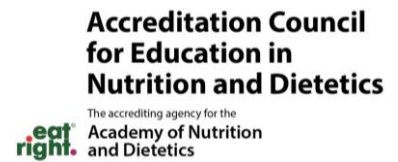


Preceptor

ACEND Competency User Guide

IMPORTANT: the *Competency* software currently does not have a faculty-specific role. Faculty can be added to *Competency* under the Preceptor role. Faculty and preceptors should use this user guide as it is comprehensive for both role types.

April 10, 2024



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Competency Overview

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.

Competency centrally combines and analyzes learning performance data from various assessment systems, manages supervised practice rotation schedules, and obtains 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 and verify and track supervised practice hours. Students and interns can submit supervised practice hours for approval and track their performance on knowledge requirements and competencies throughout the program.

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.

1. Login

1a. Welcome Email

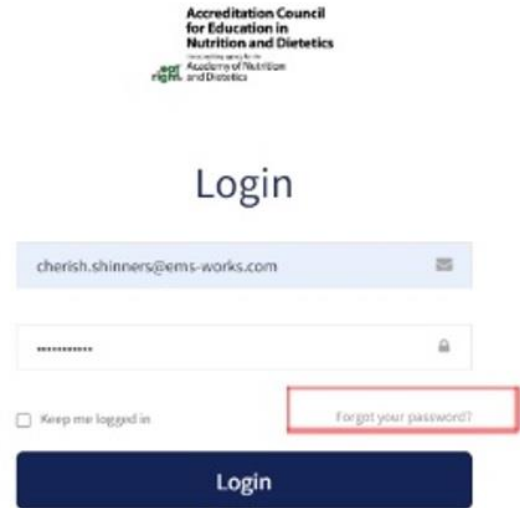
Preceptors and Faculty (assigned in a Preceptor role) accounts are created by an ACEND Program Director. Preceptors and Faculty members will receive an email from Competency with a prompt to create a unique password. **Note:** You may need to check your spam folder to ensure you receive this account information.

If you have not received an email inviting you to create a password, please contact your ACEND Program Director. 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>

1b. Log In to Competency

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



2. Dashboard

The interactive dashboard appears when you log in to Competency. When your program starts collecting data, the information will display on the dashboard. Initially, the dashboard is blank.

The screenshot shows the 'Preceptor' dashboard. At the top, there is a navigation bar with 'ACEND', 'Dashboard' (highlighted with a red box), and 'Rotations & Assessments'. On the right, it says 'ACEND CP Demo Program'. Below the navigation bar, there are tabs for 'Site' and 'Cohorts'. A search bar for learners is present. On the left, there are buttons for 'Cohort 2023' and 'Cohort 2024'. The main area is titled 'Preceptor' and contains a 'ROTATION OVERVIEW' section. This section has tabs for 'Rotation Details', 'Documents', 'Checklist', 'Learners', 'Patient Encounter', and 'Sites'. The 'Rotation Overview' dropdown is set to 'Diabetes Hospital Rotation'. A calendar for March 2024 is displayed, showing rotation slots for '10:00 AM, Diabetes Hospital' on various days.

Program Directors create rotations and courses, then assign students to Preceptors/Faculty within the Preceptor Role. Within this role, Preceptors/Faculty can only see data related to their assigned students. Competency provides a framework for your program to chart student progression through ACEND domains and competencies. These items have been provided by ACEND and created by EMS in Competency.

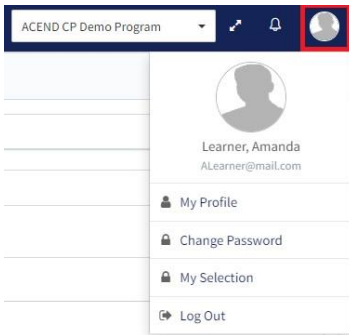
2a. Navigation Tools

Click to show/hide to view the **Site** and **Cohort** tabs. This provides an expanded view of the dashboard screen.

Click to **enter/exit full screen**.

This screenshot is similar to the previous one but shows a different rotation. The 'Rotation Overview' dropdown is set to 'WIC Rotation'. The calendar for March 2024 shows rotation slots for '10:00 AM, Montgomery County WIC' on various days. The 'Dashboard' and 'Rotations & Assessments' tabs in the top navigation bar are also highlighted with red boxes.

2b. User Profile Click the **User Profile** in the upper right of the screen to:

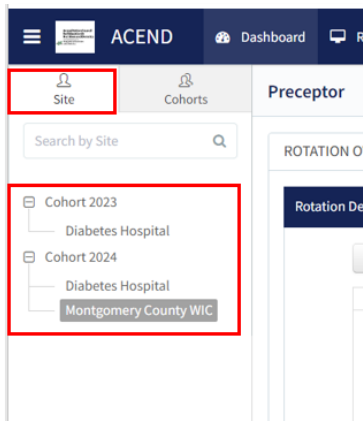


- Update your user profile
- Change your password
- The **My Selection** tab is disabled
- Log Out

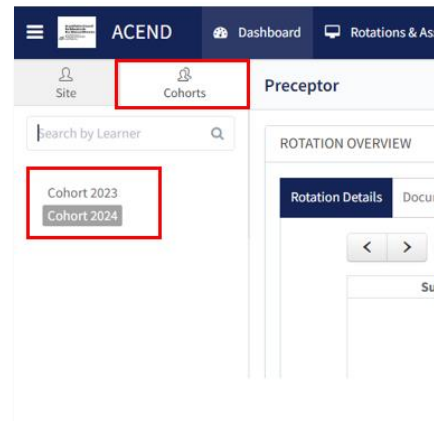
2c. Site/Cohort Tabs

From the left navigation pane, the **Site** and **Cohort** tabs allow users to sort information on the dashboard by **Site** (the location to which rotations, preceptors and learners have been assigned) or by **Cohort** (group of students progressing through the same academic curriculum).

Site Tab



Cohort Tab



2d. Rotation Overview

1. Use the **Rotation Overview** tile to review Rotation Details, Documents, Checklists, Learners, Patient Encounters, and Sites assigned to you. To view a rotation and/course you are assigned to. Click the specific **Rotation Overview** on the right to select the appropriate data to populate within the Dashboard tabs.

Rotation Details Tab

The **Rotation Details** tab provides a calendar view and useful details about the rotations to which preceptors have been assigned. To view, select a **Rotation Overview** from the dropdown menu and click the **Rotation Details** tab. Scroll over the calendar to view site specific notes or location information provided by the Program Director.

Documents Tab

The document storage feature has been disabled and is non-functioning for ACEND programs and documents cannot be uploaded via this tab. This includes the **Preceptor Availability** tile noted within the tab as well.

Preceptor

ROTATION OVERVIEW

Rotation Details Documents Checklist Learners Patient Encounter Sites

Rotation Overview Clinical Rotation

*Click on icon to view details and download document

View 10 entries.

Page 0 of 0

The Documents Tab and Preceptor Availability tile are non-functioning and will be removed.

PRECEPTOR AVAILABILITY

Rotation Availability

Mark your availability for Rotation Blocks by selecting Sites, Rotation Overview and no. of seats available.

Mark yourself as unavailable

Save Save and Submit

Rotation Block	Select Site	Select Rotation Overview	No. of Seats
----------------	-------------	--------------------------	--------------

Checklist Tab

The Checklist functionality has been moved to the Rotations and Assessment Tab (Assessments Tab for DPD programs). Please see section, 3b. Complete Checklist Assessments in the Competency Website, within this guide for more information on completing a checklist.

ACEND Dashboard Rotations & Assessments

ACEND CP Demo Program

Site Cohorts

Search by Learner

Cohort 2023 Cohort 2024

Preceptor

ROTATION OVERVIEW

Rotation Details Document Checklist Learners Patient Encounter Sites

Clerkship Diabetes Hospital Rotation

Submitted/Total Required

View 10 entries.

Page 0 of 0

Checklist functionality has been moved to the Rotations and Assessment Tab. The Check list Tab will be disabled at a future date. The Rotations and Assessments tab is reviewed later in this document.

Learners Tab

Use the **Learners** tab to view data for all learners assigned to a Preceptor/Faculty within a rotation or course.

The screenshot shows the 'Preceptor' interface with the 'ROTATION OVERVIEW' section. The 'Learners' tab is active, and a dropdown menu is open, showing 'Rotation Overview' and 'WIC Rotation'. A table lists learners with columns for Name, Email, Contact, Site, Mid-Term Fe..., and Final-Term Fe....

Learner Name	Learner Email	Learner Contact	Site	Mid-Term Fe...	Final-Term ...
Learner, Amanda AL001	ALearner@mail.com	215-555-1212	Montgomery County WIC	Yes	Yes
Student, Beth BStu001	BStudent@mail.com	215-362-0905	Montgomery County WIC	Yes	Yes

To view a specific learner:

1. Select a **Rotation Overview** from the dropdown menu.
2. Click the **Learners** tab to open a list of learners within this **Rotation Overview**.
3. View learner contact information (if provided by the Program Director). Click the learner name for relevant evaluation information and to view Learner specific data. Click **Back to List** to return to Cohort data.
4. Review the **Rotation Schedule** for the selected learner.
5. Review **Patient Encounter Notes** completed by the selected learner.
6. Review **Clerkship Progress** towards item level targets created by Program Directors. **Note: Clerkship Progress** displays the Patient Encounter Note questions created by the Program Director. The target value represents the total Patient Encounter Notes the student is expected to complete.
7. View **Sign-off** items as submitted by Learner.

The screenshot shows the 'Learner, Amanda' page with the 'Rotations' tab selected. A calendar view for March 2024 shows rotation schedules with blue blocks indicating rotation periods.

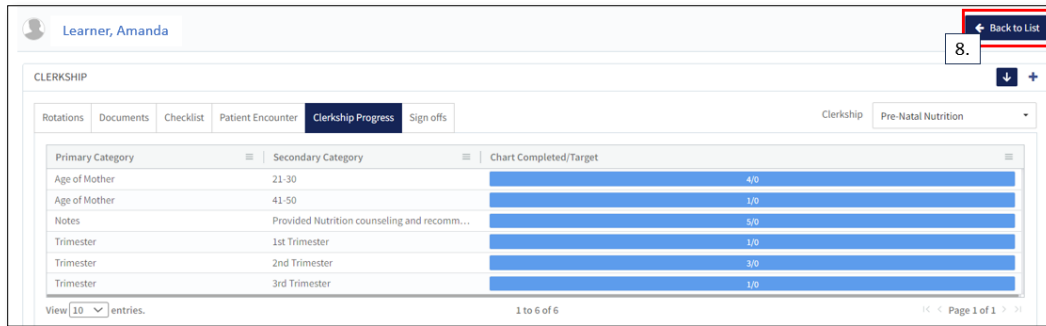
The screenshot shows the 'Learner, Amanda' page with the 'Patient Encounter' tab selected. A table lists patient encounters with columns for Patient Initials, Site, Location, Encounter Date, and Submission Due Date.

Patient Initials	Site	Location	Encounter Date	Submission Due Date
MGS	Brentwood OB/GYN PLLC	Nashville, TN	02/11/2024	--
AMS	Brentwood OB/GYN PLLC	Nashville, TN	02/11/2024	--
KAH	Brentwood OB/GYN PLLC	Nashville, TN	02/11/2024	--
KAC	Brentwood OB/GYN PLLC	Nashville, TN	02/11/2024	--
MCJ	Brentwood OB/GYN PLLC	Nashville, TN	03/21/2024	--

The screenshot shows the 'Learner, Amanda' page with the 'Clerkship Progress' tab selected. A table displays clerkship progress with columns for Primary Category, Secondary Category, and Chart Completed/Target.

Primary Category	Secondary Category	Chart Completed/Target
Age of Mother	21-30	4/0
Age of Mother	41-50	0/0
Notes	Provided Nutrition counseling and recomm...	0/0
Trimester	1st Trimester	0/0
Trimester	2nd Trimester	0/0
Trimester	3rd Trimester	0/0

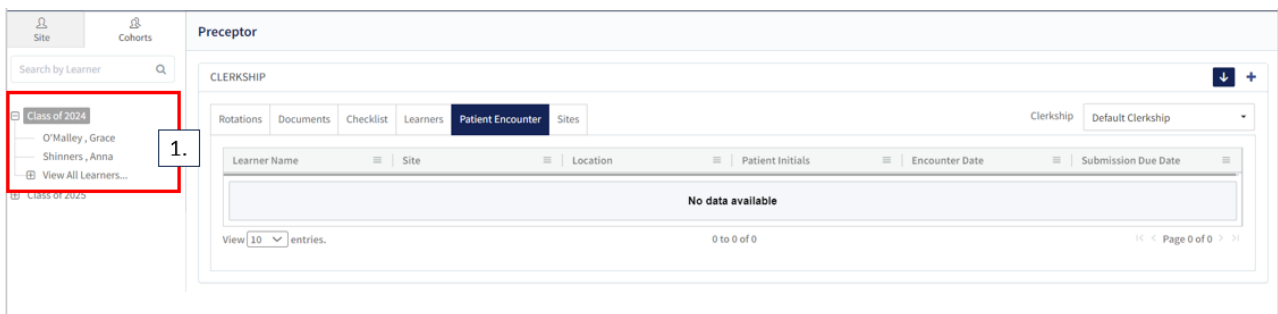
- Click **Back to List** to quit viewing the current Learner and return to the Learner list to view another Learner.



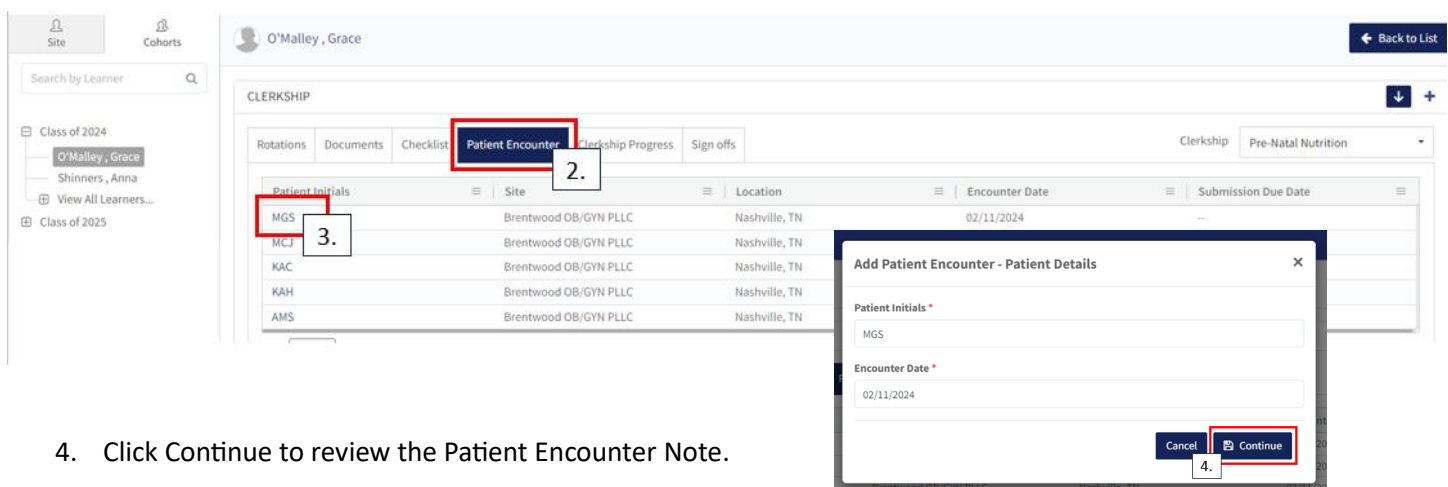
Patient Encounter Tab

Use the **Patient Encounter** tab to view Patient Encounter Notes submitted by Learners within the selected Rotation Overview. **Note:** Patient Encounter notes can also be reviewed under the **Learner** tab. See above.

- To view a specific Learner’s Patient Encounter Note, use the Learner dropdown in the left side pane to select Learners within the **Cohort** tab.

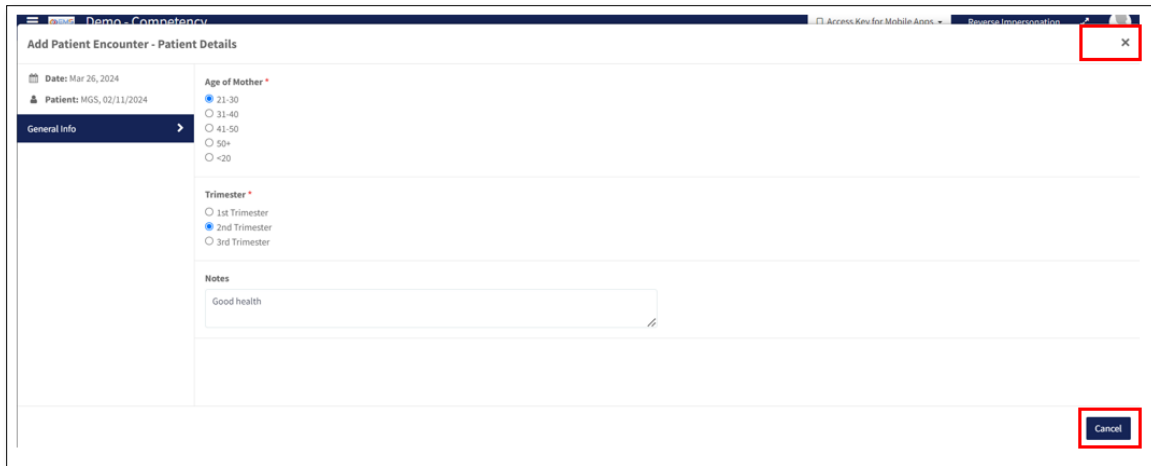


- You are now viewing information for the selected Learner.
- Select the Patient Encounter Note you wish to review by clicking the patient initials.



- Click Continue to review the Patient Encounter Note.

5. The completed Patient Encounter Note is now open for review. Click **x** or **cancel** to return to the dashboard.

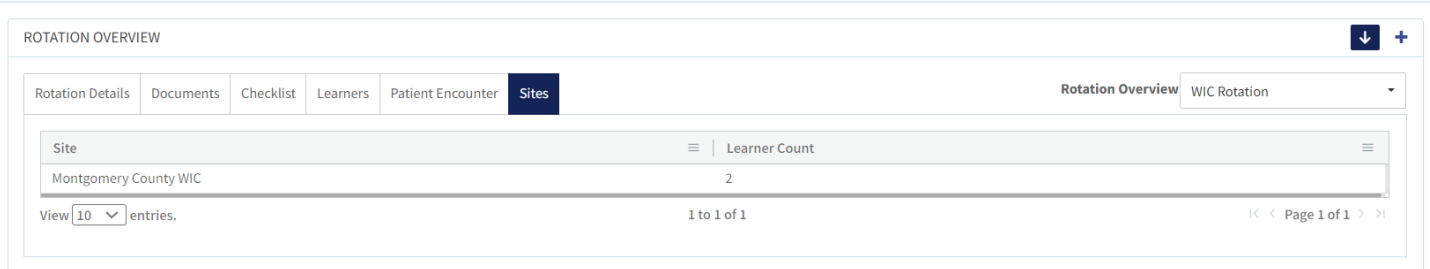


6. Click **Back to List** to return to the dashboard.

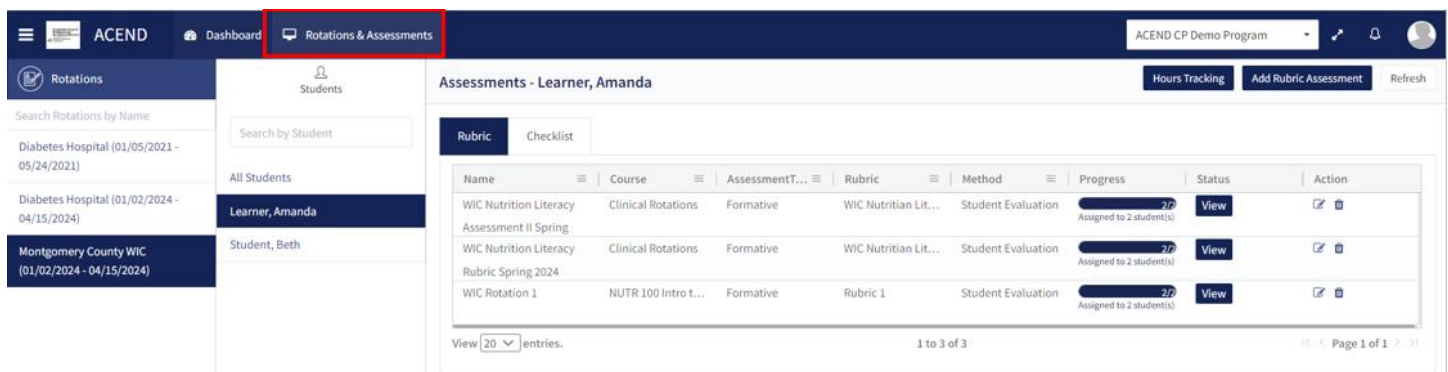
Sites Tab

The **Sites** tab provides the location name and Learner count for the selected rotation.

Preceptor



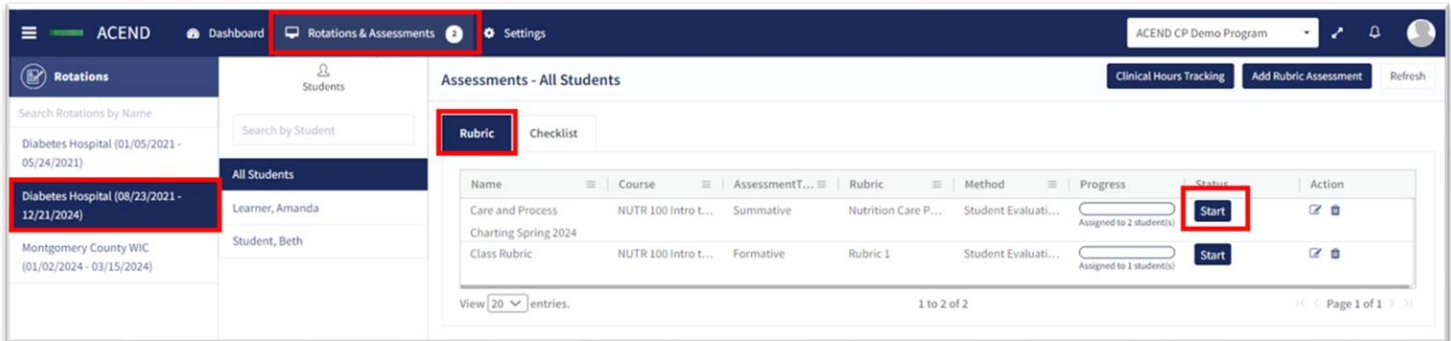
3. Rotations & Assessments



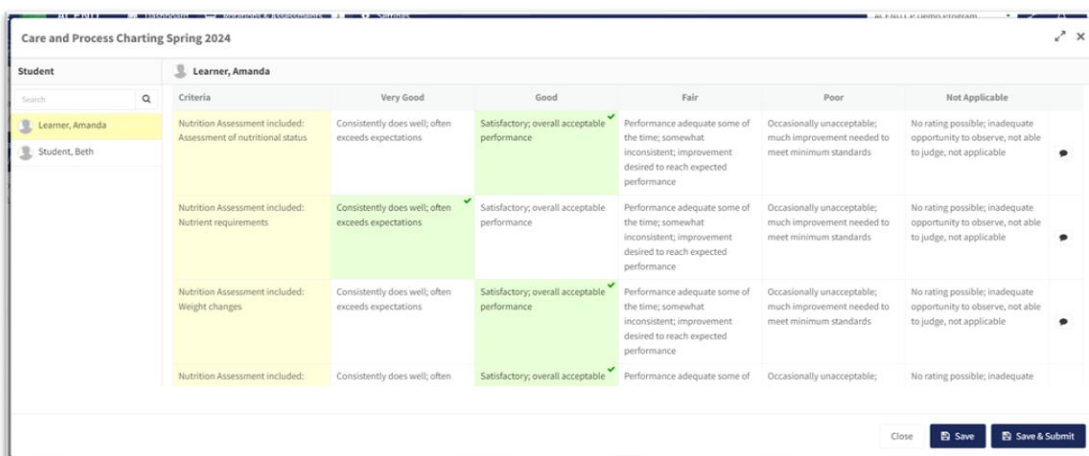
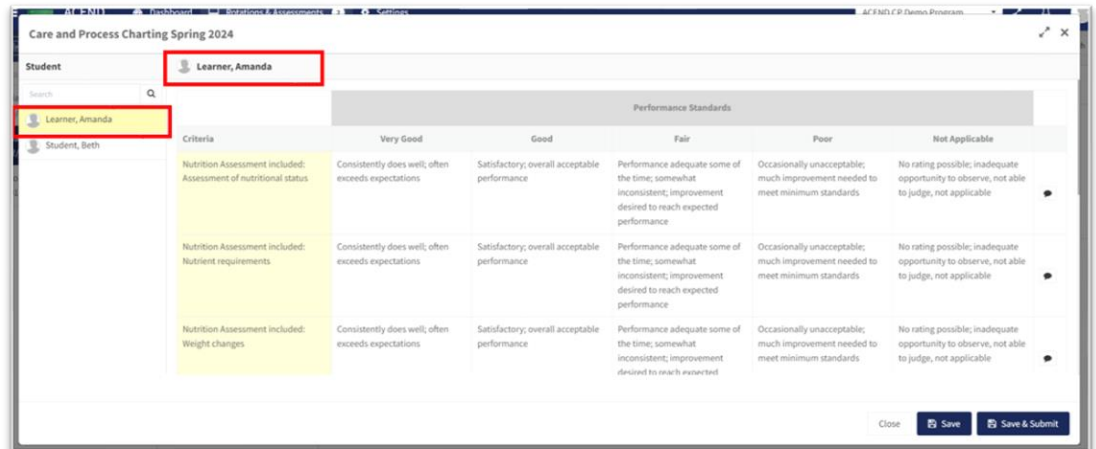
The **Rotations & Assessments** tab (will display as **Assessment** Tab for DPD programs) allows Preceptors/Faculty to complete rubric and checklist evaluations. Programs with rotations may also approve hours for assigned learners from this tab. If you do not see the expected rotations or learners, please contact your Program Director for additional help.

3a. 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** (if a DPD program, click **Assessments**) > **Select a Rotation** > **Rubric** > **Start**.

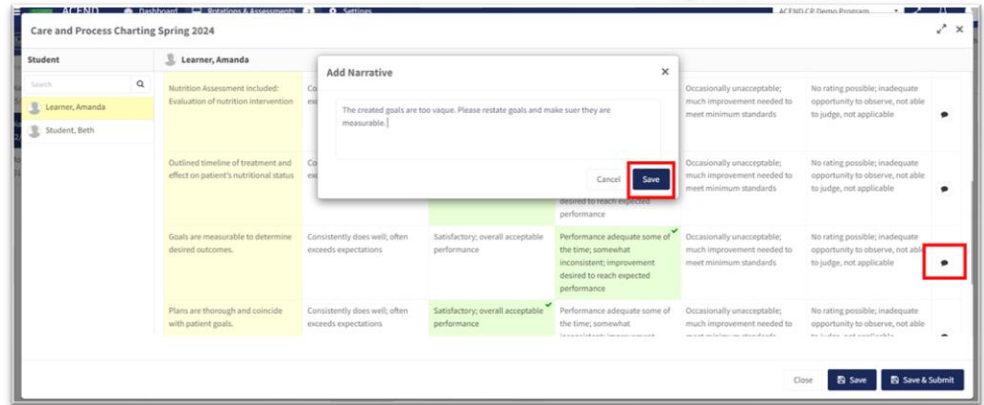


- The rubric assessment is now open in a pop-up window.
- The student being evaluated is highlighted in yellow.
- The student name is also displayed at the top of the rubric pop up screen.

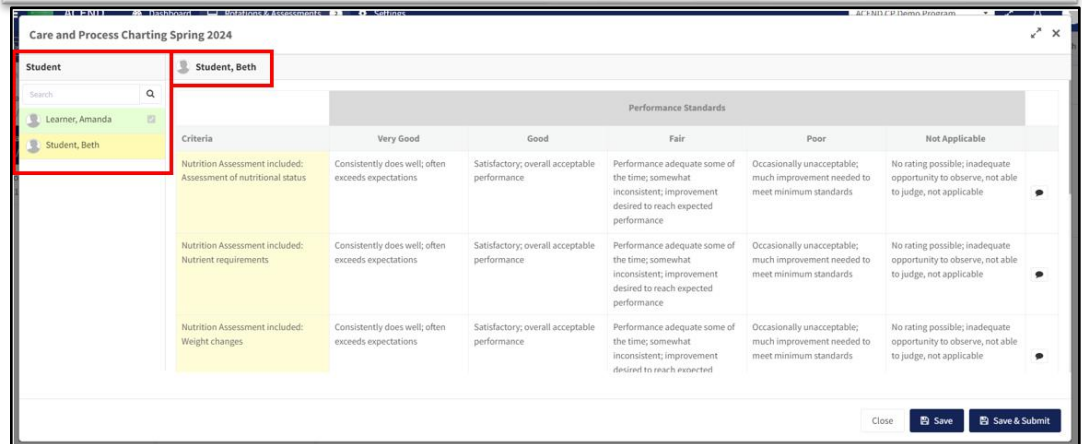
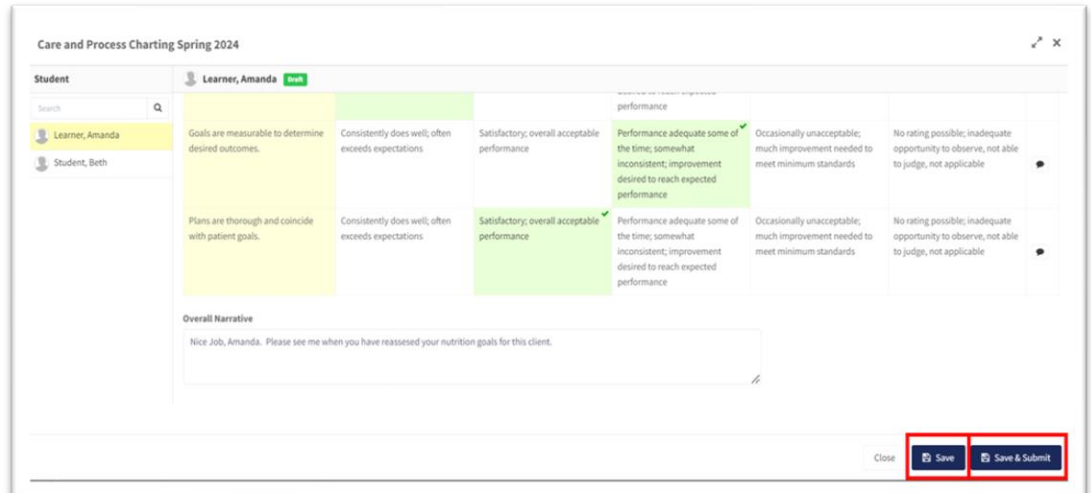


- Evaluate the student.
- Click a performance standard for each criteria on the rubric assessment.
- Performance standards highlight in green as they are selected.

- 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.

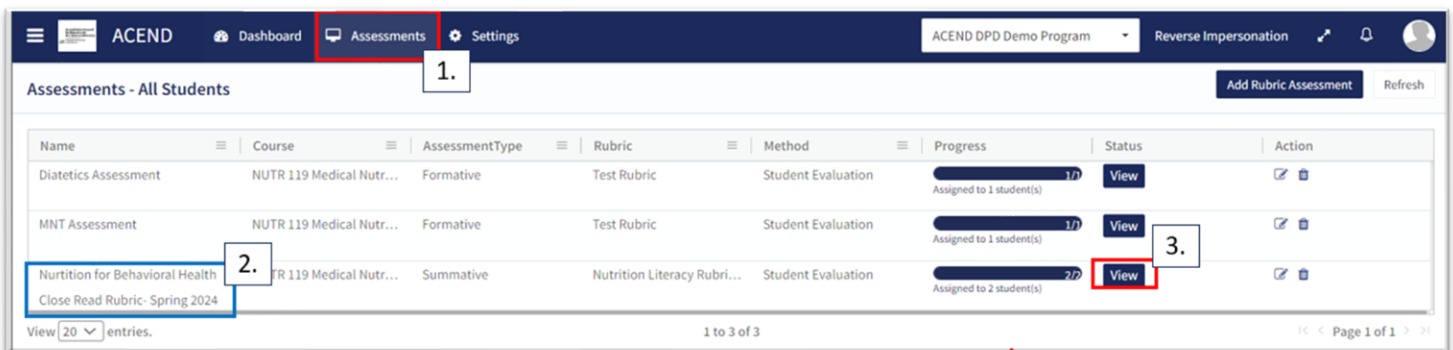
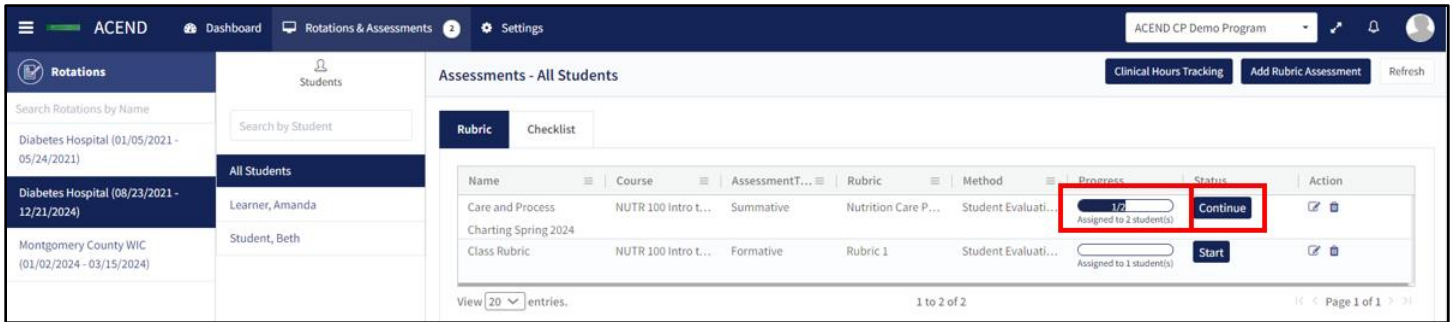


- Click the **SAVE** button to save the rubric evaluation.
- **SAVE** allows the evaluator to return to the evaluation for edits and make updates at a later time.
- **Save & Submit** is a final submission. The **Save & Submit** button DOES NOT allow for reassessment or edits to the rubric evaluation.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

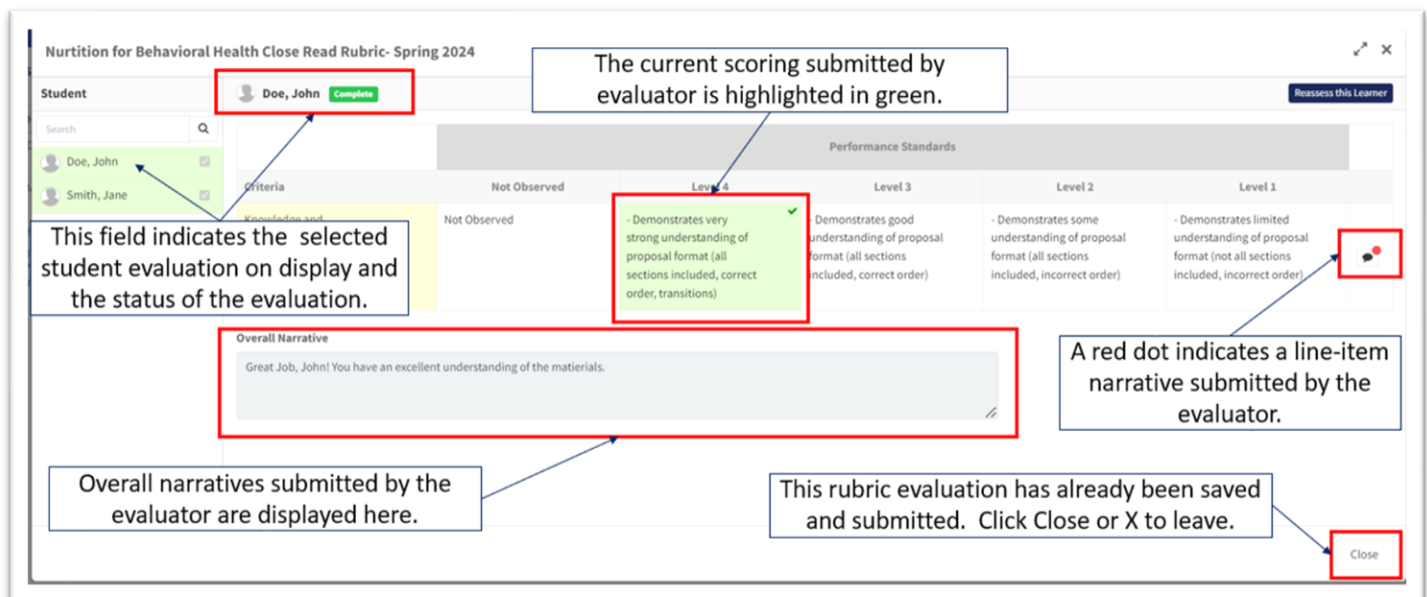


- Completed student evaluations are now highlighted in green.
- The evaluator is now able to evaluate another student on the list of students assigned to this rubric evaluation.

The **Rotations & Assessments** tab/**Assessments** tab (for DPD programs) now shows the rubric assessment in progress for students in this rotation and/or course. Click **Continue** to continue the rubric evaluations for the rotation and/or course.



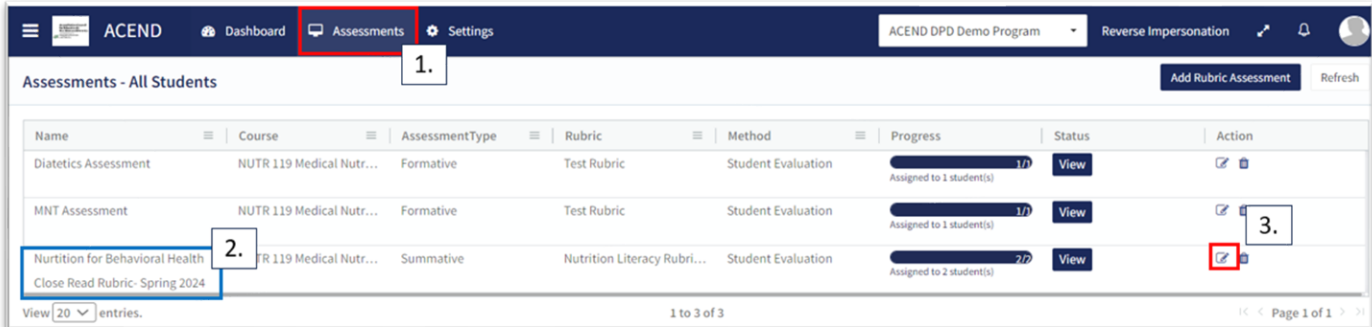
To review completed Rubrics, click **Rotations & Assessments** (if a DPD program, click **Assessments**) > Find the Rubric > **View**. This will allow you to view the completed rubric assessment.



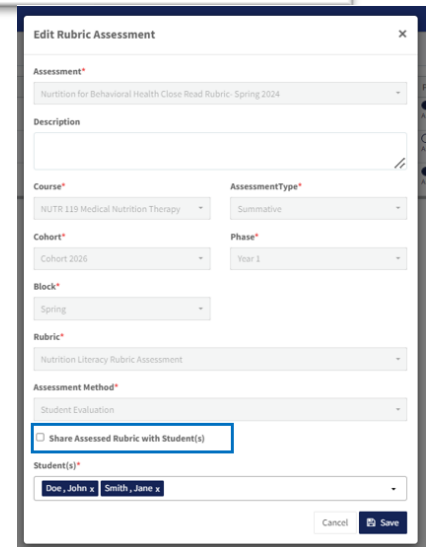
3b. Reassess a Learner

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

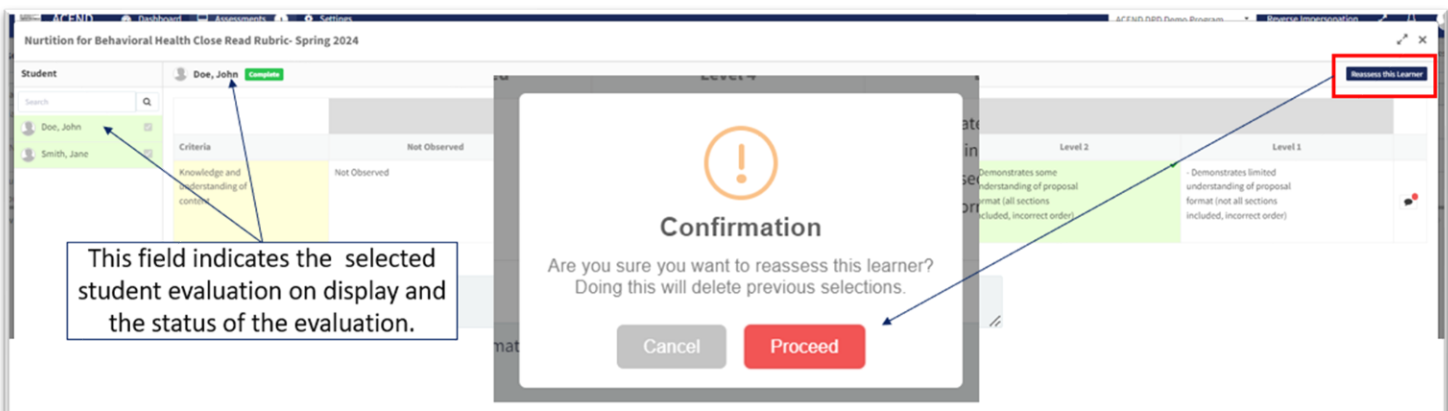
To reassess a learner, click **Assessments** (or **Rotations & Assessments**) > Find the rubric you would like to reassess> click the **Edit icon**



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.* This can be re-shared 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. If the Rubric assessment is NOT shared with students, the **Reassess This Learner** button appears in the upper right corner.



- 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.



Once a preceptor or faculty member has completed an evaluation and made it viewable to learners, it can be accessed in a view only format. To view a Rubric, click **Rotations & Assessments (Assessments if a DPD program) > Select a Rotation > Rubric > View.**

- The rubric assessment appears in a pop-up window.
- The student name appears at the top of the rubric pop up screen.
- The selected Performance Standard for each criteria on the **Rubric Assessment** are highlighted in green.
- Click the comment bubble to review the criteria-level line item narratives.

Disordered Eating Nutrition Care Process and Charting Fall 2023

Student: Learner, Amanda Complete

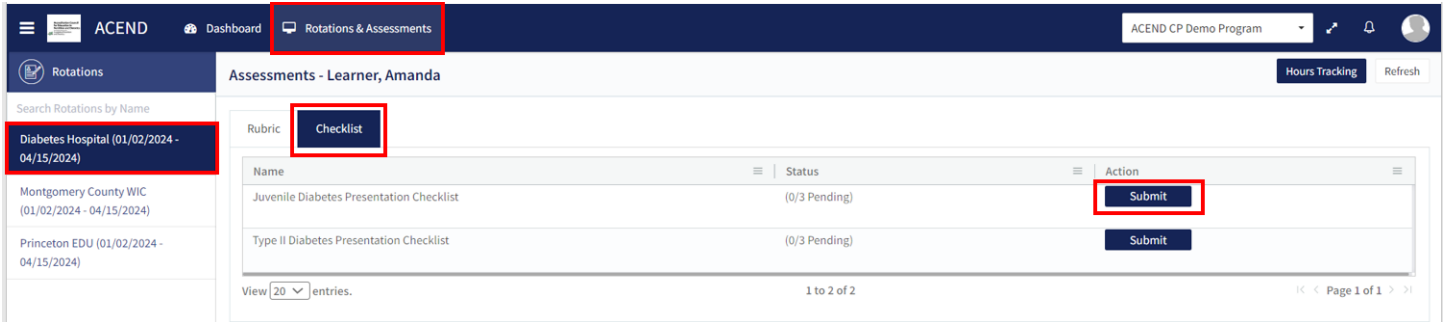
Criteria	Performance Standards					
	Very Good	Good	Fair	Poor	Not Applicable	
Nutrition Assessment included: Assessment of nutritional status	Consistently does well; often exceeds expectations	Satisfactory; overall acceptable performance ✓	Performance adequate some of the time; somewhat inconsistent; improvement desired to reach expected performance	Occasionally unacceptable; much improvement needed to meet minimum standards	No rating possible; inadequate opportunity to observe, not able to judge, not applicable	🗨
Nutrition Assessment included: Nutrient requirements	Consistently does well; often exceeds expectations ✓	Satisfactory; overall acceptable performance	Performance adequate some of the time; somewhat inconsistent; improvement desired to reach expected performance	Occasionally unacceptable; much improvement needed to meet minimum standards	No rating possible; inadequate opportunity to observe, not able to judge, not applicable	🗨
Nutrition Assessment included: Weight changes	Consistently does well; often exceeds expectations	Satisfactory; overall acceptable performance ✓	Performance adequate some of the time; somewhat inconsistent; improvement desired to reach expected performance	Occasionally unacceptable; much improvement needed to meet minimum standards	No rating possible; inadequate opportunity to observe, not able to judge, not applicable	🗨
Nutrition Assessment included: Evaluation of nutrition intervention	Consistently does well; often exceeds expectations	Satisfactory; overall acceptable performance	Performance adequate some of the time; somewhat inconsistent; improvement desired to reach expected performance ✓	Occasionally unacceptable; much improvement needed to meet minimum standards	No rating possible; inadequate opportunity to observe, not able to judge, not applicable	🗨
Outlined timeline of treatment and effect on patient's nutritional status	Consistently does well; often exceeds expectations	Satisfactory; overall acceptable performance ✓	Performance adequate some of the time; somewhat inconsistent; improvement desired to reach expected performance	Occasionally unacceptable; much improvement needed to meet minimum standards	No rating possible; inadequate opportunity to observe, not able to judge, not applicable	🗨
Goals are measurable to determine desired outcomes.	Consistently does well; often exceeds expectations	Satisfactory; overall acceptable performance ✓	Performance adequate some of the time; somewhat inconsistent; improvement desired to reach expected performance	Occasionally unacceptable; much improvement needed to meet minimum standards	No rating possible; inadequate opportunity to observe, not able to judge, not applicable	🗨

3c. Complete Checklist Assessments in the Competency Website (All Program Types Except DPDs)

Checklist assessments are assigned by the Program Director and can be completed on the Competency Website or in the Competency App*.

*Please see 3d. to complete checklist assessments in the Competency app.

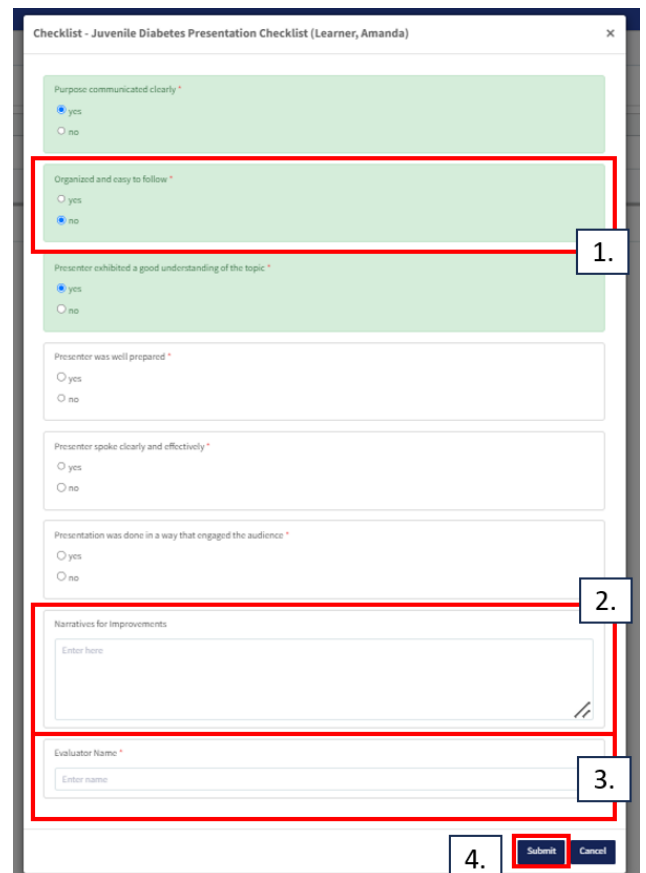
Click **Rotations & Assessments > Select a Rotation > Checklist > Submit**



Complete the Checklist

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.

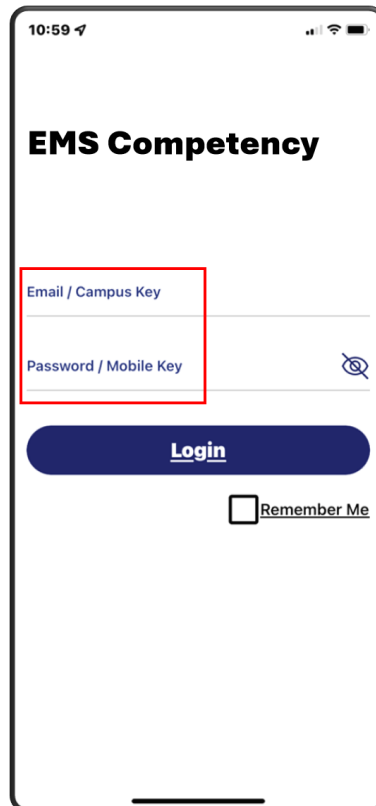
Note: Checklists DO NOT offer a Save & Submit option. **All checklists submissions are final.** If an error was made on the checklist, evaluators may return to the **Rotation & Assessments** tab to complete another checklist. Add a narrative to the checklist indicating the need for re-evaluation.



3d. Complete Checklist Assessments on a Mobile Device in the Competency App (All Program Types Except DPDs)

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.*



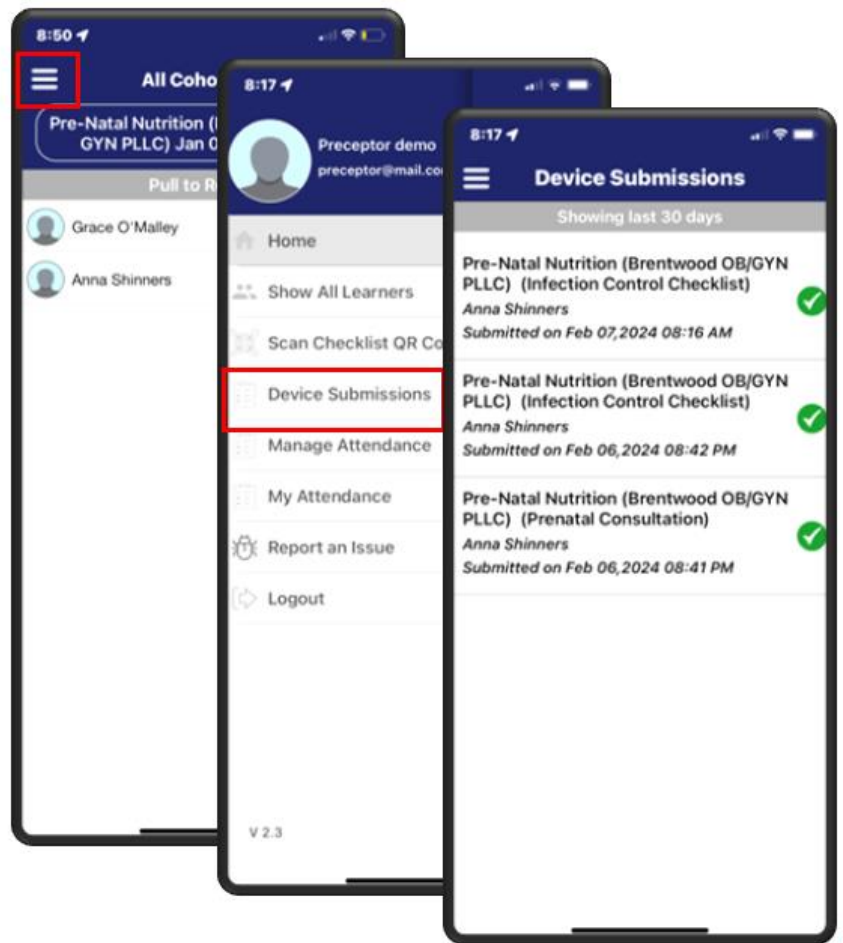
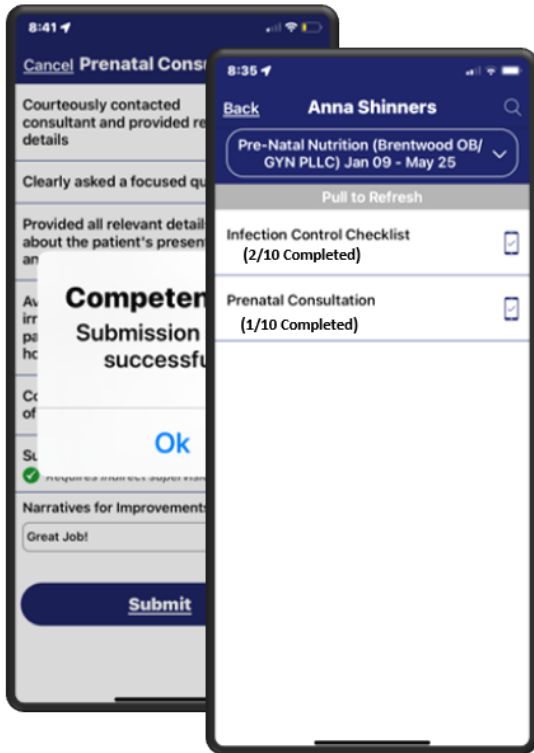
To complete a checklist, select the rotation you are assigned to. Then select the student you are precepting. An evaluation list will population. Select the evaluation you need to complete. Ensure you answer every required question. Then click **Submit**.



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

The checklist completed submission count is also updated for the student on their dashboard.

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.



4. 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.

4a. 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 receives an email notification when hours have been **Approved** or **Rejected**.

Date	Student Name	Hours:Minutes	Comments	Status	Action
01/19/2024	Amanda Learner	3:15	Click to enter comments	Pending for approval	Approve Reject
01/19/2024	Amanda Learner	5:00	Click to enter comments	Pending for approval	Approve Reject