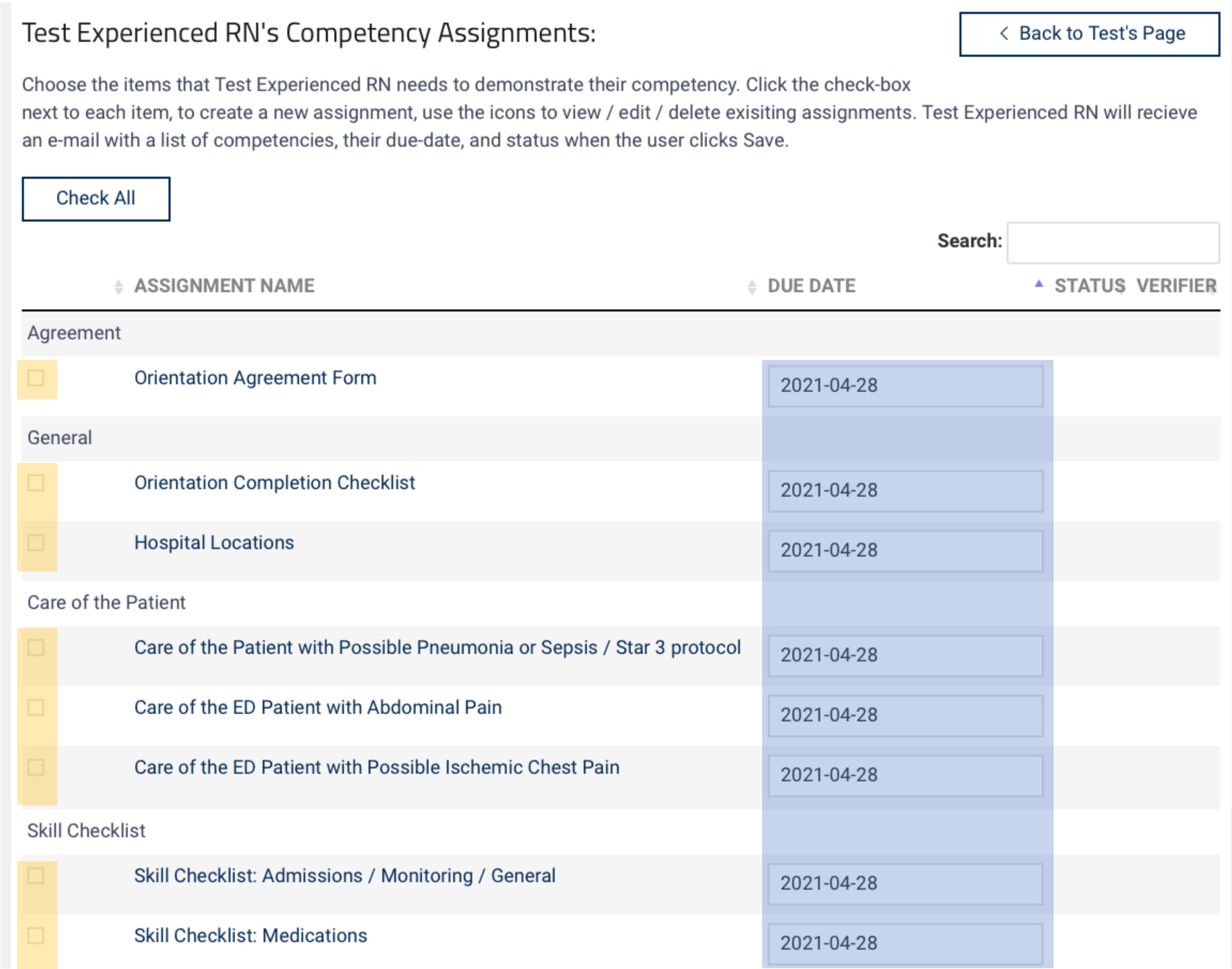
Quick Start Guide – Competency Management

Assigning, Documenting, and Retaining records for Orientation Nurses and Leadership Users:

1. Log-in using your Username & Password
2. Once logged in users are re-directed to the Dashboard, navigate to an individual Learner's page: within the Quick Links on the left is a button: Assign Competencies



Test Experienced RN's Competency Assignments:

Back to Test's Page

Choose the items that Test Experienced RN needs to demonstrate their competency. Click the check-box next to each item, to create a new assignment, use the icons to view / edit / delete exisiting assignments. Test Experienced RN will recieve an e-mail with a list of competencies, their due-date, and status when the user clicks Save.

Check All

Search:

	ASSIGNMENT NAME	DUE DATE	STATUS	VERIFIER
Agreement				
☐	Orientation Agreement Form	2021-04-28		
General				
☐	Orientation Completion Checklist	2021-04-28		
☐	Hospital Locations	2021-04-28		
Care of the Patient				
☐	Care of the Patient with Possible Pneumonia or Sepsis / Star 3 protocol	2021-04-28		
☐	Care of the ED Patient with Abdominal Pain	2021-04-28		
☐	Care of the ED Patient with Possible Ischemic Chest Pain	2021-04-28		
Skill Checklist				
☐	Skill Checklist: Admissions / Monitoring / General	2021-04-28		
☐	Skill Checklist: Medications	2021-04-28		

Figure 10 – Competency Add Assignments

A new window opens where you can check the box (highlighted yellow) next to each Competency Template[16] and add a Competency Assignment to the Individual's To-Do List. Use Check All to quickly assign all the available Competency Templates.

The due-date is automatically set to 90 days for Preceptors or the Anticipated End Orientation Date for Learners (highlighted blue). You can return to this page and adjust the due-dates at a later time and the assignments will be updated in mass.

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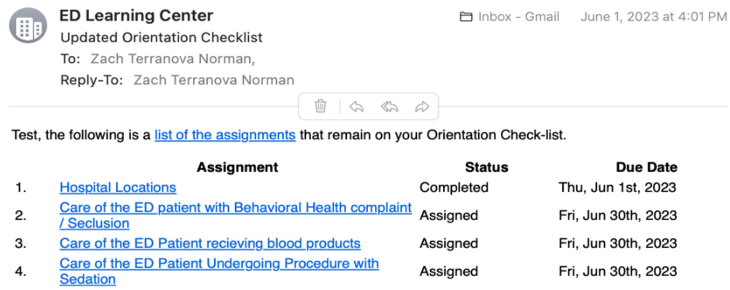
[16] A Competency Template outlines the items that need to be completed in order for the participant to be deemed competent to complete the described care independently. There is more detailed documentation on page: 195.

Clicking Save will send an e-mail to the participant notifying them of their assignments:

It will also add the assignments to their To-Do List.


ED Learning Center
Updated Orientation Checklist
To: Zach Terranova Norman,
Reply-To: Zach Terranova Norman

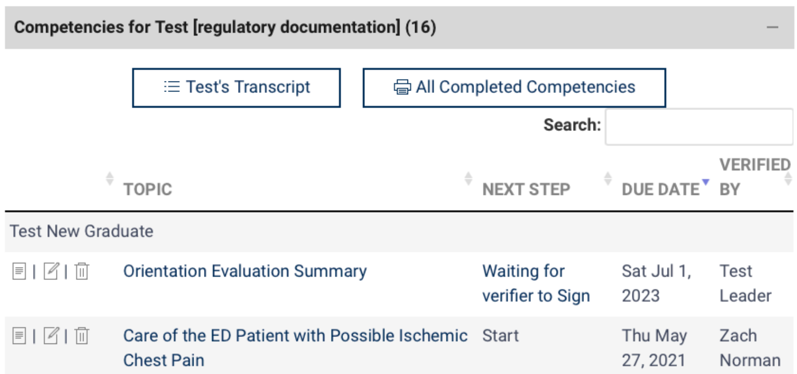
Inbox - Gmail June 1, 2023 at 4:01 PM

Test, the following is a list of the assignments that remain on your Orientation Check-list.

	Assignment	Status	Due Date
1.	Hospital Locations	Completed	Thu, Jun 1st, 2023
2.	Care of the ED patient with Behavioral Health complaint / Seclusion	Assigned	Fri, Jun 30th, 2023
3.	Care of the ED Patient recieving blood products	Assigned	Fri, Jun 30th, 2023
4.	Care of the ED Patient Undergoing Procedure with Sedation	Assigned	Fri, Jun 30th, 2023

Verifying that a Learner or Preceptor has completed all the requirements to be competent for a given topic:

1. Open the link[17] from the E-mail sent when the Learner / Preceptor selected you to verify their competency. The message is from *ED Learning Center (website@edorientaiton.com)*


Competencies for Test [regulatory documentation] (16)

Test's Transcript | All Completed Competencies

Search:

TOPIC	NEXT STEP	DUE DATE	VERIFIED BY
Test New Graduate			
Orientation Evaluation Summary	Waiting for verifier to Sign	Sat Jul 1, 2023	Test Leader
Care of the ED Patient with Possible Ischemic Chest Pain	Start	Thu May 27, 2021	Zach Norman

Figure 11 - To-Do List: Competencies

2. Click on the Topic
3. Complete all the Fields that are outlined yellow.
4. Click Sign & Submit

The person who's been verified is notified in an e-mail when the document is signed.

An **Orientation Nurse** or **Leadership** User who has logged-in can skip ahead to verify:

1. Navigating to the To-do list of the Learner or Preceptor, select the topic to verify.

2. Complete all the fields outlined yellow.

3. Click Sign & Submit.

Reviewing All Completed Assignments

1. Navigate to the desired user's Transcript
2. Click All Completed Competencies
3. Print the records.

[17] The normal process for verifying competency:
1. Assignments are given for all the required Orientation Documentation,
2. The Learner or Preceptor that was assigned fills in all the fields highlighted yellow and selects someone who can verify their competency.
3. The selected user opens a link from an e-mail, they finish remaining yellow fields, and click Sign & Submit,
4. The Orientee is notified and can print off the record and submit it to Leadership.