



Accreditation Council for Education in Nutrition and Dietetics The accrediting agency for the Accademy of Nutrition and Dietetics

Program Director

ACEND Competency User Guide

March 1, 2024





Accreditation Council for Education in Nutrition and Dietetics

Academy of Nutrition and Dietetics

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Competency Program Director User Guide

Welcome to Competency, a software product created by Education Management Solutions (EMS), LLC. 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, and competencies 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 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.

Ompetency	
ACEND	Accreditation Council for Uducation in Nutrition and Distetics accessible and Destination and Destination
	Login
Accreditation Council	cherish.shinners@ems-works.com
for Education in Nutrition and Dietetics	A
the accrediting agency for the	Corget your password)
right. Academy of Nutrition and Dietetics	Login

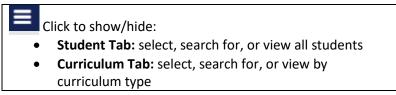
1b. Program Director Dashboard

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.

🚍 📰 ACEND 🝙 🛤	ashboard 🖵 Rotations & Assessments 🔹 Settings	ACEND CP Demo Program 🔷 🖌 🕓
요 요 Student Curriculum	Academic Performance	
Search by Curriculum Q	NOTES	+
 	COHORT PERFORMANCE	—
 Cohort 2024 Cohort 2023 	Course AssessmentType Conditions or Disease States Populations & Diverse Cultures Competency	
	Course	
	Chabeter Monobal Bastation (100) 72 556	

Dashboard Navigation Tips



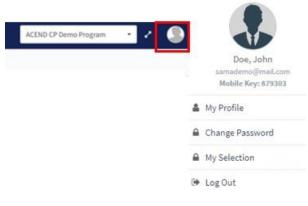




Academy of Nutrition and Dietetics

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:

A B Student Curriculum Search by Curriculum	L R Student Curriculum
⊕ Cohort 2026 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:	⊕ Cohort 2026 From the left navigation pane, click the Curriculum tab and then select the Cohort, Year, and Term to search for and view student data:
L B Student Curriculum	L B Student Curriculum Search by Curriculum Q Cohort 2026 P Year 1
 Cohort 2026 Brown , Abigail Year 1 Fall 2023 Spring 2024 	Fall 2023 Spring 2024 Year 2 Cohort 2025 Cohort 2024 Cohort 2024 Cohort 2023





1c. Rotations & Assessments Tab (All Program Types Except DPDs)

The **Rotations & Assessments** tab enables Program Directors to assign, score, and review rubric assessments and hours tracking. See **Rotations** on page 20 for additional information about this section.

acend 🐽	Dashboard	🖵 Rotations & Assessments	Setting	s									ACE	ND CP Demo Pr	rogram 🔹 🖌 🕻	۵ 🌘
(Rotations		<u>ि</u> Students	Assessmer	nts - All Stu	uden	its							Но	urs Tracking	Add Rubric Assessment	Refresh
Search Rotations by Name	-															
Diabetes Hospital (01/02/2024 -	Searc	h by Student	Rubric	Checklist	1											
03/15/2024)	All Stud	lents	Name		=	Course	1	AssessmentT≡	Rubric	=	Method	=	Progress	Status	Action	
Montgomery County WIC (01/02/2024 - 03/15/2024)	Learner	, Amanda		Diabetes		Clinical Rota	tions	Summative	Geriatric	Diabet	Student Ev	aluati	Assigned to 2 studer	2D View	07 B	
Princeton EDU (01/02/2024 - 03/15/2024)	Student	t, Beth	and the second s	entries.	55					1 to 1	of 1				IC C Page 1 of	1 2 20

1d. Settings

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**.

	END	Dashboard	Rotations & Ass	essments	Settings				
Settings									
Organization ar	nd Users	Curriculum	Competencies	Assessme	nts Rota	ations	Reports	ALL	

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.

≡ ACEND	Dashboard	Rotations & Assessments	Settings	ACEND CP Demo Program 🗾 🛃 🔔
Settings				Search
Organization and Users	Curriculum	Competencies Assess	nents Rotation	Reports ALL





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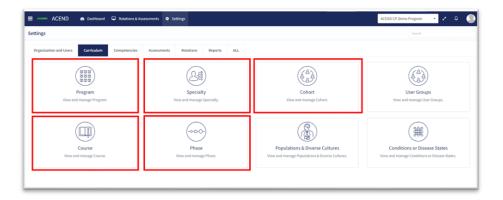
program schedules; however, the mandatory fields that MUST be completed to successfully map items in Competency are Program, Specialty, Cohort, Course, Phase, and Block (falls under the Phase).

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.

Review and Edit Program Details



≡ ACEND & □	ashboard 📮 Rotations & Assessments	Settings			ACEND CP Demo Program 🔹 🕗 🚇
Organization and Users	Program				🗲 Back 📥 Download
Curriculum	Name	≡ Туре	Program Director Name	≡ Program Director Email	■ Program Details
Program	ACEND CP Demo Program	Coordinated Program (CP)	ACEND, EMS Director	cherish.shinners@ems-works.com	View
Cohort	View 10 🗸 entries.		1 to 1 of 1		<pre>Section 2 ≥ 3</pre>

Some items may not be updated or changed by a program director. If the Program Name, Program Type, or Program Director information is *incorrect*, 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.

Complete the remaining program information fields and Save your program information.

≡ ACEND @ □	Dashboard 🖵 Rotations & Assessments 🗢 Settings		ACEND CP Demo Program 💦 👻	۵
Organization and Users	Program - ACEND CP Demo Program			🗲 Back
🛞 Curriculum	Basic Details			
Program	Program ID	Program name *	Program Type	
Cohort	ACENDI	ACEND CP Demo Program	Coordinated Program (CP)	*
User Groups	Program Director	Email	Create Specialty	
Course	ACEND, EMS Director	cherish.shinners@ems-works.com	Create Specialty	
Phase	Address	Country	Name* Hospital Food Service	
Populations & Diverse	123 Main St.	United States	Title	
Cultures	1		Hospital Food Service	
Conditions or Disease States	City	Zip	Description	
Class	Anytown	12345		
College			Course	Save
			Select Course	
			Cancel Save	

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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

≡ — ACEND ⊛ t	Dashboard 📮 Rotations & Assessments	Settings				ACEND CP Demo Program	- Z	۵
Organization and Users	Course					🗲 Back	🛓 Download	 Create
Curriculum	Name		≡ Title	=	Program		= Delete	
Program	NUTR 100 Intro to Nutrition Rese		Intro to Nutrition Research		ACEND CP Demo Progra			
Cohort	View 10 🗸 entries.			1 to 1 of 1				
User Groups								
Course								
	1							

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	Settings
Name	Displays on the dashboard and all course	Create Course 🗈 🛛 🗙
	dropdown menus. This is the only field	Name*
	required to create a course.	NUTR 120 Food Preparation
Title	Displays on a scroll over text menu when on	Title
	the dashboard.	Food Preparation
Source	Optional advanced feature. Use the field to	Source Course ID
Course ID	identify a course number from an outside	Source course to
	LMS such as Canvas or D2L.	
Custom	Optional feature. Label courses as selective	Custom Label
Label	or track. For example, an elective course	
	may be labeled as selective and a	Description
	professional course may be labeled as track.	Scientific principles of basic food preparation, with an emphasis on the physical and chemical aspects.
Description	Only available for viewing to the Program	Start Date
	Director from the Course tab on the	Select start date
	Curriculum page.	
Start	Advanced feature to be used ONLY when	End Date
Date/End	retiring or creating a new version of a	Select end date
Date	course. DO NOT add start/end dates when	Cancel Save
	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 .	

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2d. Cohort

Click Settings > Curriculum > Cohort > Create.

≡ — ACEND @ □	Dashboard 📮 Rotations & Assessments	• Settings	ACEND CP Do	emo Program 🔹 🖌 🗛 🌔
Organization and Users	Cohort			← Back 📥 Download 🗢 Create
Curriculum	Name	≡ Title	■ Description	≡ Delete
Program	Cohort 2025	Cohort 2025	Those students expected to complete coursewo	ork in June 2025 📋
	Cohort 2024	Cohort 2024	Those students expected to complete coursewo	ork in June 2024 📋
Cohort	Cohort 2023	Cohort 2023	Those students expected to complete coursewo	ork in June 2023 📋
User Groups	View 10 🗸 entries.		1 to 3 of 3	<pre>Pagelofl ></pre>
Course				

Create Cohort Details

	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.				

Name*	
Cohort 2026	
Title	
Cohort 2026	
Description	
Those students expected to complete coursework in June 2026	1
	Cancel Save

2e. Phase

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

- ACEND	Dashboard 🖵 Rotations	& Assessments O Settings				ACEND CP Demo Program	· • •
Organization and Users	Phase					🔶 Back	▲ Download O Cre
Curriculum	Name 1	= Title	Description	= Cohort	Start Date	End Date	= Delete
Program	Year 1	Year 1	Year 1 of 3 year Dietetics	Cohort 2023	08/19/2020	05/24/2021	0
Cohort	Year 1	Year 1	Year 1 of 3 year Dietetics	Cohort 2024	08/23/2021	05/22/2022	0
Contract	Year 1	Year 1	Year 1 of 3 year Dietetics	Cohort 2025	08/20/2022	05/25/2023	•
User Groups	Year 1	Year 1	Year 1 of 3 year Dietetics	Cohort 2026	08/21/2023	05/26/2024	0
Course	Year 2	Year 2	Year 2 of 3 year Dietetics	Cohort 2023	08/23/2021	05/23/2022	0
	Year 2	Year 2	Year 2 of 3 year Dietetics	Cohort 2024	08/21/2022	05/21/2023	0
Phase	Year 2	Year 2	Year 2 of 3 year Dietetics	Cohort 2025	08/27/2023	05/23/2024	8
Populations & Diverse	④ Year 2	Year 2	Year 2 of 3 year Dietetics	Cohort 2026	08/24/2024	05/24/2025	0
Cultures	Year 3	Year 3	Year 3 of 3 year Dietetics	Cohort 2023	08/21/2022	05/28/2023	0
Conditions or Disease	E Year 3	Year 3	Year 3 of 3 year Dietetics	Cohort 2024	08/27/2023	05/26/2024	0
States	View 20 Ventries.			1 to 10 of 10			IC C Page 1 of 1

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	Mandatory field. Add a Start Date and End Date for this
Date	phase. This is usually one academic year, however this may
	vary.



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Save	Click Save to create the Phase .	lĺ	Create Phase ×
			Name*
			Year 3
		Ш	Title
		н	Year 3
		н	Description
		н	Year 3 of 3 year Dietetics program
		11	11
		11	Cohort*
			Cohort 2024 🔹
			Start Date*
			08/28/2023
			End Date*
			05/27/2024
			Cancel Save

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.

hase					🗲 Ba	ck 🛓 Download 🔮 Cre
Name †	= Title	≡ Description	≡ Cohort	≡ Start Date	≡ End Date	≡ Delete
😑 Year 1	Year 1	Year 1 of 3 year Dietetics	Cohort 2023	08/19/2020	05/24/2021	Û
Block						🖸 Create 土 Downloa
Name	= Title	≡ De	scription	≡ Start Date ≡	End Date	= Delete
Fall 2020	Fall 2020	Fal	l Semester Year 1 Cohort 2023	08/19/2020	12/21/2020	Đ
Spring 2021	Spring 202	Spi	ring semester Year 1 Cohort 2023	01/05/2021	05/24/2021	0
⊕ Year 1	Year 1	Year 1 of 3 year Dietetics	Cohort 2024	08/23/2021	05/22/2022	Û
🕀 Year 1	Year 1	Year 1 of 3 year Dietetics	Cohort 2025	08/20/2022	05/25/2023	Û
🕀 Year 1	Year 1	Year 1 of 3 year Dietetics	Cohort 2026	08/21/2023	05/24/2024	Û
E Year 2	Year 2	Year 2 of 3 year Dietetics	Cohort 2023	08/23/2021	05/23/2022	Û

How to 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	Start Date and End Date for this Phase.			
Dae	This is usually one semester, however			
	this may vary from program to			
	program.			
Create	Click Create to create the Block.			

Create Block	×
Name*	
Spring 2022	
Title	
Spring 2022	
Description	
Spring 2022 Year 2 for Cohort 2024	11
Start Date*	
01/03/2022	
End Date*	
05/24/2024	
Cancel	ate



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.

Competency

	• Settings	ACEND CP Demo Program 🔹 🤌 🖉
Settings		Search
Organization and Users Curriculum Competencies Assessment	nts Rotations Reports ALL	
Users View and manage Users.		

3a. Single User Creation

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

≡ — ACEND 🍙 🛤	ashboard 📮 Rotations & Assessments	Settings			ACEND CP Demo Program	• 2 Q	
Organization and Users	Users		← Back ● Import Users	Create Users	🛓 Download Mobile Key	🍰 Bulk Upload Pict	ture
Users	Name = Role	≡ Program	= Cohort = Email	= L	ast Login	\equiv Action	

<u>IMPORTANT!</u> 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.

×

Create Users

Role*	Statu	1S *		
Preceptor	▼ Sel	ect Status		•
First Name*	Last	Name*		
Email*				
Eg: john.doe@domain.com				
			Cancel	🖹 Save



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Role	When creating	a new user it is important to select the correct role:					
	Program	Primary administrator. The program director has broad permissions to update					
	Director	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.					
	Preceptor	The preceptor role is used to identify a program preceptor or faculty. Since faculty					
	(includes	do not have their own role in the system, they must be categorized as Preceptors in					
	Faculty)	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.					
	Student	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.					
Status	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						
	Inactive status	Inactive status.					
First Name,	Mandatory fields. Email addresses should be unique to each user and will be used as a unique						
Last Name,	identifier for all non-student roles.						
Email							
Address							
Student		d for Student Role . This is a unique identifier for all student data import and should					
ID/Campus	align with student numbers in your LMS if you are importing student data. If students do not have a						
Кеу		I can number them 1, 2, 3, etc. depending on program preferences. Student ID is					
		tings, however the template for bulk upload refers to "Campus Key" and this is					
	synonymous fo						
Cohort		d for Student Role. IMPORTANT! Cohorts must be created BEFORE students can be					
		orted. See Cohorts on page 9 for more information.					
Save	Click Save to cr	eate a new user.					

Sort Columns	When clicking the Users block above, you can click the column headers to sort the column in ascending/descending alphabetical order.									
	Role \downarrow									
Search/ Filter	1. Click the hamburger icon at t	the top of the desired column you would like to filter/sort.								
	Name = Role									
	Preceptor, Duplicate Preceptor	Search								
		Searcha								
		Select All)								
	ACEND, EMS Director Program Director									



Column	Click the column header to expand/contract the column. Nouse- ver/select Mouse-over/click blue links for more information about the profile such as role and email address. Accent to SV/Excel Accent end email address Copy with Headers Copy with Headers Copy with Headers Copy Ctrl+C Copy with Headers Copy Ctrl+C Copy with Headers Copy Ctrl+C Copy Ctr
width	Cohort =
wiath	
	Click the column header to expand/contract the column.
Mouse- over/select	
	Mouse-over/click blue links for more information about the profile such as role and email address.
Export to CSV/Excel Name Image: Role Image: Preceptor Dunkicate Image: Ctrl+C Image: Preceptor Preceptor Dunkicate Image: Ctrl+C Image: Preceptor Precept	
over/select Export to	Preceptor Duplicate
	ACEND, E
	Tool Panel
	Export > CSV Export
	Right-click anywhere in the grid to export to CSV/Excel.
	View 10 ventries
	On the bottom left, click to view more entries on the page.
	<pre>>> Page 1 of 2 > >></pre>
	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.

≡ ACEND & D4	ashboard 🖵 R	totations & Assessments	Settings						ACEND CP Demo Program	• × • 🌑
Organization and Users	Users					🗲 Back	Import Users	Create Users	🛓 Download Mobile Key	🛓 Bulk Upload Picture
Users	Name	≡ Role	= 1	Program	≡ Cohort ≡	Email E		= Las	t Login 🛛 🗏 Status	■ Action

Use the template highlighted below to add user information.

Import U	sers
----------	------

Role*			us*					
Preceptor		Sel	Select Status					
Import Users*								
	Browse			Import				
Note :- Please use this Template to create a CSV file with all your Users informat	tion and upload it below.				_			



Ompetency

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

- 1	ile Hom	e Insert	Draw Page Lay	vout Formula	s Dat	;	ile Home	Insert	Draw Page Layout	Formulas	
							ne nome	Insert	Diaw Fage Layout	Formulas	
F9		- : ×	$\checkmark f_x$			A1		: ×	✓ <i>f</i> x FirstNam	0	
						~1		•	- J.	C	
	A	В	с	D	E						
1		LastName		Campuskey			А	В	С	D	
1		Lastivanic	Lindi	campuskey		1	Et at Nie and	LastName	Email	Campuskey	
1		Brown	Abrown@mail.edu	AB1234			IFILISTINAME				
1 2 3	Abigail	Brown Fawaz	Abrown@mail.edu Sfawaz@mail.edu				FirstName			Campuskey	
3	Abigail Shahar	Fawaz	Sfawaz@mail.edu	SF2345	- 11	2	Dr. Simon	Yates	Syates@mail.edu	campuskey	
3 4	Abigail			SF2345		2 3	Dr. Simon Dr. Rosalind	Yates Gold			

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.

Desktop > Upload Templates	
Name	Status
2024 Preceptor and Faculty Upload	\odot
😰 Student Upload Cohort 2024	0



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

≡ ACEND 🐽 ▷	ashboard 🖵 Rotations & Assessments 🗢 Settings	ACEND CP Demo Program • 🖌 🕰 <table-cell></table-cell>	- 2 4 🌑
Organization and Users	Import Users		+ Back To Users
Users	Role" Status"		
Curriculum			
Competencies	Cohort*		
Assessments	Cohort 2026 ·		
Rotations	Import Users*		
Reports	Student upload Cohort 2026.csv Browse Import		
	Note - Please use this template to create a CSV file with all your Users information and upload it below.		

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.

■ — ACEND ● 1	Dashboard 🖵 Rotation	s & Assessments O Setti	Ketav K								
Organization and Users	stion and Users Import Users Role* Student Cohort* Cohort* Student Cohort* Student Cohort* Student Cohort* Co								+ Back	To Users	
Users	1.000										
Curriculum	Role*			Status*							
Carried and	Student		*	Active			*:				
Competencies	Cohort*										
@ Assessments	Cohort 2026										
(Rotations	Import Users*										
	Stiadent upload Co	bort 2026.634	Erowie		import						
Reports	Note - Please use this To	mplate to create a CSV file with	altyper loars information and o	pload it beins							
	FirstName	Last Name	Ersail			Campus key	Status				
	Abigall	Brown	Abrown@mail.ed	lu.		AB1234	Valid				
	Shahar	Faunt	Stawaziji mail.ed	ia:		SF2349	Valid				
	Charles.	Scruggs	Cacruggs@mail.e	the		(53456	Valid				
	Lin	Ma	Lma@mailedu			1.004567	Invalid (Email Id is not va	(id)			
	Miguel	Rulz	Mruiz/JimaiLedu			MR5678	Vand				
						to 5 of 5				Page 1 of	(1
	Skip Invalid Reco	ids							Cancel	Send	invite
	Copyright @2024 Educa	tion Management Solutions.	All rights reserved. Applica	tion Version	2 2 2 401 195					Q	EMS

- 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.



≡ — ACEND @	Dashboard 🖵 Rotations & Ass	sessments 🔅 Settin	gs		ACEND CP Demo Prog	ram 🕒 🖌 🗛 🌑
Organization and Users	Users			← Back O Import User	s 💿 Create Users 📥 Download Mobile	Key 🍰 Bulk Upload Picture
Users	Name	Role 🖓	= Program	= Cohort = Email	≡ Last Login ≡ Stat	tus 🔤 🛛 Action
Curriculum	Brown, Abigail AB1234	 ← Back ● Import Users ● Create Users ▲ Download Mobile Key ▲ Bulk Upload Picture 				
Competencies	Fawaz, Shahar SF2345	Student	ACEND CP Demo Program		mail Act	O Create Users ▲ Download Mobile Key ▲ Bulk Upload Picture □ Last Login □ Status □ Action Active Inactive Imactive Imactive Imactive Imactive
Rotations	Learner, Amanda AL001	Student	ACEND CP Demo Program			ive Inactive

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.

User Profile Updates

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

Organization and Users	Users			+ Back	k O Import Users O Create Us	ers 📥 Download M	obile Key 🚨	Bulk Upload P	Pictu
Users	Name =	Role	= Program	≡ Cohort ≡	Email	Last Login 🛛 🗧 🛛	Status	≡ Action	n
Curricutum	Preceptor, Duplicate	Preceptor	ACEND CP Demo Program		dp@mail.com Resend activation email		Active Inactive	*	•
Competencies Assessments	ACEND, EMS Directo	Program Director	ACEND CP Demo Program		cherish.shinners@ems-works.com	01/19/2024 10:51 AM	Active Inactive	*	•
Rotations	Brown, Abigail AB1234	Student	ACEND CP Demo Program		Abrown@mail.edu Resend activation email		Active Inactive	*	•
Reports	Faculty, Sample	aculty	ACEND CP Demo Program		samplefaculty@mail.com Resend activation email		Active Inactive	~	

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

Organization and Users	Domain				🗲 Back 📥 Downloar 🕒 Create
Curriculum	Filter by Program Type	Coordinated Program (CP)	×-		
Competencies	Name	≡ Program Type ⊽	=	Description	= Delete
Competency	Domain 1 - CP	Coordinated Program (CP)		Scientific and Evidence Base of Practice: I	ntegration of scientific
Description				information show more	
Domain	Domain 2 - CP	Coordinated Program (CP)		Professional Practice Expectations: Belief	s, values, attitudes and
Assessments				behaviors fo show more	
	Domain 3 - CP	Coordinated Program (CP)		Clinical and Client Services: Development	and delivery of
Rotations				information, products show more	
	Domain 4 - CP	Coordinated Program (CP)		Practice Management and Use of Resource	es: Strategic application
Reports				of principles o show more	
	Domain 5 - CP	Coordinated Program (CP)		Leadership and Career Management: Skil	s, strengths, knowledge
				and experience r show more	

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 for accuracy.



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Organization and Users	Competency				🗲 Back 📥 Download 🔘 Cr
Curriculum	Filter by Program Type	Coordinated Program (CP)	×-	_	
Competencies	Name	Program	■ Program Type ♥	Domain	≡ Delete
Competency	CRDN 1	ALL	Coordinated Program (CP)	Domain 1 - CP	_ Delete
Domain	Sub-Competency				🛓 Downlo
Assessments	Name		■ Description		Delete
Rotations	CRDN 1.1		Select indicators of program quality and/or cust objectives.	omer service and measure achieveme	nt of
Reports					
	CRDN 1.2		Evaluate research and apply evidence-based gui literature in nutrition and dietetics practice.	delines, systematic reviews and scient	ific
	CRDN 2	ALL	Coordinated Program (CP)	Domain 2 - CP	
	CRDN 3	ALL	Coordinated Program (CP)	Domain 3 - CP	
	CRDN 4	ALL	Coordinated Program (CP)	Domain 4 - CP	
	CRDN 5	ALL	Coordinated Program (CP)	Domain 5 - CP	

Ompetency





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The accrediting agency for the Academy of Nutrition and Dietetics

Create Additional Competencies

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 Competency	×
Domain	
Local Program Domain	×-
Name*	
Local Program Competency 1	
Title	
Local Program Competency 1	
Description	
Competency to be tracked beyond those associated with ACEND requirement	ents //
	Cancel Save
Coordinated Program (CP) Domain 5 - CP	

Create Additional Sub-Competencies

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.

≡ ≪ ^{ll} ∞ ACEND 🏚 Da	shboard 📮 Rotations & Assessments	• Settings	Access Key for Mobile Apps •	Test Program -	Reverse Impersonation 🥜 🚨 🎩
Organization and Users	Filter by Program Type	Coordinated Program (CP)	×-		
Curriculum	Name	= Program Type 🖓	= Domain	= Description	= Delete
E Competencies	CRDN 1	Coordinated Program (CP)	Domain 1 - CP		
e	CRDN 2	Coordinated Program (CP)	Domain 2 - CP		
Competency	CRDN 3	Coordinated Program (CP)	Domain 3 - CP		
Domain	CRDN 4	Coordinated Program (CP)	Domain 4 - CP		
	CRDN 5	Coordinated Program (CP)	Domain 5 - CP		
Assessments	KRDN 1	Coordinated Program (CP)	Domain 1 - CP		
Rotations	KRDN 2	Coordinated Program (CP)	Domain 2 - CP		
	KRDN 3	Coordinated Program (CP)	Domain 3 - CP		
Reports	KRDN 4	Coordinated Program (CP)	Domain 4 - CP		
	E KRDN 5	Coordinated Program (CP)	Domain 5 - CP		
	Local Program Competency 1	Coordinated Program (CP)	Local Program Domain	Competency to be	tracked beyond those
				associated with AC	END requirements
	Sub-Competency				O Create 🛓 Download
	Name		E Description		Delete
		B Sottings		C Access Key for Mobile	Apps - 1
		Create Sub-Competence	tency		K < Pare 0 of 0 > >1
		10			
		Name*			
		Name			
		Title			
		Description			
					11
				Consul	Currente





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

Click Settings > Curriculum > Populations and Diverse Cultures (Follow the same steps for Conditions or Disease States, and Graduate Program (GP) Skills, if applicable.)

≡ 📰 ACEND 🐽	Dashboard 📮 Rotations & Assessments	Settings		ACEND GP Demo Program 🔹 🥜 🚇
Organization and Users	Populations & Diverse Cultures			← Back 📥 Download 🔿 Create
🛞 Curriculum	Name	= Title	■ Description	Delete
Program	Infrate	Infante	Infants	Click +Create to add new
Specialty Click th	e item name to review	current ACEND content	Children	content
Cohort	Adults	Adults	Adults	
User Groups	Pregnant & Lactating Females	Pregnant & Lactating Females	Pregnant & Lactating	Females
Course	Older Abuits People with Disabilities	Older Adults People with Disabilities	Older Adults People with Disabilitie	es
Phase	Immigrant Families	Immigrant Families		۵
Populations & Diverse Cultures GP Skills	View 10 v entries.	e item name to <i>edit</i> program cont		Use trashcan to remove
Conditions or Disease States			L	program created content
Competencies		tions or Disease States & Il (if applicable)		



5. Rotations (All Program Types Except DPDs)

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

ttings			
Organization and Users	Curriculum Competencies	Assessments Rotations Reports ALL	
(
	Sites View Sites.	Rotation Overview View and manage Rotation Overview.	Rotation Details

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.

Organization and Users	Sites			← Back 🕹 Download ᆂ Im	port Sites 🛛 🕒 Create
Curriculum	Name	≡ Туре	≡ Address ≡ Contract End Date ≡ Rotation Overview	≡ Status	♡ ≡ Delete
Competencies	Chester County Hospital	Hospital	One Hospital Dr.	Draft	✓ [□]
Rotations	Chester County WIC	WIC	427 Upper Street Rd.	Draft	~ û
Sites	Diabetes Hospital	Hospital	Clinical Rotation	Active	~ ū





General Information Tab

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 *.

≡ ACEND ● □	Pashboard 📮 Rotations & Assess	sments 🗢 Settings			ACEND CP Demo Program 🔹 🖌 😃 🌑	
Organization and Users	General Info Sites Use	rs Shifts				
Curriculum	Name *		Type *		Logo	
Competencies	Montgomery County WIC		WIC	•	Upload a Logo	
Assessments	Address		City		State	
Rotations	123 N. Broad St.		Anytown		PA	
Sites	Zip 12345		Back of building, follows	idewalk between the bank and the WIC sign c	Notes This WIC office serves a predominanty Hispanic population	
Rotation Overview			back of building. Fortuna	increase of the and the the agent	1	
Rotation Details	Contract Start Date	Contract End Date	Renewal Date	Status	Rotation Overview Add /Modify	
Reports	01/01/2023	12/30/2024	10/01/2024	Active •	Clinical Rotation	
					Cancel Save	

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.
Туре	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
Status	Active.
Save	You MUST click Save . Selecting "cancel" and "back to sites" will NOT save your information or updates.

Site Users Tab

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

eneral Info Sites Users Shift:	5			• Add Preceptor
Name	= Email	🗧 📔 Phone Number	≡ Role	= Delete
Preceptor, Duplicate	dp@mail.com		Preceptor	۵
		select Preceptor: ift Filter ✓ Preceptor, Miranc		×
				Cancel 🖺 Save





Shifts Tab

1. Click **Add Shifts** to create shift rotations available to students. Shifts will display on Preceptor dashboards once rotations have been created and assigned.

General Info Sites Users	L	Shifts							0	Add Shifts		
Name †	=	Start Date	=	End Date	 Shift Time	=	Week Days	🗧 Max Participants	=	Del		
AM Shift WIC		01/01/2024		01/18/2025	9:00 AM - 12:00 AM		Mon,Tue,Wed,Thu,Fri	Settings		-		
PM Shift WIC		01/01/2024		12/31/2024	12:00 PM - 4:00 PM		Mon,Tue,Wed,Thu,Fri	Create Shift				
Tuesday Thursday WIC Shift		01/01/2024		01/31/2025	9:00 AM - 5:00 PM		Tue,Thu					
					1 to 3 of 3			Name *			Max Participants	
	-							Tuesday Thursday WIC Shift			2	

2. You MUST click **Update/Save**.

Create Shift	\$
Name *	Max Participants
Tuesday Thursday WIC Shift	3
Start Time *	End Time *
^ ^	^ ^
09 : 00 AM	05 : 00 PM
* *	× ×
Start Date*	End Date *
01/01/2024	01/31/2025
Weekdays	
Sun Mon Tue Wed	Thu Fri Sat
	Cancel 🕒 Save

Cancel

Submit

Bulk Upload Sites

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

≡ — ACEND @	Dashboard 📮 Rotations & Assessments 🕈 Settings		ACEND CP Demo Pr	rogram 🔹 🖌 🔔
Organization and Users	Sites		← Back 📥 Download	▲ Import Sites O Create
Curriculum	Name	≡ Type ≡ Address	Contract End Date Rotation Overview	≡ Status ♡ ≡ Delete
Competencies	Diabetes Hospital	Hospital	Clinical Rotation	Active 🗸 🛍
Assessments	Montgomery County WIC	100 100 100 100	Settines	×
B Rotations		WIC 123 N. Broad St.	Upload Sites	^
Sites	View 10 View entries.		Upload File *	
				Browse
Click the Te	mplate link to download ar	d complete the Sites	Note :- Please use this Template to create a XLSX file with all your	Sites information and upload it.

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.





	le H	ome In	sert Dra	w Page Layout F	ormulas	Data R	eview View	v Autor
L8		•	× v	fx				
		Α	В	С	D	E	F	G
1	Name		Туре	Address	City	State	Zip	Location
	Chester	County W	WIC	427 Upper Street Rd.	West Che	sterPA	19472	Street Ro
2	chester			One Hospital Dr.	Paoli	PA	19746	First Floo
2 3		County H	Hospital	One Hospital Dr.				

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

Upload Sites	×
Upload File * Rotation Site uploads 2024.xlsx	Browse
Note :- Please use this Template to create a XLSX file wit	th all your Sites information and upload it.
	Cancel
Hospital	

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.

Sites					🗲 Back	La Download La Import Sites Ore
	Name	≡ Туре	≡ Address ≡	Contract End Date	≡ Rotation Overview	\equiv Status \equiv Delet
	Chester County Hospital	Hospital	One Hospital Dr.			Draft 🗸 🖨
	Chester County WIC	WIC	427 Upper Street Rd.			Draft 🗸
	Diabetes Hospital	Hospital			Clinical Rotation	Active 🗸 🕯
	Montgomery County WIC	WIC	123 N. Broad St.	12/29/2024	Clinical Rotation	Active 🗸





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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.

Create Rotation Overview	×
Name *	
Pediatric Rotation	
Is Dependent	
Select Dependent Rotation Overview	•
Specialty *	
Select Specialty	-
Enable Patient Encounter	
Enable Rubric Evaluation	
Rotation Overview Director	
Select Rotation Overview Director	-
Objective	
	h
Assign Color	
#A15E8F	

Name	Mandatory field. Displays on the dashboard and all cohort dropdown menus . <u>Name must be unique to</u> the rotation.
ls 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 on page 7 to create specialties.
Enable Patient Encounter	Must be checked if students are to complete patient encounter notes in Competency. For more information on Patient Encounter Notes, see page 34.
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.

Rotat	ion Overview				← Back	▲ Download 🗣 Create
	Name	= Specialty	≡ Primary Preceptor	≡ Objective	\equiv Patient Encounter \equiv	Status = Act
	CP-Rotation Overview	Specialty For Program CP			Manage	Active 🗸 🖪 🛍
	Pediatric Rotation	Pediatric Nutrition			Manage	Active 🖌 🗈 🏛
View	0 🗸 entries.		1 to 2 of 2			<pre> < Page 1 of 1 > >)</pre>





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**.

Create Individual Rotations

Click Settings > Rotations > Rotation Details > Create.

tation Details		🗲 Back	🛓 Download 🔔 Import	Rotation Details • Create
ilters				
otation Overview	Cohort	Block		
Clinical Rotation	- All	- All		Apply
] Site \equiv Rotation Overv \equiv	${\sf Cohort}\ \equiv\ \ {\sf Block}\ \ \equiv\ \ {\sf Start}\ {\sf date}\ \ \ \equiv\ $	End date \equiv Submission du \equiv Shifts	≡ Preceptor ≡	Status = De
		No data available		

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 *.

Organization and Users	Edit Rotation Details - WIC Rotation					+ Back to
Curriculum	General Info Students Preceptors					
Competencies						
Assessments	Site*		Cohort *		Phase*	
	Montgomery County WIC	•	Cohort 2024	•	Year 3	×-
Rotations	Block*		Rotation Overview*		Start Date*	
Sites	Rotation 3	×-	WIC Rotation	•	01/02/2024	
Rotation Overview	End Date		Submission Due Date		Status	
Rotation Details	03/15/2024		03/14/2024		Active	-
Reports	Enable Mid-Term Assessment		Final Assessment Due Date		мајот	
	No	•	Select end date		No	-
	On-Site/Virtual		Number of Virtual Hours		Number of On-Site Hours	
	Virtual		0		0	

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	Populate the rotation start and end date fields. If the rotation is not associated with a previously
Block	created Phase and Block, complete the Start Date and End Date fields manually. Note: These dates



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	indicate the dates your learners and preceptors will have access to complete Patient Encounter
	Notes and Checklist Evaluations within the Competency app.
Rotation	Adds the details and evaluations created in the selected Rotation Overview to the Rotation Details.
Overview	
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

Edit Rotation Details - WIC F	Rotation		← Back to List					
General Info Students	Preceptors							
L			• Add Preceptor					
Preceptor Name	≡ Preceptor Email		= Delete					
No data available								
		0 to 0 of 0	I< ≤ Page 0 of 0 ≥ ≥I					

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

Select Preceptors	×
Filter	
Preceptor, Amy Preceptor, Miranda	
Cancel	Add



right. Academy of Nutrition and Dietetics

Click the Students Tab > Add Students.

Edit F	Rotation Details - WIC Rotation		← Back to List
Ger	eral Info Students Preceptors		
			Cohort 2024 Add Students
St	udent Name \equiv Submission due date \equiv Student Email	≡ Student Contact ≡ Preceptor Name	
		No data available	
		0 to 0 of 0	I< ≤ Page 0 of 0 ≥ >1

- 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.

Add Students	×
Preceptor	
Select Preceptor	
Preceptor, Duplicate	
Preceptor, Miranda	
Filter	
Learner , Amanda	
Gitudent , Beth	
Cancel	Save

Click Save. .

	Rotatio	on Details								🗲 Back 🖌	b Downl	load 🕹 Im	port Rota	ation Detail	s	O C
Students and	Filter	s														
ceptors have v been added		ion Overview Rotation			•	Cohort All		•	All					•	A	pply
he Rotation ails.		Site ≡ Diabetes	Rotation Overv ≡	Cohort ≡	Block ≡ Fall 2021	Start date 08/23/2021		≡ Submis	sion du \equiv	Shifts Default Shift		Preceptor Preceptor, Mirar		Status	=	De
	0	Hospital Diabetes	WIC Rotation	2024 Cohort	Spring	01/05/2021	05/24/2021	05/28/2	021	Default Shift				Active	~	
		Hospital Montgo	WIC Rotation	2023 Cohort	2021 Rotation 3	01/02/2024	03/15/2024	03/14/2	024	Default Shift		Preceptor, Mirar	nd	Active	~	



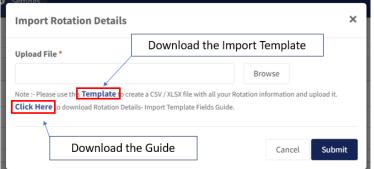
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2. Bulk Upload Rotation Details

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

≡ 📰 ACEND 🔹	Dashboard 🖵 Rotations & Assessments 💿 Settings			ACEND CP Demo Program 🔹 🥜 \\
Organization and Users	Rotation Details		← Back 📥 0	Download 1 Import Rotation Details • Creat
Curriculum	Filters			
Competencies	Rotation Overview	Cohort	Block	
See Assessments	WIC Rotation	• All	- All	- Apply
Rotations				
Sites	\Box Site \equiv Rotation Overv \equiv Cohort \equiv Blo	ck \equiv Start date \equiv End date	≡ Submission du ≡ Shifts	\equiv Preceptor \equiv Status \equiv De
Rotation Overview	Montgo WIC Rotation Cohort Rot County 2024	ation 3 01/02/2024 03/15/2024	4 03/14/2024 AM Shift WIC	Active 🗸 🖬 🖬
Rotation Details	wic			
Reports	Montgo WIC Rotation Cohort Fall County 2025 WIC	2022 08/23/2022 12/20/2022	2 Default Shift	Archived 🗸 🔒
	View 10 Ventries.	1 t	to 2 of 2	10 C Page 1 of 1



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

	А	В	С	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.



Ompetency

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	No	Sub-Rotation – Mid-Term Assessment Due Date
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





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 (for Graduate Programs only).

Competency

6a. Checklists (For All Program Types Except DPDs)

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 selfassessments.

Click Settings > Assessments > Checklists > Create

Organization and Users	Checklists					🔶 B	Back 🛛 🔿 Crea
Curriculum	Name = Q	uestions 🔳	Rotation Overview =	AssessmentType	Status	≡	Action
Competencies	Juvenile Diabetes Presentation Checklist	Change	Diabetes Hospital Rotation	Summative	Active	~	B 0
	Presentation Checklist	Change	Disorded Eating, MNT I - Course	Summative	Active	~	16 O
Assessments	Type II Diabetes Presentation Checklist	Change	Diabetes Hospital Rotation	Summative	Active	~	ŭ 0
Checklist	WIC Infant Presentation Checklist	Change	WIC Rotation, MNT I - Course	Summative	Active	~	16 O
CHECKIN	WIC Mother Presentation Checklist	Change	WIC Rotation	Formative	Active	~	16 û
Rubric	View 10 🗸 entries.		1 to 5 of 5				< < Page 1 of 1
Rotations							

Name	Name the Checklist. Think of this	tajjans & Assessments 🚓 Settings Dro	gram CP
	checklist as your original copy. This	Create Checklist	×
	checklist may be assigned to	Name*	
	multiple rotations.	Pediatric Nutrition	
Assessment	Select an assessment type	AssessmentType*	
Туре	(Formative or Summative).	ClinicalEvaluation	•
Description	Add a brief description of checklist	Description	
	contents. This is only seen by the		
	Program Director.		li
Instructions	Add instructions for preceptor	Instructions	
	completing the checklist.		1.
Include	Check this box to allow preceptors	Include narrative feedback box in checklist	
narrative	to include feedback comments	Disable checklist submission for Learner role	
feedback	with the checklist.	Checklist Rotation Availability	
Disable	Check this box if you do NOT want	5 Day	-
checklist	learners to complete the checklist.		Cancel Save
	This feature disables this checklist		
	from peer and self-evaluation.		
Checklist	Select how long the checklist		
Rotation	should remain available.		
Availability			
Save	Click Save to create the checklist.		

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

Checklists		← Back O Create
Name Pediatric Nutrition View 10 🗸 entries.	E Questions	w = AssessmentType = Status = Action ClinicalEvaluation Active Image: Clinical Evaluation Image: Clinical Evaluation 1 to 1 of 1 Image: Clinical Evaluation Image: Clinical Evaluation
Question	Create the checklist question.	Add New Question ×
Enter Options	Click this box to create a set of checklist responses for this question.	Question* Obtains relevant information from patient interview to formulate nutrition care plan I Enter options
Sub- Competency	Map an ACEND Sub-Competency (CRDNs/PIs for GPs) to this checklist question.	Sub-Competency CRDN 1.1 Populations
Populations/ Diverse Culture	Map populations and cultures to this checklist question.	Children X - Diverse Cultures Select Diverse Cultures -
Disease State	Map a disease state to this checklist question.	Disease States Malnutrition
Skills (GPs only)	Map skills to this checklist question.	Cancel 🕒 Save
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.

Checklis	st - Pediatric Nutrition					← Back
Checkli	st Details					0
=	Question	Sub-Competency =	Populations	Diverse Cultures	Disease States	Action
≡	Obtains relevant information Selected from patient interview to	CRDN 1.1	Children 🗸	Select 🗸	Malnutrition ~	D
Add New	formulate nutrition care plan					





6b. Rubrics (All Program Types)

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

Click Settings > Assessments > Rubrics > Create.

E 📰 ACEND 🛛 👁 🛛	ashboard 🖵 Rotations & Assessments	• Settings		ACEND CP Dem	o Program 🔹 🖌 🔱
Organization and Users	Rubric				🗲 Back 🗿 Crea
Curriculum	Name	= Criteria		≡ Status	Action
Competencies	Disorded Eating Nutrition Care Process	nd Charting Manage	Summative	Active	✓ 10 ±
	Geriatric Diabetes Nutrition Care Proces	s and Charting Manage	Summative	Active	× 10 0
Assessments	Nutritian Literacy Rubic Assessment	Manage	Formative	Active	✓ 10 0
Checklist	WIC Child Nutrition evaluation	Manage	Formative	Draft	× 16 0
Checkling	WIC Nutritian Literacy Rubic Assessment	Manage	Formative	Active	× 10 0
Rubric	View 10 🗸 entries.		1 to 5 of 5		IC C Pagelofi

Description	formative or summative. Add a brief description of rubric	
Туре	dropdown menu provided. ACEND Assessment Types may be formative or summative.	Description
Assessment	2024 when assigned. Select an assessment type from the	AssessmentType* Select AssessmentType
	given a specific assignment name. For example: the WIC Child Nutrition Evaluation may be renamed WIC Child Eval Spring	Name*
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	Softings Create Rubric X





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).

ubric Details													
ame IIC Child Nutrition evaluation		AssessmentType Formative		se Cultures	Description		Instructions						
Select Competency	•	Select Populati				•	Select		•				
							Performance Standards						
Criteria + AddLevel Not	t Observed	🖬 N/A	0	Level 4	O NA 4	8	Level 3 🗆 N/A 3 🛱	Level 2	🗆 N/A 2	8	Level 1	O N/A 1	8 Actio
Review Child Nutrition Chart with Parent and Not	t Observed			Enter Description			Enter Description				Enter Descriptio		

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**.

bric - WIC Child Nutrition evaluation						
ubric Details						
lattie			cription	Instructions		
IIC Child Nutrition evaluation		Formative				
Competency		Populations & Diverse Cultures Children		Conditions or Disease States		
0011		Cinden		/		
				/		
		Select Items HE	RE	Performance Standards		
Criteria + A	Id Level Not Observe	for Rubric Level Ma	apping	Level3 🗆 N/A 3	B Level 2 D NJA 2	
I Beview Child Nutrition Chart with Parent and Child	Not Obverve	E Unior Description		Enter Description	Error Description	
	,					
Competency						
CRON 1.1 ×						
Populations & Diverse Cultures						
Children X		Selected Items display	HERE 4		1.	,
	_	for Rubric Level Map				
Conditions or Disease States		TOT RUDITE Level Map	Jing			





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**.

Child Nutrition (evaluation								+	Back	😫 Sav
-		- Conditio	ins or Disease State	15		•					
	Check boxes to en	able	Standards @	r							
Not Observed			□ N/A 3	8	Level 2	□ N/A 2	0	Level 1	□ N/A 1	0	Action
Not Observed	jery Good	Good			Fair			Poor			
] #		11			h			h	
	Net Observed	Check boxes to en Criteria Level Map DO NOT SELECT Item	Select Reputations & Diverse Cultures Select Net Observed Check boxes to enable Criteria Level Mapping DO NOT SELECT Items here. Not Observed Jery Good Select Items HERE for	Select Reputations & Diverse Cultures Select Check boxes to enable Criteria Level Mapping DO NOT SELECT Items here. MA 3 Not Observed Select Items HERE for	Select Items HERE for	Select Republicions & Diverse Cultures Check boxes to enable Criteria Level Mapping DO NOT SELECT Items here. Not Observed Fair Select Items HERE for	Select Republicions & Diverse Cultures Check boxes to enable Criteria Level Mapping DO NOT SELECT Items here. Not Observed Fair Select Items HERE for	Select Republicions & Diverse Cultures Select Check boxes to enable Criteria Level Mapping DO NOT SELECT Items here. Not Observed Fair Select Items HERE for	Select Republicions & Diverse Cultures	Select Republicions & Diverse Cultures Select Check boxes to enable Criteria Level Mapping DO NOT SELECT Items here. Not Observed Poor Select Items HERE for	Select Reputations & Diverse Cultures Select Check boxes to enable Criteria Level Mapping DO NOT SELECT Items here. Not Observed Select Items HERE for

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 **Assign Assessments** on page 36.

ACEND 🐽	Dashboard 🖵 Rotations & Assessments 💶 💠 Set	tings			ACEND CP Dem	o Program	· / 0
Organization and Users	Rubric						← Back 🕒 C
Curriculum	Name	≡ Criteria		=	Status		Action
Competencies	Eating Nutrition Care Process and Charting	Manage	Summative		Active	~	16 a
	Geriatric Diabetes Nutrition Care Process and Charting	Manage	Summative		Active	~	IC O
Assessments	Nutritian Literacy Rubic Assessment	Manage	Formative		Active	~	16 O
Checklist	WIC Nutrition Literacy Rubic Assessment	Manage	Formative		Active	~	16 O
Checkina	View 10 V entries.		1 to 4 of 4		Inactive Active	_	K < Page 1 of
Rubric					Draft		

6c. Patient Encounter Notes (All Program Types Except DPDs)

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.

Rotation Overview		← Back
Name Community Rotation		■ Patient Encounter/Chec ■ St Manage A
View 10 v entries.	1 to 1 of 1	





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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.

ACEND & Dashboard Rotations & Assessments Settings				ACEND CP Demo Pro	ogram •	1	Δ (
Set a Target for the number of Patien	t						🗲 Bac
Encounters to be completed a Rotation							
Competencies							
mmunity - Manage Patient Encounter / Checklist							🗲 Ba
Patient Encounter setup							
General Info 🍞 Patient Information 🍞 🕇							
Target ES Save						🕒 Add Q	Question
■ Question					Action	1	
lick + Add Question to create a new	Add Question Question Type *		Is Mandator	y Si	gn-off		×
uestion within a category of the patient		~	Is Mandator	y Si	gn-off		×
	Question Type *	~	Is Mandator	y si	gn-off		×
uestion within a category of the patient ncounter	Question Type * Text Input Checkbox Radio button	~	Is Mandator	y Si	gn-off		×
uestion within a category of the patient neounterSelect the question type and select	Question Type * Text Input Checkbox	~	Is Mandator	y Si	gn-off		×
 uestion within a category of the patient acounter Select the question type and select if mandatory or preceptor sign off 	Question Type * Text Input Checkbox Radio button	~	Is Mandator	y Si	gn-off		×
uestion within a category of the patientncounterSelect the question type and select	Question Type * Text Input Checkbox Radio button Text Input Number Input Dropdownlist Text Area		Is Mandator	y si	gn-off		×
 Select the question type and select if mandatory or preceptor sign off required. 	Question Type * Text Input Checkbox Radio button Text Input Nomber Input Dropdownlist Text Area Datepicker	~	Is Mandator	y Si	gn-off		×
 estion within a category of the patient noncounter Select the question type and select if mandatory or preceptor sign off required. Create a Question Title and fill out 	Question Type * Text Input Checkbox Radio button Text Input Number Input Dropdownlist Text Area		Is Mandator	y Si	gn-off		×
 uestion within a category of the patient non- ncounter Select the question type and select if mandatory or preceptor sign off required. 	Question Type * Text Input Checkbox Radio button Text Input Nomber Input Dropdownlist Text Area Datepicker		Is Mandator	y Si	gn-off		×

The Patient Encounter Note is now created and associated with this Rotation Overview.

≡ 📰 ACEND 🏚 D	Dashboard 📮 Rotations & Assessments 🔹 Settings	ACEND CP Demo Program	- Z.	۵
Organization and Users	WIC Rotation - Manage Patient Encounter / Checklist			🗲 Back
Curriculum	Patient Encounter setup			-
Competencies	General Info Z Medical Information Z Breastfeeding information Z Home Safety Z +			
Assessments	General Info 🖉 Medical Information 🕼 Breastfeeding information 🍞 Home Safety 🍘 +			
Rotations	Target 😫 Save		O Add Q	uestion
Sites	Question Click the question title to edit the question rinput		Action	
Rotation Overview Rotations	Patient Height	Ð	Û	
	Image: Second		ů ů	
Reports				
Use these icon	ns to rearrange questions Delete questions or Mandatory cotti	-		
	Mandatory setti	ngs	1	





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	Assigned with the rotation and completed by students in the Competency app. They are
Notes	created as part of a rotation.

Competency

7a. Assign Rubric Assessments (All Program Types Except DPDs)

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

E ACEND 🐽 Dashboard 🖵 Rotations & Assessment	A settings	ACEND CP Demo Program 🔹 🖌 🚨
Rotations B. Students	Assessments - All Students	Hours Tracking Add Rubric Assessment Refresh
Search Rotations by Name Search by Student		4.
Diabetes Hospital (01/02/2024 - 03/15/2024) 2. Students	Rubric Checklist 3. □ Name □ □ Course □ AssessmentT □ Rubric □	Progress Status Action
Montgomery County WiC (01/02/2024 - 03/15/2024 Discussion Fill (01/02/2024 - 03/15/2024) Student, Beth	Geriatric Diabetes Clinical Rotations Summative Geriatric Diabet Student Evaluati Nutrition Care Process	Assigned to 2 student(s) View 22 a
Princeton EDU (01/02/2024. A Rotation must be selected when ad *NOTE* Competency will always default t The Program Director MUST select t	the <i>first</i> rotation on the list.	IC < Page 1 of 1 > >I

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	Select an assessment type from the dropdown
Туре	menu provided. <i>Note:</i> 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	Rubrics are reused many times during the course of
Assessment	a rotation. Select if this is a Mid-Term, Final, or
Туре	Other rotation.
Rubric	Select a pre-created rubric from the dropdown
	menu. Competency is only showing rubrics created
	under the Assessment Type selected above.

Add Rubric Assessment	×
Name*	
WIC Child Nutrion Literacy Spring 2024	
Description	
	h
Course*	AssessmentType*
Clinical Rotations •	Formative •
Rotation Assessment Type *	
Other •	
Rubric*	
WIC Nutritian Literacy Rubic Assessment	-
Assessment Method*	
Student Evaluation	-
Share Assessed Rubric with Student(s)	
Student(s)*	
Learner , Amanda x Student , Beth x	•
	Cancel 🖺 Save



Competency

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Assessment	Student Evaluations are performed by a preceptor, including faculty members assigned in a
Method	preceptor role. Self and peer evaluations are performed by students.
Share	Share the full rubric details including comments with students upon completion. Note: Selecting
Assessed	to Share Assessed Rubric with Students turns off the "Reassess Learner" function. Deselect
Rubric with	this option if students need to be reassessed or rubrics need to be updated.
Students	
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 (All Programs Except DPDs)

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

≡ 📰 ACEND 🐽	Dashboard 🖵 Rotations & Assessments	Settings	ACEND CP Demo Program	- 2 4 🕓
Organization and Users	Rotation Overview	1.	← Back 📥 🕯	Download 🕒 Create
Curriculum	□ Name = s	ipecialty	≡ Patient Encoun ≡	Sta ♡ = Ac
Competencies	Community	Vomen, Infants and Children (WIC) hther Specialty	Manage Manage	Active V 🖸 🖬
Assessments	Disorded Eating	bisorded Eating	Manage	Active 🛩 🖪 🗎
Rotations	2 WIC Rotation	ther Specialty Yomen, Infants and Children (WIC)	Manage Manage	Active V C C
Sites	View 10 Ventries.	1 to 5 of 5	5.	<pre>>> Page 1 of 1 > >></pre>
Rotation Overview	3.	WIC Rotation - Manage Patient Encounter / Checklist Patient Encounter setup		← Back +
Checklists are alway	ys associated with	Checklist Evaluation		Add Checklist
rotations and are lo Overview .	ocated within Rotation	Image: Checklist Image: Tatal Required Image: WKC Indust Presentation Checklist 3	Status Show Hide	= Delete 6.
• Checklists creat	ted are available to	r Sektilings		

add to the Rotation Overview.

- Use the **Filter** to search available checklists.
- If no checklists are available, see page 30 on Create a Checklist.
- 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.**

Select Checklist		×
Filter		
Presentation Checklist		
Juvenile Diabetes Presentation Checklist		
WIC Mother Presentation Checklist		
Type II Diabetes Presentation Checklist		
	Cancel	🖺 Save
tion. This number may vary.		
ck.		

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 (All Program Types Except DPDs)

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

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.**

≡ ACEND ● □	ashboard 📮 Rotations & Assessment	CEND CF	P Demo Program 🔹 🖌 🕰 🧕
Rotations	<u>D.</u> Students	Assessments - All Students Clinical Hours	Tracking Add Rubric Assessment Refresh
Search Rotations by Name			
Diabetes Hospital (01/05/2021 -	Search by Student	Rubric Checklist	
05/24/2021)	All Students	Name	Status
Diabetes Hospital (08/23/2021 - 12/21/2024)	Learner, Amanda	Care and Process NUTR 100 Intro t Summative Nutrition Care P Student Evaluati, Assigned to 2 student(s)	Start 🕼 🖻
Montgomery County WIC (01/02/2024 - 03/15/2024)	Student, Beth	Class Rubric NUTR 100 Intro t Formative Rubric 1 Student Evaluati Assigned to 1 student(s)	Start 🕼 🖻
		View 20 v entries. 1 to 2 of 2	<pre>> Page 1 of 1 ≥ >)</pre>

- 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.

Student	💄 Learner, Amanda						
Search				Performance Standards			
💄 Learner, Amanda							
Student, Beth	Criteria	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	Occasionally unacceptable; much improvement needed to meet minimum standards	No rating possible; inadequate opportunity to observe, not able to judge, not applicable	



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Student	3 Learner, Amanda						
Search Q	Criteria	Very Good	Good	Fair	Poor	Not Applicable	 Click a perform
Learner, Amanda	Nutrition Assessment included: Assessment of nutritional status	Consistently does well; often exceeds expectations	Satisfactory; overall acceptable	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	standard for each of on the rubric asses
	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	Performance st highlight in green a
	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	 are selected.
	Nutrition Assessment included:	Consistently does well; often	Satisfactory; overall acceptable	Performance adequate some of	Occasionally unacceptable;	No rating possible; inadequate	

- 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.

Care and Process Chartin						
Student	💲 Learner, Amanda	Add Narrative		×		
Search Q	Nutrition Assessment included:	Co		^	Occasionally unacceptable;	No rating possible; inadequate
💄 Learner, Amanda	Evaluation of nutrition intervention	The created goals are t	oo vaque. Please restate goals and ma	ske suer they are	much improvement needed to meet minimum standards	opportunity to observe, not able to judge, not applicable
Student, Beth		measurable.]				an fan first nan af finnen an f
	Outlined timeline of treatment and effect on patient's nutritional status	Ca ent.		Cancel Save	Occasionally unacceptable; much improvement needed to meet minimum standards	No rating possible; inadequate opportunity to observe, not able to judge, not applicable
				desired to reach expected performance	U	
	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
	Plans are thorough and coincide with patient goals.	Consistently does well; often exceeds expectations	Satisfactory; overall acceptable	Performance adequate some of the time; somewhat	Occasionally unacceptable; much improvement needed to	No rating possible; inadequate opportunity to observe, not able



- 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.



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Student		💄 Learner, Amanda 🔤					
Search	Q				performance		
Learner, Amanda		Goals are measurable to determine desired outcomes.	Consistently does well; often exceeds expectations	Satisfactory; overall acceptable performance	Performance adequate some of the time; somewhat	Occasionally unacceptable; much improvement needed to	No rating possible; inadequate opportunity to observe, not able
Student, Beth					inconsistent; improvement desired to reach expected performance	meet minimum standards	to judge, not applicable
		Plans are thorough and coincide with patient goals.	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
		Overall Narrative					
		Nice Job, Amanda. Please see me w	hen you have reassesed your nutriti	on goals for this client.			
						1	
Care and Process (Boost - Construct of Construct Spring 2024	63 6 Velines				DSC Save B Save &
Care and Process (01 O Sellines				
Care and Process (Spring 2024	1 O selanes				
Care and Process (Student	Charting	Spring 2024	83 O selange		Performance Standards		
Care and Process (Student Search	Charting	Spring 2024	3 • • • • • • • • • • • • • • • • • • •	Good	Performance Standards Fair		
Care and Process C Student Search Learner, Amanda	Charting	Spring 2024		Good Satisfactory; overall acceptable performance			all E P Jema Vinistan
Care and Process C Student Search Learner, Amanda	Charting	Spring 2024 Student, Beth Criteria Nutrition Assessment included:	Very Good Consistently does well; often	Satisfactory; overall acceptable	Fair Performance adequate some of the time; somewhat inconsistent; improvement desired to reach expected	Peor Occasionally unacceptable; much improvement needed to	Not Applicable Nor tapport in the observe, no table

• 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.

≡ — ACEND &	Dashboard 📮 Rotations & Assessment	s 💿 🗢 Settings	ACEND CP Demo Program 🔹 🦨 🗘
P Rotations	ඩ Students	Assessments - All Students	Clinical Hours Tracking Add Rubric Assessment Refres
earch Rotations by Name			
Diabetes Hospital (01/05/2021 -	Search by Student	Rubric Checklist	
05/24/2021)	All Students	Name Course AssessmentT Rubric Method	Progress Status Action
Diabetes Hospital (08/23/2021 - 12/21/2024)	Learner, Amanda	Care and Process NUTR 100 Intro t Summative Nutrition Care P Student Evaluati.	Assigned to 2 student(s)
Montgomery County WIC (01/02/2024 - 03/15/2024)	Student, Beth	Charting Spring 2024 Class Rubric NUTR 100 Intro t Formative Rubric 1 Student Evaluati.	Assigned to 1 student(s)
		View 20 V entries. 1 to 2 of 2	K < Pagelofl>⊃





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.

≡ — ACEND @	Dashboard 📮 Rotations & Assessmen	s 2 • Settings	ACEND CP Demo Program 🔹 🛃 🚨
Rotations	<u>ඩ</u> Students	Assessments - All Students	Clinical Hours Tracking Add Rubric Assessment Refresh
Search Rotations by Name			
Diabetes Hospital (01/05/2021 -	Search by Student	Rubric Checklist	
05/24/2021)	All Students	Name Course AssessmentT Rubric Method	Progress Status Action
Diabetes Hospital (08/23/2021 - 12/21/2024)	Learner, Amanda	Care and Process NUTR 100 Intro t Summative Nutrition Care P Student Evaluati Charting Spring 2024	1/7 Continue
Montgomery County WIC (01/02/2024 - 03/15/2024)	Student, Beth	Class Rubric NUTR 100 Intro t Formative Rubric 1 Student Evaluati	Assigned to 1 student(s)
		View 20 V entries. 1 to 2 of 2	K ← Page1of1 > ⊃

To review completed Rubrics, click **Assessments >** Find the Rubric **> View**

E ACEND 🛚 Dashboard	Assessments Settings			ACEND DPD Demo Program	 Reverse Ir 	mpersonation 🥜 🗘	
Assessments - All Students	1.					Add Rubric Assessment	Refresh
Name	\equiv AssessmentType \equiv	Rubric =	Method =	Progress	Status	Action	
Diatetics Assessment NUTR 119 M	edical Nutr Formative	Test Rubric	Student Evaluation	Assigned to 1 student(s)	View	C 🗎	
MNT Assessment NUTR 119 M	edical Nutr Formative	Test Rubric	Student Evaluation	Assigned to 1 student(s)	View 3.	2 8	
	edical Nutr Summative	Nutrition Literacy Rubri	Student Evaluation	Assigned to 2 student(s)	View	2 8	
View 20 Ventries.		1 to 3 of 3				IK i Kinge 1	of1 >⇒

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 <u>eliminated and</u> <u>replaced</u> by the new **Rubric Assessment**.

To reassess a learner, click Assessments > Find the rubric you would like to reassess > click the Edit icon

ACEND	🚯 Dashboard 🖵 Assessme	ents 🗘 Settings				ACEND DPD Demo Progra	m •	Reverse Impersonation 🦨 🗘	
ssessments - All Studer	its	1.						Add Rubric Assessment	Refrest
Name	≡ Course ≡	AssessmentType	= Rubric	≡ Method	=	Progress	Status	Action	
Diatetics Assessment	NUTR 119 Medical Nutr	Formative	Test Rubric	Student Eval	uation	Assigned to 1 student(s)	View	C 🕯	
MNT Assessment	NUTR 119 Medical Nutr	Formative	Test Rubric	Student Eva	uation	1/1 Assigned to 1 student(s)	View	َ ^ر 3.	
Nurtition for Behavioral Healt Close Read Rubric- Spring 202		Summative	Nutrition Literacy Rubr	i Student Eval	uation	Assigned to 2 student(s)	View	8	
iew 20 🗸 entries.			1 to	3 of 3				i< ≤ Page 1 e	of 1 >

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.





corner.

If the Rubric assessment is NOT shared with students, the Reassess This Learner button appears in the upper right

Edit Rubric Assessment	×
Assessment*	
Nurtition for Behavioral Health Close Read	Rubric- Spring 2024 👻
Description	
	h
Course*	AssessmentType*
NUTR 119 Medical Nutrition Therapy *	Summative *
Cohort*	Phase*
Cohort 2026 -	Year 1 -
Block*	
Spring -	
Rubric*	
Nutrition Literacy Rubric Assessment	*
Assessment Method*	
Student Evaluation	v
Share Assessed Rubric with Student(s)	
Student(s)*	
Doe , John x Smith , Jane x	•
	Const. B. Const.
	Cancel 🗎 Save

- 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.



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Reassess the learner, add comments, then Save & Submit.

Student	Doe, John Complete	Level 4		Reassess this Le
student	Criteria Net Observed Net Observed Net Observed Id indicates the selected evaluation on display and tatus of the evaluation.	Confirmation Are you sure you want to reassess this learner? Doing this will delete previous selections. Mat Cancel Proceed	rmat (all sections	Level 1 -Demonstrates limited understanding of proposal format (ort all sections included, incerrect order)

8c. Complete Checklist Assessments in the Competency Website (All Program Types Except DPDs)

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

≡ ACEND @ □	ashboard 🖵 Rotations & Assessment	s 💿 🗢 Settings		ACEND CP Demo Program 🔹 🥜 😃 🌑
Rotations	<u>Ω</u> Students	Assessments - Learner, Amanda		Clinical Hours Tracking Add Rubric Assessment Refresh
Search Rotations by Name	Search by Student			
Diabetes Hospital (01/05/2021 - 05/24/2021)		Rubric Checklist		
	All Students	Name	Status	■ Action ■
Diabetes Hospital (08/23/2021 - 12/21/2024)	Learner, Amanda	WIC Presentation Checklist	(0/5 Pending)	Submit
Montgomery County WIC (01/02/2024 - 03/15/2024)	Student, Beth	View 20 ventries.	1 to 1 of 1	(< < Pagelofl > >)





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.

Checklist - WIC Presentation Checklist (Learner, Amanda)
Purpose communicated clearly * yes O no
Organized and easy to follow * * yes no
Presenter exhibited a good understanding of the topic " yes no
Presenter was well prepared * ves no
Presenter spoke clearly and effectively * O yes 🖲 no
Presentation was done in a way that engaged the audience *
Narratives for Improvements Vour presentation was well organized and contained good information. Work on maintaining eye contact and engaging your audience
Submit Cancel





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8d. 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.

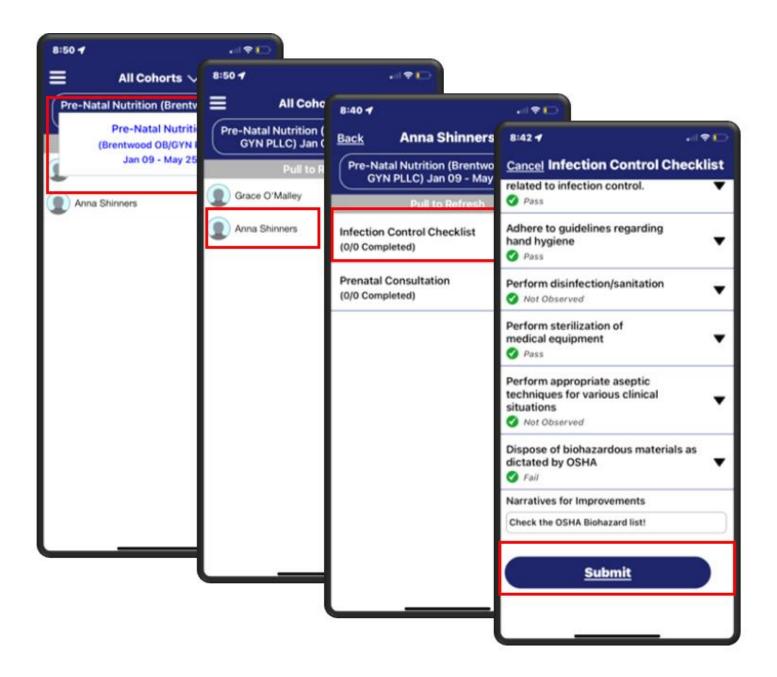


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Remember Me





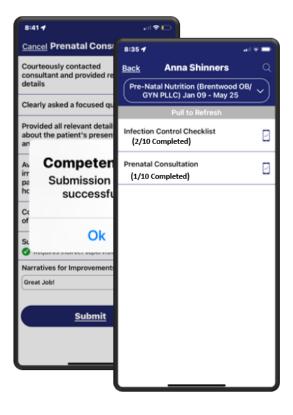
To complete a checklist, select the rotation you are assigned to. Then select the student you are precepting. An evaluation list will population. Select the evaluation you need to complete. Ensure you answer every required question. Then click **Submit.**







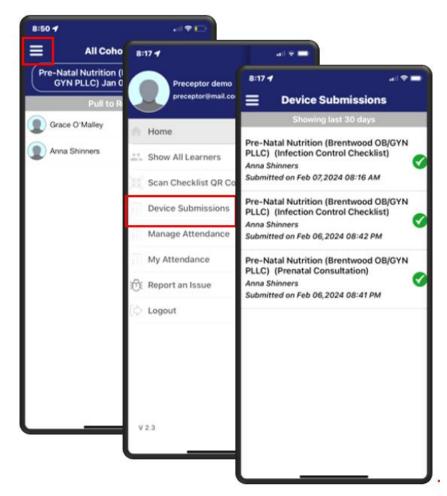
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Competency provides an automatic notification that your checklist has been successfully completed and submitted.

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.

≡ 📰 ACEND 🛛 👁	Dashboard 🖵 Rotations & Assessment	ACEND CP Demo F	Program 🔹 🖌 🚨
Rotations	ی Students	L. Assessments - All Students Hours Tracking	
Search Botations by Name Diabetes Hospital (01/02/2024 -	Search by Student	Rubric Checklist	4.
03/15/2024)	All Students	Name Course AssessmentT Rubric Method Progress Status	s Action
Montgomery County WIC (01/02/2024 - 03/15/2024)	Learner, Amanda	Geriatric Diabetes Clinical Rotations Summative Geriatric Diabet Student Evaluati 27 View	C 0
Princeton EDU (01/02/2024 - 03/15/2024)	Student, Beth	Nutrition Care Process View 20 > entries. 1 to 1 of 1	<pre>Page 1 of 1 → →</pre>

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.

Hours Tracking - /	All Students					×
Date	≡ Student Name	Hours:Minutes	Comments	≡ Status	= Action	=
01/19/2024	Amanda Learner	3:15	Click to enter comments	Pending for approval	Approve Reject	1
01/19/2024	Amanda Learner	5:00	Click to enter comments	Pending for approval	Approve Reject	-
			1 to 2 of 2		< < Page 1 of	f1 > >





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.

≡ 📰 ACEND 🐽 D	ashboard 📮 Rotations & Assessments 🔹 Settings		ACEND CP De	mo Program 🔹 🖌 🖉
Organization and Users	SEL/SP Hours Report			🗲 Back 📥 Download
Curriculum	Filters			
	Saved Filters			
Assessments	Select	•		
Rotations	Rotation Overview	Cohort	Phase	
Peports	WIC Rotation	* Cohort 2024	• Year 3	•
Checklist Report	Block	Student		
Rubric Assessments Report	Rotation 3 (01/02/2024 - 03/15/2024)	• All	- Apply Save	
Assessments Report				
Hours Tracking Report	Student Name	≡ On-Site Hours Total ≡ Virtual H	Hours total 🛛 🗧 🛛 Combined Total	=
	🗆 😑 Amanda Learner	48 0	48	
	Date	≡ Hours	On-Site/Virtual	=
	09/13/2023	3.00	On-Site	
	01/02/2024	5.00	On-Site	
	01/09/2024	5.00	On-Site	
l	01/16/2024	2.00	On-Site	

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

E 📰 ACEND 🛛 🕫 🛛	ashboard 📮 Rotations & Assessments 💠 Settings		ACEND CP Demo	Program 🔹 🥐 🗘
Organization and Users	SEL/SP Hours Report			🗲 Back 📥 Downloa
Curriculum	Filters			
Competencies	Saved Filters			
Assessments	Select	•		
Rotations	Rotation Overview	Cohort	Phase	
Reports	WIC Rotation	• Cohort 2024	• Year 3	-
Checklist Report	Block	Student		
Rubric Assessments Report	Rotation 3 (01/02/2024 - 03/15/2024)	- All	- Apply Save	
Assessments Report				
Hours Tracking Report	Student Name	≡ On-Site Hours Total ≡ Virtua	l Hours total 🛛 🗧 Combined Total	
	🗆 😑 Amanda Learner	48 0	48	
	Date	≡ Hours	= On-Site/Virtual	=
	09/13/2023	3.00	On-Site	
	01/02/2024	5.00	On-Site	
	01/09/2024	5.00	On-Site	
	01/16/2024	2.00	On-Site	



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.

Competency

• Click Apply to apply these parameters to the Checklist Report.

≡ 📰 ACEND 🔹 ▫	ashboard 🖵 Rotations & Assessments 🧿 Settings 🕹 CEDID CP Demo Program 🔹 🤌 🗘	
Organization and Users	Filters	
Curriculum	Saved Filters	
Competencies	Select •	
Assessments	Rotation Overview Cohort Phase	
Rotations	Disorded Eating	•
Reports	Block Student	
Checklist Report	Rotation 2 (10/16/2023 - 12/21/2023) • All • Apply Save	
Rubric Assessments Report		
Assessments Report	Competency	۵
Hours Tracking Report	Student Submissions	
	□ Student Name ? ≡ Cohort ≡ Rotation Overview ≡ Checklist ≡ Total Re ≡ Total Student Name ?	Su ≡
	Image: Section of the section of th	
	Clerkship I Checklist I Submitted Date I Evaluator I Grade I GPS Locat I Delete	te
	Disorded Eating Presentation Checklist 02/10/2024 6:08 PM ACEND, EMS Director 66.67 Q	
	Disorded Eating Presentation Checklist 02/10/2024 6:08 PM ACEND, EMS Director 50 Q	

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

Organization and Users	Checklist Report Checklist Report	& Downl
Curriculum	Filters	
Competencies	1100.0	
Assessments	Competency	
Rotations	Student Submissions	
Reports Checklist Report	Image: Stradgert Name Image: Campus Key Image: Cam	Total Su ≡ 3
Rubric Assessments Report	Clerkship II Checklist II Submitted Date II Evaluator II Score II Grade II GPS Locat	Delete
Assessments Report	Diabetes Hospital Rotation Type II Diabetes Presentation Ch 02/10/2024 7:38 PM ACEND, EMS Director 66.67 9	0
Hours Tracking Report	Diabetes Hospital Rotation Type II Diabetes Presentation Ch 02/10/2024 6:25 PM ACEND, EMS Director 83.33 P Diabetes Hospital Rotation Type II Diabetes Presentation Ch 02/10/2024 6:25 PM ACEND, EMS Director 100 P	0
	Diabetes Hospital Rotation Type II Diabetes Presentation Ch 02/10/2024 6:25 PM ACEND, EMS Director 100 9	0
and a second second	1101013	- i flota
and a second address	100.3.0.1 20.2.2 20.2.2.2 20.2.2.2 20.2.2.2 20.2.2.2 20.2.2.2 20.2.2.2 20.2.2.2 20.2.2.2 20.2.2.2 20.2.2.2 20.2 20.2	a lofi





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.
 - o 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.

E 📰 ACEND 🐽 Da	shboard 📮 Rotations & Assessments 🔹 Settings			ACEND CP Demo Program 🔹 🖌 🖉 🌑
Organization and Users	Filters			
Curriculum	Saved Filters			
	Select			
Research Assessments	Cohort	Phase	Block	Course
Checklist	All	All	All	All •
Rubric	Rubric	Assessments	Competency	Conditions or Disease States
Rotations	All	Select Assessments	Select Competency -	Select -
(Reports	Populations and Diverse Culture	Student	Faculty	
	Select •	All	All •	
	☐ Include Narratives ☑ Show raw score	Show Report By Criteria Competency / Conditions or Disease States / Populations and Diverse Culture /	Apply Save	

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.

Organization and Users	Rubric Assessments R	eport							🗲 Bac
Curriculum	Care and Process Chart	ting Cos	ag 2024	-					▲ Download
Competencies	Care and Process Chart	ung spr	mg 2024						2 Download
	Student		Preceptor Name	=	Goals are measurable to ≡	Nutrition Assessment in =	Nutrition Assessment in =	Nutrition Assessment in =	Nutrition Assessme
Assessments	Learner, Amanda		ACEND, EMS Director		2	3	3	4	3
Checklist	Student, Beth		ACEND, EMS Director		4	4	3	4	3
Checking						1 to 2 of 2			C Page 1 of 1 > >
Rubric									
Rotations				_					
	Disordered Eating Nutr	ition Ca	re Process and Charting	Fall 20	023				📥 Download
Reports	(and the second								
	Student		Preceptor Name	-	Goals are measurable to ≡	Nutrition Assessment in	Nutrition Assessment in	Nutrition Assessment in	Nutrition Assessmer
	Learner, Amanda		ACEND, EMS Director		3	3	2	4	3
	Student, Beth		ACEND, EMS Director		3	3	3	3	3
						1 to 2 of 2			Page 1 of 1 > >





- The Rubric Report is now avaiable 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 from the website. The report provides a comprehensive list of all hours completed by students.

Click Settings > Reports > Hours Tracking Report

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

E ACEND 🐽 Da	ishboard 📮 Rotations & Assessments 🔹 Settings		ACEND CP Demo P	rogram 🔹 🖌 🕰 🌑
Organization and Users	SEL/SP Hours Report			🗲 Back 📥 Download
Curriculum	Filters			
Competencies	Saved Filters			
Assessments	Select	•		
Rotations	Rotation Overview	Cohort	Phase	
Preports	WIC Rotation	▼ Cohort 2024	• Year 3	•
Checklist Report	Block	Student		
Rubric Assessments Report	Rotation 3 (01/02/2024 - 03/15/2024)	- All	- Apply Save	
Assessments Report				
Hours Tracking Report	Student Name	🗧 🛛 On-Site Hours Total 🛛 🗧 🔤 Virtual Hou	urs total 🛛 🗧 🛛 Combined Total	=
	Amanda Learner	48 0	48	
	Date	≡ Hours	= On-Site/Virtual	
	09/13/2023	3.00	On-Site	
	01/02/2024	5.00	On-Site	
	01/09/2024	5.00	On-Site	
	01/16/2024	2.00	On-Site	

📰 ACEND 🛛 🕫	ashboard 🖵 Rotations & Assessments 🧿 Settings		ACEND	CP Demo Program 🔹 🥜 🔱
Organization and Users	SEL/SP Hours Report			🗲 Back 📥 Dow
Curriculum	Filters			
Competencies	Saved Filters			
Assessments	Select	•		
Rotations	Rotation Overview	Cohort	Phase	
Reports	WIC Rotation	Cohort 2024	• Year 3	
Checklist Report	Block	Student		
Rubric Assessments Report	Rotation 3 (01/02/2024 - 03/15/2024)	- All	 Apply Save 	
Assessments Report				
Hours Tracking Report	Student Name	= On-Site Hours Total =	Virtual Hours total 🛛 🗧 🕸 Combined Total	
	Amanda Learner	48 (48	
	Date	≡ Hours	On-Site/Virtual	
	09/13/2023	3.00	On-Site	
	01/02/2024	5.00	On-Site	
	01/09/2024	5.00	On-Site	
	01/16/2024	2.00	On-Site	

- Approved hours are now dispalyed.
- Click the + next to each student 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.

Competency

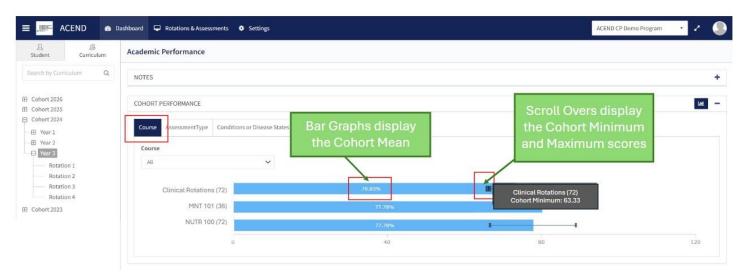
11a. Initial Navigation

ACEND 🐽	Dashboard 🖵 Rotations & Assessments 🗢 Settings	ACEND CP Demo Program 🔹 🧭 🧕
요 요 Student Curriculum	Academic Performance	
Search by Curriculum Q	NOTES	+
 	COHORT PERFORMANCE	•
□ Cohort 2024 □ ① Year 1	Course AssessmentType Conditions or Disease States Populations & Diverse Cultures Competency	
ear 3	0 40 No data available 80	120
Rotation 1 Rotation 2 Rotation 3	N NU DU	140
Rotation 4	STUDENT PERFORMANCE	At Risk All 🗸 🖵
	No data available	
	View 20 ✓ entries. 0 to 0 of 0	15 5 Page 0 of 0 3 3)

- 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.

Learner		≡	MNT 100	
Learner , Amanda	77.78		72.22	
Student , Beth BStu001	63.89		83.33	

2. Individual 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 student dashboard view.

11c. Assessment Types Tab

	Dashboard 📮 Rotations & Assessn	nents 🛛 Settings					ACEND CP Demo Program	<u> </u>
Ludent Curriculum	Academic Performance							
arch by Curriculum Q	NOTES							
ohort 2026 ohort 2025	COHORT PERFORMANCE							Lat.
ohort 2024 Year 1	Course AssessmentType	Conditions or Disease States	Populations & Diverse Cultures	Competency				
Vear 2 Vear 3	AssessmentType			Courses		Assessments		
Rotation 1 Rotation 2	A8	~		All	~	AB	~	
Rotation 3 Rotation 4	Formative	77.38%	· ·	Nutrition Care & Process Rubric	75	s - 1		
ohort 2023	Summative	. in and	-	WIC Rotation Checklist		0%		
		0 40	80	Juvenile Diabetes Presentation		100%		

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

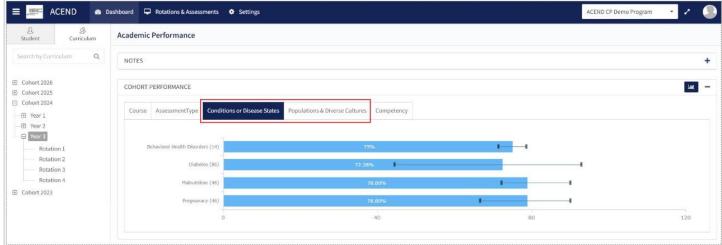




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11d. Conditions or Disease States / Populations & Diverse Cultures

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

CRDN 2 (138) 67.39% CRDN 3 (30) 58.33% CRDN 4 (16) 71.88% KRDN 1 (96) 17.05% KRDN 2 (174) 170.74% 0 40 80 120 CBN 2.5 (20) 76.25% CBN 2.7 (10) 60%	rse	AssessmentType	Conditions or Disease S	tates Population	ns & Diverse Cultures	Competency			
CRDN 3 (30) 58.33% GRDN 2.10 (2) 75% CRDN 4 (16) 71.88% GRDN 2.2 (20) 60% KRDN 1 (96) 17.05% GRDN 2.3 (22) 72.73% KRDN 2 (174) 100.74% GRDN 2.3 (22) 72.73% O 40 80 120 GRDN 2.6 (18) CRDN 2.6 (18) 99.72% 99.72%		_			L.				
CRDN 4 (16) 71.88% CRDN 2.2 (20) 601 KRDN 1 (96) 172.00% CRDN 2.3 (22) 72.73% KRDN 2 (174) 76.74% CRDN 2.4 (14) 61.64% 0 40 80 120 CRDN 2.5 (20) 76.25% 1		CRDN :	2 (138)	7.39%			CRDN 2.1 (26)	72.12%	I
KRDN 1 (96) F72,03% CRDN 2.3 (22) 72,73% KRDN 2 (174) 76,74% CRDN 2.4 (14) 61,64% 0 40 80 120 CRDN 2.6 (18) 59,72% 1		CRDN	¥ 3 (30)	33%			CRDN 2.10 (2)	75%	
KRON 2 (174) 70,74% CRDN 2.4 (14) 61,64% 0 40 80 120 CRDN 2.5 (20) 76.25% CRDN 2.6 (18)		CRDN	4 (16)	71.88%	1 1		CRDN 2.2 (20)	609	
0 40 80 120 CRDN 2.5 (20) 76.25%		KRDN	1 (96)	F7.08%			CRDN 2.3 (22)	72.73%	11
CRDN 2.6 (18)		KRDN :	2 (174)	1 78.74%			CRDN 2.4 (14)	69-64%	
			0	40	80	120	CRDN 2.5 (20)	76.25%	1 1
CRDN 2.7 (10) 60%							CRDN 2.6 (18)	I 59.72%	
							CRDN 2.7 (10)	601	- 1
							0	40	80

- 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.