

# COMPETENCE COMMITTEE REVIEW DASHBOARD SET-UP: RECYCLING REVIEW TEMPLATES

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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: [Guide: How to Setup the Competence Committee Review Dashboard \(PDF\)](#)

## 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.

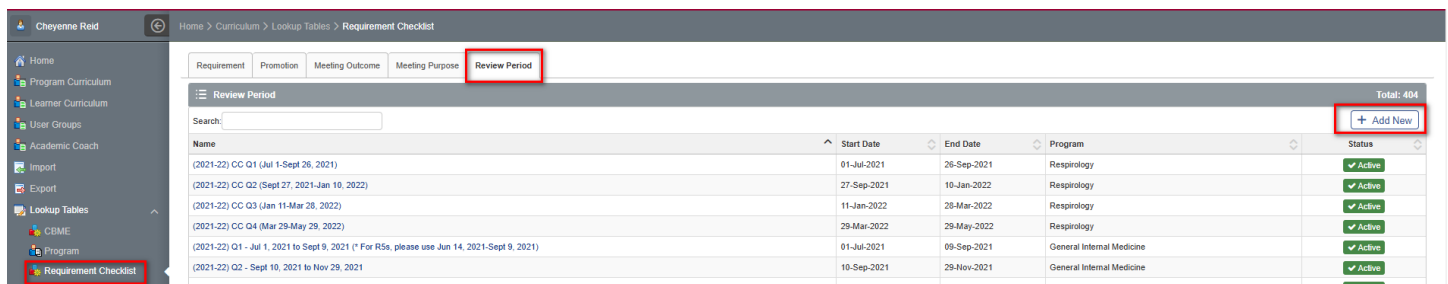
Instead, you can simply “recycle” a previously created template that has been used during past CC Reviews by following the steps outlined below:

### Creating a New Review Period

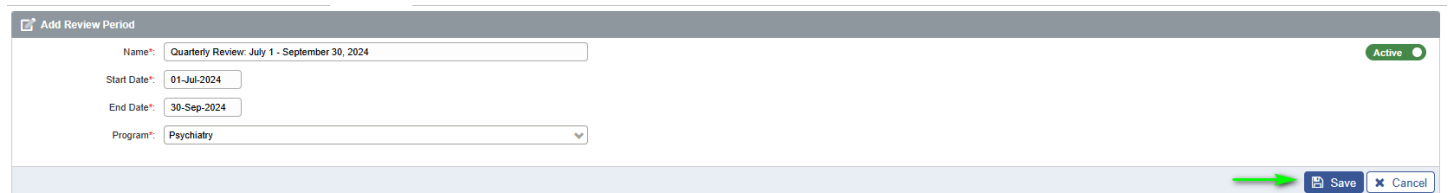
Review periods indicate the period of time the committee reviewing for the trainees (ie: July 1 – September 30, 2024).

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



- 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

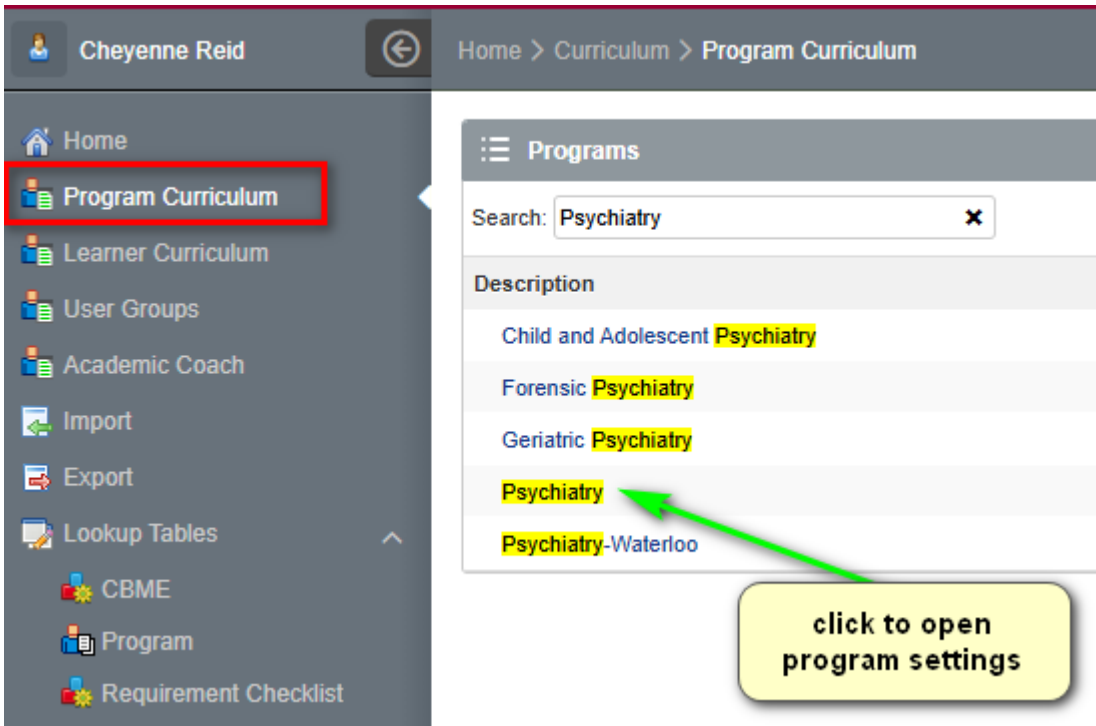


### Assigning New Review Period to Previously Used Template

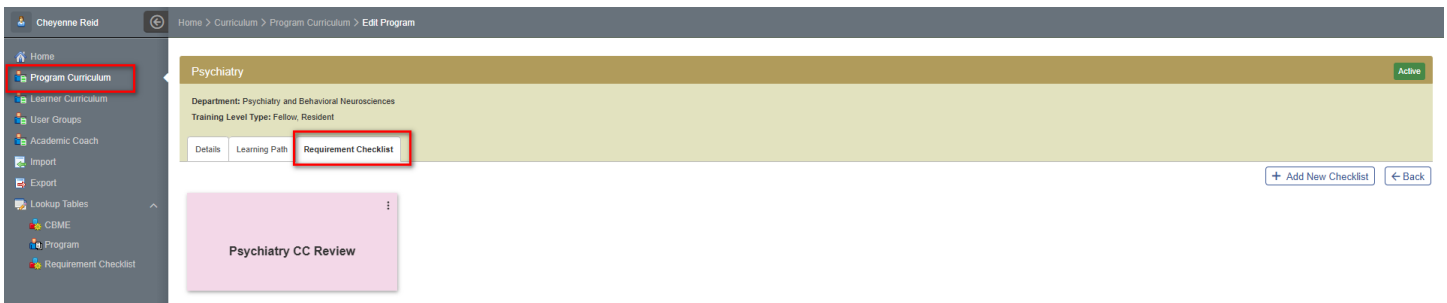
Open your program’s current CC Review Template list:

- i. Toggle to Curriculum > Program Curriculum

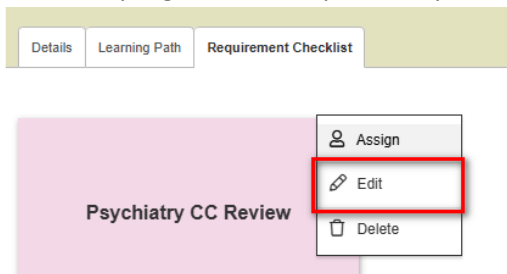
- ii. Search for your program name from our Program Curriculum Database and click on the Description to open program settings



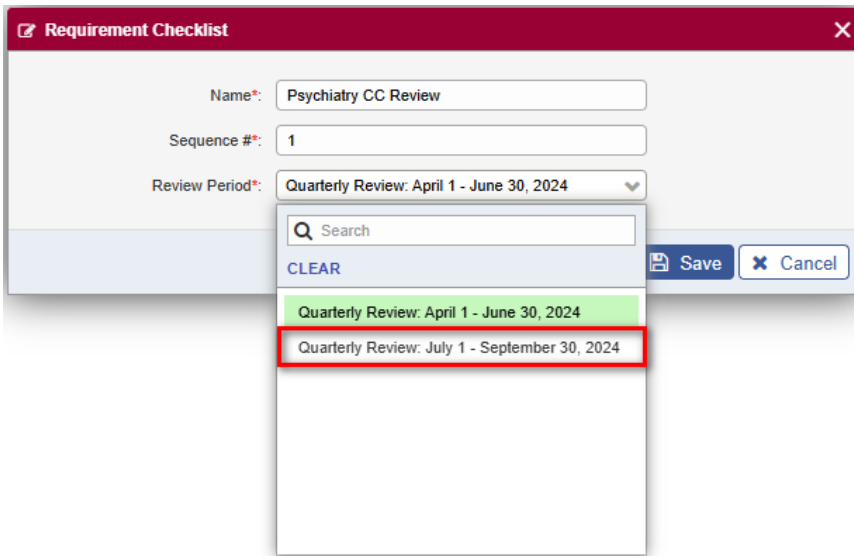
- iii. Toggle to “Requirement Checklist” tab to view all previously created templates



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



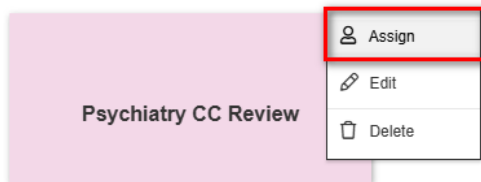
- v. Edit the Review Period by clicking the drop-down and selecting the period you created in the previous step and save your changes



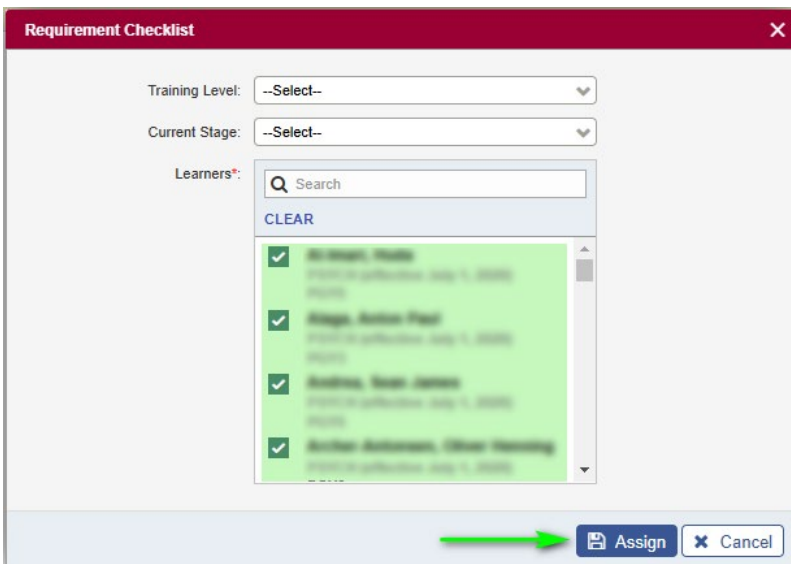
### Assigning your Trainees to CC Template under the New Review Period

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”



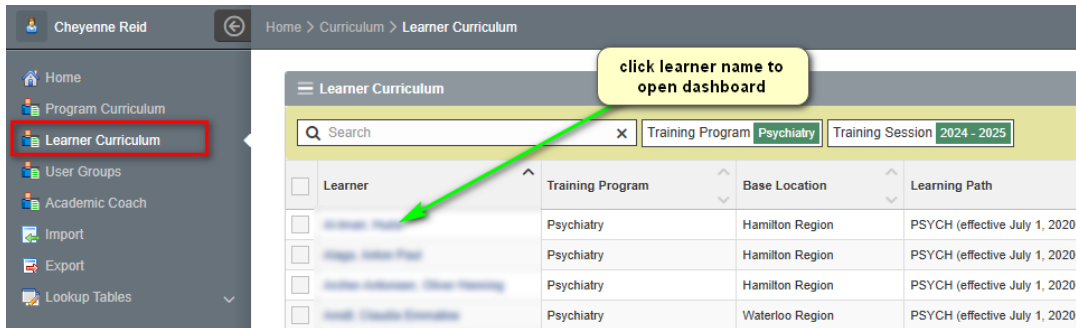
- ii. Search for all applicable learners, select them from the learner database and click assign



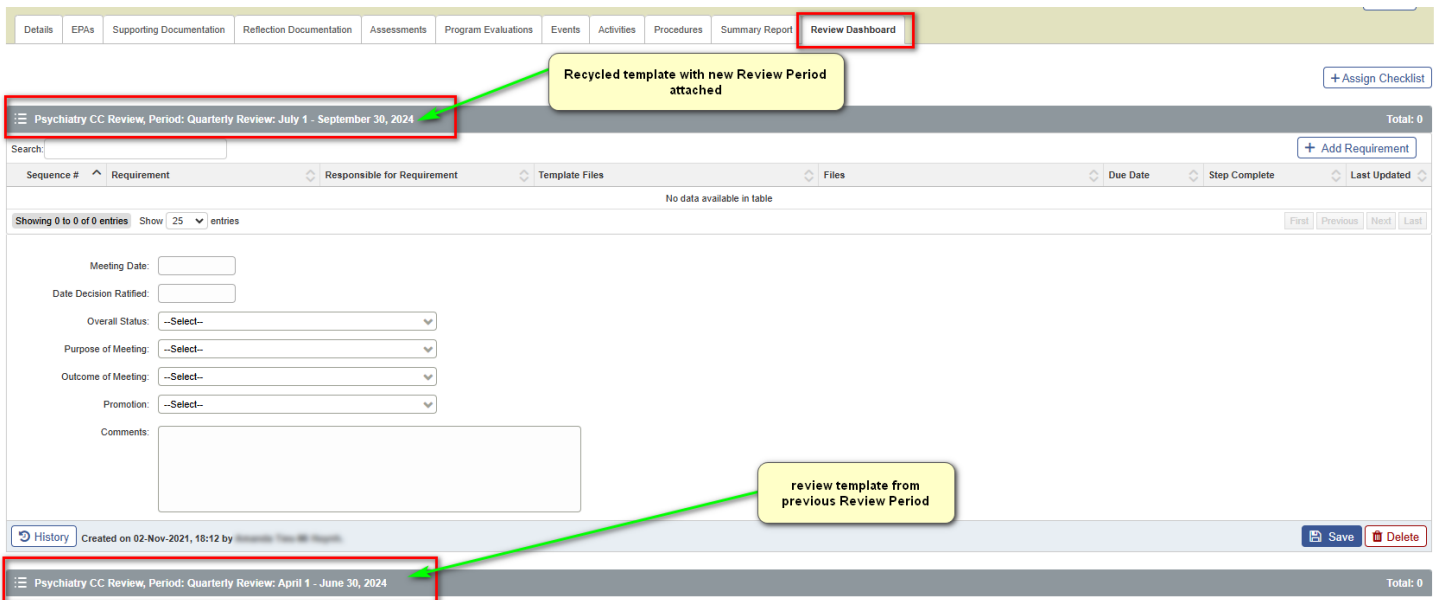
## Viewing your Recycled Template on Assigned Trainee Dashboards

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



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



## Questions?

- Please submit a detailed Jira ticket for further assistance.
  - To submit a ticket, please visit [medsishelp.mcmaster.ca](https://medsishelp.mcmaster.ca)
  - User Guide: [How to Submit a Ticket](#)