MedSIS: Competence Committee/Portfolio Review Dashboard for Family Medicine

Audience: FM Education Associates

Agenda

- Setting up a Competence Committee Review Template
  - How to create Review Periods
  - How to create Requirements
  - How to create a competence committee review template
  - How to assign a competence committee review template to a trainee (EAs)
  - How to access a trainee's Review Dashboard (EAs)
  - How to customize a trainee's competence committee review (EAs)

- Navigating the Review Dashboard tab
  - How to facilitate a review using the Review Dashboard

Role of the Central Senior EA of Assessment

- To create competence committee review templates

Role of the Site EAs

- To assign competence committee review templates to residents' dashboards

*The steps outlined in this presentation must be completed IN ORDER for residents to have full access and functionality to their review dashboards

What is the Competence Committee Review Dashboard?

- The intention of the dashboard is to:
  - Streamline competence committee processes
  - Facilitate committee meetings
  - House/centralize all relevant committee meeting documentation
  - Improve transparency of what is reviewed as part of decision making processes
  - Alleviate some of the current prep work of emailing files to reviewers/cc members

What is the Competence Committee Review Dashboard?

Setting up a Competence Committee Review Template

*This step is the responsibility of the Central Senior EA of Assessment

How to create a Review Period

- Review Periods indicate the period of time the committee is reviewing for the trainees (ie. Jul 1 – Sep 30, 2020).

- Each program will have different review periods and will only have access to their own review periods.

*This step is the responsibility of the Central Senior EA of Assessment

How to create a Review Period

- Assign a name to the review period. Suggest simply using the dates of the period. Over time, your list of review periods will grow so you will want to keep them organized

*This step is the responsibility of the Central Senior EA of Assessment

How to create Requirements

- Requirements are the 'steps' or the 'required items to be reviewed' as part of a competence committee review.

- All applicable requirements should be identified here.

- Requirements can be modified but changes will be reflected in all reviews where the requirement was used.

*This step is the responsibility of the Central Senior EA of Assessment

How to create Requirements

- Assign a name to the requirement. Choose something clear and descriptive (keep your audience in mind).

- Select your program.

- Each program will have different requirements and will only have access to their own requirements.

*This step is the responsibility of the Central Senior EA of Assessment

How to create a Competence Committee Review Template

- Review templates are created under the Program.

- Programs can have as many review templates as they wish.

- Programs may require different templates based on the level of the trainee.

*This step is the responsibility of the Central Senior EA of Assessment

How to create a Competence Committee Review Template

- All templates are housed under the 'Requirement Checklist' tab.

*This step is the responsibility of the Central Senior EA of Assessment

How to create a Competence Committee Review Template

- Assign a name to the review template that is representative of the review (ie. 'TTD Review' or 'Core – Review 1')
- Assign the review period that this particular review template is for.

*This step is the responsibility of the Central Senior EA of Assessment
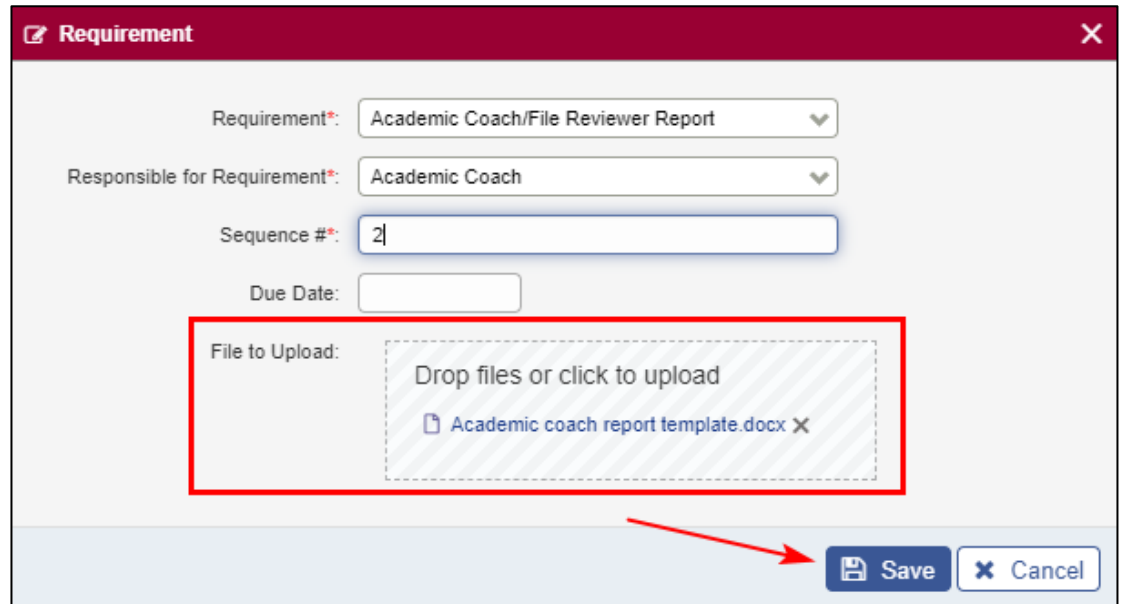
How to create a Competence Committee Review Template

- As you create more templates, they will be reflected in the Requirement Checklist tab.
- It's important to name the reviews something that will keep you organized.

How to create a Competence Committee Review Template

- Within the review template, you will indicate the 'steps' or 'required items to be reviewed'.

- Each review template can have as many or few steps as needed.

*This step is the responsibility of the Central Senior EA of Assessment

How to create a Competence Committee Review Template

- Select a requirement from the list you originally create and assign who is responsible for that step.
- Programs have the option of assigning a template document to the step. The template will be accessible to the user who is responsible for it

How to create a Competence Committee Review Template

- Once all the steps are assigned, the template will look something like this and can now be assigned to the applicable trainees

How to assign a Competence Committee Review Template to a trainee

- Click on the review and go to 'Assign'
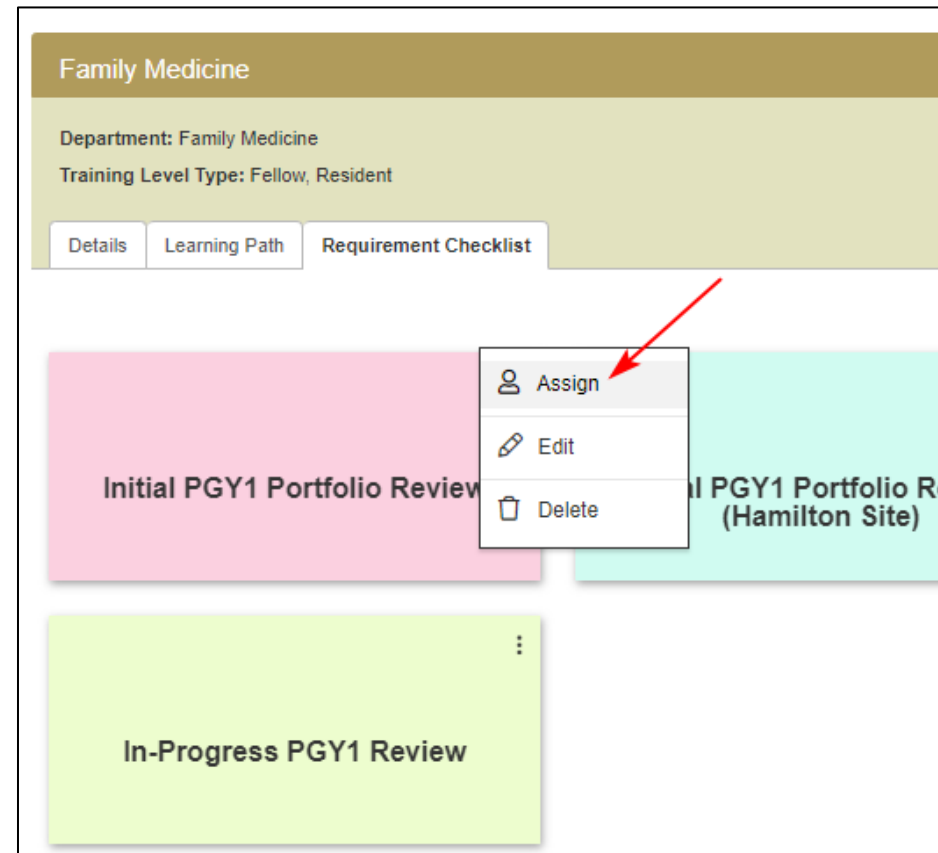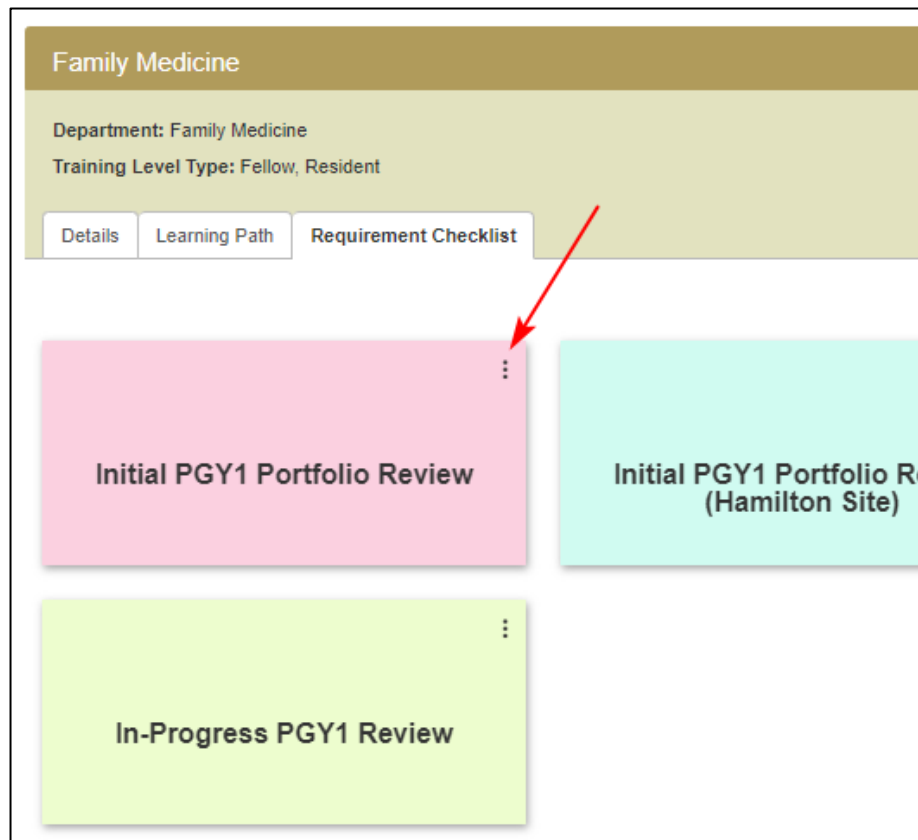
*This step is the responsibility of the Site EA

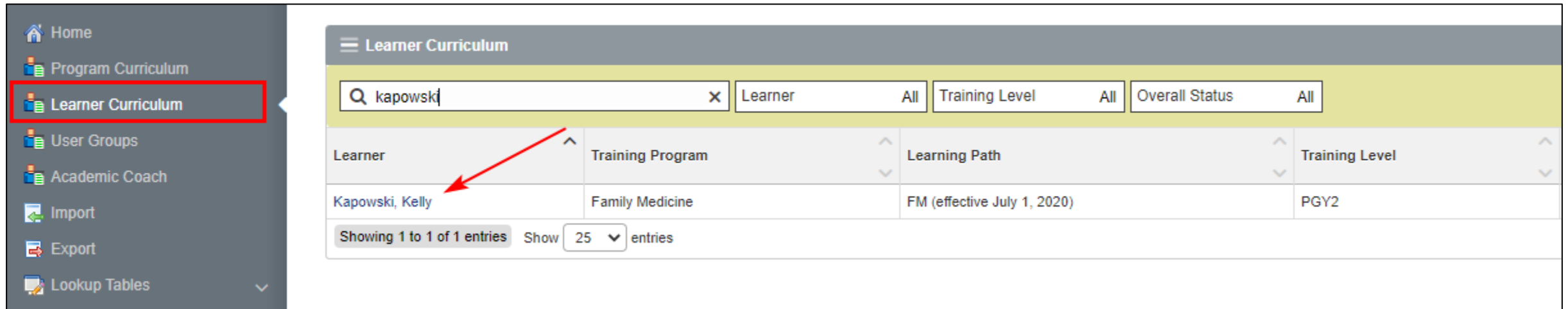# How to assign a Competence Committee Review Template to a trainee

- A list of all trainees in the program will appear. Bulk assign the template to only those trainees it's applicable to (ie. only TTD trainees)

- Assigning a template to trainees is simply copying the template into the trainee's Review Dashboard. If changes are made to the template, the changes will only apply to any NEW trainees you assign the template to.
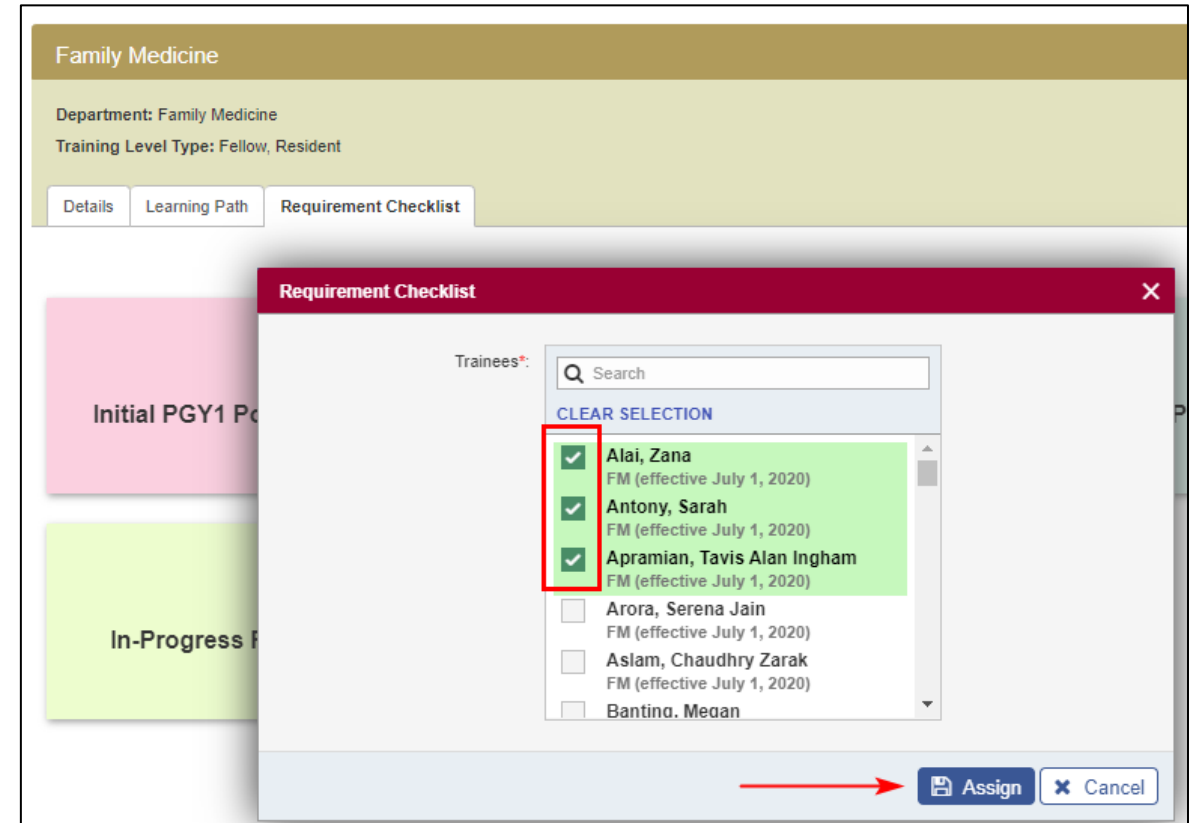
*This step is the responsibility of the Site EA

How to access a trainee's Review Dashboard

- Now that the review template is assigned to the trainee, you will find the template in the trainee's Review Dashboard

How to access a trainee's Review Dashboard

How to customize a trainee's Competence Committee Review

- For trainees who may have more, fewer or different requirements than other trainees, requirements can be added to an individual trainee's review dashboard (ie. remediation documentation).

- For trainees who may have more or different reviews than other trainees, reviews can be added to an individual trainee's review dashboard. The review template needs to be created before it can be applied to an individual trainee.

*If your resident has an EEP or Remediation plan, please contact your Central Senior EA of Assessment. EEP and Remediation plans cannot be uploaded to the dashboard in their current state due to confidentiality reasons

How to customize a trainee's Competence Committee Review

How to customize a trainee's Competence Committee Review

*If your resident has an EEP or Remediation plan, please contact your Central Senior EA of Assessment. EEP and Remediation plans cannot be uploaded to the dashboard in their current state due to confidentiality reasons

Navigating the Review Dashboard - Access

- Trainees can view all files on the dashboard but can only upload/delete/modify the files that are assigned to their role

Navigating the Review Dashboard - Access

- PDs (Site Directors), EAs, Academic Coaches and Competence Committee members have full access to modify the dashboard

- This includes modifying files, customizing the review by adding or removing requirements, modifying the meeting details at the bottom of the review

Navigating the Review Dashboard – View/Download Files

Navigating the Review Dashboard – Completing Template Files

- Once the user has downloaded the template file, they will fill it out and save it to their computer desktop.

- Once the file is saved, it can be uploaded back to the Review Dashboard

Navigating the Review Dashboard – Upload Completed Files

Navigating the Review Dashboard – Meeting Dates and Overall Status