



COMPETENCE COMMITTEE REVIEW DASHBOARD SET-UP: RECYCLING REVIEW TEMPLATES

TARGET AUDIENCE: CBME PROGRAM ADMINISTRATORS Updated November 15, 2024





Competence Committee Review Dashboard Templates

Competence Committee Review Templates are created by Program Administrators to help facilitate CC Review through MedSIS.

Steps for setting up your program's CC Review Dashboard can be found here: <u>Guide: How to Setup the Competence</u> <u>Committee Review Dashboard (PDF)</u>

Recycling Previously Used CC Review Templates

If your program has the same requirements/follows the same steps when facilitating CC meetings, there is no need to create a new template from scratch if you have already created one previously that suits your program's needs.

Instead, you can simply "recycle" a previously created template that has been used during past CC Reviews by following the steps outlined below:

Creating a New Review Period

Review periods indicate the period of time the committee reviewing for the trainees (ie: July 1 – September 30, 2024).

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

i. Toggle to Curriculum > Lookup Tables > Requirement Checklist > Review Period Tab > Add New

👃 Cheyenne Reid	Ð	Home > Curriculum > Lookup Tables > Requirement Checklist								
🕌 Home		Requirement Promotion Meeting Outcome Meeting Purpose Review Period								
Learner Curriculum		E Review Period					Total: 404			
te User Groups		Search					+ Add New			
늘 Academic Coach		Name	Start Date	End Date	Program	0	Status 🔷			
👼 Import		(2021-22) CC Q1 (Jul 1-Sept 26, 2021)	01-Jul-2021	26-Sep-2021	Respirology		✓ Active			
📑 Export		(2021-22) CC Q2 (Sept 27, 2021-Jan 10, 2022)	27-Sep-2021	10-Jan-2022	Respirology		✓ Active			
📑 Lookup Tables 🖉 🖉		(2021-22) CC Q3 (Jan 11-Mar 28, 2022)	11-Jan-2022	28-Mar-2022	Respirology		✓ Active			
🔥 СВМЕ		(2021-22) CC Q4 (Mar 29-May 29, 2022)	29-Mar-2022	29-May-2022	Respirology		✓ Active			
💼 Program		(2021-22) Q1 - Jul 1, 2021 to Sept 9, 2021 (* For R5s, please use Jun 14, 2021-Sept 9, 2021)	01-Jul-2021	09-Sep-2021	General Internal Medicine		✓ Active			
🎄 Requirement Checklist	R	(2021-22) Q2 - Sept 10, 2021 to Nov 29, 2021	10-Sep-2021	29-Nov-2021	General Internal Medicine		✓ Active			
		(2024-202) 02 New 20-2024 M FEB 24-2022	20 Nov 2024	24 E-6 2022	A					

- ii. Name the Review Period so it's easily identifiable when you assign it to your template
- iii. Enter the Review Period Start Date
- iv. Enter the Review Period End Date
- v. Select your program name to link it to your program
- vi. Save your selections

📑 Add Review Period		
Name*:	Quarterly Review: July 1 - September 30, 2024	Active •
Start Date*:	01-Jul-2024	
End Date*:	30-Sep-2024	
Program*:	Psychiatry v	
		🔛 Save 🗶 Cancel

Assigning New Review Period to Previously Used Template

Open your program's current CC Review Template list:

i. Toggle to Curriculum > Program Curriculum





ii. Search for your program name from our Program Curriculum Database and click on the Description to open program settings

👃 Cheyenne Reid	Home > Curriculum > Program Curriculum
🎢 Home	∃⊟ Programs
Program Curriculum	Search: Psychiatry
Learner Curriculum	Description
Academic Coach	Child and Adolescent Psychiatry
a Import	Forensic Psychiatry
📑 Export	Psychiatry
🌄 Lookup Tables 🛛 🔨	Psychiatry-Waterloo
CBME	click to open
Program	program settings

iii. Toggle to "Requirement Checklist" tab to view all previously created templates

Cheyenne Reid	Home > Curriculum > Program Curriculum > Edk Program
🔏 Home	
🖨 Program Curriculum	Psychiatry Adve
Learner Curriculum	Department: Phychiatry and Behavioral Neurosciences
늘 User Groups	Training Level Type: Felow, Resident
🚔 Academic Coach	Debilis Learning Path Requirement Checklist
🛃 Import	
Export	(+ Add New Checklist)
🍃 Lookup Tables 🛛 🤿	
💑 СВМЕ	
na Program	Psychiatry CC Review
📥 Requirement Checklist	

iv. Click on top-right corner of previously created template and select "edit"

Details	Learning Path	cklist	
		은 Assign	
	Douchistry	CC Baylaw	🖉 Edit
	Psychiatry	🗍 Delete	

v. Edit the Review Period by clicking the drop-down and selecting the period you created in the previous step and save your changes





Requirement Checklist		×
Name*:	Psychiatry CC Review	
Sequence #*:	1	
Review Period*:	Quarterly Review: April 1 - June 30, 2024	
	Q Search	
	CLEAR	🖹 Save 🗙 Cancel
	Quarterly Review: April 1 - June 30, 2024	
	Quarterly Review: July 1 - September 30, 2024	

Assigning your Trainees to CC Template under the New Review Period

Now that you have updated the review period on your previously created template, you must reassign all applicable trainees to add the template to their dashboard.

i. Click on the top right corner of the template and select "assign"

	Assign
	🖉 Edit
Psychiatry CC Review	🖞 Delete

ii. Search for all applicable learners, select them from the learner database and click assign

Training Level:	Select	~
Current Stage:	Select	~
Learners*:	Q Search	
	CLEAR	
	 All States, Made France, States, Made France, States, Made France, States, Made 	
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	PERCENT AND A PROVIDE A PAGE 1, MARKING AND A PAGE 1	
	Province and and a series	
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Viewing your Recycled Template on Assigned Trainee Dashboards

Now that you have assigned your template, you can view the template on all assigned trainee dashboards through Learner Curriculum.

i. Toggle to Curriculum > Learner Curriculum

🎍 Cheyenne Reid	G	Home > Curriculum > Learner Curriculum			
🖌 Home		E Learner Curriculum	click learner na open dashbo	ard	
Learner Curriculum] {	Q Search	× Training Progra	m Psychiatry Training Se	ssion 2024 - 2025
🔓 User Groups		Learner	Training Program	Base Location	Learning Path
- . Import		A MAR PAR	Psychiatry	Hamilton Region	PSYCH (effective July 1, 2020)
Export		mage, total Paul	Psychiatry	Hamilton Region	PSYCH (effective July 1, 2020)
Lookun Tables		Andrea Andrease. These Tearrange	Psychiatry	Hamilton Region	PSYCH (effective July 1, 2020)
	Ť	And Cash Transit	Psychiatry	Waterloo Region	PSYCH (effective July 1, 2020)

ii. Toggle to "Review Dashboard" tab to view recycled template with new Review Period at the top and all historical reviews listed chronologically underneath

Details EPAs Supportin	g Documentation Reflection Documentation	Assessments Program Evaluat	ions Events Activities	Procedures Summary Repo	Review Dashboard			
			Recycled temp	blate with new Review attached	Period			+ Assign Checklist
∃ Psychiatry CC Review, I	Period: Quarterly Review: July 1 - Septer	nber 30, 2024 🥌			_			Total: 0
Search:								+ Add Requirement
Sequence # ^ Requirem	nent 🔷 Resp	onsible for Requirement	C Template Files		Files	Due Date	Step Complete	🔷 Last Updated 🛇
				No data available in table				
Showing 0 to 0 of 0 entries Sh	ow 25 V entries							rst Previous Next Last
Meeting Date: Date Decision Ratified: Overall Status: Purpose of Meeting: Outcome of Meeting: Promotion: Comments:	-Select- -Select- -Select- -Select-	> > > >			review template from srevious Review Period)		
History Created on 02-M	lov-2021, 18:12 by							🖺 Save 🛅 Delete
∃ Psychiatry CC Review, I	Period: Quarterly Review: April 1 - June 3	60, 2024						Total: 0

Questions?

- Please submit a detailed Jira ticket for further assistance.
 - o To submit a ticket, please visit medsishelp.mcmaster.ca
 - User Guide: <u>How to Submit a Ticket</u>