SIMULATIONiQ™ Enterprise

Courses

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Contents

Courses

Introduction

The SIMULATIONiQ™ Enterprise Courses task enables administrators and educators to create a Course that participants can register for and complete.

A Course is a means to assign one or many cases and/or scenarios, define prerequisite material, and track the learner's completion of those cases and scenarios by the learners themselves, and by administrators and educators.

Not only can each participant track his or her progress and completion of the cases and scenarios assigned to the course, but also, view the course completion status for all courses to which he or she is assigned.

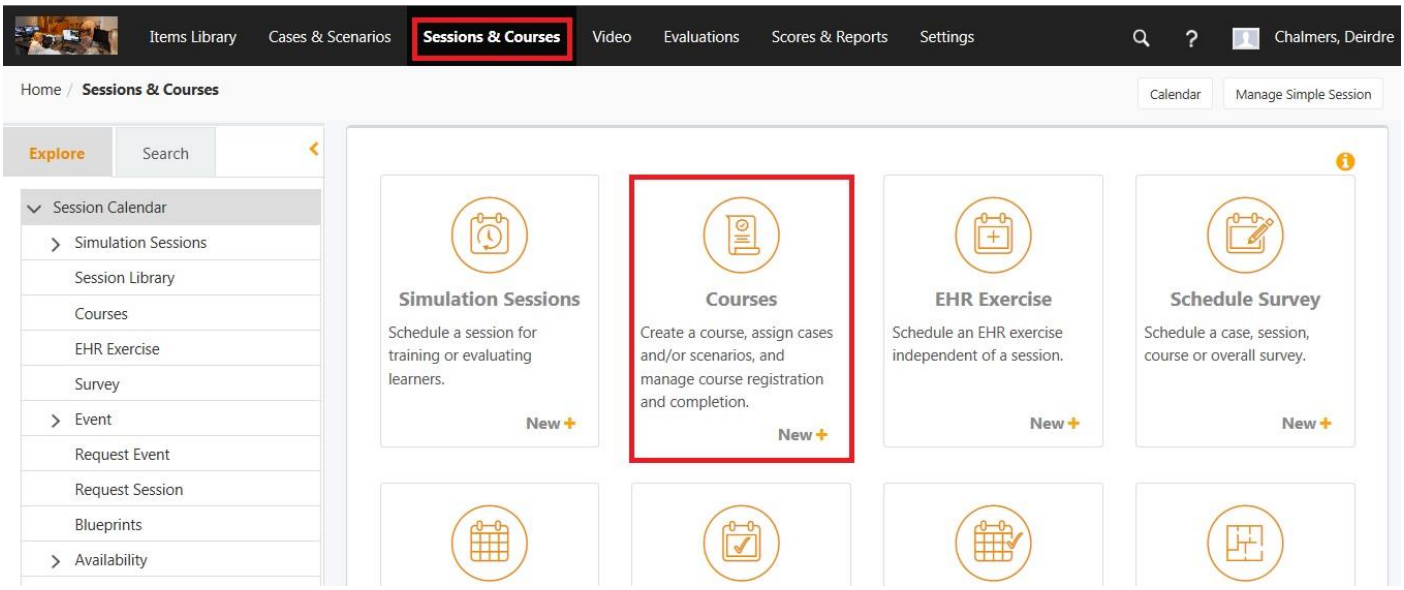
A participant gains credit toward completing the Course by being assigned to or signing up for a scheduled Session that holds a case or scenario that is a part of the Course. Credit is given once the session starts.

***Note*:** To use all of the Course features, you must first set-up the following in the Settings module:

- Organization Structure
- Learner Groups
- Email Settings

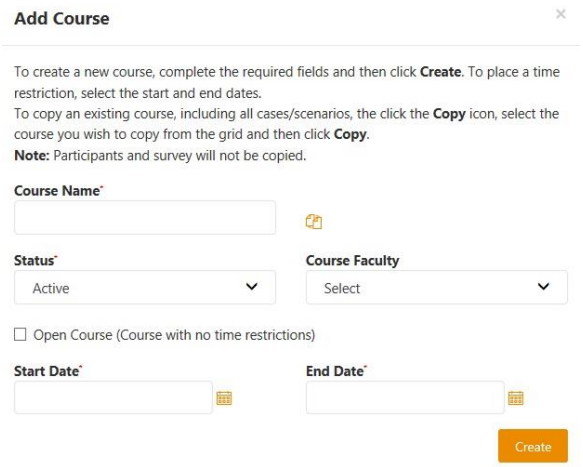
Email Notification	Sent When
Course is open for registration *The **Course Open** email template must be in Active status in Settings.*	Sent to the participant when he or she is added to the course.
Course has been completed *The **Course Completion** email template must be in Active status in Settings.*	Sent to the participant when all the cases and scenarios in the course have been completed.

Create a Course



To create a Course:

1. Click the **Sessions & Courses** module and then click the **New** button next to **Courses**. The **Add Course** screen appears.



2. To create a **new** course, enter the **Course Name**.

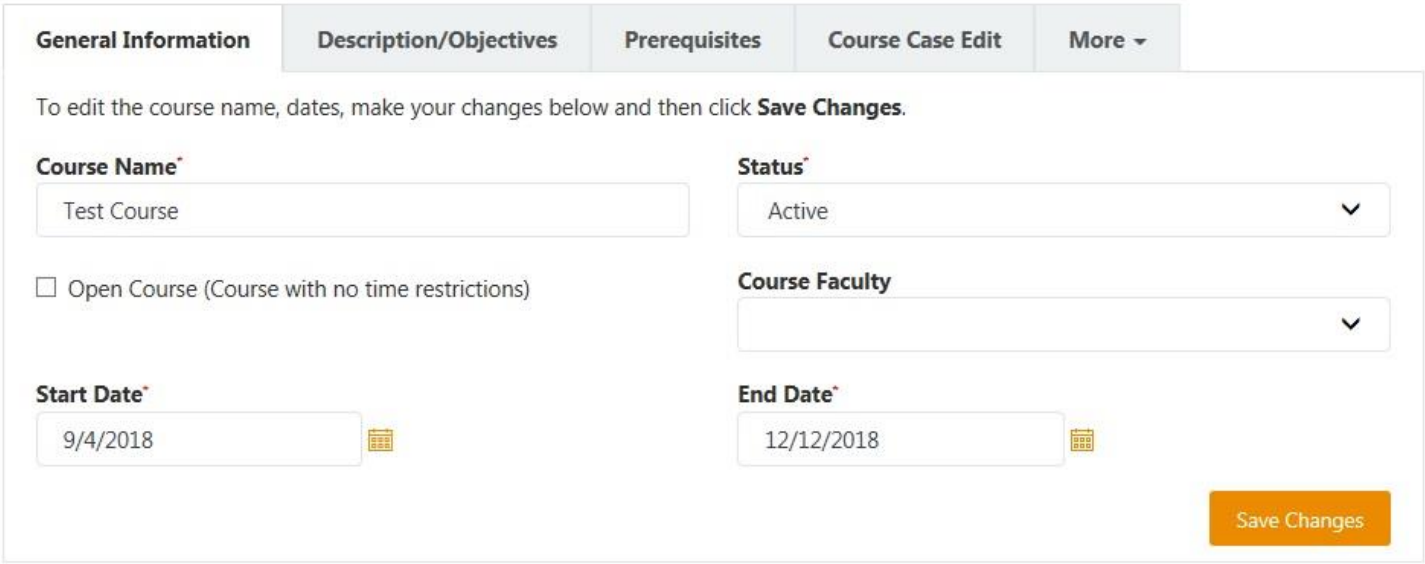
   To **copy** an existing course, including all cases/scenarios, click the **Copy** icon, select the course you wish to copy from the grid and then click **Copy**. ***Note*:** Participants and survey will not be copied.

3. To place a time restriction on the Course, select the **Start** and **End** dates (only current and future dates) or click **Open Course** to create a course with no time restrictions. ***Note***: Once **Open Course** is checked, the **Start** and **End Date** fields are disabled.

4. Click **Create**. The **Course** activity page appears.

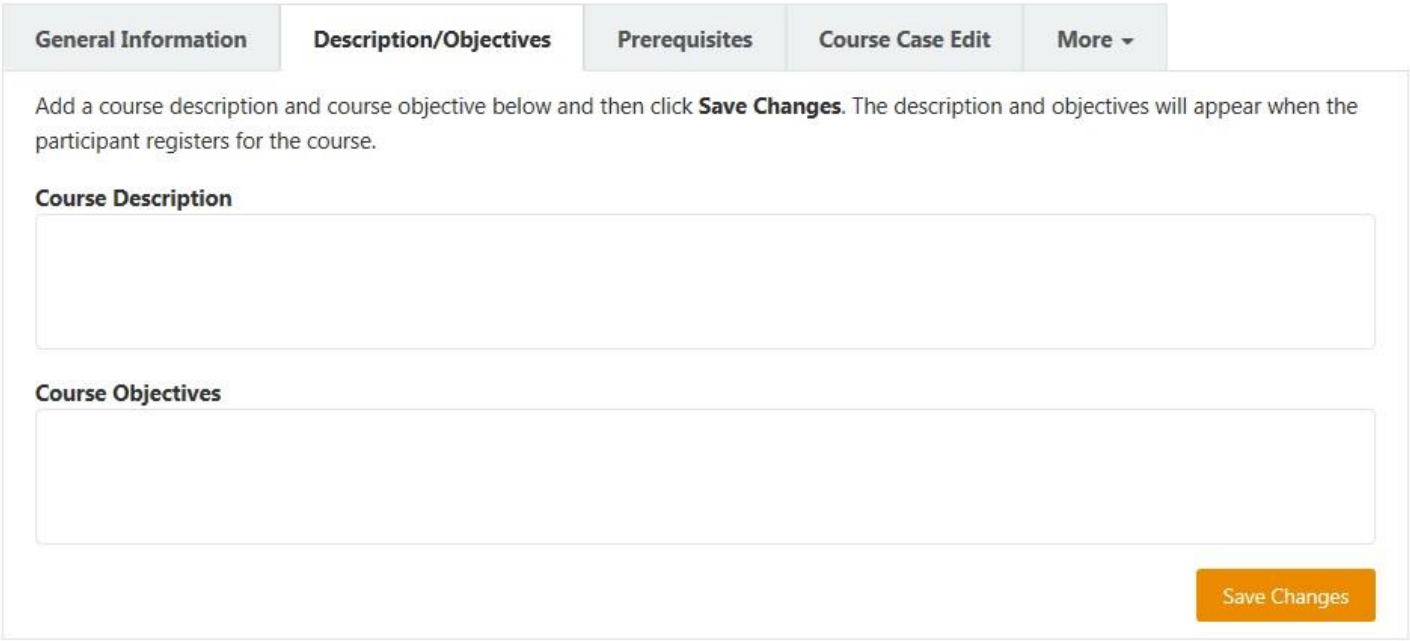
General Information section

Use the **General Information** tab to make changes to the Course name, dates, status, and/or Educators (if applicable) and then click **Save Changes**.



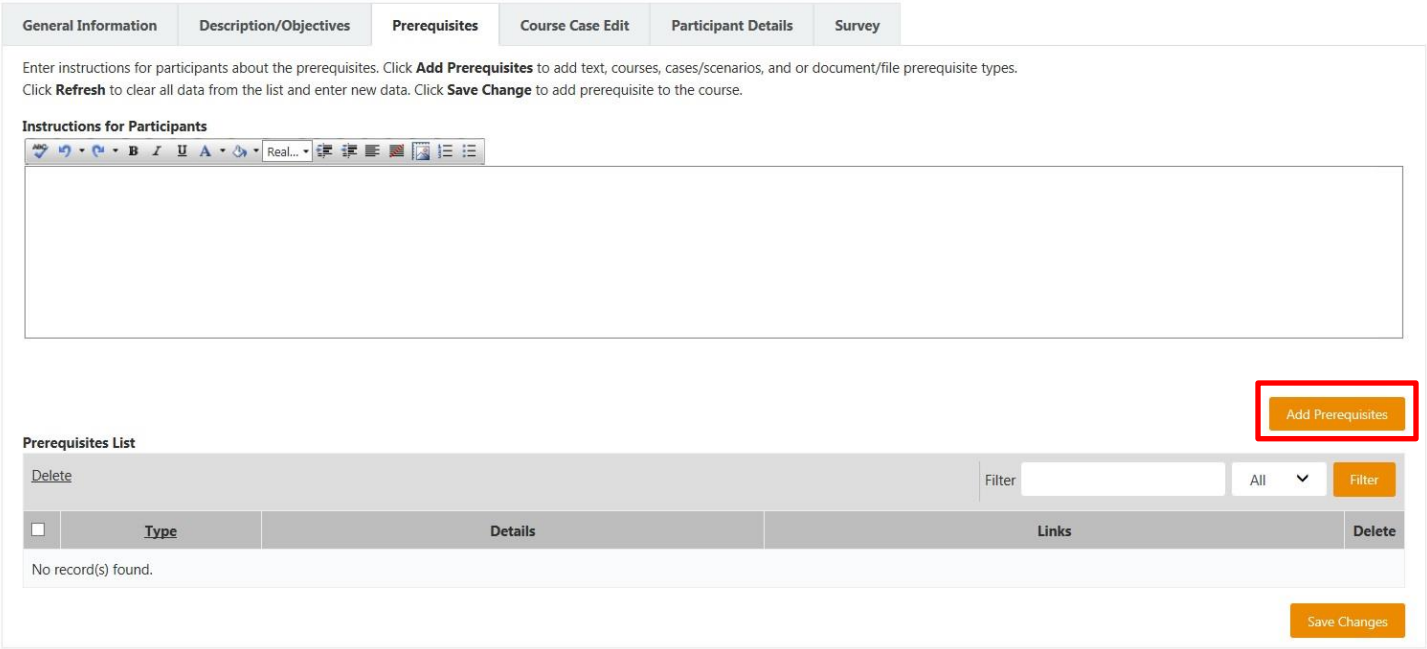
Course Description/Objectives section

Use the **Description/Course Objectives** section to add a course description and course objectives and then click **Save Changes**. ***Note***: The description appears when the participant registers for the course.



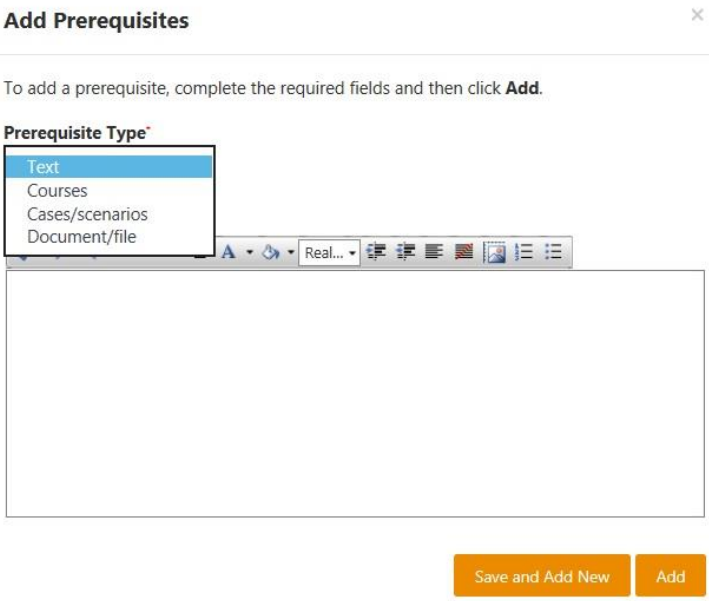
Prerequisites section

Use the **Prerequisites** section (optional) to add the requirements for participants to register for the Course. Participants must satisfy these requirements before registering for the Course.



<u>To add Course prerequisites:</u>

1. Enter instructions for participants about the prerequisites.
2. Click **Add Prerequisites**. The **Add Prerequisites** screen appears.



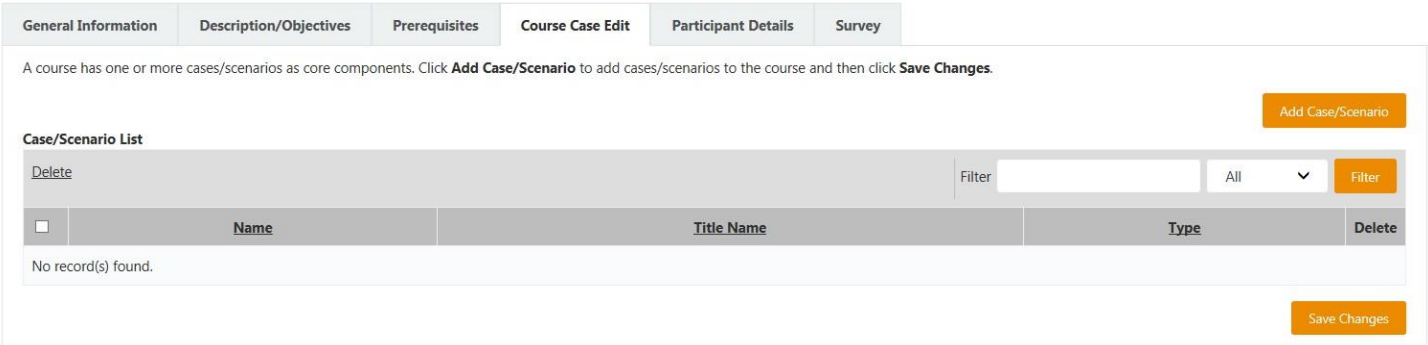
3. In the **Prerequisite Type** field, select one of the following:

Prerequisite Type	Description
Text	Display the prerequisite as a statement or a question.
Courses	Search for and select one or more existing Courses to display as prerequisites. ***Note***: All active Courses are displayed.
Cases/Scenarios	Search for and select one or more existing Cases/Scenarios to display as prerequisites. ***Note***: All active Cases/Scenarios are displayed.
Document/File	Search, select and upload a file to display as a prerequisite or add the file from the Multimedia Library.

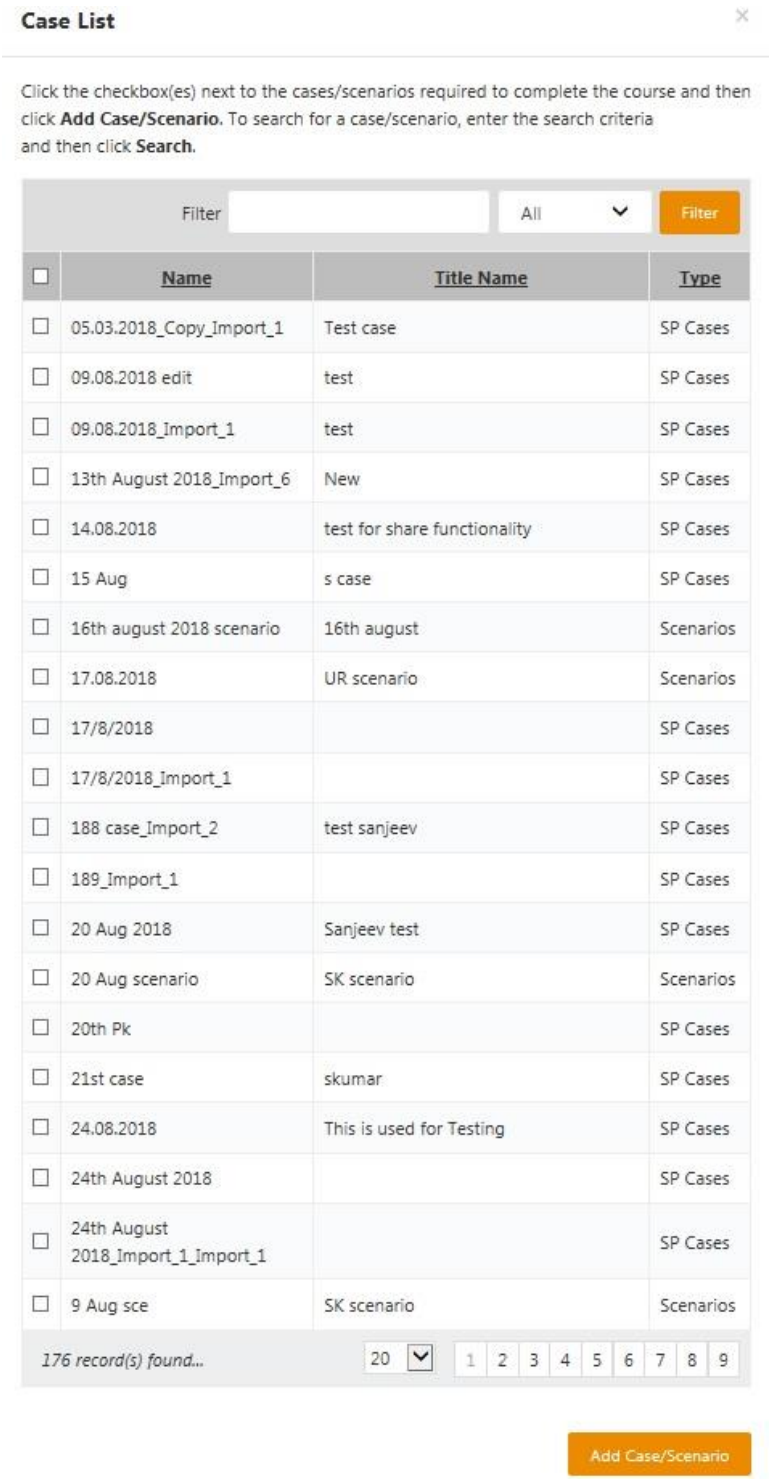
4. Click **Save and Add New** to add the prerequisite and then add another prerequisite. Once you have added all prerequisites, click **Add**. All Prerequisites appear in the Prerequisite List in the Prerequisite section of the Course Activity page.

Cases/Scenarios section

Use the **Cases/Scenarios** section to add cases/scenarios to the Course.



1. Click **Add Case/Scenario**. The **Case/Scenario List** appears.



2. Search for and select the cases/scenarios required to complete the course and then click **Add**. The selected cases/scenarios appear on the Case/Scenario List section of the Course activity page.

   IMPORTANT! Cases/scenarios already added to this Course do not appear in this list.

Participant Details section

Use the **Participant Details** screen to add learner groups and/or individual participants to the course.

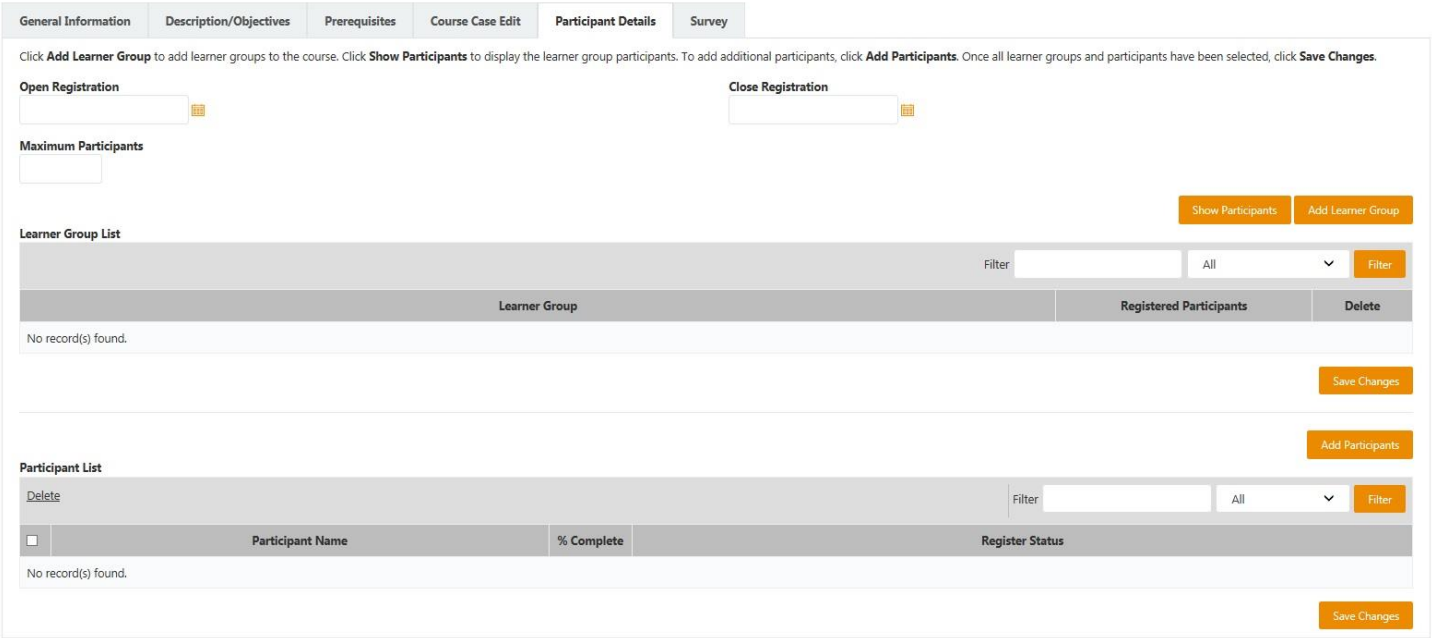
To add the dates to register for the Course:

1. Click the calendar icons to select the **Open** and **Close Registration** dates. ***Note***: Enter a current or future date in the Open and Close Registration date fields. The Close Registration date should be greater than the Open Registration date and less than the Course end date.

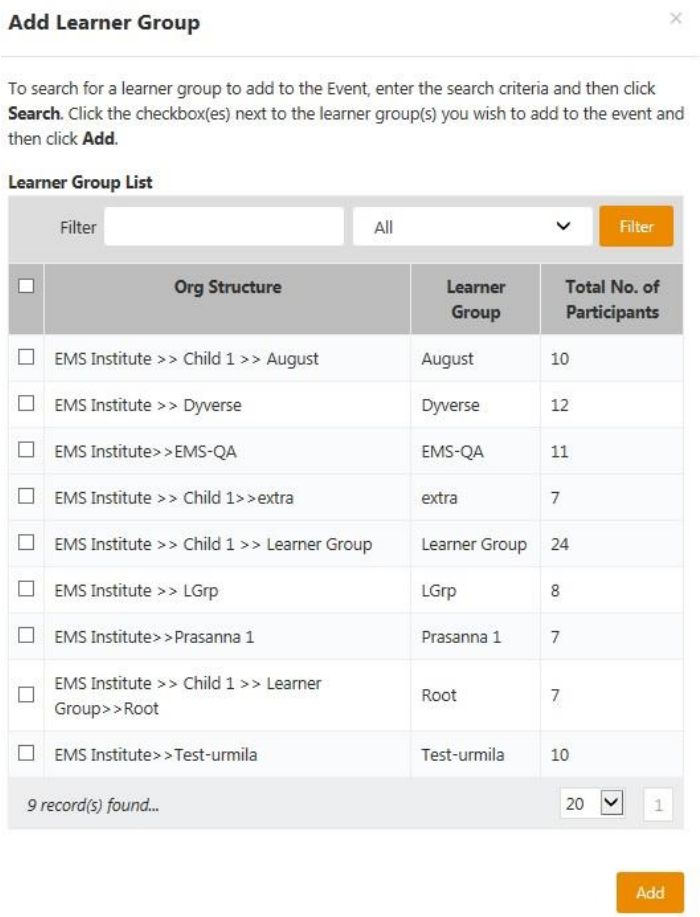
To add Learner Groups:

Adding Learner Groups allows learners who are members of that learner group to self-register for the Course. All members of the learner group will get the link on the Message section of their dashboard to register for the Course. When the defined number of maximum participants are met, the register link will no longer be on the remaining learners' dashboards. If you would rather assign the learners, click on the Add Participant button and select the participants' names.

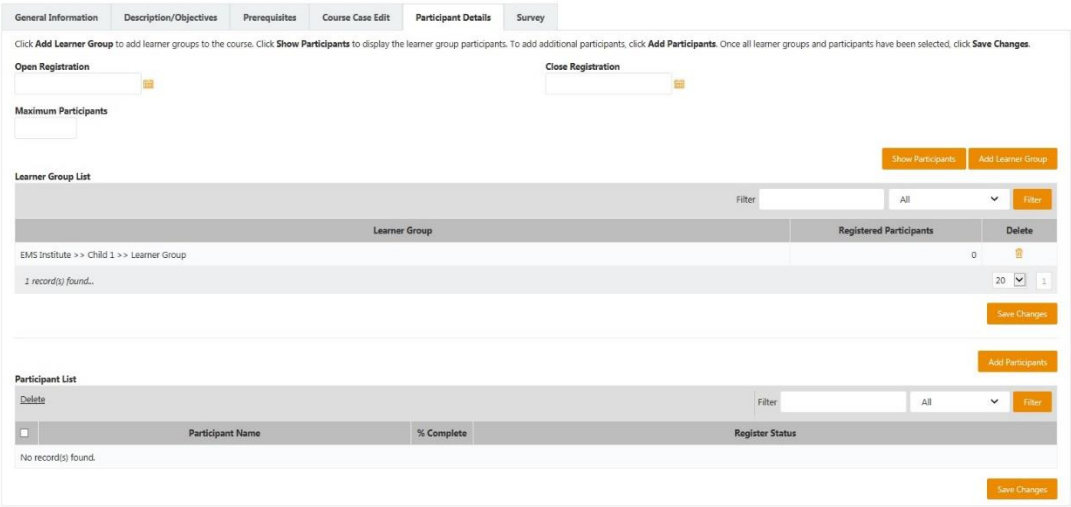
IMPORTANT! You must first set-up the Organization Structure and Learner Groups in the Settings module.



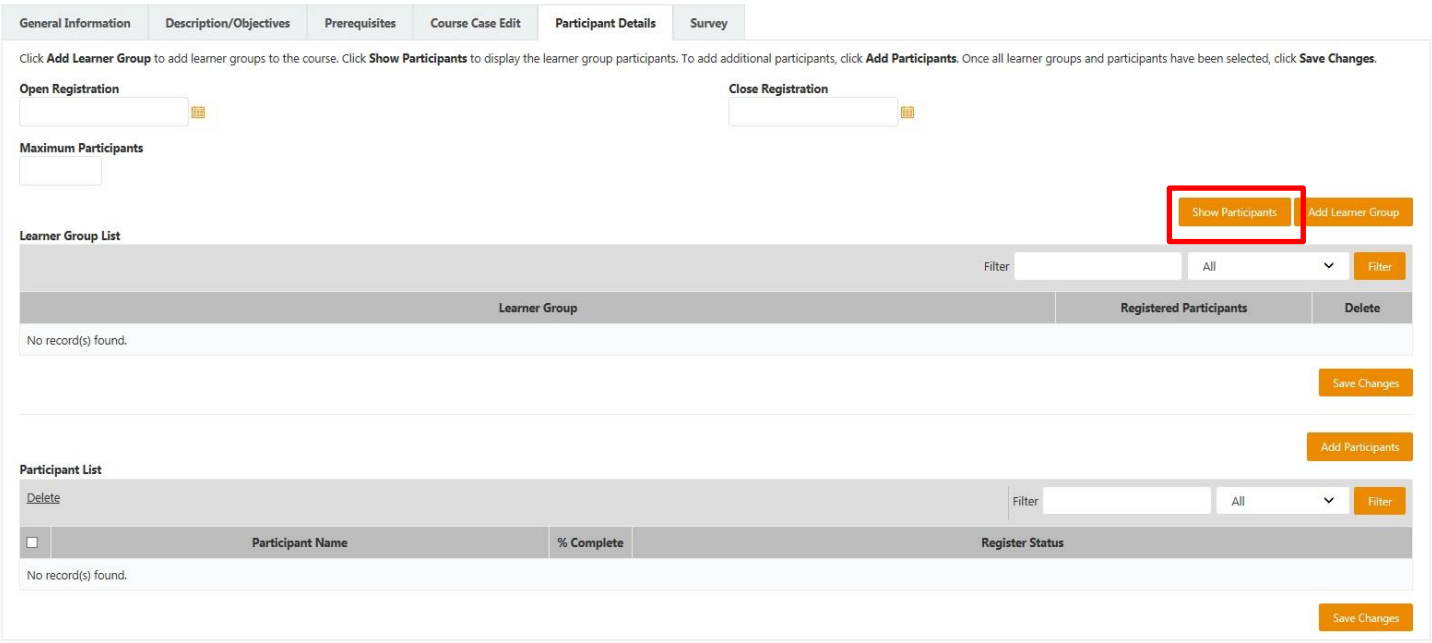
1. Click **Add Learner Group**. The Add Learner Group screen appears.



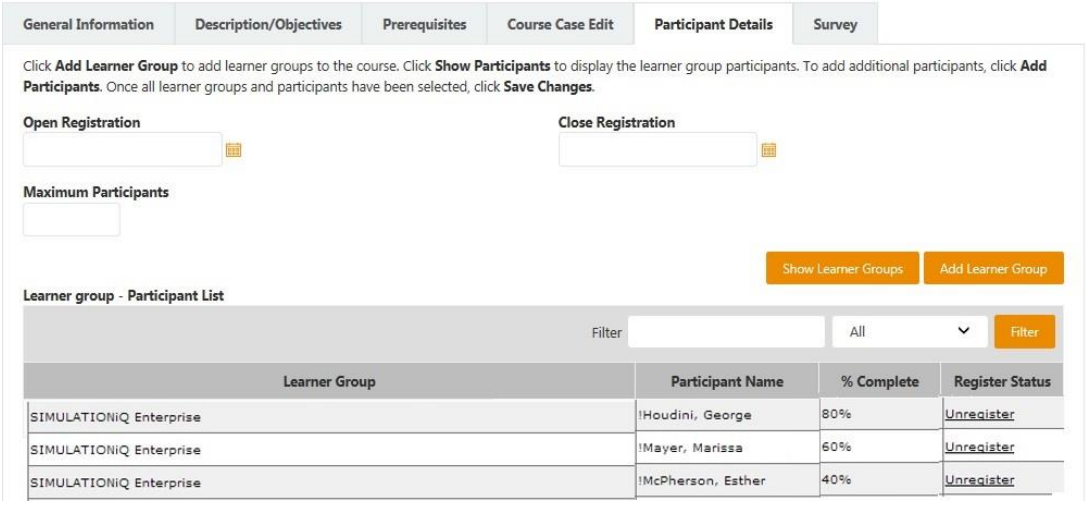
2. Search for and select the learner groups to add all participants within the selected learner group(s) to the course and then click **Add**. The Learner Groups appear in the Learner Group List.



Show Participants:



1. Click **Show Participants** to display the learner group participants.

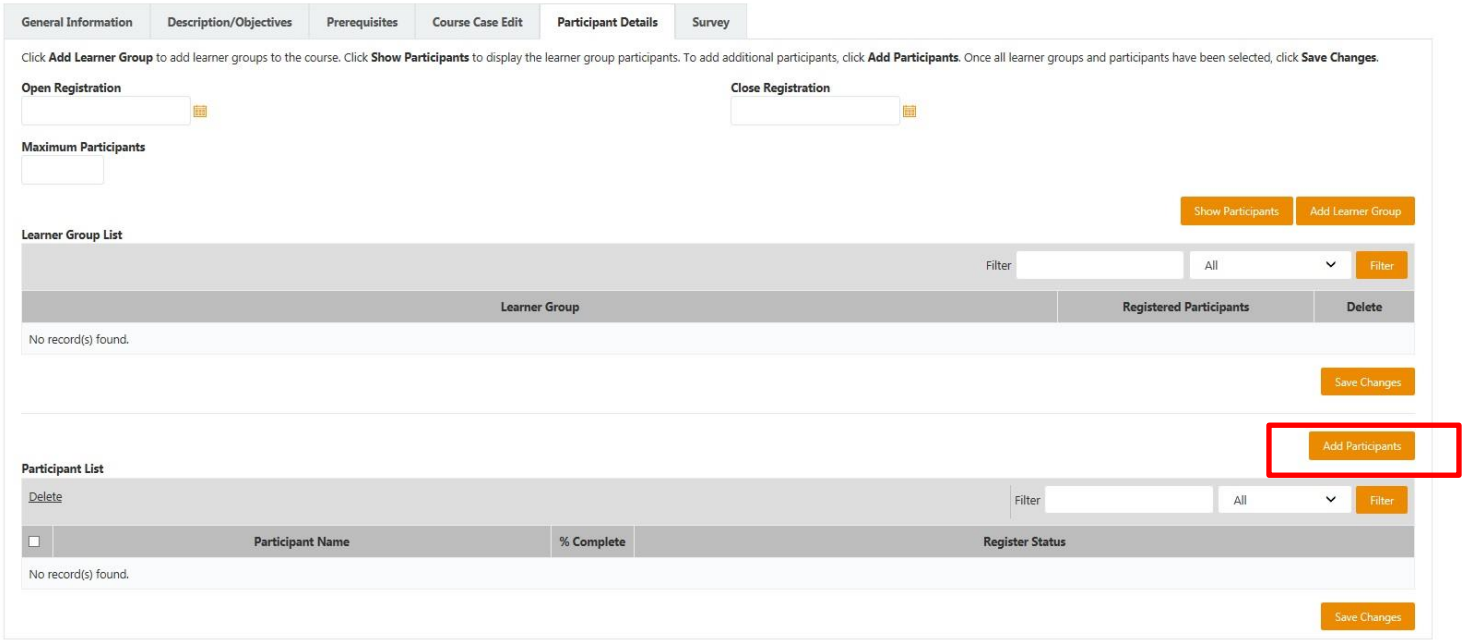


2. The Learner Group/Participant List appears and includes:
   - Learner Group
   - Participant Name
   - Percentage of the Course that the participant has completed
   - Participant's registration status: Click the **Unregister** link to unregister a registered participant from the course.

Note: Click **Show Learner Groups** to switch back to the Learner Group view.

3. Once all learner groups have been selected, click **Save Changes**. The Learner Groups appear in the Learner Group List, including the Total Number of Participants.

To assign individual participants:



1. Click **Add Participants.** The **Add Participants** screen appears.

   IMPORTANT!

   - To avoid duplication, if a participant is a part of a Learner Group that appears in the Learner Group list, then the learner will not appear in the individual participants list.
   - If a participant is added to the Participant List individually, but the participant's Learner Group is deleted, the participant's name will still remain in the Participant List.
   - If a participant from the Participant List has registered for the Course, then the participant will not appear in the Participant List, but will appear in the grid when you click **Show Participants**.
   - If a learner group is deleted, any registered participants will still appear in the grid when you click **Show Participants**.

Add Participants

To search for participants/learner groups, enter the search criteria and then click Search.
Click the checkbox(es) next to
the participants you wish to add to the course and then click Add.

Learner Group Any

Keyword

In Any

Graduation Year Any

Search

Participants who are not included in a learner group appear below.

Participant List

Filter All Filter

☐	Name	Student ID
☐	1, len	183
☐	2, len	184
☐	aero, aeroline, A	506
☐	ems, l1	4
☐	ems, l10	13
☐	ems, l100	103
☐	ems, l11, a	14
☐	ems, l12, b	15
☐	ems, l13, c	16
☐	ems, l14	17
☐	ems, l15	18
☐	ems, l16	19
☐	ems, l17	20
☐	ems, l18	21
☐	ems, l19	22
☐	ems, l2	5
☐	ems, l20	23
☐	ems, l21	24
☐	ems, l22	25
☐	ems, l23	26

121 record(s) found... 20 1 2 3 4 5 6 7

Add

2. Search for and select specific participants within learner groups and/or specific participants not part of a learner group to add to the course and then click **Add**. The participants appear in the Participant List.

3. Once all learner groups and participants have been selected, click **Save Changes.**

IMPORTANT!

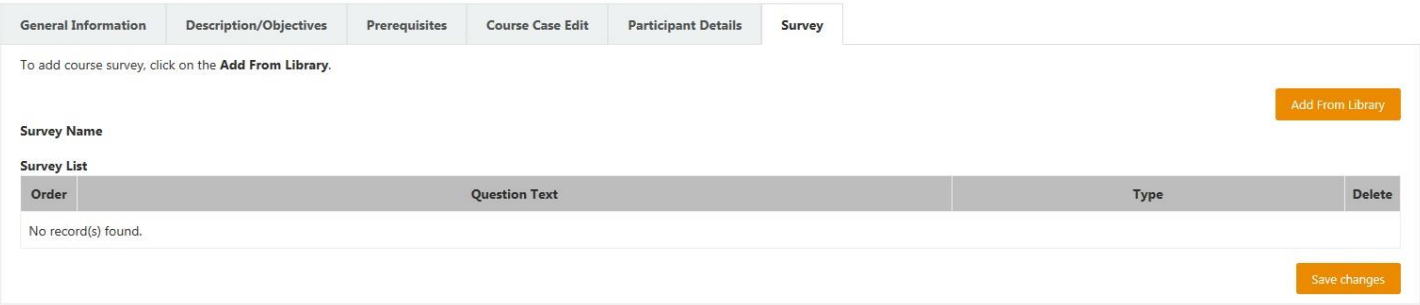
- Once a participant is added to the Course:
  - a self-registration link appears on the participant's dashboard to register for the Course.
  - an email notification is sent indicating that the Course is open for registration (Settings > Email settings > Course Open must be set to Active).

Email Notification	Sent When
Course is open for registration *The **Course Open** email template must be in Active status in Settings.*	Sent to the participant when he or she is added to the course.

- When a participant is added to a course, he or she is linked to all the cases or scenarios in that course. The participant will get credit when he or she attends any session that has a case or scenario that is associated with the Course.
- Participants need to complete all cases and scenarios associated with the Course.
- Courses with registered participants cannot be deleted.
- All sessions that have cases and scenarios that are a part of a Course cannot be deleted.

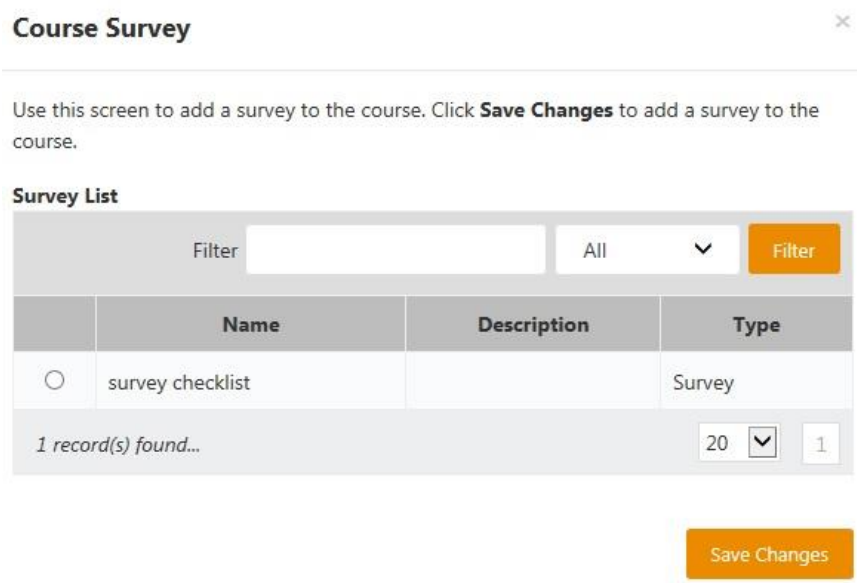
Course Survey section

Use the **Survey** section to present a survey to all learners after completing all the cases/scenarios in the course. ***Note***: Surveys with responses cannot be deleted.

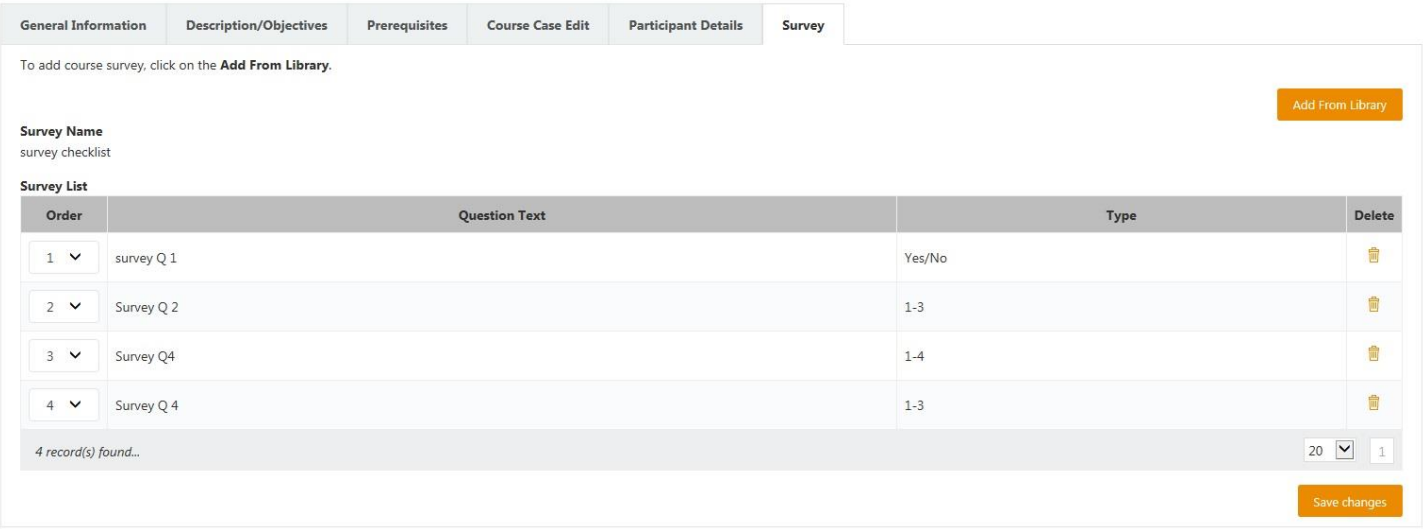


<u>To add a survey:</u>

1. Click **Add From Library**. The **Course Survey** screen appears.



2. Search for and select a survey that has been added in the Items Library to add to the Course and then click **Save Changes**. The survey appears in the Survey List.



3. Click the drop-down arrows to re-order the questions or click the Delete icon to remove a question.
4. Click **Save Changes**. The survey is sent to each participant automatically once he or she has completed all the cases/scenarios in the Course.

IMPORTANT! Click **Save All** to save all sections on the course activity page.

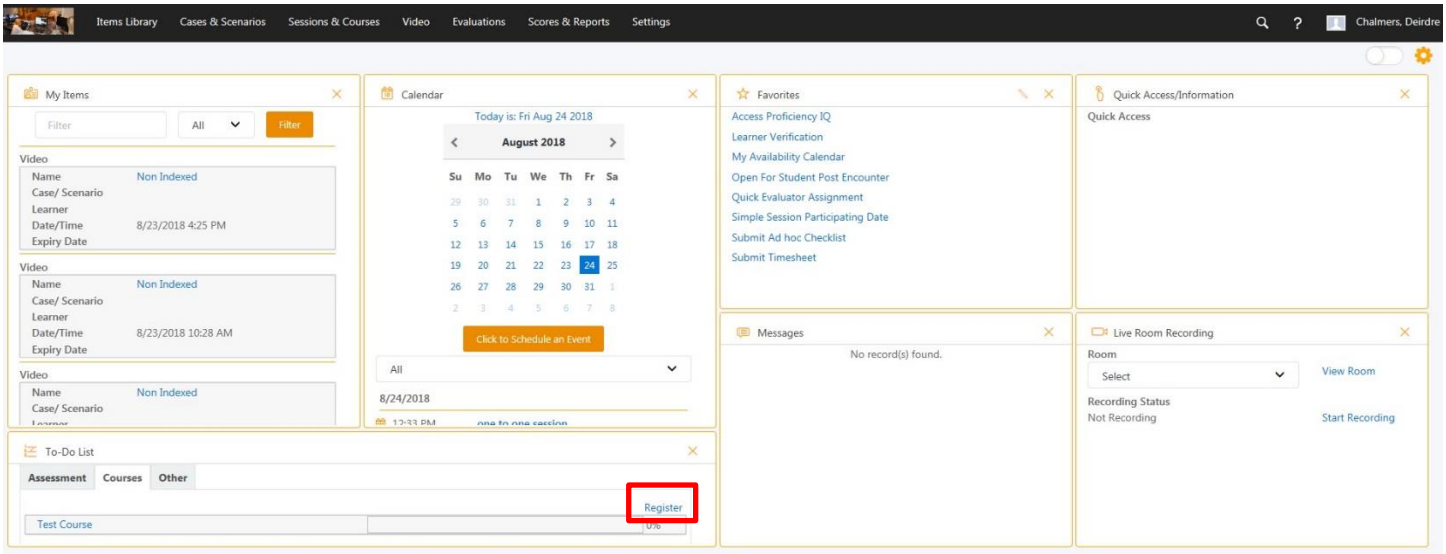
Course Search Options

To access the **Course** search options, click **Sessions & Courses** and then click the **Search** tab.

Search by Course Name and or Date Range and then click **Search**. The search results appear in the grid.

- Click the **Course Name** to access the Course activity page.
- Click the **Copy** icon to copy the Course, including all cases. ***Note:*** The participants, sessions and survey will not be copied.
- Click the **Delete** icon to delete the Course. ***Note:*** You cannot delete the Course if there are existing responses.

Participant Course Registration

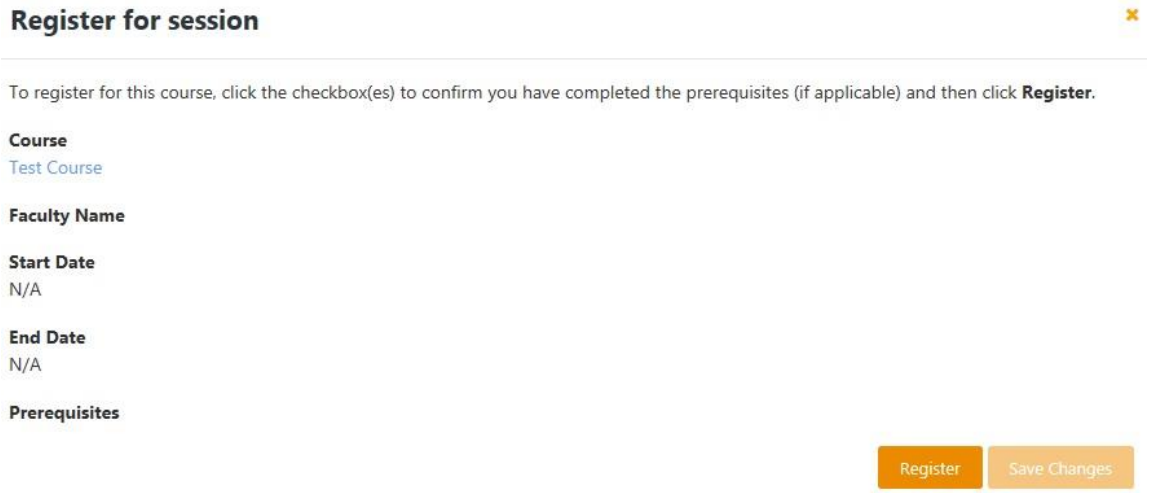


Participants can log in to SIMULATIONiQ Enterprise and:

- Register for a course from the To Do List > Courses tab.
- Unregister for a Course from the To Do List > Courses tab.
- View the status of Course completion from the To Do List > Courses tab. ***Note:*** The progress bar is generated by dividing the total number of cases and scenarios attended by the total number of cases and scenarios in the course.
- Complete a Survey from the To Do List.

<u>To register for a Course:</u>

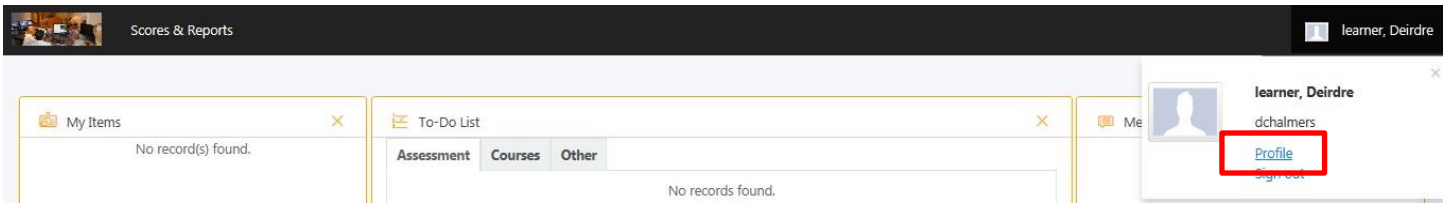
1. In the **Courses** area, click the **Register** link next to the course for which you wish to register. The **Register for Course** screen appears.



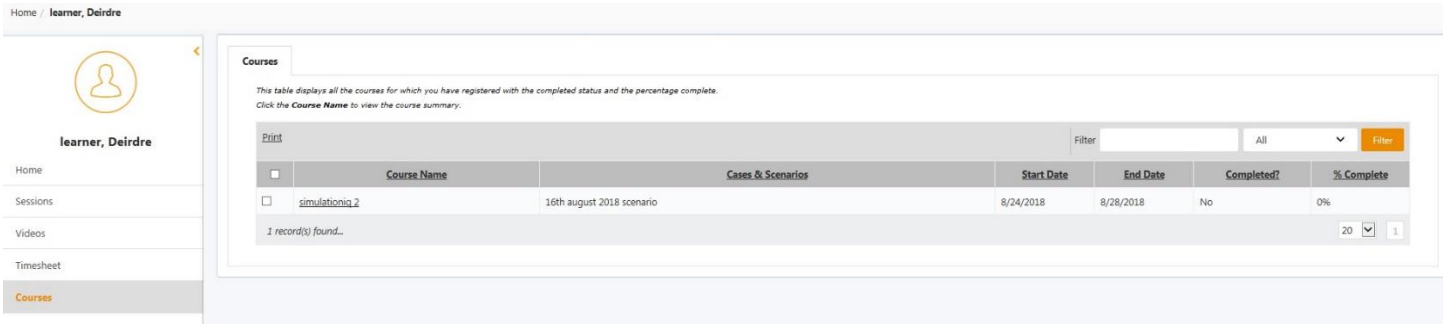
2. Click the checkboxes to confirm that you have completed the prerequisites (if applicable) and then click **Save Changes**. ***Note***: All prerequisite checkboxes must be clicked to enable the Register button.

3. Once all prerequisites have been completed, click **Register** to register for the Course.

To view the Participant Course Summary:



1. Click your user name in the upper right and then click Profile**.**
2. Click **Courses** from the tool belt.

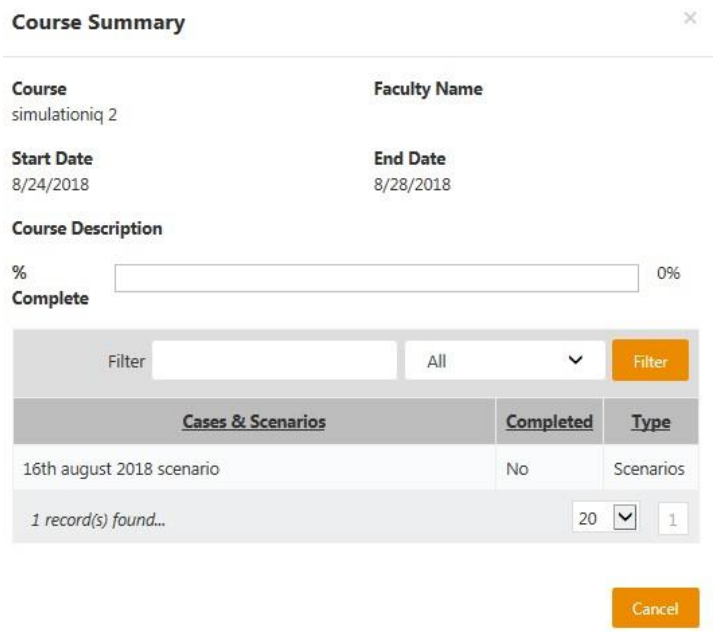


3. The grid displays all the courses for which you have registered with the completion status and the percentage complete.

Note: An email notification is sent to the participant when he or she has completed all the cases and scenarios in the course:

Email Notification	Sent When
Course has been completed *The **Course Completion** email template must be in Active status in Settings.*	Sent to the participant when all the cases and scenarios in the course have been completed.

4. Click the **Course Name**. The **Course Summary** appears.



The **Course Summary** displays all cases and scenarios that are part of this course and the completion status.

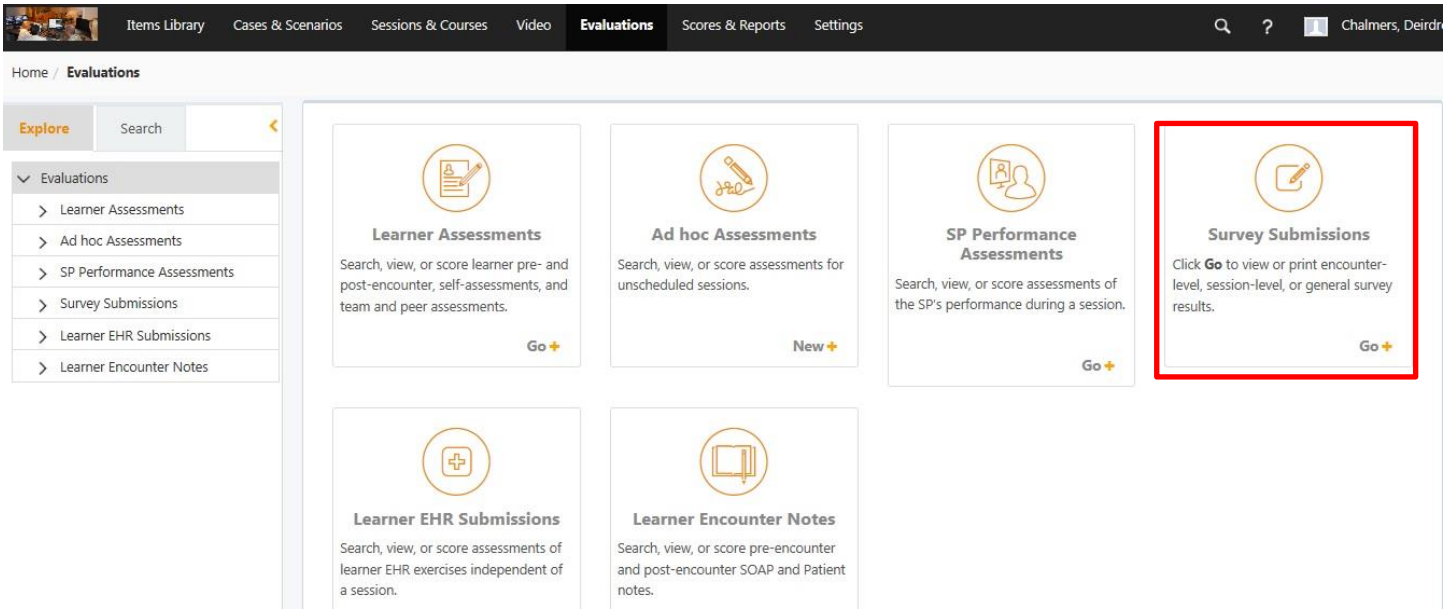
Gaining Credit Toward Course Completion

1. A participant is given credit for attending a case or scenario that is part of the course by:
    a. Being assigned to a Session in which the case/scenario is scheduled or scheduling themselves to an Open – Student Self Registration session, and
    b. Attending the session.
2. Credit is given once the session in which the learner is enrolled starts.

To complete the Participant Course survey:

1. From the **To Do List**, click the **Survey** link.

Survey Submissions



The Administrator and Educators can click **Evaluations** > **Survey Submissions** to access submitted Course surveys.

Email Notifications

Email notifications are sent when:

Email Notification	Sent When
Course is open for registration *The **Course Open** email template must be in Active status in Settings.*	Sent to the participant when he or she is added to the course.
Course has been completed *The **Course Completion** email template must be in Active status in Settings.*	Sent to the participant when all the cases and scenarios in the course have been completed.

Reports

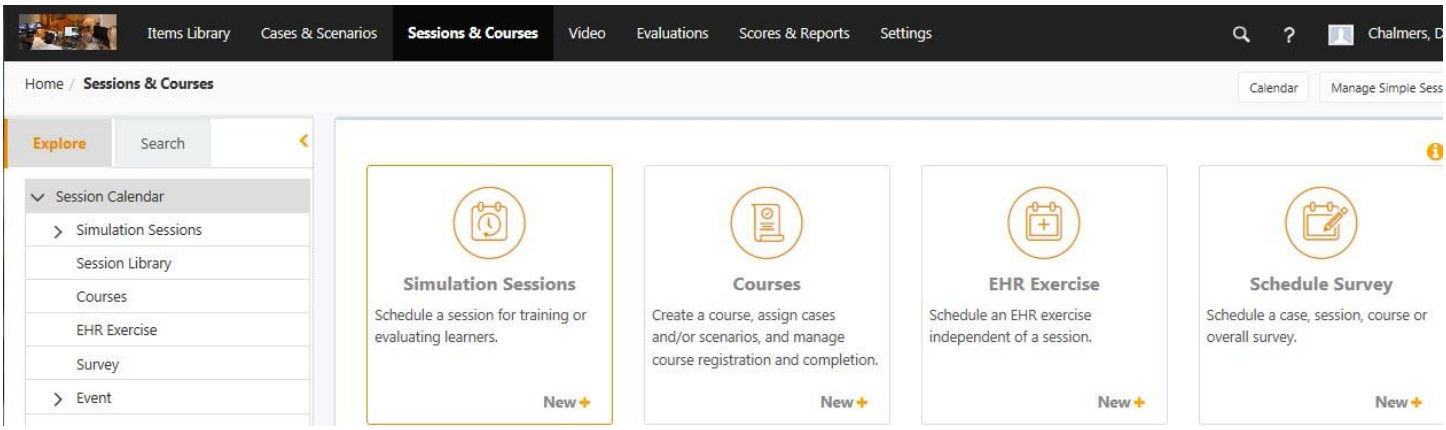
Use the following reports to review Course registration and completion status:

1. To access the **Course** report, click **Scores & Reports** > **Other Reports > Course Status**.

Report Type	Description
Registration Status	Displays the following for either a selected course or all courses: • Course Name • Learner ID • Learner Name • Learner Group • Registered • Registration Date
Completion Status	Displays the following for either a selected course or all courses: • Course Name • Learner ID • Learner Name • Pending Cases • % Completed

Schedule a Session

Participants receive Course credit when attending any Session that has the case or scenario associated with the Course. To create a Session, complete the following steps:

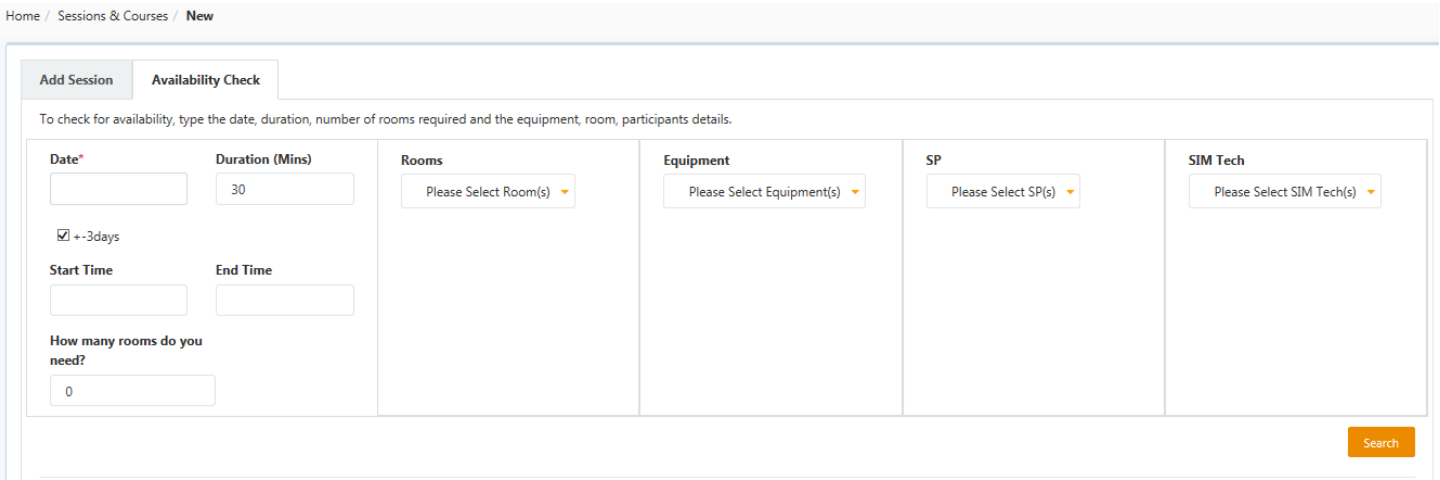


Create a New Session

To create a session, either:

- Double-click a date and time from the calendar or
- Click **Sessions & Courses > Simulation Sessions > Add New**
- Click the **Copy** icon next to an existing session

Session Availability Check



Use the optional Session Availability Check when creating a new session. Enter search criteria to identify room, equipment, SP and SimTech availability prior to scheduling a session.

Date time	Duration (Mins)	Room	Equipments	SP	SIM Tech	Action
8/3/2017 9:00 AM	30	ROOM 2- 5220 Cams	Code Cart-CC	qaadmin ems		New +

Other days that matches your criteria:

Date time	Duration (Mins)	Room	Equipments	SP	SIM Tech	Action
8/4/2017 9:00 AM	30	ROOM 2- 5220 Cams	Code Cart-CC	qaadmin ems		New +

- Session availability appears + or – 3 days.
- Click New + to create a session based on the results of the Availability Check.

Add Session

Add Session | **Availability Check**

To create a new session, type the session name, select the session type and a preferred time. Sessions marked as **Training session only** can be deleted even after the training session has been scored. Select a **Room Group** to limit the type of rooms available for this session. Click **Create Recurring Session** to create a series of sessions. Click **Copy Session** to copy an existing session. Click **Create** to define the session.

Enter the amount of time needed in the **Duration** field to reserve the room on the Session Calendar. If there are multiple encounters, make this the sum of all encounters.

Session Name*

☐ Is Training Session

Session Type* Select

Status* Scheduled

Start Date* 8/24/2018

Start Time* 5:04 PM

Duration* Mins

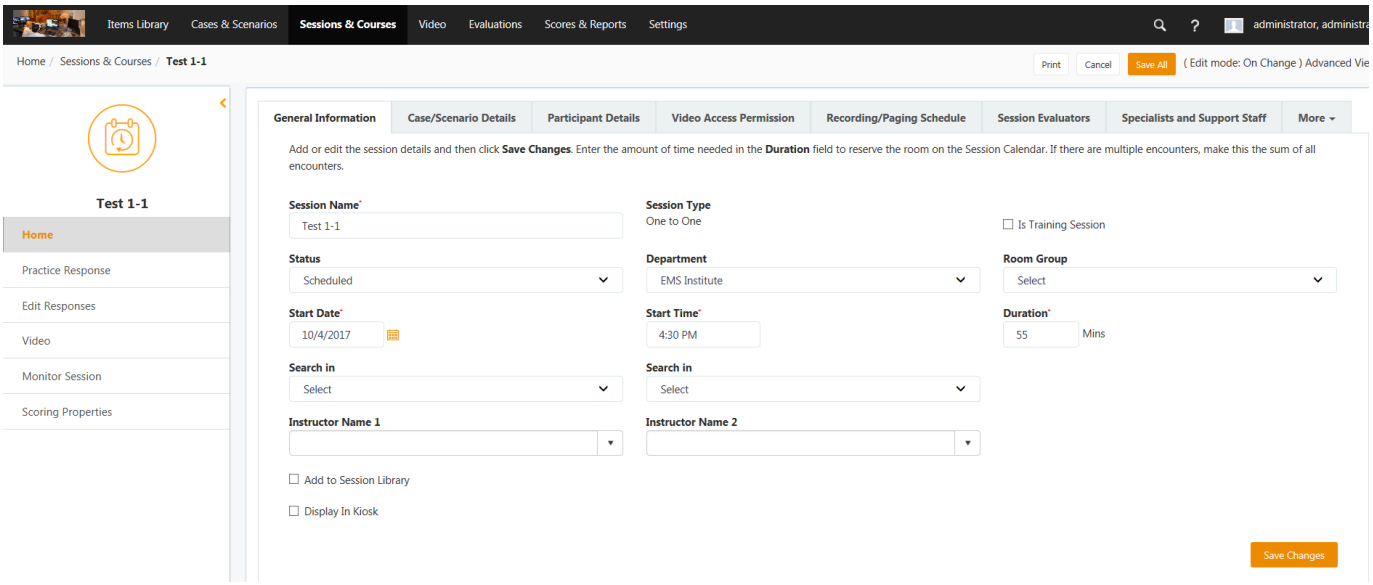
Room Group All

☐ Create recurring session

Create

1. Enter the **Session Name**.
2. In the **Start Date** and **Start Time**, add the preferred start date and time.
3. Click the **Room Group** drop-down to filter your room list by group. (optional)
4. Click the drop-down to select the **Session Type**.
5. Accept **Scheduled Status** or change to Pending if session requires approval for scheduling.
6. In the **Duration field**, enter the number of minutes to reserve the room.
7. Click **Create**.

General Information

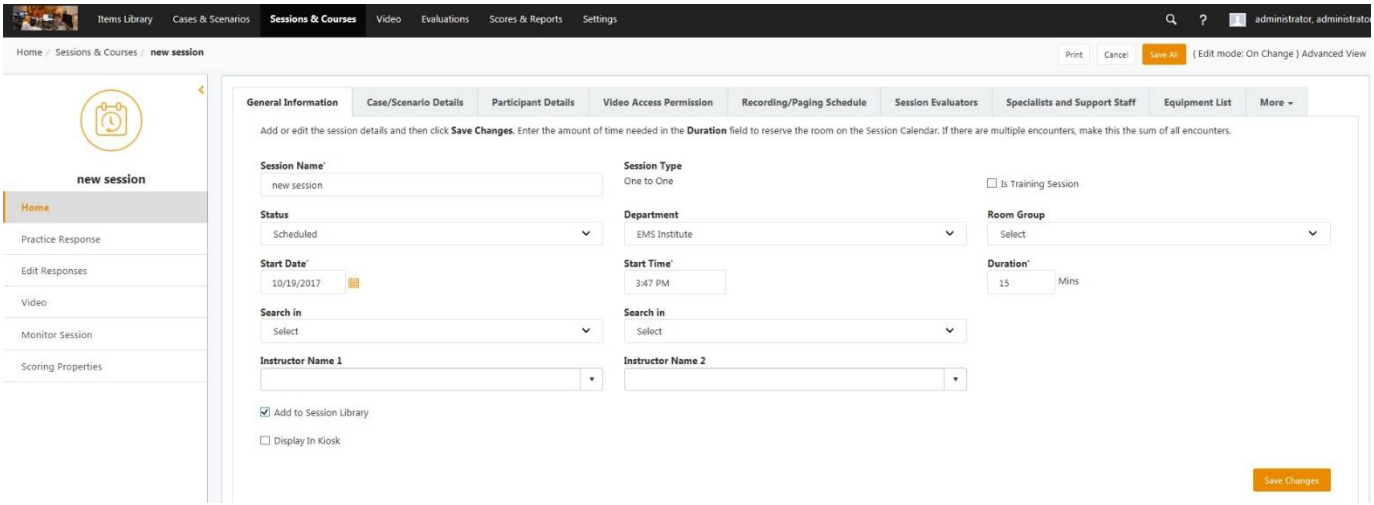


1. Complete the following fields:

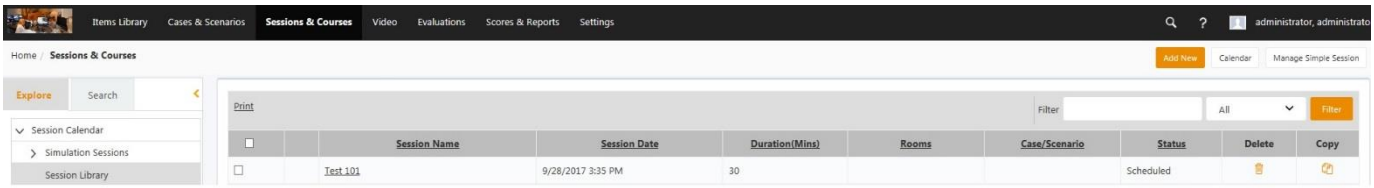
Field	Description
Department	Select the requesting Organization Unit. This is used for Utilization Reports.
Search in	Filter your search for the **Instructor Name 1** field below. Select the drop-down menu; choose Learners, SP, or Educator. Partially typing in the last name will trigger a list of names with that character set. Select the listing to add to the Instructor Name 1 field. Repeat if you would like to add a second requestor in the Instructor Name 2 field.
Add to Session Library	Click to mark a session as a template to create once and then easily locate and use again as needed to create a new session based on the template. See **Session Library** for more information.
Display in Kiosk	Click if you have purchased and want your session details to appear in the Kiosk.

2. Click **Save Changes**.

Session Library



When creating a session, click the **Add to Session Library** checkbox to mark a session as a template to create once and then easily locate in the **Session Library** and use again as needed.

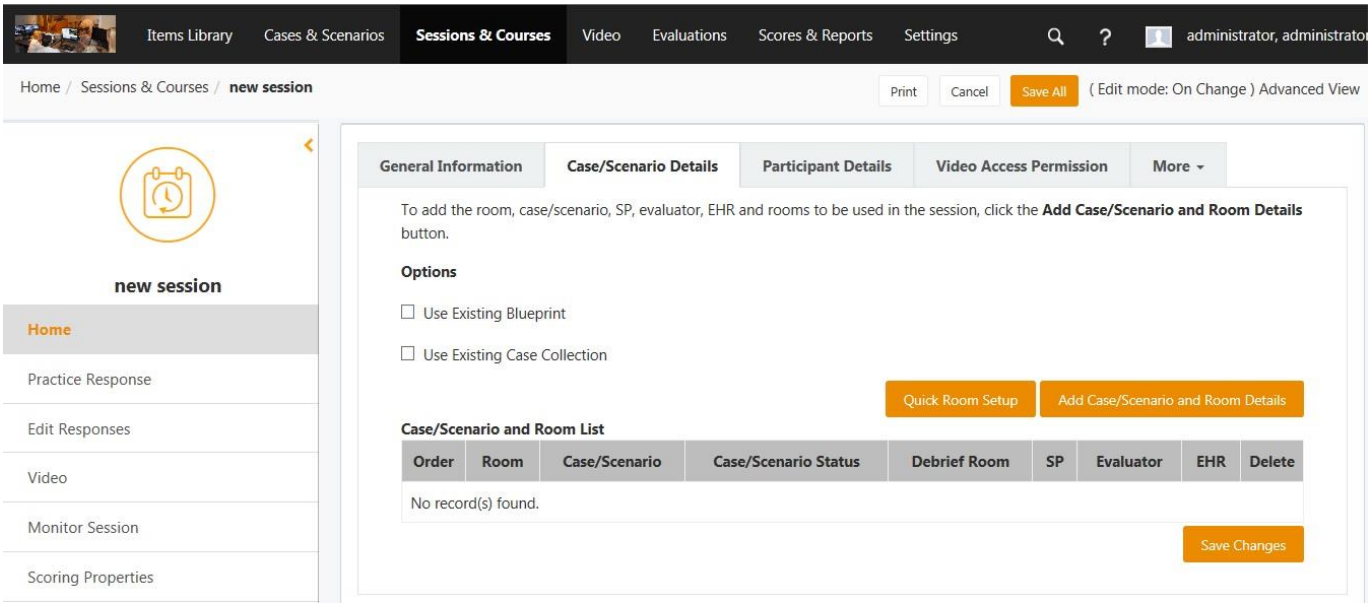


Sessions are displayed in the Session Library in read-only mode to eliminate changes to current sessions saved to the Session Library.

1. Click the Session Name to view the session in read-only mode.
2. Click **Copy** to duplicate and edit the session.

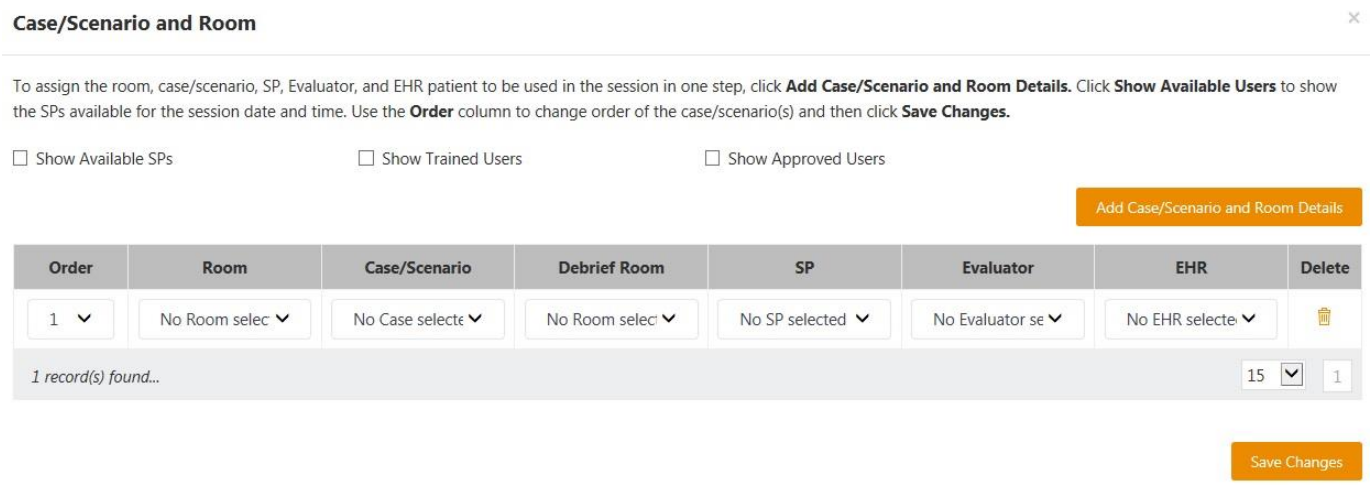
Case/Scenario Details

Select the Case or Scenarios used in the session as well as the rooms, evaluators, and SPs.



Field	Description
Use Existing Blueprint	A blueprint defines the sequence in which learners rotate through encounters within a session. Click the checkbox to either select an existing blueprint or add a new blueprint. See **Create a Blueprint** for more information.
Use Existing Case Collection	Click the checkbox to use an existing set of cases in the session. See **Case Collections** for more information.
Click either:	
Quick Room Setup	To schedule the case/scenario, evaluator(s), room(s) and SP(s).
OR	
Add Case/Scenario and Room Details	Assign rooms, Cases/Scenarios, SPs, evaluators, and EHR patients (if applicable.) Choose a primary evaluator and define the start and end time of a recorded session.

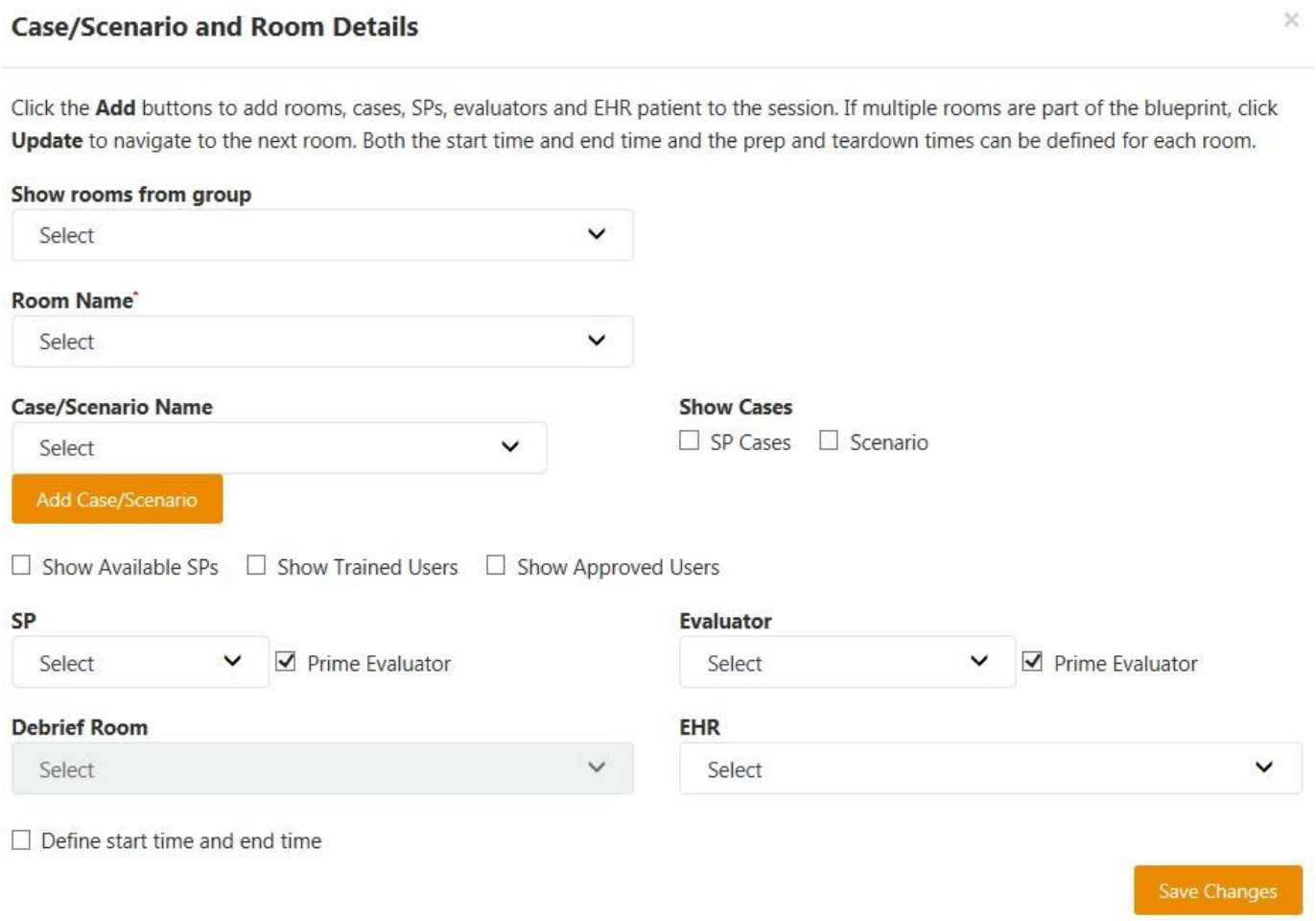
Quick Room Setup



Field	Description
Show Available SPs	Show only the users available for the session date and time. When available user is assigned, they will have the option to confirm their availability, which will be reflected in the **Case/Scenario and Room List** grid.
Show Trained Users	Show only the users who have been trained for this case/scenario in the **Trained Participants** module on that case/scenario's activity page Tool belt.
Show Approved Users	Show only the users who have been trained and approved from the **Trained Participants** module on that case/scenario's activity page Tool belt.

1. Click **Add Case/Scenario and Room Details**.
2. Select the **Room, Case/Scenario, Debrief Room, SP, Evaluator**, and **EHR patient** (optional).
3. Click **Add Case/Scenario and Room Details** to add more rows.
4. Use the **Order** column to change the order of the case/scenarios.
5. Click **Save Changes**.

Add Case/Scenario and Room Details



1. Select the **Room** and the **Case/Scenario**.
2. Select the following:

Field	Description
Show Available SPs	Show only the users available for the session date and time. When available user is assigned, they will have the option to confirm their availability, which will be reflected in the **Case/Scenario and Room List** grid.
Show Trained Users	Show only the users who have been trained for this case/scenario in the **Trained Participants** module on that case/scenario's activity page Tool belt.
Show Approved Users	Show only the users who have been trained and approved from the **Trained Participants** module on that case/scenario's activity page Tool belt.

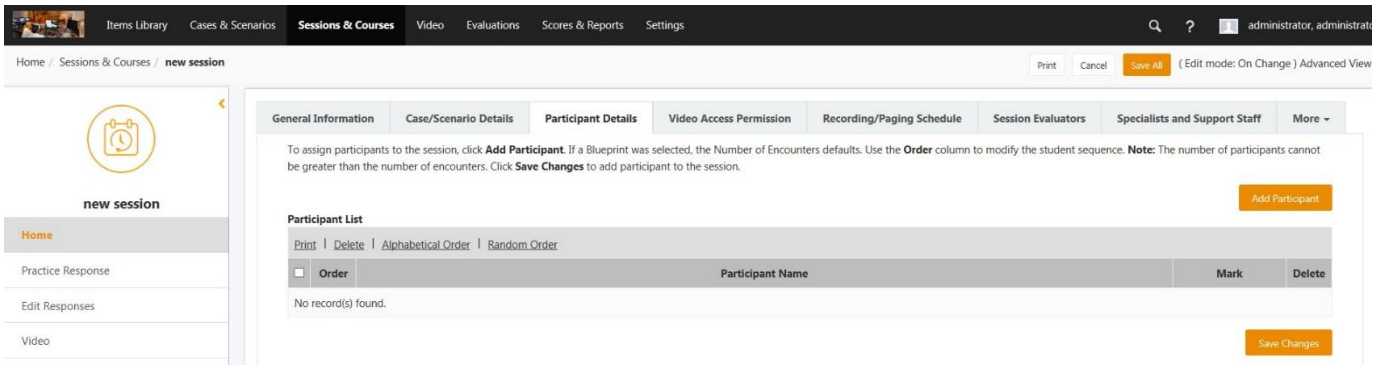
3. Click the checkboxes to make the SP and/or Evaluator the **Prime Evaluator**(s).
4. Click the **Define start and end time** checkbox to add the session times, preparation time and teardown time.

Participant Details

For an Open Student Self-Registration Session – Click **Add Learner Group** and select the Learner Groups of whose members can register. Add the maximum number of students per learner group. Click **Save** and then input the maximum number of total learners that can register. Add Open and Close Registration dates to set a time restriction, or leave blank for an unrestricted timeframe.

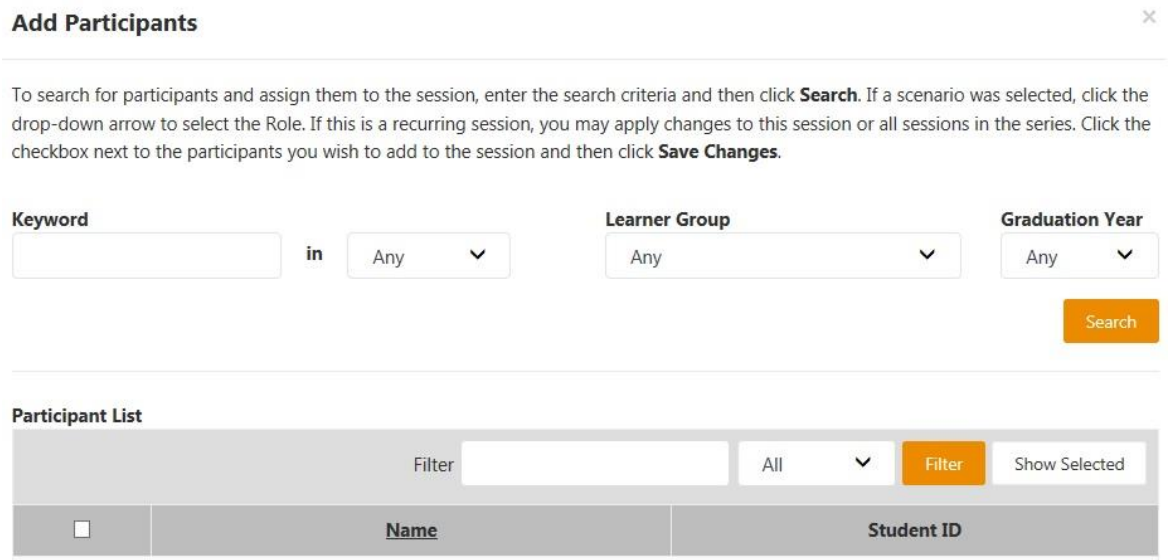
For a Simple Session – Click the **Add Participant** button. Click and then either click the **Add Learner Group** button and select the Learner Groups whose members can attend and/or individually select the learners for this session.

Note: If a blueprint was selected, the number of rows in the grid defaults to the number of encounters specified by the blueprint.



Note: When assigning and saving the Learner(s) a window appear listing the SPs the learners have met with previously.

1. Click **Add Participants**.

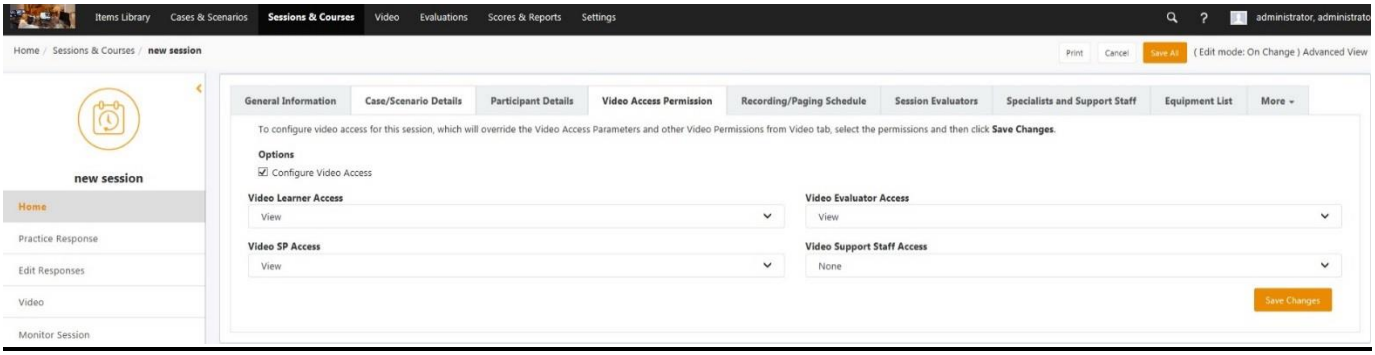


1. To search for participants and assign them to the session, enter **the search criteria** (Learner Group, Graduation Year, Student ID, or by Keyword) in either of the **Search** fields.
2. Click **Search.**

3. Click the **checkbox** next to the participants you wish to add to the session.
4. If a **scenario** was selected, click the drop-down arrow to select the Role that learner will portray.
5. If this is a **recurring session**, you may apply changes to this session or all sessions in the series.
6. If this is a Team Session, check the checkboxes next to the learners to add to the encounter, designate any roles for each to portray if applicable, then assign a name for the **Team Name***. The team name is a way to identify that group of learners in a session. Example: Team 1, First Group, etc.

Video Access Permission

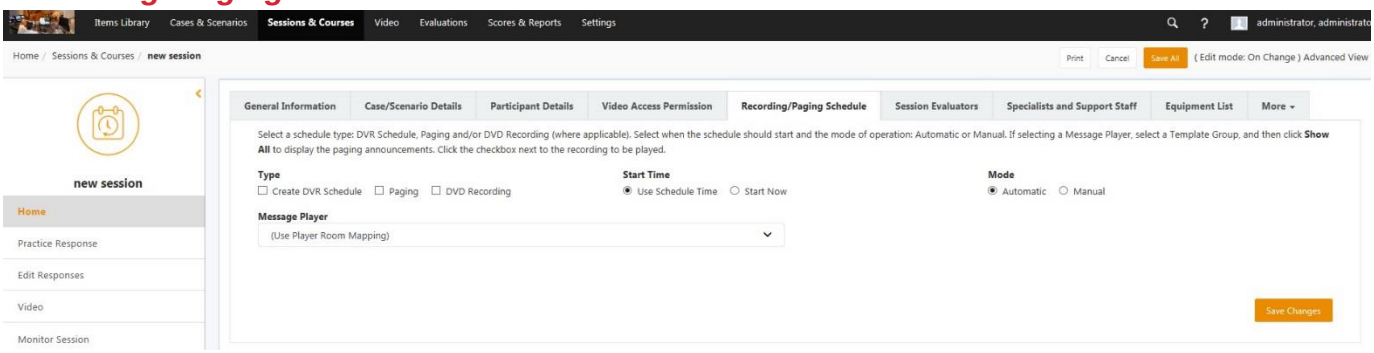
Video Access permissions may be set at the session level for Learners, SP's, Evaluators and Support Staff, which will override the Video Access Parameters and other Video Permissions from Video tab.



Note: Changes to video access permissions will not affect completed sessions.

1. Click the **Configure Video Access** option.
2. Select **View, Download** or **None**.
3. Click **Save Changes**.

Recording/ Paging Schedule

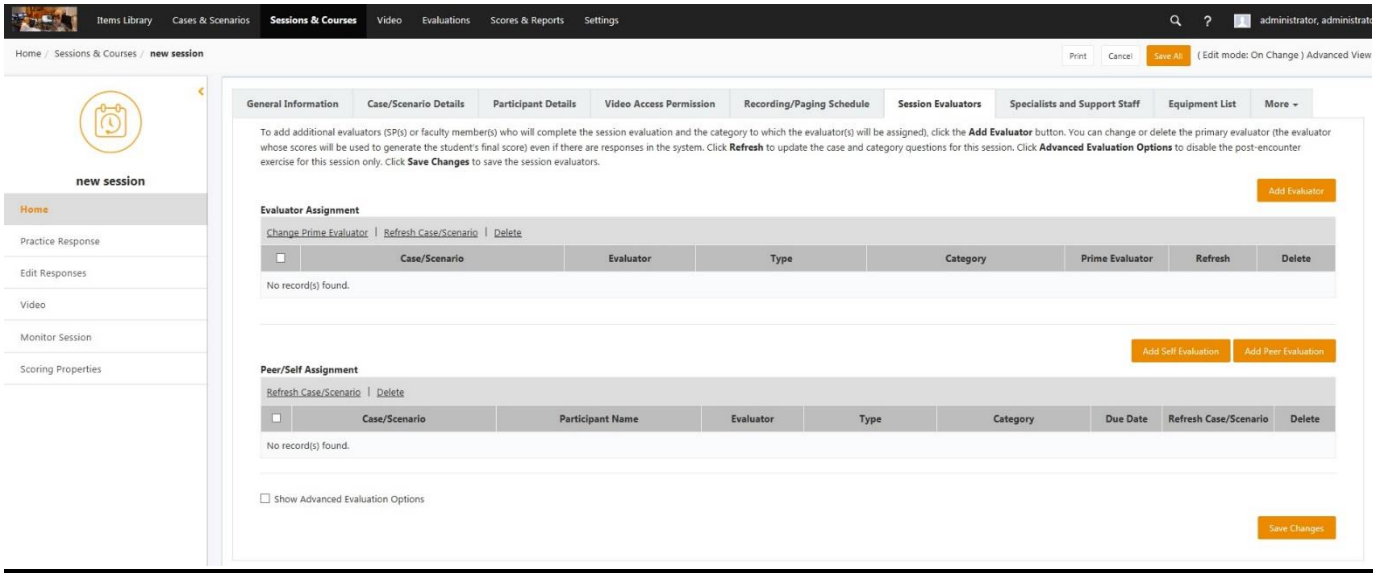


Field	Description
Type	
Create DVR Schedule	Click the checkbox to send the session recording to the video recorder.

Paging	Click the checkbox to select a Paging announcement.
DVD Recording	Click the checkbox to make a recorded file that will play on a DVD player (only if included with your installation—optional equipment).
Start Time	
Use Schedule Time – Automatic Mode	Session runs automatically based on session start time.
Use Schedule Time – Manual Mode	Start the session at the defined time and manually start the recording for each encounter. The encounters will stop automatically at the end of the defined recording time; however, you can stop manually *before* the recording is scheduled to stop.
Mode	
Start Now – Automatic Mode	Start now and run automatically from this time on. The recording will stop at the end of the defined recording time without any need for user intervention.
Start Now – Manual Mode	Start session immediately and click Start to start manually. The recording will automatically stop at the end of the defined recording time; however, you can stop manually *before* the recording is programmed to stop. (You will be able to toggle back and forth between automatic and manual in the session).
Message Player	Select the player to play the paging announcements for the session.

2. Click **Save Changes**.

Session Evaluators



Evaluator Assignment
• Click **Add Evaluator** to add an SP or Educator to complete the session evaluation. • Click the **Change Prime Evaluator** link to change or delete the primary evaluator (the evaluator whose scores will be used to generate the student's final score) even if there are responses in the system.

- ***Note***: The Prime Evaluator's responses will be used to calculate the final score; the QA Evaluator's responses will not.
- Click **Refresh Case/Scenario** update any question and category changes made at the case/scenario level after the session has been scheduled.

Peer/Self Assignment

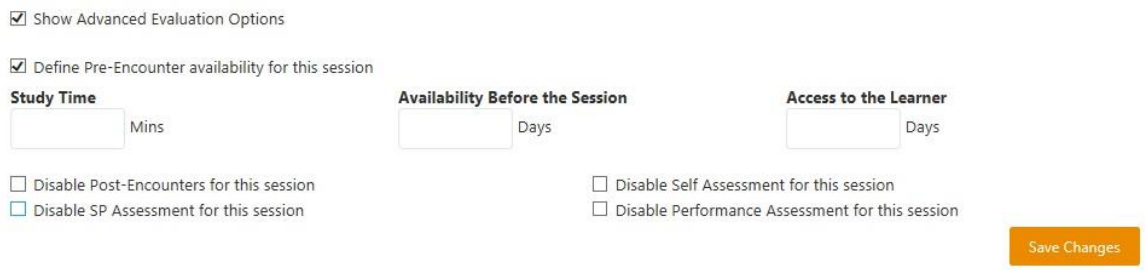
Click **Add Peer-Evaluation** to add a Peer-Evaluation for another user to assess the Learner's performance.

The **Learner Self-Evaluation** must be created at the session level in this section or else it will not appear on the learner dashboard to be completed after the session.

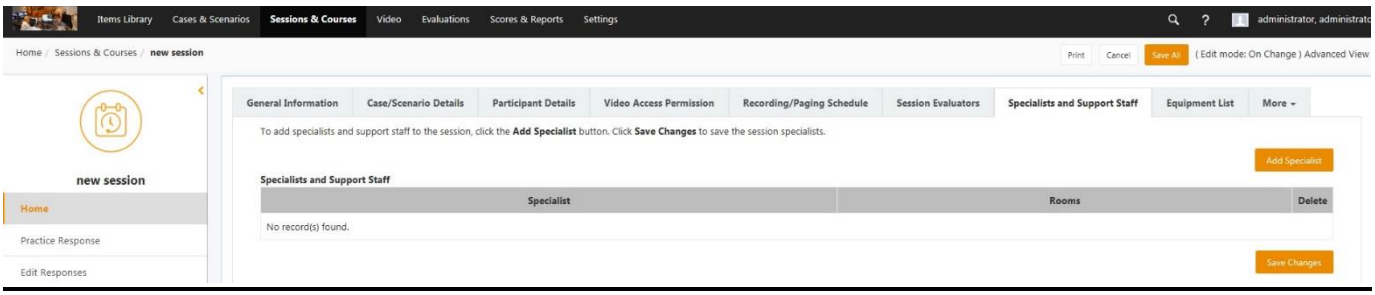
Advanced Evaluation Options

Click **Show Advanced Evaluation Options** to:

- Define the pre-encounter availability for this session
- Disable the post encounter for this session
- Disable the SP assessment for this session
- Disable the self assessment for this session
- Disable the performance assessment for this session

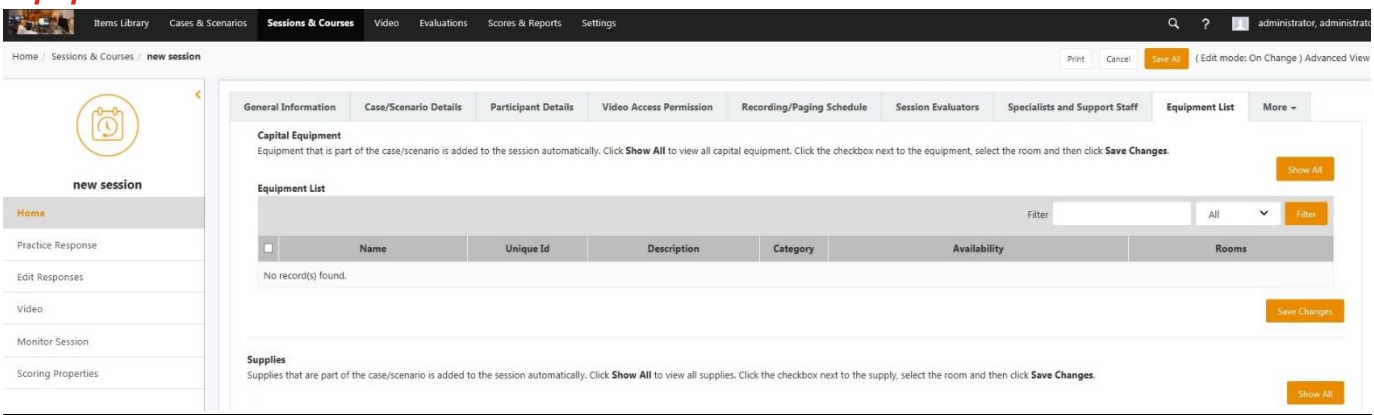


Specialists and Support Staff



1. Click **Add Specialist** to add specialist or support staff functions to the session.
2. Click **Save Changes**.

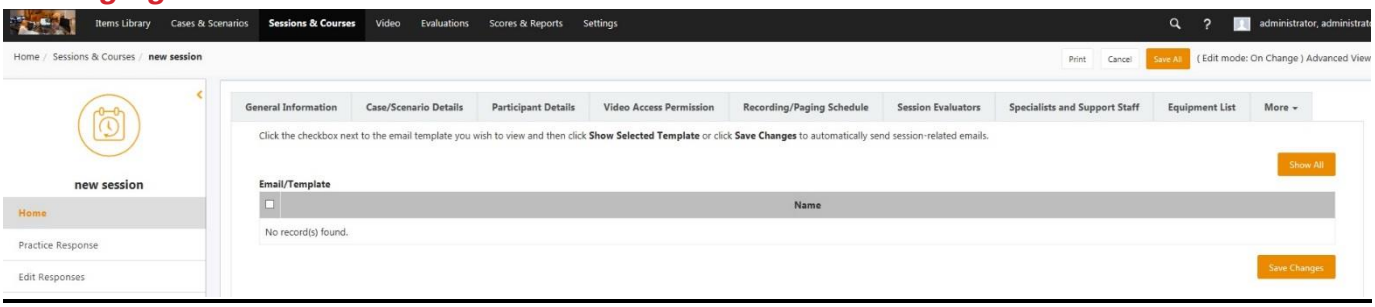
Equipment List



Equipment that is part of the case/scenario is added to the session automatically.

1. Click **Show All** to view all capital equipment, drugs and supplies.
2. Click the checkbox next to the equipment, select the room and then click **Save Changes**.

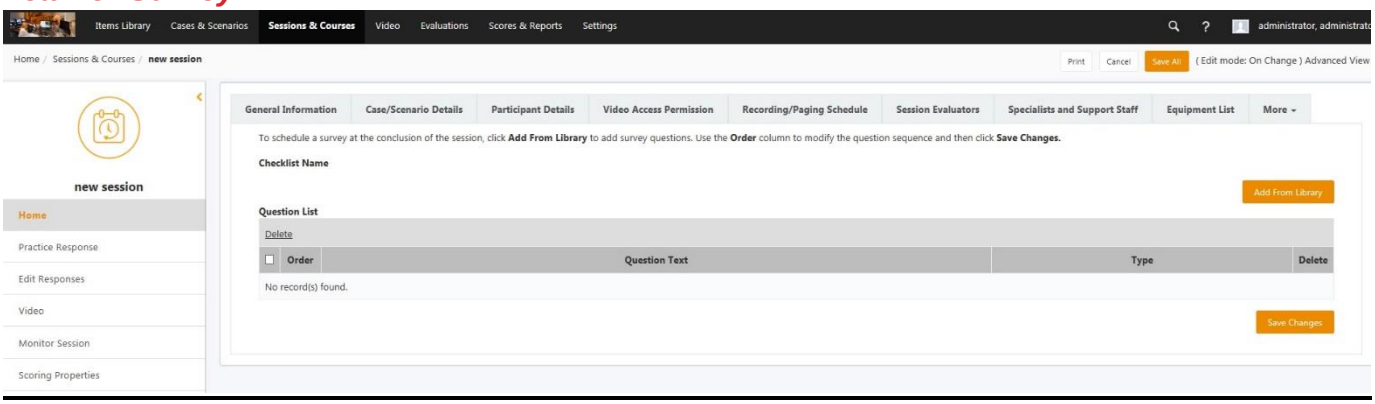
Messaging



System-generated session emails are sent by default.

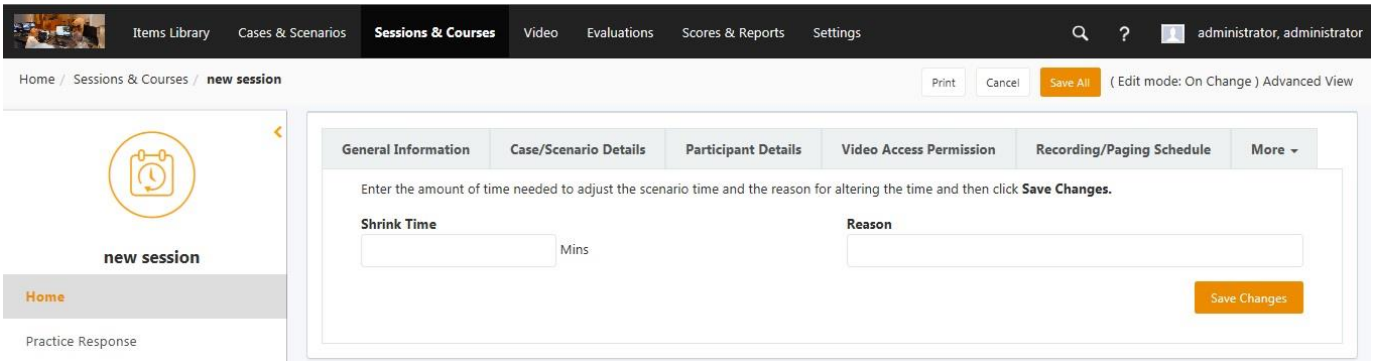
1. Click **Show All** and then click the Custom Email checkbox to send a custom email for this session and then click **Save Changes**.

Learner Survey



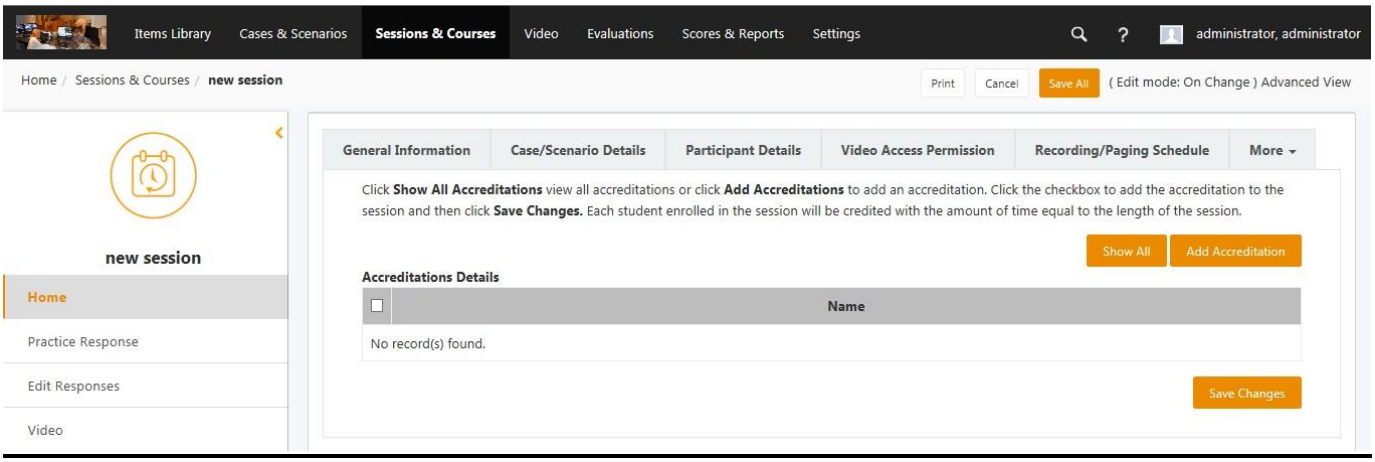
1. To schedule a survey at the conclusion of the session, click **Add From Library** to add survey questions.
2. Use the **Order** column to modify the question sequence.
3. Click **Save Changes**.

Shrink Details



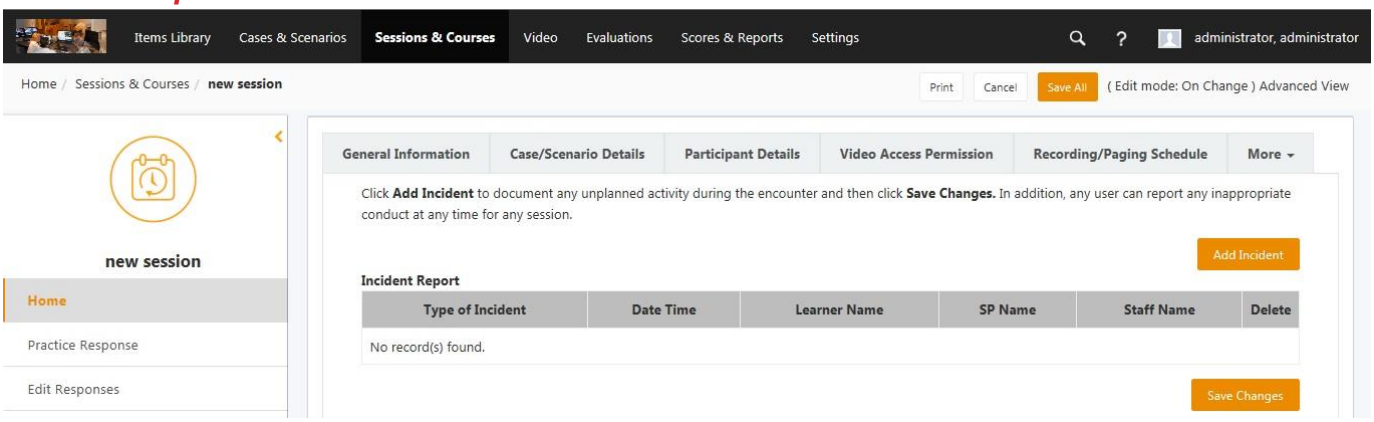
1. In the **Shrink Time** field, add the difference between the actual recording time and the encounter time indicated on the Case/Scenario Activity page.
2. Add the **Reason** for adjusting the time.
3. Click **Save Changes**.

Accreditation Details



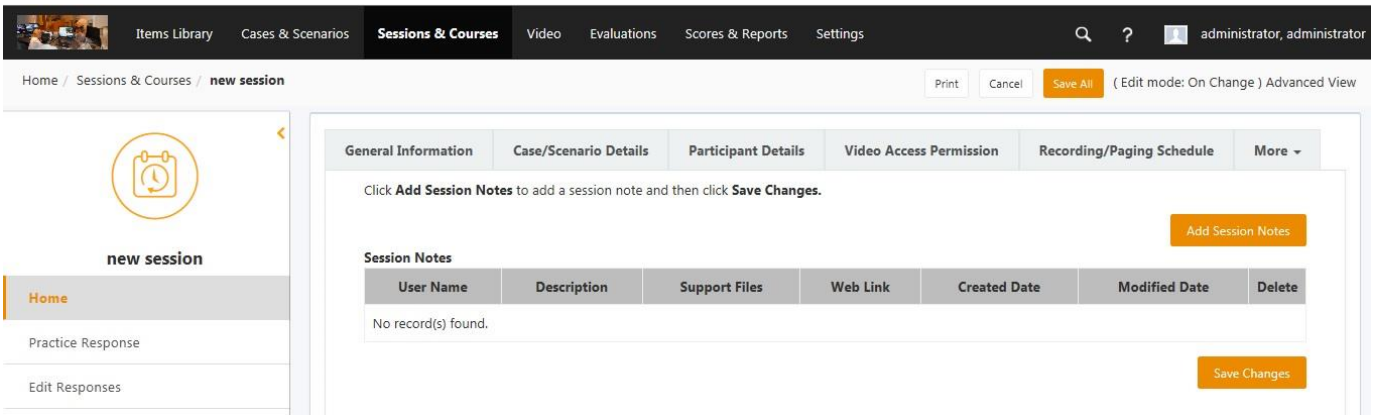
1. Click **Show All** or click **Add Accreditation** to associate the session with an accreditation. Each learner in the session will be credited with the amount of time equal to the length of the session.
2. Click **Save Changes**.

Incident Report



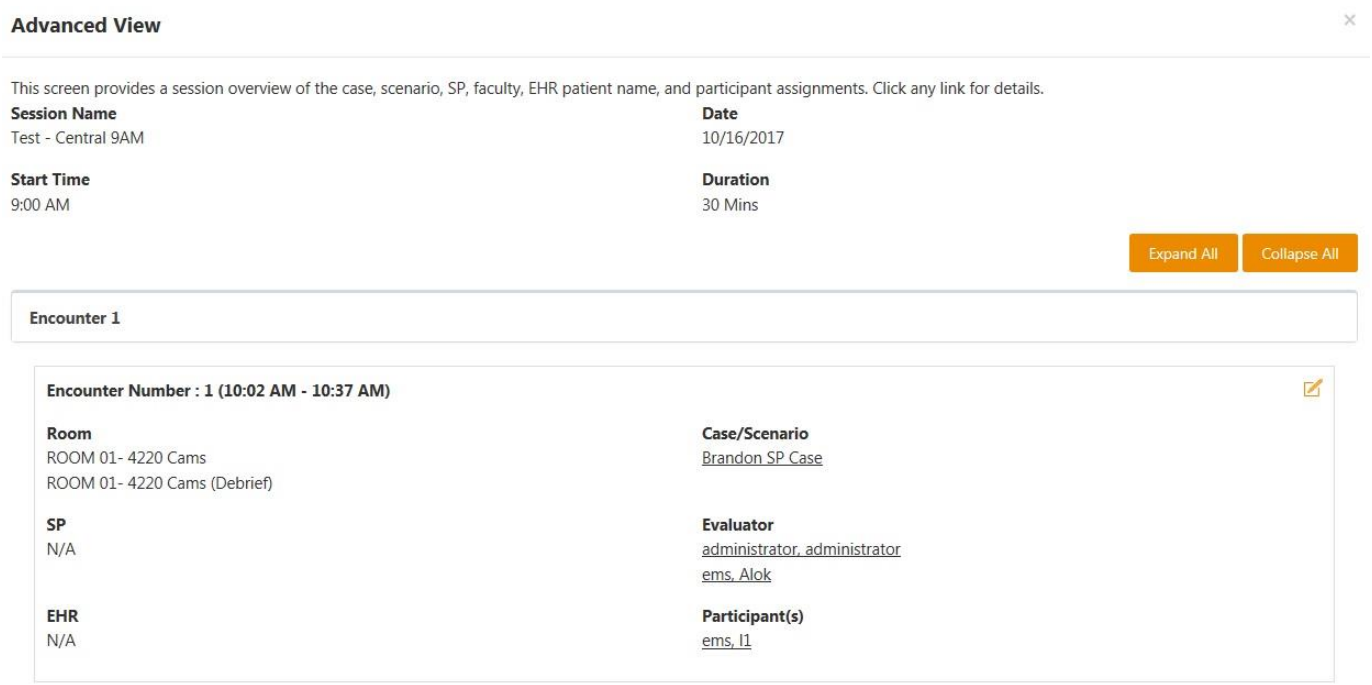
1. Click **Add Incident** to document any session activity that could impact scoring or to report any inappropriate conduct.
2. Click **Save Changes**.

Session Notes



1. Click **Add Session Notes** to add notes and/or support files to view from the Session Summary pop-up on the Center Calendar.
2. Click **Save Changes**.

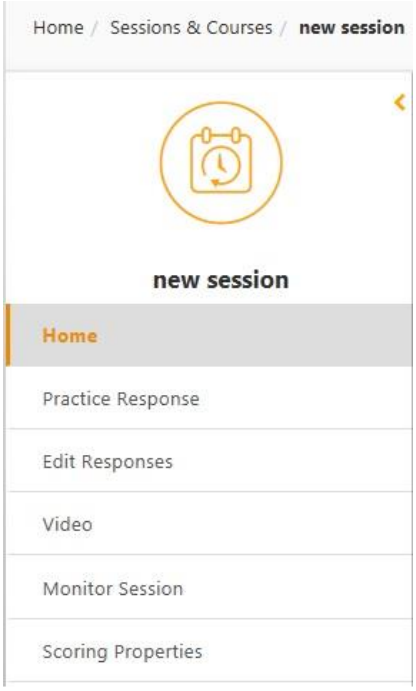
Advanced View



1. Click **Advanced View** to display a session overview.
2. Click the edit icon to make changes to session information before, during, or after the session.

Toolbelt

Use the Toolbelt to access items directly related to this Session.



Link	Description
Practice Response	Preview and practice the checklist items that have been associated with the Case/Scenario. Scores are not collected in Practice mode.
Edit Responses	Administrator can make corrections to the evaluator's or learner's responses. This can also be done in the Evaluations module.
Video	View video recordings that have been indexed to this session.
Monitor Session	Provides an overview of the case/scenario, session time, rooms assigned, SP, faculty, EHR patient name, and the status of participant assignments. Click on the hyperlinks for details of that item just like the hyperlinks in the Advanced View work. The status of the recording and assessments are color coded. • **Red** – pending (if an assessment has been accessed but not submitted, it will show as Pending.) • **Green** – indicates submitted and completed status. • **Grey** – Indicates recording in Progress • **No Show** – Marking a learner as **No Show** will remove any assessments from the evaluator and that learner's dashboards. This also serves as a visual indication, so as not to delay the session that the learner will not be present. Or if already marked **No Show,** can **Unmark No Show**.

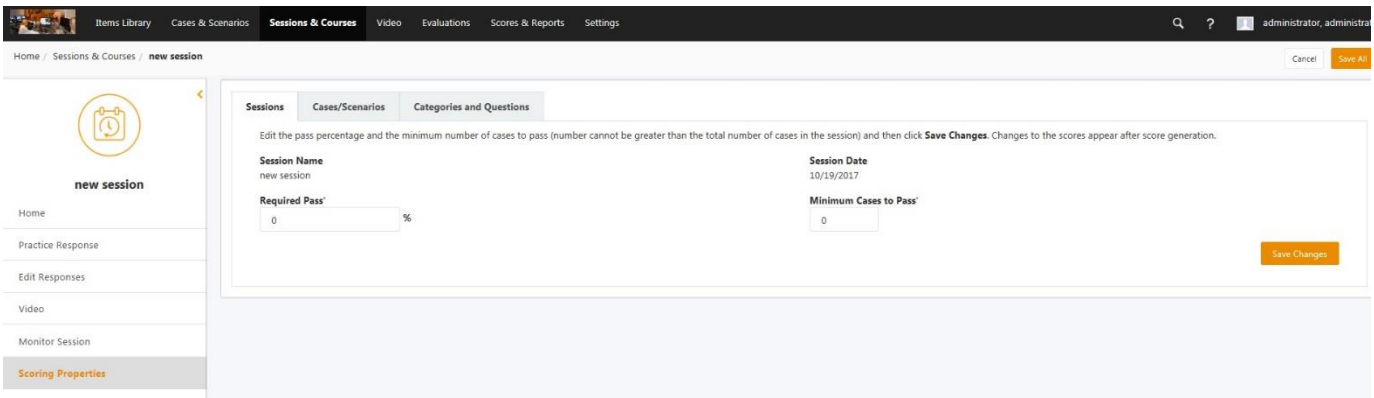
	• **Auto Refresh 30 secs** – Click this button to update the status of the session.

Scoring Properties

Change the scoring properties for this session only. The scores and weights changes do not affect the scores and weights in the original case or scenario.

IMPORTANT!

Scores can be changed here even after the encounters have been scored. If reports have been scheduled check the checkbox to "Regenerate Scores when data changes" checkbox, to send updated reports that reflect the changes in the scores.



Tab	Description
Sessions	Edit the minimum percentage required to pass the session. If there are multiple cases scheduled in this session, add the number of cases required to pass in order to pass the session. If there is only one case or scenario scheduled, put "1" in the Minimum Cases to Pass field.
Cases / Scenarios	Select the Case or Scenario in the grid that you want to change the Required Percentage to Pass, the Weight or whether it is mandatory to pass this case or scenario in order to pass the session.
Categories and Questions	Select the Case/Scenario of the categories or questions scoring criteria you want to change by using the drop-down menu. In the **Checklist Type** drop down menu, **select the type of checklist to be changed** and then click the **Load** button, to load the questions and categories of that particular checklist. • Learner Pre-Encounter • Learner Post-Encounter • Performance Assessment • Learner Self-Assessment

	• SP Performance Assessment When you select any **Performance Assessment**, and then click on the **Load** button, the Category List grid will appear as well as the Question list grid. Select the item you want to edit and make your changes. **Save Changes.** When you select a **Learner Pre-Encounter**, the Questionnaire grid will display where you can make your changes. You can also change the order of the questions by selecting the number in the Order Column. **Save Changes**. When you select a **Learner Post-Encounter**, and then click the **Load** button, you will have the choice of displaying the Questionnaire, Note (Patient or SOAP), or the Computer Exercises. Select the hyperlink of the item you want to edit and make your changes. You can also change the order of the questions by selecting the number in the Order Column. **Save Changes**.