

MedSIS: Competence Committee/Portfolio Review Dashboard

Audience: Program Administrators

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
 - How to access a trainee's Review Dashboard
 - How to customize a trainee's competence committee review
- Navigating the Review Dashboard tab
 - How to facilitate a review using the Review Dashboard

Role of the Program Administrator

- To create competence committee review templates and assign them to trainees
- The steps outlined in this presentation need to be done in order for your trainees to have a competence committee review dashboard

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?

Details EPAs Supporting Documentation Reflection Documentation Assessments Program Evaluations Events Activities Summary Report **Review Dashboard**

Initial PGY1 Portfolio Review Progressing as expected on schedule Total: 4

Search: [+ Add Requirement](#)

Sequence #	Requirement	Responsible for Requirement	Template Files	Files	Due Date	Step Complete	Last Updated
1	1) Learner Summary Report	Administrator		Report_Armanious_Miriam.pdf		<input checked="" type="checkbox"/>	18-Sep-2020
2	2) Resident Reflection	Trainee	Resident Reflection Template.pdf	Reflection_Sept2020.pdf		<input checked="" type="checkbox"/>	23-Sep-2020
3	3) Portfolio Review Form	Academic Coach	PGY-1 Initial Portfolio Review Form.pdf	PGY-1 Initial Portfolio Review Form - Dr Armanious.pdf		<input checked="" type="checkbox"/>	28-Sep-2020
4	4) Competence Committee Resident Report	Competency Committee	Competence Committee Resident Report Template.pdf	Competence Committee Resident Report - Miriam Armanious - Oct 2020.pdf		<input checked="" type="checkbox"/>	09-Oct-2020

Showing 1 to 4 of 4 entries Show 25 entries [First](#) [Previous](#) [1](#) [Next](#) [Last](#)

Meeting Date:

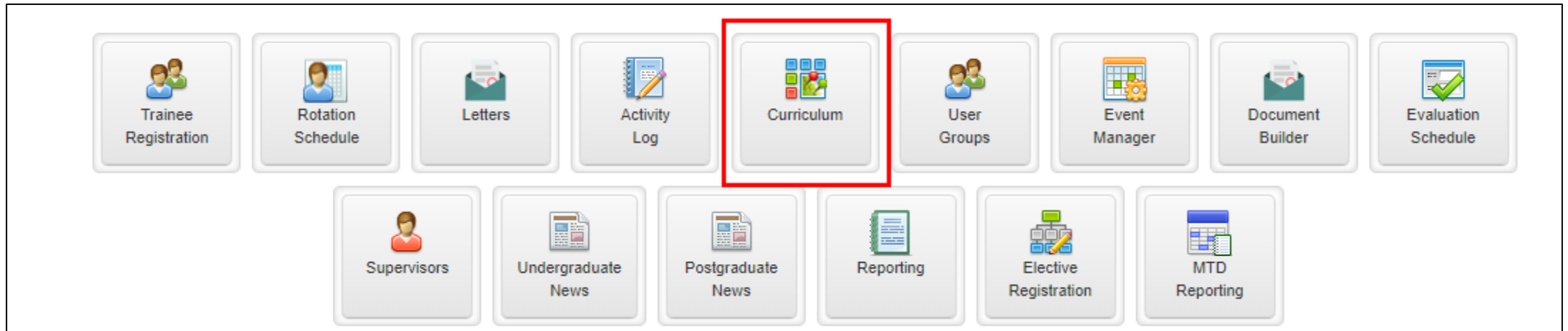
Date Decision Ratified:

Overall Status:

Comments:

[History](#) Last modified on 29-Oct-2020, 14:32 by Michelle Salfarlie. [Save](#) [Delete](#)

Setting up a Competence Committee Review Template



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.

The screenshot shows a web application interface for managing review periods. The top navigation bar includes tabs for Requirement, Promotion, Meeting Outcome, Meeting Purpose, and Review Period (highlighted with a red box). The left sidebar contains navigation items: Home, Program Curriculum, Learner Curriculum, User Groups, Academic Coach, Lookup Tables (highlighted with a red box), and Requirement Checklist (highlighted with a red box). The main content area displays a table titled 'Review Period' with a search bar and a '+ Add New' button (indicated by a red arrow). The table has columns for Name, Start Date, End Date, Program, and Status. Two entries are shown:

Name	Start Date	End Date	Program	Status
Jul 1 - Aug 31, 2020	01-Jul-2020	31-Aug-2020	Family Medicine	Active
May 1 - Aug 31, 2020	01-May-2020	31-Aug-2020	Family Medicine	Active

At the bottom of the table, it shows 'Showing 1 to 2 of 2 entries' and a pagination control with buttons for First, Previous, 1, Next, and Last.

How to create a Review Period

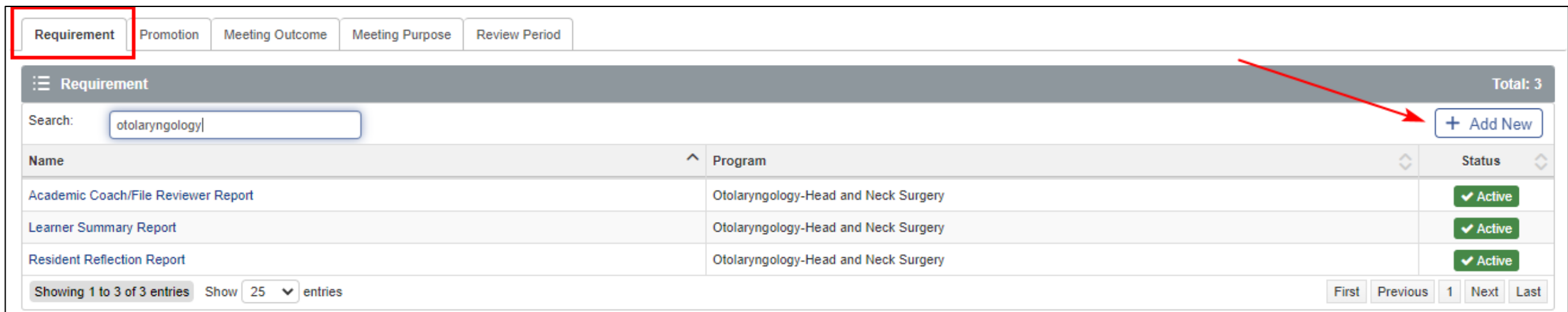
- Assign a name to the review period. Suggest simply using the dates of the period. Over time, your list of review periods will grow so you will want to keep them organized

The screenshot shows a software interface with a top navigation bar containing tabs: Requirement, Promotion, Meeting Outcome, Meeting Purpose, and Review Period. The 'Review Period' tab is highlighted with a red rectangular box. Below the tabs is a form titled 'Add Review Period'. The form includes the following fields and controls:

- Name*:** A text input field containing 'October 1 - December 31, 2020'.
- Start Date*:** A date input field containing '01-Oct-2020'.
- End Date*:** A date input field containing '31-Dec-2020'.
- Program*:** A dropdown menu with 'Otolaryngology-Head and Neck Surgery' selected.
- Active:** A green toggle switch with a white circle, currently turned on.
- Buttons:** 'Save' (with a floppy disk icon) and 'Cancel' (with an 'X' icon) buttons are located at the bottom right of the form. A red arrow points to the 'Save' button.

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.



The screenshot displays a web application interface for managing requirements. At the top, there are several tabs: 'Requirement', 'Promotion', 'Meeting Outcome', 'Meeting Purpose', and 'Review Period'. The 'Requirement' tab is highlighted with a red box. Below the tabs, there is a search bar with the text 'otolaryngology' and a '+ Add New' button, which is pointed to by a red arrow. The main content area is a table with the following data:

Name	Program	Status
Academic Coach/File Reviewer Report	Otolaryngology-Head and Neck Surgery	Active
Learner Summary Report	Otolaryngology-Head and Neck Surgery	Active
Resident Reflection Report	Otolaryngology-Head and Neck Surgery	Active

At the bottom of the table, there is a pagination control showing 'Showing 1 to 3 of 3 entries' and a 'Show 25 entries' dropdown. On the right side, there are navigation buttons: 'First', 'Previous', '1', 'Next', and 'Last'.

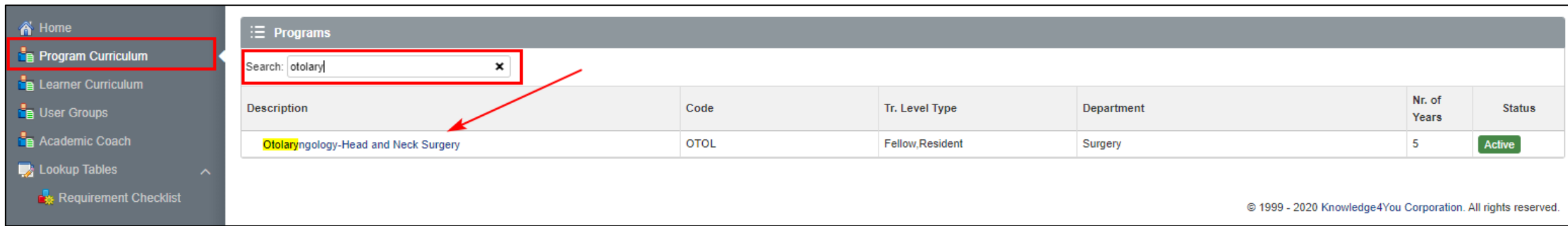
How to create Requirements

- 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.

The screenshot shows a web interface for editing a requirement. At the top, there are five tabs: 'Requirement', 'Promotion', 'Meeting Outcome', 'Meeting Purpose', and 'Review Period'. The 'Requirement' tab is highlighted with a red border. Below the tabs is a header bar with a pencil icon and the text 'Edit Requirement'. The main form area contains two required fields: 'Name*' with the value 'Resident Reflection Report' and 'Program*' with a dropdown menu showing 'Otolaryngology-Head and Neck Surgery'. To the right of these fields is an 'Active' toggle switch, which is currently turned on. At the bottom right of the form, there are three buttons: 'Save' (with a floppy disk icon), 'Delete' (with a trash can icon), and 'Cancel' (with an 'X' icon). A red arrow points to the 'Save' button.

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.



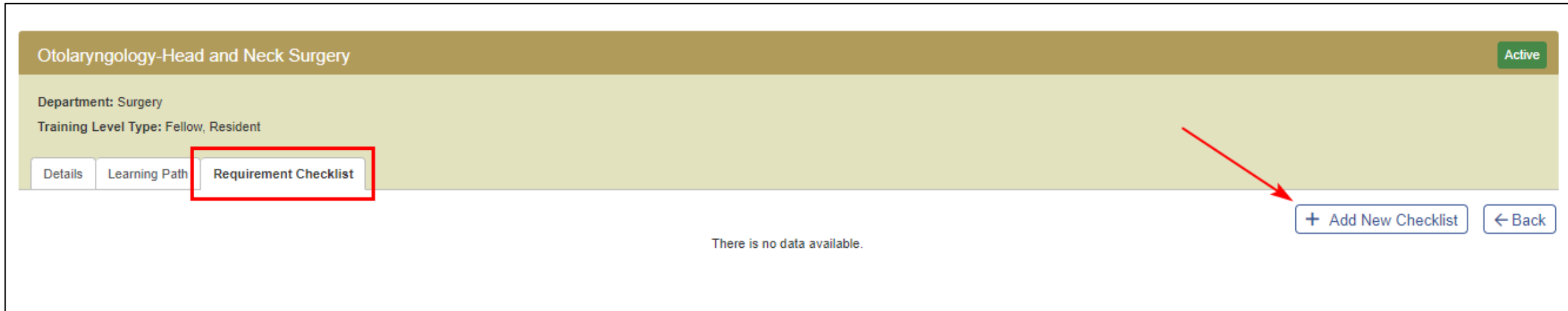
The screenshot displays a software interface with a sidebar on the left and a main content area on the right. The sidebar contains navigation links: Home, Program Curriculum (highlighted with a red box), Learner Curriculum, User Groups, Academic Coach, Lookup Tables, and Requirement Checklist. The main content area is titled 'Programs' and features a search bar containing the text 'otolary'. Below the search bar is a table with the following columns: Description, Code, Tr. Level Type, Department, Nr. of Years, and Status. A red arrow points from the search bar to the first row of the table, which contains the following data: Description: Otolaryngology-Head and Neck Surgery, Code: OTOL, Tr. Level Type: Fellow, Resident, Department: Surgery, Nr. of Years: 5, and Status: Active.

Description	Code	Tr. Level Type	Department	Nr. of Years	Status
Otolaryngology-Head and Neck Surgery	OTOL	Fellow, Resident	Surgery	5	Active

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How to create a Competence Committee Review Template

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



Otolaryngology-Head and Neck Surgery Active

Department: Surgery
Training Level Type: Fellow, Resident

Details Learning Path **Requirement Checklist**

+ Add New Checklist ← Back

There is no data available.

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.

Otolaryngology-Head and Neck Surgery Active

Department: Surgery
Training Level Type: Fellow, Resident

Details Learning Path Requirement Checklist

+ Add New Checklist ← Back

Requirement Checklist ✕

Name*: TTD Review

Sequence #*: 1

Review Period*: October 1 - December 31, 2020 ▼

Save ✕ Cancel

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.

The screenshot shows a web interface for creating a Competence Committee Review Template. The header is a dark olive green bar with the text "Otolaryngology-Head and Neck Surgery" on the left and a green "Active" button on the right. Below the header, the text "Department: Surgery" and "Training Level Type: Fellow, Resident" is displayed. A navigation bar contains three tabs: "Details", "Learning Path", and "Requirement Checklist". On the right side of the page, there are two buttons: "+ Add New Checklist" and "← Back". A red arrow points from the "Requirement Checklist" tab to a purple box labeled "TTD Review".

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.

Otolaryngology-Head and Neck Surgery Active

Department: Surgery
Training Level Type: Fellow, Resident

Details Learning Path **Requirement Checklist**

TTD Review Total: 0

Search:

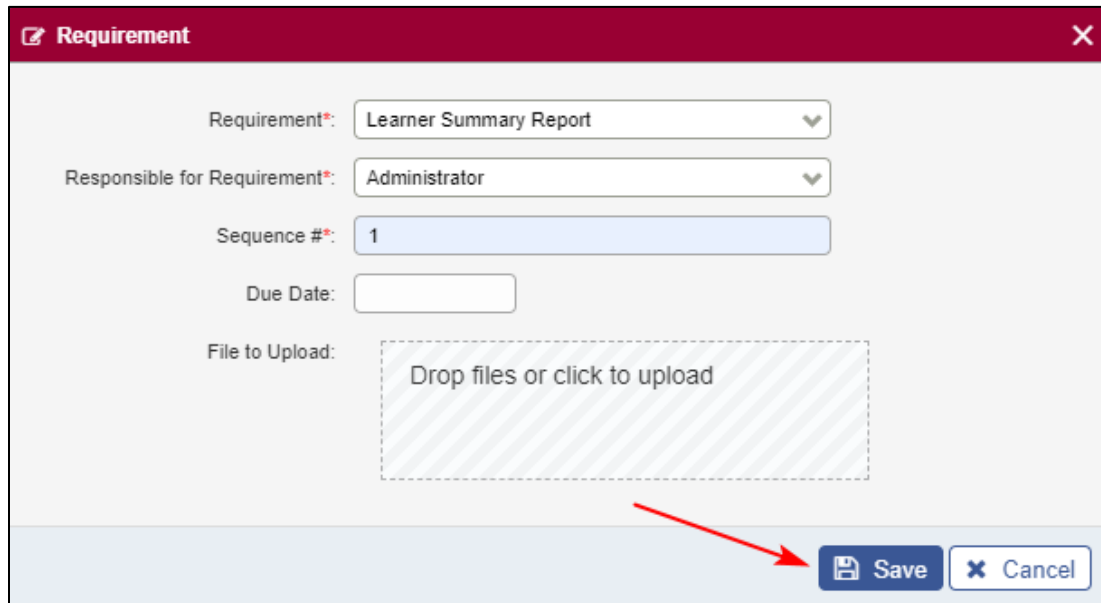
+ Add New Requirement ← Back

Sequence # ^	Requirement	Responsible for Requirement	File to Upload	Due Date
No data available in table				

Showing 0 to 0 of 0 entries Show 25 entries First Previous Next Last

How to create a Competence Committee Review Template

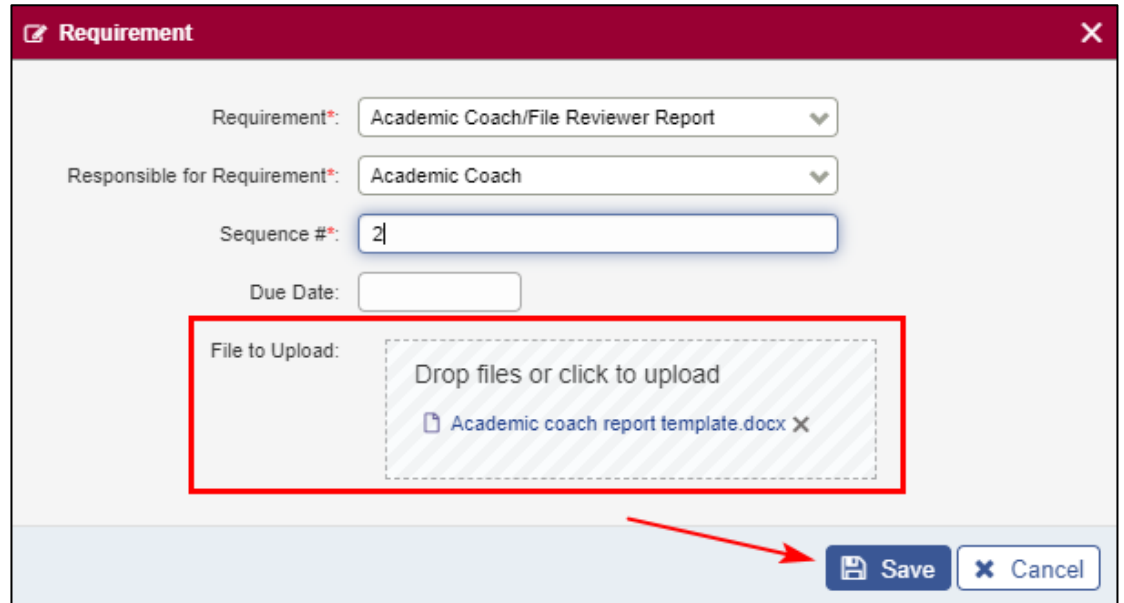
- Select a requirement from the list you originally create and assign who is responsible for that step.
- Programs have the option of assigning a template document to the step. The template will be accessible to the user who is responsible for it



The screenshot shows a 'Requirement' form with the following fields:

- Requirement*: Learner Summary Report
- Responsible for Requirement*: Administrator
- Sequence #: 1
- Due Date: (empty)
- File to Upload: Drop files or click to upload

At the bottom right, there are 'Save' and 'Cancel' buttons. A red arrow points to the 'Save' button.



The screenshot shows the same 'Requirement' form, but with the following changes:

- Requirement*: Academic Coach/File Reviewer Report
- Responsible for Requirement*: Academic Coach
- Sequence #: 2
- Due Date: (empty)
- File to Upload: Drop files or click to upload. Below this, a file named 'Academic coach report template.docx' is listed with a close button (X).

The file upload area is highlighted with a red box. At the bottom right, there are 'Save' and 'Cancel' buttons. A red arrow points to the 'Save' button.

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

Otolaryngology-Head and Neck Surgery Active

Department: Surgery
Training Level Type: Fellow, Resident

Details Learning Path Requirement Checklist

TTD Review Total: 4

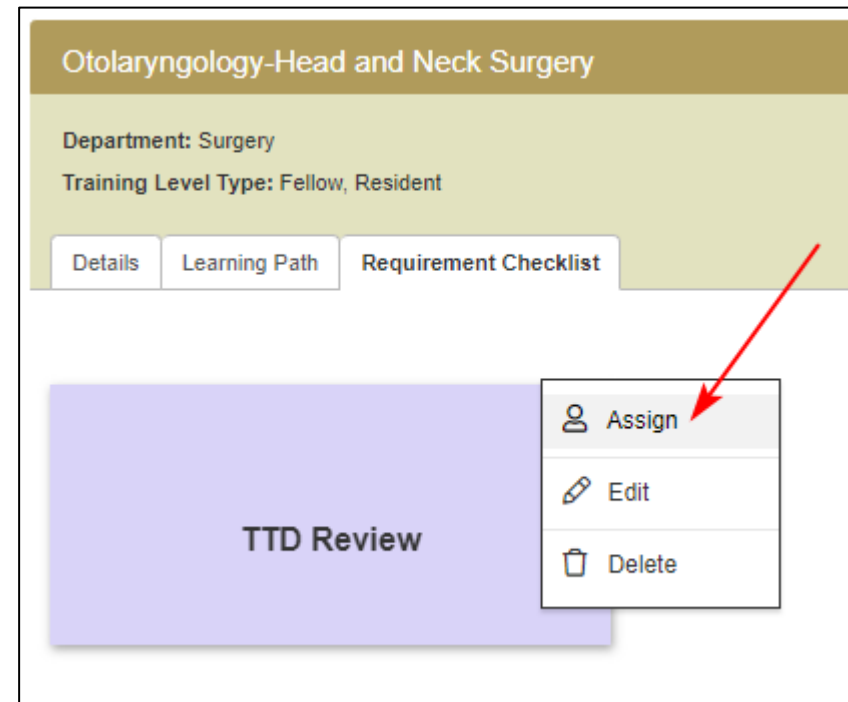
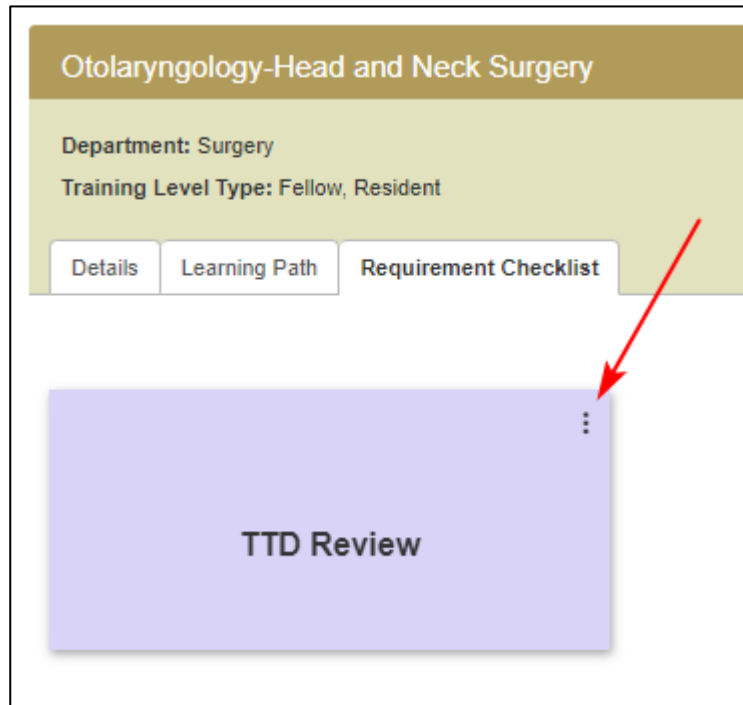
Search: + Add New Requirement ← Back

Sequence # ^	Requirement	Responsible for Requirement	File to Upload	Due Date
1	Learner Summary Report	Administrator		
2	Academic Coach/File Reviewer Report	Academic Coach	Academic coach report template.docx	
3	Resident Reflection Report	Trainee	Resident reflection report template.docx	
4	Competence Committee Report	Competency Committee	Competence Committee Report Template.docx	

Showing 1 to 4 of 4 entries Show 25 entries First Previous 1 Next Last

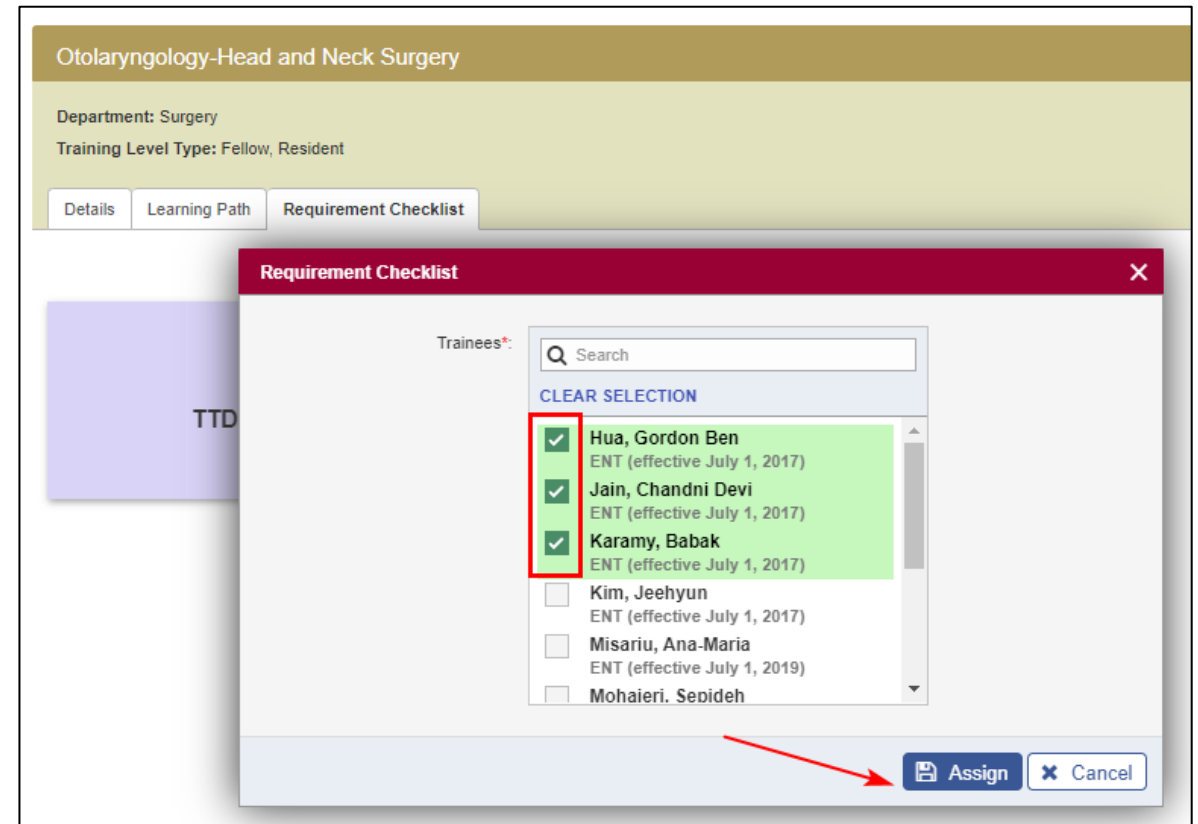
How to assign a Competence Committee Review Template to a trainee

- Click on the review and go to 'Assign'



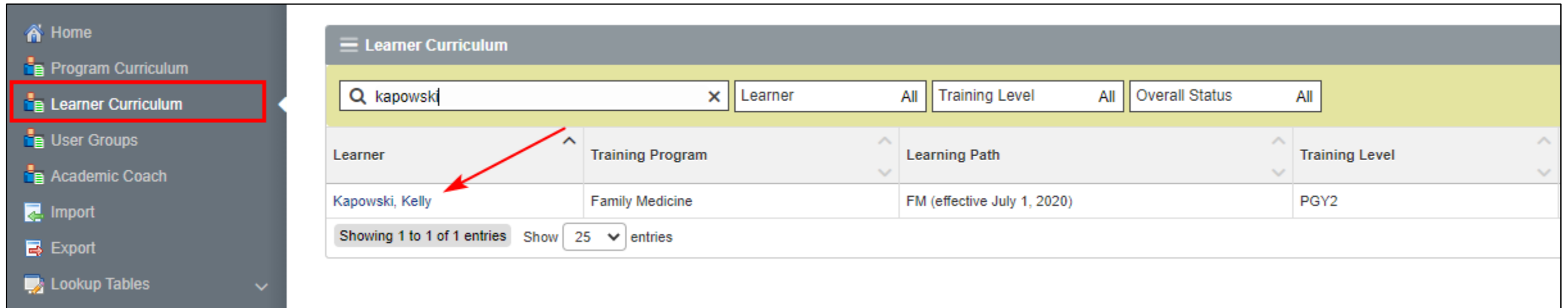
How to assign a Competence Committee Review Template to a trainee

- 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.



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



The screenshot displays the 'Learner Curriculum' interface. On the left is a navigation sidebar with the following items: Home, Program Curriculum, Learner Curriculum (highlighted with a red box), User Groups, Academic Coach, Import, Export, and Lookup Tables. The main content area is titled 'Learner Curriculum' and features a search bar with the text 'kapowski'. Below the search bar are filters for 'Learner' (All), 'Training Level' (All), and 'Overall Status' (All). A table below shows the search results:

Learner	Training Program	Learning Path	Training Level
Kapowski, Kelly	Family Medicine	FM (effective July 1, 2020)	PGY2

At the bottom of the table, it indicates 'Showing 1 to 1 of 1 entries' and a 'Show 25 entries' dropdown menu. A red arrow points from the search bar area to the 'Kapowski, Kelly' entry in the table.

How to access a trainee's Review Dashboard

Details EPAs Supporting Documentation Reflection Documentation Assessments Program Evaluations Events Activities Summary Report **Review Dashboard**

Initial PGY1 Portfolio Review Progressing as expected on schedule Total: 4

Search: [+ Add Requirement](#)

Sequence #	Requirement	Responsible for Requirement	Template Files	Files	Due Date	Step Complete	Last Updated
1	1) Learner Summary Report	Administrator		Report_Armanious_Miriam.pdf		<input checked="" type="checkbox"/>	18-Sep-2020
2	2) Resident Reflection	Trainee	Resident Reflection Template.pdf	Reflection_Sept2020.pdf		<input checked="" type="checkbox"/>	23-Sep-2020
3	3) Portfolio Review Form	Academic Coach	PGY-1 Initial Portfolio Review Form.pdf	PGY-1 Initial Portfolio Review Form - Dr Armanious.pdf		<input checked="" type="checkbox"/>	28-Sep-2020
4	4) Competence Committee Resident Report	Competency Committee	Competence Committee Resident Report Template.pdf	Competence Committee Resident Report - Miriam Armanious - Oct 2020.pdf		<input checked="" type="checkbox"/>	09-Oct-2020

Showing 1 to 4 of 4 entries Show 25 entries [First](#) [Previous](#) [1](#) [Next](#) [Last](#)

Meeting Date:

Date Decision Ratified:

Overall Status:

Comments:

[History](#) Last modified on 29-Oct-2020, 14:32 by Michelle Salfarlie. [Save](#) [Delete](#)

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.

How to customize a trainee's Competence Committee Review

The screenshot displays a web application interface for managing trainee reviews. A modal window titled "Requirement" is open, allowing for the customization of a requirement. The modal contains the following fields and options:

- Requirement*:** A dropdown menu currently set to "Enhanced Education Plans".
- Responsible for Requirement*:** A dropdown menu currently set to "Administrator".
- Due Date:** An empty text input field.
- Sequence #*:** A text input field containing the number "5".
- Step Complete:** A radio button selection currently set to "NO".
- Template Files:** A dashed box with the text "Drop files or click to upload".
- Files:** A dashed box with the text "Drop files or click to upload".
- Buttons:** "Save" and "Cancel" buttons at the bottom right of the modal.

The background page, titled "TTD Review", shows a table of requirements. The table has columns for "Sequence #", "Requirement", "Due Date", "Step Complete", and "Last Updated". The "Step Complete" column contains checkboxes. A "+ Add Requirement" button is located at the top right of the table area. A red arrow points from this button to the "Save" button in the modal window.

Sequence #	Requirement	Due Date	Step Complete	Last Updated
1	Learner Summary Report		<input type="checkbox"/>	
2	Academic Coach/File Reviewer Report		<input type="checkbox"/>	
3	Resident Reflection Report		<input type="checkbox"/>	
4	Competence Committee Report		<input type="checkbox"/>	

How to customize a trainee's Competence Committee Review

Start Date: 01-Jul-2020
Current Stage: Stage 1 - Transition to Discipline

Details EPAs Supporting Documentation Reflection Documentation Assessments Program Evaluations Events Activities Summary Report **Review Dashboard** [← Back](#)

☰ TTD Review Total: 5

Search: [+ Add Requirement](#)

Sequence # ^	Requirement	Responsible for Requirement	Template Files	Files	Due Date	Step Complete	Last Updated
1	Learner Summary Report	Administrator				<input type="checkbox"/>	
2	Academic Coach/File Reviewer Report	Academic Coach	Academic coach report template.docx			<input type="checkbox"/>	
3	Resident Reflection Report	Trainee	Resident reflection report template.docx			<input type="checkbox"/>	
4	Competence Committee Report	Competency Committee	Competence Committee Report Template.docx			<input type="checkbox"/>	
5	Enhanced Education Plans	Administrator				<input type="checkbox"/>	

Showing 1 to 5 of 5 entries Show 25 entries [First](#) [Previous](#) 1 [Next](#) [Last](#)

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

EPAs Supporting Documentation Reflection Documentation Assessments Program Evaluations Events Activities Review Dashboard

PGY2 In-Progress Portfolio Review (Hamilton Site) Progressing as expected on schedule Total: 6

Search:

Sequence #	Requirement	Responsible for Requirement	Template Files	Files	Due Date	Step Complete	Last Updated
1	1) Learner Summary Report	Administrator		Report_...	14-Oct-2020	<input checked="" type="checkbox"/>	28-Oct-2020
2	1.1) RCDC Report	Administrator		RCDC Report.docx		<input checked="" type="checkbox"/>	17-Sep-2020
3	1.2) Age/Sex Report	Administrator		...		<input checked="" type="checkbox"/>	17-Sep-2020
4	2) Resident Reflection	Trainee	Resident Reflection Template.pdf	..._Resident Reflection_September 21 (3).pdf		<input checked="" type="checkbox"/>	21-Sep-2020
5	3) Portfolio Review Form	Academic Coach	PGY2 In-Progress Portfolio Review.pdf	... - portfolio Sept 2020 .pdf		<input checked="" type="checkbox"/>	21-Sep-2020
6	4) Competence Committee Resident Report	Competency Committee	Competence Committee Resident Report Template.pdf	..._Competence Committee Resident Report.pdf		<input checked="" type="checkbox"/>	13-Oct-2020

Showing 1 to 6 of 6 entries Show 25 entries First Previous 1 Next Last

Meeting Date: 14-Oct-2020
Date Decision Ratified: 14-Oct-2020
Overall Status: Progressing as expected on schedule
Comments:

Navigating the Review Dashboard - Access

- PDs (Site Directors), PAs, 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

Details | EPAs | Supporting Documentation | Reflection Documentation | Assessments | Program Evaluations | Events | Activities | Summary Report | **Review Dashboard**

PGY2 In-Progress Portfolio Review (Hamilton Site) Total: 5

Search: + Add Requirement

Click on templates to download and complete **Click on completed files to view or download**

Sequence #	Requirement	Responsible for Requirement	Template Files	Files	Due Date	Step Complete	Last Updated
1	Learner Summary Report	Administrator		Report_... .pdf	14-Oct-2020	<input checked="" type="checkbox"/>	28-Oct-2020
2	RCDC Report	Administrator		RCDC Report.docx		<input checked="" type="checkbox"/>	17-Sep-2020
3	Resident Reflection	Trainee	Resident Reflection Template.pdf			<input checked="" type="checkbox"/>	02-Dec-2020
4	Portfolio Review Form	Academic Coach	PGY2 In-Progress Portfolio Review.pdf	Resident Reflection Report Template (1).docx		<input checked="" type="checkbox"/>	02-Dec-2020
5	Competence Committee Resident Report	Competency Committee				<input type="checkbox"/>	

Showing 1 to 5 of 5 entries Show 25 entries First Previous 1 Next Last

Meeting Date: 14-Oct-2020
Date Decision Ratified: 14-Oct-2020
Overall Status: Progressing as expected on schedule
Comments:

[History](#) Last modified on 02-Dec-2020, 11:47 by Chantelle Campbell. [Save](#) [Delete](#)

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

Requirement

Requirement*: Portfolio Review Form

Responsible for Requirement*: Academic Coach

Due Date: DD-MMM-YYYY

Sequence #*: 4

Step Complete: YES

Template Files:

- Drop files or click to upload
- PGY2 In-Progress Portfolio Review.pdf

Files:

- Drop files or click to upload
- Completed Prtfolio Review Form.docx

3. Save

Save Delete Cancel

PGY2 In-Progress Portfolio Review (Hamilton Site)

Progressing as expected on schedule Total: 5

Sequence #	Requirement	Responsible for	Due Date	Step Complete	Last Updated
1	Learner Summary Report	Administrator	14-Oct-2020	<input checked="" type="checkbox"/>	28-Oct-2020
2	RCDC Report	Administrator		<input checked="" type="checkbox"/>	17-Sep-2020
3	Resident Reflection	Trainee		<input checked="" type="checkbox"/>	02-Dec-2020
4	Portfolio Review Form	Academic Coach		<input checked="" type="checkbox"/>	02-Dec-2020
5	Competence Committee Resident Report	Competency C		<input type="checkbox"/>	

Showing 1 to 5 of 5 entries Show 25 entries

History Last modified on 02-Dec-2020, 11:47 by Chantelle Campbell.

Save Delete

Uploading completed forms

+ Add Requirement

First Previous 1 Next Last

Save Delete

1. Once the form is completed it needs to be uploaded to the dashboard. Click on the requirement to upload the completed form

2. Drag and drop the file here or click to upload the document from your computer desktop.

NOTE: ensure the green progress bar has finished before clicking save

Navigating the Review Dashboard – Meeting Dates and Overall Status

Details EPAs Supporting Documentation Reflection Documentation Assessments Program Evaluations Events Activities Summary Report **Review Dashboard**

PGY2 In-Progress Portfolio Review (Hamilton Site) Progressing as expected on schedule Total: 5

Search: [+ Add Requirement](#)

Sequence #	Requirement	Responsible for Requirement	Template Files	Files	Due Date	Step Complete	Last Updated
1	Learner Summary Report	Administrator		Report_... pdf	14-Oct-2020	<input checked="" type="checkbox"/>	28-Oct-2020
2	RCDC Report	Administrator		/ RCDC Report.docx		<input checked="" type="checkbox"/>	17-Sep-2020
3	Resident Reflection	Trainee	Resident Reflection Template.pdf			<input checked="" type="checkbox"/>	02-Dec-2020
4	Portfolio Review Form	Academic Coach	PGY2 In-Progress Portfolio Review.pdf	Resident Reflection Report Template (1).docx		<input checked="" type="checkbox"/>	02-Dec-2020
5	Competence Committee Resident Report	Competency Committee				<input type="checkbox"/>	

Showing 1 to 5 of 5 entries Show 25 entries First Previous 1 Next Last

Meeting Date: ← **Assign dates, overall status and any applicable comments and SAVE!**

Date Decision Ratified:

Overall Status: ← **Assign dates, overall status and any applicable comments and SAVE!**

Comments:

SAVE! →

History Last modified on 02-Dec-2020, 11:47 by Chantelle Campbell.