tr>
<tr><td>Column width</td><td colspan="2">

Click the column header to expand/contract the column.</td></tr>
</table>

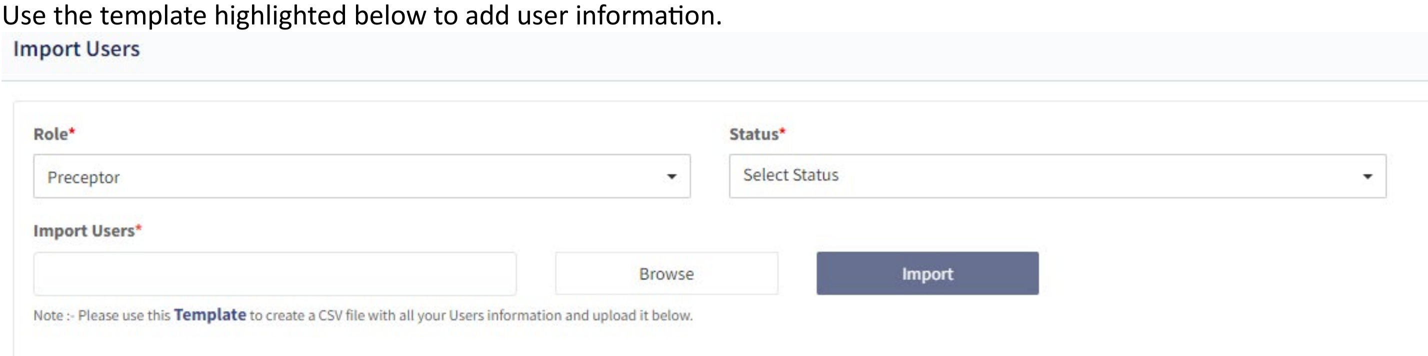
Mouse-over/select	 Mouse-over/click blue links for more information about the profile such as role and email address.
Export to CSV/Excel	 Right-click anywhere in the grid to export to CSV/Excel.
View More Entries	 On the bottom left, click to view more entries on the page.
	 On the bottom right, click the arrows to view other pages.

3b. Bulk Import Users

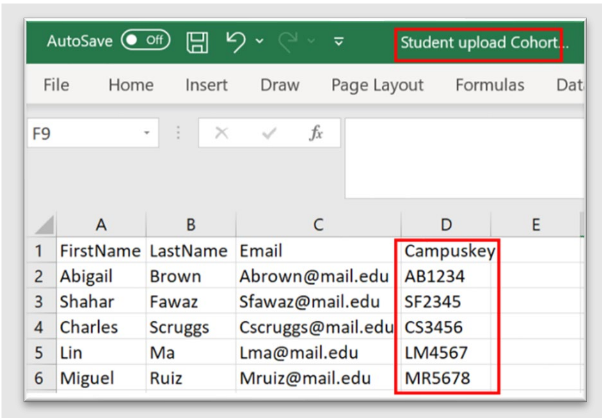
Click **Settings > Users > Import Users** to import users directly into Competency using a template file.

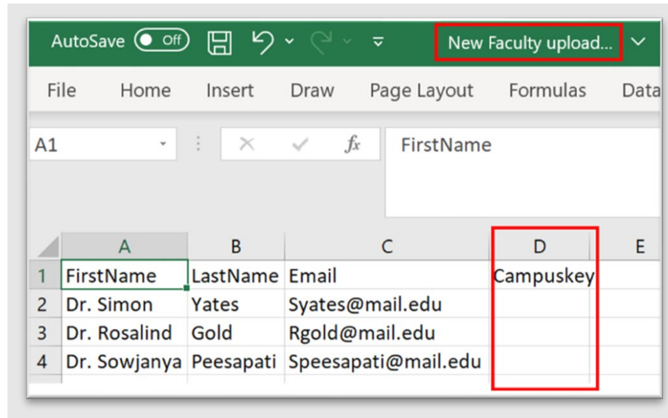


Use the template highlighted below to add user information.



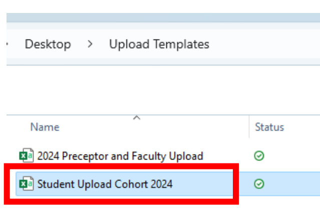
1. Click the **Template** link to download the Excel template. You must complete ***separate templates*** for each role and cohort you plan to import.
2. Select the **Role**, **Status** and **Cohort (Students only)**. **IMPORTANT!** In the **Status** field, select **Inactive** <u>if you do not want users to receive an automatic email that their Competency accounts have been activated</u>. Users will receive invites when their accounts have been activated.



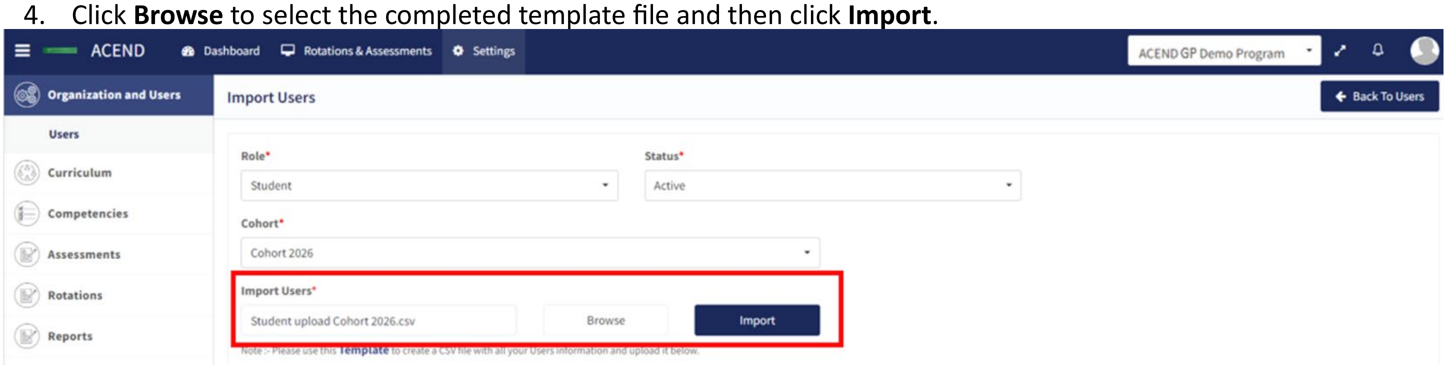


First Name, Last Name and **Email address**	All users **MUST** have a **First Name, Last Name and Email address**.
Student ID/Campus Key	• Students **MUST** also have a **Student ID/Campus Key** as a unique identifier. • Student IDs cannot be repeated. For example, if you already created the following student ID (1, 2, 3), you cannot reuse these for subsequent cohorts unless the students are removed. If your program does not have student IDs, you may need to consider alternatives such as YEAR-# (20241, 20242, etc.). • This can be left blank for Preceptor imports. **Note:** Program Directors are created by ACEND.

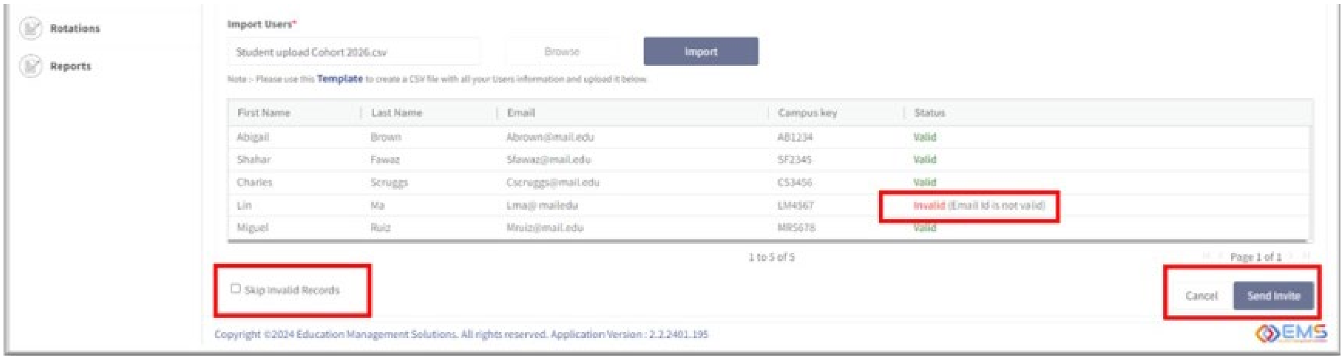
3. **Save** the file as CSV.



4. Click **Browse** to select the completed template file and then click **Import**.



5. Competency validates mandatory fields prior to import. If an item on the completed .csv file fails validation you will receive an invalid status notification in red.

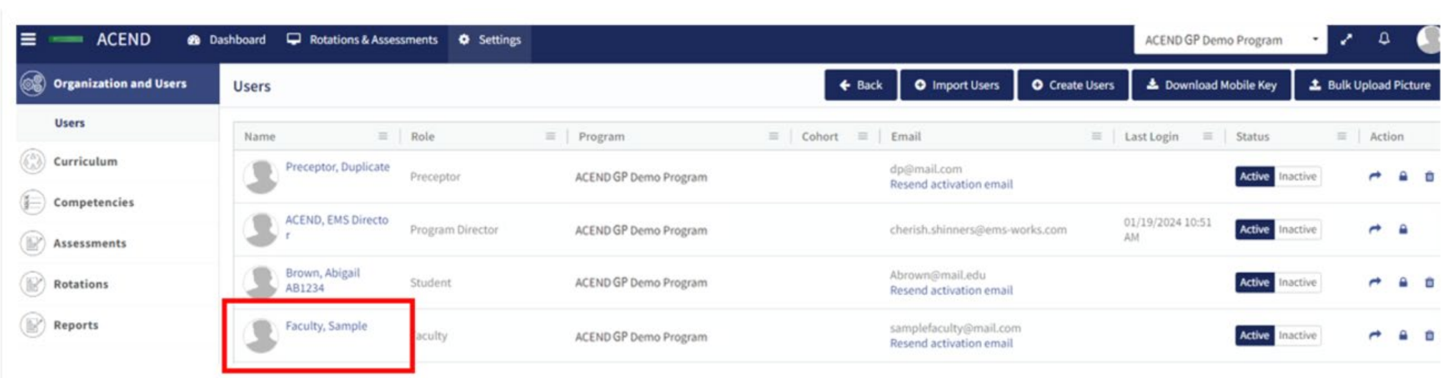


6. If all records are **Valid**, click **Send Invite** (for active user imports) or **Add Users** (for inactive user imports).

7. **Invalid** records: If any items in your import file are incorrect, the **Status** appears as **Invalid** with the reason included (i.e., email is not valid, student ID already in use, duplicate email address, etc). To manage Invalid records:
   a. **Skip Invalid Records**: Click the checkbox to skip over the invalid records and continue importing the rest of your users. Once you make this selection, the **Send Invite** or **Add Users** button is active. *You will still need to upload your invalid users in a separate template at another time*.
   b. **Cancel**: Click **Cancel**, correct the invalid information in the .csv file, and then upload and import the corrected .csv file.
8. Click **Settings** > **Users** to confirm imported users.
   Note: Only **Active** users appear in dropdown fields when adding users to Rotations or Evaluations. Be sure to make the users **Active** once you are ready to assign them to a rotation/course.

<u>User Profile Updates</u>

Click **Settings** > **Users** > **User Name** to update user profiles



Provide additional user data such as contact information, GPA, Education and Training, etc., or add Secondary Roles to Program Directors.

4. View/Edit/Create Program Specific Items to be Mapped and Measured

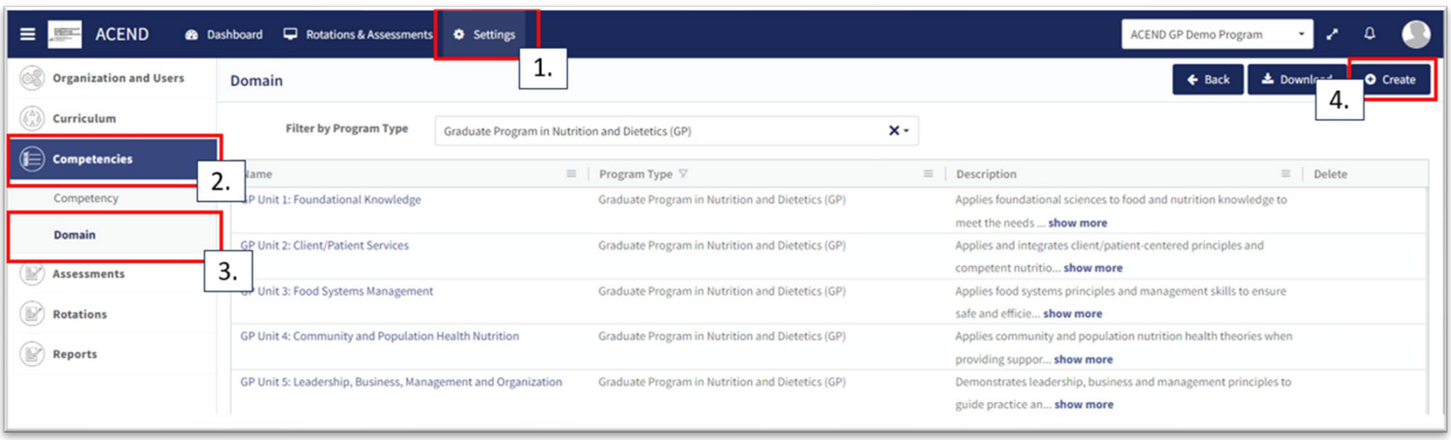
Competency provides a framework for your program to chart student progression through ACEND domains and competencies. This framework has been provided by ACEND and created by EMS in Competency. ACEND Competencies cannot be edited, however, programs may add program specific domains and competencies outside of those provided by ACEND. Use the steps below to review ACEND specific domains and competencies and add program specific domains and competencies.

Competency also allows the flexibility to create and edit program-specific conditions or disease states, populations and diverse cultures. Items created and edited in these fields will populate the Dashboard and dropdown menus to be used for future mapping.

4a. Review and Create Domains

Domains are a way to group competencies. When you create a NEW competency, you will add that competency to a domain. *If your program has additional competencies to track outside of the ACEND-required competencies, create a new domain(s) for any additional competencies*.

Click **Settings > Competencies > Domain**



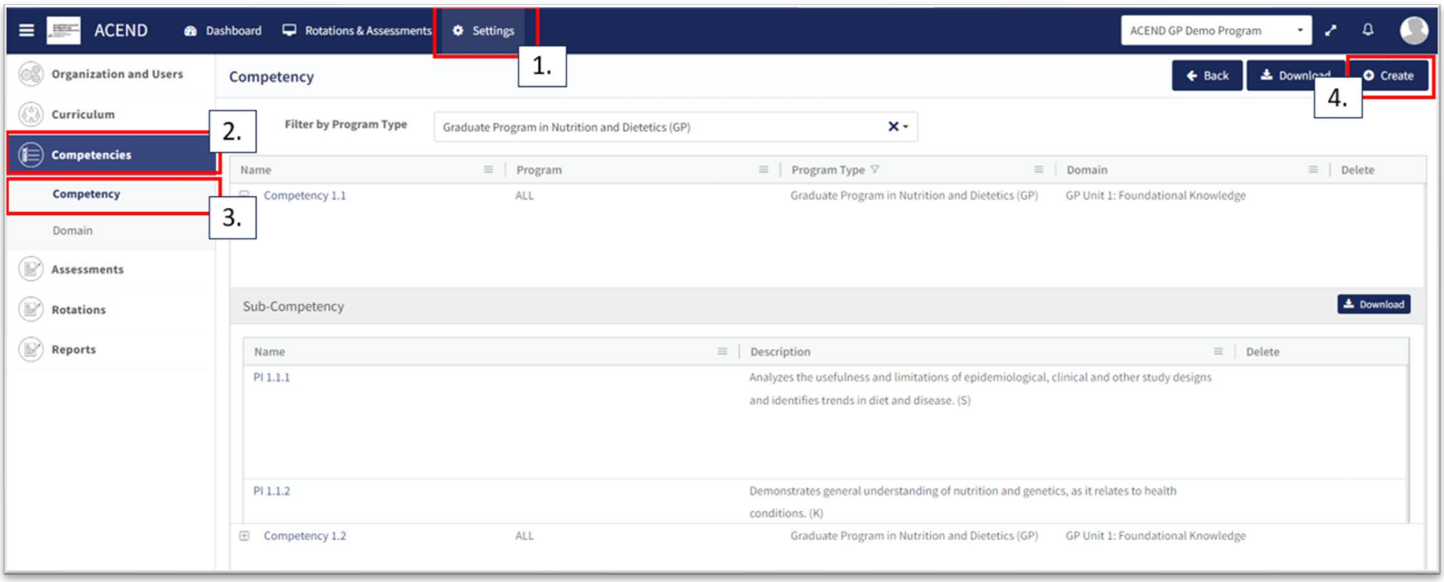
Review provided Domains to make sure they are appropriate for your program. To create additional Domains:

- Click **Create.**
- **Name** the new domain, add a title, and details. This new domain will now be available to select when creating new competencies. Click **Save.**

4b. Review and Create Competencies

Click Settings > Competencies > Competency

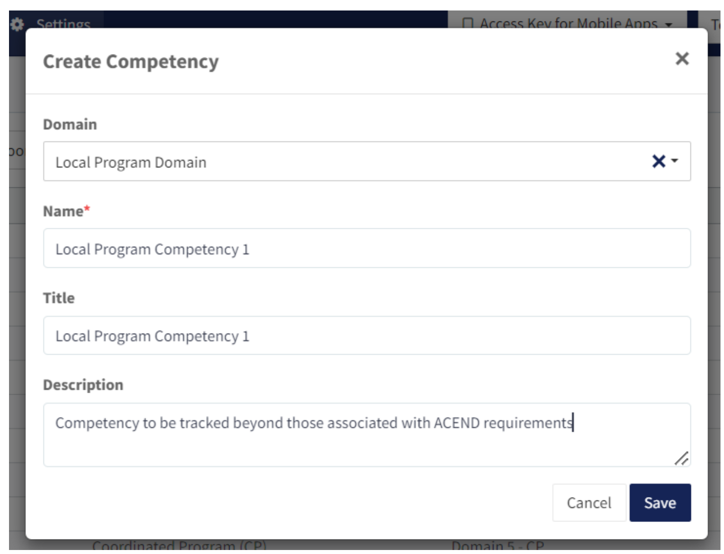
Review the ACEND-required Competencies and Sub-Competencies (performance indicators) for accuracy.



<u>Create Additional Competencies</u>

Click **Settings > Competencies > Competency > Create**

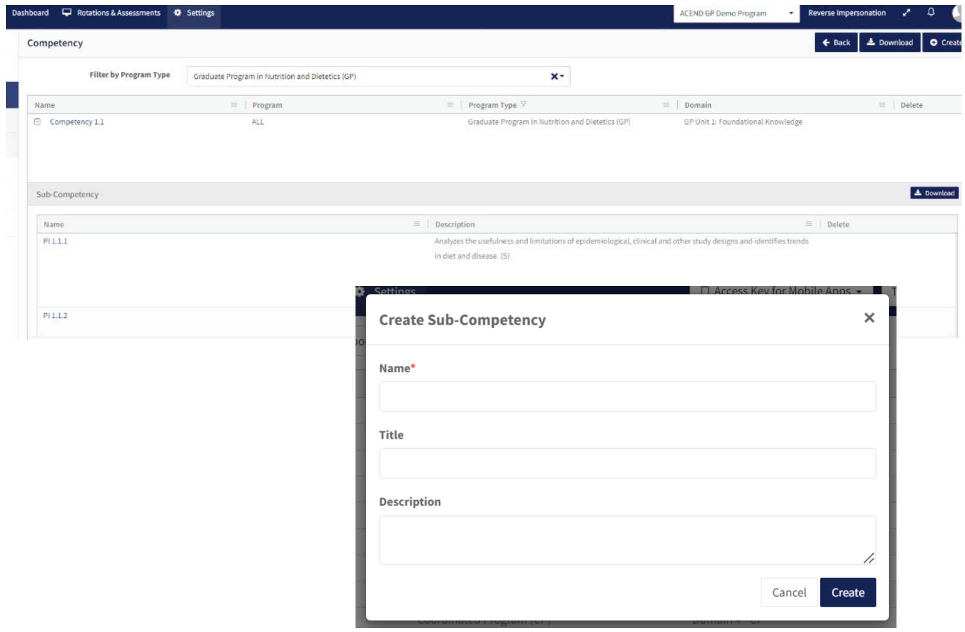
Domain	Associate the competency to the appropriate domain in the dropdown menu. If the correct domain is not available, see **4a. Review and Create Domains** prior to this section.
Name	Mandatory field. Create the competency name to display in all dropdown menus and the dashboard.
Title	Displays on a scroll over text menu when on the dashboard.
Description	Only available for viewing to the Program Director.
Save	Click **Save** to create the competency.



Create Additional Sub-Competencies (Performance Indicators)

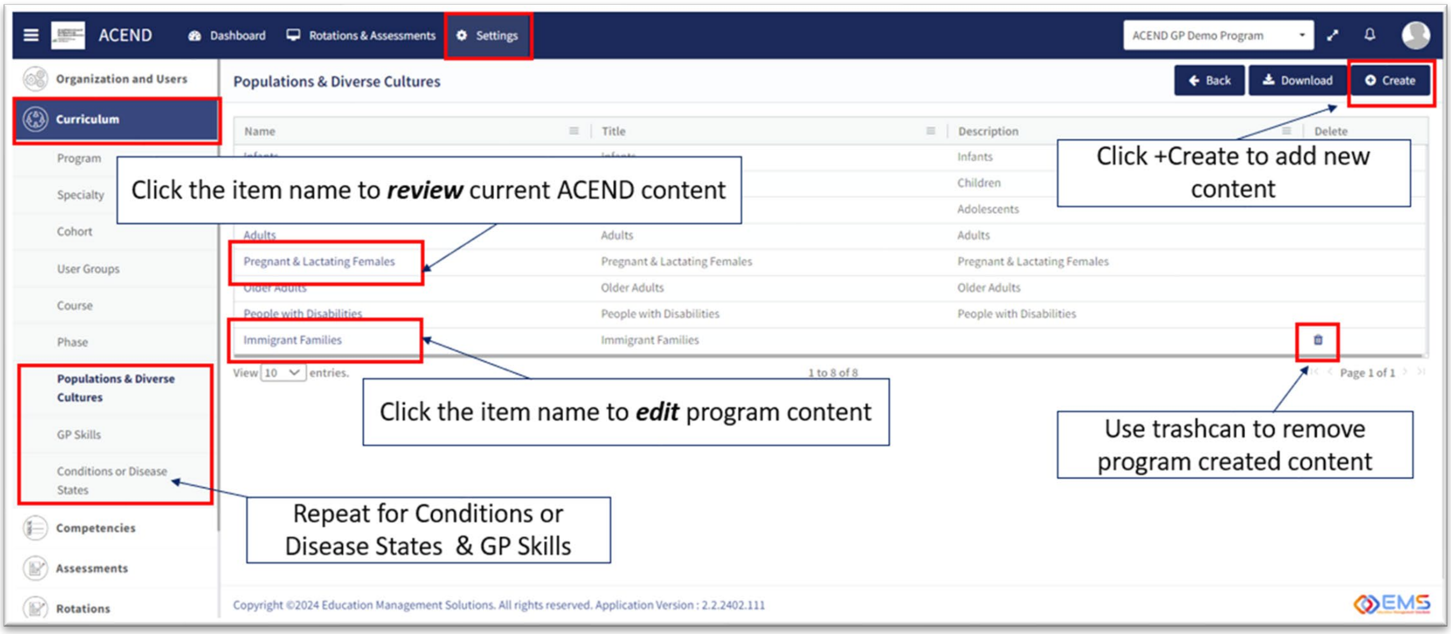
Within the competency, click the + next to the competency, and then click Create.

Name	Mandatory field.
Title	Displays on a scroll over text menu when on the dashboard.
Description	Only available for viewing to the Program Director.
Create	Click to create sub-competency.



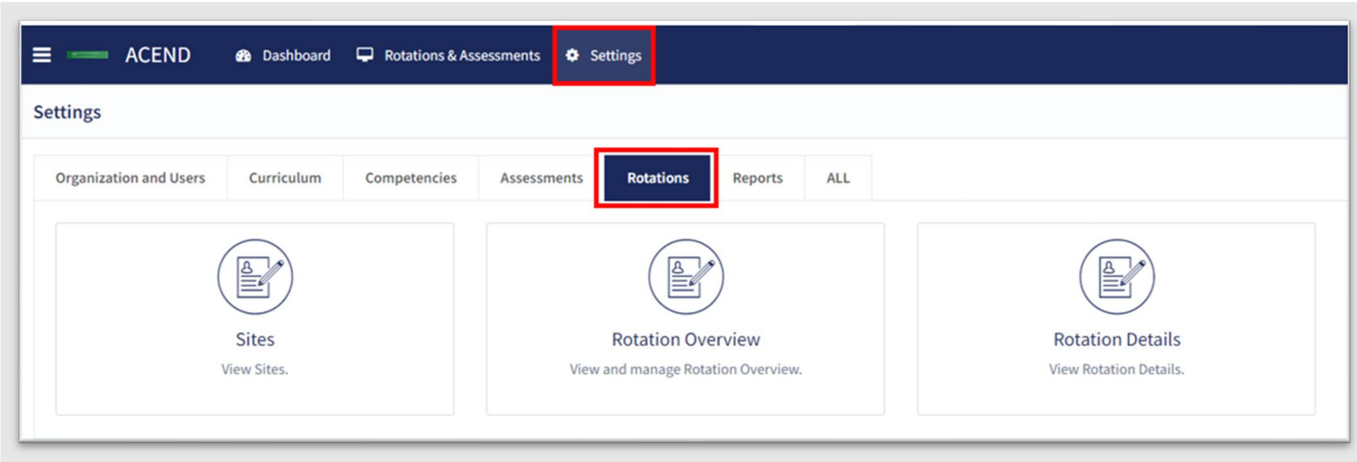
4c. Review and Create Conditions or Disease States, Populations and Diverse Cultures, and GP Skills

Click **Settings** > **Curriculum** > **Conditions or Disease States** (Follow the same steps for Populations and Diverse Cultures and GP Skills.



5. Rotations

The **Rotations** tab under **Settings** in Competency allows Program Directors to manage rotation sites, create rotation details, and assign and manage student evaluations.

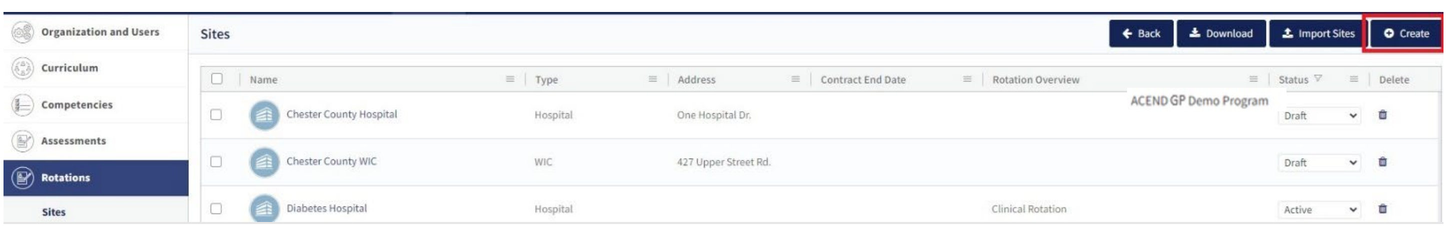


Click **Settings** > **Rotations**.

Sites	Allows Program Directors to create, edit and view **Rotation Sites**. Site details include the rotation site name, type, address, contract start and end dates, notes about the site, a list of associated preceptors, and shift schedules. Site details can be created one at a time or they may be brought into Competency via bulk upload. You may not choose to use all of the data points available in this section. The only mandatory fields are **Site Name** and **Site Type**. A dropdown list of **Site Types** has been provided by ACEND.
Rotation Overview	Allows Program Directors to create, view and manage rotations and overall rotation information such as patient encounter notes and checklist evaluations. **Rotation Overviews** act as "course shell" when creating or importing **Rotation Details**. All information contaned in the **Rotation Overview** will be added to individual student rotations in **Rotation Details.**
Rotation Details	Allows Program Directors to upload, edit and manage the details of student rotations to include rotation dates, sites, preceptors and students.

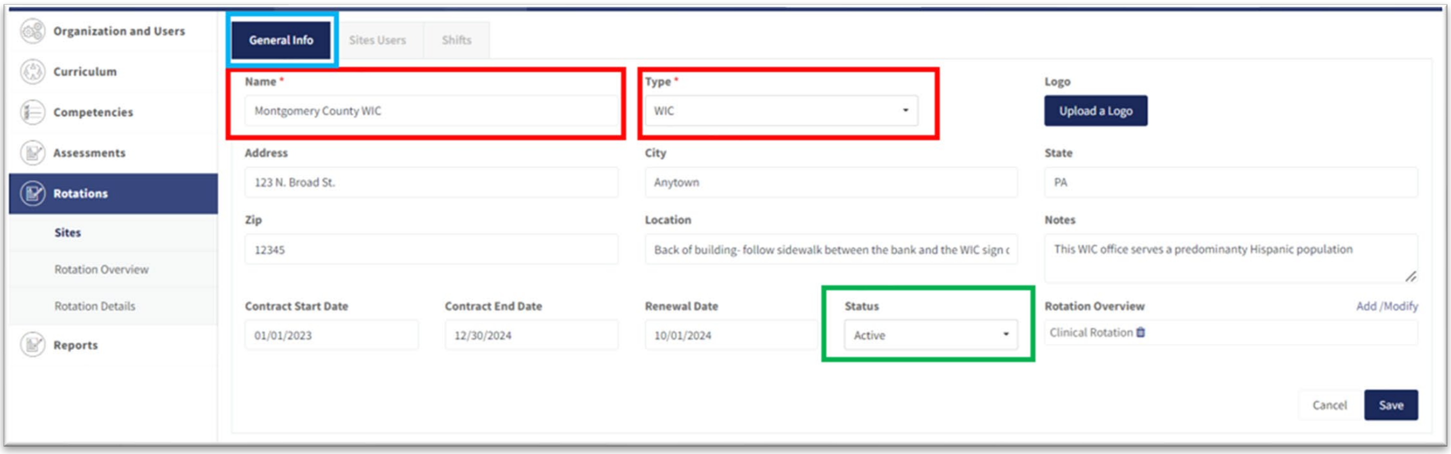
5a. Sites

To create an individual site, click **Settings > Rotations > Sites > Create.** Site details can created one at a time or they may be brought into Competency via bulk upload.



<u>**General Information Tab**</u>

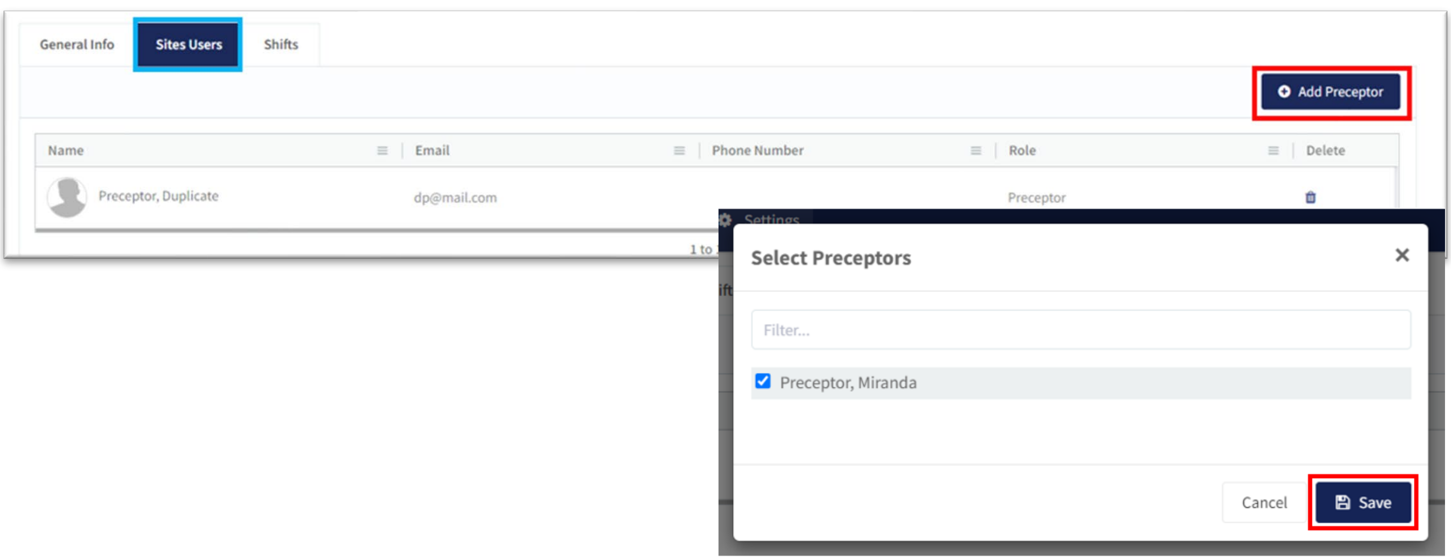
Complete the fields on the **General Info** tab as indicated. ***Note*:** As with many features in Competency, there are many items you may or may not wish to include in your **Site Details**. Mandatory fields are indicated by *.



Name	Mandatory field. **IMPORTANT! Site Name will be used to identify sites when you import rotations and the spelling must be exact.** Please set a standard naming process. Importing sites with different spellings under **Rotation Details** will result in duplicate sites.
Type	Mandatory field. Select site type from the pre-populated dropdown menu. Select **Other** if the current menu options do not meet your needs.
Status	This is set to **Draft** as default. To make a site available to be added to **Rotation Details**, set the **Status** to **Active**.
Save	You MUST click **Save**. Selecting "cancel" and "back to sites" will NOT save your information or updates.

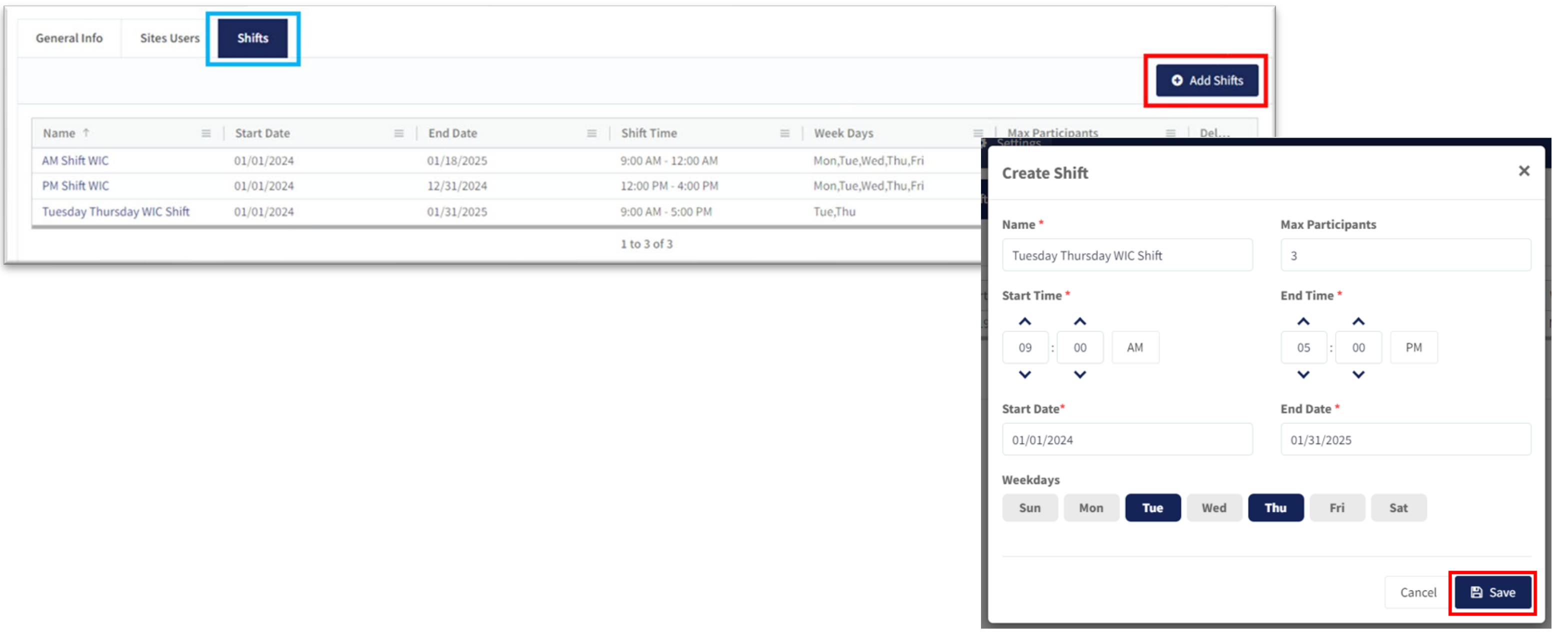
<u>Site Users Tab</u>

1. Click **Add Preceptor**. Active preceptors from the program user list populate a drop down list. Assign preceptors to this site. ***Note*:** Preceptors can be assigned to multiple sites. Click **Save.**



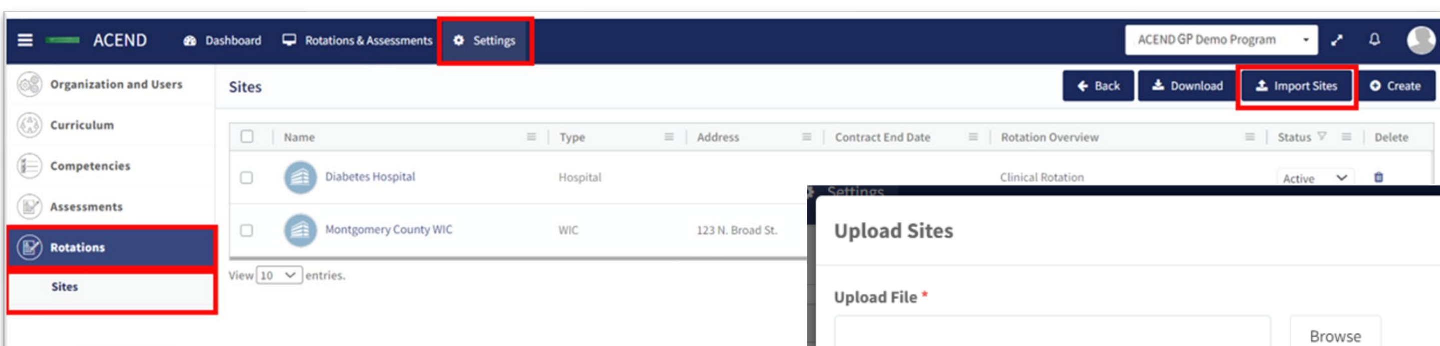
Shifts Tab

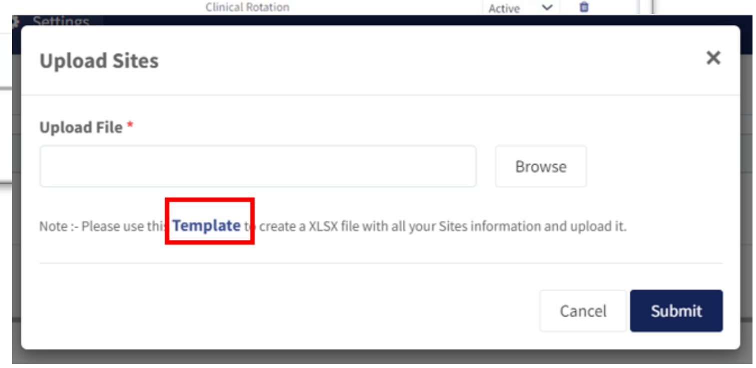
Click **Add Shifts** to create shift rotations available to students. Shifts will display on Preceptor dashboards once rotations have been created and assigned. You MUST click **Update/Save**.



Bulk Upload Sites

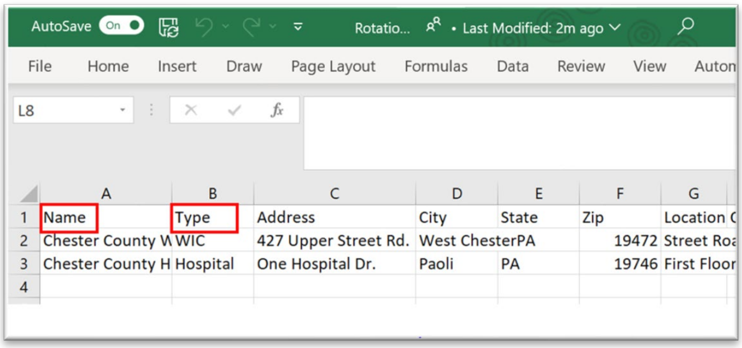
To bulk upload your sites, click **Settings** > **Rotations** > **Sites** > **Import Sites**



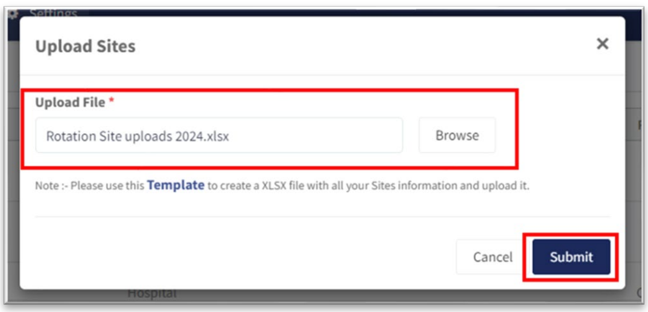


Click the **Template** link to download and complete the Sites Template. Save the file as .csv.

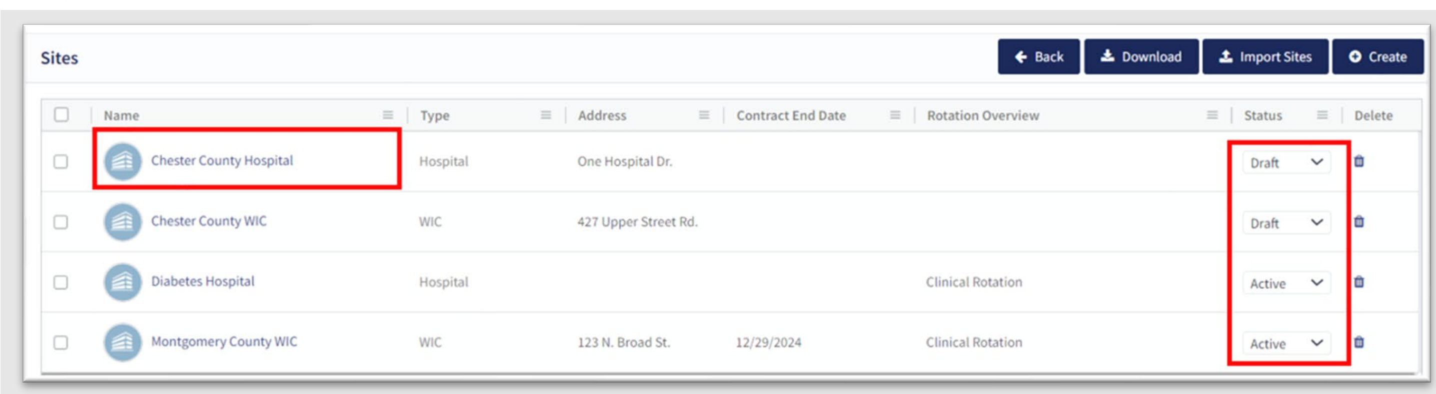
Only **Name** and **Type** are mandatory fields for uploading site information. The type must be one of the following noted in the drop-down list when creating an individual site: Hospital, Outpatient Clinic, Rehabilitation Facility, Skilled Nursing Facility, Home Care, Hospice Care, School District, Public Health Department, Private Practice, WIC, Community Center, Community-Other, Food Servcie-Other, and Other.



Click **Browse**, select the completed template file, click **Open**, and then click **Submit**.

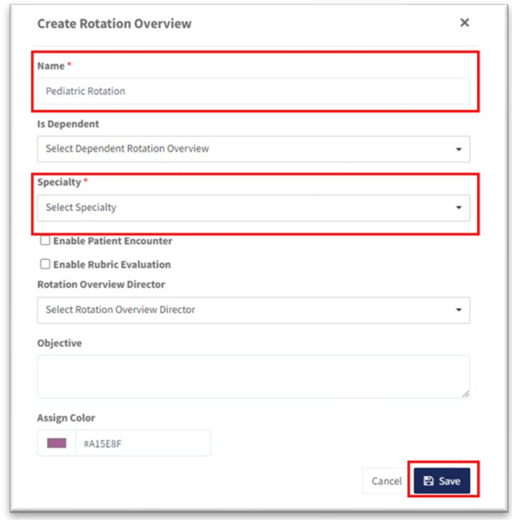


New **Sites** always upload as **Draft**. Change the **Status** from Draft to **Active** on the **Sites** tab or in the **Site General Info** tab where you initially created the rotation. **Note**: To add Sites to a Rotation, the site must be **Active.** Click the **Site Name** to edit information.



5b. Rotation Overview

Rotation Overview can be considered a "course shell" to be reused every time the rotation is scheduled. For example, the Pediatric Rotation created in this **Rotation Overview** example below will be reused by students in Cohort 2024 and Cohort 2025. Additional details will be added when **Rotation Details** are created for supervised experiences.



Click **Settings > Rotations > Rotation Overview > Create.**

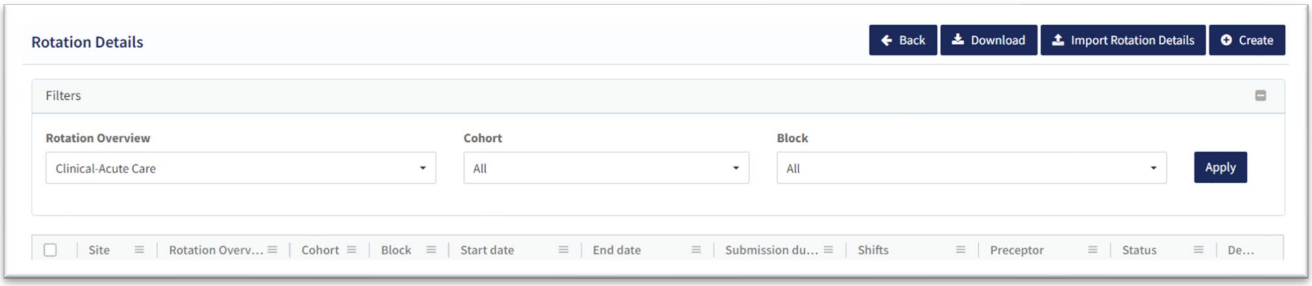
Name	Mandatory field. Displays on the dashboard and all cohort dropdown menus . Name must be unique to the rotation.
Is Dependent	Creates a dependency. For example, if the Pediatric Rotation is only available to students who have already completed a general rotation, such as Hospital Clinical Rotation, indicate this by selecting the specific rotation under **Is Dependent**. Leave this space set to **Select Dependent Rotation Overview** if there is no dependency.
Specialty	Mandatory field. Dropdowns are created on the S**pecialty** tab. If you do not see the specialty associated with this rotation, see **Specialty** section to create specialties.
Enable Patient Encounter	Must be checked if students are to complete patient encounter notes in Competency.
Enable Rubric Evaluation	Rubric evaluations will be available to assign to a rotation from the Competency dashboard. It is not necessary to **Enable Rubric Evaluations** in the **Rotation Overview**.
Rotation Overview Director	Non-mandatory field. Leave **Select Rotation Director** selected as no selections will be available.
Objective	Non-mandatory field. May be added to the **Rotation Overview**. This provides information on the student learning objective within the rotation.
Assign Color	Assigns a color to a rotation on the student dashboard calendar.
Save	Click **Save** to create the **Rotation Overview**.

5c. Rotation Details

Rotation Details allow Program Directors to upload, edit and manage the details of student rotations to include rotation dates, sites, preceptors, and students. **Patient Encounter Notes** and **Checklists** housed in a **Rotation Overview** cannot be completed by learners and preceptors until they have been assigned in **Rotation Details**. Competency allows the flexibility to create **Rotation Details** individually with **Create** or in bulk with **Import Rotation Details**.

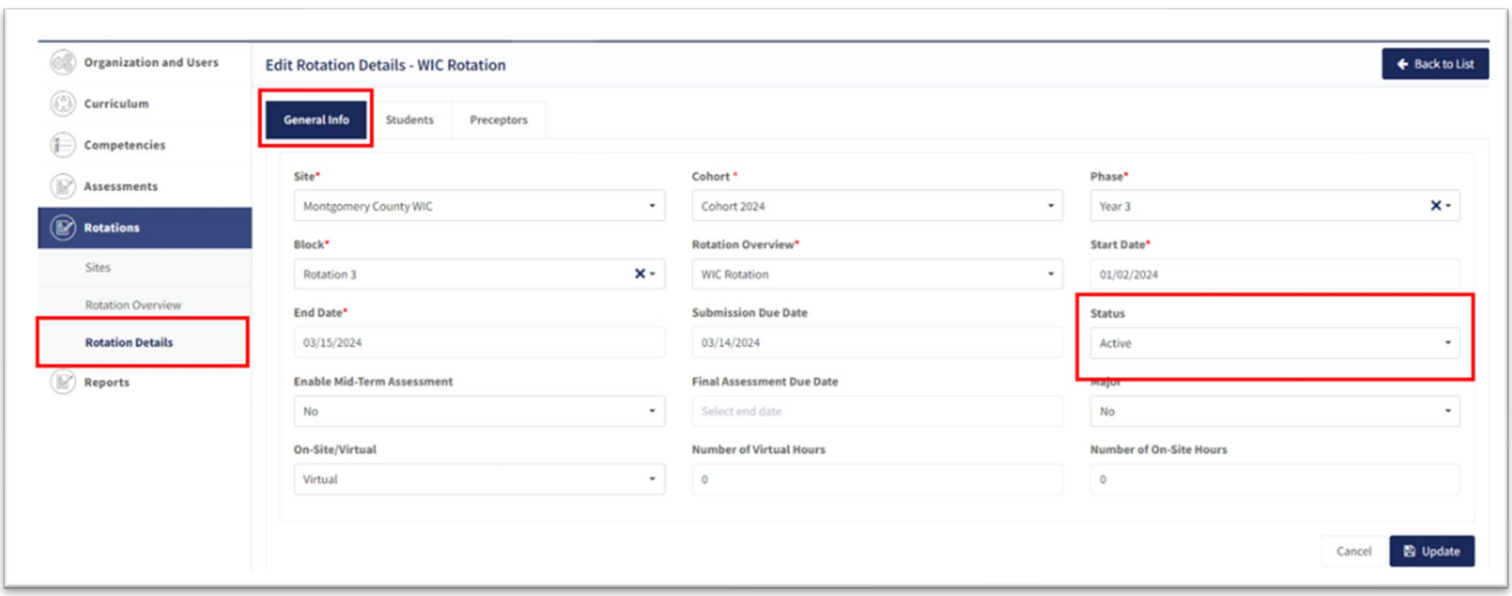
<u>Create Individual Rotations</u>

Click **Settings > Rotations > Rotation Details > Create**



A. General Information Tab

As with many features in Competency, there are many items you may or may not wish to include in your **Rotation Details**. Mandatory fields are indicated by *.

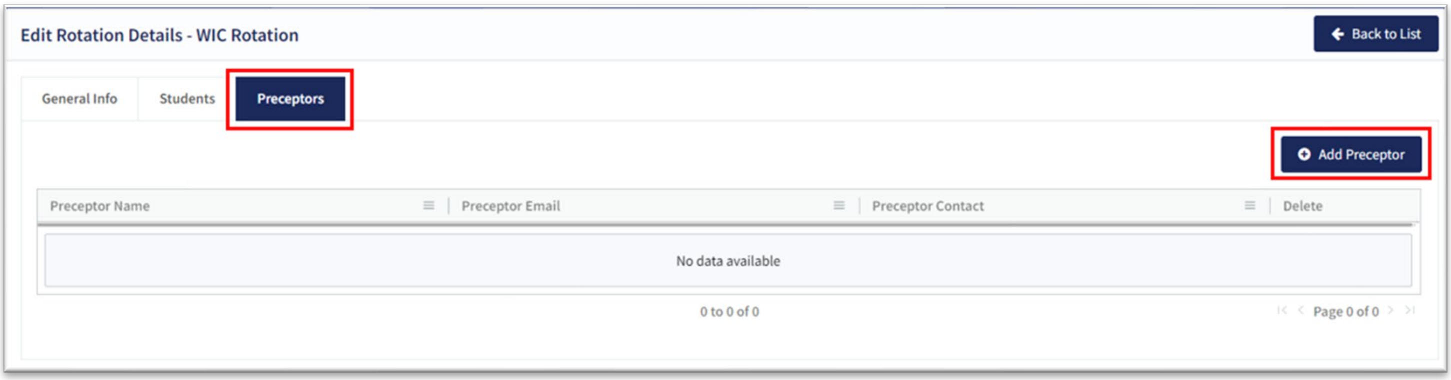


Site	This dropdown list was created under the **Sites** tab in **Rotations.** Click to select a site.
Cohort	Students added to the selected cohort will populate the **Students** tab and may be placed in the rotation. **Note:** If you do not see students in your cohort, click **Settings > Users** and update student profiles to include cohort information.
Phase and Block	Populate the rotation start and end date fields. If the rotation is not associated with a previously created **Phase** and **Block**, complete the **Start Date** and **End Date** fields manually. **Note**: These dates indicate the dates your learners and preceptors will have access to complete Patient Encounter Notes and Checklist Evaluations within the Competency app.
Rotation Overview	Adds the details and evaluations created in the selected **Rotation Overview** to the **Rotation Details.**

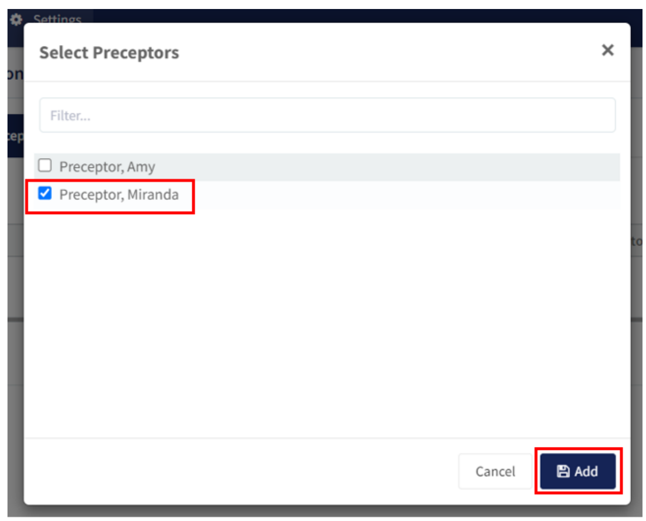
Status	Must be **Active** to assign students and preceptors to a rotation. Status may be changed by the Program Director as needed.
Save	Click **Save** to create the **Rotation Details.**

Click the **Preceptor tab** > **Add Preceptors**

B. **Preceptor Tab**

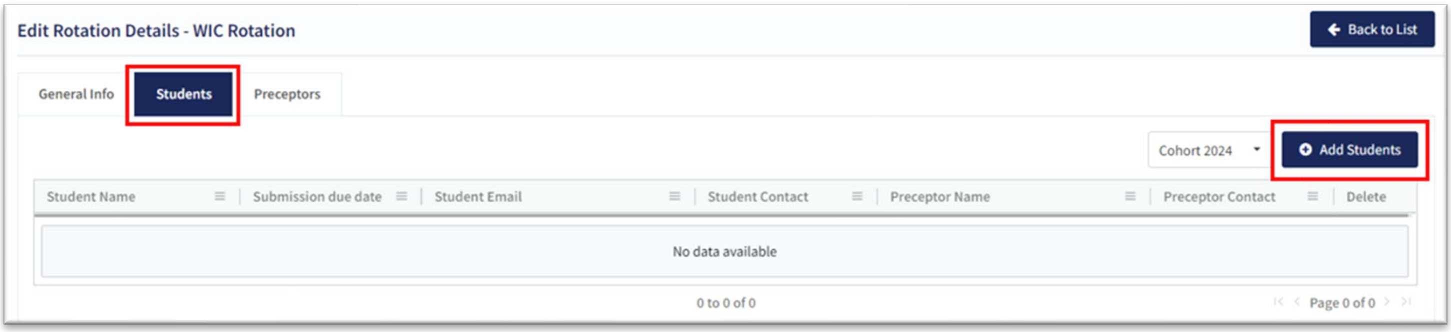


C. Add preceptors to the **Rotation Details**. This can be done at the time you create the rotation or added later.
D. Preceptors must be **Active** on the user list to be added to a rotation.
E. Select preceptors and click **Add** to the rotation.

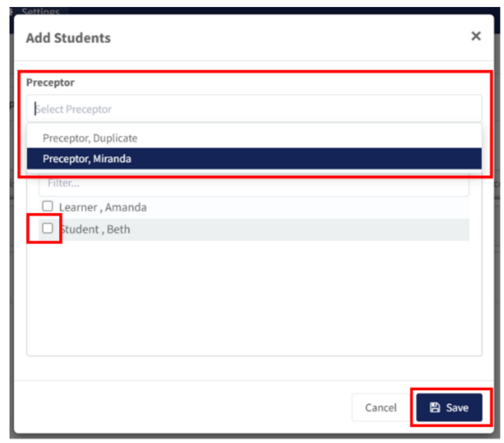


C. Students Tab

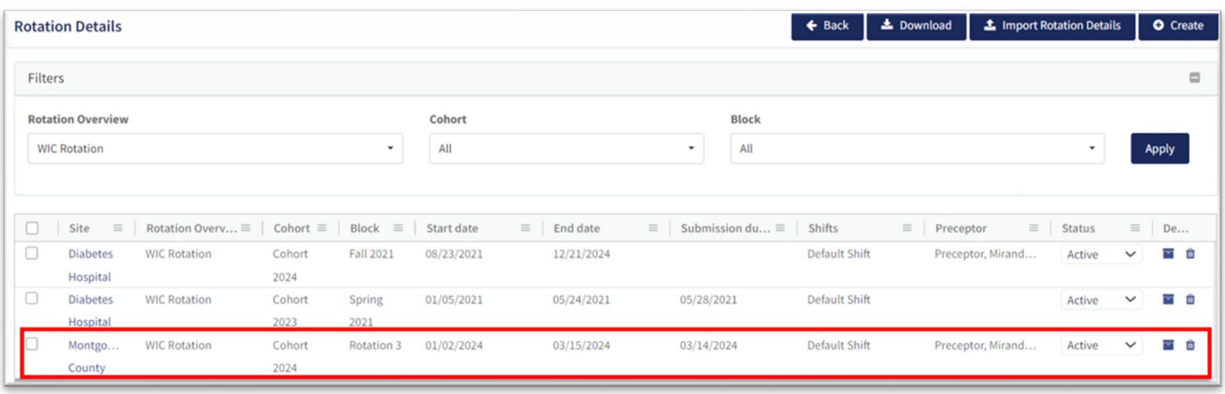
Click the **Students Tab** > **Add Students.**



- **Students** from the **Cohort** selected in **General Information** have been pre-populated for selection.
- **Preceptors** have been populated from the selected rotation site.
- Select a preceptor from the dropdown to assign learners to a specific preceptor.**Note:** Students DO NOT need to be assigned to a preceptor at this time. Preceptor selection may occur later if necessary. To do this, simply select students without first selecting a preceptor.
- Click **Save.**

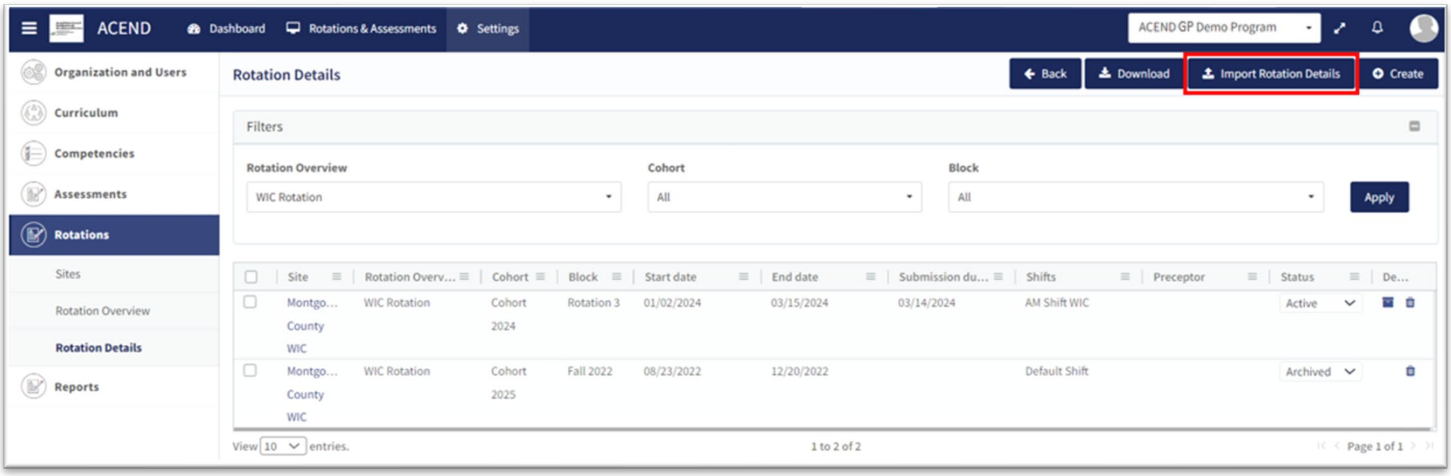


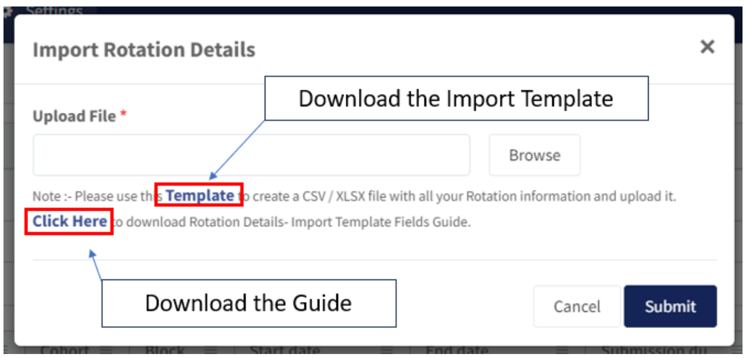
Students and preceptors have now been added to the Rotation Details.



2. Bulk Upload Rotation Details

Click **Settings > Rotations > Rotation Details > Import Rotation Details**.





1. Click the **Template** link to download and complete the **Rotation Details** Template.
2. Complete the template:

	A	B	C	D	E	F	G
1	CampusKey	Student Last Name	Student First Name	Student Email	Primary Preceptor Last Name	Primary Preceptor First Name	Primary Preceptor Email
2							

The **Site Name** in the template above will be used to identify previously created sites within Competency. SPELLING MUST BE EXACT! Please set a standard for your naming process. Importing sites with different spellings under **Rotation Details** will result in duplicate sites.

The template contains many of the same fields found under the tabs for creating **Rotation Details**. The advantage of importing the rotation data in bulk is the ability to upload many rotations at the same time.

3. Save the file as .csv.
4. When ready to upload, click **Browse**, select the completed template file from your computer. Click **Open** and then click **Submit**.

*Please see the **Rotation Details-Import Template Fields** guide below for further instructions when bulk uploading rotations.*

Column Name	Mandatory	Description
Rotation	**Yes**	Select a Rotation Overview for this rotation. Use the EXACT spelling of previously created Rotation Overview.
CampusKey/Student ID	**Yes**	A unique identifier for the learner. This can be their student ID from the university or one that the Program Director assigns.
Student First Name	**Yes**	Student First Name
Student Last Name	**Yes**	Student Last Name
Student Email	**Yes**	Student Email
Cohort	**Yes**	Cohort in which students assigned to this rotation belong.
Phase	**Yes**	Phase
Block	**Yes**	Block
Start Date	**Yes**	Sub-Rotation within a Block (may be the same dates of the Block)– Start Date Date Format – MM/DD/YYYY
End Date	**Yes**	Sub-Rotation – End Date Date Format – MM/DD/YYYY
Enable Mid-Term Assessment	No	Values (Yes, No)
Mid-Term Assessment Due Date	No	Sub-Rotation – Mid-Term Assessment Due Date Date Format – MM/DD/YYYY
Final Assessment Due Date	No	Sub-Rotation – Final Term Assessment Due Date Date Format – MM/DD/YYYY
Site	**Yes**	Site name spelling MUST BE EXACT!
Primary Preceptor First Name	No	Primary Preceptor First Name
Primary Preceptor Last Name	No	Primary Preceptor Last Name
Primary Preceptor Email	No	Primary Preceptor Email
Major	No	Values (Yes, No)
On-Site / Virtual	No	Values (On-Site / Virtual)
Number of Virtual Hours	No	Numeric Value
Number of On-Site Hours	No	Numeric Value

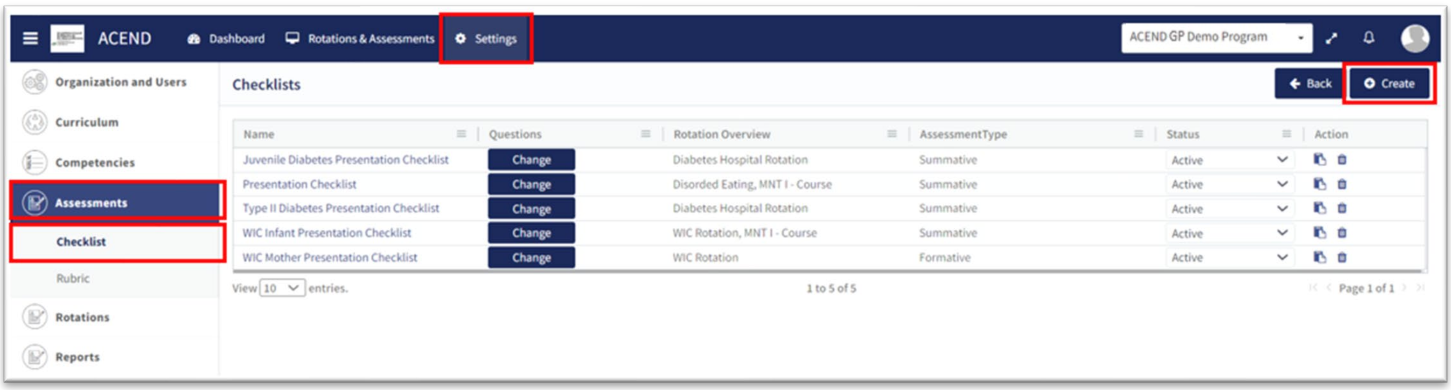
6. Create Assessments

Program Directors create checklists for rotations and rubric assessments for courses in Competency. These assessment questions are then mapped to ACEND competencies, populations and diverse cultures, disease states or conditions and skills.

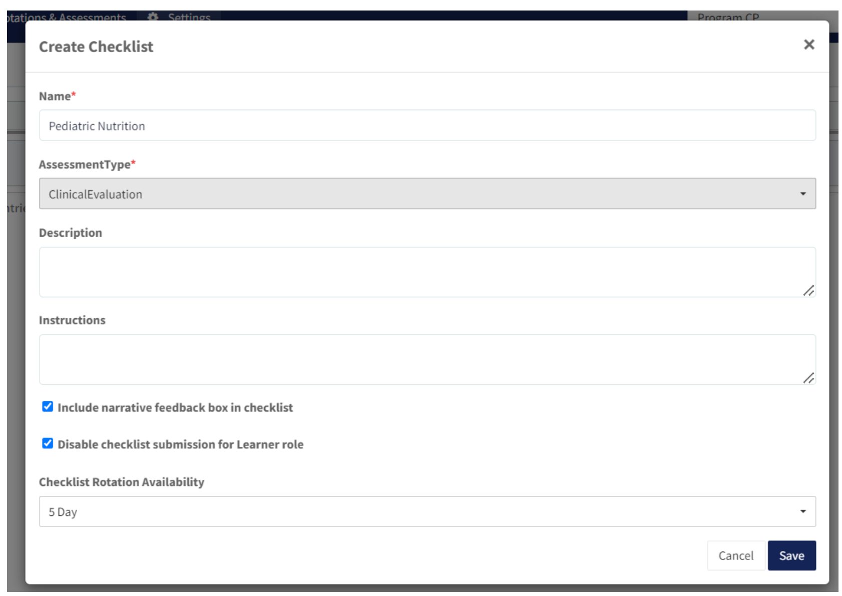
6a. Checklists

Checklists are only available within a rotation. Checklists are commonly used to determine whether the learner can perform certain skills within a rotation. Checklists are used when preceptors evaluate learners or for peer and self-assessments.

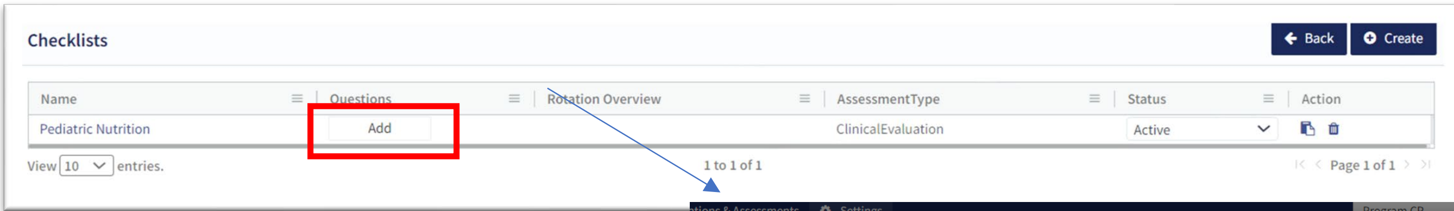
Click **Settings > Assessments > Checklists > Create**

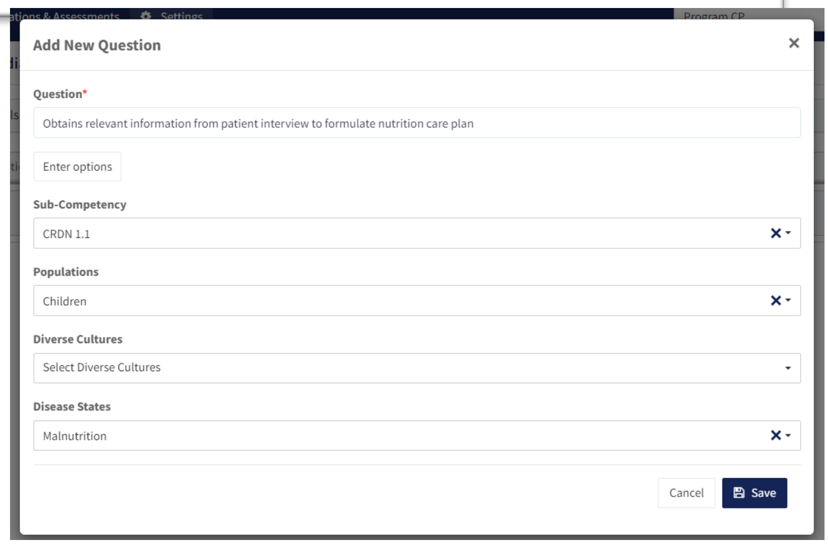


Name	Name the Checklist. Think of this checklist as your original copy. This checklist may be assigned to multiple rotations.
Assessment Type	Select an assessment type (Formative or Summative).
Description	Add a brief description of checklist contents. This is only seen by the Program Director.
Instructions	Add instructions for preceptor completing the checklist.
Include narrative feedback	Check this box to allow preceptors to include feedback comments with the checklist.
Disable checklist	Check this box if you do NOT want learners to complete the checklist. This feature disables this checklist from peer and self-evaluation.
Checklist Rotation Availability	Select how long the checklist should remain available.
Save	Click **Save** to create the checklist.



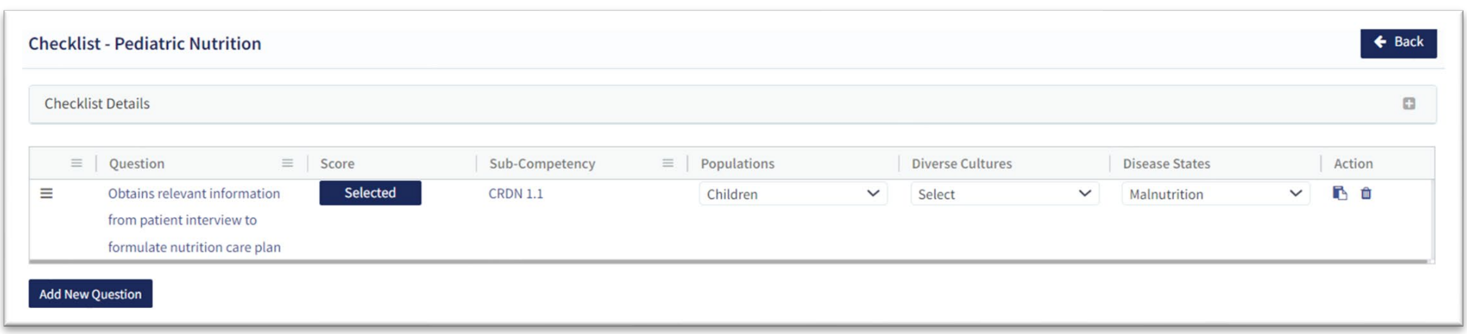
The checklist is now available to edit and map. Click **Add** to add items, such as questions to the checklist.





Question	Create the checklist question.
Enter Options	Click this box to create a set of checklist responses for this question.
Sub-Competency	Map an ACEND Sub-Competency (CRDNs/PIs for GPs) to this checklist question.
Populations/ Diverse Culture	Map populations and cultures to this checklist question.
Disease State	Map a disease state to this checklist question.
Skills (GPs only)	Map skills to this checklist question.
Save	Click **Save** to add new questions.

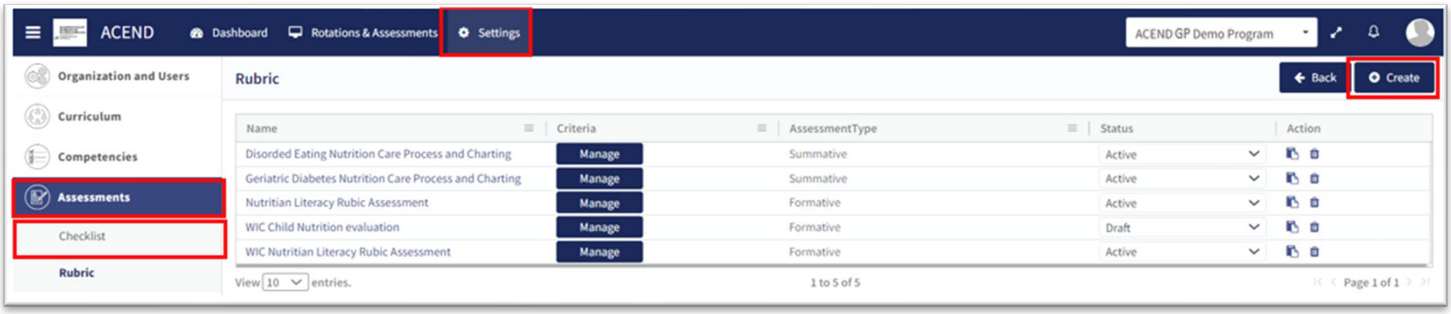
A new question has now been added to the checklist. Questions may be edited and re-mapped from the checklist details page.



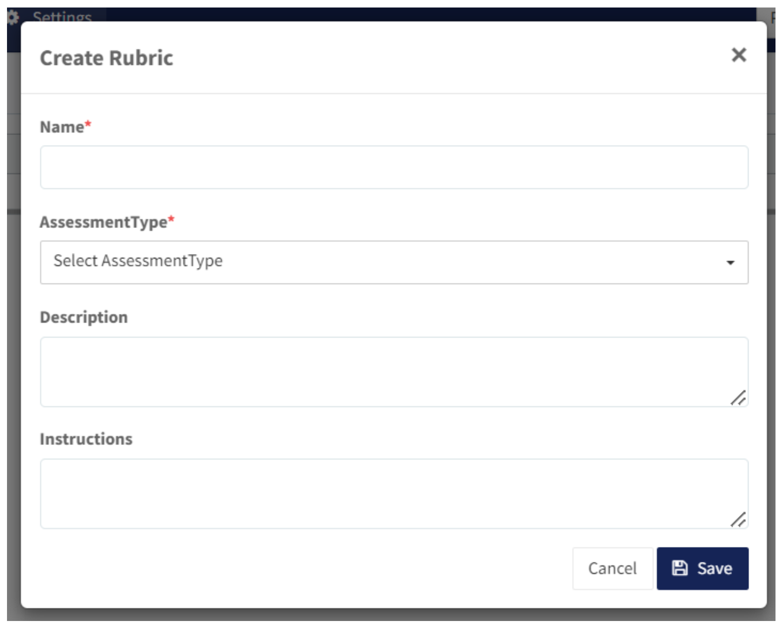
6b. Rubrics

Rubric assessments can be assigned to a rotation or a course. **Note:** Rubrics can only be used on a desktop and are not available to complete in the Competency app.

Click **Settings > Assessments > Rubrics > Create.**

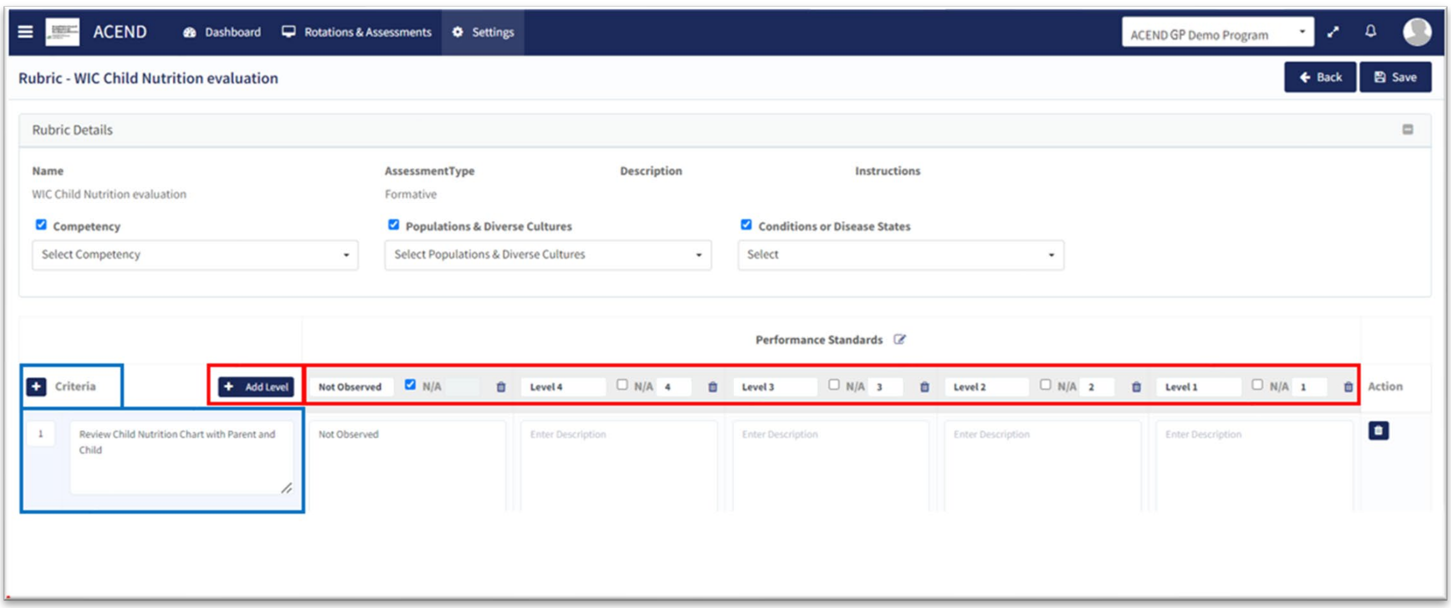


Name	Name the rubric. Think of this rubric as your original copy. This rubric may be assigned for multiple assessments. At the time of assessment, this rubric can be given a specific assignment name. For example: the *WIC Child Nutrition Evaluation* may be renamed *WIC Child Eval Spring 2024* when assigned.
Assessment Type	Select an assessment type from the dropdown menu provided. ACEND **Assessment Types** may be formative or summative.
Description	Add a brief description of rubric contents. This is only seen by the Program Director.
Instructions	Add instructions for the evaluator completeing the rubric.
Save	Click **Save** to create the rubric.

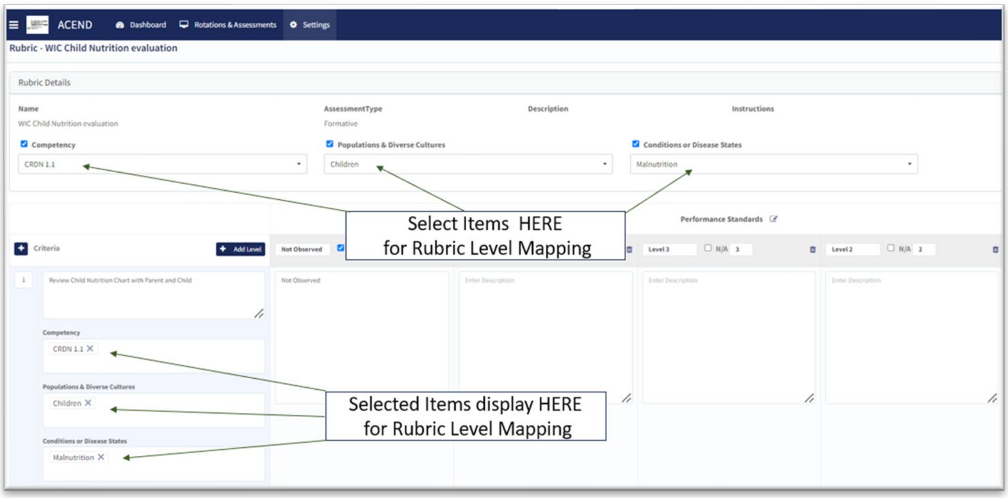


The rubric is now available to edit and map:

1. **Formatting the Rubric**:
   - Create and edit scoring levels, standards labels, and point values depending on your program's method for evaluation.
   - Click **Add Level** to create additional scoring levels.
   - Select **N/A** to create a "Not Applicable" option.
   - Enter **Description** to define the scoring criteria. For example:
     - Not Obsesrved, Beginning, Emergent, Proficient, Advanced
     - Not Applicable, Level 1, Level 2, Level 3, Level 4
   - Click **Criteria** to create additional scoring criteria
   - Competency offers the option to apply the same mapping to the entire rubric (Rubric Level Mapping) or individual criteria (Criteria Level Mapping).

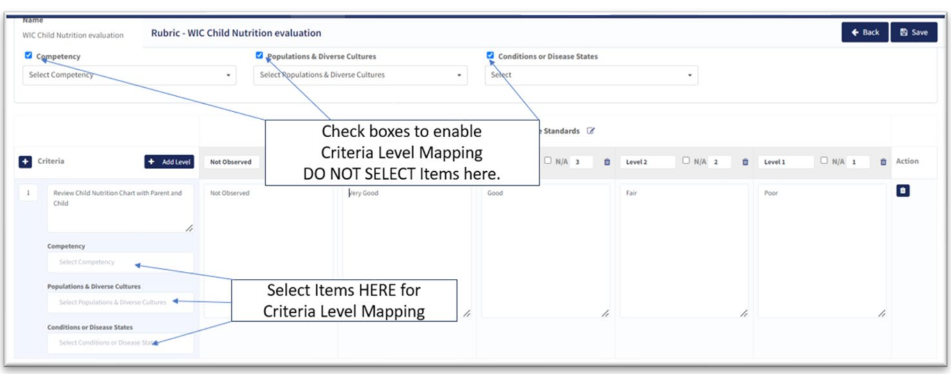


2. **Rubric Level Mapping:**
   Click the **competency, populations** and/or **conditions or disease states** checkbox.
   - Select **sub-competencies, populations** and/or **conditions or disease states** from the dropdown menu.
   - All criteria in this rubric have now been mapped to these **competencies, populations** and/or **conditions or disease states** Click **Save**.

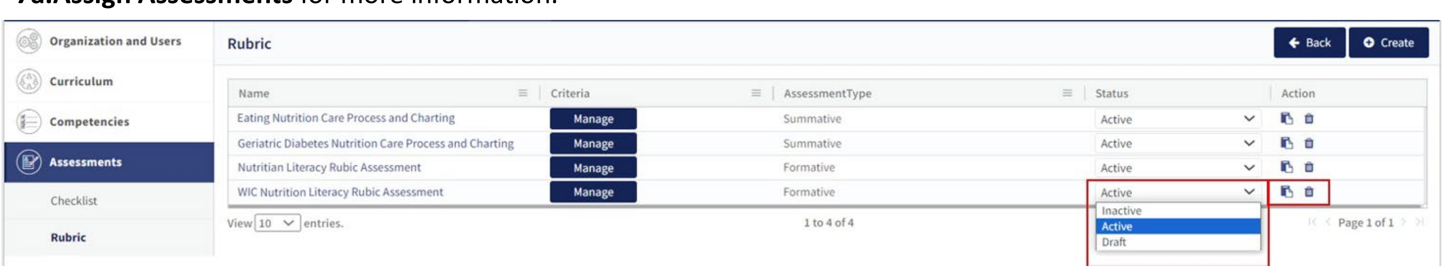


3. **Criteria Level Mapping:**

   Click the **competency, populations** and/or **conditions or disease states** checkbox. Selecting the checkbox enables selection boxes for EACH criteria (rather than the entire rubric). Click within the newly opened **competency, populations** and/or **conditions or disease states** box for each criteria to select the appropriate mapping for each item. Repeat this process for each criteria item. Click **Save**.



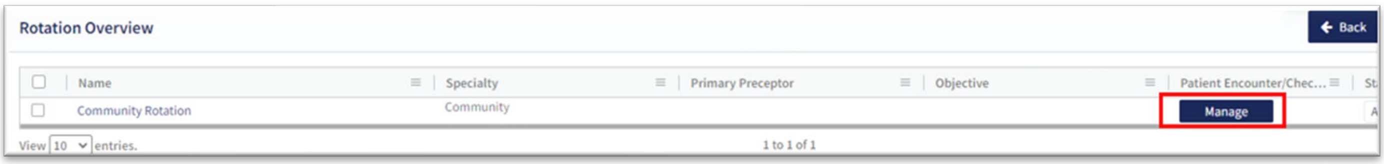
When all mapping is complete, return to the rubric list and make the rubric **ACTIVE**. The rubric cannot be assigned in a **Draft** or **Inactive** status. From this page you may also **Copy** or **Delete.** The rubric is now ready to be assigned. See **7a.Assign Assessments** for more information.



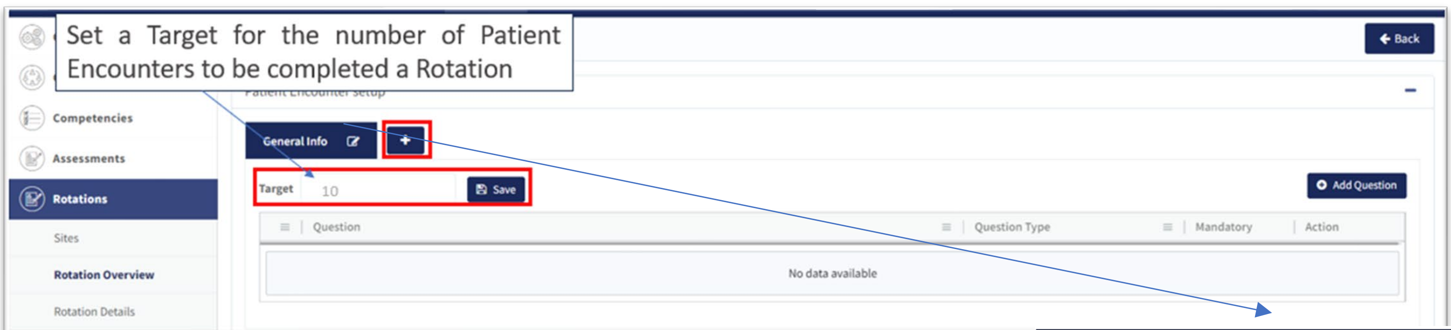
6c. Patient Encounter Notes

Patient Encounter Notes are uniquely tied to rotations. They are stored in **Rotation Overview** as part of the rotation and can be managed from this page. Their purpose is to track and measure student interactions with patients and can be used to track items such as **Populations and Diverse Cultures** or **Conditions or Disease States**. It is not an ACEND requirement and programs may choose to use this feature according to their specific program needs. If a **Patient Encounter Note** is NOT available, click the **Rotation Overview Name** and then check **Enable Patient Encounter Note.**

Click **Settings > Rotations > Rotation Overview > Manage.**

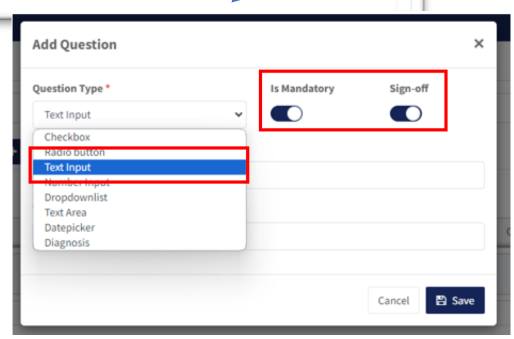


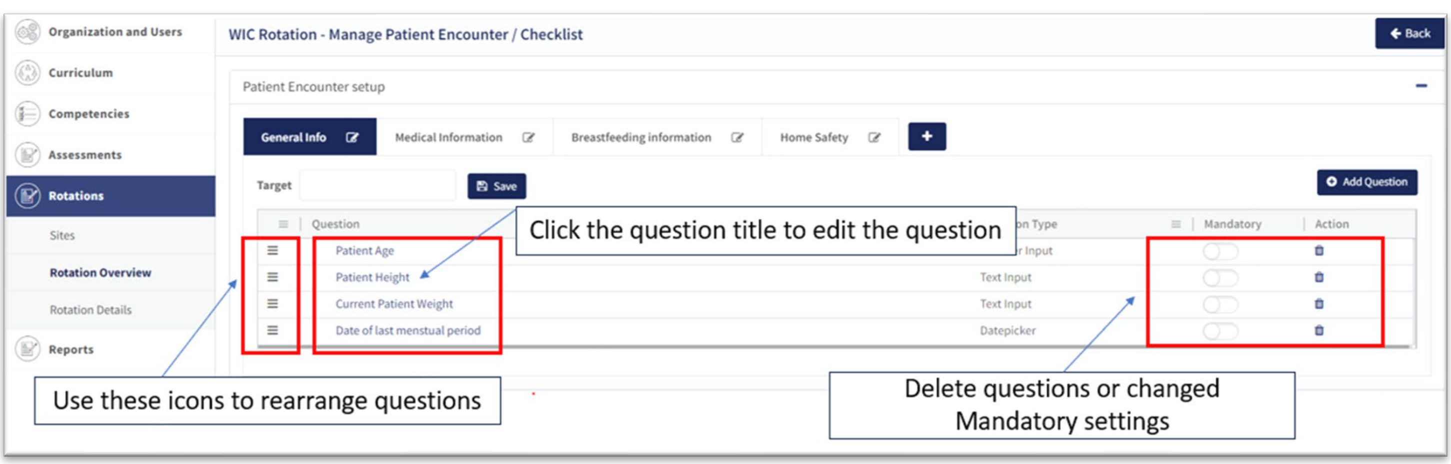
Create/Edit Category Names and Descriptions for Sections within the Patient Encounter Note
The **Patient Encounter setup** field is now available. Click **+** to create a new category within the patient encounter.



Click **+ Add Question** to create a new question within a category of the patient encounter

- Select the question type and select if mandatory or preceptor sign off required.
- Create a **Question Title** and fill out a **Target** if desired. Click **Save.** The Patient Encounter Note is now created and associated with this **Rotation Overview**.





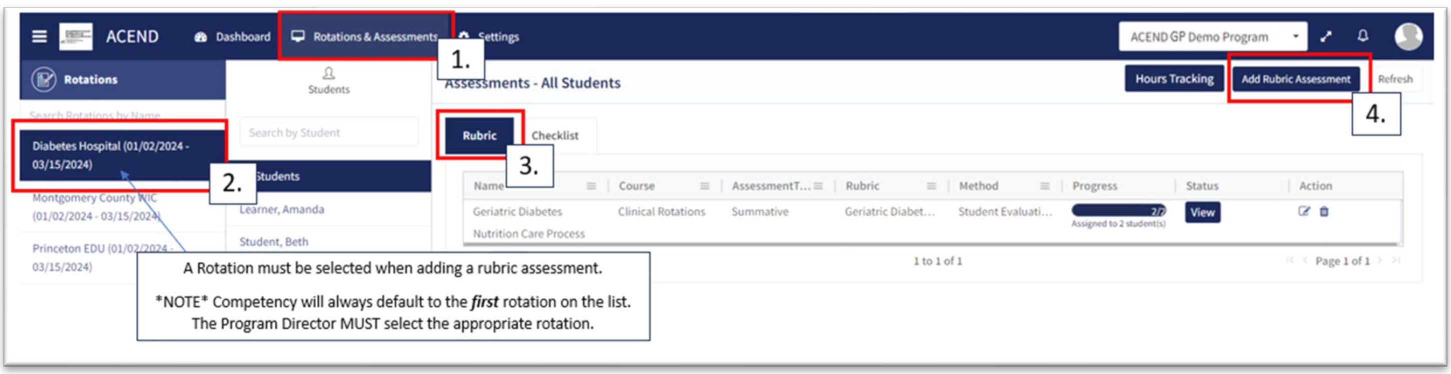
7. Assign Assessments

Assessments are assigned by the Program Director. There are seveal different **Assessment Types** available in Competency:

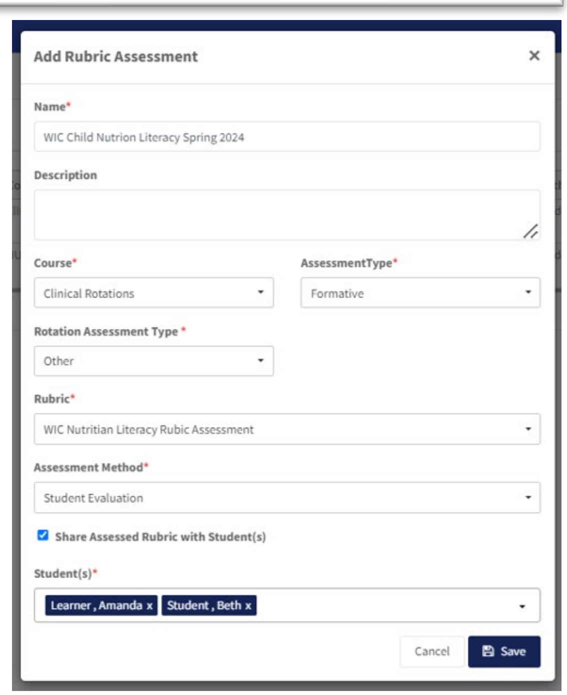
Rubric Assessments	Completed by Preceptor Roles (includes Faculty) through the Comptency website. Self and Peer rubric evalautions are also available on the Competency website. Rubrics are **not** available on the Competency app.
Checklist Assessments	Assigned as a Student Evaluation, Self Evaluation, or Peer Evaluation through rotations. They are to be completed on the Competency app or website.
Patient Encounter Notes	Assigned with the rotation and completed by students in the Competency app. They are created as part of a rotation.

7a. Assign Rubric Assessments

Click Rotations & Assessments > Select a Rotation > Rubric> Add Assessment.



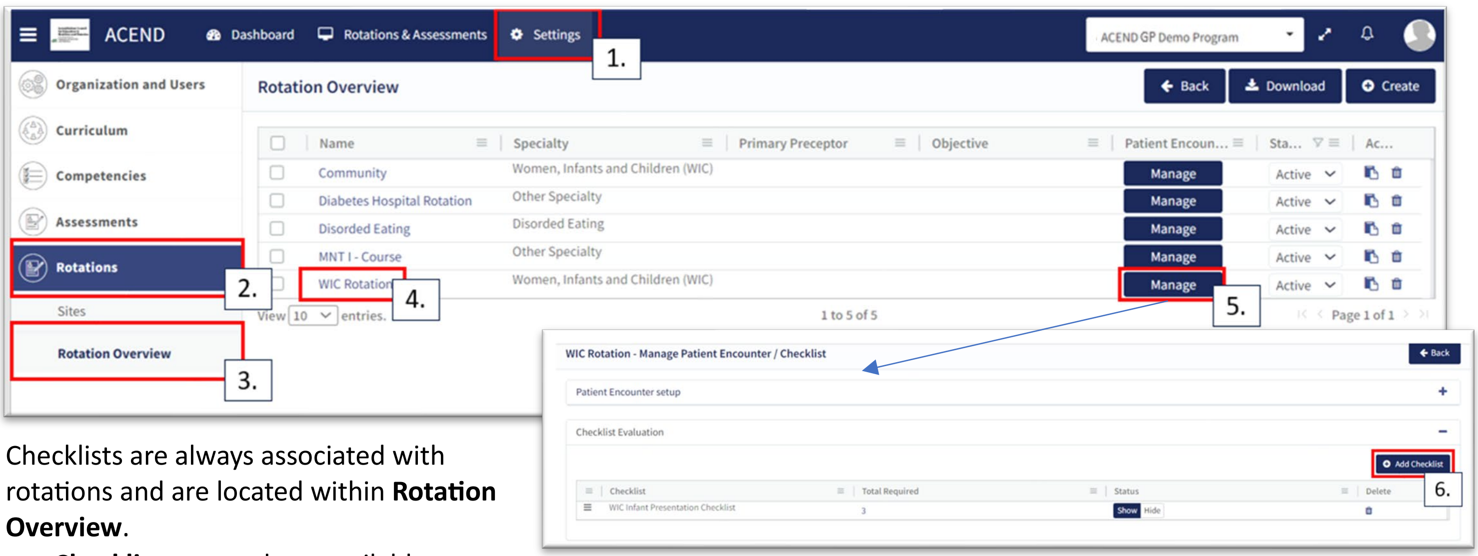
Name	Name the assessment. Every assessment must be given a unique name.
Description	Add a brief description of the assessment.
Course	Assign this assessment to course. This determines how the assessment will be displayed under the "Course" tab on the Competency dashboard.
Assessment Type	Select an assessment type from the dropdown menu provided. ***Note:*** This determines the rubrics available in the dropdown menu below and how the assessment will be displayed under the "Assessment Type" tab on the Competency dashboard.
Rotation Assessment Type	Rubrics are reused many times during the course of a rotation. Select if this is a Mid-Term, Final, or Other rotation.
Rubric	Select a pre-created rubric from the dropdown menu. *Competency is only showing rubrics created under the Assessment Type selected above.*



Assessment Method	Student Evaluations are performed by a preceptor, including faculty members assigned in a preceptor role. Self and peer evaluations are performed by students.
Share Assessed Rubric with Students	Share the full rubric details including comments with students upon completion. **Note: Selecting to Share Assessed Rubric with Students turns off the "Reassess Learner" function. Deselect this option if students need to be reassessed or rubrics need to be updated.**
Students	Select students assigned to this rotation. You may include all students from the rotation OR just a select few. If you do not see the expected students, make sure you have selected the correct rotation. Review **Rotation Details** to edit the student list.
Save	Click **Save** to add the assessment.

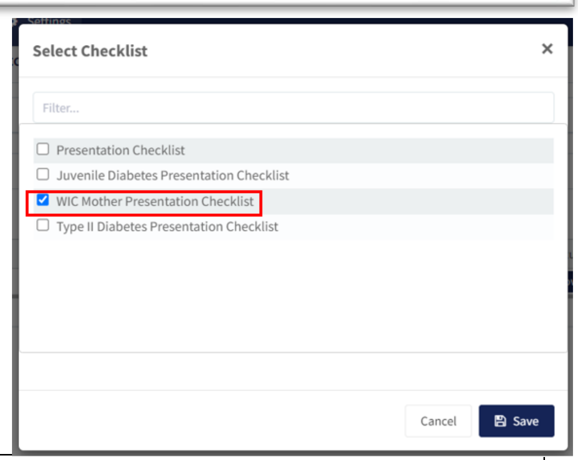
7b. Assign Checklist Assessments

Click **Settings > Rotations > Rotation Overview > Select Overview> Manage> Add Checklist**



Checklists are always associated with rotations and are located within **Rotation Overview**.

- **Checklists** created are available to add to the **Rotation Overview**.
- Use the **Filter** to search available checklists.
- If no checklists are available, see **Create a Checklist** section.
- Multiple checklists may be added to a single rotation.
- Click **Save.**



The checklist has now been added to the **Rotation Overview** and will be available in the Competency app everytime this **Rotation Overview** is used in **Rotation Details.**

Total Required	Set the target number of required checklists for this rotation. This number may vary.
Is Feedback	Indicates this checklist should be used for student feedback.
Checklists	Checklists created for this program are available to add to the **Rotation Overview**.

7c. Assign Patient Encounter Notes

Click **Settings > Rotations > Rotation Overview.**

Once a **Patient Encounter Note** is created in a **Rotation Overview**, it will always be available to use in any rotations assigned to that **Rotation Overview**. See **Patient Encounter Notes** section for more information.

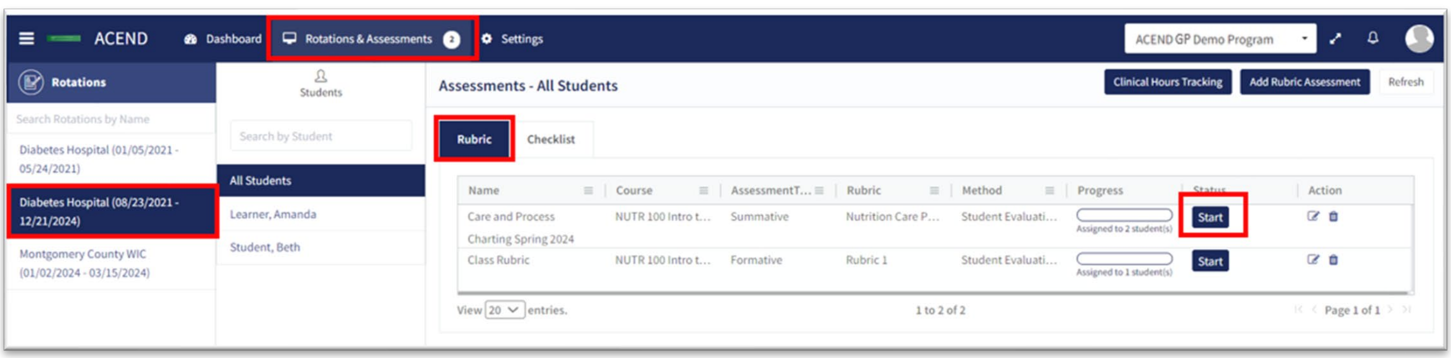
8. Complete Assessments

All roles may complete evaluations in Competency.

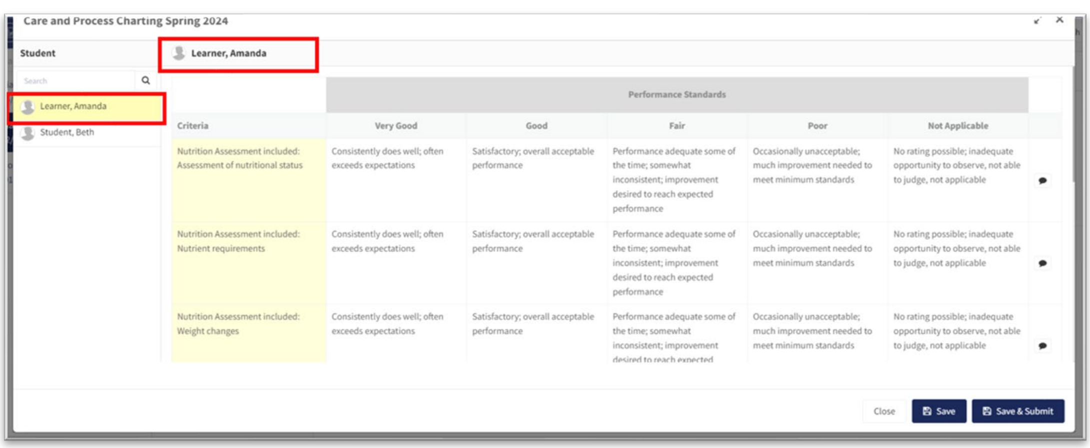
Program Director	Program Directors have role permission to complete any student assessments.
Preceptor (includes Faculty)	Preceptors have role permissions to complete student assessments which have been assigned to a specific preceptor/faculty.
Student	Students have role permission to complete self or peer assessments which have been assigned to a specific student.

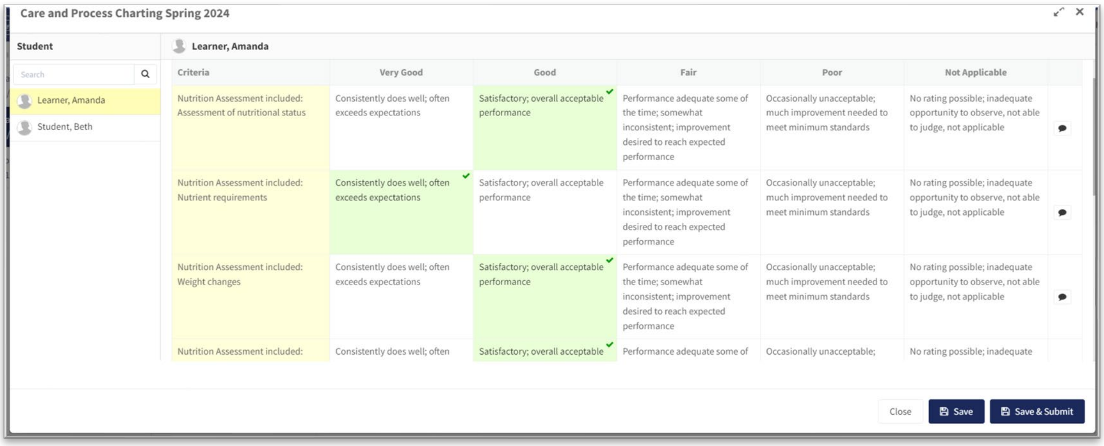
8a. Complete Rubric Assessments

At this time, rubric assessments can only be completed on the ACEND Competency website; they cannot be completed through the Competency app. To complete a rubric, click **Rotations & Assessments > Select a Rotation > Rubric > Start.**



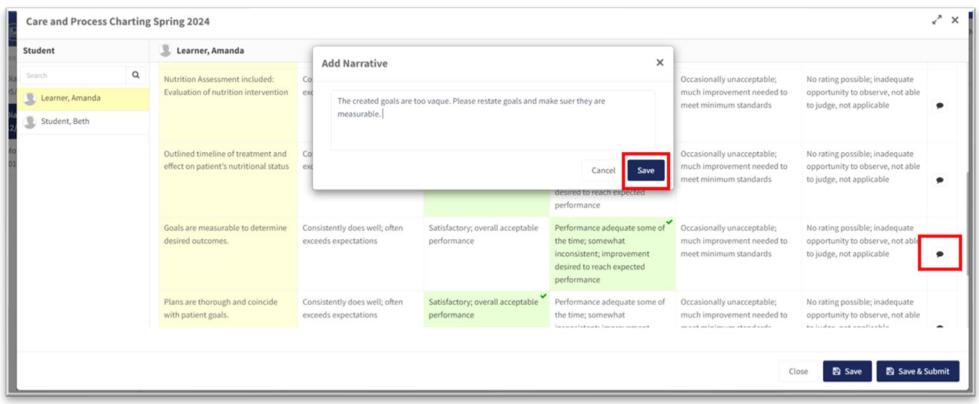
- The rubric assessment is now open in a pop-up window.
- The student being evaluated is highlighted in yellow.
- The student name is also displayed at the top of the rubric pop up screen.



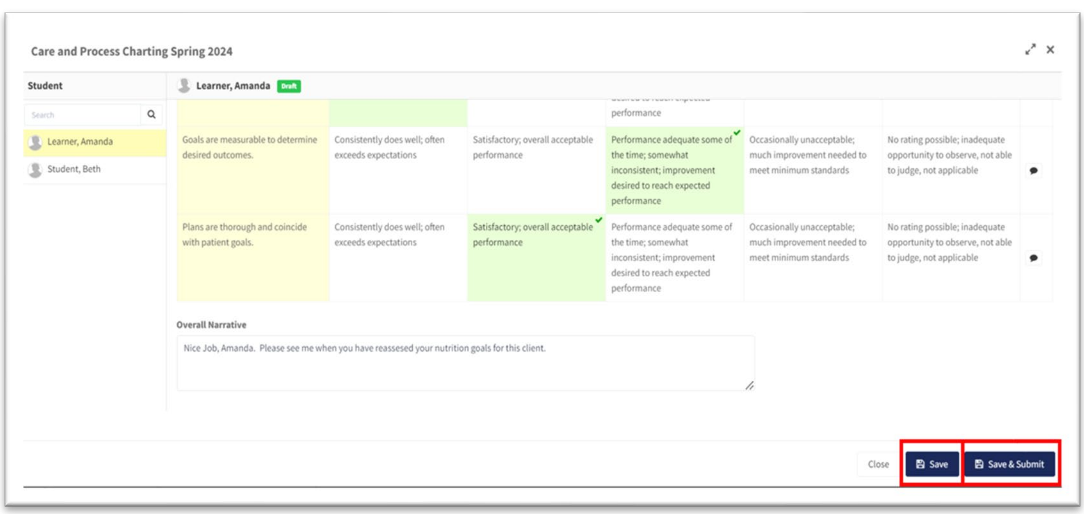


- Evaluate the student.
- Click a performance standard for each criteria on the rubric assessment.
- Performance standards highlight in green as they are selected.

- Add criteria-level line item narratives by clicking the comment bubble.
- Click the **SAVE** button in the **Add** narrative pop-up to save the criteria level line item narrative in the rubric.

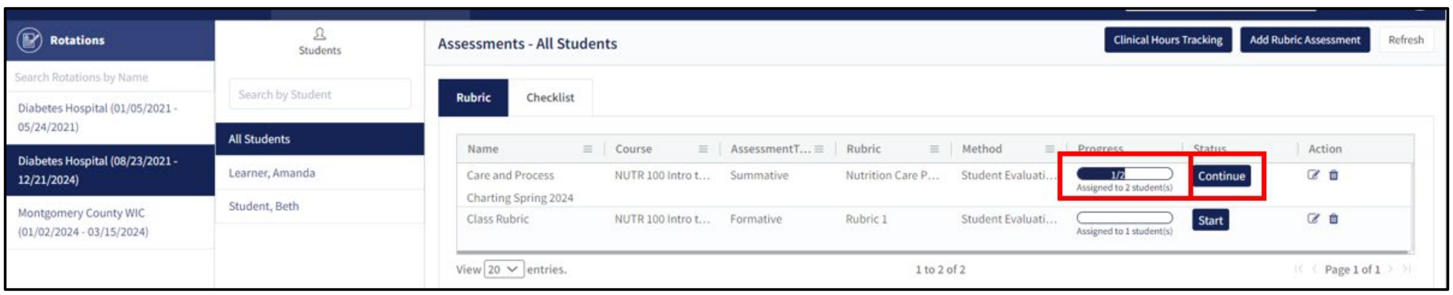


- Click the **SAVE** button to save the rubric evaluation.
- **SAVE** allows the evaluator to return to the evaluation for edits and make updates at a later time.
- **Save & Submit** is a final submission. The **Save & Submit** button DOES NOT allow for reassessment or edits to the rubric evaluation. If an error was made on the evaluation, a new rubric assessment will need to be completed.

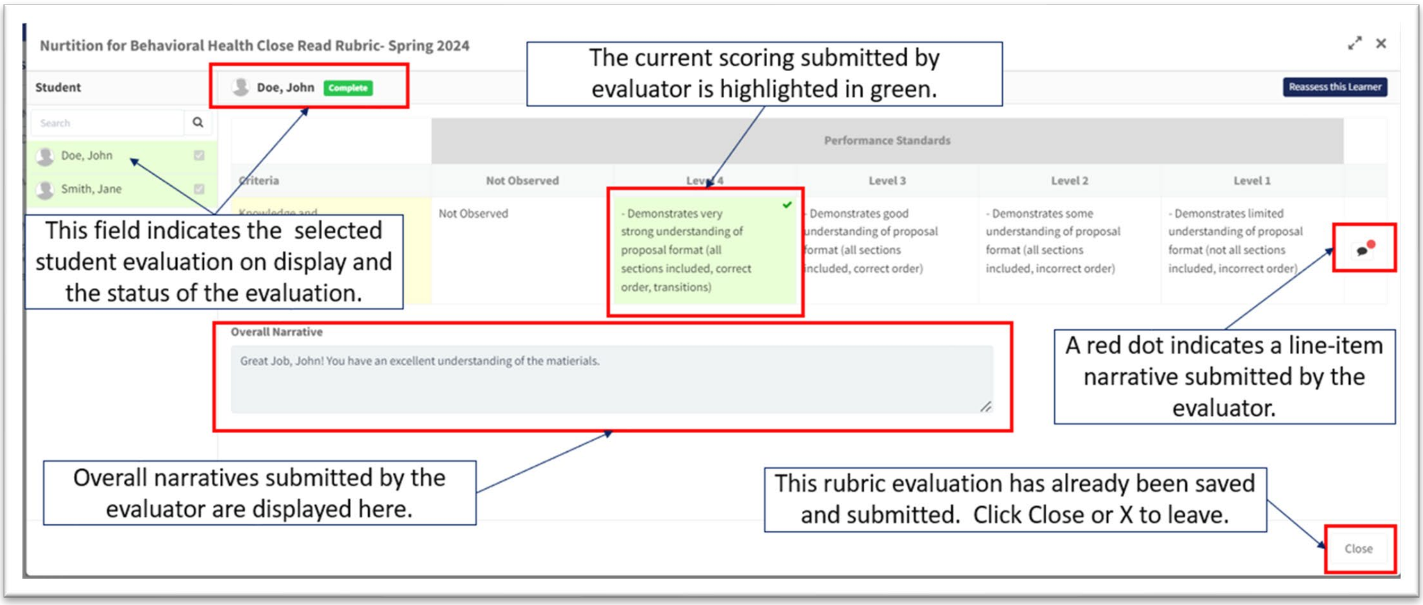


- Completed student evaluations are now highlighted in green.
- The evaluator is now able to evaluate another student on the list of students assigned to this rubric evaluation.

The **Rotations & Assessments** tab now shows the rubric assessment in progress for students in this rotation. Click **Continue** to continue the rubric evaluations for this rotation.



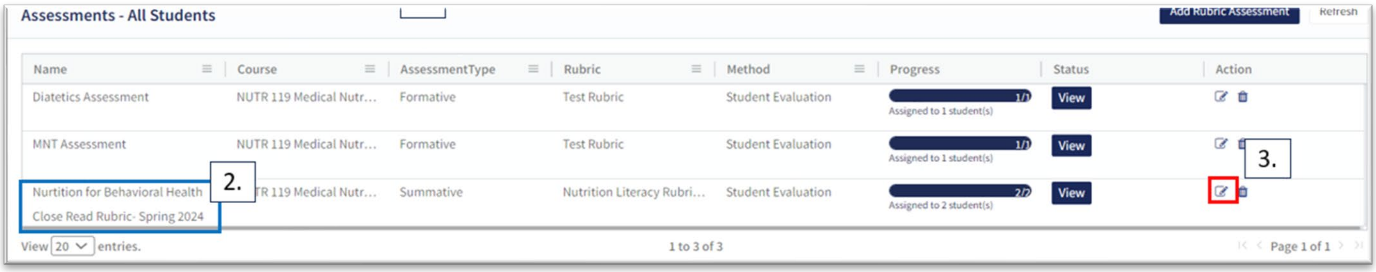
To review completed Rubrics, click **Rotations & Assessments >** Find the Rubric **> View**
View the completed Rubric Assessment.



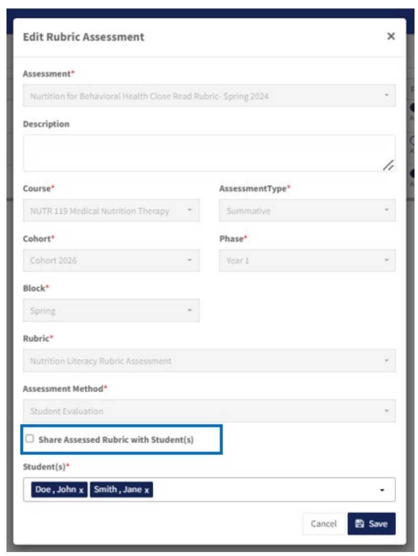
8b. Reassess A Learner

Selecting to reassess a learner means the Program Director is choosing to eliminate the current **Rubric Assessment** for a student and replace it with a new **Rubric Assessment**. Once the Program Director selects “Reassess This Learner” the previous Rubric Assessment (including all comments or narratives created by the original evaluator) are *eliminated and replaced* by the new **Rubric Assessment**.

To reassess a learner, click **Rotations & Assessments >** Find the Rubric **>** click the **Edit icon**



Verify that the rubric is NOT shared with students. Deselect “shared with learners” if it is selected. *Students cannot be reassessed while the rubric is shared*. Program Directors can re-share with students once reassessment is completed. Click **SAVE.** Then, select the Rubric to be reassessed. Follow the same steps taken to view a completed rubric.



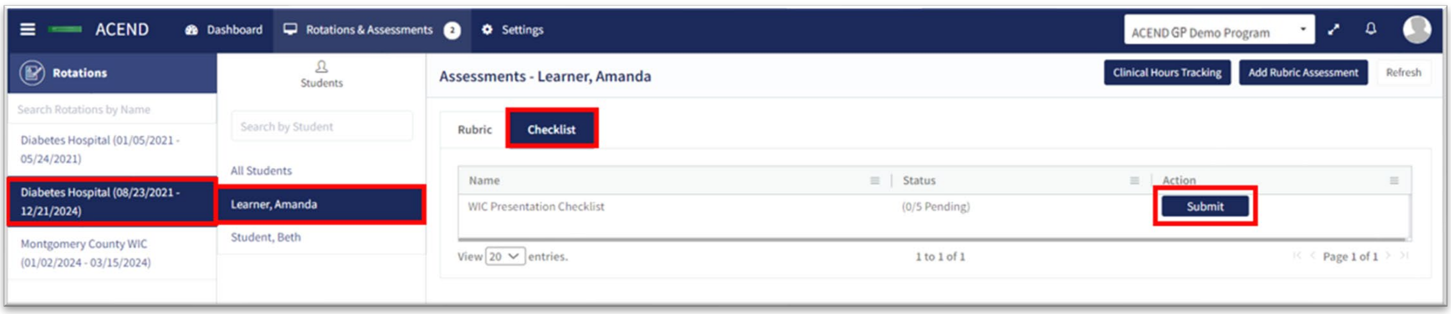
Click **Reassess This Learner** to complete a new rubric for this learner.
Click **Proceed** to confirm that you want to delete all previous selections and reassess this learner.
Reassess the learner, add comments, then **Save & Submit.**

8c. Complete Checklist Assessments in the Competency Website

Once a Checklist has been created, mapped, added to a **Rotation Overview**, and assigned to a rotation it can be completed online or in the Competency app*.

**Please see 8c. to complete checklist assessments in the Competency app.*

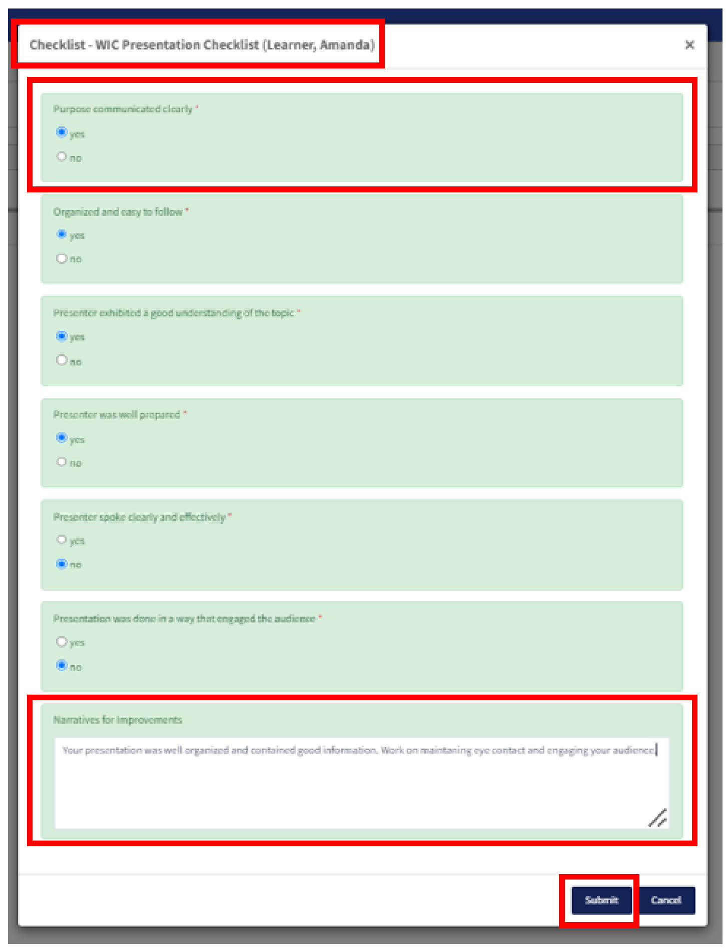
Click **Rotations & Assessments > Select a Rotation > Select a Student >** Click **Checklist > Submit**



<u>Complete the Checklist</u>

The checklist assessment is now open in a pop-up window. The student being assessed is named at the top of the checklist pop-up screen. Checklist items highlight in green when selected. Narratives for improvement can be added at the bottom of every checklist. Click **SUBMIT** to complete the assessment.

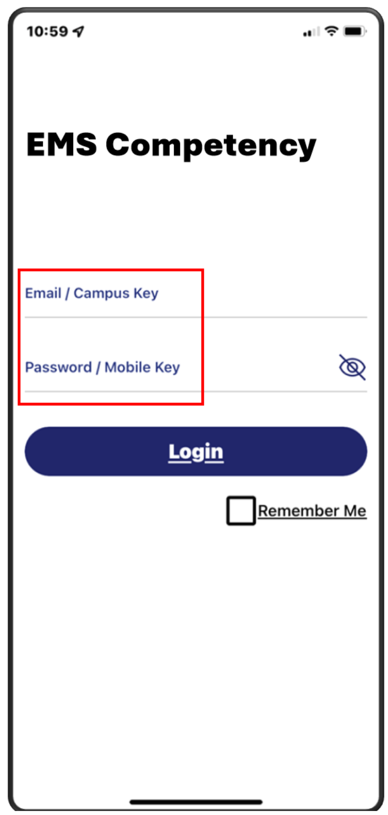
Note: Checklists DO NOT offer a Save & Submit option. **All checklists submissions are final**. If an error was made on the checklist, evaluators may return to the **Rotation & Assessments** tab to complete another checklist. Add a narrative to the checklist indicating the need for re-evaluation.



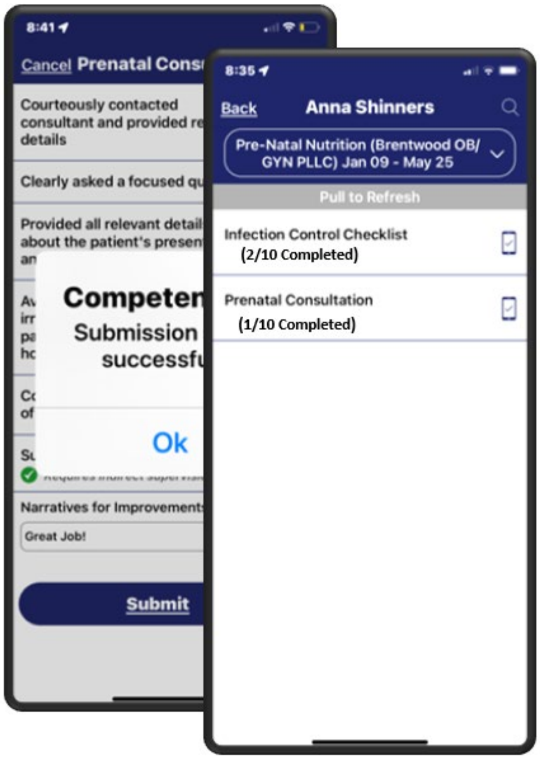
8d. Complete Checklist Assessments on a Mobile Device in the Competency App

Download the free Competency App in the App Store for iOS or Android. Login using the email address and password created in the Competency website. If you have forgotten your password, go online to the ACEND Competency website at https://acend.competency.ai/login and use the reset password function.

*You must have an active email and password in the ACEND Competency Website to login to the the Competency app. If you forgot your password, select **Forgot Your Password** to reset.*



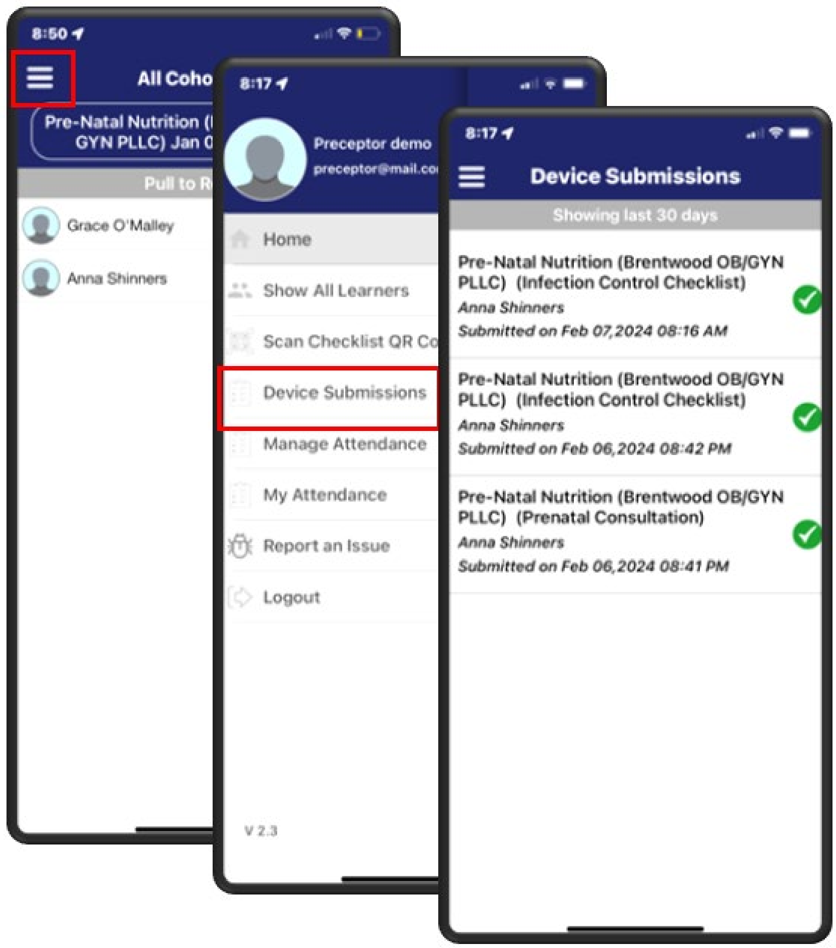
To complete a checklist, select the rotation you are assigned to. Then select the student you are precepting. An evaluation list will population. Select the evaluation you need to complete. Ensure you answer every required question. Then click **Submit.**



Competency provides an automatic notification that your checklist has been successfully completed and submitted.

The checklist completed submission count (2/10 Completed) is also updated for the student on their dashboard. Program Directors, Preceptors, and Students will also see this progression on the app.

To verify all submissions from the app, click **Menu> Device Submissions**. Competency provides a list of submissions from this device for the last 30 days.



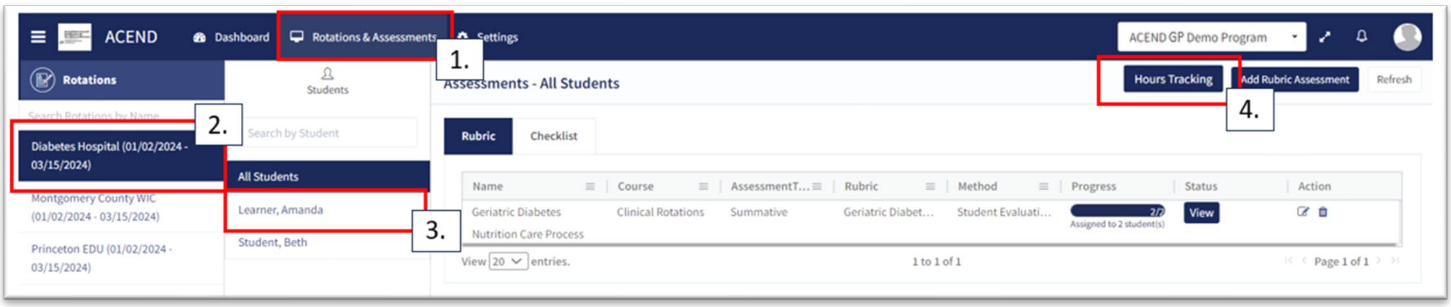
9. Approve/Review Supervised Hour Submissions

An email notification is sent to the Program Director and Preceptor when a student submits hours completed during a rotation. The process for submitting hours in the Competency website and in the Competency app is found in the Student User Guide.

Program Director	Approve hours submitted by students and run reports to review approved hours
Preceptors	Approve hours submtted by students

9a. Approve Hours

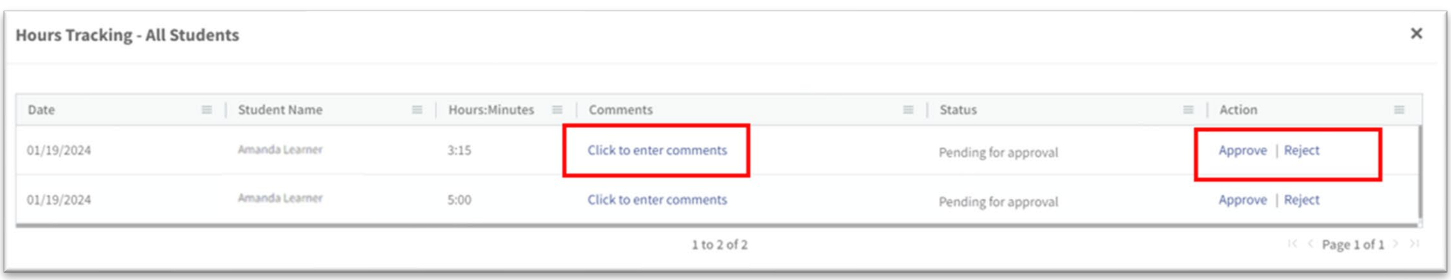
Click **Rotations & Assessments** > Select a **Rotation >** Select a **Learner> Hours Tracking.**



Hours submitted are submitted in 15 minute increments. For example, hours submitted by this student are now displayed in the pop-up window.

- Comments submitted by this learner display in the the **Comments** column.
- Click the comment to edit the student comment or to add your own comment.
- **Approve** or **Reject** the submitted hours.

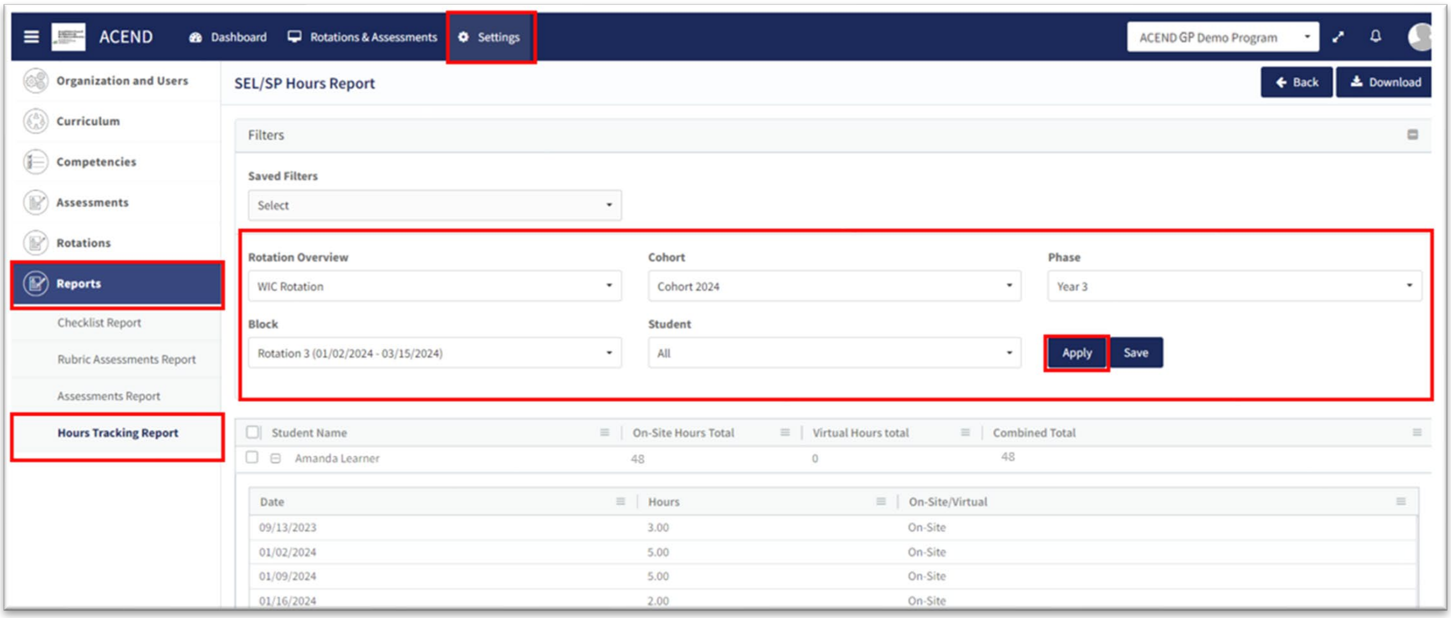
The student recieves an email notification when hours have been **Approved** or **Rejected.**



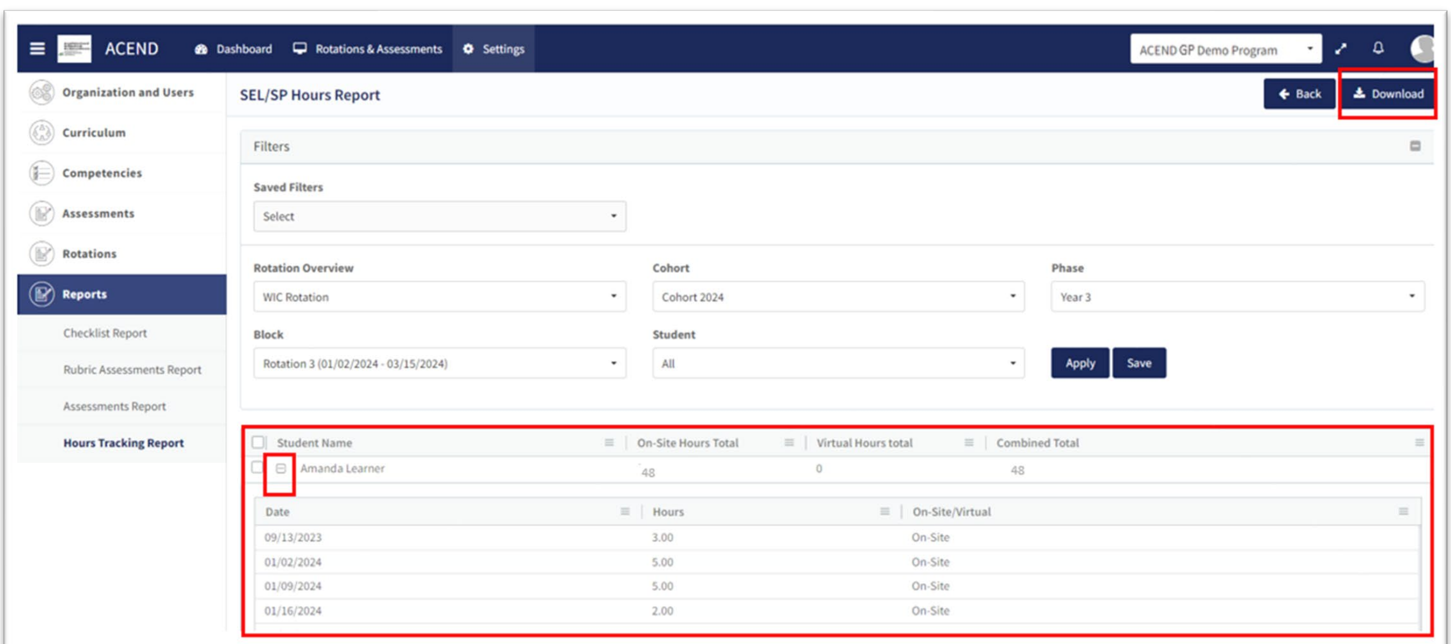
9b. Review Approved Hours

Click **Settings > Reports > Hours Tracking Report**

- Use the dropdown menus to select the **Rotation, Cohort, Phase, Block, and Student** to view a specific report.
- Click **Apply** to view.



- Approved learner hours are now displayed.
- Click the **+** next to each learner name to view hours tracking details.
- Click **Download** for an Excel Hours Tracking Report.



10. Reports

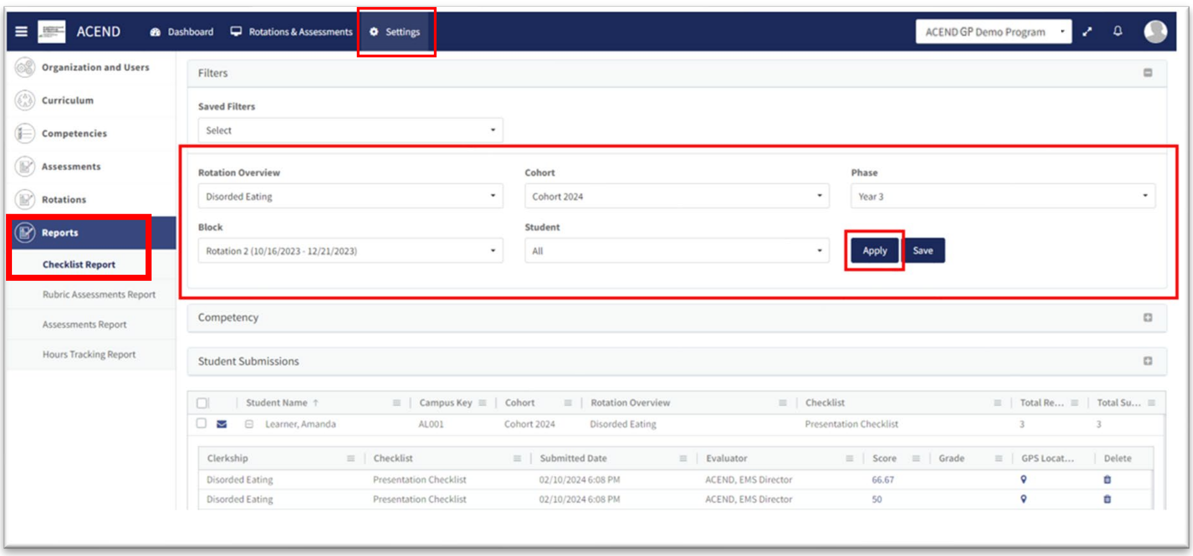
Reports are found in Settings and only available to Program Directors.

10a. Checklist Reports

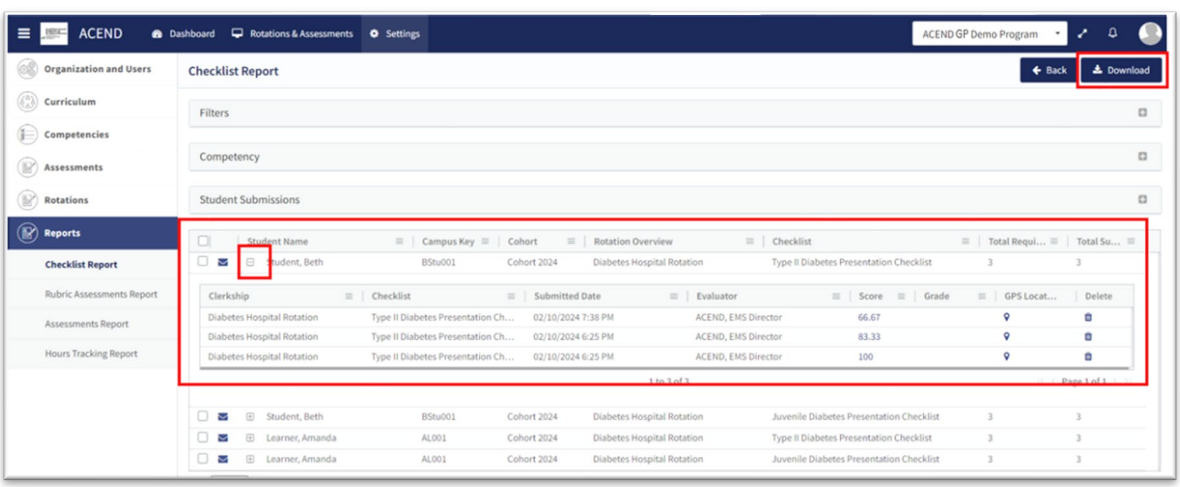
Preceptors complete checklists on learners as they progress through rotations. Students and Preceptors can view these completed checklists on their Competency dashboards on the website or the Competency app. The **Checklist Report** provides a comprehensive list of all checklists completed during a rotation and the grade received.

Click **Settings** > **Reports > Checklist Report**

- Use the dropdown menus to select **Rotation Overview, Cohor, Phase, Block** and **Student** information.
- Click **Apply** to apply these parameters to the **Checklist Report**.



- Click **+** next to a learner name to open report details.
- Click **Download** to download an Excel file of this report.

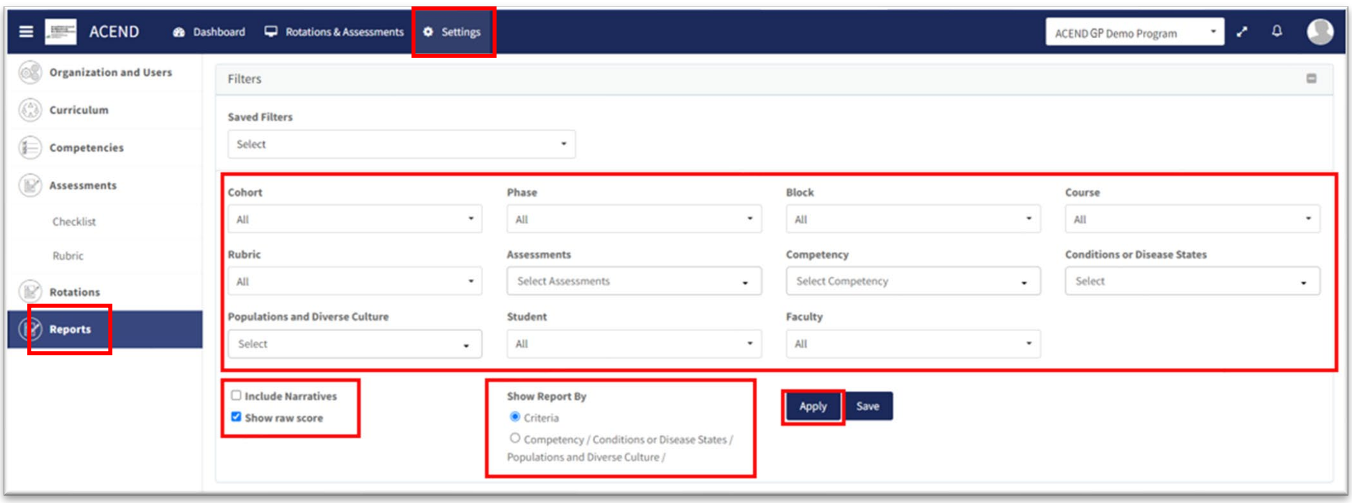


10b. Rubric Assessment Report

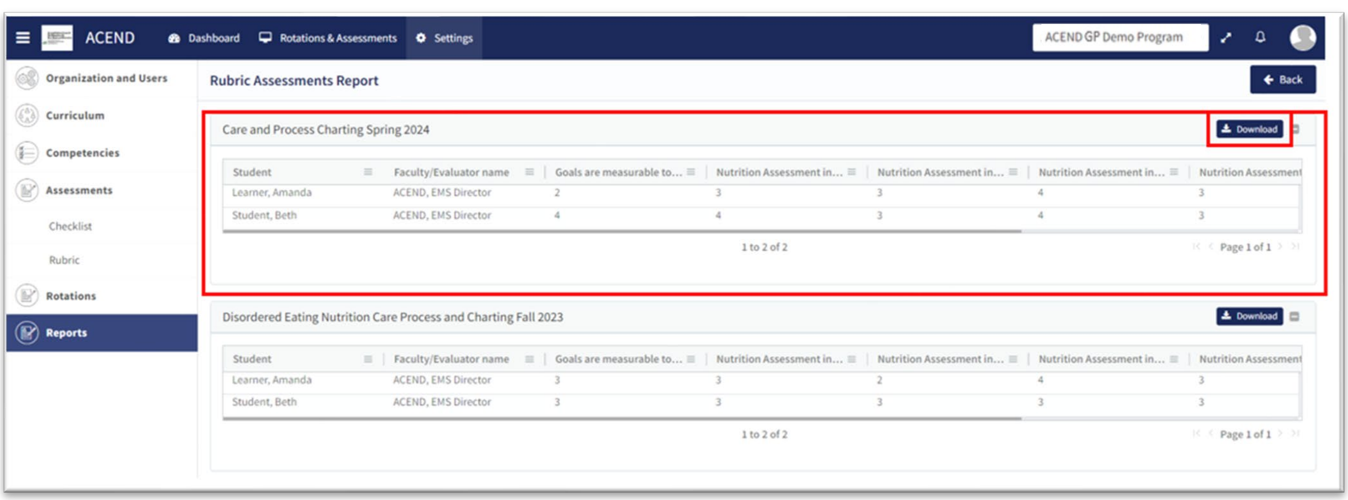
Preceptors (including Faculty) complete rubrics on learners as they progress through courses or rotations. Students and Preceptors can only view these completed rubrics on their Competency dashboards on the website via desktop (this cannot be viewed in the app). The **Rubric Report** provides a comprehensive list of all rubrics completed on learners during a course and the grade received.

Click **Settings > Reports > Rubric Assessment**

- Use the dropdown menus to select available options.
  - Check "Include Narrative" to view criteria and assessment level comments
  - Criteria level scoring defaults to a percentage (ex: 0-100%). To view the rubric levels (ex: 1-4) select "Show Raw Score."
  - Use the radio buttons for criteria (Assessment Questions) or mapped items (Competencies, Diverse Cultures, etc.) to sort the report view.
- Click **Apply** to view the report.



This is what the **Rubric Assessment Report** summary looks like. It displays the student name, the preceptor who completed the rubric, and the ratings for each student.



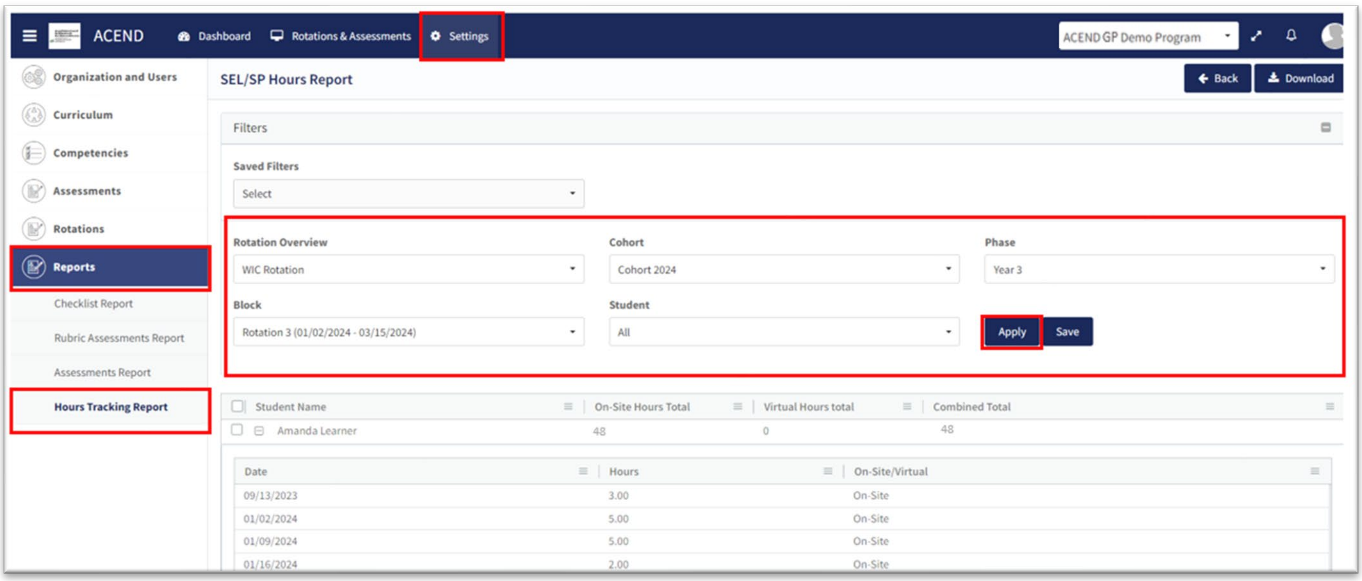
- The rubric report is now avaialble to view and download.
- Click **Download** for an Excel Rubric Assessment Report.

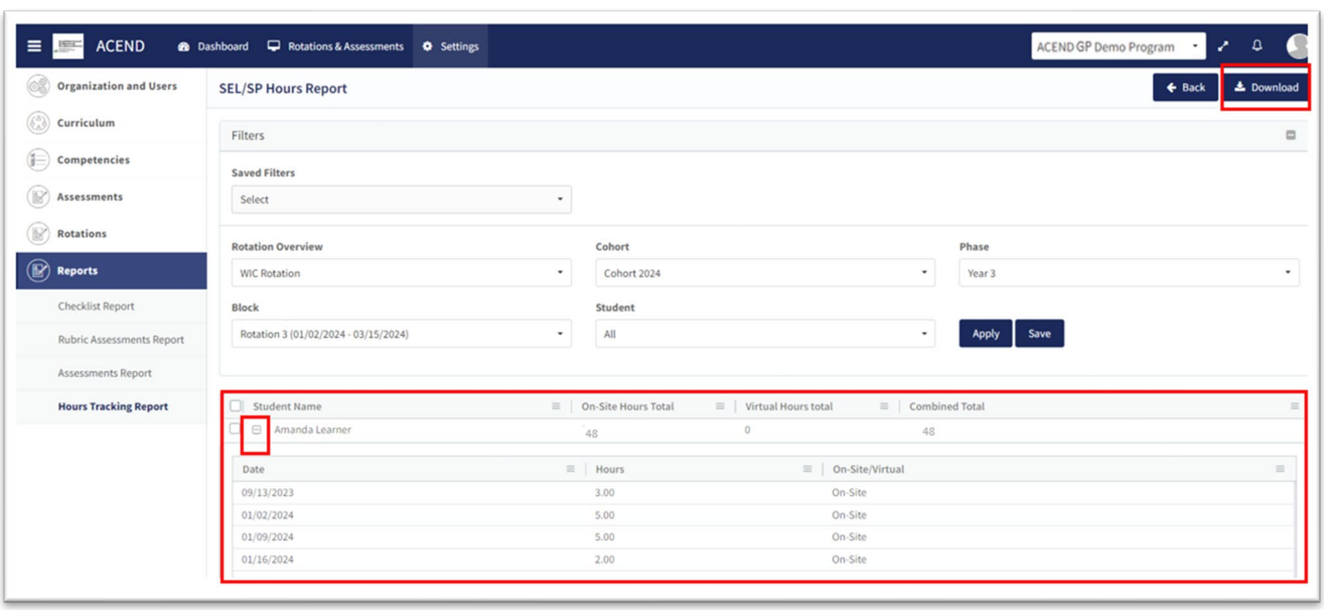
10c. Hours Tracking Report

Program Directors can view completed hours tracking reports on their Competency dashboards on the website. The report provides a comprehensive list of all hours completed.

Click **Settings > Reports > Hours Tracking Report**

- Use the dropdown menus to select the Rotation, Cohort, Phase, Block, and Students to view. Then select **Apply**.





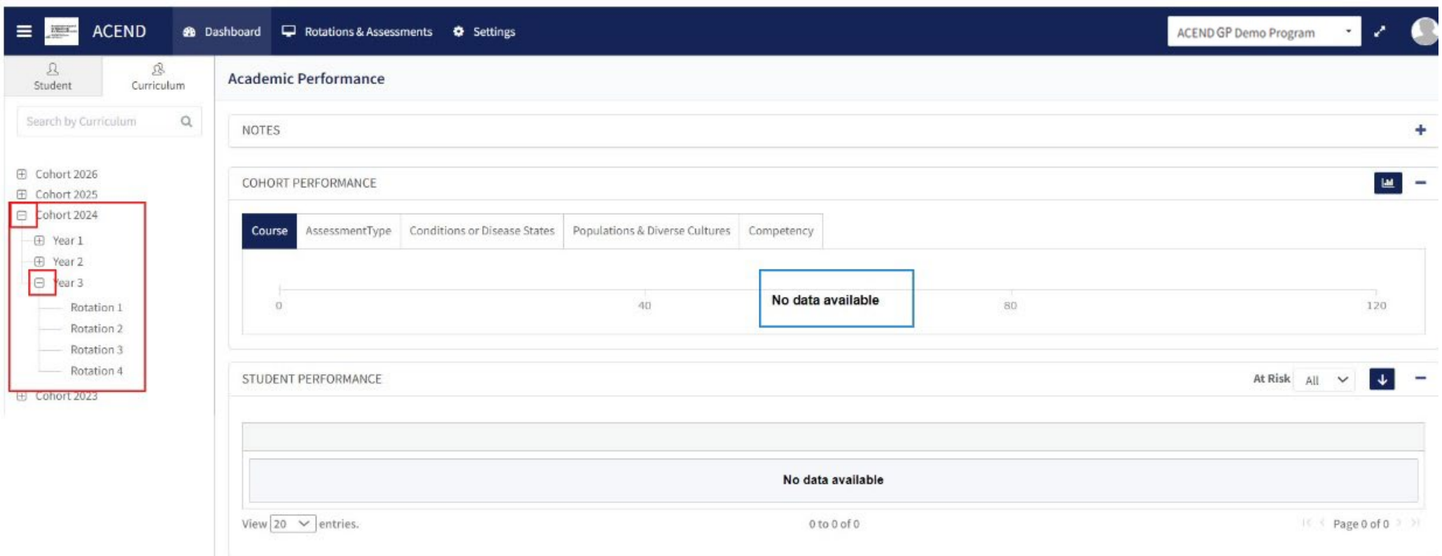
- Approved learner hours are now dispalyed.
- Click the **+** next to each learner name to view hours tracking details.
- Click **Download** for an Excel Hours Tracking Report.

11. Program Director Dashboard Navigation

When assessments have been created, mapped, assigned and completed, the assessment results are available on the Program Director dashboard. When you login to Competency with your Program Director credentials, cohort and individual student results will be available on your dashboard.

IMPORTANT! Mean Cohort Data displays on the student dashboard via the Competency app and website. While this is aggregate data, programs with few students (e.g. cohorts of 2-3) may be able to easily calculate student specific results from the data provided. While this cannot be hidden from the student dashboard, programs with small cohorts may choose not to give student access to Comptency so the mean cohort data cannot be viewed by students.

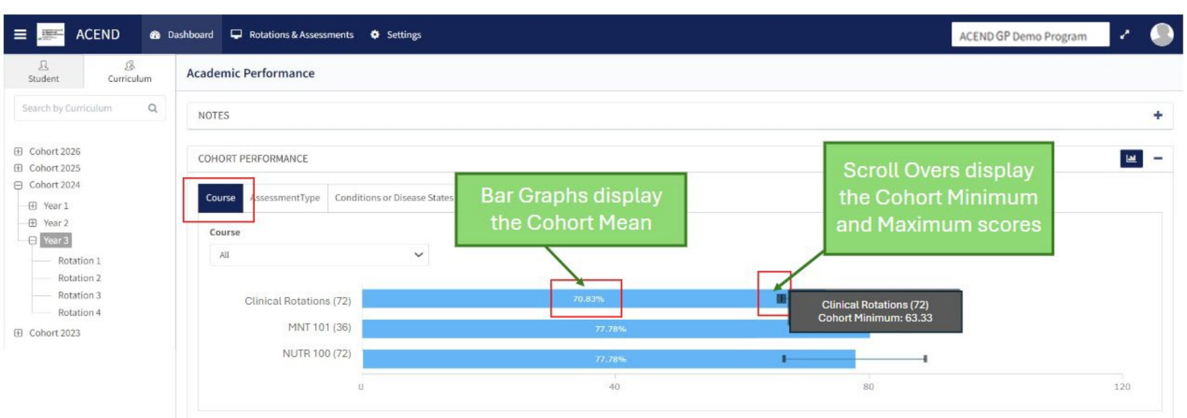
11a. Initial Navigation



- Use the left-hand navigation tree to open the **Cohort, Phase** and **Block** you would like to view.
- Click the **+** to open the items on the navigation tree.
- Select the level you wish to view.

No Data Available* will display until you select a **Cohort, Phase or **Block.**

11b. Course Tab



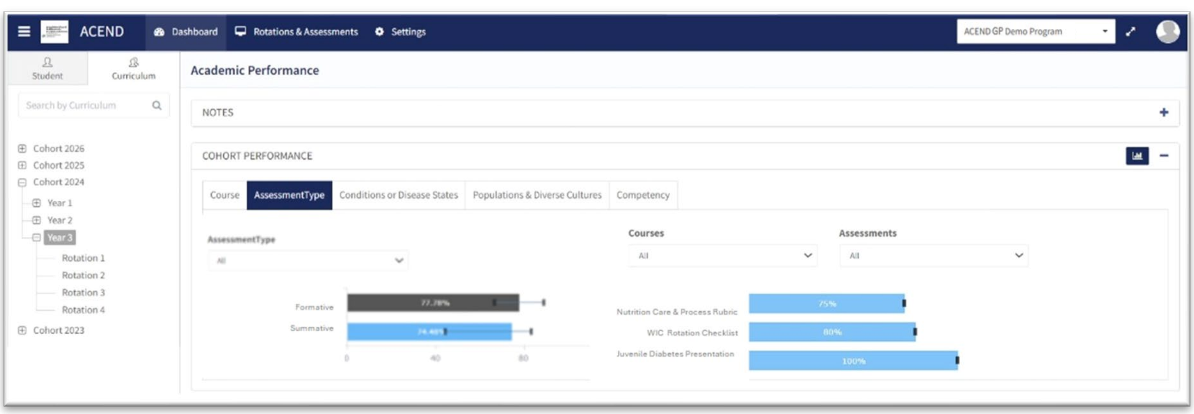
1. Cohort View

The cohort mean for all assessments completed in the course or rotation are displayed on the bar graph. Scroll-overs at the end of the bar provide the cohort minimum and maximum percentage for all assessments completed within the course.

2. Individual Learner Percentages

- The grid below the bar graph displays the calculated percentage grade for individual learners within each course.
- Rubric and checklist assessments are converted to percentages.
- Pink boxes indicate a percentage between 70-75% for the rotation or course.
- Red numbers indicate a percentage of 69% or lower.
- Click the student name to access the learner dashboard view.

11c. Assessment Types Tab

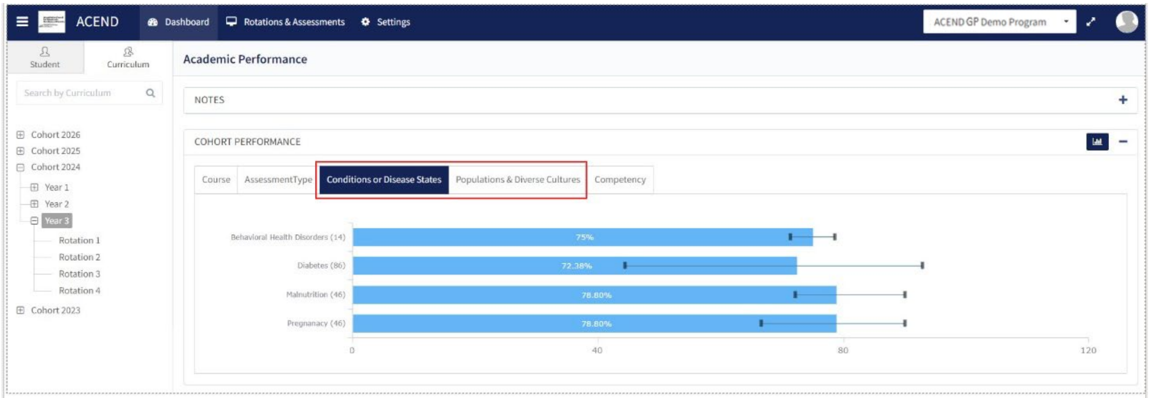


As a Program Director, you have assigned an **Assessment Type** (formative or summative) to each rubric and checklist you have created. The **Assessment Types** tab provides a visualization of both formative and summative assessments together, individually or sorted by assessment type.

Sort by:

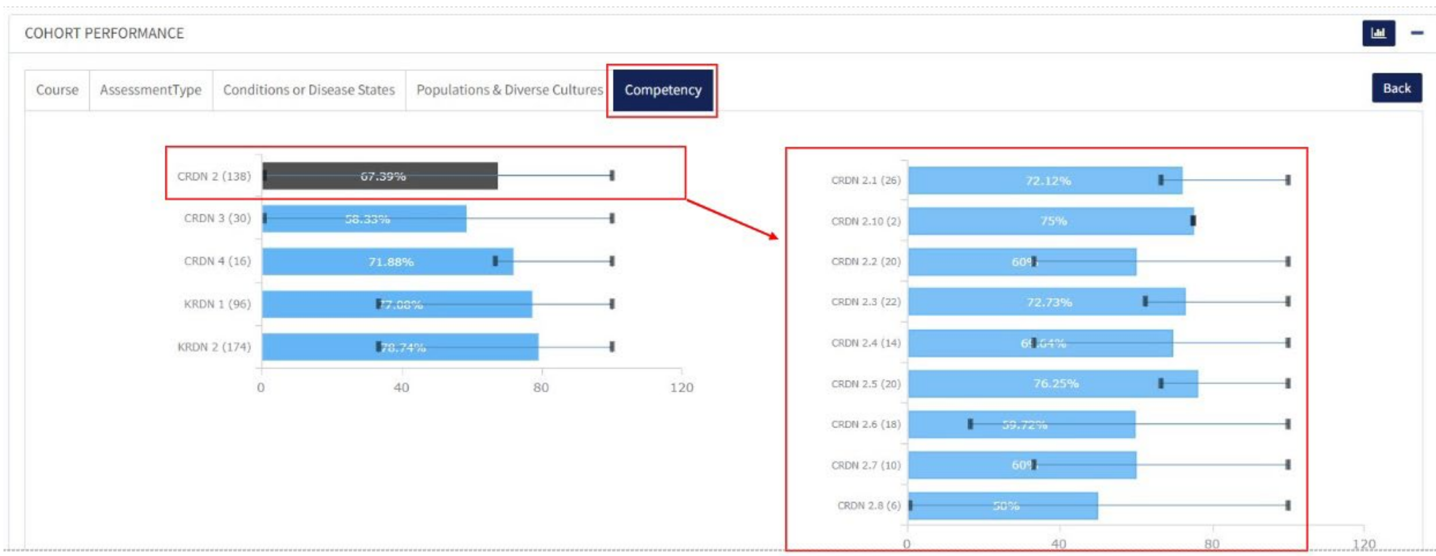
- Assessment Type
- Course
- Individual Assessments

11d. Conditions or Disease States / Populations & Diverse Cultures



If you have mapped questions to **Conditions or Disease States, Populations** and **Diverse Cultures** the assessment percentages are available under the selected tab for viewing.

11e. Competency



- Rubrics, checklists and imported questions mapped to ACEND sub-competencies in **Settings** are displayed under the **Competency** tab.
- Every sub-competency maps to a parent competency.
- Click the competency bar to view the mapped sub-competencies.