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Competency Evaluations Workflow (Single Visit)

Start of the Day

*** Competency Evaluation Forms can be manually created by either the Student or the Faculty member. The steps to generate the form for both roles are the same.*

STUDENT/FACULTY

1. From the patient's appointment detail screen, click **Request Competency Evaluation** button.
2. **Student** is defaulted to appointment's Primary Provider, change if necessary.
3. Choose **New evaluation**.
4. **Select procedure(s)** for the evaluation.
5. Enter **evaluator(s)** or choose None. **None** will allow any evaluator to fill the form.
6. **Pick a form** to use.
7. Click **Create.**

Throughout the Day

STUDENT

1. Find Competency Form under **Academic > Student Evaluations > Pending** tab.
    a. Competency Forms are marked with a ⚑.
2. **Start** self-evaluation.
3. **Submit** when completed.
    a. Completed self-evaluations will move to the **Completed** tab.

FACULTY

4. Find pending evaluations through the **Evaluations widget** or **Academic > Faculty Evaluations**.
    a. Evaluations assigned to you will be in **My Pending Evaluations** while unassigned evaluations will be in location's **Pending Evaluations** list.
    b. Competency Forms are marked with a ⚑.
5. **Start** student evaluation.
6. Complete evaluation and **Submit**.

End of the Day

STUDENT

7. Check if all evaluations have been completed by faculty.
    a. Completed will have a green check mark beside evaluator mask.
8. **View Results** to see evaluation.
9. If faculty has not completed their evaluation by the end of the day, locate the evaluation and **Remind Faculty**.

FACULTY

10. Receive reminder notification from **Faculty Assist App** in your phone for pending evaluation.
11. Complete or resume evaluation in app or from a workstation.

NOTE:

i. *Competency Forms can be created **<u>without an appointment</u>** from **Academic > Student/Faculty Evaluations > Create New Evaluation > Competency**.*