

Competency Evaluations Workflow (Multi Visit)

During First Visit


****** *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**.

End of First Visit

STUDENT

1. Find Competency Form under **Academic > Student Evaluations > Pending** tab.
 - a. Competency Forms are marked with a .
2. **Start** self-evaluation.
3. Complete self-evaluation only for section(s) related to today's appointment.
4. **Submit** when finished and **Submit as multi-visit** in the next warning screen.
 - a. Form will automatically move to **Completed** tab.

FACULTY

5. 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 .
6. **Start** student evaluation only for section(s) related to today's appointment.
7. **Submit** when finished.
8. Click **OK** in the confirmation window and **Submit as multi-visit** in the warning screen.
 - a. Form will automatically move to **Completed Evaluations** sections.

NOTE:

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

continued on the next page 

During Following Visit

STUDENT

9. From the patient's appointment detail screen, click **Request Competency Evaluation** button.
10. **Student** is defaulted to appointment's Primary Provider, change if needed.
11. Choose **Continue a multi-visit evaluation** option and select existing evaluation from the dropdown.
12. Click **Create**.
13. Find form in **Academic > Student Evaluations > Pending** tab.
14. **Start** self-evaluation. Previous visit answers will be pre-filled.
15. **Submit** when finished.

FACULTY

16. Find pending evaluations through the **Evaluations widget** or **Academic > Faculty Evaluations**.
 - a. Click the arrows to the left to review procedures associated with the evaluation, if any.
17. **Start** student evaluation. Previous visit answers will be pre-filled.
18. **Submit** when finished.
19. Click **OK** in the confirmation window.
 - a. Form will automatically move to **Completed Evaluation** sections.

End of Following Visit

STUDENT

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

FACULTY

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

NOTE:

- ii. *There will be multiple records of the same Competency Evaluation form, marked as Completed, based on the number of times the evaluation was continued.*