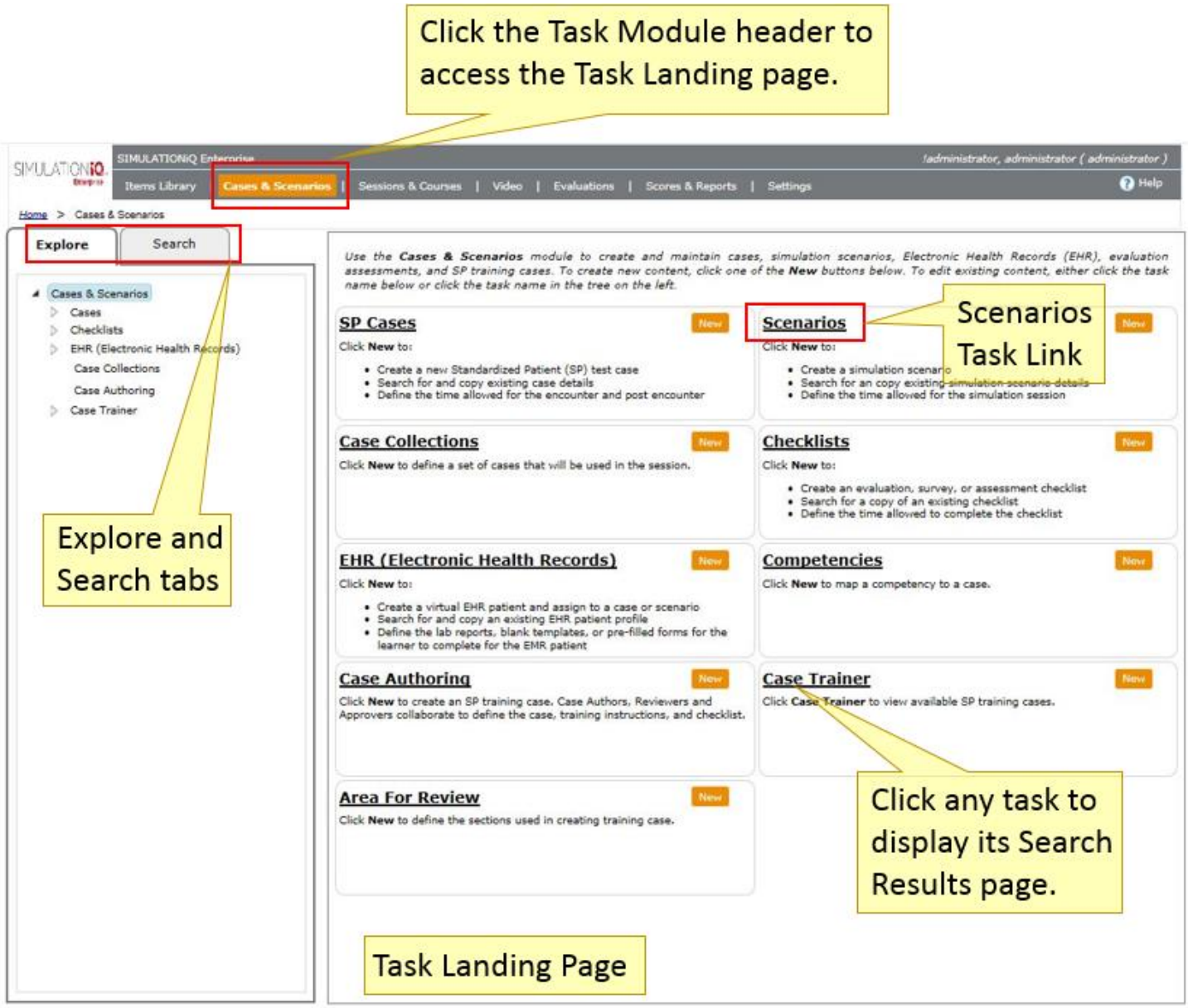
SIMULATIONiQ™ Enterprise

Cases and Scenarios

Education Management Solutions, LLC
436 Creamery Way, Suite 300
Exton, PA 19341
Phone: 877.EMS.5050 (877.367.5050)
www.SIMULATIONiQ.com

Contents

Cases and Scenarios



Cases and Scenarios Tasks Page

Use the **Cases and Scenarios Module Header** to access the Cases and Scenarios **Task Landing Page**, Cases and Scenarios **Explore** and **Search** Tabs.

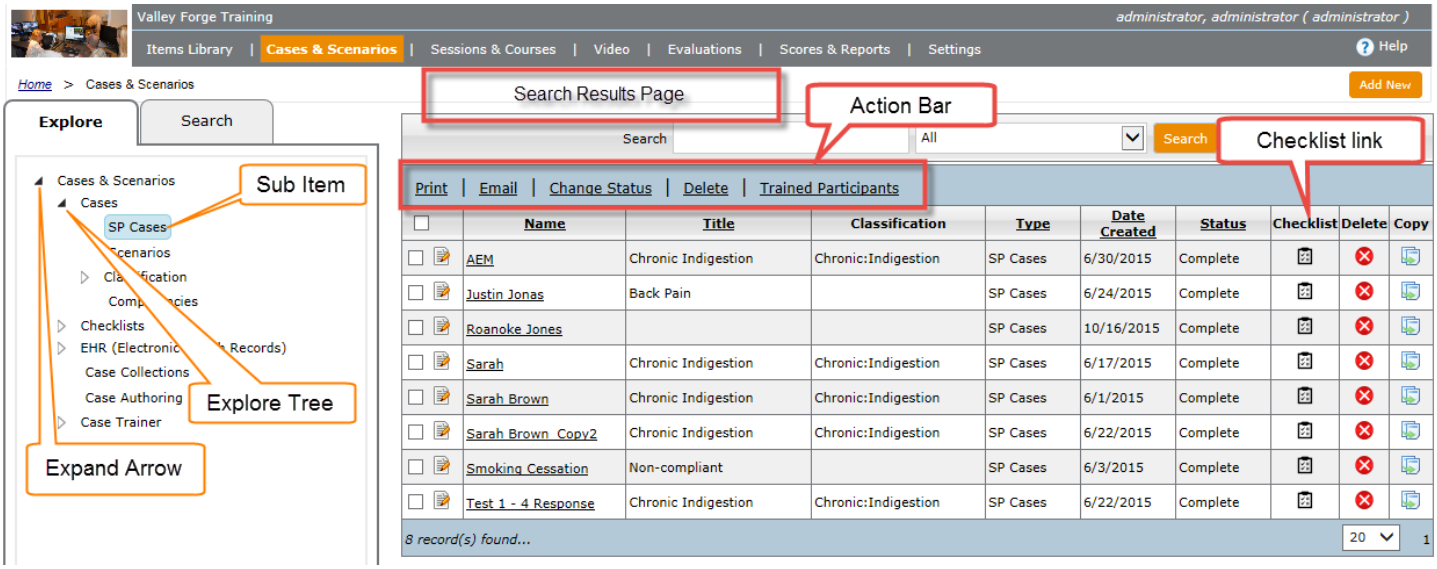
Cases & Scenarios tasks are functions relating to a case or scenario. Generally, a case is when a learner meets with a Standardized Patient (SP) during an encounter while a Scenario is usually when a learner meets with a simulator (manikin) during an encounter. Use the Cases & Scenarios tasks to create, in detail, the

necessary activities needed to create and produce these encounters, as well as test the learners who participate in the encounter.

Cases and Scenarios Tasks on the Task Landing Page

- SP Cases
- Scenarios
- Classification
- Competencies
- Checklists
- EHR (Electronic Health Records)
- Case Collections
- Case Authoring
- Case Trainer
- Areas for Review

Explore Tab

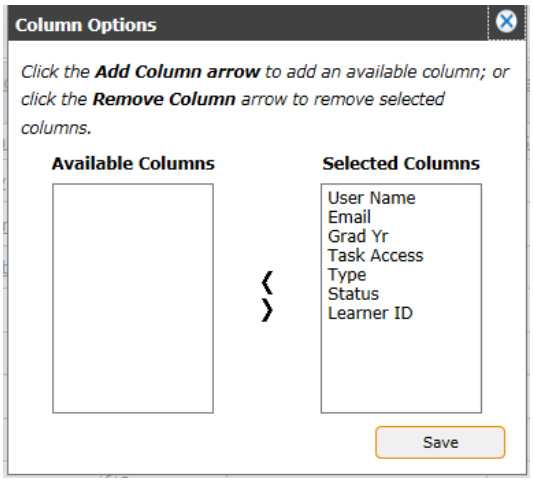


Use the **Explore Tab** to quickly navigate to specific Cases and Scenarios task features. When an **Item Header or Sub-item** is selected, the relevant information from the database will populate the **Search Results Page** to the right.

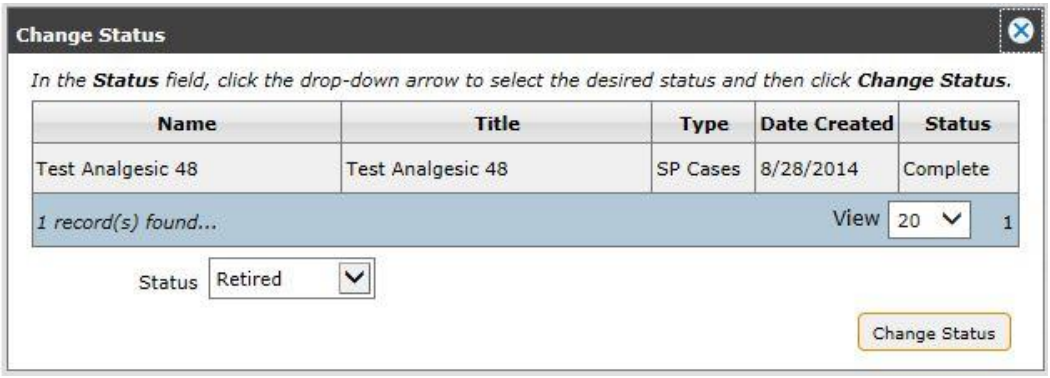
Note: The icon next to the case indicates that access restrictions have been enabled; click here for more information.

Note: At this time, you cannot create a case and a scenario with the same name.

Action Bar Items:



- **Column Options** – Add, remove and sort the order of the columns in grid view.
- **Print** – Click the checkbox next to the Case name and press **Print** to generate a hardcopy of the case details.
- **Email** – Click the checkbox and press **Email** to send the case details using your Email utility.
- **Change Status** – Click the checkbox and press **Change Status** to change the case status from Active to Retired, Complete, or Incomplete from the following dialog:



- **Delete** – Click the checkbox and press **Delete** to remove the case (press OK at the Confirmation dialog).
- **Trained Participants** – Click the checkbox and press **Trained Participants** to determine if participants have been trained in this case; the following dialog appears:

Trained Participants

Display the list of users trained to participate in the selected cases and scenarios.

Print

Case/Scenario	Title	Type	Participant	User Type
Athlete Injured Knee	ER Visit	SP Cases	3, SP	SP
Athlete Injured Knee	ER Visit	SP Cases	9, Educator	Educator
Athlete Injured Knee	ER Visit	SP Cases	Admin, Jill	Educator

3 record(s) found... View 20 1

- **Access Restriction** – Click the checkbox for one or more cases to view any access restrictions that apply; this functionality is enabled by selecting Yes at the "Enable User Access Security" parameter in Settings and then selecting whether or not access is Public, by Organization Unit, or Author-Only (this is set up by your Enterprise Support Administrator).

The following sample dialog appears:

Access Restriction

Click the checkboxes next to the Organization Units to grant the ability to view or edit the selected case(s).

Case List

Search All Search

Name	Title	Type	Date Created	Status
!broken leg	examination	SP Cases	4/25/2014	Complete

1 record(s) found... View 20 1

Organization Units

Search Search Expand All Collapse All

Organization Unit	View	Edit
⊟ SIMULATIONiQ Enterprise	☑	☑
⊟ Faculty Group	☐	☐
Psychology 101	☑	☑
⊞ Dept for Faculty	☐	☐
Another Unit	☐	☐

Save Changes Save & Close

Click View/Edit checkbox selections as necessary for your case. In the above example, this establishes Case View/Edit access for your primary Organization Unit and a particular sub-group within that Organization Unit.

Cases and Scenarios

► Clicking on the arrow to the left of an item in the **Explore Tree** expands the list to reveal its **Sub-items**.

► Clicking on the Cases & Scenarios link in the **Explore Tree** will bring you back to the **Task Landing Page**.

Cases

- **SP Cases** –Cases usually using Standardized Patients (individuals trained as patients) in an encounter portrayal.
- **Scenarios** – An encounter typically using a simulator (manikin as a patient)
- **Classification** – a filter that can be used to search for a case or scenario
- **Competency** - a skill set, a set of defined behaviors that provide a structured guide enabling the evaluation of behaviors in individuals.

SP Cases

- SP Cases usually use Standardized Patients (individuals trained as patients) in the encounter portrayal.
- When an SP Case is created and saved, it is then stored in the system's database.
- Clicking on this link will populate the **Search Results Page** with SP Cases already in the database.
- Cases can be searched, created, edited, status changed, deleted, copied, printed, and emailed from the SP Cases Search Results Page.

Scenarios

- A Scenario is commonly a learner encounter with a simulator (manikin as the patient).
- When a Scenario is created and saved, it is then stored in the system's database.
- Clicking on this link will populate the Search Results Pages with Scenarios already in the database.
- Scenarios can be searched, created, edited, status changed, deleted, copied, printed, and emailed from the Scenarios Search Results Page.

Classification

► A Classification acts as an additional filter when conducting searches for cases or scenarios. A Classification can be any category defined by the user to group cases or scenarios. Examples might be: programs of study, medical categories, acuity, age, gender, etc.

► If a Classification was designated in a case's or scenario's Activity Page, then it can be searched by classification.

► Click on the arrow next to Classification to expand the tree, revealing any Primary and Secondary Classification sub-items. Secondary Classification acts as an additional filter.

► Clicking on a sub-item will populate the Search Results Page with Cases and Scenarios that have a classification. Classifications can be searched, created, edited, status changed, deleted, copied, printed, and emailed from the SP Cases Search Results Page.

Competencies

► A **Competency** is used to measure a learner's proficiency of a particular skillset. A **Competency** is created in the **Items Library> Competencies** task. Then, in **Cases & Scenario > Cases > Competencies** specify a case that will be used to measure that competency along with the question(s) and category(ies) used to measure proficiency.

Checklists

► A **Checklist** is an evaluation tool used to assess the performance of a learner(s), or an SP during an encounter. They can be comprised of study documents, computer exercises, questionnaires and SOAP or Patient Notes. Checklists can also be used for a Survey, which is not graded, but the response data is collected in reports. A link to the checklist to be completed will appear on the recipient's dashboard when they log into the SIMULATIONiQ$_{TM}$ Enterprise system.

► A **Checklist question** may also be stored in the **Items Library** by creating the question and then clicking **Add to Items Library** button, so it will be available for use in any case or scenario.

► **Checklist task module** on the **Cases & Scenarios Task Landing Page**: Individual **Checklists** can be named, questions added to it, and saved. For example, if questions are frequently used for the same purpose, such as an exam or a particular case, then name the checklist accordingly, and add the questions that are commonly used for that exam or case. This is a convenient way to locate and reuse the questions that are part of that particular checklist when searching or adding questions from the **Items Library** into a **Case or Scenario's Activity Page**.

Checklist Sub-Items:

- Learner Pre-encounter
- Learner Post-encounter
- Learner Self-Assessment
- Survey
- Performance Assessment
- SP Performance Assessment – used in SP Cases, not scenarios

Learner Pre-Encounter

► Pre-Encounter questions are checklist items presented to the learner before the encounter. Checklists are applied to a case or scenario by attaching them to the Learner Assessment section of that case or scenario's Activity Page. Then, the learner will have the checklist link on their **Dashboard's To-Do List** when they log in.

► When a Learner **Pre-encounter checklist** is created (**Cases & Scenarios > Checklists**) and saved, it is then stored in the system's database.

► Clicking on this link will populate the **Search Results Page** with **Learner Pre-encounter** questions already in the Checklist database.

► From the **Learner Pre-encounter Search Results Page**, questions can be searched, created, edited, status changed, deleted, copied, printed and emailed.

Learner Post-Encounter

► Post-encounter questions are checklist items presented to the learner after the encounter. **Checklists** are applied to a case or scenario by attaching them in to the **Learner Assessment** section of that case or scenario's Activity Page. Then, the learner will have the checklist link on their **Dashboard's To-Do List** when they log in.

► When a Learner **Post-encounter checklist** is created (**Cases & Scenarion > Checklists**) and saved, it is then stored in the system's database.

► Clicking on this link will populate the **Search Results Page** with **Learner Post-encounter** questions already in the Checklist database.

► From the **Learner Post-encounter Search Results Page**, Post-encounter questions can be searched, created, edited, status changed, deleted, copied, printed and emailed.

Learner Self-Assessment

► **Learner Self-Assessment** questions are checklist items for the learner to assess their own performance.

► When a Learner Self-Assessment checklist is created (**Cases & Scenarion > Checklists**) and saved, it is then stored in the system's database for future use in any case or scenario.

► Clicking on this link will populate the **Search Results Page** with **Learner Self-Assessment** questions already in the Checklist database.

► From the **Learner Self-Assessment Search Results Page**, Self-Assessment questions can be searched, created, edited, status changed, deleted, copied, printed and emailed.

► The **Learner Self-Assessment** evaluation report may be generated from **Scores & Reports**.

Survey

► A **Survey** is applied to a case or scenario by adding it in to the Learner Assessment section of that case or scenario's Activity Page. The survey attached to a case or scenario's activity page will be presented to the learner after they complete their Post-encounter checklist following an encounter, or if added when scheduling a session, the survey will follow the last encounter of the session.

► To access the survey, the link will be on the learner's **Dashboard To-Do List** when they log in.

► When a survey is created (**Cases & Scenarion > Checklists**) and saved, it is then stored in the system's database for future use in any case or scenario.

► Clicking on this link will populate the **Search Results Page** with surveys already in the Checklist database.

► From the **Survey Search Results Page**, survey questions can be searched, created, edited, status changed, deleted, copied, printed and emailed.

► An on-demand, standalone Survey is another kind of survey. This is a survey that is independent of any case or scenario and is created in **Session Calendar > Survey**. It can be created and made available for students, SPs and faculty to complete over a pre-defined period and can be submitted anonymously.

Performance Assessment

► This is assigned to SP or Faculty to assess a learner's performance during an encounter. The SP or Faculty needs to be designated with Evaluator rights in **Settings > User Management > User List > Permissions** in order to be assigned as an evaluator. The evaluator is assigned to the case or scenario when scheduling the event in **Session Calendar > Session>Session Evaluators.**

► When a **Performance Assessment** is created **(Cases & Scenarion > Checklists)** and saved, it is then stored in the system's database for future use in any case or scenario.

► Clicking on this link will populate the **Search Results Page** of Performance Assessments already in the Checklist database.

► Questions can be searched, created, edited, status changed, deleted, copied, printed and emailed. The revised questions do not affect preexisting instances of the same checklist.

► Results of a **Learner Performance Assessment** can be applied toward **Competency** skills and evaluation reports may be generated from **Scores & Reports.**

SP Performance Assessment (used in SP Cases, not Scenarios)

► The SP Performance Assessment is used to evaluate the SP's performance. This is done by a faculty evaluator or another Sp. The evaluators are assigned when scheduling the session in **Session Calendar > Simulation Sessions > Session Evaluators.**

► When a SP Performance Assessment is created **(Cases & Scenarion > Checklists**) and saved, it is then stored in the system's database for future use in any case or scenario.

► Clicking on this link will populate the **Search Results Page** with Performance Assessments already in the Checklist database. From the **SP Performance Assessment Search Results Page**, questions can be searched, created, edited, status changed, deleted, copied, printed and emailed.

► When the evaluator of the SP's performance logs onto the application, the evaluation link will be on their **Dashboard's To-Do List.**

EHR (Electronic Health Record)

► Designed to enable students to gain practice in using an EHR as part of their clinical training.

► Create virtual patients, and develop their medical histories via a library of electronic forms.

► Associate one or more virtual patients with cases and/or simulation scenarios.

► Enable students to view and/or edit a patient's EHR during the Pre-Sim study, Pre-Encounter and/or Post-Encounter.

Case Collections

► A series of encounters is called a **Session**. Since multiple cases can be used in a session, they can be grouped together into a **Case Collection**. This is a way to help you organize the cases you will use, and filter out the cases you will not need for scheduling a session.

► Clicking on this link will give you the **Case Collection Search Results Page** which is a list of Case Collections already in the database. Here, collections can be edited, status changed, deleted or copied.

► Use the **Search** field at the top of the **Case Collection Search Results Page** to narrow down your search by Case Collection name or status.

Case Authoring

► Case Authoring is a tool used to allow users to collaborate and create cases. The information will be collected from one or more authors. Authors will be assigned to one or more "Area for reviews" sections of a case. Training case material (using the Case Trainer) will then be developed using approved case authoring documents.

Case Trainer

► Utilize Case Trainer to either create or designate a case to be used as a Training Case. A Training Case is used to train SPs and learners for their role-playing performance. Training case development is an interactive process between the case author, SP Trainer, SP, faculty and learner.

► When a case is designated to be used as an SP Training Case, an SP must be assigned to that case. When the SP logs in, the Training Case is on their dashboard for them to complete. The training consists of computerized exercises with a practice checklist and may contain videos to prepare SPs to portray a role on a case-by-case basis.

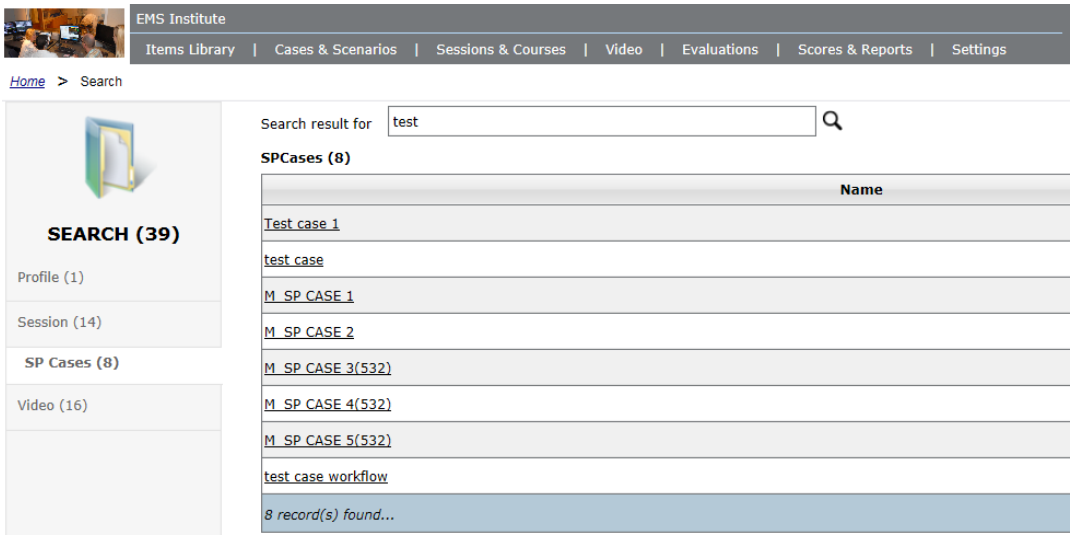
► The Case Trainer functionality within the Cases and Scenarios module also provides a list of Areas for Review for the Case participant. These may include medical history, social history, and particular patient risk factors.

Search Across Modules

The search across modules feature indicates where the selected keywords have been found within each module.

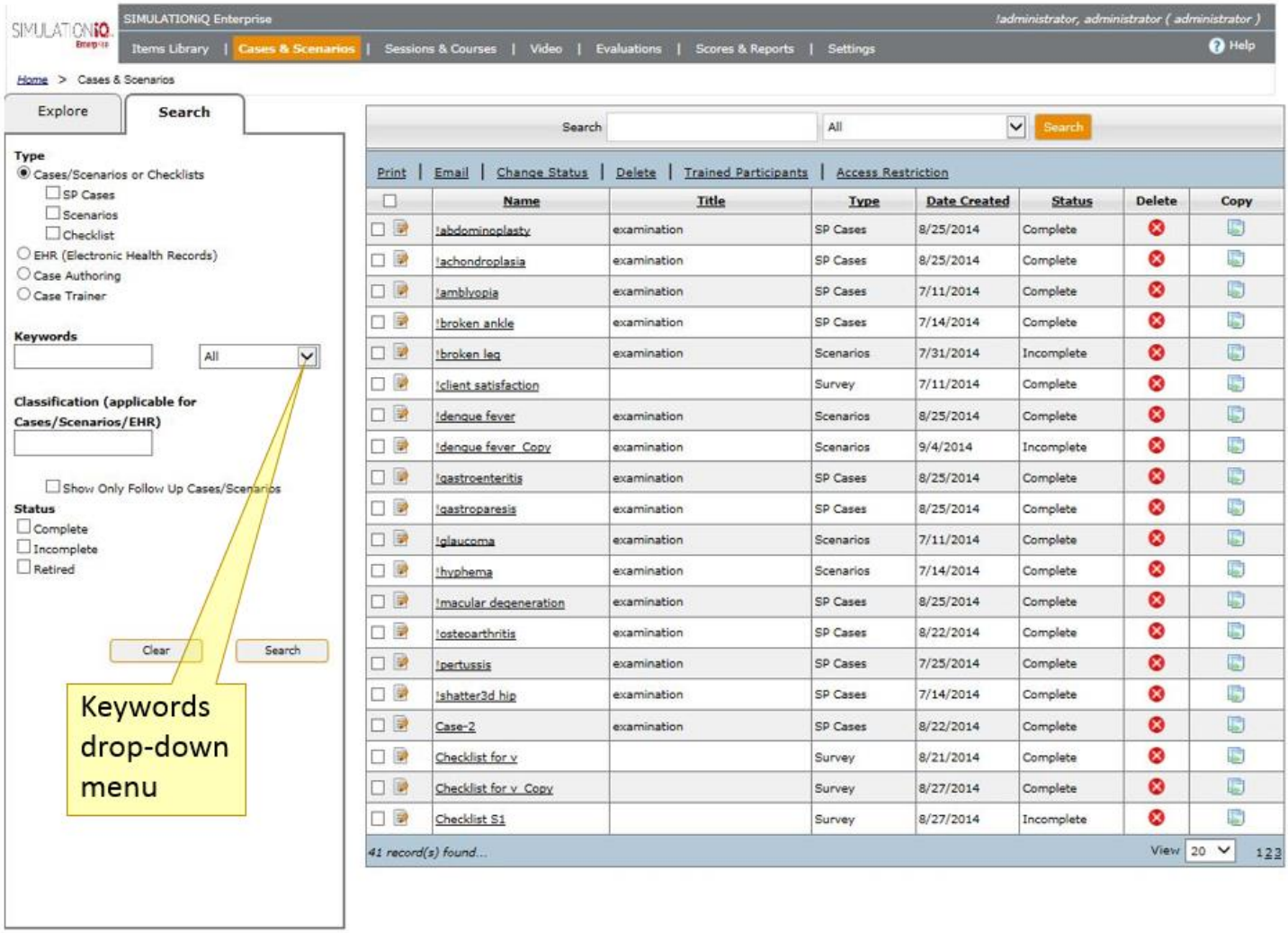
1. Click the magnifying glass.

2. Type a keyword and then click the magnifying glass again.



3. The search results appear to indicate where the selected keywords have been found within each module.

Search Tab



Search Tab

► Use the **Search Tab** to quickly search for created Cases, Scenarios, Checklists, or Electronic Health Records. The Search results will populate in the **Search Results Landing** page in the right pane.

► Use the checkboxes, radio buttons, or type in keywords in the Search Tab fields to redefine the content in your search results.

Search Tab Items:

- Cases and Scenario or Checklist
    - SP Cases
    - Scenarios
    - Checklist
- Case Authoring
- Case Trainer
- EHR
- Keywords
- Classification
- Follow-up Cases
- Status

Cases and Scenario or Checklist

1. Click on the Cases and Scenario or Checklist radio button.

2. Select the checkbox next to the item(s) to specify search criteria:

    a. **SP Cases** - Cases using Standardized Patients (individuals trained as patients) in an encounter portrayal.
    b. **Scenarios** - Cases using a simulator as a patient in the encounter portrayal.
    c. **Checklist**- List of questions used to evaluate the learner or SP.

3. To narrow your search results:

    Type **Keywords** in the text field *(such as the name of a case, a patient, etc.)* and select the filter drop-down menu *(All, Name, Description, Case Title, Case Objective, Case Keyword)* or choose **Status** *(Complete, Incomplete or Retired)*.

4. Click **Search**.

EHR

► A virtual EHR (Electronic Health Record) patient can be associated with a case or scenario, but can also be scheduled independently. The virtual EHR follows the virtual patient through subsequent follow-up cases.

To search for EHR patients:

1. Click the **EHR** radio button.

2. Type keywords in the text field and select the filter drop-down menu *(All, Name, Gender, Age)*, or select **Classification, Follow-up Cases**, **or by Status** (*Retired or Active*).

3. Click **Search**.

Keywords

► Use to filter search criteria. Keyword field changes to reflect Type (Cases and Scenarios or Checklist, Case Assistant or EHR) selected.

1. Type **keywords** in the text field (such as the name of a case, a patient, etc.,) or select the filter drop-down menu (All, Name, Description, etc.).
2. Click **Search**.

Classification

► A Classification acts as an additional filter when conducting searches for cases or scenarios. A Classification can be any category defined by the user to group cases or scenarios. Examples might be: programs of study, medical categories, acuity, age, gender, etc.

1. Type in a **Classification** in the text field.
2. Type any keyword into the **Keywords** text field to further filter your search (*optional*).
3. Click **Search**.
4. If a Classification was designated in a case's or scenario's **Activity Page**, then it will be listed on the Classification Search Results Page.

Show Only Follow-Up Cases

► Use to search for any cases or scenarios that have been used as a **Follow-up visit.**

► Follow-up cases can be defined on the Cases & Scenarios Activity Page > Follow-Up Visit section.

1. Click the **Show Only Follow-up Cases** checkbox.
2. Type any keyword into the **Keywords** text field to further filter your search (*optional*).
3. Click **Search**.

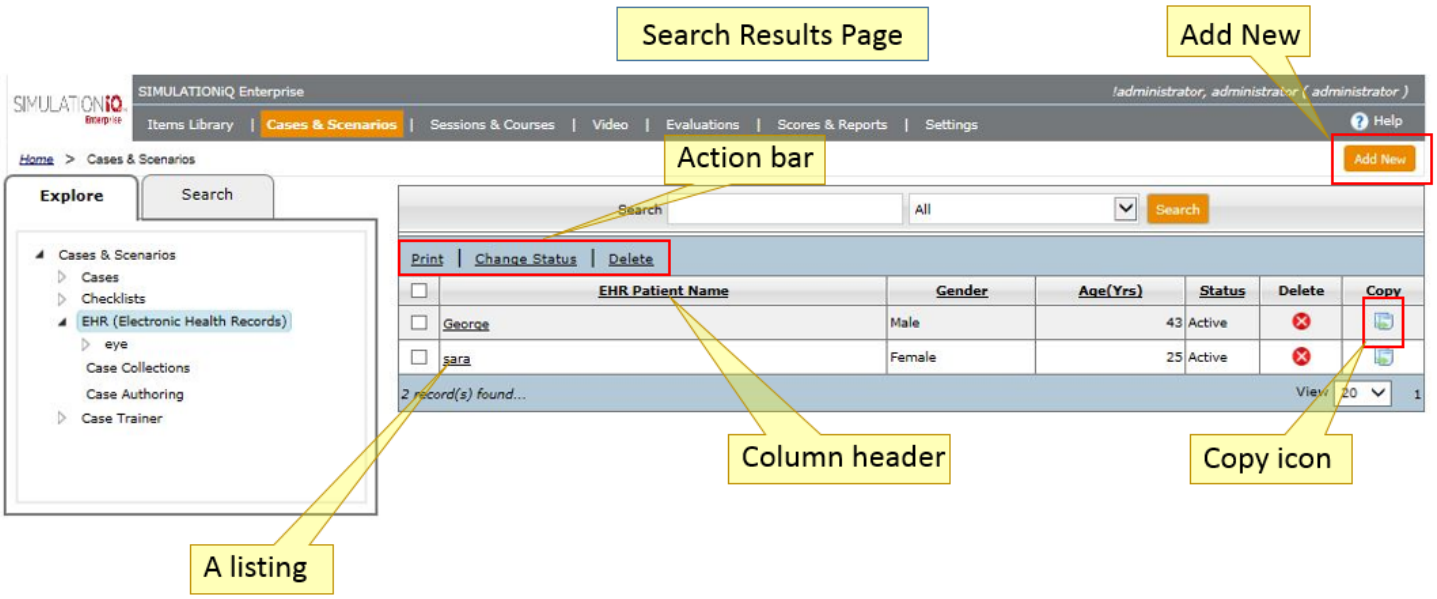
Status

► Select the status of a case or scenario by whether it's an active, retired, completed, or incomplete case or scenario.

► Status field changes to reflect the Type (Cases and Scenarios or Checklist, Case Assistant or EHR) selected.

- **Complete** – A Case needs to be marked complete in order to be available for scheduling and to be added to a Case Collection.
- **Incomplete** – All new cases are incomplete until marked as complete.
- **Retired** (in active, not in use) - An alternative to deleting, which would remove it permanently.
- **Active** – Available for use and scheduling.

Search Results Page Overview



► Clicking on any Task on the **Landing Page**, the **Explore Tree**, or doing a Search using the **Search Tab** will bring you to that task's **Search Results Page**.

►The **Add New** button is located at the top right of every **Search Results Page**. This makes it convenient to create a new item pertaining to your search.

► The **Search Results Page** is a listing of data already in the database pertaining to the task selected. For example, when a checklist is created, the system keeps a record of it in its database; when you select the **Checklist task** (or any of the tasks), the **Search Results Page** in the right pane populates with a list of all the checklists already created in the database.

► Selecting an item on the **Explore** or **Search Tabs** to the left will further narrow your search results.

Access the Search Results Window in any of these 3 ways:

1. Click any item in the **Explore Tab.**

2. Click the **Search Tab** and select your search criteria.
3. Click any Task on the **Task Landing Page**.

Select Items in the Search Results list:

1. Click the checkbox next to the listing.
2. To select the entire list, click the checkbox to the right of the **Name** column header.
3. Clicking on the listing's name will open a window where the details can be edited.

To print, email, change status, copy, or delete item in list:

1. Select the checkbox next to the right of the listing name.
2. Select the desired function in the menu bar across the top of the window.

Sort List:

Click on the **column header** in the **Action Bar** you want to sort. The list will toggle between ascending or descending order each time the header is clicked.

Delete Listing:

Delete – Click the **X** in the **Delete column** to delete a listing.

Copy a Listing:

Click the **Copy** icon under the **Copy column** to make a copy of an item *(Copying is beneficial if you want to make changes to an item without changing the original).*

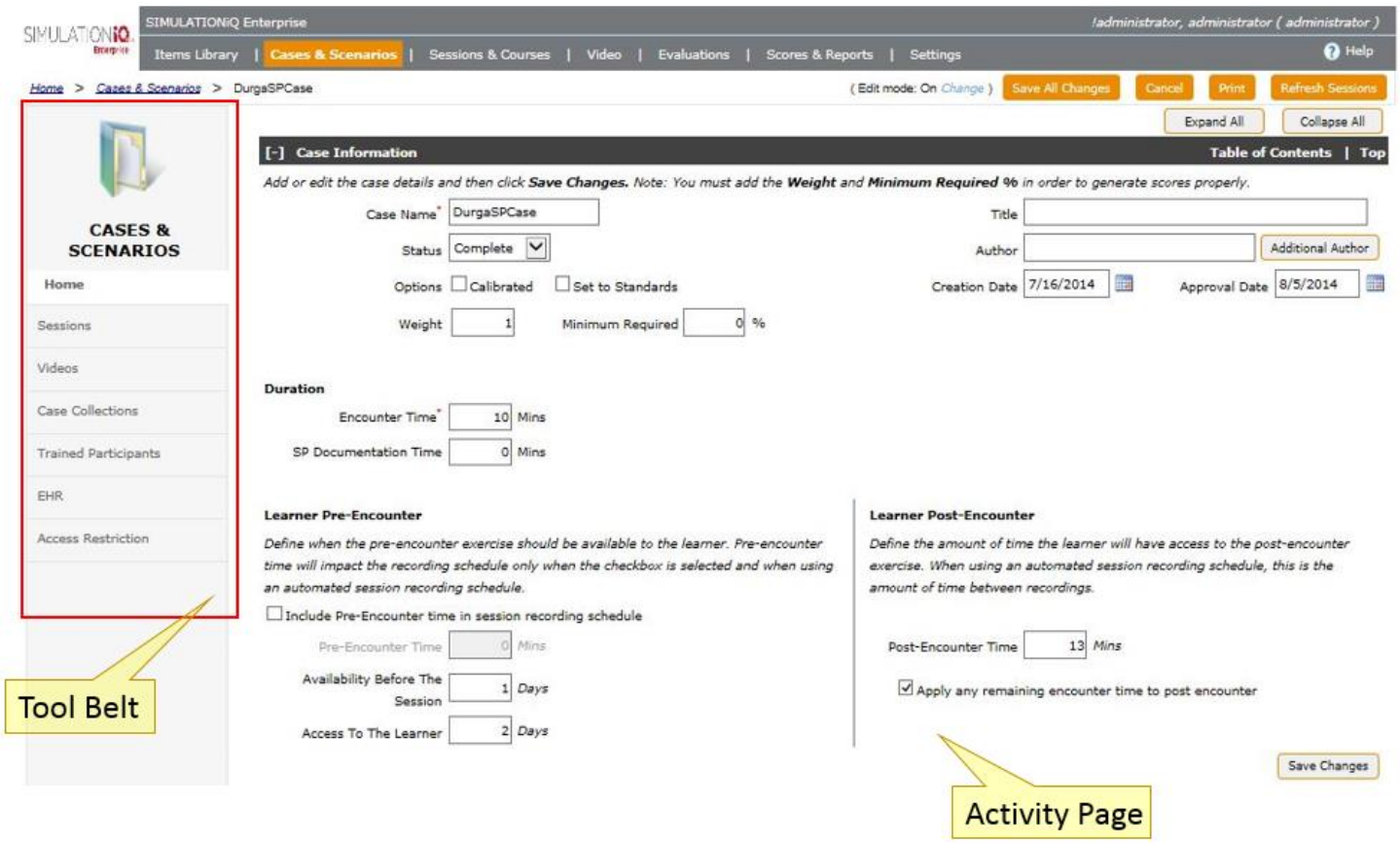
Edit the details of a listing:

Click on the name hyperlink which will open its Activity Page.

Create a New item from the Search Results Page:

1. In the **Explore or Search Tabs** in the right pane, click on the type of item you want to create.
2. Click the **Add New** button on the top right of the Search Results window.
3. Add the details of the item in the pop-up window.
4. Click **Create**.

Cases and Scenarios Tool Belt



The **Tool Belt** is the navigational bar on the left column available in all modules within an **Activity Page** as a cross-reference to related modules.

Home

► Clicking **Home** navigates you back to the selected scenario's **Activity Page.**

Sessions

► Clicking **Sessions** in the **Tool Belt** will list sessions using the same case or scenario. Other sessions can be searched by clicking on the **Search** button on the top of the listing window or by typing the **keywords** in the **Search** text field and selecting the appropriate drop-down menu (Session Name, Session Date, Duration, Room, Case/Scenario or Status).

Videos

► Lists videos that have been recorded and associated (indexed) with this scenario.

► This provides the ability to search for a specific video that was associated (indexed) with this scenario by date, room, case, assigned SP, and assigned learner. Click on the video listing hyperlink to load video in the Video Column where it can be viewed. Click the **Show Details** button under the video in the Video Column to open that video's **Playback Activity Page** where the video can be viewed, bookmarked and details of the video information can be edited.

Case Collections

► A series of SP encounters is called a **Session**. Since multiple cases can be used in a session, they can be grouped together by a common criterion (i.e., 3rd-Year OSCE Exam.) into a **Case Collection**. This is a way to help organize the cases you will use and filter out the cases you will not need when scheduling the session.

► There can be any number of cases in a collection, and the case can be a member of multiple collections.

► Click on the **Case Collections** link in the **Tool Belt** to see if this case is part of a Case Collection. If you would like to add it to a Case Collection, go to the **Case Collection task module** on the **Cases & Scenarios Task Landing Page**.

Trained Participants

► Click on **Trained Participants** link in the **Tool Belt** to find users who are trained and approved for the case. This enables trained users to be selected when scheduling a session from this case. Users marked as trained will have the ability to watch video and submit QA checklist automatically.

EHR

► Click the EHR link in the Tool Belt to see a list of any virtual EHR patients assigned to this case or scenario. Or, assign a patient by clicking the **Assign EHR Patient** button. An **Assign Patient** window will pop up listing virtual EHR patients already created in the **EHR task module** on the **Cases & Scenarios Task Landing Page**. Select the checkbox of the virtual EHR patient you would like to assign to the case or scenario and then click the Assign button. The virtual EHR follows the virtual patient through subsequent follow-up cases.

Access Restriction

► Click to grant view or edit access to the case or scenario by organization unit/learner group.

SP Cases

SP Case Preparation Checklist

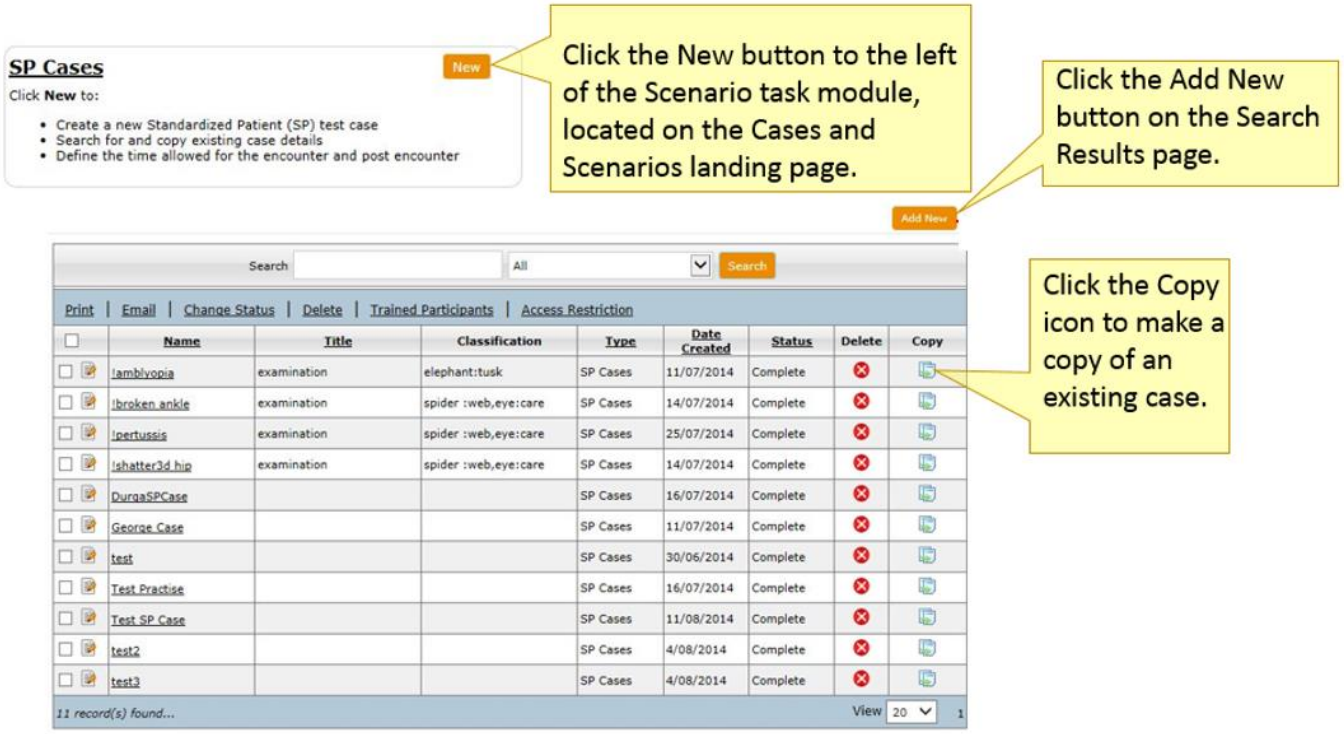
Verify this information before creating a new SP Case:

☐	**Name of Case**	Enter appropriate name for case.
☐	**Title of Case**	If using a title. This may be visible or invisible to learner depending on the Parameter setting (50 characters).
☐	**Encounter Time**	Enter the duration of the encounter time which is the time the cameras need to be rolling in order to record the case interaction.
☐	**Case Objective and Case Definition**	What are the objectives, complaint, physical findings?
☐	**Follow-Up visit**	If this is a follow-up visit to another case or scenario, indicate in the Follow-up Visit, or designate this as an original case to a follow-up visit.
☐	**Train SP for case**	If needed, use Cases & Scenarios > Case Trainer to setup an SP to be trained.

☐	**Assign Trained SP**	Assign the SPs available and trained to portray case.
☐	**Categories for Checklist Items**	A Category is used to group questions according to the skill that is being assessed. For example: Patient History, Communication, etc. The Category also can define the response type (such as Yes/No, text, or a Likert scale) and the scoring criteria.
☐	**Pre-encounter / Post-encounter** **Questions, Support files**	Educational material and/or tests for learner to complete prior to and after the encounter.
☐	**Assessments**	Questions for assessment are entered and stored in Items Library. Enter questions for the appropriate assessment type: (Pre-encounter, Evaluator, Team, Post-encounter, Survey and Self-Evaluation). Questions can be added to the Items Library for future use.
☐	**Support Files**	Gather support files to aid in case creation, scoring help, and learner's checklists.
☐	**Classification**	Cases can be Classified which can be used as a search filter and for Utilization Reports.
☐	**Accreditation**	If case is applicable to an accreditation, then indicate it when it is scheduled. When you associate an accreditation with a case session, each student enrolled in that session is credited with the amount of time equal to the length of the session. The Utilization report enables you to view the amount of time accredited per student per named accreditation per case/session.
☐	**Bookmarks**	Decide what points in the video to emphasize to meet your objectives by setting bookmarks. Bookmarks are added in the Video task module.
☐	**Time adjustments**	According to the amount of checklist items and the case development adjust the duration, pre and post encounter time, if needed.
☐	**Users**	Check that necessary Learners, SPs, Educators are entered into database (Settings > User List).
☐	**Schedule case**	If scheduling at this time, use the Session Calendar > Simulation Sessions to schedule room, case recording, and participant Learners and Evaluators.

Creating a New SP Case

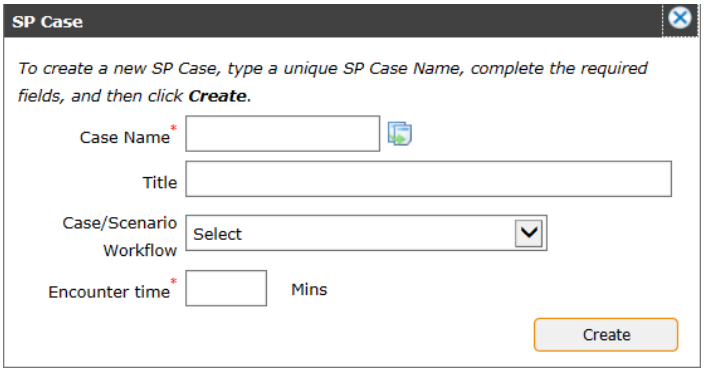
There are three ways to create an SP case, as shown in the following diagram:



New SP Case Popup Window

► Pressing the **New** button from the Cases and Scenarios Landing page or **Add New** button from the Cases landing page will open the SP Case pop-up window.

In the SP Case pop-up window:



1. Enter new **Case Name** (mandatory field).
2. Enter **Title** (optional) – title of case, could be same as case name. Title can be visible or invisible to learner by configuring **Settings>Parameters> Scheduling**. A maximum of 50 characters are allowed.

3. Enter **Encounter Time** (mandatory field). This is the amount of time the learner interacts with the SP during the encounter.

4. Select an existing **Case/Scenario workflow** or add a new workflow with the case/scenario details after you click Create.

5. Click **Create**.

Copy Case

► Copying a case is a quick way to create a new case utilizing the same information and checklist items as the original. All information can then be customized.

To copy an existing case:

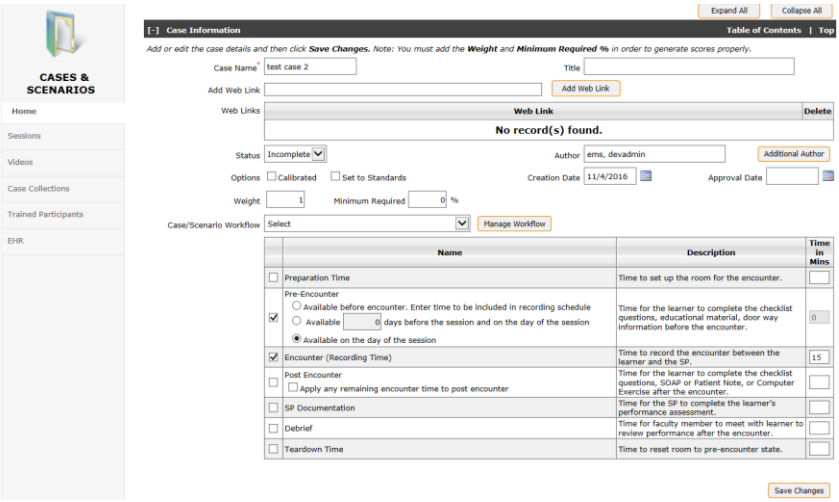
1. Click the **Copy** icon to create a new case based on an existing case.

2. Click the **Create** Button.

3. A pop-up window will appear allowing you to edit the name, title, and encounter time.

4. Click the **Copy** button which will bring you to the Case Activity page where the case can be specified in greater detail.

Case Activity Page



- Use the **Case Activity Page** to specify case details.
- The Activity Page is broken down into sections. Navigate to each section to develop your case.
- Each section has a [-] symbol to the left of the section title to collapse that section.
- Each section has a **Table of Contents** on the blue section bar for easy navigation through the page.
- Clicking on the **Top** anchor on the section bar will quickly bring you to the top of the page.

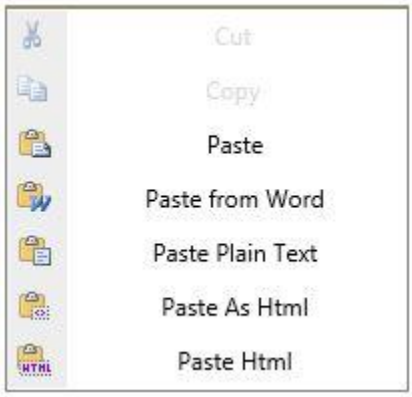
- To edit the input fields, turn the **Edit mode to "On"** by clicking on the Edit Change hyperlink on the top, right of page.
- Each section has a **Save Changes** button to save edits in that particular section. Click **Save All Changes** at the top of the page to save all changes to all sections at once.
- The **Tool Belt** has links to modules that are related to the current Case Activity Page.

Copy and paste selections are available at the following dialog boxes:

Case Objectives

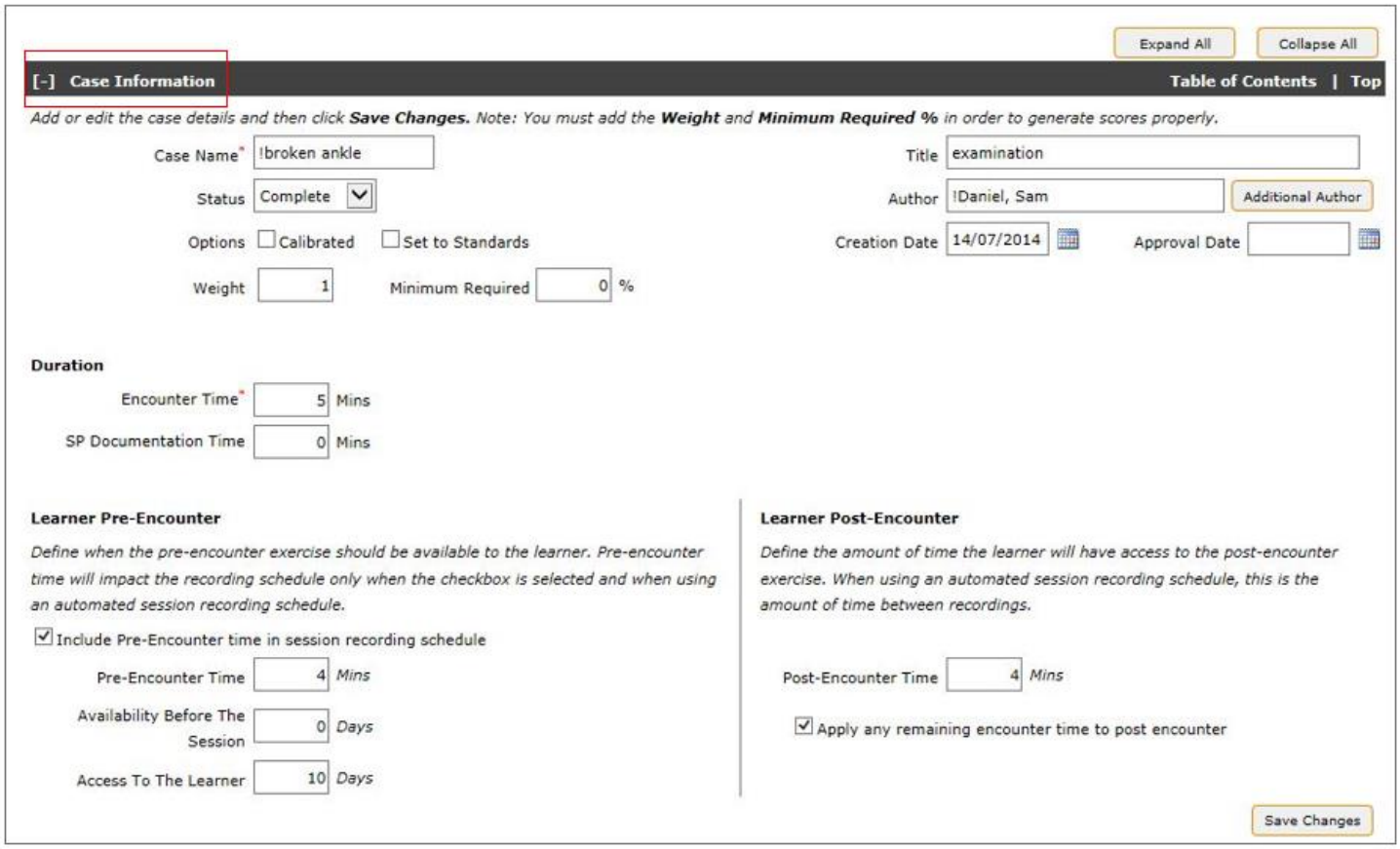
- Primary
- Secondary

Right-click on your mouse at this page to call up the following selections (as shown):



- **Cut** – Select existing text and cut from activity page.
- **Copy** – Select existing text and copy from activity page.
- **Paste** – Paste new text onto the activity page.
- **Paste from Word** - Paste new text onto the activity page from MS Word to retain Word formatting.
- **Paste Plain Text** – Paste unformatted text as plain text (from MS Notepad or a similar application).
- **Paste as HTML** – Paste text regardless of existing formatting onto page in HTML format.
- **Paste HTML** – Paste existing HTML text onto activity page.

Case Information



The **Case Information** section is where the name, title, description, status, and time is specified for the encounter and the Pre- and Post-Encounter activities.

Note: The Case Author name defaults to that of the logged-in user.

Application Workflow

Case Name *(mandatory field)*

1. Click on **Case Name** text field and type name of the case.
2. Click **Save Changes** button.

If running multiple sessions, keep same name, this way, the name will be in the drop-down menu and can easily be compared with others when generating reports.

Title *(optional)*

1. Click on **Title** text field and input title of case.
2. Click the **Save Changes** button.

Title can be visible or invisible to the learner by **Settings > System Configuration > Parameters > Scheduling**, go to **Show Case Name in Dashboard's To-Do List**. You choose which you wish to be visible – either Case Name or Case Title.

Status

Status of case creation:

1. Click on the drop-down arrow next to Status and make your selection:
   a. **Complete** – case needs to be marked complete in order for it to be available for scheduling and to be added to a Case Collection.
   b. **Incomplete** – All new cases are incomplete until marked as complete.
   c. **Retired** (*inactive, not in use*).
2. Click the **Save Changes** button.

Options

Calibrated – This is no longer required. Previously, this was checked when the case was marked Complete, in order to have responses collected and scores applied. This regulation has been lifted.

Set To Standards – only check this box if the case will be used as a standard for a particular case or exam. Usually used for approved state licensing cases.

Caution: A Set To Standards Case cannot be changed; it's locked as a Standard checklist forever.

Weight

Enter the weight of this case. A case needs to be weighted for the case to be counted in the scoring process. The default value is 1. Cases within a Case Collection can be weighted differently. The system will adjust score according to weight given. A weight of zero means the data can be collected but it

won't count in the scoring process. Enter up to 2 places to the right of the decimal for Weight (i.e., 1.00).

Note: Use this is if the parameter "**Case Collection Workflow Enabled** " is set to Yes (Settings > Parameters > Cases & Scenarios). If set to Yes, proceed with instructions (see the Settings documentation for more information on parameters).

Minimum Required

The minimum percentage to pass the case based on the checklist scores of the learner. If the case is part of a Case Collection, then the minimum percentage is taken into account in relation to the entire collection score.

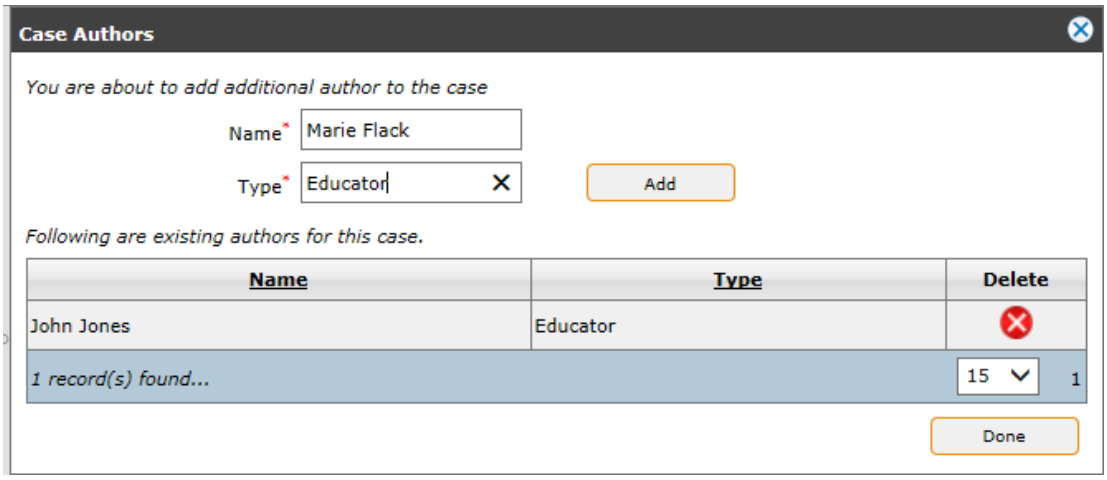
Author

1. The author is the name of the person who is currently logged in. This can be changed by highlighting the text inside the **Author** text field and typing in a new author's name.
2. Click the **Save Changes** button.

Additional Authors

To add additional Authors to the case:

1. Click the **Additional Authors** button.
2. A **Case Authors** window will pop up (as shown).



3. Enter **Name** and **Type** in the text fields, then click **Add**.
4. Continue until all authors are added, then click **Done**.
5. To **delete** an author entry, click on the **X** in the Delete column of the author you want to delete.

Creation Date

Select a Creation Date for the case:

1. The creation date defaults to the date you are logged in to create the case.
2. To change the default date:
   a. Click on the **calendar** next to the text field.
   b. Select the date on the calendar.
   c. Date will now be in the date text field.

Approval Date

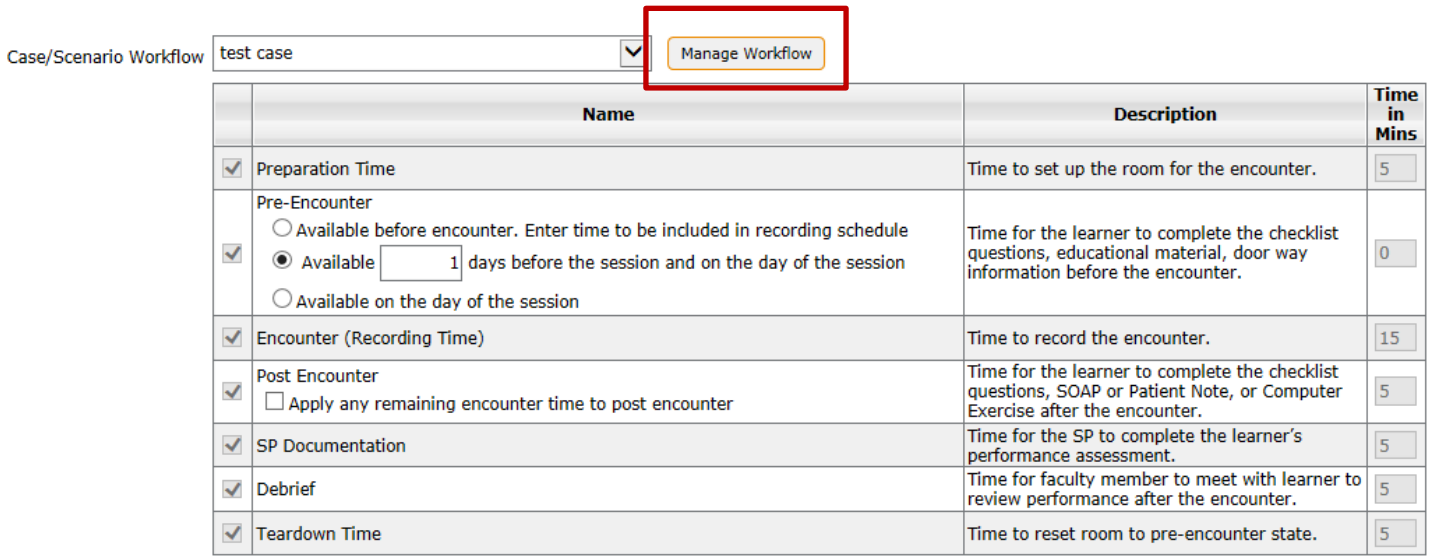
Select an Approval Date for the case:

This is optional. If your Organization Unit has someone who reviews and approves the case creation process, this is a feature where the approver can date stamp the case.

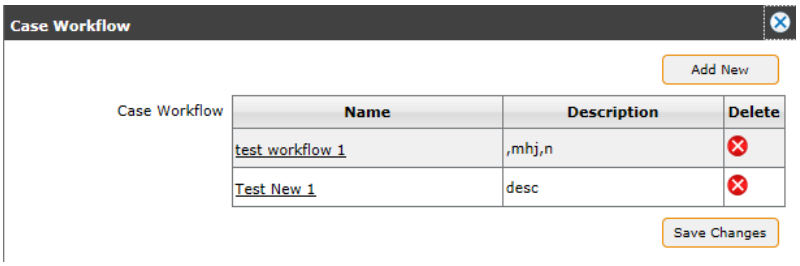
1. Click on the **calendar** next to the text field.
2. Select the date on the calendar.
3. Date will now be in the date text field.

Case Workflow

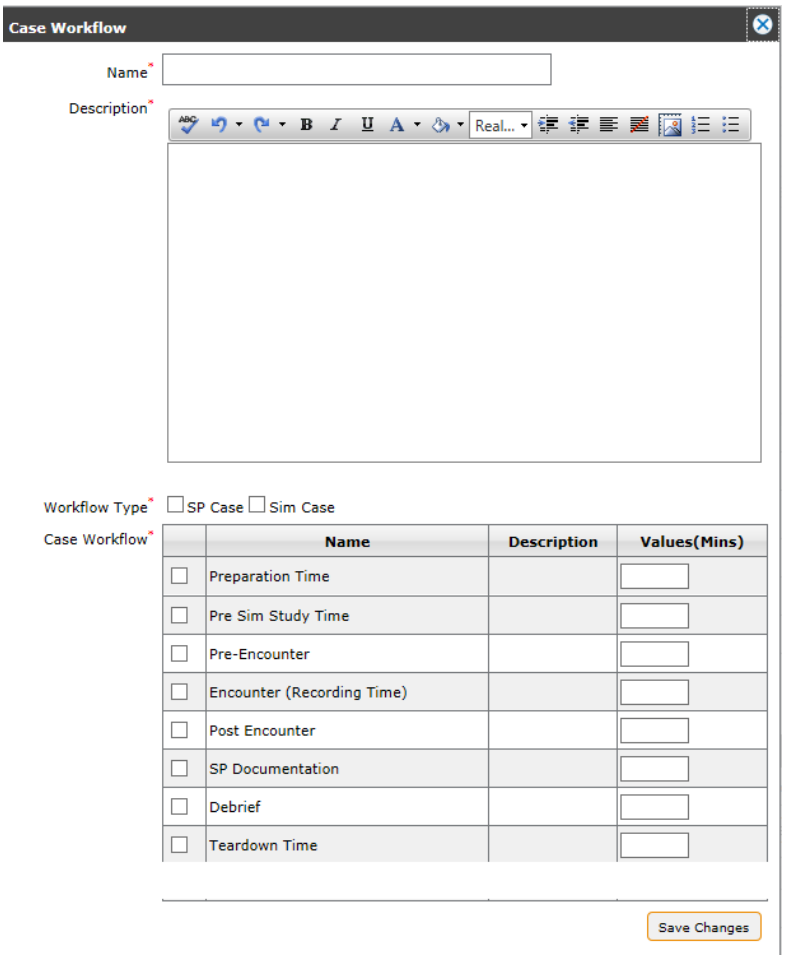
The Case/Scenario Workflow tool enables you to better manage the details of a case and the timeline necessary for the learner to complete the encounter with a standardized patient (SP).



1. From the **Case Workflow** area:
   - Select an existing customized workflow
   - Complete the workflow grid, or
   - Click **Manage Workflow** to create a new customized workflow



2. Click **Add New**.



3. Complete the following fields:

Preparation Time	Number of minutes needed to set up the room for the encounter.
Pre-encounter	Number of minutes for the learner to complete the checklist questions or educational material before the encounter. See definitions on the following pages.
Encounter (Recording Time)	Number of minutes needed to record the encounter between the learner and the SP.
Post Encounter	Number of minutes for the learner to complete the checklist questions, SOAP or Patient Note, or Computer Exercise after the encounter.
SP Documentation	Number of minutes for the SP to complete the learner's performance assessment.
Debrief	Number of minutes needed for faculty member to meet with learner to review performance during the encounter.
Teardown Time	Number of minutes needed to reset room to pre-encounter state.

Case/Scenario Workflow: test case [Manage Workflow]

	Name	Description	Time in Mins
☑	Preparation Time	Time to set up the room for the encounter.	5
☑	Pre-Encounter ○ Available before encounter. Enter time to be included in recording schedule ◉ Available 1 days before the session and on the day of the session ○ Available on the day of the session	Time for the learner to complete the checklist questions, educational material, door way information before the encounter.	0
☑	Encounter (Recording Time)	Time to record the encounter.	15
☑	Post Encounter ☐ Apply any remaining encounter time to post encounter	Time for the learner to complete the checklist questions, SOAP or Patient Note, or Computer Exercise after the encounter.	5
☑	SP Documentation	Time for the SP to complete the learner's performance assessment.	5
☑	Debrief	Time for faculty member to meet with learner to review performance after the encounter.	5
☑	Teardown Time	Time to reset room to pre-encounter state.	5

4. From the **Case/Scenario Workflow** field, select the workflow and then select the pre and post encounter options as needed.

Scenario Workflow

Field	Description
Scenario Workflow	

Preparation Time	Number of minutes needed to set up the room for the encounter.
Pre-Sim Study Time	Number of minutes for the learner to review the study materials.
Pre-encounter	Number of minutes for the learner to complete the checklist questions or educational material before the encounter.
Encounter (Recording Time)	Number of minutes needed to record the encounter between the learner and the simulator (manikin).
Post Encounter	Number of minutes for the learner to complete the checklist questions, SOAP or Patient Note, or Computer Exercise after the encounter.
Debrief	Number of minutes needed for faculty member to meet with learner to review performance during the encounter.
Teardown Time	Number of minutes needed to reset room to pre-encounter state.

Case/Scenario Workflow: Select [Manage Workflow]

	Name	Description	Time in Mins
☐	Preparation Time	Time to set up the room for the encounter.	
☐	Pre Sim Study Time	Time for the learner to review the study materials.	
☐	Pre-Encounter	Time for the learner to complete the checklist questions, educational material, door way information before the encounter.	
☑	Encounter (Recording Time)	Time to record the encounter.	15
☐	Post Encounter ☐ Apply any remaining encounter time to post encounter	Time for the learner to complete the checklist questions, SOAP or Patient Note, or Computer Exercise after the encounter.	
☐	Debrief	Time for faculty member to meet with learner to review performance after the encounter.	
☐	Teardown Time	Time to reset room to pre-encounter state.	

1. From the **Case/Scenario Workflow** field, select the workflow and then select the pre and post encounter options as needed.

2. Click **Save Changes**

Learner Pre-Encounter

► Defines the amount of time pre-encounter questionnaire and support documents should be available to learner to complete prior to the case encounter; the number of days in advance of the session that the pre-encounter should become available; and how many days the learner should have access to the pre-encounter. Pre-encounter documents are attached to the case in the **Learner Assessment** section of the **Activity Page**.

► Pre-encounter time availability can be overridden at the Session Scheduling level.

Include Pre-Encounter time in session recording schedule:

Define when the pre-encounter exercise should be available to the learner. Pre-encounter time will impact the recording schedule only when the checkbox is selected and when using an automated session recording schedule.

1. If checked, **Pre-Encounter time** will be included in the session schedule when using an automated session recording schedule.

   This does not mean it is included in the time of recording, only that the time will be included on the schedule. So if there are multiple encounters in the automatic session, and this is checked, the cameras will stop during the pre-encounter time allotted and will resume when the actual encounter

begins. This is only for an automated recording session.

2. When checked, **Pre-Encounter time** field is available to indicate how many minutes to allot on the schedule for learner pre-encounter checklist completion.

Availability before the session *(days)*

1. Indicate how many days the pre-encounter material will be available to the learner before the session.
2. If making pre-encounter material *available the day of the encounter,* count it as a day.
3. If pre-encounter material is not available to the learner the day of the encounter, do not count that day in the available days.
4. Learner Pre-encounter Questionnaire and Support documents are added to the Learner Assessment section of the Activity Page.

Access to the learner

Indicate the number of days the learner will have access to the Pre-encounter material.

Example:

Availability before the session: 2 Days

Access to Learner: 3 Days

This indicates that the Pre-encounter exercise is available 2 days before the scheduled session AND the day OF the session.

Example:

Availability before the session: 2 Days

Access to Learner: 2 Days

This indicates that the Pre-encounter exercise is available 2 days before the scheduled session AND NOT the day OF the session.

Learner Post-Encounter

►Defines the amount of time the learner has to complete the post-encounter Questionnaire, SOAP or Patient note and Computer Exercise. Post-encounter questions are attached to the scenario in the **Learner Assessment** section of the Activity Page.

►When using an automated session recording schedule, this is the amount of time between recordings.

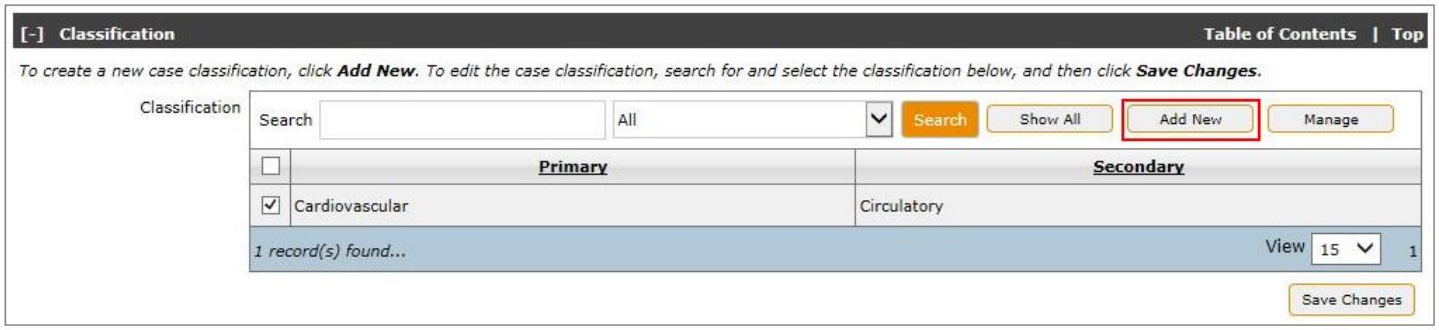
►The Post-encounter can be disabled at the Session Scheduling level.

Post-Encounter Time (*mins*)

1. Indicate the amount of time the SP and learner have to complete Post-encounter questionnaires, surveys, or Assessments.
2. Learner Post-encounter questionnaire is specified in the Learner Assessment section of the page.
3. Click the **Save Changes** button.

Apply Any Remaining Encounter Time to Post-Encounter – By clicking this checkbox, this applies any time the learner saves by completing the session early to the learner's post-encounter time. For example, this could add additional time for the SOAP note if the learner finishes the encounter early.

Classification



A **Classification** is a category or division that is user-defined solely for filtering searches and reports. A case or scenario can be classified by course, organization, learning level, etc.

To find a Classification already in the database:

1. Click **Show All** Classifications to view all classifications, and then click the checkbox next to the desired classification for the case.
2. Click the **Save Changes** button.
3. **Search** – In the Search text field, input a classification if known.

   All – Click **Show All** to view all classifications.

   Primary – Search cases or scenarios that have a primary classification.

   Secondary – Search cases or scenarios by a secondary classification.

   Then click **Search**.

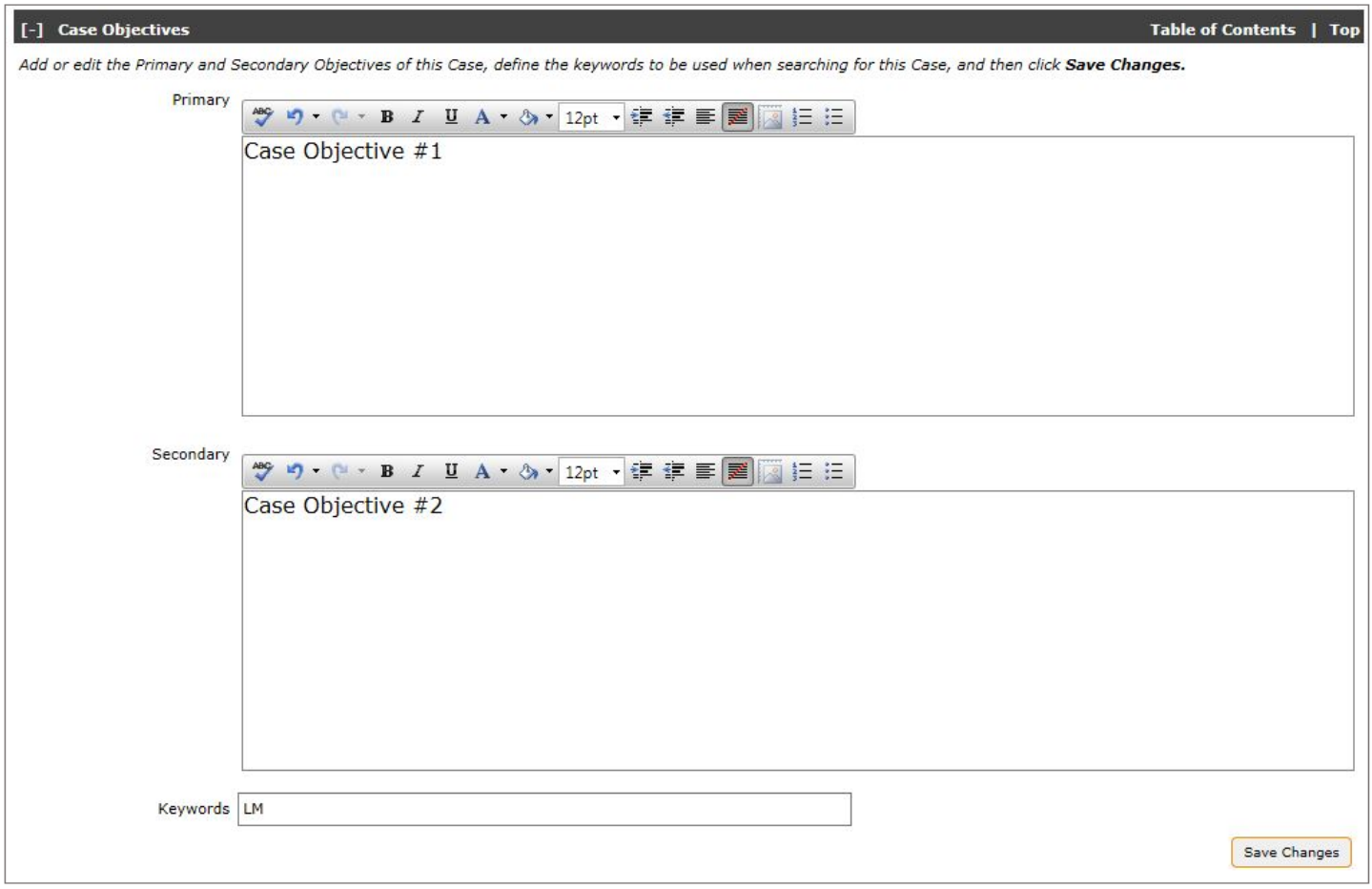
4. Narrow down your search by utilizing the drop-down menu and select either Primary, Secondary or any other classification that has been added to your Organization Unit's database. Then click **Search**.

To add a new classification

1. Click **Add New** button.
2. Enter a **Primary** and **Secondary** field.
3. Click **Save Changes** button.

Classification is a non-mandatory field; however, if a **Primary** classification is specified, then a **Secondary** classification needs to be specified.

Case Objectives



Add or edit the Primary and Secondary objectives of this case, define the keywords to be used when searching for this case, and then click **Save Changes**.

Application Workflow

Add or Edit Case Objectives *(Optional)*

Defines a purpose for the case:

1. Click in the text field and add your objectives:

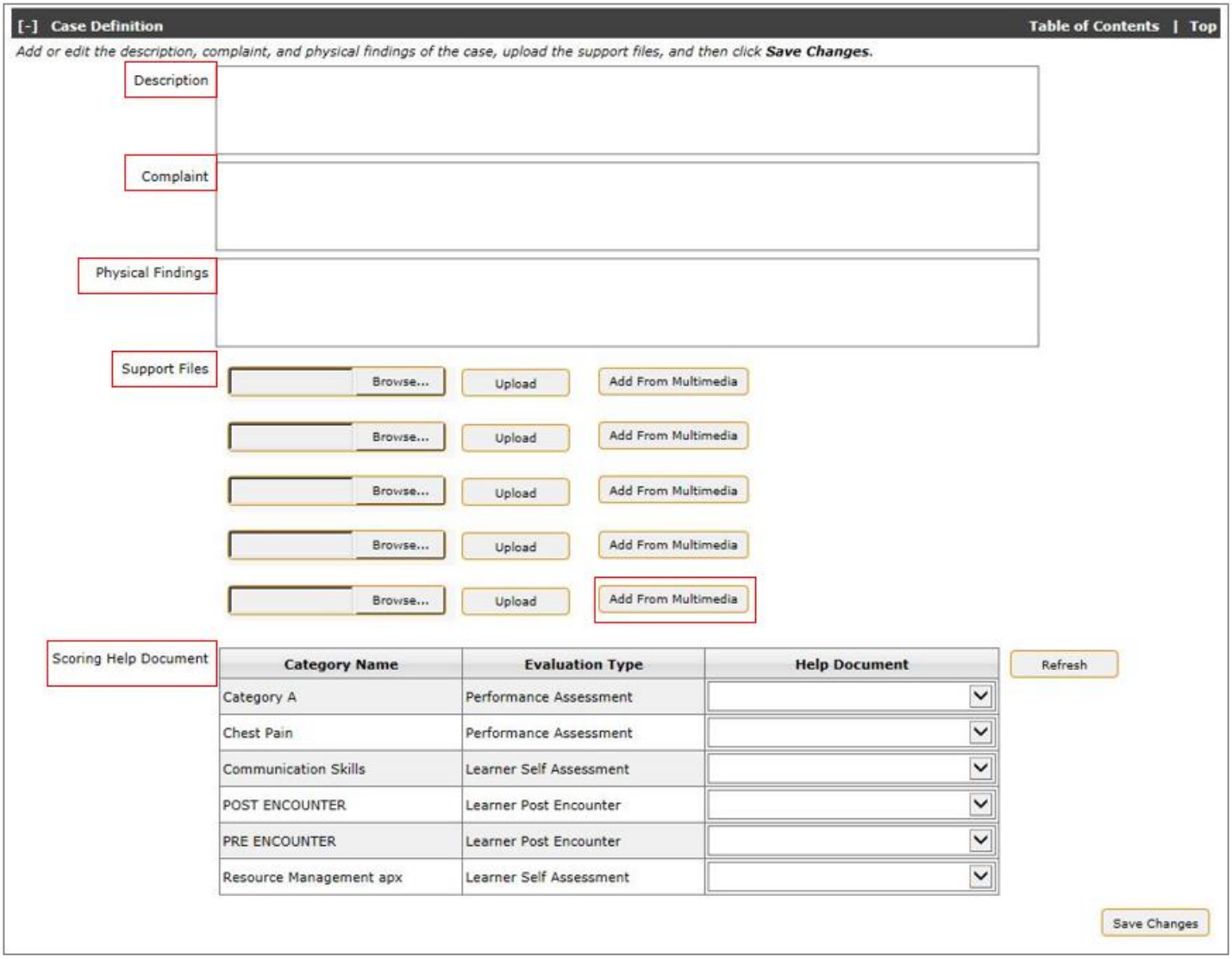
   Primary Objective

   Secondary Objective

Keywords – *(optional)* Indicate keywords here which will act as a filter when searching for this objective.

2. Click the **Save Changes** button.

Case Definition



1. **Description** - Click in the text field and add the description for the case. This is an explanation of the details of the case including, but not limited to, patient's age and condition.

2. **Complaint** – What will be the SP's complaint?

3. **Physical Findings** – Indicate any physical clues the learner will need to notice.

4. **Support Files** – Upload any files including images or videos that will aid in the creation of the case definition. This is only viewed by the Case creator. Support files are not stored anywhere but here.

5. **Scoring Help Document** – Upload any files to clarify how to score the assessment questions.

6. Press **Save Changes** for each section, **Save All Changes** for the activity page, and press the **Refresh** button when finished.

Support Files

To assist in the case creation, documents, images, and multimedia files can be uploaded from your computer or from the **Multimedia Library**. Only one file can be uploaded into each Support File field making a total of 5 files. Each file size has a 2GB maximum file size.

Upload a file:

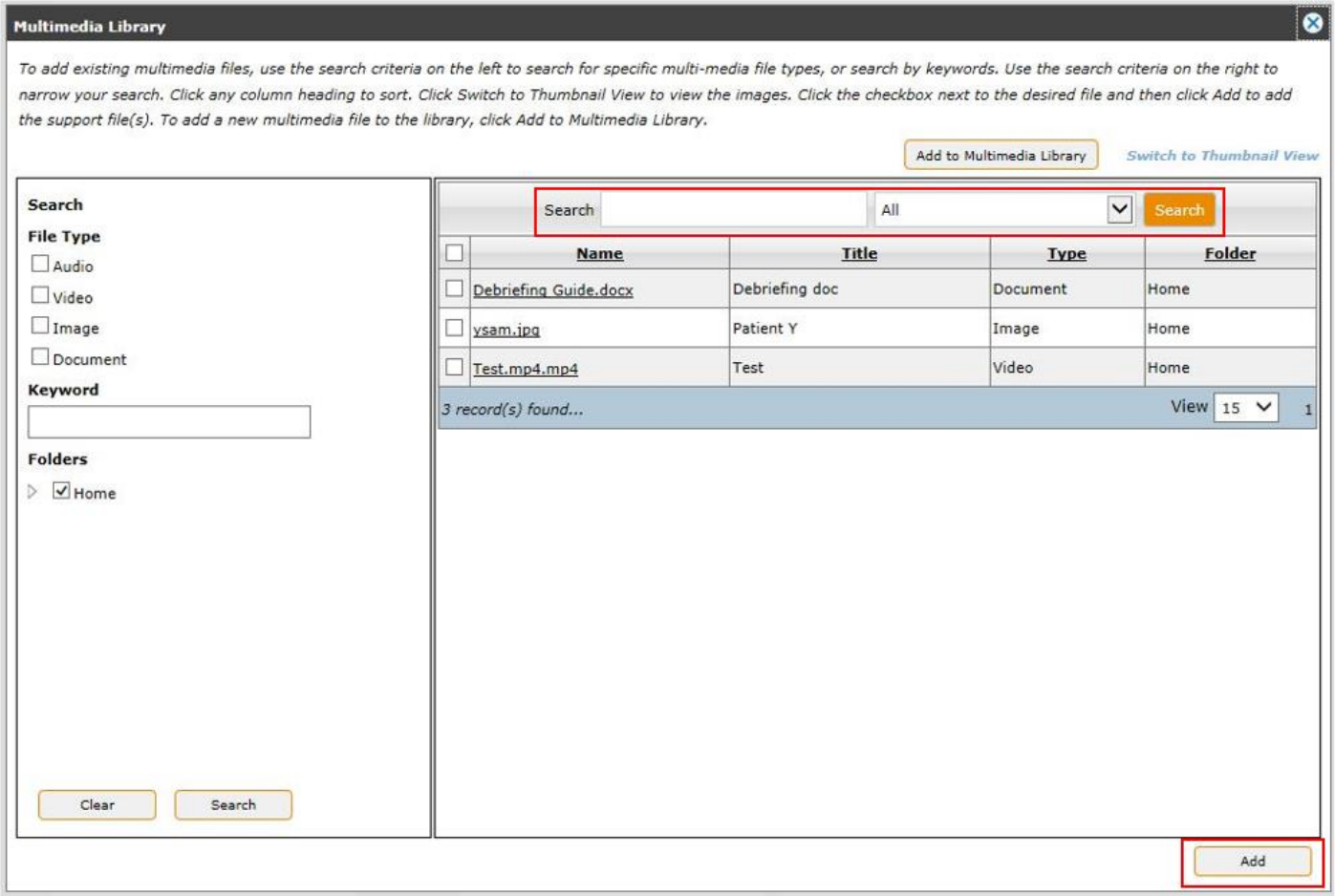
1. Click the **Browse** button.
2. Navigate to the file name to be uploaded and click the **Open** button.
3. Click the **Upload** button.

To view uploaded file:

1. Click the link of the file name just uploaded.
2. The **File Viewer** window will pop up.

If this is a document (.doc, .docx, .xls, xlsx, .pdf, .ppt, .pptx, .txt) and you are unable to preview it, then click the link to download the file. If this is an image (.bmp, .jpg, .jpeg, .GIF, .TIFF, .PNG), then use the controls (+/-) below the Image to zoom in or zoom out.

Multimedia Library



Add from Multimedia Library:

1. Click the **Add From Multimedia** button.
2. Select from the list of multimedia files already in the Video database, or search for a particular file by file Name, title of case or scenario, or file Type.
3. Or, use the Search area to the right to search by Audio, Video, image or Word document or type in keywords. Check the Home folder checkbox if you would like to search in any of those folders.
4. Click **Search**.
5. Click the **checkbox** to the left of the file name.
6. Click the **Add** button.

7. Only one file can be uploaded.
8. To delete uploaded Support File, click the **Clear** button next to the listed file.
9. Click the **Save Changes** button.

Scoring Help Document

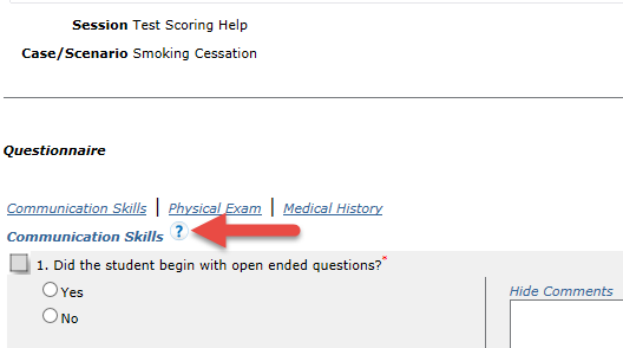
This is a document to provide additional direction to the evaluator(s) on how the learner performance assessment or SP performance assessment is to be scored.

To Add a Scoring Help Document:

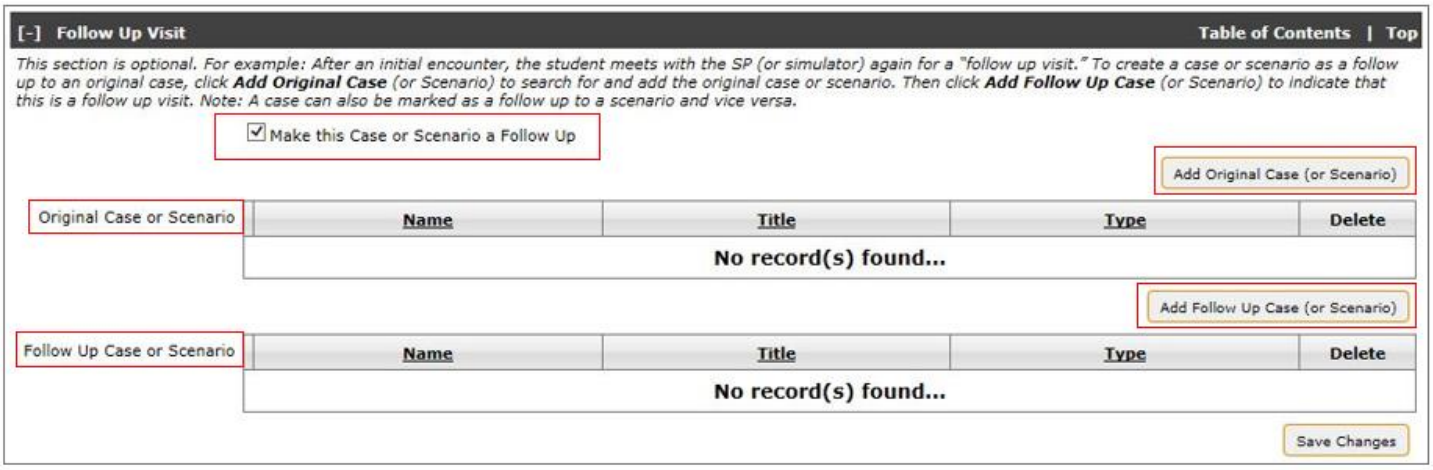
1. Add the document(s) with the clarification content to the Support Files section above the Scoring Help Document section.
2. Click the **Refresh** button.
3. Use the dropdown in the Scoring Help Document line to select the Support File that relates to that category.
4. Click **Save Changes** for the section.

Using the Scoring Help Document

1. Log in as an Evaluator (Educator or SP)
2. Click **Evaluate**.
3. There will be a ? next to the category(ies) that have Scoring Help Documents. Click on the ? to open the document.



Follow-Up Visit: Case



A case or scenario can have a Follow-Up Visit(s) associated with it, or it can be made a Follow-Up Visit and its original case can be designated here. Also, an SP case can be marked as a follow-up to a scenario and vice versa.

Application Workflow

► This case can be associated with another case or scenario as the original visit to a follow-up; or it can be defined as a follow-up visit to another case or scenario.

► If using an EHR patient with this case, the same EHR patient may be used for follow-up visits by identifying the pre-filled forms that were filled out in the original case and attaching them to the EHR patient when assigning the follow-up case.

► Follow-up cases or scenarios are searchable criteria.

Mark this case or Scenario a Follow-Up

1. If this is a follow-up visit to an initial visit, click the checkbox next to **Make this Case or Scenario a Follow-up** case. *When this checkbox is checked, the Add Original Case (or Scenario) button is available.*
2. Click **Add Original Case (or Scenario)** button to search for and add the original case or scenario.

Original Case

1. To add an original Case (or Scenario), click the **Add Original Case (or Scenario)** button.

2. The Cases and Scenarios listing window will pop up.
3. Search can be filtered by **All**, **Name**, **Title**, or **Type**.
4. Locate case or scenario to be the parent (*original case or scenario*) to this follow-up.
5. Click its **checkbox** and click the **Add** button.

Follow-up Case

There can be more than one follow-up visit to an original case.

1. To add an additional follow-up case, click the **Add Follow-up Case (or Scenario)** button.
2. The Cases and Scenarios window will pop up, listing cases and scenarios in the database. Searches can be filtered by **All, Name, Title, or Type.**
3. Select the **checkbox** next to the case or scenario to be listed as a follow-up case.
4. Click the **Add** button.
5. **Save Changes** for this section.

Evaluation Summary – SP Case

Use this section to:

► Add and/or edit **Performance Assessment** checklists for the SP or Faculty Evaluator to assess the learner's performance.

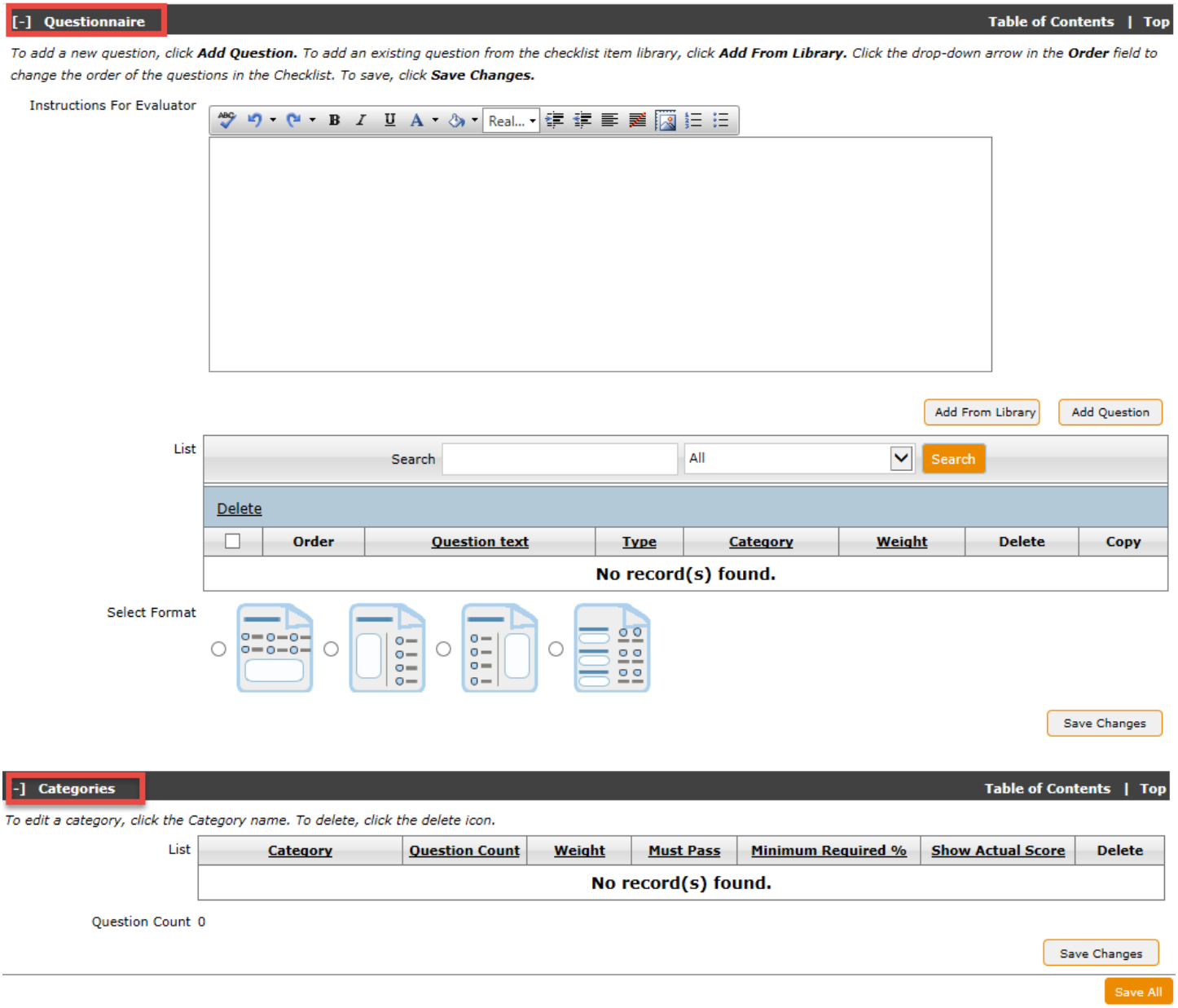
► Add and/or edit **SP Performance Assessment** checklists for an SP's Performance to be assessed by another SP or educator.

► Scores from the responses can be exported and generated in reports for each learner encompassing a range of session dates.

Performance Assessment

Performance Assessment Checklist Popup Window		Delete a Question or Category	Edit a question or category		Copy a question
Add from Library	Add Question From Library	Add New Question	Delete	Edit	Copy

SP Performance Assessment



Use this window to:

- Add questions to the checklist for the learner to be evaluated.
- Add any instructions for the evaluator.
- Select a layout format for the questionnaire.
- Make changes to the Category selected and the percentage required to pass this category.
- The evaluator that is assigned when the case is scheduled will receive the Evaluation checklist on their **Dashboard > To-Do** List.

- Apply and/or edit the checklist questions to assess the learner.
- Add scoring instructions for the evaluator.
- Specify style format of the questionnaire.
- Print and Preview the questionnaire.

Note: The same questions can be used for both a performance assessment and a self-assessment.

Note: If a change(s) is made to a performance assessment, a user has the ability to click **Save All** or **Save Changes** in the Performance Assessment area and all future sessions, in which the case is scheduled, appear so the case or scenario can be refreshed.

Performance Assessment Checklist Pop-up Window:

1. **Instructions for Scoring** –Enter scoring instructions for evaluator in the text field. *(Optional - Use the formatting mini toolbar to stylize your type)* **Save Changes**.

2. **List** - Add questions to the Questionnaire section by either clicking the **Add From Library** button or create new questions by clicking the **Add Question** button. See detailed instruction to add questions from here.

3. Questions can be searched by **Question Text, Response Type, Type, Category Name or Checklist Type** by selecting the appropriate drop-down menu next to the **Search** field and then clicking the **Search** button.

4. **Rearrange Question Order** – When multiple questions are added to the List Box, the order of the questions in the Checklist can be rearranged by clicking the drop-down arrow in the **Order** field and selecting the new chronological order.
5. **To delete Checklist** - Uncheck the item in the Evaluation Summary section on the Activity Page.

6. **Select Format** – Select the radio button for the style format of the checklist the evaluator will receive on their dashboard. The icons show the formation of the question and its comment box.

7. **Categories** will automatically populate in the Categories section when questions are added in the List box.

8. **Save Changes**.

9. **Buttons at the top of window:**

Cancel – Cancel without saving any changes.

Save All – Saves all changes made in this window.

Print - Window can be printed by selecting the **Print** button at the top right of window; you can also preview your checklist.

Refresh Session – if a case has already been scheduled in a session(s), clicking this will update the detail in the case in that session(s).

Back to top (Performance Assessment)

Delete a question or category:

Click the red **X** icon in the **Delete** column of the question or category to be deleted, or to delete the entire checklist, uncheck it in the Performance Assessment section of the Activity Page.

Back to top (Performance Assessment)

Edit a question or category:

1. Click on the name hyperlink.
2. The Question window will pop up.
3. Edit question, or if changing Categories, select a different category.
4. Click **Save Changes**.

If changing categories, the question response type and the grading will reflect the new category.

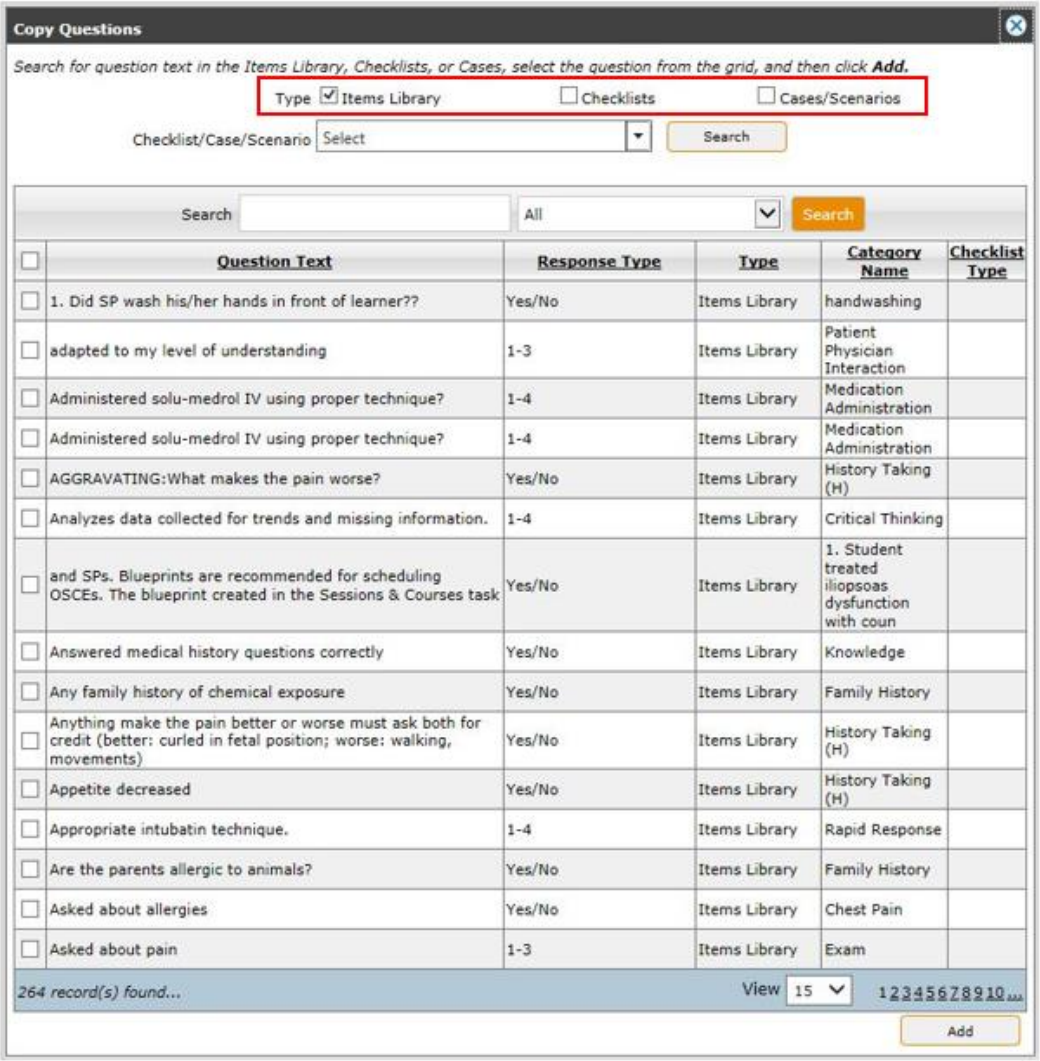
Back to top (Performance Assessment)

Copy a Question:

Copy – Click the **copy icon** under the Copy column to make a copy of a question.

Back to top (Performance Assessment)

Add From Library:



Add From Library Pop-up window: List questions already in the Items Library (Questions need to be in Active status and applicable as an assessment question.

Add Question from Library:

1. Click the **Add From Library** button above the List box.

2. The **Add From Library** button will open a **Copy Question** pop-up window, where a directory of questions from the **Items Library, Checklist, and Cases** *(that have been designated as an SP Assessment or Learner Assessment Checklist Type in* ***Cases & Scenarios > Checklist****)* can be listed.

3. Click the **Type** checkboxes to populate the Question list from the **Items Library, Checklists, and/or Cases areas.**

4. Question search can be filtered by **Question Text or Type** *(from the Items Library, Checklists or a Case)* by selecting the appropriate drop-down menu next to the **Search** field.

5. Click the **Search** button; the list will change according to the new search criteria.

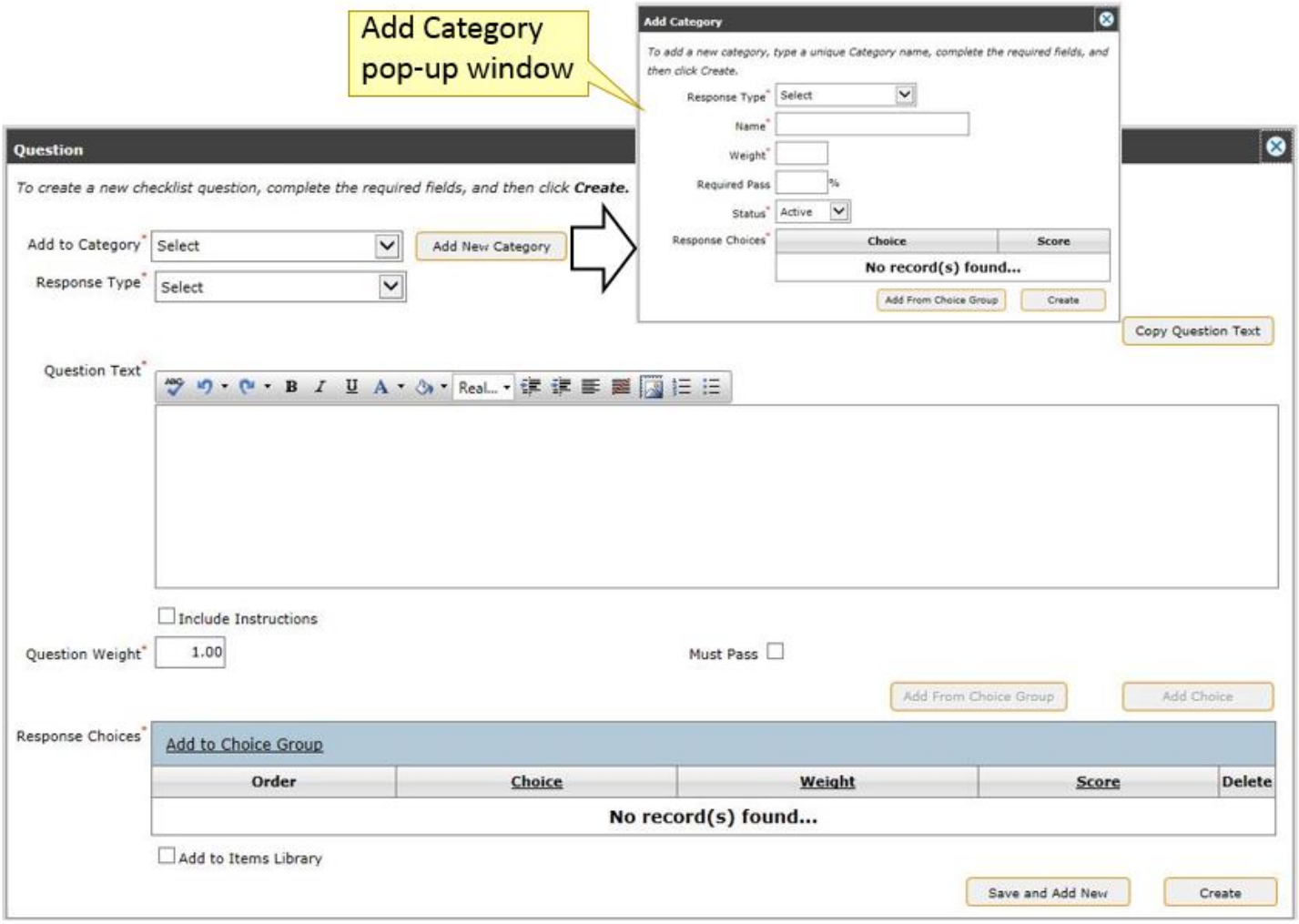
6. Click on the **checkbox** next to the question you want to add.

7. Click the **Add** button to add the question to the questionnaire.

8. The **Response Type** column indicates the type of answer response required for the question. This can be customized by clicking on the Question Text's hyperlink in the List box.

Back to top (Performance Assessment)

Add New Question:



Back to top (Performance Assessment)

Add Question

New questions can be created here *(This is the same as going to the Items Library > Questions > New)*. They can also be added from here to the Items Library so they can be available for use in any case or scenario.

1. Click the **Add Question** button (under the Questionnaire section).

2. A **Question** window will pop up where you can specify the Category, Question, Grading Information, and Question Response Type.

3. **Add to Category** – Select a Category that is already in the **Items Library > Categories** database by selecting the drop-down menu and selecting one of the categories listed. When the Category is selected, the accompanying **Response Type** (type of answers required) will be listed. The response type can be changed within the category by using the **Customize** button.

4. **Add New Category** – Click **Add New Category** button to define a new Category.

The Add New Category pop-up window:

Response Type – Select the type of response (*answer type*) from the drop-down menu. *(i.e., a Yes/No answer, a Likert Scale of 1-9, True/False, etc. You may use keyword scoring for free-text type questions, though this is not required. Free-text style questions may be read and scored by a faculty evaluator. When selecting **Text with Keywords**, identify the keywords and misspellings in the keyword dictionary. Enable keyword scoring for the question and then associate the keywords).*

Name – Type a name of the Category *(based on the subject matter of the questions that will be contained in the category, i.e., Communication Skills, Physical Exam, etc.)*.

Weight – Enter the weight of this category. A question needs to be weighted for the choice to be counted in the scoring process. The default value is 1. This is used for calculating the weighted average mean score for the category, when multiple questions within a category are used. Questions within a category can be weighted differently, and Categories can be weighted differently than other categories. The system will adjust the score according to weight given. A weight of zero means the data can be collected but it won't count in the scoring process.

Required Pass % -(*Optional*) The minimum overall score that is needed for a student to pass the case. A zero in this box denoted that there are no minimum pass requirements for the case.

Status – Select the status of the question. Active means it is actively in the system and can be used in future cases and scenarios. Retired means inactive and ineligible for future use until made active again; this is a better alternative to deleting it, which would remove it permanently.

Response Choices – Click on the hyperlink under the Choice column and define the answer choice that pertains to the Response Type that was selected, (i.e., Low/Moderate/Severe; or Poor/Good/Excellent, etc.) by labeling the choice in the Choice text field (a maximum of 255 characters are permitted at the Choice field).

Score – Indicate the amount of credit received by selecting this choice.

Click **Save** to return to the Add Category window.

When the fields are complete, click the **Create** button. A message window will pop up asking if you want to create additional categories; click **Yes** to add another category or click **No** to return to the Question window.

Back to the Question window:

5. If a new category was added in the previous step, it will be available in the drop-down menu. Select the **Category** for your question.

6. If you want to copy text from a preexisting question, click on the **Copy Question Text** button - when this button is selected, a **Copy Question Text** box will pop up allowing you to select a question from the list; the question text will now be copied and pasted into the **Question Text** box.

7. **Question Text** – Type the question in this field. *(Option - Use the formatting mini toolbar to stylize your type).*

8. **Include Instructions** – Click this checkbox if you want the instructions to be visible to the evaluator. When checked, the Instructions text field becomes visible allowing you to type instructions.

9. **Question Weight** – Enter question weight. A question needs to be weighted for the choice to be counted in the scoring process. The default value is 1.0. This is used for calculating the weighted average mean score for the category, when multiple questions within a category are used.

Questions within a category can be weighted differently, and some categories can be weighted differently than other categories. The system will adjust the score according to weight given.

10. **Must Pass** – Check this box if the correct response to this question is mandatory for the learner to pass the entire exercise. Checking this box will populate the Question Weight and Minimum Required percentage to pass fields. These are mandatory in order to specify the conditions to pass.

11. **Customize** – Clicking on this button will enable customization of the Response Choices and populate a **Reset to Default** button, an **Add From Choice Group** button and an **Add Choice** button:

    Reset to Default – This deletes the customization of the response choice and resets to default.

    Add From Choice Group – This allows you to add customized choice groups that are defined in the **Items Library > Choice Group** task. The list can be expanded by clicking on the + sign to reveal the choice details. Make your selection by checking checkboxes and clicking the **Add** button *(Be sure to adjust the Response Type to match the total number of choices).*

    Add Choice – This will add an additional Choice in the Response Choices box (a maximum of 255 characters are allowed at the **Choice** field). Clicking on this button will open a Choice pop-up window. If the checkbox for **Score and Weight is Applicable** is checked, Score and Weight needs to be indicated. Click the **Update** button.

    Add to Choice Group – Click this hyperlink to add your choices from the step above to the **Choice Group** database (**Items Library > Choice Group)** so it will be available for future use.

12. **Response Choices** – The order of the questions can be rearranged by selecting the numbers next to the questions.

13. **Limit Choices Required for Response** – When this is checked, the **Minimum Choices Required for Response** box and the **Maximum Choices Allowed** box will become available.

Minimum Choices Required for Response - set the minimum number of choices that can be selected.

Maximum Choices Allowed – set the maximum number of choices allowed to be selected.

14. **Score** – based on the weight of each response choice, the Minimum score and the Maximum score are indicated. These can be changed by clicking on the Choice hyperlink and changing the score for each response or by checking **Include Advanced Scoring Options**.

15. **Include Advanced Scoring Options** – when this is checked, the Advanced Scoring Options box becomes available.

    a. Click the **Add Scoring Options** button to specify customized scoring for each choice to customize the **Score, Weight and Criteria**.

    b. When **Score and Weight is Applicable** is checked, enter the Score amount, Weight and Criteria for this choice by checking the choice checkbox and inputting the Score, Weight and Criteria.

    c. **Score** – determine the amount of points credited for the correct answer. Check the correct choice and indicate that in the Score box. There may be multiple choices that are correct; if so, check those checkboxes and add the Score in the Score box. Add the Weight in the Weight box and then add the criteria.

    d. **Criteria** – (*number of correct choices to receive the score*) Specify the criteria for the learner to pass this question; click the checkbox next to the choice(s) designated as the correct answer(s). Indicate the number of choices that are checked in the Criteria box.

       For example: If there are 3 choices and 2 are correct or are eligible to receive the amount of credit indicated by the Score, check those 2 choices and add the weight and the score for those choices in the Criteria box (indicate 2).

    e. Click the **Add** button.

f. Repeat for each choice by clicking on the **Add Scoring Options** button in the Response Choices box.

g. Indicate the incorrect choice by selecting that choice's checkbox and adding 0 in the criteria box. Also put 0 in the Score box with a Weight of 1. A negative number can be indicated if points will be deducted for the incorrect choice.

h. **Weight** must be at least 1 just so the data is collected; the Weight is not the score.

i. Click the **Save Changes** button.

16. **Add to Items Library** – Click this box to add the question to the Items Library database. This will enable the question to be available for any SP case or scenario. Clicking on this checkbox will populate:

    Applicable Checklists – SP Performance or Learner Self-Assessment: select either or both of these if the question can also be applied to these checklists.

17. **Save and Add New** – Click this button if you want to save this question and add additional questions. If not, click **Create**.

Back to top (Performance Assessment)

Delete a Question:

*Click the red **X** icon in the **Delete** column of the question to be deleted, or to delete the entire checklist, uncheck it in the Evaluation Summary section.*

Back to top (Performance Assessment)

Edit a Question:

1. Click on the question name hyperlink.
2. The Question window will pop up.
3. Edit the question.
4. Click **Save Changes**.

Back to top (Performance Assessment)

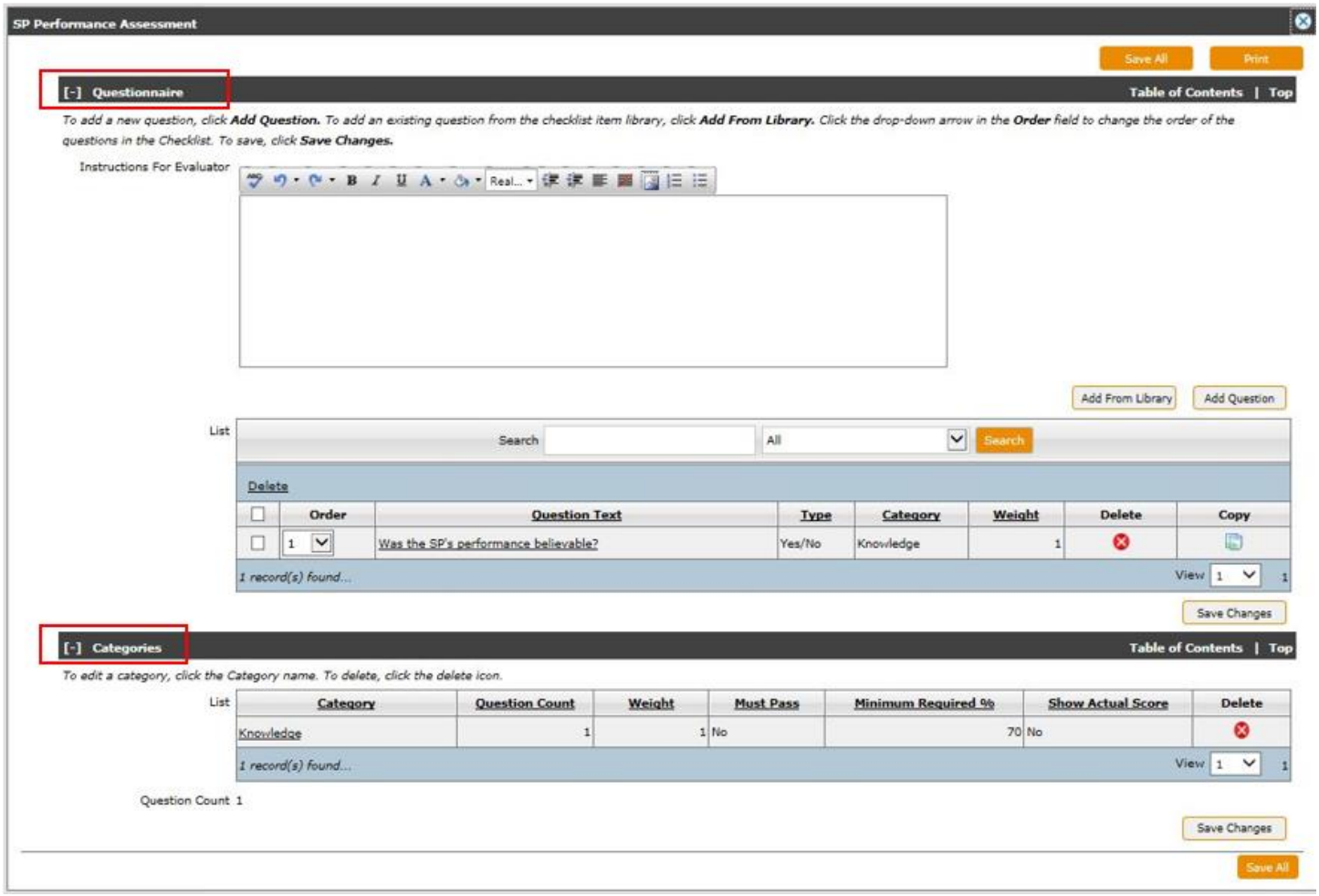
Copy a Question:

Copy – Click the **copy icon** under the Copy column to make a copy of a question.

Back to top (Performance Assessment)

SP Performance Assessment

SP Performance Assessment Checklist Pop-up Window	Add from Library	Add New Question	SP Performance – Add Question	Add New Category



Use this window to:

► Add questions to the checklist for the SP to be evaluated.

► Add any instructions for scoring.

► When the evaluator logs into their portal, the Assessment will be on **the Video task group in the Evaluations section.**

► Add instructions for the evaluator (a faculty member, or another SP).

► Apply and/or edit the checklist questions to assess the SP's performance.

► Print or Preview the questionnaire; you can print a practice SP checklist.

► SP Assessment segment of the encounter can be disabled at the Session Scheduling level.

Back to top (Performance Assessment)

SP Performance Assessment Checklist Pop-up Window

1. Click the SP Performance Assessment hyperlink in the Evaluation Summary section of the Activity Page.
2. **Instructions for Scoring** - Type in any instructions pertaining to scoring for the evaluator in this text field. *(Optional - Use the formatting mini toolbar to stylize your type.)*
3. Add questions in the **List** box by either clicking the **Add From Library** button or create new questions by clicking the **Add Question** button. *See detailed instructions to add questions here.*
4. Questions can be searched by **Question Text**, **Response Type, Type**, **Category Name** or **Checklist Type** by selecting the appropriate drop-down menu next to the **Search** field and then clicking the **Search** button.
5. **Rearrange Question Order** – When multiple questions are added to the List box, the order of the questions in the Checklist can be rearranged by clicking the drop-down arrow in the Order field and selecting the new chronological order.
6. To save, click **Save Changes**.
7. The **Categories** field should now list the categories of the questions that were added to the Questionnaire List area.
8. **Save Changes**.
9. **Buttons at the top of window**:

   Save All – Saves all changes made in this window.

   Print - Window can be printed by selecting the **Print** button at the top right of window.

   To Delete a question:

   *Click the red **X** icon in the **Delete** column of the question to be deleted, or to delete the entire checklist, uncheck it in the Evaluation Summary section.*

   To edit a question:

   1. Click on the question name hyperlink.
   2. The Question window will pop up.
   3. Edit the question.

4. Click **Save Changes**.

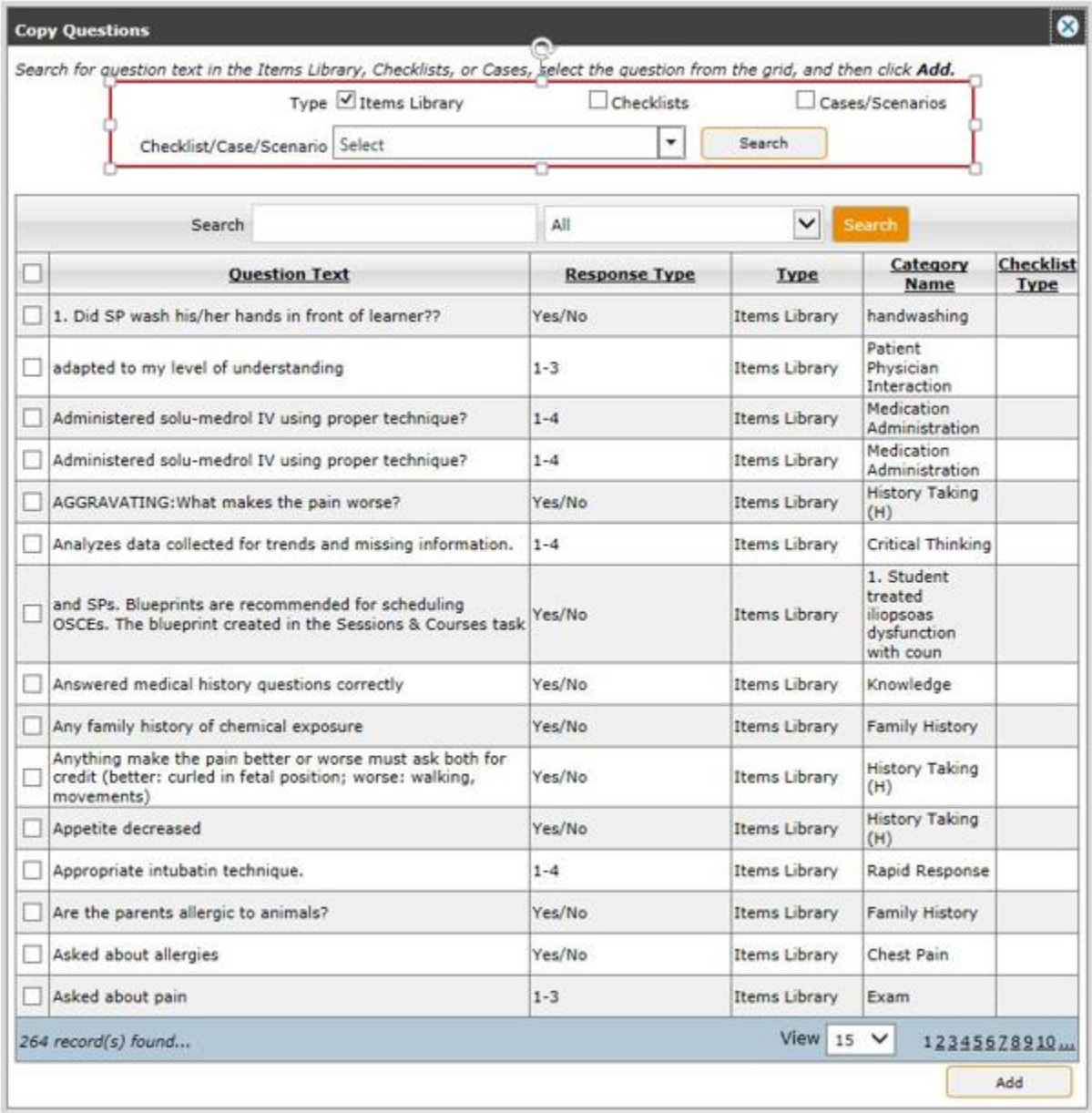
Copy a question:

Copy – Click the **copy icon** under the Copy column to make a copy of a question.

Back to top (Performance Assessment)

Back to top (SP Performance Assessment)

Add From Library:



Add From Library Pop-up window: List questions already in the Items Library (Questions need to be in Active status and applicable as an Assessment question.)

To add questions from Library:

1. Click the **Add From Library** button above the List box.

   The **Add From Library** button will open a **Copy Question** pop-up window, where a directory of questions from the **Items Library, Checklist, and Cases** *(that have been designated as an SP Assessment or Learn Assessment Checklist Type in* ***Cases & Scenarios > Checklist****)* can be

listed.

2. Click the **Type** checkboxes to populate the Question list from the Items Library, Checklists, and/or Cases areas.

3. Filter questions by **Question Text, Response Type, Type, Category Name or Checklist Type** *(from the Items Library, other Checklists or other Cases).* Select the appropriate drop-down menu next to the **Search** field.

4. Click the **Search** button; the list will change according to the new search criteria.

5. Click on the **checkbox** next to the question you want to add.

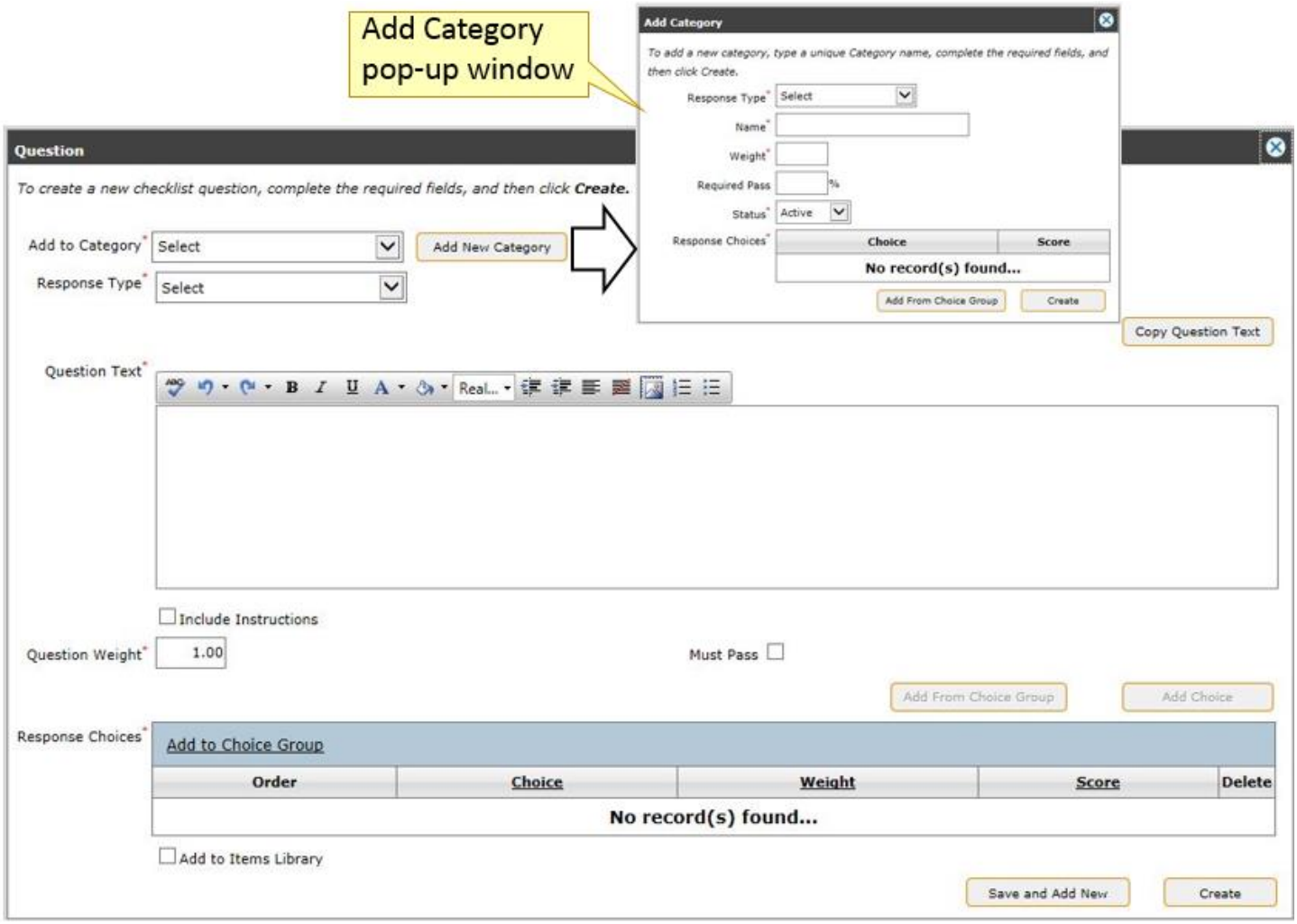
6. **Response Type** column indicates the type of answer response required for the question. This can be customized by clicking on the Question Text's hyperlink in the List box.

7. Click the **Add** button to add the question to the questionnaire.

Back to top (Performance Assessment)

Back to top (SP Performance Assessment)

Add New Question:



SP Performance Question Pop-up Window: To create a New Question, click the **Add Question** button. Newly created questions can be added to the **Items Library** for future use.

Back to top (Performance Assessment)

Back to top (SP Performance Assessment)

SP Performance – Add Question

New questions can be created here *(This is the same as going to the Items Library > Questions > New)* They can also be added from here to the Items Library so they can be available for use in any case or scenario.

1. Click the **Add Question** button.

2. A **Question** window will pop up where you can specify the Category, Question, Grading Information, and Question Response Type.

3. **Add to Category** – Select a Category that is already in the **Items Library > Categories** database by selecting the drop-down menu and selecting one of the categories listed. When the Category is selected, the accompanying **Response Type** (type of answers required) will be listed. The response type can be changed within the category by using the **Customize** button. **Use Default Scoring** resets scoring to match the rest of the category.

Back to top (Performance Assessment)

Back to top (SP Performance Assessment)

Add New Category

4. **Add New Category** – Click **Add New Category** button to define a new Category.
5. The **Add New Category** pop-up window.

Response Type – Select the type of response (answer type) from the drop-down menu *(i.e., a Yes/No answer, a Likert Scale of 1-9, True/False, etc. You may use keyword scoring for free-text type questions, though this is not required. Free-text style questions may be read and scored by a faculty evaluator. When selecting **Text with Keywords**, identify the keywords and misspellings in the keyword dictionary. Enable keyword scoring for the question and then associate the keywords)*.

Name – Type a name of the Category *(based on the subject matter of the questions that will be contained in the category, i.e., Communication Skills, Physical Exam, etc.)*.

Weight – Enter the weight of this category. A question needs to be weighted for the choice to be counted in the scoring process. The default value is 1. This is used for calculating the weighted average mean score for the category, when multiple questions within a category are used. Questions within a category can be weighted differently, and some categories can be weighted differently than other categories. The system will adjust the score according to the weight given. A weight of zero means the data can be collected but it won't count in the scoring process.

Required Pass % - (*Optional*) The minimum overall score that is needed for a student to pass the case. A zero in this box denotes that there are no minimum pass requirements for the case.

Status – Select the status of the question. Active means it is actively in the system and can be used in future cases and scenarios. Retired means inactive and ineligible for future use until made active again; this is a better alternative to deleting it, which would remove it permanently.

Response Choices – click on the hyperlink under the Choice column and define the answer choice that pertains to the Response Type that was selected, (i.e., Low/Moderate/Severe; or Poor/Good/Excellent, etc.) by labeling the choice in the Choice text field.

Score –Indicate the amount of credit received by selecting this choice.

Click **Save** to return to the Add Category window.

a. When the fields are complete, click the **Create** button.

b. A message window will pop up asking if you want to create additional categories; click **Yes** to add another category or click **No** to return to the Question window.

Back to Question window

6. If a new category was added in the previous step, it will be available in the drop-down menu. Select the **Category** for your question.
7. **Copy Question Text** button - when this button is selected, a **Copy Question** text box will pop up allowing you to select a question from the list; the question text will now be copied and pasted into the **Question Text** box.
8. **Question Text** – Type the question in this field. *(Option - Use the formatting mini toolbar to stylize your type)*
9. **Include Instructions** – Click this checkbox if you want the instructions to be visible to the evaluator.
10. **Question Weight** – Enter question weight. A question needs to be weighted for the choice to be counted in the scoring process. The default value is 1.0. This is used for calculating the weighted average mean score for the category, when multiple questions within a category are used. Questions within a category can be weighted differently, and some categories can be weighted differently than other categories. The system will adjust score according to the weight given. A weight of zero means the data can be collected but it won't count in the scoring process.
11. **Must Pass** – Check this box if the correct response to this question is mandatory for the learner to pass the entire exercise. Checking this box will populate the **Question Weight** and **Minimum Required** percentage to pass fields. These are mandatory in order to specify the conditions to

pass.

12. **Customize** – Clicking on this button will enable customization of the Response Choices and populate a **Reset to Default** button, an **Add From Choice Group** button and an **Add Choice** button:

    Reset to Default – Deletes the customization of the response choice and resets to default.

    Add From Choice Group – Allows you to add a customized choice groups that are defined in **Items Library > Choice Group** task. The list can be expanded by clicking on the + sign to reveal the choice details. Make selection by checking checkboxes and clicking the **Add** button. *(Be sure to adjust the Response Type to match the total number of choices.)*

    Add Choice – This will add an additional Choice in the Response Choices box (a maximum of 255 characters are allowed at the **Choice** field). Clicking on this button will open a Choice pop-up window. If the checkbox for **Score and Weight is Applicable** is checked, Score and Weight needs to be indicated. Click the **Update** button.

    Add to Choice Group – Click on this hyperlink to add your choices from the step above to the **Choice Group** database (***Items Library > Choice Group***) so it will be available for future use.

13. **Response Choices** – The order of the questions can be rearranged by selecting the numbers next to the questions.

14. **Limit Choices Required for Response** – When this is checked, the **Minimum Choices Required for Response** box and the **Maximum Choices Allowed** box will become available.

    Minimum Choices Required for Response - Set the minimum number of choices that can be selected.

    Maximum Choices Allowed – Set the maximum number of choices allowed to be selected.

15. **Score** – Based on the weight of each response choice, the Minimum score and the Maximum score are indicated. These can be changed by clicking on the Choice hyperlink and changing the score for each response or by checking **Include Advanced Scoring Options**.

16. **Include Advanced Scoring Options** – When this is checked, the Advanced Scoring Options box becomes available.

    a. Click the **Add Scoring Options** button to specify customize scoring for each choice to customize the Score, Weight and Criteria.

    b. When **Score and Weight is Applicable** is checked, enter the Score amount, Weight and Criteria for this choice by checking the choice checkbox, inputting the Score, Weight and Criteria.

c. **Score** – determine the amount of points credited for the correct answer. Check the correct choice and indicate it in the Score box. There may be multiple choices that are correct; if so, check those checkboxes and add the Score in the score box. Add the Weight in the weight box and then add the criteria (number of correct choices to receive the score).

d. **Criteria** – To specify the criteria for learner to pass this question, click the checkbox next to the choice(s) designated as the correct answer(s). Indicate the number of choices that are checked in the Criteria box.

   For example: If there are 3 choices and 2 are correct or are eligible to receive the amount of credit indicated by the Score, check those 2 choices, add the weight and the score for those choices and in the Criteria box, indicate 2.

e. Click the **Add** button.

f. Repeat for each choice by clicking on the **Add Scoring Options** button in the Response Choices box.

g. Indicate the incorrect choice by selecting that choice's checkbox and adding 0 in the criteria box. Also put 0 in the Score box with a Weight of 1. A negative number can be indicated if points will be deducted for the incorrect choice.

h. **Weight** must be at least 1 just so the data is collected; the Weight is not the score.

i. Click the **Save Changes** button.

17. **Add to Items Library** – click this box to add question to the Items Library database. This will enable the question to be available for any SP case or scenario. Clicking on this checkbox will populate:

18. **Applicable Checklists** – SP Performance or Learner Self-Assessment: select either or both of these if the question may also be applied to these checklists.

19. **Save and Add New** – click this button if you want to save this question and add additional questions. If not, click **Create.**

Delete a question:

*Click the red **X** icon in the **Delete** column of the question to be deleted, or to delete the entire checklist, uncheck it in the Evaluation Summary section.*

Edit a question:

1. Click on the question name hyperlink.

2. The Question window will pop up.
3. Edit the question.
4. Click **Save Changes**.

Copy a question:

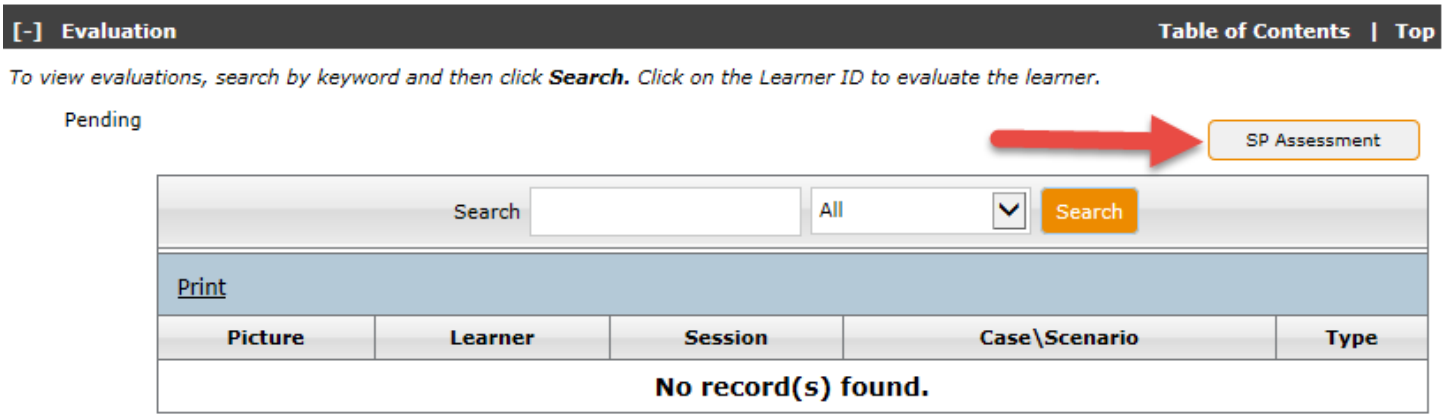
Copy – Click the **Copy** icon under the Copy column to make a copy of a question.

Back to top (Performance Assessment)

Back to top (SP Performance Assessment)

Complete the SP Performance Assessment

1. The evaluator logs in.
2. Click on the **Video** Task Group.
3. Navigate to the Evaluation section. The SP Performance Assessment is on the top right of the section.
4. Click on the **SP Assessment** button.
5. Complete the assessment.

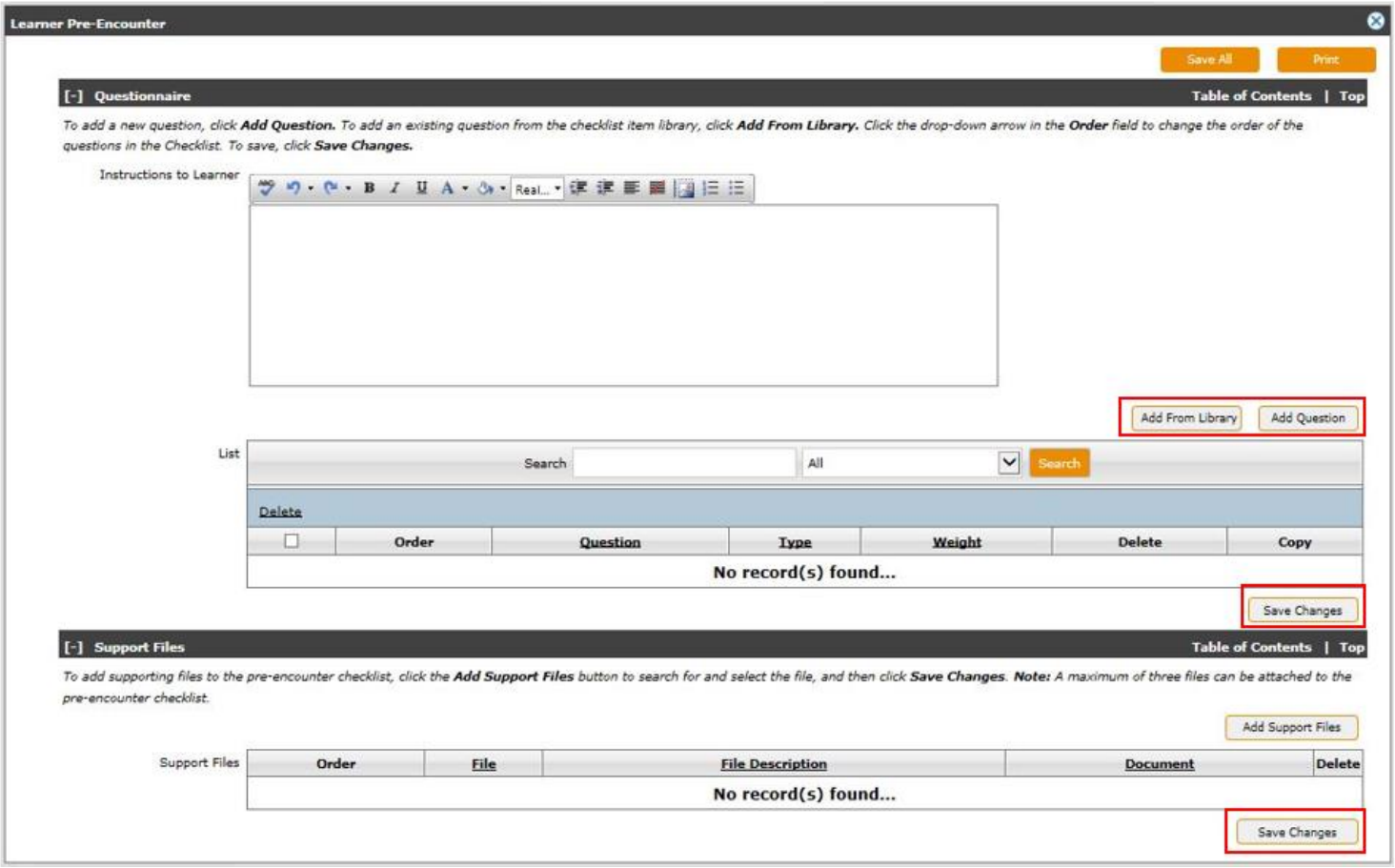


Back to top (Performance Assessment)

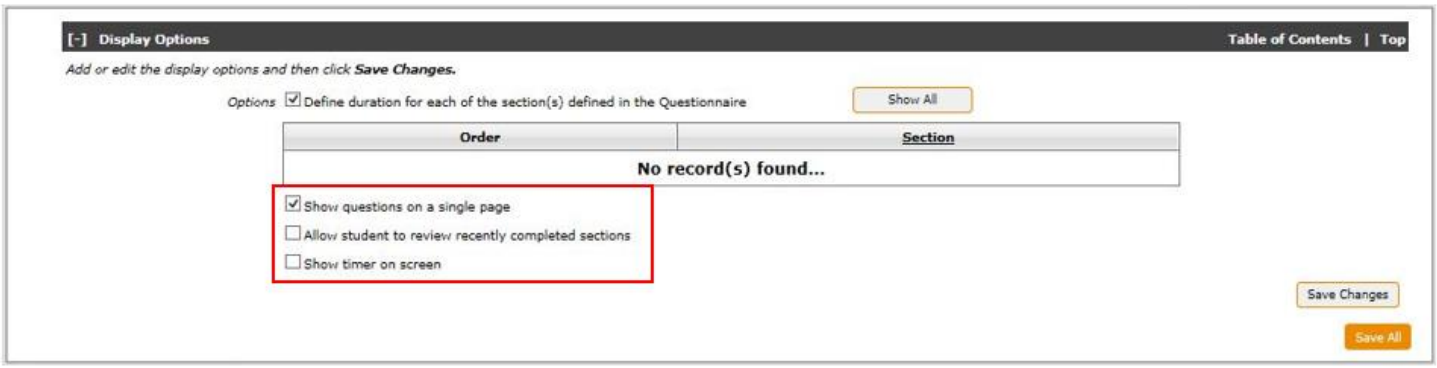
Back to top (SP Performance Assessment)

Learner Assessment – SP Case

Learner Pre-Encounter



► Use this section to create questions to be included in a questionnaire to be made available to the learner before the SP encounter. You can also create support files.



► Select questionnaire display options for learner.

► When the assigned learner logs onto the portal, the checklist will be on his or her **Dashboard > To Do** list.

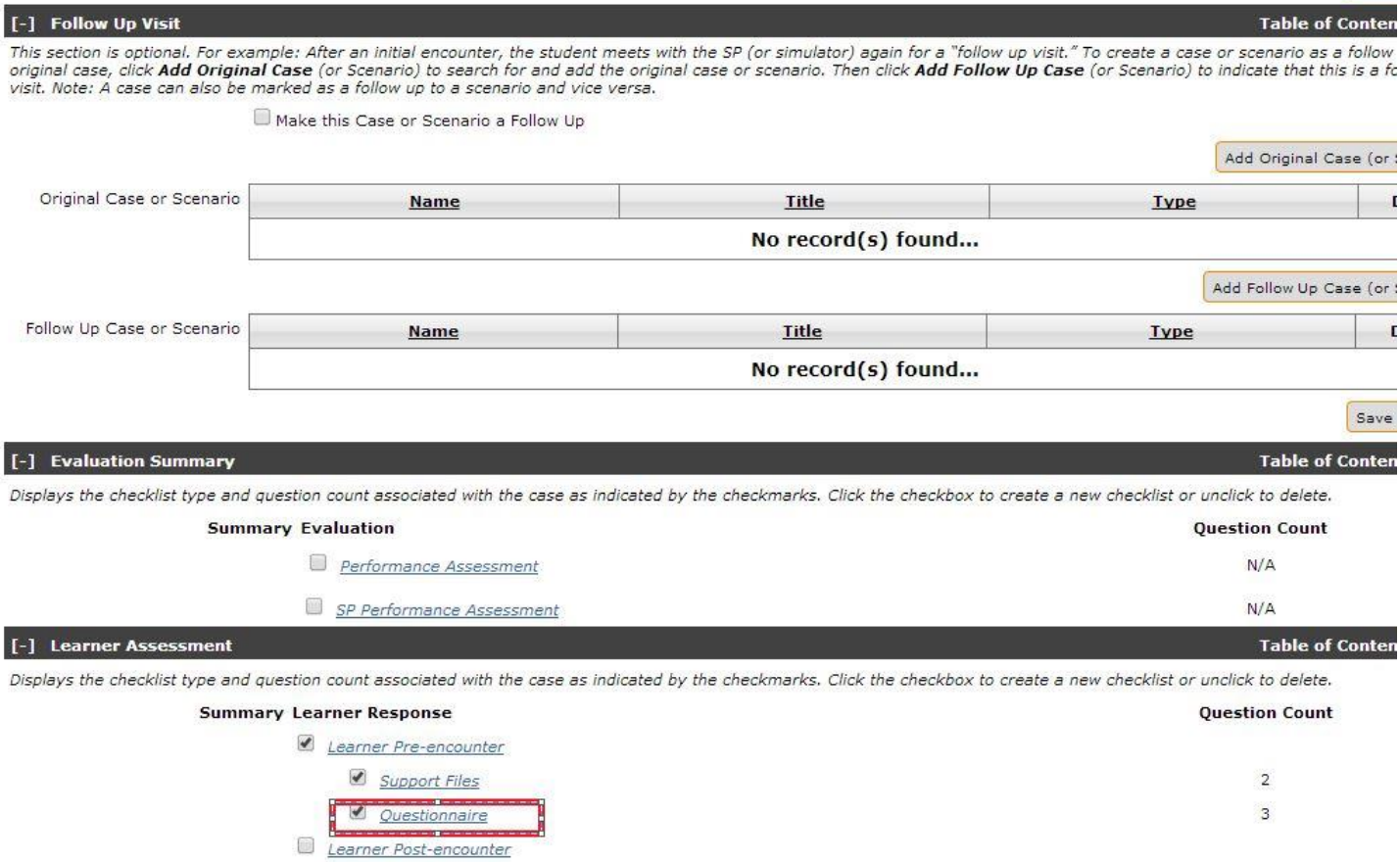
► Use this section to define Pre-encounter, Post-encounter, Survey, and Learner Self-Assessment checklists to evaluate the learner.

► Specify the order by which the material will be delivered to the learner.

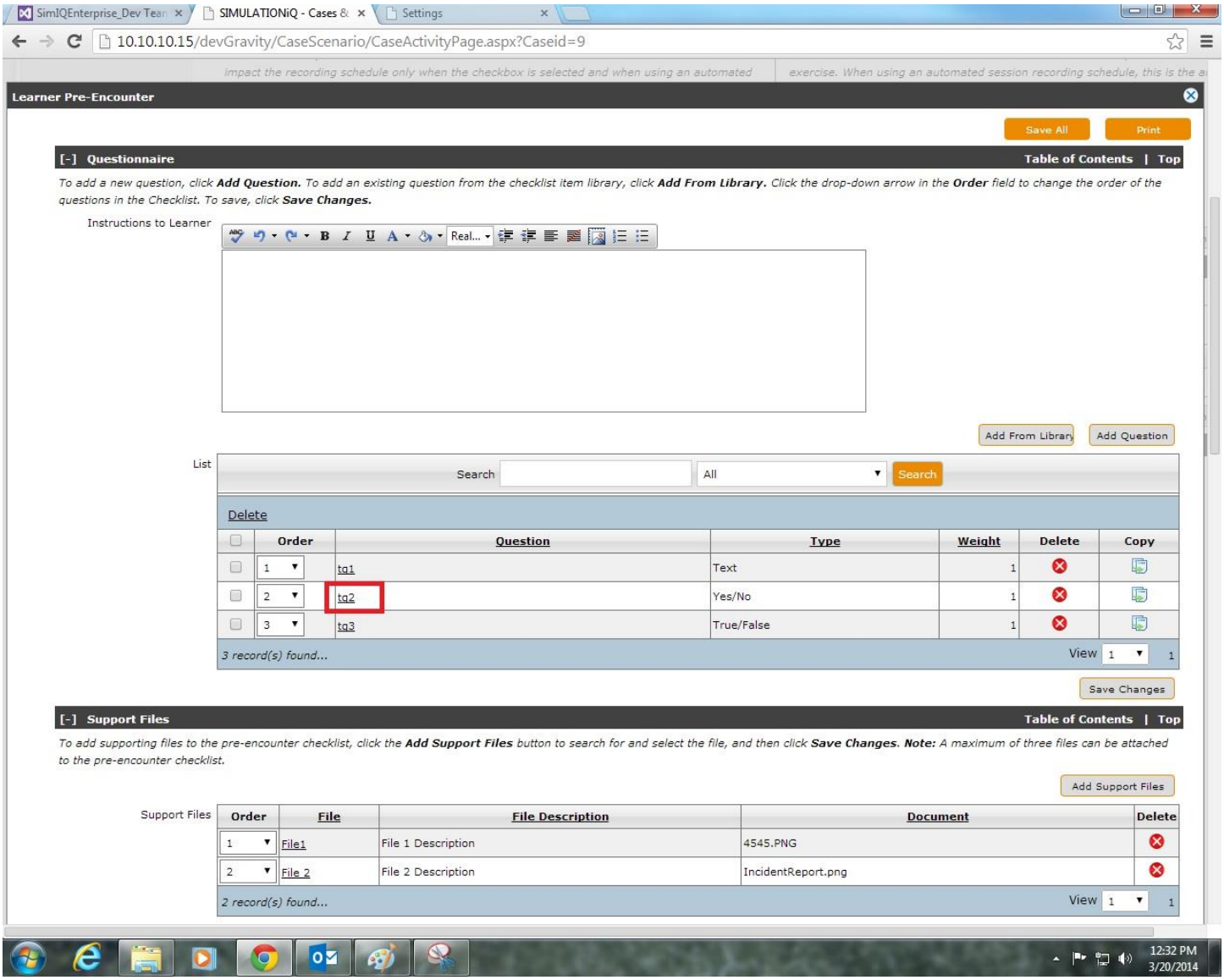
► The Learner Assessment segment of the encounter can be disabled at the Session Scheduling level.

Note: Please click the checkboxes for the display options first if making changes before reordering the sections. More information follows after clicking the drop-down icon.

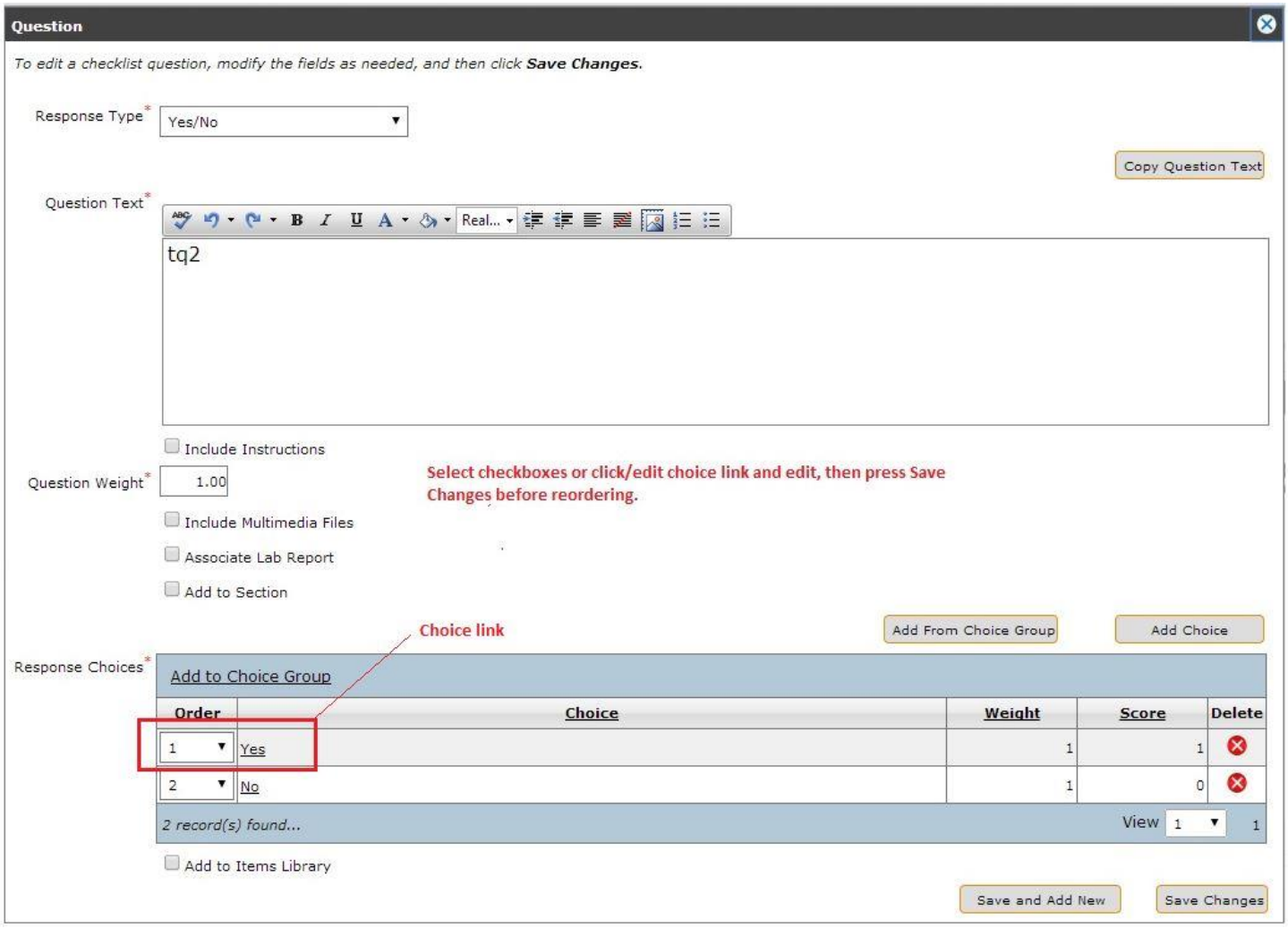
1. Select as checklist from the Evaluation Summary or Learner Assessment section by clicking on a hyperlink as shown:



2. From the Questionnaire section, click on a Question hyperlink to edit (as shown – this opens the Question dialog box):



3. From the Question dialog box, edit your Choice link selections by clicking a highlighted link as shown. <u>Save all edits to your selections before reordering your Choice selections by clicking on the numbered drop-down arrows</u>.



Learner Pre-Encounter

Support Files	Questionnaire	Display Options	Add Question

Learner Post-Encounter
Survey
Learner Self-Assessment

► Use this section to add Learner Pre-encounter questions and Support files for the learner to access before the SP encounter.

► This is not a mandatory component of the case, but does allow you the ability to define an activity for your learner prior to the SP encounter. Documents and multimedia files may be uploaded here.

► The learner will access the Pre-encounter exercises by logging into the portal and selecting the Pre-encounter task function on their Dashboard To-Do List.

Support Files

Support Files – Documents, images or multimedia files used to support the Pre-encounter checklist items.

1. To add optional supporting files to the pre-encounter checklist, click the **Add Support Files** button to search for and select the file.
2. A Support Files window will pop up.
3. Type a Filename in the **File** text field.
4. Type a description of the file in **File Description**.
5. **Save Changes**.

   Note: A maximum of three files can be attached to the pre-encounter checklist.

Upload a file:

1. Click the **Browse** button.
2. Navigate to the file name to be uploaded; click the **Open** button.
3. Click the **Upload** button.
4. The name of your file appears.
5. To delete the uploaded file, click on the name of the file and click on the **Clear** button. Repeat the prior steps to upload a different file.
6. Click the **Update** button.

To view uploaded file:

a. Click the filename hyperlink of the file just uploaded.

b. The **Support File** window will pop up.

c. If this is a document (.doc, .docx, .xls, xlsx, .pdf, .ppt, .pptx, .txt) and you are unable to preview it, then click the link to download the file. If this is an image (.bmp, .jpg, .jpeg, .GIF, .TIFF, .PNG), then use the controls (+/-) below the Image to zoom in or zoom out.

Delete a Listing:

1. In the Learner Pre-encounter window, locate the file to be deleted.

2. Click the **X** in the Delete column to delete a listing.

To Edit a question:

1. Click on the question name hyperlink.

2. The Question window will pop up.

3. Edit the question.

4. Click **Save Changes**.

Copy a Question:

Click the **Copy** icon under the Copy column to make a copy of a question. *(Copying is beneficial if you want to make changes to an item without changing the original.)*

Back to Learner Pre-Encounter

Questionnaire:

Click on the Learner Pre-encounter hyperlink in the Learner Assessment section of the Activity Page.

The Learner Pre-encounter window will pop up:

1. **Instructions for Scoring** - Type in any instructions pertaining to scoring for the evaluator in this text field. *(Optional - Use the formatting mini toolbar to stylize your type. This is not visible to the learner.)*

2. Add questions in the List box by either clicking the **Add From Library** button or create new questions by clicking the **Add Question** button *(See detailed instructions to add new questions and Adding questions from the Library in next section).*

3. Questions can be searched by **Question Text, Response Type, Type,** or **Category Name** by selecting the appropriate drop-down menu next to the **Search** field and then clicking the **Search** button.

4. **Rearrange Question Order** – When multiple questions are added to the List box, the order of the questions in the Checklist can be rearranged by clicking the drop-down arrow in the Order field and selecting the new chronological order.

5. To save, click **Save Changes**.

6. **Buttons at the top of window:**

   Save All – This saves all changes made in this window.

   Print - Information can be printed by selecting the **Print** button at the top right of window.

Back to Learner Pre-Encounter

Display Options

► Define the options for displaying the checklist.

1. **Define Duration for Each of the Section(s) Defined in Questionnaire** – When this box is checked, the Question order can be rearranged.

2. **Rearrange Question Order** – When multiple items *(Questionnaire, Study Documents)* are added to the section above, the order can be rearranged by clicking the drop-down arrow in the Order field and selecting the new chronological order.

3. **Show questions on a single page** – When this box is checked, all the questions will appear on one page. If unchecked, each question will be on its own page.

4. **Allow student to review** recently completed Pre-encounter sections – This is available when **Show Questions** on a single page is selected. This allows learner to navigate back to a previous section of the Checklist.

5. **Show Section Name(s) as Headers** – When this box is checked, the Section Names that were defined in the Add Question window will be displayed as Section Headers.

6. **Show Timer on Screen** – A timer will be visible allowing learner to see how much time is left to complete the Pre-encounter exercises. When the timer expires, that section of the test ends and the next section is presented until the completion of checklist.

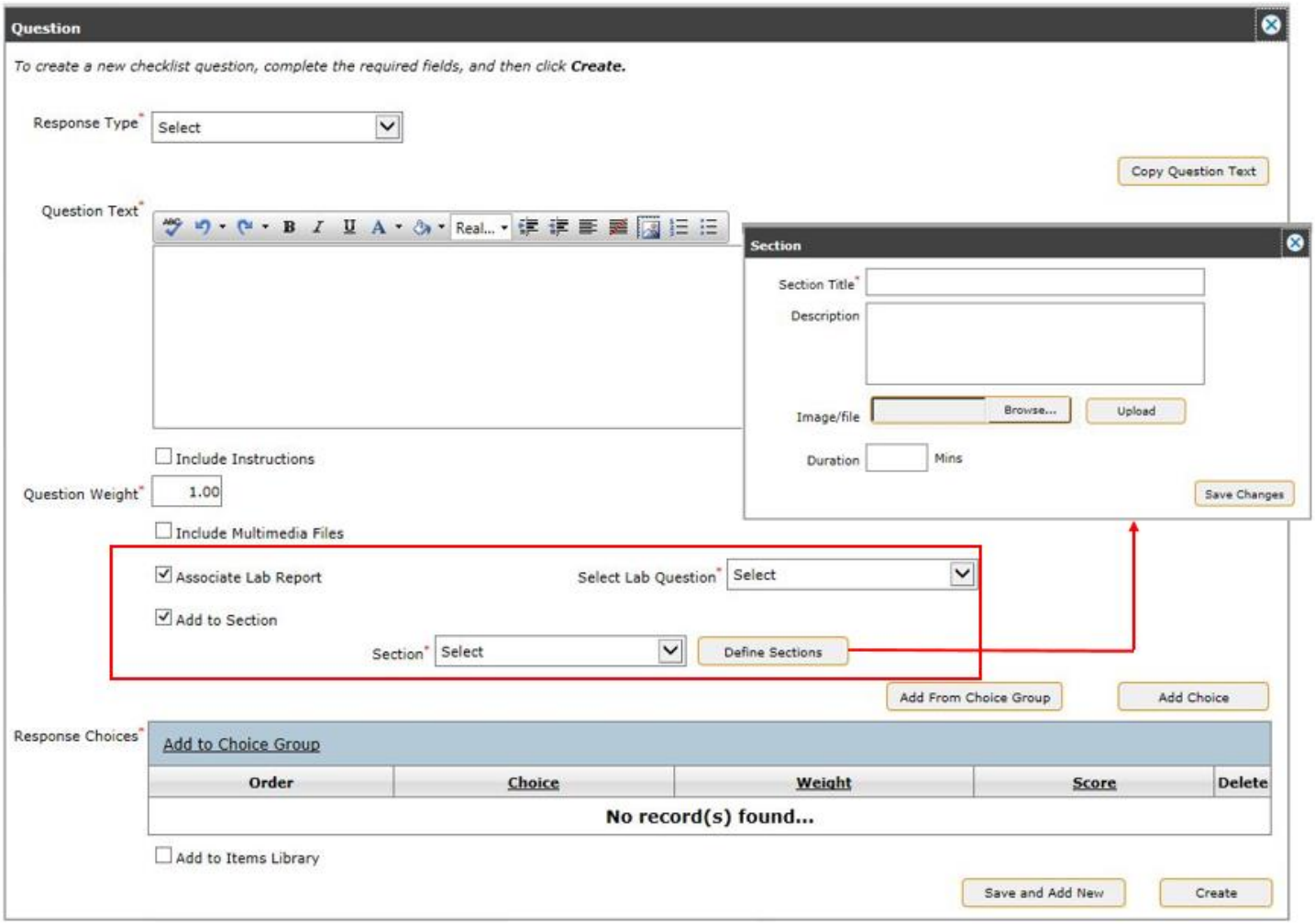
7. **Save Changes**.

Note: Please click the checkboxes for the display options first if making changes before reordering the sections.

Back to Learner Pre-Encounter

Add Question

New questions can be created here *(this is the same functionality as Items Library > Questions > New except for associating a lab report)* as well as more detailed specifications for the Pre-encounter exercises. They can also be added from here into the Items Library so they can be available for use in any case or scenario.



1. Click the **Add Question** button.

2. **Response Type** – Select the type of response (*answer type*) from the drop-down menu. *(i.e., a Yes/No answer, a Likert Scale of 1-9, True/False, etc. You may use keyword scoring for free-text type questions, though this is not required. Free-text style questions may be read and scored by a faculty evaluator. When selecting Text with Keywords, identify the keywords and misspellings in the keyword dictionary. Enable keyword scoring for the question and then associate the keywords.)*

2. **Copy Question Text** button - when this button is selected, a **Copy Question Text** box will pop-up allowing you to select a question from the list; the question text will now be copied and pasted into the **Question Text** box.

4. **Question Text** – Type the question in this field. *(Option - Use the formatting mini toolbar to stylize your type)*.

5. **Include Instructions** – Click this checkbox if you want the instructions to be visible to the learner.

6. **Question Weight** – Enter question weight. A question needs to be weighted for the choice to be counted in the scoring process. The default value is 1.0. This is used for calculating the weighted average mean score for the category, when multiple questions within a category are used. Questions within a category can be weighted differently, and some categories can be weighted differently than other categories. The system will adjust score according to weight given. A weight of zero means the data can be collected but it won't count in the scoring process.

7. **Add Multimedia**

   a. Click the **Add Multimedia** button.

   b. Select from the list of multimedia files already in the Video database, or search for a particular file by file Name, title of case or scenario, file Type, or view files in a particular folder.

   c. Or, use the Search area to the right to search by Audio, Video, image or Word document or type in keywords.

   d. Click **Search**.

   e. Click the **checkbox** to left of the file name.

   f. Click the **Add** button.

Only one file can be uploaded with a 2GB maximum file size.

8. **Associate Lab Report** – Check this checkbox if you want to associate a Lab Report file to be used with Lab Questions in the checklist.

   a. To associate a Lab Report to be used to answer lab questions, in the Response Type, select **Lab Report** in the drop-down menu.

   b. Type in Lab Question in the **Question Text** field.

   c. Click on the **Add Choice and Lab** button located above the Labs box.

   d. A **Choice** window will pop up. Enter the Lab file name in the Choice text field.

   e. Check **Score and Weight is Applicable** if you want to include a score and weight for this question.

   f. In the **Lab Report File** field, click the **Browse** button to navigate to the file you want to use for the Lab Report. When the file is located, click **Open**.

   g. Click the **Upload** button; the name of your file will appear.

   h. Click the **Clear** button if you want to delete the file.

   i. Click **Update**.

   j. Back in the Question window, your uploaded Lab Report File is listed in the Labs box.

k. Repeat if uploading additional files.

9. **Add to Section**- When this box is checked, select the Section drop-down menu to select a Section. If there are no Sections available in the dropdown or not an appropriate Section, click on the **Define Section** button to create a section(s) for the test.

   Define Section Title, Description, upload a supporting file (optional) and Duration in minutes the learner has to complete the section if a timer is enforced. **Save Changes**.

   Note: Sections are a means of sorting questions into similar topic divisions and are seen when the learner logs in to complete the questionnaire.

10. **Response Choices** – click on the hyperlink under the Choice column to edit the answer choice that pertains to the Response Type that was selected, (i.e., Low/Moderate/Severe; or Poor/Good/Excellent, etc.). Click **Save** after defining each Response Choice.

11. **Weight** – Enter the score weight of this category. A question needs to be weighted for the choice to be counted in the scoring process. The default value is 1.0. This is used for calculating the weighted average mean score for the category, when multiple questions within a category are used. Questions within a category can be weighted differently, and some categories can be weighted differently than other categories. The system will adjust score according to weight given. A weight of zero means the data can be collected but it won't count in the scoring process.

12. **Score** – Determine the amount of credit the question will be worth and indicate it in the **Score** box.

13. **Add From Choice Group** – Add customized choice groups that are defined from **Items Library > Choice Group** task.

    Add Choice –This will add an additional Choice in the Response Choices box. Clicking on this button will open a Choice pop-up window where the additional Choice label, Score and Weight can be entered (a maximum of 255 characters canbe entered at the **Choice** field). Click on the expand box of the type of choice you want to add, and then click **Add** to return to the Question window. *(Be sure to adjust the Response Type to match the total number of choices.)*

    Add to Choice Group – Click on this hyperlink to add your choices from the step above to the **Choice Group** database ***(Items Library > Choice Group)*** so it will be available for future use.

    Response Choices – The order of the questions can be rearranged by selecting the numbers next to the questions.

14. **Add to Items Library** – Clicking this checkbox will add this question to the **Items Library > Questions** database. Specify if you also want to apply it to a Learner Post-encounter and /or Survey checklist question. By checking these options, they will be searchable under those criteria.

15. **Save and Add New** – Click this button if you want to save this question and add additional questions. If not, click **Create**.

Back to Learner Pre-Encounter

Learner Post-Encounter

Questionnaire	Computer Exercise	Note	
Scoring Template	Display Options	Add From Library	Add Question

Learner Pre-Encounter
Survey
Learner Self-Assessment

Post-encounter questions are checklist items presented to the learner after the encounter. Checklists are applied to the case by attaching them to the Learner Assessment section of that case or scenario's activity page. The learner will assess the checklist on their To-Do List when they log in.

Use this section to:

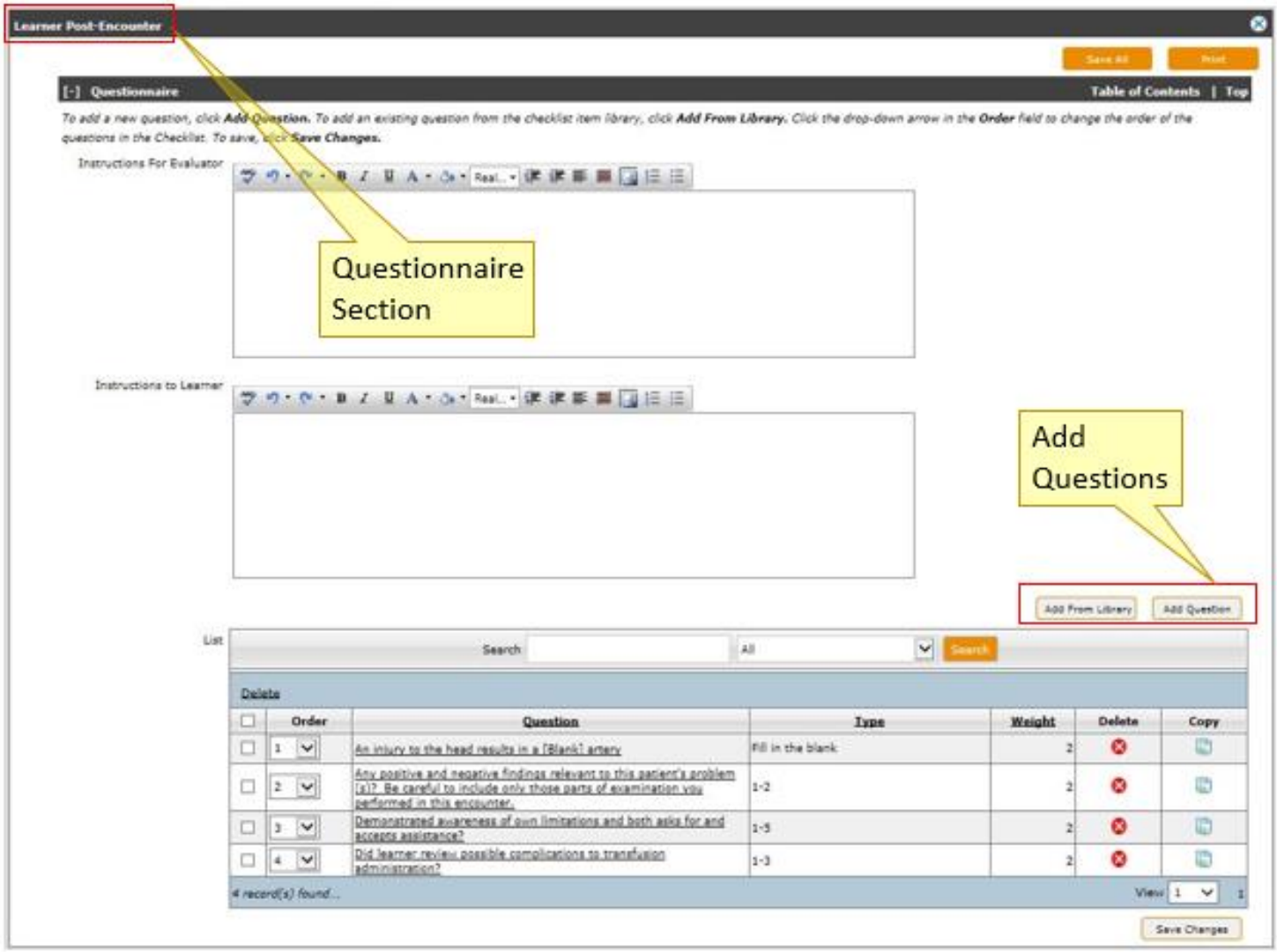
► Define the Post-encounter checklists (Questionnaire, Computer Exercises, SOAP or Patient Notes, SOAP or Patient Note Scoring Template) for the learner to access after the SP encounter.

► To specify the order and format by which the checklist will be delivered to the learner.

► The learner will access the Post-encounter exercises on their Dashboard To-Do-List.

► The Learner Post-encounter segment of the session can be disabled at the Session Scheduling level.

Learner Post-Encounter Questionnaire



Learner Post-encounter pop-up window:

1. Click the Learner Post-encounter Assessment hyperlink in the Learner Assessment section of the Activity Page (below) The Learner Post-encounter window will pop up allowing you to specify the instructions to the evaluator for scoring, instructions to the learner when taking the test, questionnaire, computer exercise, SOAP or Patient notes, SOAP or Patient note scoring Template, and how the format of the checklist items will be displayed.

2. **Instructions for Evaluator** - Type any instructions pertaining to scoring for the evaluator in this text field. *(Optional - Use the formatting mini toolbar to stylize your type. This is not visible to the learner.)*

3. **Instructions to Learner** – Enter instructions to be viewed by the learner when completing the Post-encounter checklist.

4. **Add questions** in the List box by either clicking the **Add From Library** button or create new questions by clicking the **Add Question** button. *(See detailed instructions to add new questions and Adding questions from the Library here.)*

5. Questions can be searched by **Question Text**, **Response Type, Type**, or **Category Name** by selecting the appropriate drop-down menu next to the **Search** field and then clicking the **Search** button.

6. **Rearrange Question Order** – When multiple questions are added to the List box, the order of the questions in the Checklist can be rearranged by clicking the drop-down arrow in the Order field and selecting the new chronological order. To add a question, press **Add**.

7. To save, click **Save Changes**.

8. **Buttons at the top of window**:

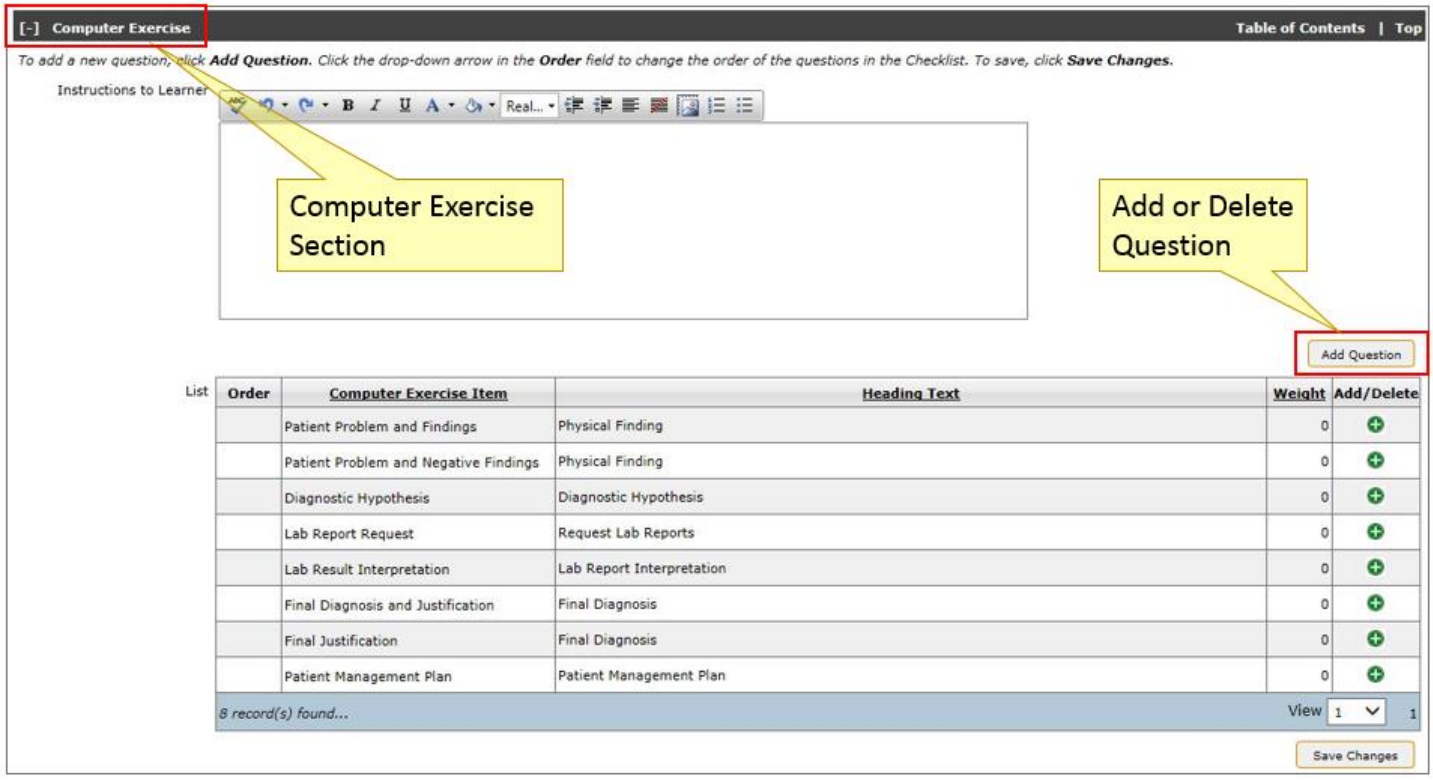
   Save All – This saves all changes made in this window.

   Print - Information can be printed by selecting the **Print** buttons at the bottom and top right of the activity page. You can also preview your checklist questions.

Back to Learner Pre-Encounter

Back to Learner Post-Encounter

Learner Post-Encounter Computer Exercise



► The Clinical Competency Computer Exercise is designed to encourage the student to submit findings, develophypotheses, order and evaluate lab results and finally determine a diagnosis and treatment plan. This will be presented to the student as a multi-step exercise.

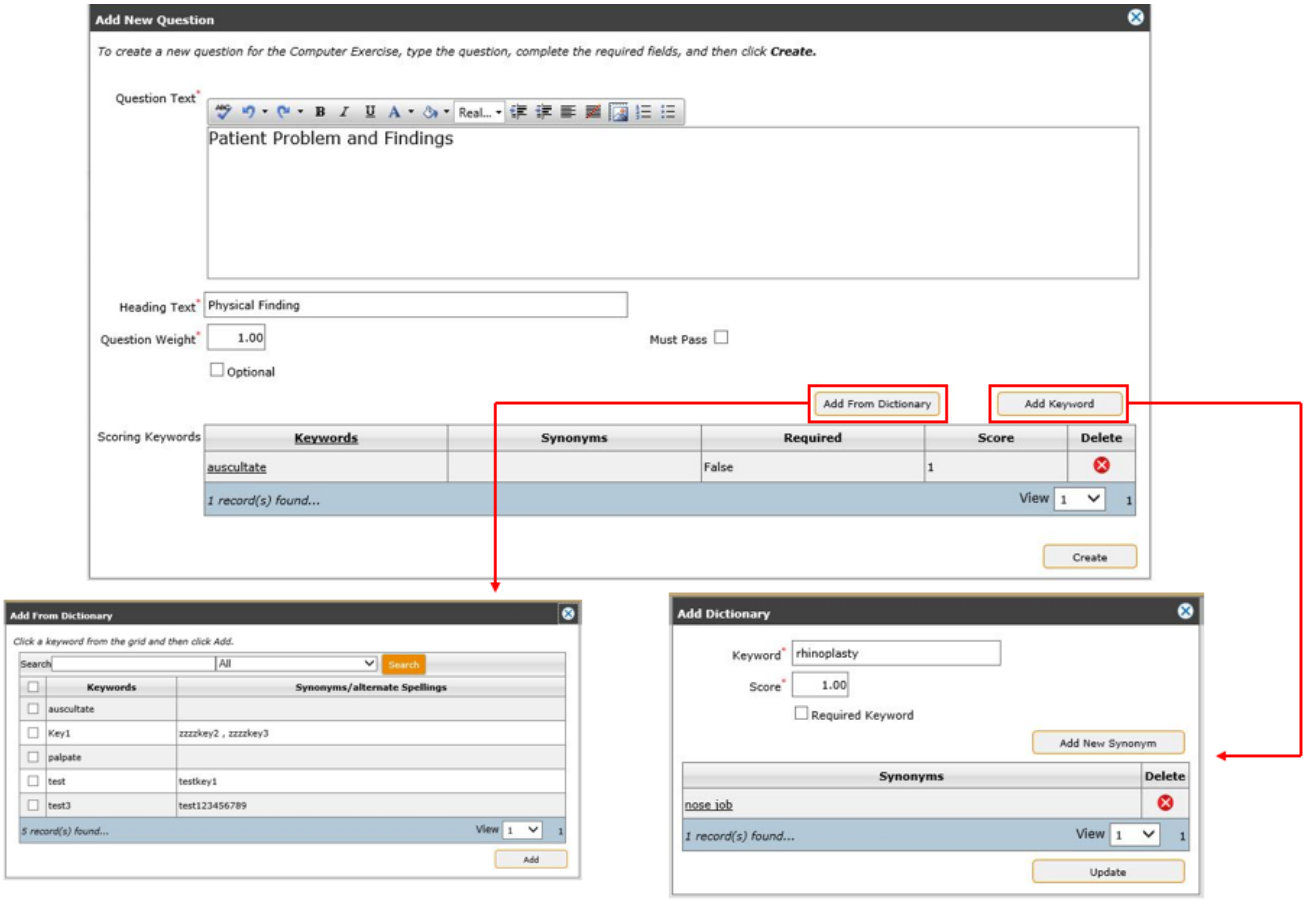
Complete the following sections:

1. **Instructions to Learner** – Enter instructions to be viewed by the learner when completing the Post-encounter checklist. *(Optional - Use the formatting mini toolbar to stylize your type. This is not visible to the learner.)*

2. **Add questions** in the List box by either clicking the  or create new questions by clicking the **Add Question** button.

3. Add/Delete An Existing Competency Exercise Item

Press  for an existing competency item and the following appears:



Use the default text or enter a question at the **Question Text** dialog box. Use the heading text or add another heading at the **Heading Text** field. Enter a **Question Weight** and click **Optional** if the question is optional for the learner. If the question is required for the learner to complete the checklist, click the **Must Pass** checkbox (a **Min Required** percentage between 1 and 100 must be entered).

Add an existing keyword by pressing the **Add From Dictionary** button or add a new keyword by pressing the **Add Keyword** button. Add a scoring value for a new keyword; click the **Required Keyword** checkbox if the keyword is required to answer the checklist question. After entering the question and pressing **Create**, the grid selection appears as follows:

List

Order	Computer Exercise Item	Heading Text	Weight	Add/Delete
1	Patient Problem and Findings	Physical Finding	1	
	Patient Problem and Negative Findings	Physical Finding	0	
	Diagnostic Hypothesis	Diagnostic Hypothesis	0	
	Lab Report Request	Request Lab Reports	0	
	Lab Result Interpretation	Lab Report Interpretation	0	
	Final Diagnosis and Justification	Final Diagnosis	0	
	Final Justification	Final Diagnosis	0	
	Patient Management Plan	Patient Management Plan	0	

8 record(s) found... View 1 1

Save Changes

When multiple questions are added to the List box, the order of the questions in the Checklist can be rearranged by clicking the drop-down arrow in the **Order** field and selecting the new chronological order.

4. Add a New Question

Press **Add Question**, and the same dialogs appear as those when selecting , only without the default question and heading text.

To save, click **Save Changes**. Press **Create** at the **Add New Question** dialog to save your questions.

5. *Buttons at the top of window:*

Save All – This saves all changes made in this window.

Print - Window can be printed by selecting the **Print** button at the top right of window.

Delete a Question:

a. In the Learner Post-encounter window, locate the question to be deleted.

b. Click the **X** in the **Delete** column to delete a question.

To Edit a question:

a. Click on the question name hyperlink.

b. The Question window will pop up.

c. Edit the question.

d. Click **Save Changes**.

Copy a question

a. Copy – Click the **copy icon** under the Copy column to make a copy of a checklist item.

Back to Learner Pre-Encounter

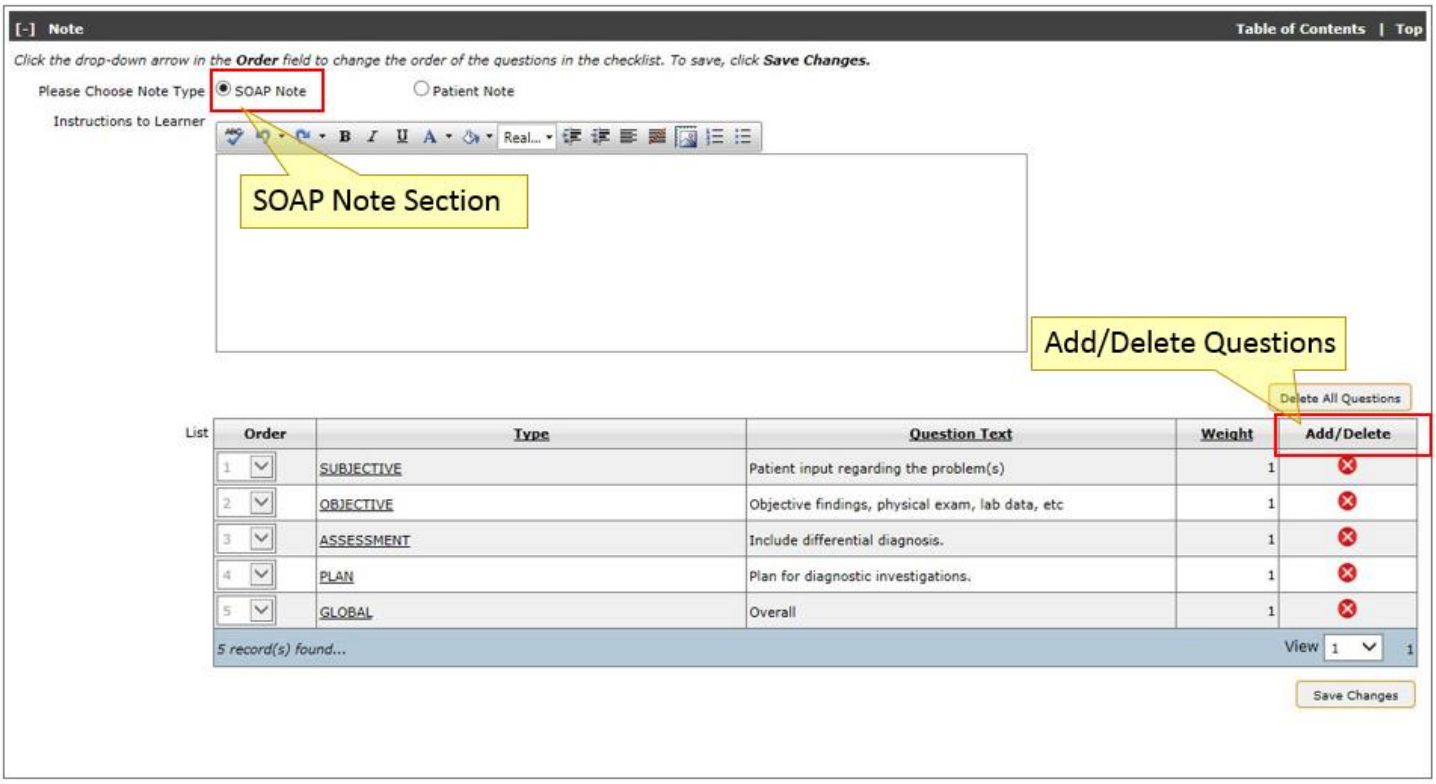
Back to Learner Post-Encounter

Note

Two types of notes can be assigned to an SP Case: a SOAP Note or Patient Note, as shown below:

Please Choose Note Type ○ SOAP Note ◉ Patient Note

SOAP Note



A SOAP Note (Subjective, Objective, Assessment, and Plan) is an industry standard format used to document subjective and objective findings, assessment, and plan of treatment of the patient's current status. It requires the student to identify diagnostic hypotheses, order labs and then justify a final diagnosis and treatment plan.

1. The SOAP section is pre-populated with 5 fields in the Question Text for Subjective, Objective, Assessment, Plan and Global type. If there is a green plus sign in the Add/Delete column, then that type needs to be added in order for the student to answer that note type. Consequently, the added type will be included in the Scoring Template in the section below.

2. **Rearrange Question Order** – When multiple questions are added to the List box, the order of the questions in the Checklist can be rearranged by clicking the drop-down arrow in the Order field and selecting the new chronological order.

Delete a SOAP Note type:

1. Click the **X** in the Delete column corresponding to the SOAP note listing to be deleted.

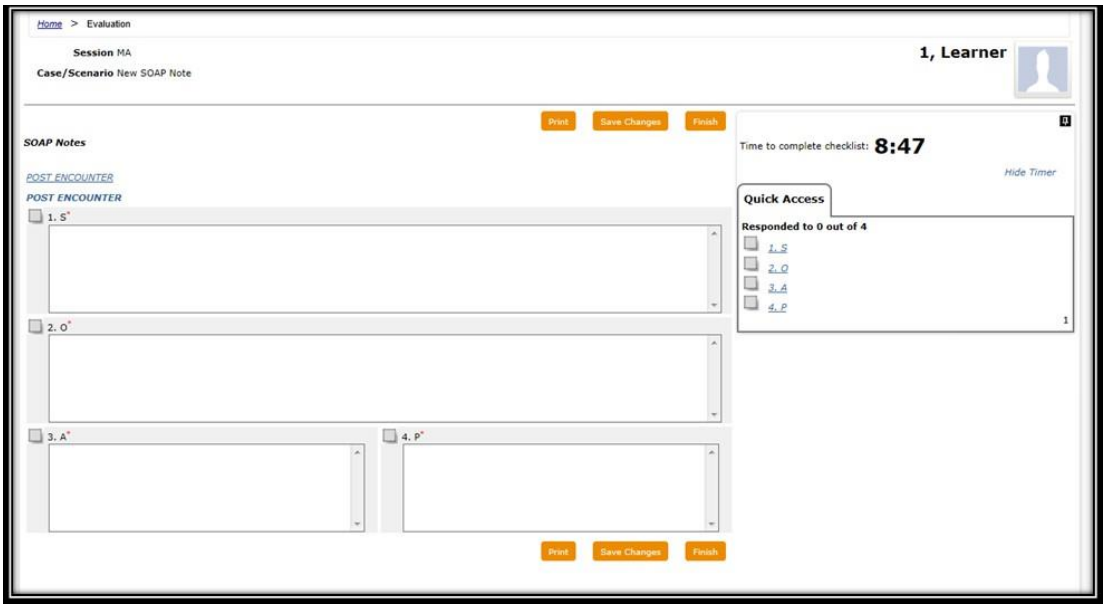
2. A warning window will pop up asking if you are sure you want to delete? Answer **OK** to proceed with deletion; Click **Cancel** not to delete.

3. Press **Delete All Questions** to remove all SOAP Note questions.

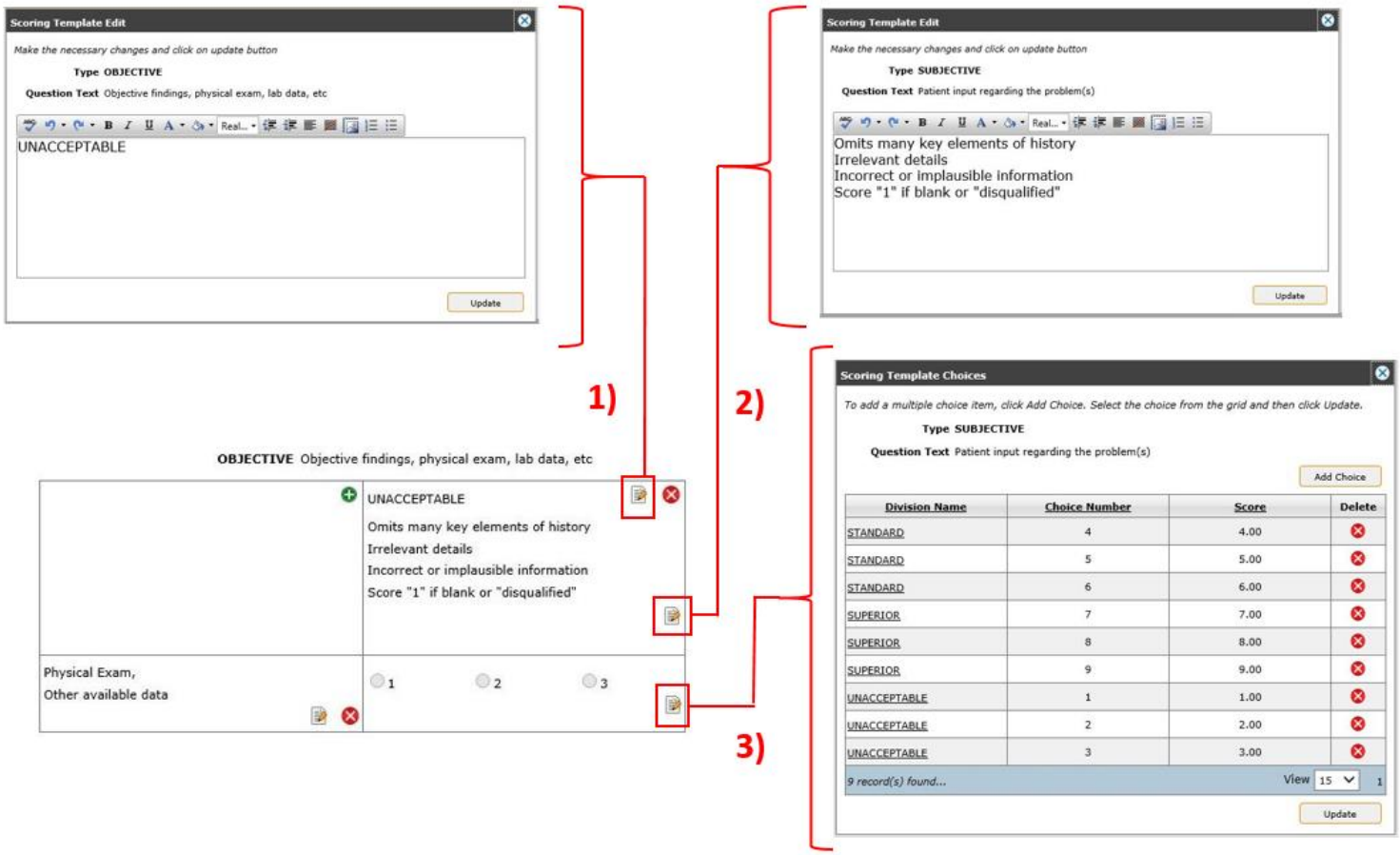
To Edit a question:

1. Click on the question name hyperlink.
2. The Question window will pop up.
3. Edit the question.
4. Enter instructions in the Instructions field if necessary. *(Optional - Use the formatting mini toolbar to stylize your type. This is not visible to the learner.)*
5. Edit the Question Weight.
6. Click **Save Changes**.

Note: The format of the SOAP Note appears as follows to the learner:



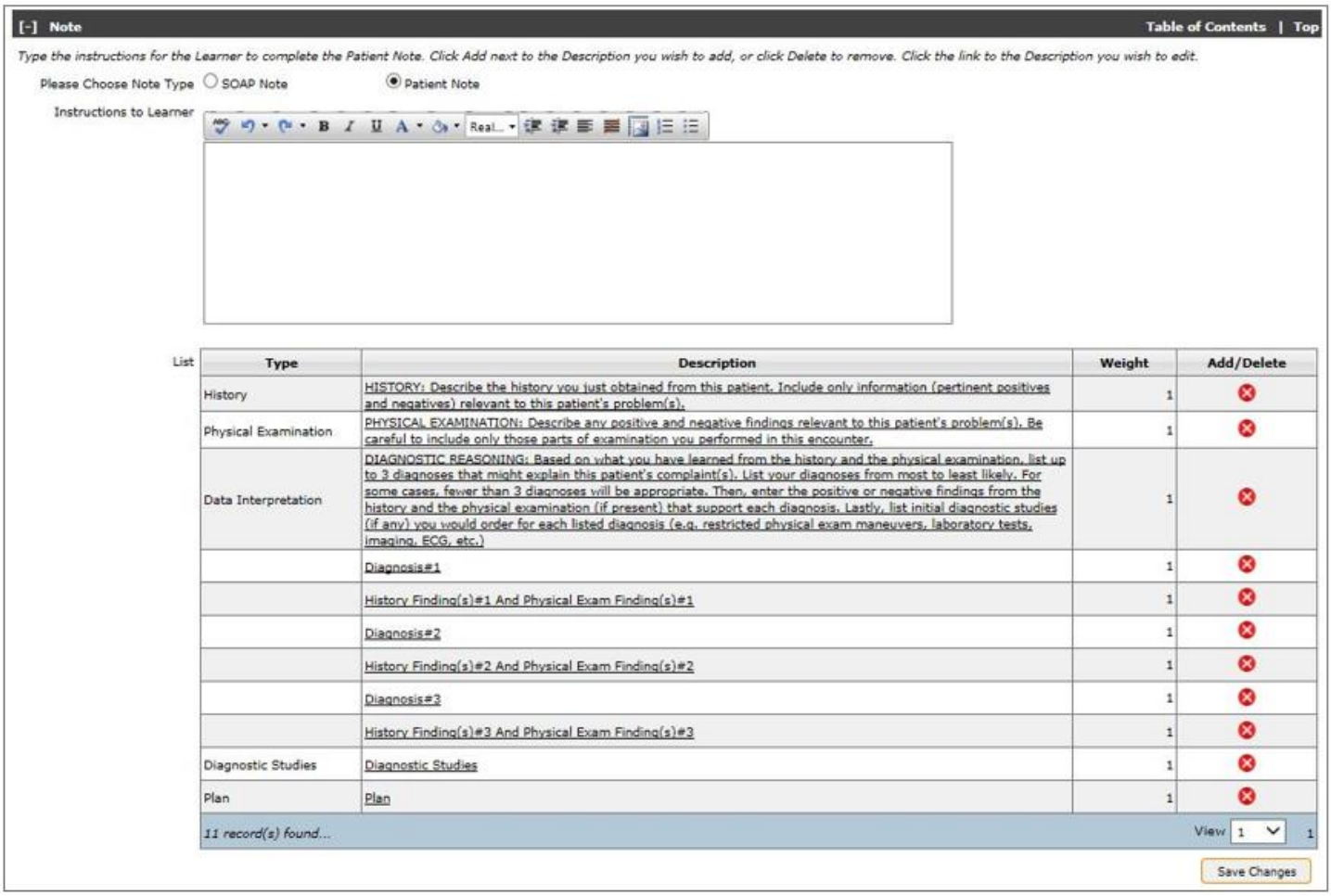
Note: All SOAP Note fields are editable, as shown:



Click the icon to edit the title of the following: 1) grading division level, 2) grading level description, or 3) numeric grade for all division levels.

Press (+) to open a section of the SOAP Note or (-) to close a section. You can also press <TAB> to access each section of the SOAP Note.

<u>Patient Note</u>



The Patient Note provides a maximum of 11 questions for the student to complete following the encounter with the SP or simulator:

1. History
2. Physical Examination
3. Data Interpretation
4. Diagnosis #1
5. History Finding(s) and Physical Exam Findings #1
6. Diagnosis #2
7. History Finding(s) and Physical Exam Findings #2
8. Diagnosis #3
9. History Finding(s) and Physical Exam Findings #3
10. Diagnostic Studies
11. Plan

Once the Patient Note is selected, all questions will be added to the note. The user can modify or delete the questions.

Back to Learner Pre-Encounter

Back to Learner Post-Encounter

Scoring Template (for SOAP Note)

Subjective

SUBJECTIVE Patient input regarding the problem(s)

	UNACCEPTABLE	STANDARD	SUPERIOR
	Omits many key elements of history Irrelevant details Incorrect or implausible information Score "1" if blank or "disqualified"	Provides enough correct detail for adequate assessment and plan May be missing some elements of HPI, PMH, Family or Social History Denotes age/gender	Accurate and complete information as with standard; identifies patient''s concern(s) Key elements listed(CC, HPI with OPQRST, etc) Reasonably concise Pertinent positives and negatives (ROS) included
Medical History CC HPI pertinent ROS Includes relevant PMH, FamHx, SocHx, etc	1 2 3	4 5 6	7 8 9

Objective

OBJECTIVE Objective findings, physical exam, lab data, etc

	UNACCEPTABLE	STANDARD	SUPERIOR
	Omits many key elements of history Irrelevant details Incorrect or implausible information Score "1" if blank or "disqualified"	Provides enough correct detail for adequate assessment and plan May be missing some elements of HPI, PMH, Family or Social History Denotes age/gender	Accurate and complete information as with standard; identifies patient''s concern(s) Key elements listed(CC, HPI with OPQRST, etc) Reasonably concise Pertinent positives and negatives (ROS) included
Physical Exam, Other available data	1 2 3	4 5 6	7 8 9

Assessment

ASSESSMENT Include differential diagnosis.

	UNACCEPTABLE	STANDARD	SUPERIOR
	Omits many key elements of history Irrelevant details Incorrect or implausible information Score "1" if blank or "disqualified"	Provides enough correct detail for adequate assessment and plan May be missing some elements of HPI, PMH, Family or Social History Denotes age/gender	Accurate and complete information as with standard; identifies patient''s concern(s) Key elements listed(CC, HPI with OPQRST, etc) Reasonably concise Pertinent positives and negatives (ROS) included
Impression Differential diagnosis Problem List or Risk Factors instead of DDX if Well Visit	1 2 3	4 5 6	7 8 9

Plan

PLAN Plan for diagnostic investigations.

	UNACCEPTABLE	STANDARD	SUPERIOR
	Omits many key elements of history Irrelevant details Incorrect or implausible information Score "1" if blank or "disqualified"	Provides enough correct detail for adequate assessment and plan May be missing some elements of HPI, PMH, Family or Social History Denotes age/gender	Accurate and complete information as with standard; identifies patient''s concern(s) Key elements listed(CC, HPI with OPQRST, etc) Reasonably concise Pertinent positives and negatives (ROS) included
Overall synthesis Organization - "tells a story" Legibility & Accuracy	1 2 3	4 5 6	7 8 9

Global

GLOBAL Overall

	UNACCEPTABLE	STANDARD	SUPERIOR
	Omits many key elements of history Irrelevant details Incorrect or implausible information Score "1" if blank or "disqualified"	Provides enough correct detail for adequate assessment and plan May be missing some elements of HPI, PMH, Family or Social History Denotes age/gender	Accurate and complete information as with standard; identifies patient''s concern(s) Key elements listed(CC, HPI with OPQRST, etc) Reasonably concise Pertinent positives and negatives (ROS) included
Overall	1 2 3	4 5 6	7 8 9

Save Changes

► System-provided Rubric the evaluator may use to evaluate the learner's SOAP note responses. As noted above, the rubric may be edited.

In order to help in scoring the SOAP questions, a template for scoring is provided. The Scoring Template is divided into as many sections as there are SOAP note questions in the above section. Each section has 4 rows. The first row specifies keywords and criteria that the evaluator is looking for in the learner's response. The next 3 rows list the requirements for scoring the response. All 4 rows are editable.

The Scoring Template can be edited in Items Library > SOAP Note Scoring Template. This makes your edited version available when you select SOAP Note for a post-encounter exercise. If you don't edit in Items Library, you would have to edit in each case when you select SOAP Note for a post-encounter exercise.

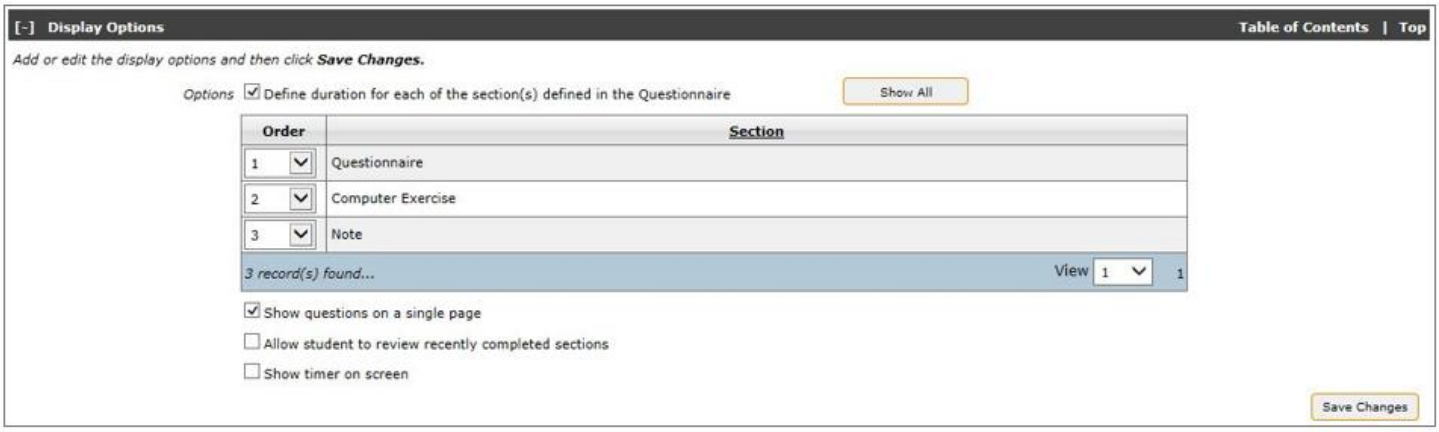
To edit the Scoring template:

1. Click the edit icon in the field that you want to edit.
2. A **Scoring Template** edit window will pop up.
3. Make the necessary changes by typing in the text field.
4. Click **Update** to save your edits.
5. To save all the edits in this section, click the **Save Changes** button.

Back to Learner Pre-Encounter

Back to Learner Post-Encounter

Display Options



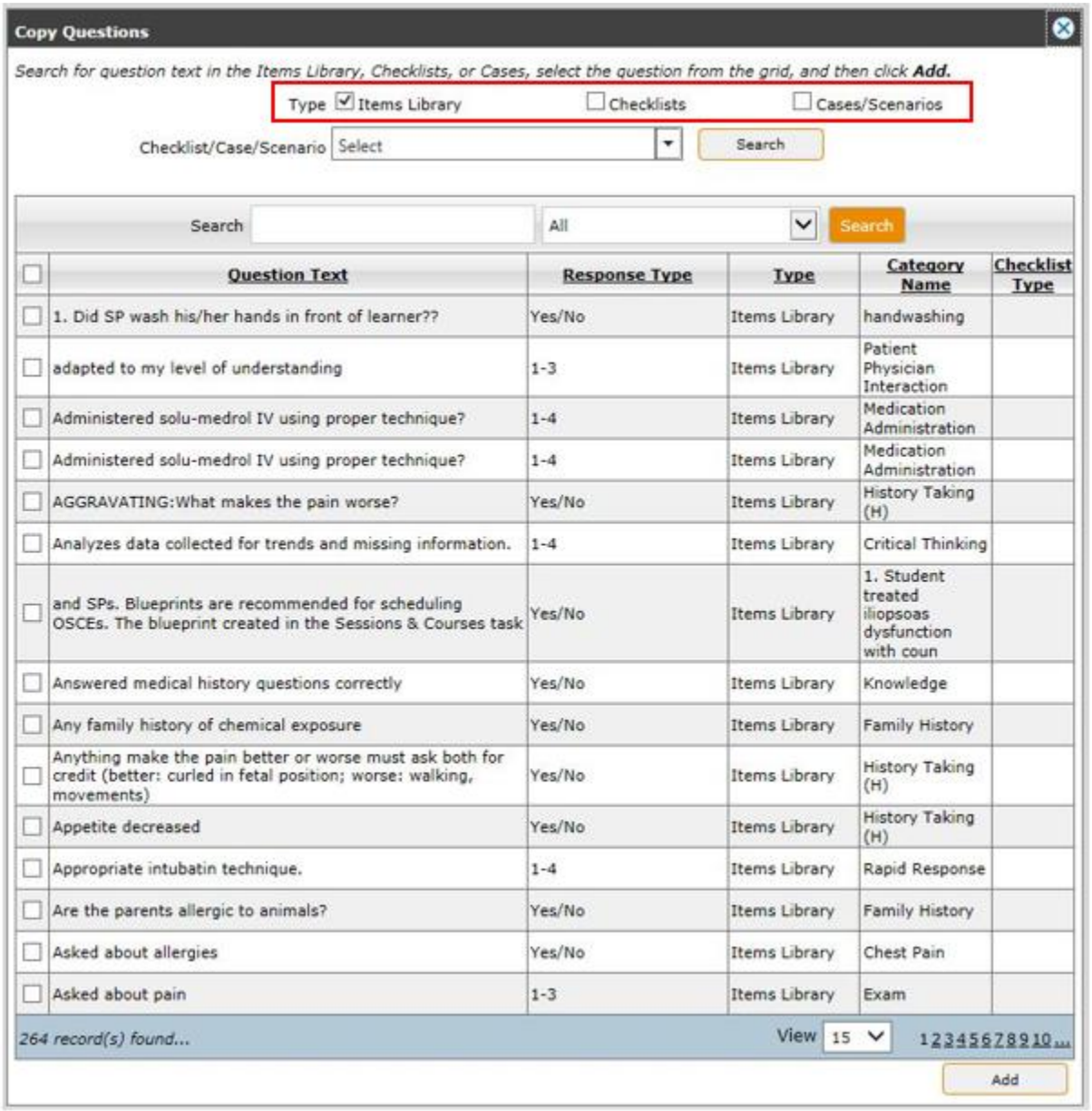
► Define the options for displaying the checklist to the learner.

1. **Define Duration** for Each of the Section(s) Defined in Questionnaire – when this box is checked, the Question order can be rearranged.
2. **Rearrange Question Order** – When multiple items (Questionnaire, Study Documents) are added to the section above, the order can be rearranged by clicking the drop-down arrow in the Order field and selecting the new chronological order.
3. **Show questions on a single page** – When this box is checked, all the questions will appear on one page. If unchecked, each question will be on its own page.
4. **Allow student to review** recently completed Post-encounter sections – This is available when Show questions on a single page is selected. This allows the learner to click on a Previous button to navigate back to a previous section of the Checklist.
5. **Show Timer on Screen** – A timer will be visible allowing the learner to see how much time is left to complete the Pre-encounter exercises. When the timer expires, that section of the test ends and the next section is presented until the completion of checklist.
6. **Save Changes**.

Back to Learner Pre-Encounter

Back to Learner Post-Encounter

Learner Post Encounter Add From Library



Add From Library pop-up window: Lists Questions already in the Items Library (Questions need to be in Active status and applicable as an Assessment question).

To add questions from Library:

1. Click the **Add From Library** button above the List box.

2. The **Add From Library** button will open a **Copy Question** pop-up window, where a directory of questions from the **Items Library, Checklist, and Cases** *(that have been designated as an SP Assessment or Learn Assessment Checklist Type in* ***Cases & Scenarios > Checklist****)* can be listed.

3. Click the **Type** checkboxes to populate the Question list from the Items Library, Checklists, and/or Cases areas.

4. Question search can be filtered by **Question Text, Response Type, Type or Category Name** *(from the Items Library, other Checklists or other Cases)*, by selecting the appropriate drop-down menu next to the **Search** field.

5. Click the **Search** button; the list will change according to the new search criteria.

6. Click on the **checkbox** next to the question you want to add.

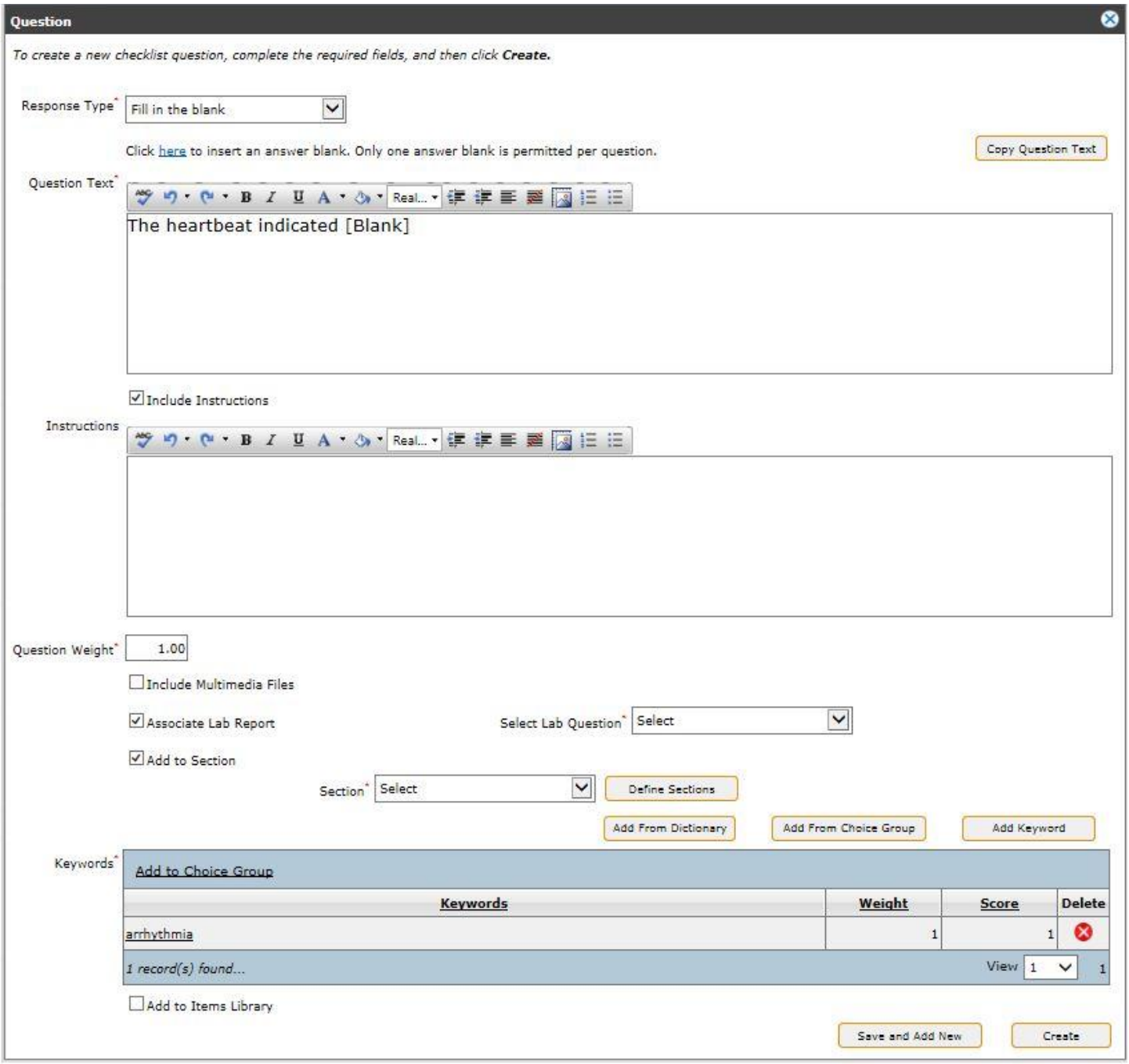
7. **Response Type** column indicates the type of answer response required for the question. This can be customized by clicking on the Question Text's hyperlink in the List box.

8. Click the **Add** button to add the question to the questionnaire.

Back to Learner Pre-Encounter

Back to Learner Post-Encounter

Post Encounter – Add Question



New questions can be created here *(this is the same as going to Items Library> Questions> New)* as well as more detailed specifications for the Post-encounter exercises. They can also be added from here into the Items Library so they can be available for use in any case or scenario.

1. Click the **Add Question** button.

Response Type – Select the type of response (*answer type*) from the drop-down menu. (i.e., *a Yes/No answer, a Likert Scale of 1-9, True/False, etc. You may use keyword scoring for free-text*

*type questions, though this is not required. Free-text style questions may be read and scored by a faculty evaluator. When selecting **Text with Keywords**, identify the keywords and misspellings in the keyword dictionary. Enable keyword scoring for the question and then associate the keywords.)*

2. **Copy Question Text** button - When this button is selected, a **Copy Question Text** box will pop up allowing you to select a question from the list; the question text will now be copied and pasted into the **Question Text** box.

3. **Question Text** – Type the question in this field *(Option - Use the formatting mini toolbar to stylize your type).*

4. **Include Instructions** – Click this checkbox if you want the instructions to be visible to the learner.

5. **Question Weight** – Enter question weight. A question needs to be weighted for the choice to be counted in the scoring process. The default value is 1.0. This is used for calculating the weighted average mean score for the category, when multiple questions within a category are used. Questions within a category can be weighted differently, and some categories can be weighted differently than other categories. The system will adjust the score according to weight given. A weight of zero means the data can be collected but it won't count in the scoring process.

6. **Add from Multimedia Library**:

   a. Click the **Add From** Multimedia button.

   b. Select from the list of multimedia files already in the Video database, or search for a particular file by file Name, title of case or scenario, file Type, or view files in a particular folder.

   c. Or, use the Search area to the right to search by Audio, Video, image or Word document or type in keywords.

   d. Click **Search**.

   e. Click the **checkbox** to left of the file name.

   f. Click the **Add** button.

   Note: Only one file can be uploaded with a 2GB maximum file size.

7. **Associate Lab Report** – Check this checkbox if you want to associate a Lab Report file to be used with Lab Questions in the checklist.

   a. To associate a Lab Report to be used to answer lab questions, in the Response Type, select **Lab Report** in the drop-down menu.

   b. Type in Lab Question in the **Question** Text field.

c. Click on the **Add Choice and Lab** button located above the Labs box.

d. A **Choice** window will pop up. Enter the Lab file name in the Choice text field.

e. Check **Score and Weight is Applicable** if you want to include a score and weight for this question.

f. In the **Lab Report File** field, click the **Browse** button to navigate to the file you want to use for the Lab Report. When the file is located, click **Open**.

g. Click the **Upload** button; the name of your file will appear.

h. Click the **Clear** button if you want to delete the file.

i. Click **Update**.

j. Back in the Question window, your uploaded Lab Report File is listed in the Labs box.

k. Repeat if uploading additional files.

8. **Response Choices** –The order of the questions can be rearranged by selecting the numbers next to the questions.
9. **Limit Choices Required for Response** – When this is checked, the **Minimum Choices Required for Response** box and the **Maximum Choices Allowed** box will become available.
10. **Minimum Choices Required for Response** – Set the minimum number of choices that can be selected.
11. **Maximum Choices Allowed** – Set the maximum number of choices allowed to be selected.
12. **Add to Section** – When this box is checked, select the Section drop-down menu to select a section. If there are no Sections available in the dropdown, click on the **Define Section** button to create a section for the test.

    Define Section Title, Description, upload a supporting file (*optional*), and Duration in minutes learner has to complete the section *(timer will be enforced if specified in Settings > Parameters).*

    Sections are a means of assigning questions into similar topic divisions seen when the learner logs in to complete the questionnaire.

13. **Add to Items Library** – Clicking this checkbox will add this question to the Items **Library > Questions** database. Specify if you also want to apply it to a Learner Post-encounter and/or Survey checklist question. By checking these options, they will be searchable under those criteria.
14. Press **Save and Add New** to add your question and create another question. Press **Create** to add a question and exit the question dialog.

15. Press **Save Changes** at the **Question** dialog to retain your information.

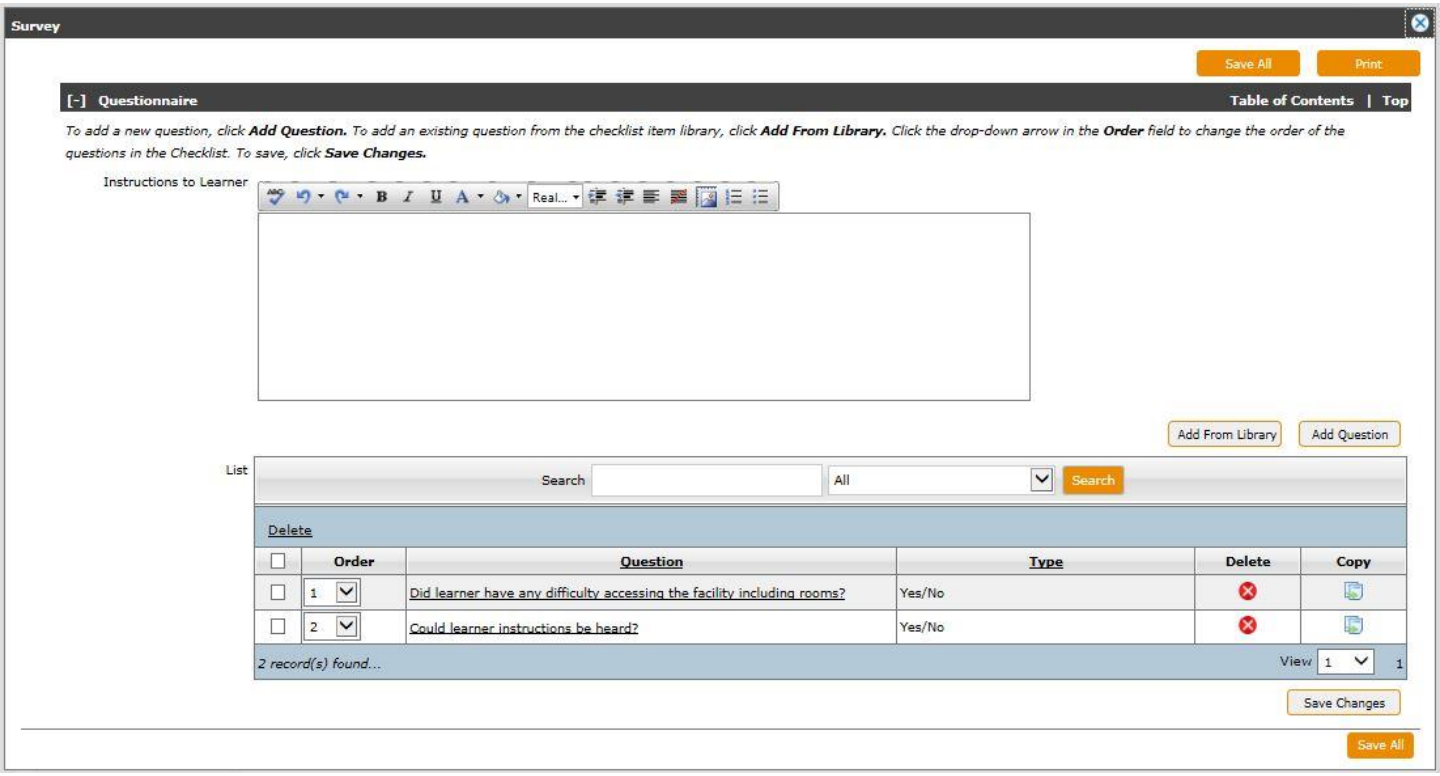
[Back to Learner Pre-Encounter](#)

[Back to Learner Post-Encounter](#)

Survey

Survey Questions – Add From Library	Add Question

Learner Pre-Encounter
Learner Post-Encounter
Learner Self-Assessment



The learner can be presented with a Survey after the Post-Encounter exercises.

► Learners may be asked to survey questions after each case that they complete during the course of a session or OSCE, or just once at the conclusion of the session.

► Survey questions may be in the form of Yes/No, Text, Choice or Multiple Choice. Survey questions are entered the same way as Post-encounter items, and survey responses can be viewed using survey analysis in Scores & Reports, Analyze Statistics.

► Dichotomous questions tend to provide the best results and the information obtained can be used to compare the student's response with the student's performance.

To add a Survey to be presented to a learner after an encounter, click the Survey hyperlink under the Learner Assessment section of the Activity Page.

Survey pop-up window:

1. **Instructions** to Learner- Type in any instructions pertaining to the learner answering the question in this text field *(Optional - Use the formatting mini toolbar to stylize your type.).*

2. **Add questions** in the List box by either clicking the **Add From Library** button or create new questions by clicking the **Add Question** button. *(See detailed instructions to add new questions and Adding questions from the Library here.)*

3. Questions can be searched by **Question Text, Response Type, Category Name or Type** by selecting the appropriate drop-down menu next to the Search field and then clicking the **Search** button.

4. **Rearrange Question Order** – When multiple questions are added to the List box, the order of the questions in the Checklist can be rearranged by clicking the drop-down arrow in the Order field and selecting the new chronological order.

5. To save, click **Save Changes**.

6. **Buttons at the top of window:**

   Save All – Saves all changes made in this window.

   Print - Information can be printed by selecting the **Print** button at the top right of window.

Delete a Listing:

1. In the Learner Post-encounter window, locate the file to be deleted.
2. Click the **X** in the Delete column to delete a listing.

To Edit a Question:

1. Click on the question name hyperlink.
2. The Question window will pop up.
3. Edit the question.
4. Click **Save Changes**.

For more detailed instructions on the Edit Question box, please refer to Add Question instructions.

Copy a Listing:

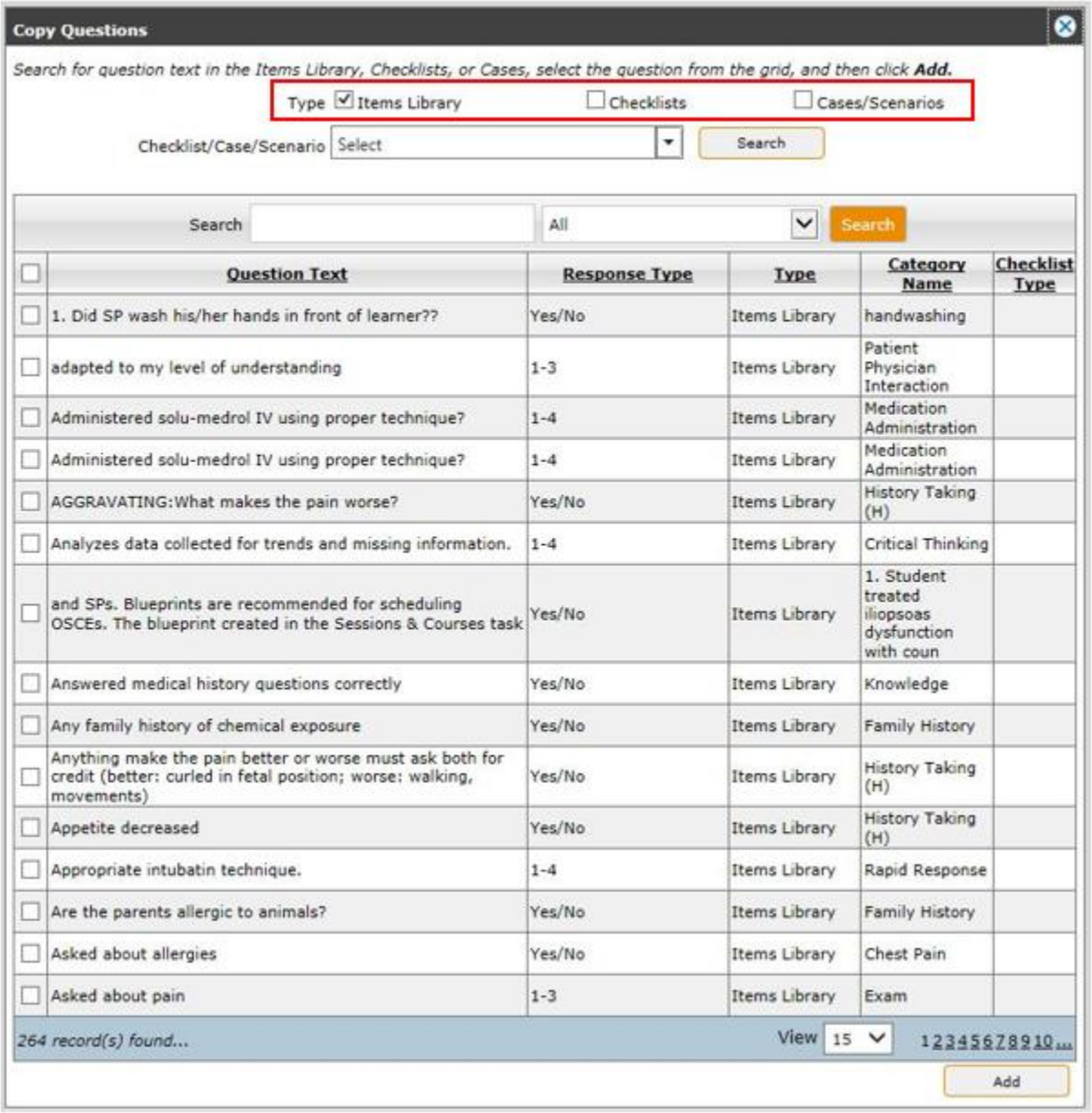
Copy – Click the **copy icon** under the Copy column to make a copy of a checklist item.

Back to Learner Pre-Encounter

Back to Learner Post-Encounter

Back to Survey

Survey Questions – Add From Library



Add From Library pop-up window: List of Questions already in the Items Library (Questions need to be in Active status and applicable as a Survey question.)

To add questions from Library:

Click the Survey link under the Learner Assessment section of the Activity Page.

1. Click the **Add From Library** button above the List box.
2. The **Add From Library** button will open a **Copy Question** pop-up window, where a directory of questions from the **Items Library, Checklist, and Cases** *(that have been designated as an SP*

Assessment or Learn Assessment Checklist Type in ***Cases & Scenarios > Checklist****)* will be listed.

3. Click the **Type** checkboxes to populate the Question list.

4. Question search can be filtered by **Question Text, Response Type or Type** *(from the Items Library, other Checklists or other Cases)*, by selecting the appropriate drop-down menu next to the **Search** field.

5. Click the **Search** button; the list will change according to the new search criteria.

6. Click on the **checkbox** next to the question you want to add.

7. **Response Type** column indicates the type of answer response required for the question. This can be customized by clicking on the Question Text's hyperlink in the List box.

8. Click the **Add** button to add the question to the questionnaire.

Back to Learner Pre-Encounter

Back to Learner Post-Encounter

Back to Survey

Survey – Add Question

New questions can be created here *(This is the same as going to the* ***Items Library > Questions > New****)* as well as more detailed specifications for the Survey. They can also be added from here into the Items Library so they can be available for use in any case or scenario.

1. Click the **Add Question** button.

2. **Response Type** – Select the type of response (*answer type*) from the drop-down menu. *(i.e., a Yes/No answer, a Likert Scale of 1-9, True/False, etc. You may use keyword scoring for free-text type questions, though this is not required. Free-text style questions may be read and scored by a faculty evaluator. When selecting Text with Keywords, identify the keywords and misspellings in the keyword dictionary. Enable keyword scoring for the question and then associate the keywords.)*

3. **Copy Question Text** button - When this button is selected, a **Copy Question Text** box will pop up allowing you to select a question from the list; the question text will now be copied and pasted into the **Question Text** box.

4. **Question Text** – Type the question in this field. *(Option - Use the formatting mini toolbar to stylize your type)*.

5. **Include Instructions for Learner** – Click this checkbox if you want the instructions to be visible to the learner.

6. **Add From Choice Group** – Add customized choice groups that are defined from **Items Library > Choice Group** task.

   Add Choice – This will add an additional Choice in the Response Choices box. Clicking on this button will open a Choice pop-up window where the additional Choice label, Score and Weight can be entered. Click on the expand box of the type of choice you want to add, and then click **Add** to return to the Question window. *(Be sure to adjust the Response Type to match the total number of choices.)*

   Add to Choice Group – Click on this hyperlink to add your choices from the step above to the **Choice Group** database (***Items Library > Choice Group***) so it will be available for future use.

   Response Choices – The order of the questions can be rearranged by selecting the numbers next to the questions.

7. **Add to Items Library** – Clicking this checkbox will add this question to the **Items Library > Questions** database. Specify if you also want to apply it to a Learner Post-encounter and/or Survey checklist question. By checking these options, they will be searchable under those criteria.

8. **Is Survey Question Optional** – Check if filling out this question is not required.

9. **Save and Add New** – Click this button if you want to save this question and add additional questions. If not, click **Create**.

10. **Buttons at the top of window**:

    Save All – Saves all changes made in this window.

    Print - Window can be printed by selecting the **Print** button at the top right of window.

Back to Learner Pre-Encounter

Back to Learner Post-Encounter

Back to Survey

Learner Self-Assessment

Questionnaire Window Overview	Add From Library	Add a Question

Learner Pre-Encounter
Learner Post-Encounter
Survey

► **Learner Self-Assessment** questions are checklist items for the learner to assess their own performance.

► Learner Self-Assessments are delivered to the learner to view their video of the case or scenario they participated in and to answer the Learner Self-assignment checklist questions. The Self-Assessment will be made available when the corresponding session video is assigned. The learner will have access to the Self-Assessment when the video file is accessed.

Questionnaire Window Overview

1. Click on the **Learner Self-Assessment** hyperlink under the Learner Assessment section of the Activity Page. The Learner Self-Assessment Questionnaire window will pop up.

2. **Instructions for Scoring** - Type in any instructions pertaining to scoring for the learner in this text field. *(Optional - Use the formatting mini toolbar to stylize your type. This is not visible to the learner.)*

3. Add questions in the List box by either clicking the **Add From Library** button or create new questions by clicking the Add Question button. *(See detailed instructions to add new questions and Adding questions from the Library here.)*

4. Questions can be searched by **Question Text, Type, Category**, or **Weight** by selecting the appropriate drop-down menu next to the **Search** field and then clicking the **Search** button.

5. **Rearrange Question Order** – When multiple questions are added to the List box, the order of the questions in the Checklist can be rearranged by clicking the drop-down arrow in the Order field and selecting the new chronological order.

6. **Select Format** – Select the radio button of the layout you choose to use for the Evaluation form the evaluator will receive on their dashboard.

7. The **Categories** field should now list the categories of the questions that were added to the Questionnaire List area.

8. To save, click **Save Changes**.

9. **Buttons at the top of window**:

Save All – Saves all changes made in this window.

Print - Window can be printed by selecting the **Print** button at the top right of window.

Delete a Listing:

1. In the **Learner Pre-encounter** window, locate the file to be deleted.
2. Click the **X** in the Delete column to delete a listing.

Edit a Question:

1. Click on the question name hyperlink.
2. The **Question** window will pop up.
3. Edit the question.
4. Click **Save Changes**.

Copy a Listing:

Click the **Copy** icon under the **Copy column** to make a copy of a checklist item *(copying is beneficial if you want to make changes to an item without changing the original).*

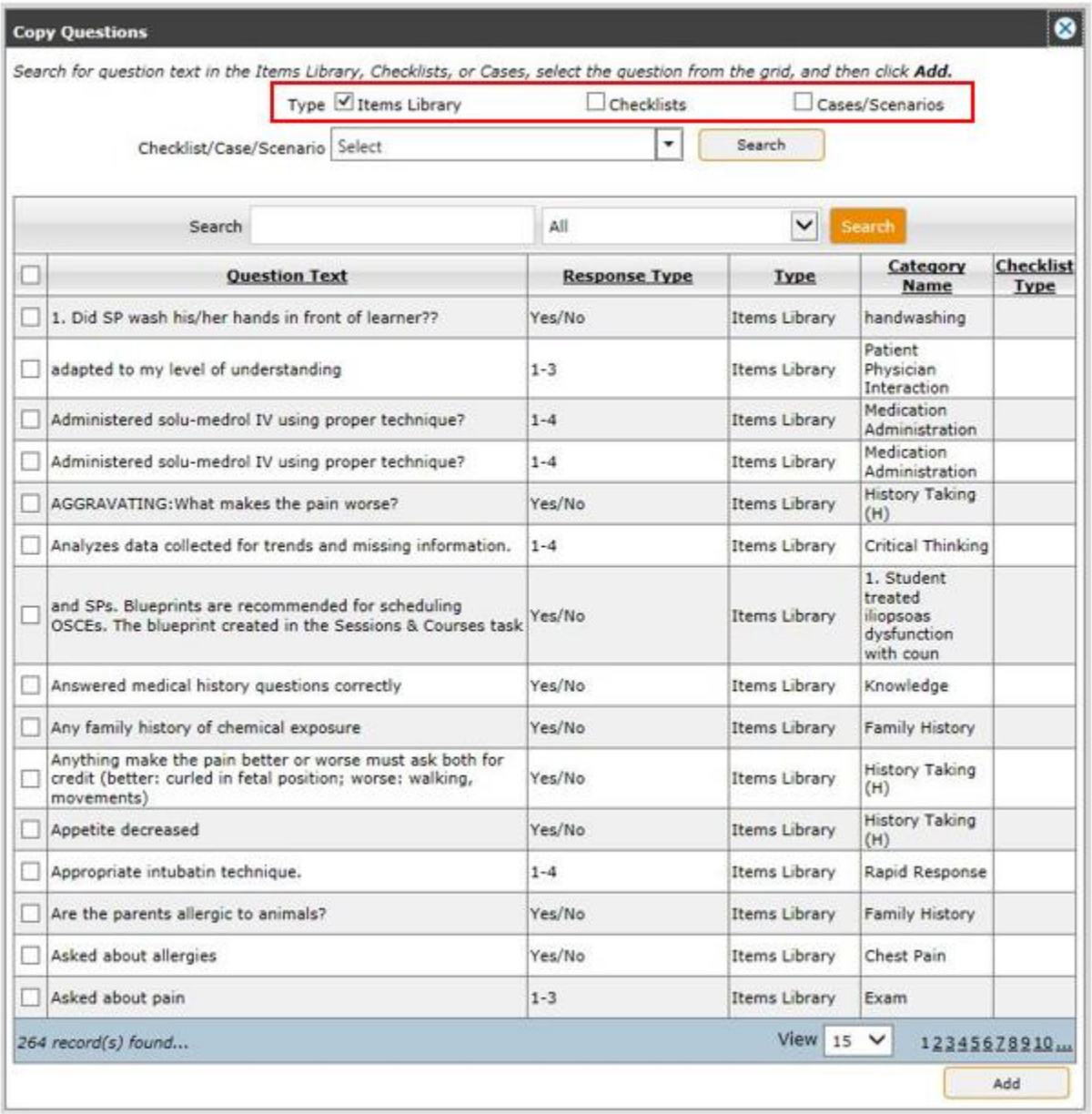
Back to Learner Pre-Encounter

Back to Learner Post-Encounter

Back to Survey

Back to Learner Self-Assessment

Add From Library



	Question Text	Response Type	Type	Category Name	Checklist Type
	1. Did SP wash his/her hands in front of learner??	Yes/No	Items Library	handwashing	
	adapted to my level of understanding	1-3	Items Library	Patient Physician Interaction	
	Administered solu-medrol IV using proper technique?	1-4	Items Library	Medication Administration	
	Administered solu-medrol IV using proper technique?	1-4	Items Library	Medication Administration	
	AGGRAVATING:What makes the pain worse?	Yes/No	Items Library	History Taking (H)	
	Analyzes data collected for trends and missing information.	1-4	Items Library	Critical Thinking	
	and SPs. Blueprints are recommended for scheduling OSCEs. The blueprint created in the Sessions & Courses task	Yes/No	Items Library	1. Student treated iliopsoas dysfunction with coun	
	Answered medical history questions correctly	Yes/No	Items Library	Knowledge	
	Any family history of chemical exposure	Yes/No	Items Library	Family History	
	Anything make the pain better or worse must ask both for credit (better: curled in fetal position; worse: walking, movements)	Yes/No	Items Library	History Taking (H)	
	Appetite decreased	Yes/No	Items Library	History Taking (H)	
	Appropriate intubatin technique.	1-4	Items Library	Rapid Response	
	Are the parents allergic to animals?	Yes/No	Items Library	Family History	
	Asked about allergies	Yes/No	Items Library	Chest Pain	
	Asked about pain	1-3	Items Library	Exam	

Add from Library Pop-up window: Lists Questions already in the Items Library (Questions need to be in Active status and applicable as an Assessment question.)

To add questions from Library:

1. Click the **Add From Library** button above the List box.

2. The **Add From Library** button will open a **Copy Question** pop-up window, where a directory of questions from the **Items Library, Checklist**, **and Cases** *(that have been designated as an SP Assessment or Learn Assessment Checklist Type in **Cases & Scenarios > Checklist**)* can be listed.

3. Click the **Type** checkboxes to populate the Question list from the Items Library, Checklists, and/or Cases areas.

4. Question search can be filtered by **Question Text, Response Type *Type, Category Name or Checklist Type*** *(from the Items Library, other Checklists or other Cases)*, by selecting the appropriate drop-down menu next to the **Search** field.

5. Click the **Search** button; the list will change according to the new search criteria.

6. Click on the **checkbox** next to the question you want to add.

7. **Response Type** column indicates the type of answer response required for the question. This can be customized by clicking on the Question Text's hyperlink in the List box.

8. Click the **Add** button to add the question to the questionnaire.

Back to Learner Pre-Encounter

Back to Learner Post-Encounter

Back to Survey

Back to Learner Self-Assessment

Add Question

New questions can be created here *(This is the same as going to the **Items Library > Questions** to create a new question)*. They can also be added from here into the Items Library so they can be available for use in any case or scenario.

1. Click the **Add Question** button.

2. A **Question** window will pop up where you can specify the Category, Question, Grading Information, and Question Response Type.

3. **Add to Category** – Select a Category that is already in the **Items Library > Categories** database by selecting the drop-down menu and selecting one of the categories listed. When the Category is selected the accompanying **Response Type** *(type of answers required)* will be listed. The response type can be changed within the category by using the **Customize** button. **Use Default Scoring** brings customized scoring to match the rest of the category.

4. **Add New Category** – Click **Add New Category** button to define a new Category.

5. The Add New Category pop-up window:

   Response Type – Select the type of response (*answer type*) from the drop-down menu. (i.e., *a Yes/No answer, a Likert scale of 1-9, True/False, etc. You may use keyword scoring for free-text type questions, though this is not required. Free-text style questions may be read and scored by a faculty evaluator. When selecting Text with Keywords, identify the keywords and misspellings in the keyword dictionary. Enable keyword scoring for the question and then associate the keywords.)*

   Name – Type a name of the Category *(based on the subject matter of the questions that will be contained in the category, i.e., Communication Skills, Physical Exam, etc.).*

   Weight – Enter the weight of this category. A question needs to be weighted for the choice to be counted in the scoring process. The default value is 1. This is used for calculating the weighted average mean score for the category, when multiple questions within a category are used. Questions within a category can be weighted differently, and some categories can be weighted differently than other categories. The system will adjust score according to weight given. A weight of zero means the data can be collected but it won't count in the scoring process.

   Required Pass % - *(Optional)* The minimum overall score that is needed for a student to pass the case. A zero in this box denoted that there are no minimum pass requirements for the case.

   Status – Select the status of the question. Active means it is actively in the system and can be used in future cases and scenarios. Retired means inactive and ineligible for future use until made active again; this is a better alternative to deleting it, which would remove it permanently.

   Response Choices – Click on the hyperlink under the Choice column and define the answer choice that pertains to the Response Type that was selected, (i.e., Low/Moderate/Severe; or Poor/Good/Excellent, etc.) by labeling the choice in the **Choice** text field (a maximum of 255 characters can be entered).

   Score – Indicate the amount of credit received by selecting this choice.

   Click **Save** to return to the Add Category window.

When the fields are complete, click the **Create** button.

A message window will pop up asking if you want to create additional categories; click **Yes** to add another question or click **No** to return to the Question window.

Back to Question window

6. If a new category was added in the previous step, it will be available in the drop-down menu. Select the **Category** for your question.
7. **Copy Question Text** button - When this button is selected, a **Copy Question Text** box will pop up allowing you to select a question from the list; the question text will now be copied and pasted into the **Question Text** box.
8. **Question Text** – Type the question in this field. *(Option - Use the formatting mini toolbar to stylize your type).*
9. **Include Instructions** – Click this checkbox if you want the instructions to be visible to the learner.
10. **Question Weight** – Enter question weight. A question needs to be weighted for the choice to be counted in the scoring process. The default value is 1.0. This is used for calculating the weighted average mean score for the category, when multiple questions within a category are used. Questions within a category can be weighted differently, and some categories can be weighted differently than other categories. The system will adjust score according to weight given. A weight of zero means the data can be collected but it won't count in the scoring process.
11. **Must Pass** – Check this box if the correct response to this question is mandatory for the learner to pass the entire exercise. Checking this box will populate the Question **Weight** and **Minimum Required** percentage to pass fields. These are mandatory in order to specify the conditions to pass.
12. **Customize** – Clicking on this button will enable customization of the Response Choices and populate a **Reset to Default** button, an **Add From Choice Group** button and an **Add Choice** button:

    Reset to Default – Deletes the customization of the response choice and resets to default.

    Add From Choice Group – Allows you to add customized choice groups that are defined in the **Items Library > Choice Group** task. The list can be expanded by clicking on the + sign to reveal the choice details. Make selection by checking checkboxes and clicking the **Add** button. *(Be sure to adjust the Response Type to match the total number of choices.)*

    Add Choice – This will add an additional Choice in the Response Choices box. Clicking on this button will open a Choice pop-up window. If the checkbox for **Score and Weight is Applicable** is checked, Score and Weight needs to be indicated. Click the **Update** button.

    Add to Choice Group – Click on this hyperlink to add your choices from the step above to the **Choice Group** database (***Items Library > Choice Group***) so it will be available for future use.

13. **Response Choices** –The order of the questions can be rearranged by selecting the numbers next to the questions.

14. Limit Choices Required for Response – When this is checked, the **Minimum Choices Required for Response** box and the **Maximum Choices Allowed** box will become available.

    Minimum Choices Required for Response - Set the minimum number of choices that can be selected.

    Maximum Choices Allowed – Set the maximum number of choices allowed to be selected.

15. **Score** – Determine the amount of points to be credited for the correct response.

16. Based on the weight of each response choice, the Minimum score and the Maximum score are indicated. These can be changed by clicking on the **Choice** hyperlink and changing the score for each response or by checking **Include Advanced Scoring Options**.

    a. Click the **Add Scoring Options** button to specify customize scoring for each choice to customize the Score, Weight and Criteria.

    b. When **Score and Weight is Applicable** is checked, enter the **Score** amount, **Weight** and **Criteria** for this choice by checking the choice checkbox, inputting the Score, Weight and Criteria.

    c. **Score** – Determine the amount of points credited for the correct answer. Check the correct choice and indicate that in the Score box. There may be multiple choices that are correct; if so, check those checkboxes and add the Score in the Score box. Add the weight in the **Weight** box and then add the **Criteria**.

    d. **Criteria** – *(Number of correct choices to receive the score)* Specify the criteria for learner to pass this question; click the checkbox next to the choice(s) designated as the correct answer(s). Indicate the number of choices that are checked in the Criteria box.

       For example: If there are 3 choices and 2 are correct or are eligible to receive the amount of credit indicated by the Score, check those 2 choices, add the weight and the score for those choices and in the Criteria box, indicate 2.

    e. Click the **Add** button.

    f. Repeat for each choice by clicking on the **Add Scoring Options** button in the Response Choices box.

    g. Indicate the incorrect choice by selecting that choice's checkbox and adding 0 in the criteria box. Also put 0 in the Score box with a Weight of 1. A negative number can be indicated if points will be deducted for the incorrect choice.

    h. **Weight** must be at least 1 so the data is collected; the Weight is not the score.

    i. Click the **Save Changes** button.

17. **Add to Items Library** – Click this box to add a question to the Items Library database. This will enable the question to be available for any SP case or scenario. Clicking on this checkbox will populate:

Applicable Checklists – SP Performance or Learner Self-Assessment: select either or both of these if the question can also be applied to these checklists.

18. **Save and Add New** – Click this button if you want to save this question and add additional questions. If not, click **Create**.

To Delete a Question:

Click the red **X** icon in the **Delete** column of the question to be deleted, or to delete the entire checklist, uncheck it in the Evaluation Summary section.

To Edit a Question:

12. Click on the question name hyperlink.
13. The Question window will pop up.
14. Edit the question
15. Click **Save Changes**.

To Copy a Question:

Copy – Click the **copy icon** under the Copy column to make a copy of a question.

Back to Learner Pre-Encounter

Back to Learner Post-Encounter

Back to Survey

Back to Learner Self-Assessment

Scenarios

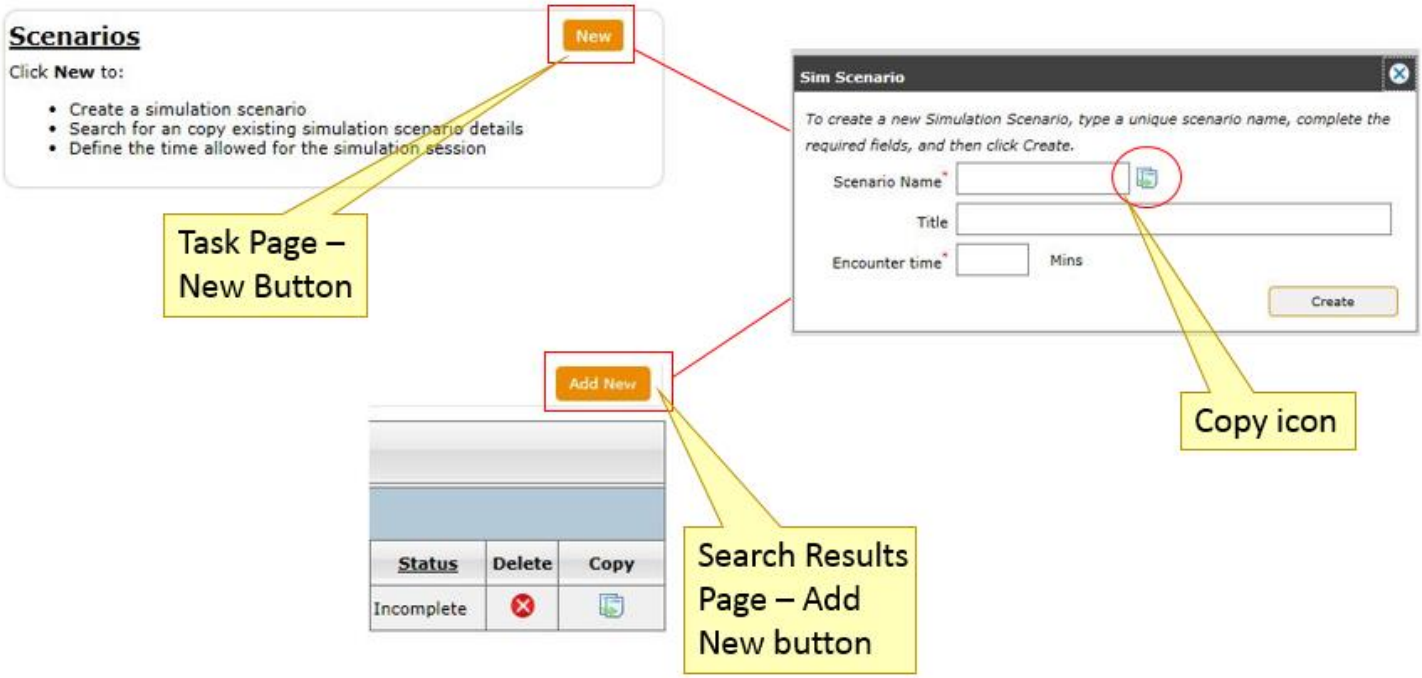
Scenarios Preparation Checklist

Verify this information before creating a new Scenario:

☐	**Users**	Students entered into database. (Settings > User List > Student)
☐	**Item Category for Checklist Items**	A Category is used to group Checklist Items. The system has generated a Post-encounter, a Pre-encounter and Survey Category; these cannot be deleted and should not be altered. Add additional Item Category(s) and response type. The response type defines the type of responses (such as Yes/No, text, or a Likert scale) and the scoring criteria. The scoring criteria will be applied each time a new checklist item is added to the category. The scoring details may be customized.
☐	**Checklist Items (Questions)**	Checklist items are entered and stored in the Item Categories. Enter questions to be listed by designated Categories (Pre-Scenario, Evaluator, Team, Post-encounter, Survey and Self-Evaluation). Items may be entered directly into the library once and then associated with any case.
☐	**Name of Scenario**	Enter appropriate name for scenario.
☐	**Duration**	Enter the duration of the scenario, pre-encounter and post-encounter time.
☐	**Classification**	Acts as a filter for searches. (optional)
☐	**Objective**	(optional)
☐	**Scripts**	Scripts for trainees and specialists (required if using evaluation checklist).
☐	**Specialists Roles**	Decide if specialists are needed and in what roles (required if using an evaluation checklist).
☐	**Trainee Roles**	Decide which roles Learners will be assigned to in the scenario.
☐	**Accreditation**	If case or scenario is applicable to an accreditation, then indicate. When you associate an accreditation with a simulation session, each student enrolled in that session is credited with the amount of time equal to the length of the session. The Accreditation Utilization Report enables you to view the amount of time accredited per student per named accreditation.
☐	**Bookmarks**	Plan what actions are to be bookmarked in the video. Add to Video Task module.
☐	**Inventory**	Verify that capital equipment, supplies, and drugs are listed.

☐	**Debriefing Plan**	Plan debriefing session (How much time? Which room?).
☐	**Pre-Sim Study / Post Scenario**	Educational material and/or tests for learner to complete prior to and after scenario.
☐	**Faculty Evaluators identified**	Faculty entered into database (Settings > User List > Faculty).
☐	**Rooms**	Confirm rooms are listed correctly.
☐	**Room assignment**	Check room availability for assignment, assign equipment to room.
☐	**Schedule**	When will it take place? Check the Calendar.

Creating a New Scenario



To create a new scenario in either of the two ways shown above:

1) Click the **New** button to the right of the Scenario Task module, located on the **Cases & Scenarios** Landing page.
2) Click the **Add New** button on the Search Results page.

New Sim Scenario Pop-up Window

Clicking on the New button or Add New button will open the Sim Scenario pop-up window

In the Sim Scenario pop-up window:

1. Enter new **Scenario Name** (mandatory field).
2. Enter **Title** (optional) – title of scenario, could be same as scenario name. Title can be visible or invisible to learner by configuring **Settings>Parameters> Scheduling**. A maximum of 50 characters are allowed.
3. Enter **Encounter Time** (mandatory field). This is the amount of time of the simulated portrayal.
4. Click the **Create** Button.

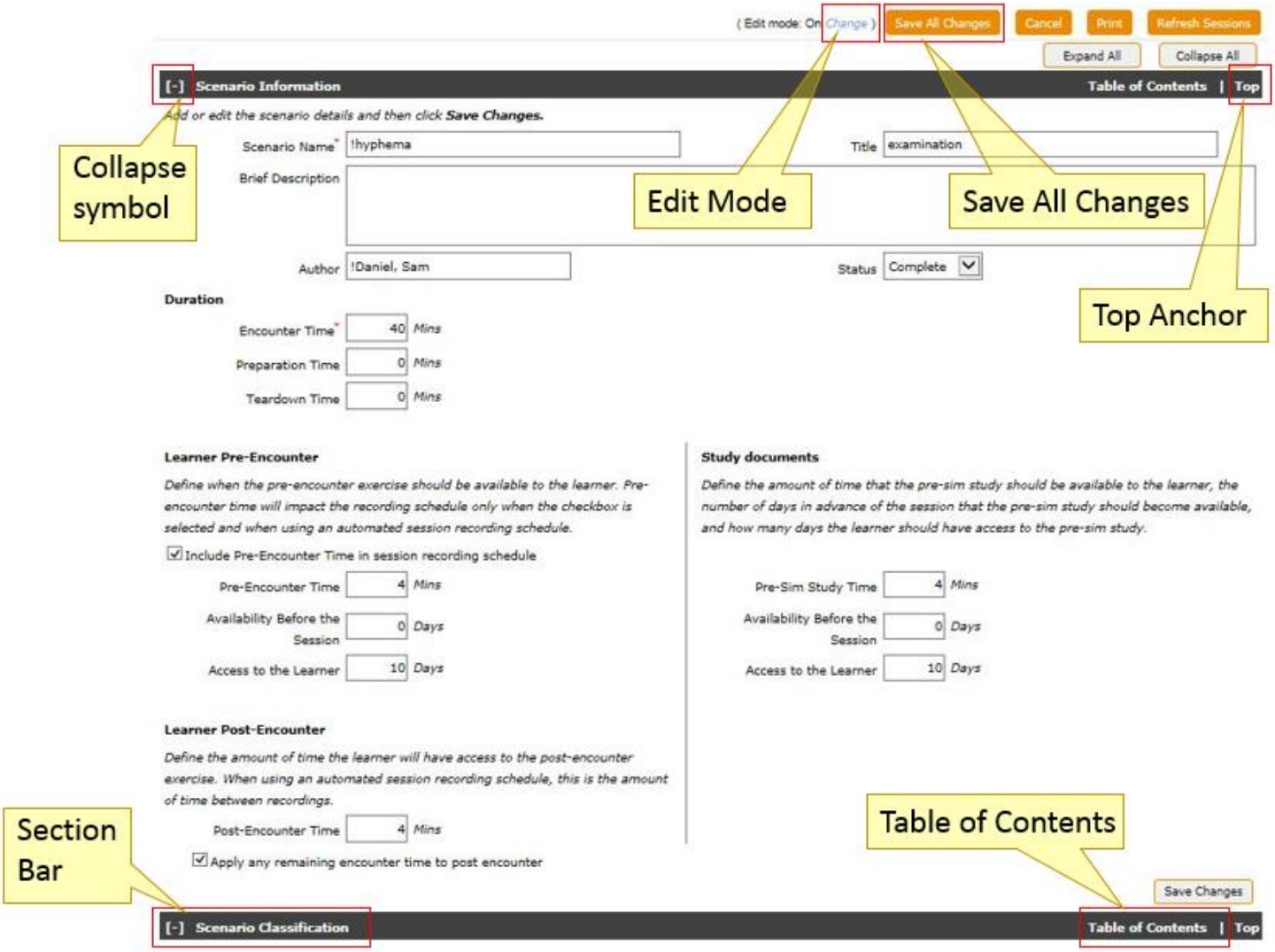
Copy a Scenario

► Copying a scenario is a quick way to create a new scenario utilizing the same information, roles, and checklist items as the original. All information can then be customized for your new scenario if needed.

To copy an existing scenario:

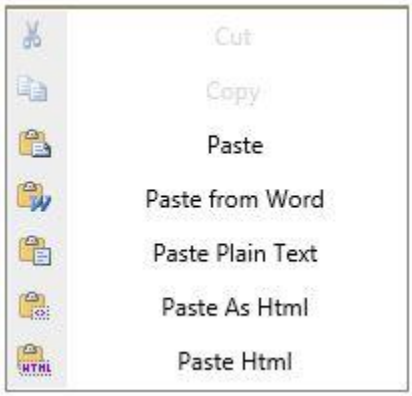
1. Click the **Copy** icon to create a new scenario based on an existing scenario.
2. A pop-up window will appear allowing you to edit the name, title, and encounter time.
3. Click the **Copy** Button.

Scenario Activity Page



- Use the Cases & Scenarios' Activity Page to enter scenario details.
- The Activity Page is broken down into sections. Navigate to each section to specify your scenario.
- Each section has a [-] symbol to the left of the section title to collapse that section.
- Each section has a Table of Contents on the blue section bar for easy navigation through the page.
- Clicking on the Top anchor on the section bar will quickly bring you to the top of the page.
- To edit the input fields, turn the Edit mode to On by clicking on the **Edit Change** hyperlink on the top right of page.
- Each section has a **Save Changes** button to save edits in that particular section. Click **Save All Changes** at the top of the page to save all changes to all sections at once.

Right-click on your mouse at this page to call up the following selections (as shown):



- **Cut** – Select existing text and cut from activity page.
- **Copy** – Select existing text and copy from activity page.
- **Paste** – Paste new text onto the activity page.
- **Paste from Word** - Paste new text onto the activity page from MS Word to retain Word formatting.
- **Paste Plain Text** – Paste unformatted text as plain text (from MS Notepad or a similar application).
- **Paste as HTML** – Paste text regardless of existing formatting onto page in HTML format.
- **Paste HTML** – Paste existing HTML text onto activity page.

These selections are available at the following dialog boxes:

Scenario Objectives

- Primary
- Secondary

Scripts

- Simulation Team
- Scene Setting

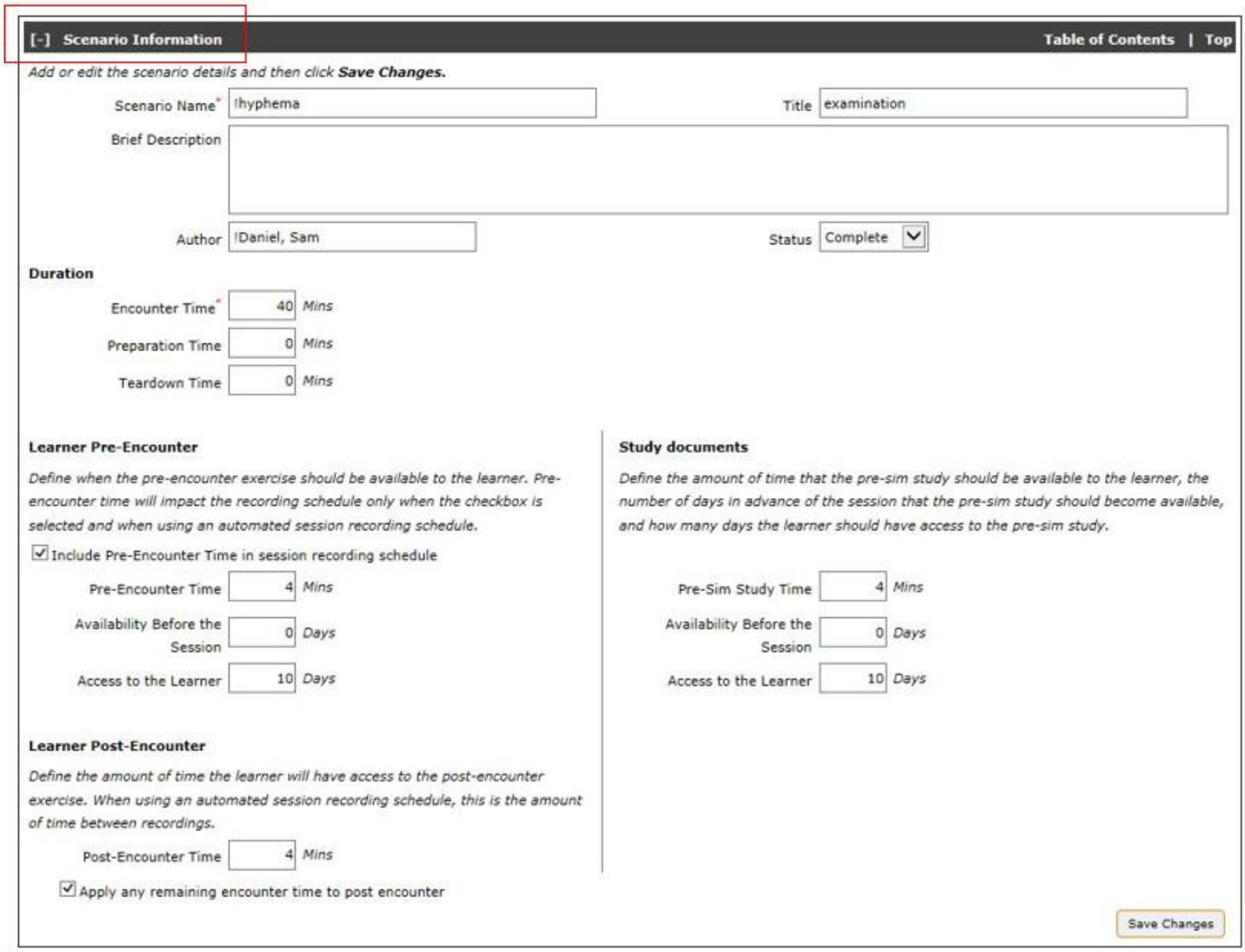
Equipment

- Rooms
  - Additional Information
- Capital Equipment
  - Additional Information
- Supplies
  - Additional Information
- Drugs
  - Additional Information

Events

- Simulation Paths
  - Management
  - Complications
  - Distractions
  - Branch Point

Scenario Information



The **Scenario Information** section is where the name, title, description, status, and time is specified for the encounter as well as Pre-encounter and Post-encounter activities.

Scenario Name *(mandatory field)*

1. Click on the **Scenario Name** text field and type name of the scenario. For example, some facilities may use a generic name for the scenario, such as “Shortness of Breath” or the patient’s name.
2. Click **Save Changes** button.

If running multiple sessions with this scenario, keep same name; this way, the name will be in the drop-down menu and can easily be compared with other sessions when generating reports.

Title *(optional)*

1. Click on **Title** text field and type title of scenario. The title can be hidden (*by a parameter setting*) from the learner so that more specific information about the scenario may be reflected in the title. This way, the hidden title does not give away too much information, or perhaps even the diagnosis, to the learner.
2. Click the **Save Changes** button.
3. To make title visible or invisible to the learner, go to **Settings > System Configuration > Parameters > Scheduling,** select **Show Case Name in Dashboard's To-Do-List**, and set to **Case Title** to have it visible or **Case Name** to have it invisible.

Brief Description

1. Click on Brief Description text field and type a description of the case or scenario.
2. Click the **Save Changes** button.

Author

1. The author is the name of the person who is currently logged in, or the person responsible for checking the scenario. This can be changed by highlighting the text inside the **Author** text field and typing in a new author name.
2. Click the **Save Changes** button.

Status (**Status of scenario creation**)

1. Click on the drop-down arrow next to Status and make your selection:

   Complete – Case needs to be marked complete in order for scenario to be available for scheduling and to be added to a Case Collection. **Incomplete** – All new cases are incomplete until marked as complete.

Retired *(inactive, not in use)* – An alternative to deleting it.

2. Click the **Save Changes** button.

Duration (Click on the Time field and enter in minutes the time needed for):

a. **Encounter Time** *(Mandatory field for scheduling purposes)* Actual time encounter is going to be recorded between a learner and an SP or simulator. Must be entered for scenario to be marked complete and ready for scheduling.

b. **Preparation Time** *(mins.)* – Amount of time needed to set up room for encounter. This is not part of the recorded time.

c. **Teardown Time** *(mins.)* – Amount of time needed to reset room to pre-encounter state. This is not part of the recorded time.

Click the **Save Changes** button.

Learner Pre-encounter

► Defines the amount of time pre-encounter questionnaire and support documents should be available to learner to complete prior to the simulation event, the number of days in advance of the session that the pre-encounter should become available, and how many days the learner should have access to the pre-encounter. Pre-encounter documents are attached to the scenario in the Learner Assessment section of the Activity Page.

Include Pre-encounter time in session recording schedule:

Define when the Pre-Sim study and pre-encounter exercise should be available to the learner. Pre-Sim study time will not impact the recording schedule. Pre-encounter time will impact the recording schedule only when the checkbox is selected and when using an automated session recording schedule.

1. If checked, pre-encounter time will be included in the session schedule.

   (*This does not mean it is included in the time of recording, only that the time will be included on the schedule when using an automated session recording schedule.)*

2. When checked, the Pre-encounter time field is available to indicate how many minutes to allow on the schedule for learner pre-encounter time.

Availability before the session *(days)*

1. Indicate how many days you want to have the pre-encounter material available to the learner before the session.
2. If making pre-encounter material available the day of the scenario, count it as a day.
3. If pre-encounter material is not available to the learner the day of the scenario, do not count that day in the available days.
4. Learner Pre-encounter questionnaire and support documents are added to the Learner Assessment section of the Activity Page.

Access to the learner

Indicate the number of days the learner will have access to the Pre-encounter material.

Example:

Availability before the session: 3 Days
Access to Learner: 1 Day

If the session is scheduled for Friday, and the Pre-encounter material is "Available 3 days before the session", with "Access of 1 day", it will be made available on Tuesday (3 days prior to the Friday session) and accessible to the learner for 1 day. The material would **only be accessible** on **Tuesday**.

Using this example, if you want the learner to be able to access the Pre-encounter material 3 Days prior to the session, and for Tues., Wed., and Thurs., then **Availability** before will be 3 days and access will be for 3 days. (Only the days prior to the session).

Or, if the Pre-encounter questions and/or Support Files are Available ***1 day before*** the session, and only available for that day, and ***not on the day of*** the session, then the Availability before the session : 1 Day and the Access to the Learner: 1 Days.

Study documents

► Defines the amount of time that the Pre-Sim study should be available to the learner, the number of days in advance of the session that the Pre-Sim study should become available, and how many days the learner should have access to the Pre-Sim study. Study documents are attached to the scenario in the Learner Assessment section of the Activity Page.

Pre-Sim Study Time

Indicate how much time learner has to review Pre-Sim study documents. Use this if providing Pre-Sim study material before session. The study documents are attached in the Learner Assessment section at the bottom of the page (this is a non-graded exercise).

Availability Before the Session

Indicate in the text field how many days before the session Pre-Sim study material should be available to the learner.

If making study documents available the day of the scenario, count it as a day and add that day to the toal number of available days.

For example:

For a Friday session:

Availability Before The Session	*3 days* (Tuesday, Wednesday and Thursday prior to the session)
Access to the Learner	*4 days* (Tuesday, Wednesday, Thursday **and Friday**, the day of the session)

If study documents are not being available to the learner the day of the scenario, do not count that day as an available day.

Enter the number of days before the session that the study documents will be made available to the learner.

Access to the learner *(days)*

1. How many days the learner should have access to the Pre-Sim study.
2. Study documents are added to the Learner Assessment section of the Activity Page.

Example: If the session is scheduled for Friday, and the Pre-Sim Study documents are available 3 days before the session, they will be made available on Tuesday (3 days prior to the Friday session). If the Pre-Sim Study documents are accessible to the learner for 1 day, then the documents would only be accessible on Tuesday. Or, if the Pre-Sim Study documents are accessible for 3 days, then they will be accessible to the learner on Tuesday, Wednesday and Thursday. Using the same example, if you wanted the Pre-Sim Study documents' availability to include the session day, and accessible from that Tuesday, then they would be available for 4 days and accessible for 4 days.

Learner Post-encounter

► Defines in minutes the amount of time the post-encounter exercise should be available to the learner. Post-encounter questions are attached to the scenario in the Learner Assessment section of the Activity Page *(this is a graded exercise).*

This field will affect **how long** the learner has to complete the Post-Encounter assessment, if using a timer. Timer use can be indicated in the Post-Encounter questionnaire window; a Yes/No parameter enforcing the timer needs to be enabled (**Settings > Parameters > Evaluations** > When set to **Yes**, the evaluation may have timer enabled and enforced). This is the countdown time that will be displayed during the exercise.

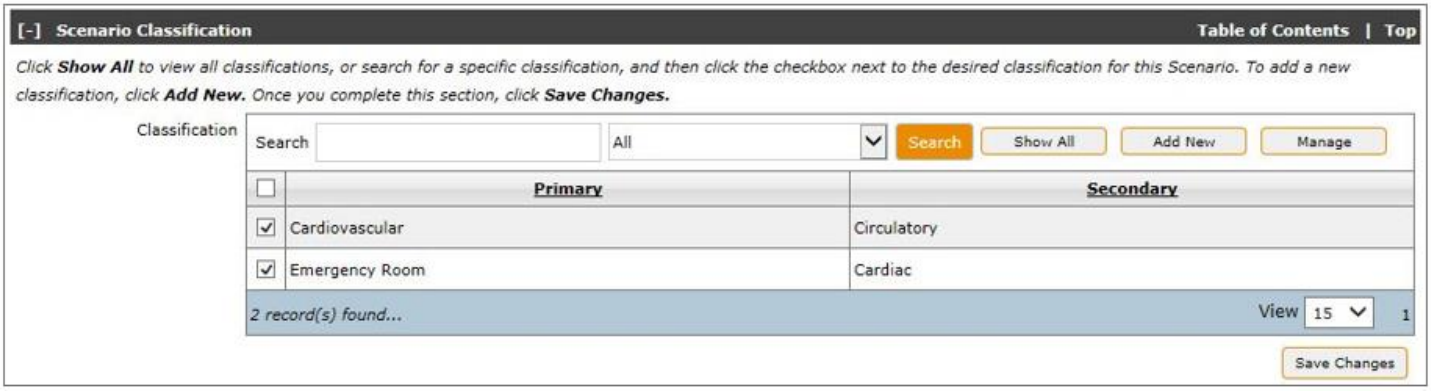
Post-encounter time *(mins.)*

1. The amount of time the SP and learner have to complete Post-encounter questionnaires, surveys, or assessments.
2. The Learner Post-encounter questionnaire is specified in the Learner Assessment section of the page.

Apply Any Remaining Encounter Time to Post-Encounter – By clicking this checkbox, this applies any time the learner saves by completing the session early to the learner's post-encounter time.

Click the **Save Changes** button.

Classification



A **Classification** is a category or division that you define solely for filtering searches. A scenario can be classified by course, organization, learning level, subject matter, or program (for example, nursing, internal medicine, geriatrics, etc.).

► The classification acts as a filter for search purposes and can also be used by Organization Unit to generate Utilization Reports.

► Classification types are: Acuity, Age, Gender, Primary and Secondary.

Application Workflow

To find a Classification already in the database:

1. Click **Show All** Classifications to view all classifications, and then click the checkbox next to the desired classification for the Scenario.

2. Click the **Save Changes** button.

3. **Search** – Type in the text field a classification if known.

   All – Click Show All Classifications to view all classifications.

   Primary – Search cases or scenarios that have a primary classification.

   Secondary – Search cases or scenarios that have a secondary classification.

   Then click **Search**.

4. Narrow down your search by utilizing the drop-down men and select either Primary or Secondary or any other classification that has been added to your Organization Unit's database. Then click **Search.**

To add a new classification:

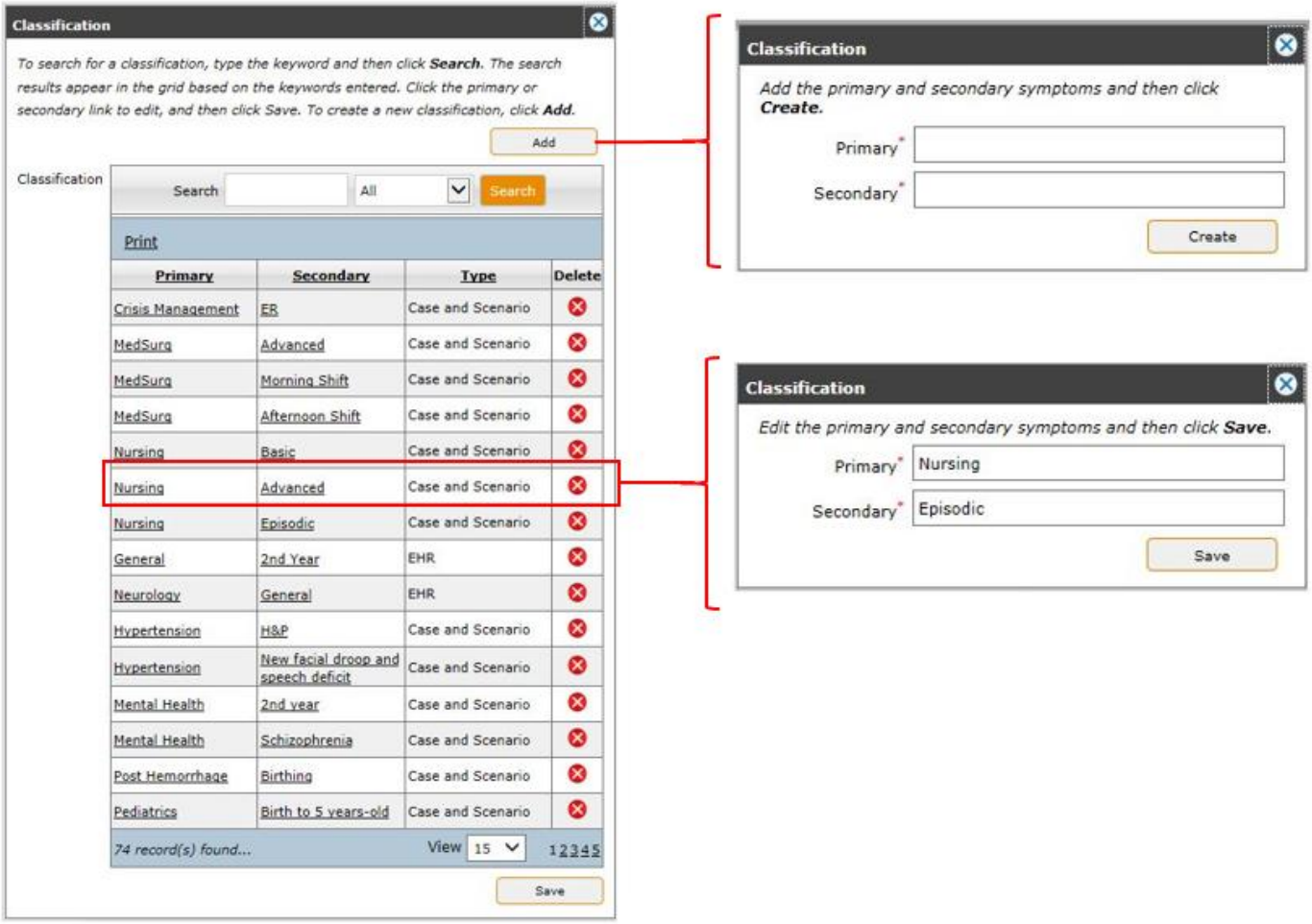
1. Press the **Add New** button.
2. Enter Primary and Secondary selections.
3. Press the **Save Changes** button.

*This is a Non-mandatory field, however, if a Primary classification is specified, then a **Secondary** classification needs to be specified.*

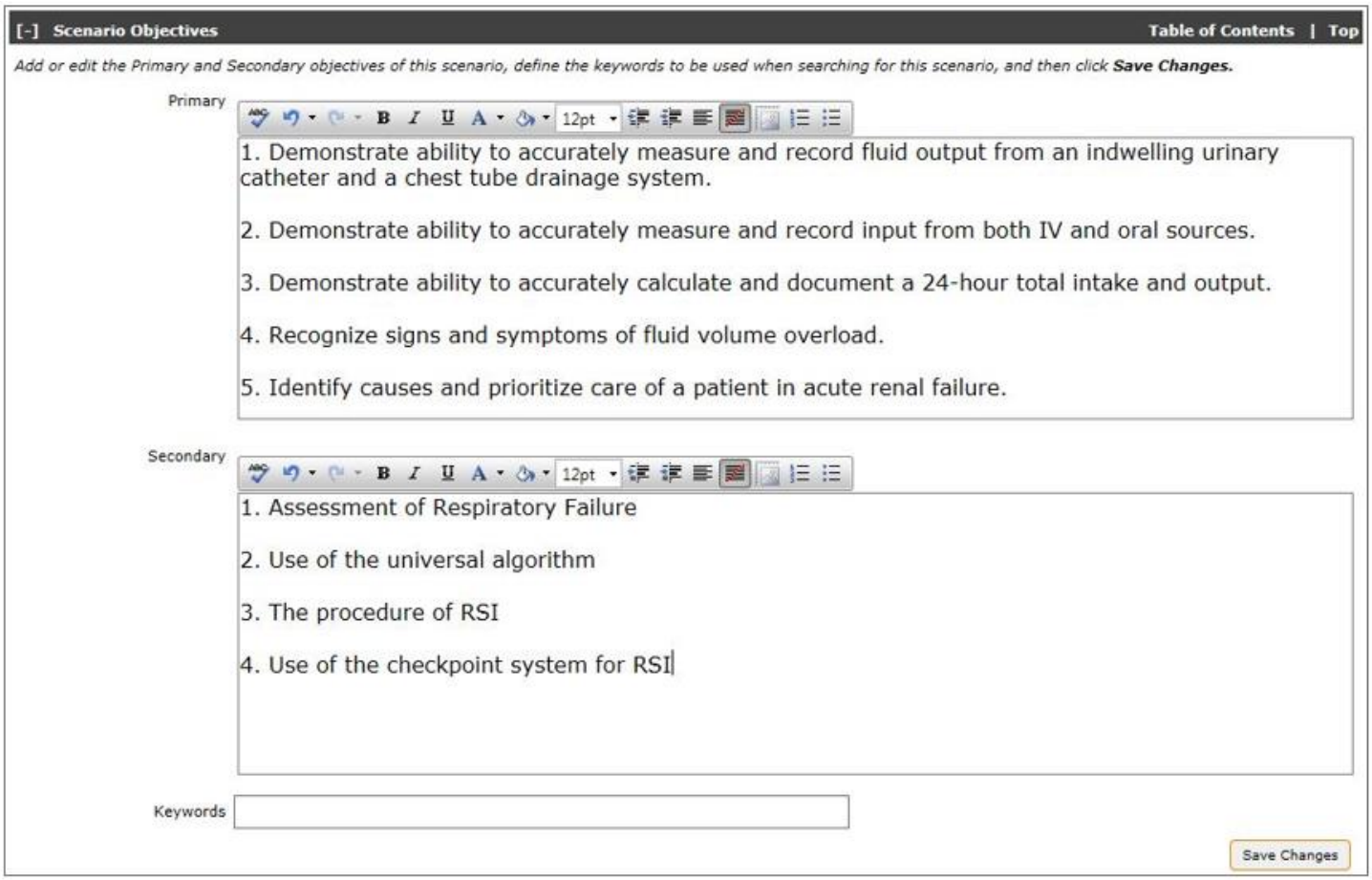
To manage a classification:

1. Press the **Manage** button.

2. The following appears (press **Add** to include a new classification or click a link in the Primary or Secondary column to edit an existing classification)..
3. Click the X in the Delete column to delete a classification.



Scenario Objectives



Add or edit the Primary and Secondary objectives of this scenario, define the keywords to be used when searching for this scenario, and then click **Save Changes**.

Application Workflow

Add or Edit Scenario Objectives

Defines a purpose for the scenario. This is optional.

1. Click in the text field and add your objectives:

   Primary Objective

   This can range from just a sentence to a list of objectives (for example, identify causes and prioritize patient care).

Secondary Objective

Keywords – (Optional) Indicate keywords here which will act as a filter when searching for this objective, using the Search tab on the Cases and Scenarios landing page.

2. Click the **Save Changes** button.

Follow-Up Visit: Scenario

Follow Up Visit would be used for a case or scenario with a relationship to another case(s) or scenario(s). For example, you could have scenarios Cardiac Basic and Cardiac Advanced. In this case, Cardiac Basic would be the Original Scenario and Cardiac Advanced would be the Follow Up Scenario.

A case or scenario can have a follow-up visit(s) associated with it, or it can be made a follow-up visit and its original case can be designated here. Also, an SP case can be marked as a follow-up to a scenario and vice versa.

This scenario can be the original visit to another case or scenario, referred to as the "follow-up" visit, or this can be a follow-up visit to an original case or scenario. Specify whether or not this is a follow-up visit to a previous scenario or this is the original visit to another scenario. If using an EHR patient, that patient's records can follow subsequent scenarios to show the progression of the patient.

Application Workflow

► After an initial encounter, the learner can meet with the simulator (or SP) again for a follow-up visit(s).

► The Patient EHR follows the patient for follow-up visit.

► Follow-up cases or scenarios are searchable criterion.

Make this Case or Scenario a Follow-Up

1. If this is a follow-up visit to an initial visit, click the checkbox next to **Make this Case or Scenario a Follow-up** case. *When this checkbox is checked, the Add Original Case (or Scenario) button is available.*

2. Click **Add Original Case (or Scenario)** button to search for and add the original case or scenario.

Original Case

1. To add an original Case (or Scenario), click the **Add Original Case (or Scenario)** button. This enables the user to search for the Case or Scenario that will be designated as the original to a follow-up Case or Scenario.

2. Cases and Scenarios listing window will pop up.

3. Search can be filtered by All, Name, Title, or Type.

4. Locate case or scenario to be the parent (*original case or scenario*) to this follow-up.

5. Click its **checkbox** and click the **Add** button.

Follow-up Case

There can be more than one follow-up visit to an original case.

1. To add an additional follow-up case, click the **Add Follow-up Case (or Scenario)** button. This makes this case or scenario an original visit to another case or scenario.

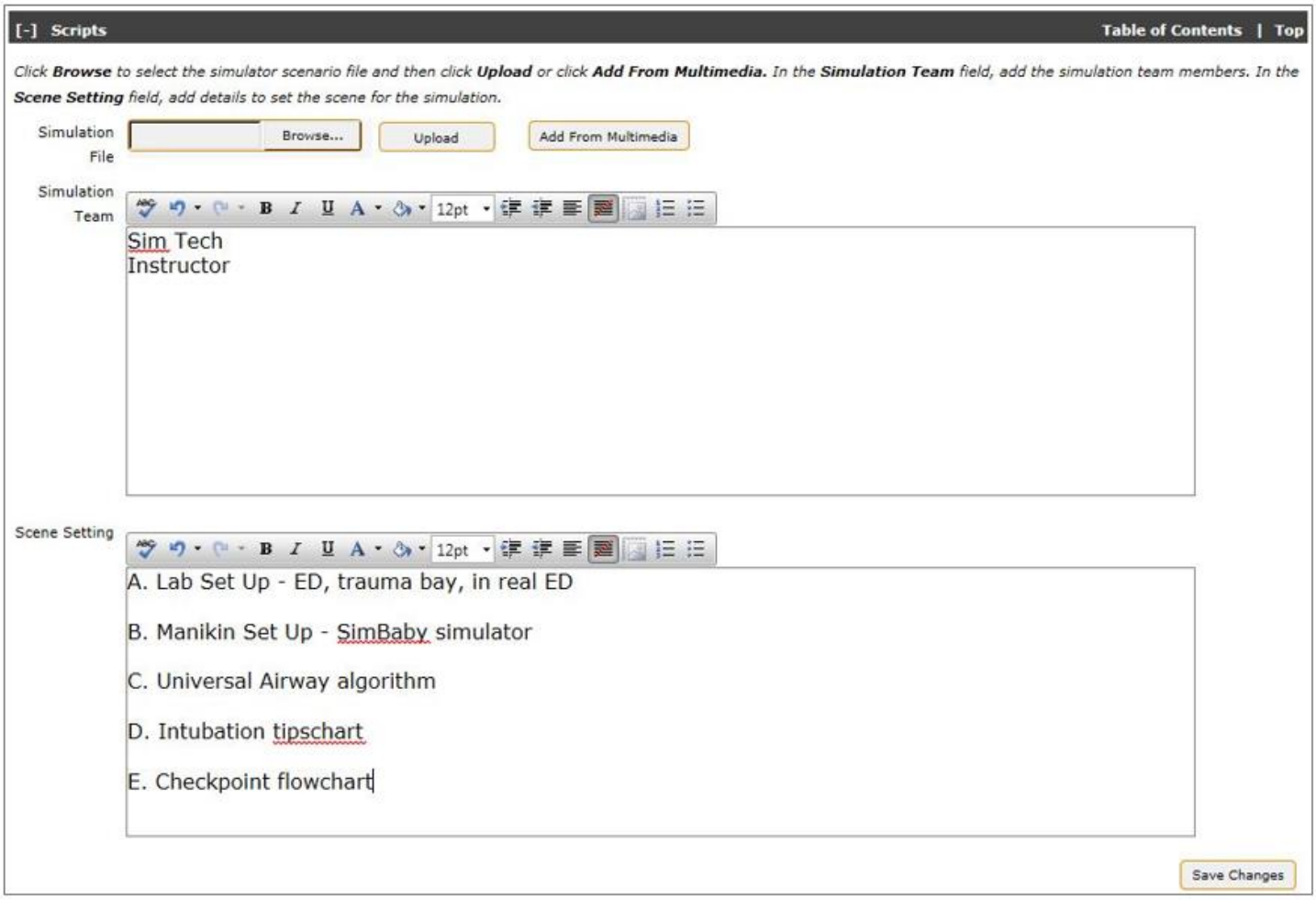
2. The Cases and Scenarios window will pop up, listing cases and scenarios in database. Search can be filtered by **All, Name, Title,** or **Type.**

3. Select the **checkbox** next to the case(s) or scenario(s) to be listed as a follow-up case.

4. Click the **Add** button.

5. **Save Changes** for this section.

Scripts



Use the **Scripts** section to upload scripts, specify team members needed for the scene, and describe the **Scene Setting**, **Supporting Roles**, and **Learner Roles** to aid in the scenario's role play (you may add a separate document or image file that the participants, educator and/or the AV controller will use as a guide during the scenario).

Simulation File

► *To assist in the simulation, documents, images, and multimedia files can be uploaded from your computer or from the Multimedia Library. Only one file can be uploaded with a maximum size of 2GB.*

Upload a file

1. Click the **Browse** button.

2. Navigate to the file name to be uploaded; click the **Open** button.

3. Click the **Upload** button.

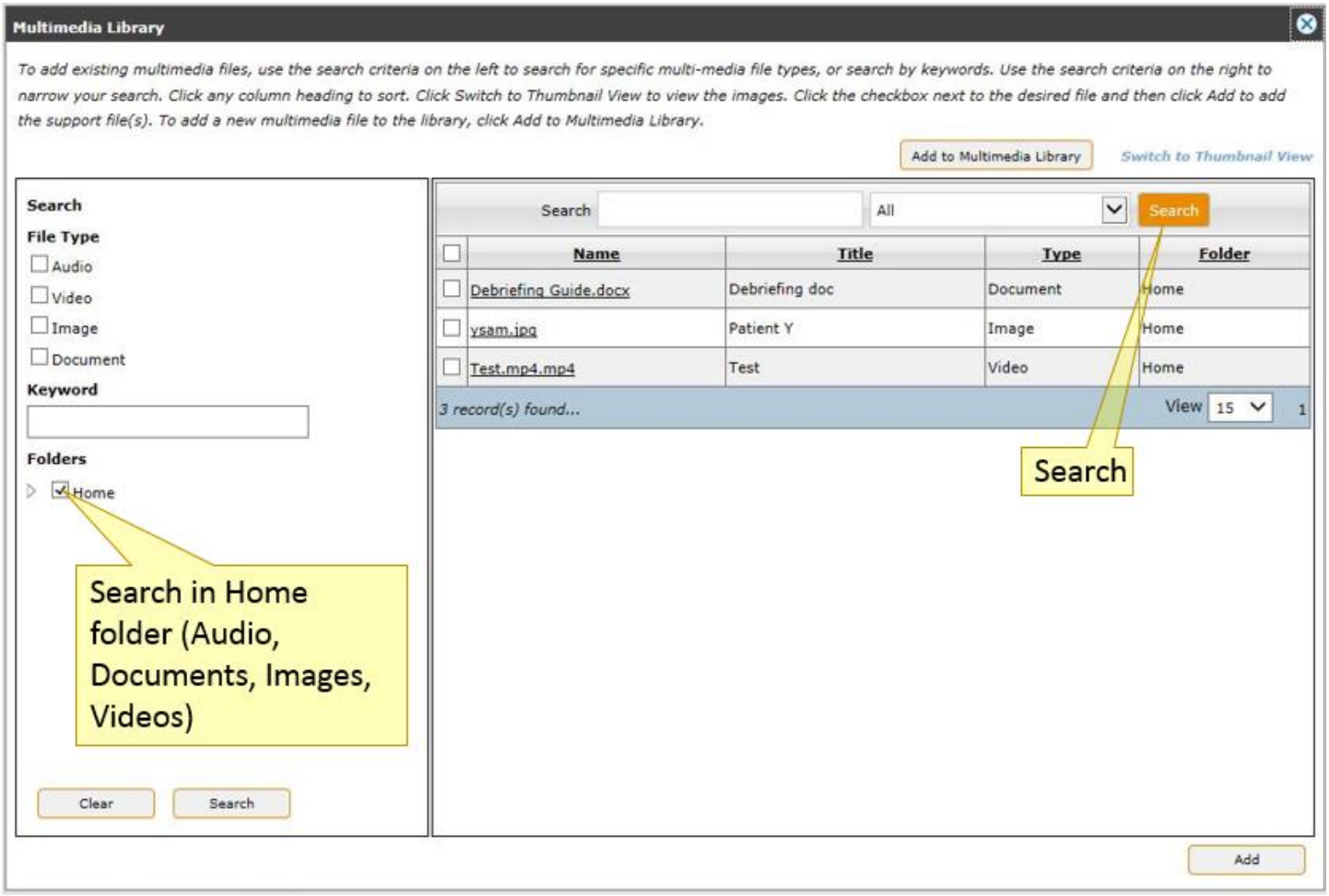
To view uploaded file

1. Click the link of the file name just uploaded.

2. The File Viewer window will pop up.

If this is a document (.doc, .docx, .xls, xlsx, .pdf, .ppt, .pptx, .txt) and you are unable to preview it, then click the link to download the file. If this is an image (.bmp, .jpg, .jpeg, .GIF, .TIFF, .PNG), then use the controls (+/-) below the Image to zoom in or zoom out.

Multimedia Library



Clicking on **Add From Multimedia Library** will bring up the Multimedia Library window where you can search the Multimedia Library database; select a file from the list on the right; or, in the left pane, upload a file from your **Home** folder.

Add from Multimedia Library:

1. Click the **Add From Multimedia** button.

2. Select from the list of multimedia files already in the Video database, or search for a particular file by file Name, title of case or scenario, or file type.

3. Or, use the **Search** area to the right to search by Audio, Video, image or Word document or type in keywords. Check the Home folder checkbox if you would like to search in any of those folders.

4. Click **Search**.

5. Click the **checkbox** to left of the file name.

6. Click the **Add** button.

7. Only one file can be uploaded.

8. To delete uploaded Support File, click the **Clear** button next to the listed file.

9. Click the **Save Changes** button.

Simulation Team

This is used to describe the roles needed to portray the scenario (i.e., Nurse, Respiratory Therapist, etc.).

Specify roles:

1. Click in the text field and type the information describing the roles that participants will be playing, the quantity of players in each role, and any other notes concerning the roles (Who will be involved in facilitating the scene? For example, Instructor, Sim Tech, 1 respiratory nurse, etc.).

2. Text formatting tools are available on the mini-menu bar.

More detailed instructions can be indicated in the Events section below.

Scene Setting

Describe an overview of the scenario here. Information may include patient history, ailment, health background, preliminary treatment, etc.

Specify Scene Setting:

1. Click in the text field and type the information describing the scene and/or patient information. For example:

    a. Lab set up – ED, trauma bay, in real ED

b. Manikin set up – Sim Baby simulator
c. Universal Airway algorithm
d. Checkpoint flow chart
e. Food tray with Jello on it

2. Text formatting tools are available on the mini-menu bar.

Supporting Roles

Supporting Role

*To define the supporting roles required for the scenario, click **Add New.** To edit, click the **Edit** icon next to the desired role. To delete, click the **Delete** icon next to the role you wish to delete. When you complete the Supporting roles, click **Save Changes.***

Add New

List

Name	Description	Number	Delete
Consultant	Unavailable when paged	1	
Physician	Responds as clinical leader of the MET team	1	
RN1	MET Team RN: Responds to all orders appropria tely, assists with management	1	
RN2	Ward nurse (Assistant); Provides collateral histo ry when asked	1	
RT	Med team RT participates in resuscitation	1	

5 record(s) found... View 15 1

Save Changes

This area defines the names, descriptions, and quantities of the specialist/actor roles *(extra support actors to help in portraying the scene)* required for the scenario, for example, the "concerned family member." They are not graded.

Supporting Roles are listed by: **Name, Description, Number** *(quantity).*

Edit an existing Supporting Role:

1. Click the Role **Name** hyperlink under the **Name** column to edit.

2. Edit by typing in the **Name**, **Description** or **Number** field. A maximum of 1,000 characters are allowed for the Description.

3. Click the **Update** button.

Add a Supporting Role:

1. Click the **Add New** button.

2. The **Add Specialist**window will pop up.

3. Type the **Name** (*mandatory*) of the **Role** (i.e., Consultant, Physician, etc.).

4. Type a **Description** (*optional*) of the actor's role-play *(i.e., Unavailable when paged*).

5. **Number** (*mandatory*)– Indicate how many actors are needed in that role.

6. Click **Update**.

7. The Role's **Name, Description, and Number** (*quantity*) are now listed on the list.

8. **Save Changes**.

To Delete a Role:

1. Click the red **X** icon in the **Delete** column of the role to be deleted.

2. **Save Change**.

Learner Roles

Learner Role

*To define the student roles required for the scenario, click **Add New.** These roles will be used to create the checklists for assessment. To edit, click the **Edit** icon next to the desired role. To delete, click the **Delete** icon next to the role you wish to delete. When you complete the Learner roles, click **Save Changes.***

Add New

List

Name	Description	Delete
Data gatherer	Data gatherer	⊗
First Responder	First Responder	⊗
Medical Outreach Team	Medical Outreach Team	⊗
Team Leader	Team Leader	⊗
4 record(s) found...	View 15	1

Save Changes

These are the learner roles, used to assign evaluations according to the role they play as well as to identify their purpose in the video. Specify the names of the roles and descriptions of the learner roles (for example, physician, charge nurse, etc.). Be sure to press **Save Changes** in this section so it will be possible to add a performance evaluation for a role.

Edit an existing Role:

1. Click the Role **Name** hyperlink to edit.
2. Edit by typing in the **Name or Description** field.
3. Click the **Update** button.

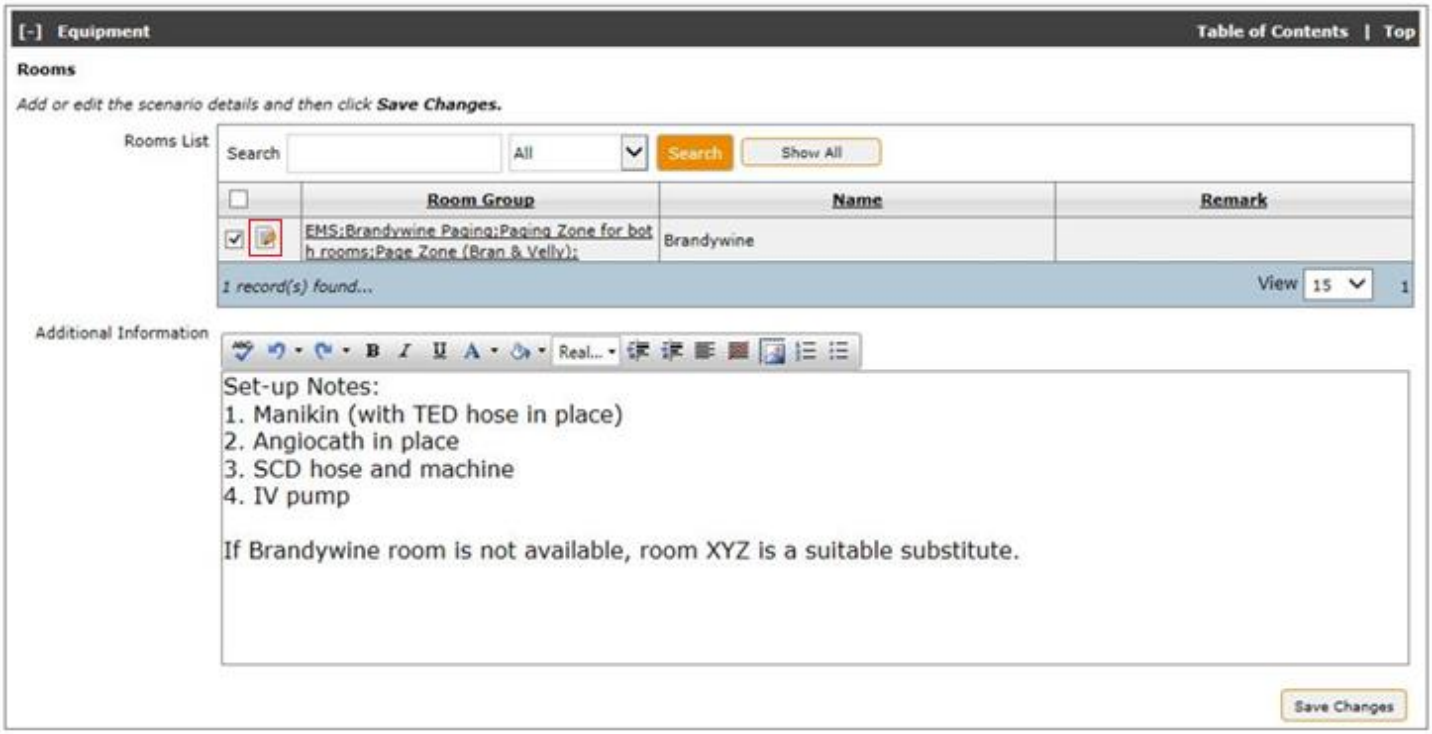
Learner Roles – Add a Learner Role:

1. Click the **Add New** button.
2. The Learner Role window will pop up.
3. Type the **Name** of the Role, *(i.e., Team Leader, First Responder).*
4. Type a **Description** of the learner's role-play (optional).
5. Click **Update**.
6. The role's **Name** and **Description** are now listed on the list.
7. Save **Changes.**

To Delete a Role:

1. Click the red **X** icon in the **Delete** column of the role to be deleted.
2. **Save Changes.**

Equipment



The Equipment added here is only requested equipment. Disposable supplies and drugs will not get deducted from inventory until this scenario is scheduled in the Session Calendar.

Specify the **Rooms**, **Capital Equipment**, **Supplies**, and **Drugs** and the quantity required for the scenario. Disposable supplies and drugs are deducted from inventory if marked as Disposable in Inventory. Remarks can be used to give further instructions about the setup.

Note: The icon next to the room indicates that access restrictions have been enabled; click here for more information.

Rooms

► *Specify rooms to be used for the case or scenario and debriefing here. The room should be appropriate for your case or scenario (i.e., Sim Room, Conference Room).*

► *Rooms that have been added to the database through the **Settings** task > **AV Configuration> Rooms** will be listed as options.*

Search for a room:

1. Room searches can be filtered by **Name, Room Group** *(rooms can be grouped by similarity, i.e., Sim rooms, patient rooms, or by geographic areas)*, **Remark** *(used to add a note about how the room should be setup for simulation)* or by **All** rooms. Select the respective label from the drop-down menu and then click **Search**.

2. To quickly see all rooms in your database, click **the Show All Rooms** button.

3. **Additional information** text field – type in any additional information or instructions here about the room in general, not pertaining to the scenario.

To change a room:

1. Click the **Show All Rooms** button.

2. A list of rooms will populate in the Room List box.

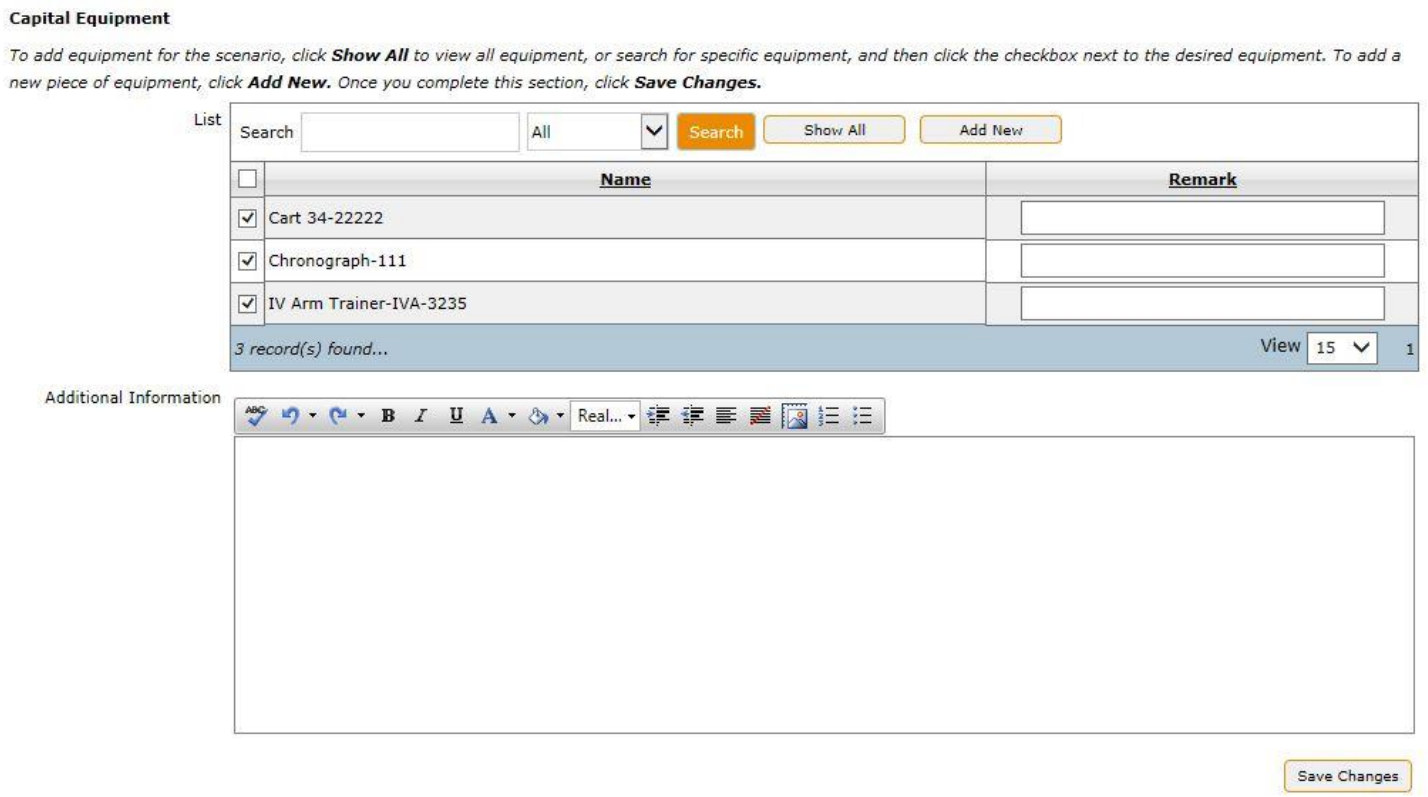
3. Click the **checkbox** next to the room that you want to add.

4. **Save Changes**.

Capital Equipment

► Capital equipment is non-disposable inventory stored and owned by the Organization Unit. For example: hospital bed, cardiac monitor, simulator manikin.

► Each time a session is scheduled, the system will check the quantity on hand and the sum of quantities being used in sessions during that time. If the requested quantity is more than the available quantity, a message will be displayed; however, the equipment and session can still be scheduled.



► Specify the Capital Equipment to be used in a Scenario (Capital Equipment usage can be tracked in the Inventory Utilization Report).

► The Administrator will be prompted via email alerts about any inventory items that are going out of stock, or are below threshold value.

► Use Remarks to add a note about how the capital equipment should be set up for simulation.

Search for Capital Equipment to add to a scenario:

1. Searches can be filtered by **Name** or **Remark** or by **All** Capital Equipment in database. Select the respective label from the drop-down menu and then click **Search**.

2. **Additional information** text field – Type in any additional information here pertaining to the equipment in general, unrelated to the scenario.

3. To quickly see all capital equipment in your database, click the **Show All** Equipment button.

4. Click the checkbox to the right of the Capital Equipment from the list you would like to add to the scenario, type in any additional information in the **Additional Information** field.

5. Click the **Save Changes** button under the Additional Information box.

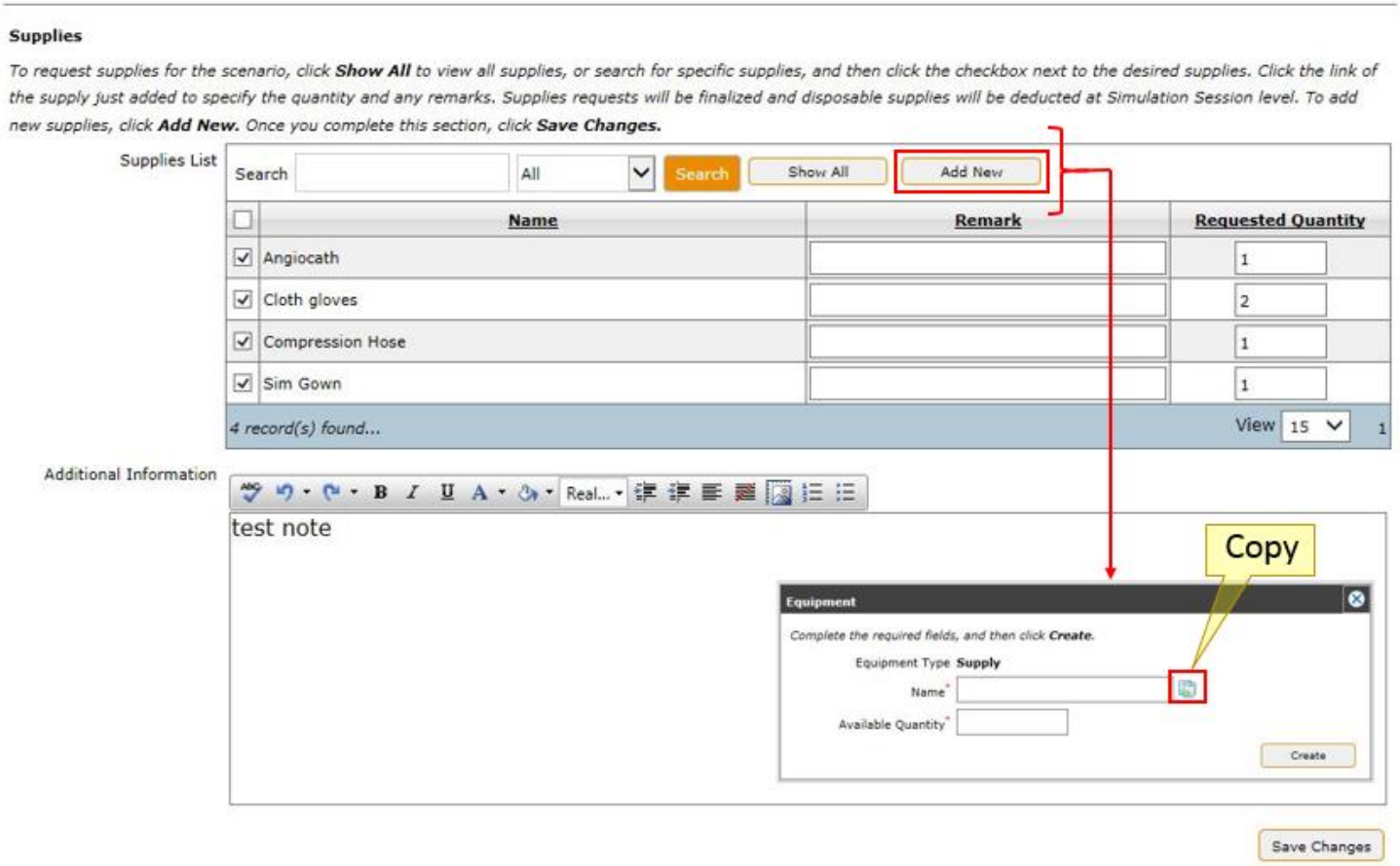
To add a Remark to Equipment already listed:

1. Type your **Remark** in the Remark field.
2. Click the **Save Changes** button.

Add New equipment to the list:

1. New capital equipment can be added to inventory by clicking the **Add New** button.
2. An Equipment Type: **Capital** window will pop up where the mandatory fields are **Equipment Name** and a **Unique ID** *(used in usage reports, and tracking inventory and status).* Click **Create**.
3. New inventory can be copied based on an existing entry in the database by selecting the **copy icon** next to the Name.
4. To add more detailed information about the equipment, such as warranty, invoice number, etc., see the **Settings** task group >**System Administration > Inventory> Capital Equipment**.
5. **Save Changes**.

Supplies



Specify the supplies needed for the scenario.

► Supplies can be disposable or non-disposable.

► Disposable supplies will be deducted from inventory upon the scenario being scheduled in a session.

► For non-disposable supplies, the system will check the quantity on hand and the sum of quantities being used in sessions during the time a session is scheduled.

► If the requested quantity is more than the available quantity, a message will be displayed; however the session can still be scheduled.

Search for supplies to add to a case or scenario:

1. Searches can be filtered by **All, Name**(used to add a note about how the supply should be set up for simulation) or byDescription.

2. In the **Supplies List** box, type the name in the text field or select the respective label from the drop-down menu.

3. Click the **Search** button.

4. **Additional Information** text field – Type in any additional information here.

5. To quickly see all supplies in your database, click the **Show All** Supplies button.

To edit a supply already listed:

1. Edit by typing in the **Remark** or **Quantity** field.

2. **Save Changes.**

To add a New supply to be listed for this scenario:

1. New supplies can be added to inventory by using the **Add New** button.

2. An **Equipment Type: Supply** window will pop up. The mandatory fields are **Name** and **Available Quantity** (used in usage reports and for tracking inventory and status.)

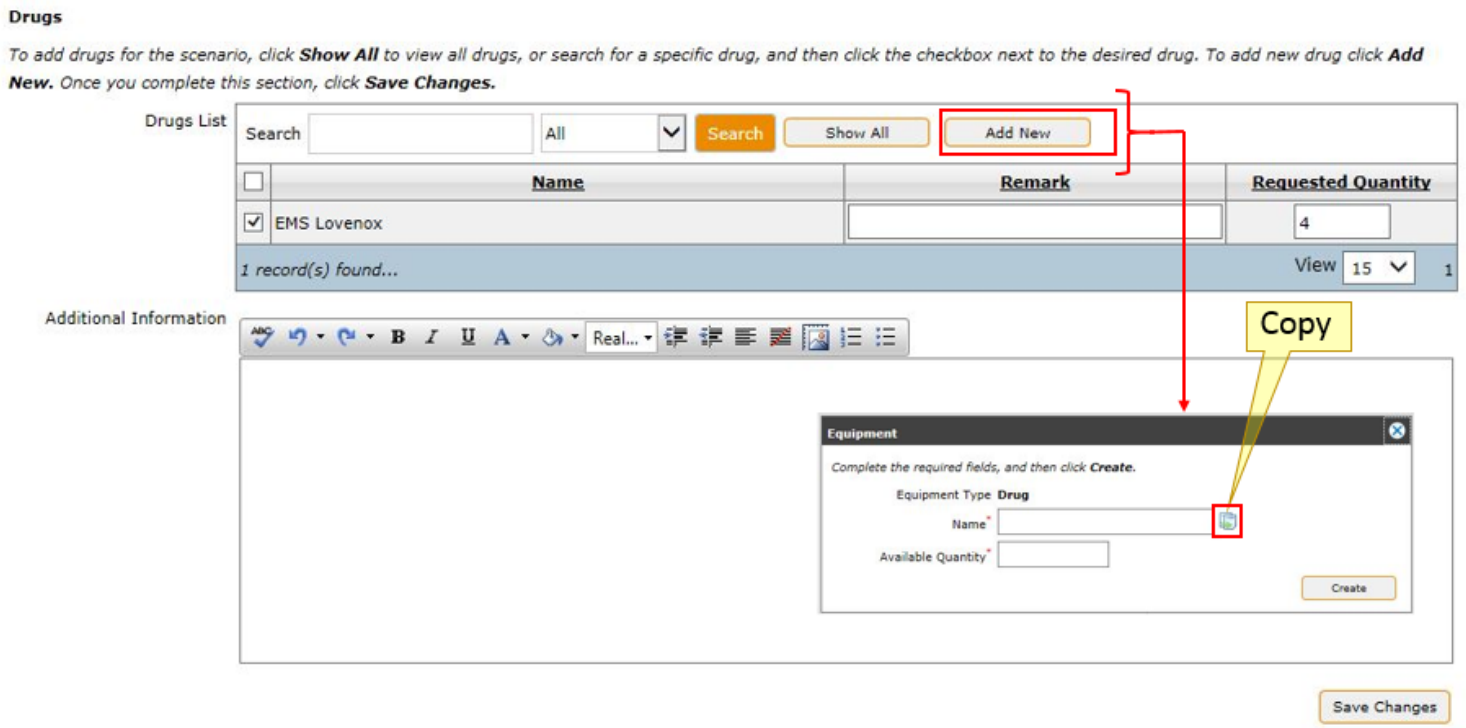
3. Click **Create**.

4. New inventory can be copied based on an existing entry in the database by selecting the copy icon next to the **Name** field.

5. To add more detailed information about the equipment, such as warranty, invoice number, status, and description, go to **Settings** task group >**System Administration > Inventory> Supplies**.

6. **Save Changes**.

Drugs



Specify the drugs needed for the scenario. Drugs are a disposable supply and will be deducted immediately from inventory when the session is scheduled.

Search for Drugs to add to a case or scenario:

1. Searches can be filtered by **All, Name,** or by**Description**. In the Drugs List box, type the name in the text field or select the respective label from the drop-down menu and then click **Search**.

2. **Additional information** text field – Type in any additional information here.

3. To quickly see all drugs in your database, click the **Show All Drugs** button.

To edit a drug already listed in the database:

1. Edit by typing in the **Remark or Quantity** field.

2. Text formatting tools are available on the mini-menu bar.

3. **Save Changes**.

To add a New Drug to be listed for this scenario:

1. New Drugs can be added to inventory by the **Add New** button

2. An Equipment Type: **Drug** window will pop up. The mandatory fields are **Name and Available Quantity** *(used in usage reports and for tracking inventory and status.)* Click **Create**.

3. New inventory can be copied based on an existing entry in the database by selecting the **copy icon** next to the Name field.

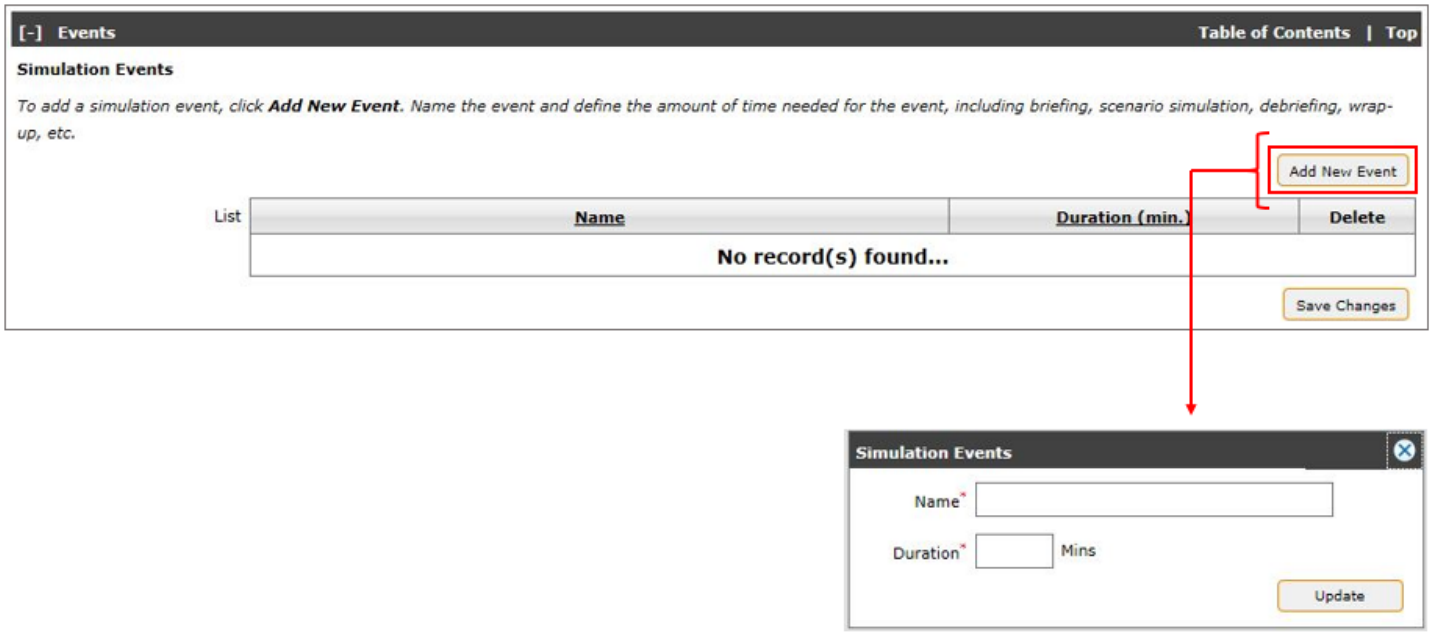
4. To add more detailed information about the drug, such as invoice number, status, and description, go to **Settings** task group > **System Administration > Inventory> Drugs.**

5. **Save Changes**.

Drugs are a disposable supply which will be deducted immediately from inventory upon being scheduled for a session.

The Administrator will be prompted via email alerts about any inventory items that are going out of stock, or are below threshold value if the inventory email alerts have been made Active in Settings > System Configuration > email Settings.

Simulation Events



Use this area to estimate the amount of time for each simulation event, i.e., briefing, scenario simulation, debriefing, wrap-up, etc.

To add a New Simulation Event:

1. Click on the **Add New Event** button.
2. The **Simulation Event** window will pop up.
3. Define the **Name** (mandatory).
4. Define the **Duration** in minutes (mandatory).
5. Click the **Update** button.

To edit a Simulation Event listed in the List box:

1. Click on the name of the event under the Name column.
2. The **Simulation Event** window will pop up.
3. Define the **Name** (mandatory).

4. Define the **Duration** in minutes (mandatory).

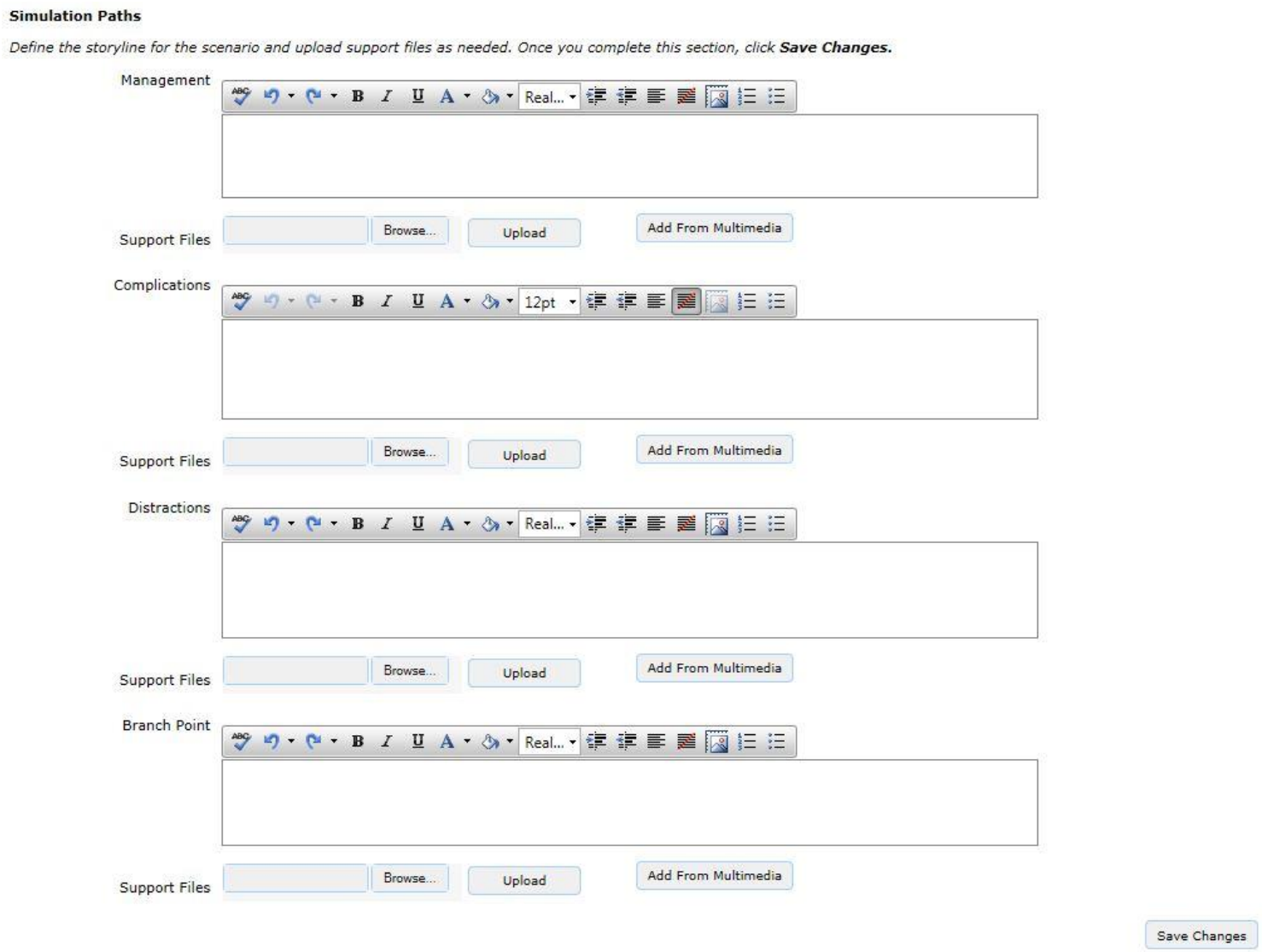
5. Click the **Update** button.

To Delete an Event:

1. Click the red **X** icon in the **Delete** column of event to be deleted.

2. **Save Changes**.

Simulation Paths



► *Use this area to specify the major events of the simulation: Management notes, the storyline, any Complications or Distractions, Branch Point, upload any supporting files, and add instructions for participants.*

This more specifically defines the management of the storyline: the complications, distractions, and Branch Point for the scenario. Upload support files as needed.

1. Type in the appropriate text field a description to assist in the:

   Management: Describe the overall management path for the scenario.

   Complication Path: Describe in this field any complications to the scenario (*i.e., Primary RN will not be knowledgeable about patient vital sign trends or whereabouts of equipment is unknown*).

   Distractions: Describe in this field any disturbances that are to occur (*i.e., spouse becomes hysterical*).

   Branch Point: Describe a possible turn of events that changes the course of the scenario and then describe the plan of action if it occurs.

   Example: Patient begins to show signs of worsening respiratory status; the M.D. is notified.

   Potential error paths:

   a. Wrong medication selection
   b. Preoxygenation with BVM actively or passively
   c. Right mainstem intubation
   d. Too much neck movement (not maintaining neutral position)

   Support Files: A file can be uploaded to aid in any event path.

   Documents, images, and multimedia files to assist in the simulation can be uploaded from your computer or from the Multimedia Library. *Only one file can be uploaded for each section with a 2GB maximum file size.*

2. **Save Changes.**

To Upload a file:

1. Click the **Browse** button.
2. Navigate to the file name on your computer to be uploaded; click the **Open** button.
3. Click the **Upload** button; the file name will be listed in this window.
4. Click the **Add** button.
5. **Save Changes**.
6. Only one file can be uploaded per section.

To view uploaded file:

1. Click the link of the file name just uploaded.
2. The File Viewer window will pop up.
3. If this is a document (.doc, .docx, .xls, xlsx, .pdf, .ppt, .pptx, .txt) and you are unable to preview it then click the link to download the file. If this is an image (.bmp, .jpg, .jpeg, .GIF, .TIFF, .PNG) then use the controls (+/-) below the Image to zoom in or zoom out.

Add From Multimedia: *(Only one file can be uploaded)*

1. If file is located in the Multimedia Library (**Items Library > Multimedia**), click on this button and the Multimedia Library window will pop up displaying a directory of the files in the Multimedia Library.
2. Click the **checkbox** to the right of the file name you want to upload.
3. Click the **Add** button.
4. Use the **Search** feature in this window if you need help in locating the file in the Multimedia Library list.

5. **Save Changes**.

To delete uploaded Support File:

1. Click the **Clear** button next to the listed file.

2. **Save Changes**.

Items from the Multimedia Library database reside in ***Items Library > Multimedia.***

Simulation Guides

► Simulation Guides are instructions for the participants in the scenario or simulator tech to guide them through the scene.

To add a new guide:

1. Click **Add New Guide** button.

2. The **Simulation Guides** window will pop up.

3. Enter a **Name** (*mandatory*) in the name field.

Upload a document:

1. Click the **Browse** button and navigate to the **Simulation Guide** file on your computer.
2. Click **Open**.
3. Click the **Upload** button; the file name will be listed in this window.

Add From Multimedia:

1. If file is located in the Multimedia Library (**Items Library > Multimedia**), click on this button and the Multimedia Library window will pop up displaying a directory of the files in the Multimedia Library.
2. Click the **checkbox** to the right of the file name you want to upload.
3. Click the **Add** button.

4. Use the **Search** feature in this window if you need help locating the file in the Multimedia Library list.
5. **Save Changes**.

Only one file can be uploaded.

To edit an existing event:

1. Click the name hyperlink in the List box of the event to be edited.
2. A **Simulation Events** window will pop up.
3. Edit the **Name** and/or the **Duration** of the event.
4. Click the **Update** button.
5. **Save Changes**.

To delete an event:

1. Click the red **X** icon in the **Delete** column of the event to be deleted.
2. A message window will pop up asking if you are sure you want to delete the event.
3. Click **Ok**.
4. **Save Changes**.

Debrief

► Debriefing is the time period after a case or scenario when a faculty member or manager meets with the learner or team of learners to review the performance. Define the debrief plan in a document and then upload the support files to be reviewed during debriefing.

Application Workflow

To add a new debriefing plan document:

1. Click **Add New** Guide button.

2. The **Debrief** window will pop up.

3. **Upload a document**:

   Click the **Browse** button and navigate to the **Simulation Guide** file on your computer.

   Click **Open**.

   Click the **Upload** button; the file name will be listed in this window.

4. **Add From Multimedia**:

   If file is located in the Multimedia Library (***Items Library > Multimedia***), click on this button and the Multimedia Library window will pop up displaying a directory of the files in the Multimedia Library.

   Click the **checkbox** to the right of the file name you want to upload.

   Click the **Add** button.

   Use the **Search** feature in this window if you need help in locating the file in the Multimedia Library list.

5. **Save Changes**.

   Only one file can be uploaded.

   To edit an uploaded file, the document link will need to be removed from the list and a new one re-uploaded:

1. Click the event's filename hyperlink in the **Document List** box.

2. A **Debrief** window will pop up.

3. Click the **Clear** button to remove it from the list, if needed.

4. Click the **Update** button.

5. **Save Changes**.

To view the document in the list:

1. Click the event's filename hyperlink in the **Document List** box.
2. A **Debrief** window will pop up.
3. To view the document, click on the document link.
4. The **File Viewer** window will pop up with a preview of the uploaded file. If it cannot be previewed, click on the link in the window to download. If the document needs to be edited, download it, resave it, and then re-upload it.

To delete an event:

1. Click the red **X** icon in the **Delete** column of the event to be deleted. A message window will pop up asking if you are sure you want to delete the event. Click **Ok**.
2. Or, click on the event's filename hyperlink in **the Document List** box.
3. A **Debrief** window will pop up.
4. Click the **Clear** button to remove it from the list, if needed.
5. Click the **Update** button.
6. **Save Changes**.

Evaluation Summary – Scenario

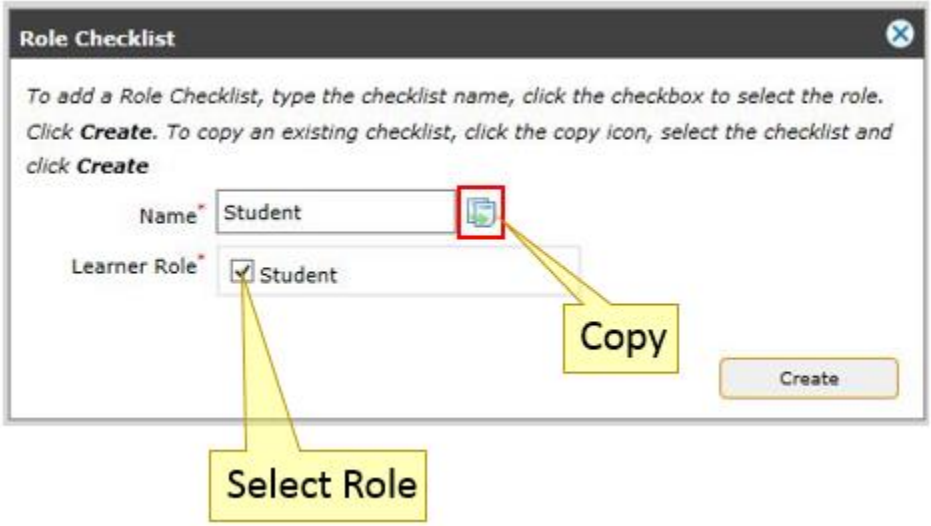
Use this section to:

► Add and edit checklists for the Evaluator to assess the learner's performance.

► List the Learner roles that are designated in the Scripts section of the scenario's Activity Page and apply the checklist questions to each role.

► Specify a checklist to assess the team as a whole with a Team Performance Assessment.

► Question Scores from the responses of the Evaluator can be exported and generated in a report for each learner and for a range of session dates.



Click on the links to add questions from the Items Library or create new ones using the Add Question button; you can also add new questions to the Items Library.

Important: Categories and questions need to have a weight of at least "1" so the data can be collected for scoring. Scores are the credit the learner will receive for choosing the correct response. Scores can have a zero or even a negative value.

Add a checklist and associate it to a role:

1. Click on **Performance Assessment** link in the Evaluation Summary section.

2. Click the **Add New Checklist** button.

3. Type in a name for the checklist *(For ease in identification, it is recommended to use the name of the Learner Role).*

4. A checklist can be copied and/or renamed by clicking on the **Copy** icon next to the **Name** text field. *(This is helpful if using an existing checklist from **Cases & Scenarios > Checklist** or adding the same checklist for multiple learners in the same role, such as 2 nurses).*

5. Select the **Learner Role** by clicking on the checkbox next to the name listed. *(A Learner role needs to be specified in the Scripts section of the scenario's Activity Page for it to be listed here).*

6. **Save Changes**.

Performance Assessment Checklist Pop-up Window	Delete a Question or Category		Edit a question or category		Copy a question
Add from Library	Add Question from Library	Add New Question	Delete	Edit	Copy

Team Performance Assessment

Performance Assessments require a Category. The category is a user-defined term, usually depicting the skill being assessed. It also specifies the grading and the response type for the entire category. This makes it easier to create similar questions within the category; however, the grading and the response type can be changed on a per question basis.

Individual checklist questions can be assigned to a specific role that the learner will portray. The number of ***Learner Roles added in the Scenario activity page's Script section*** *will dictate how many role-based checklists can be added here.*

Use this window to:

► Apply and/or edit the checklist questions for each learner role.

► Add instructions for the evaluator.

► Specify style format of the questionnaire.

► Print and Preview the questionnaire.

Performance Assessment Role Based Checklist

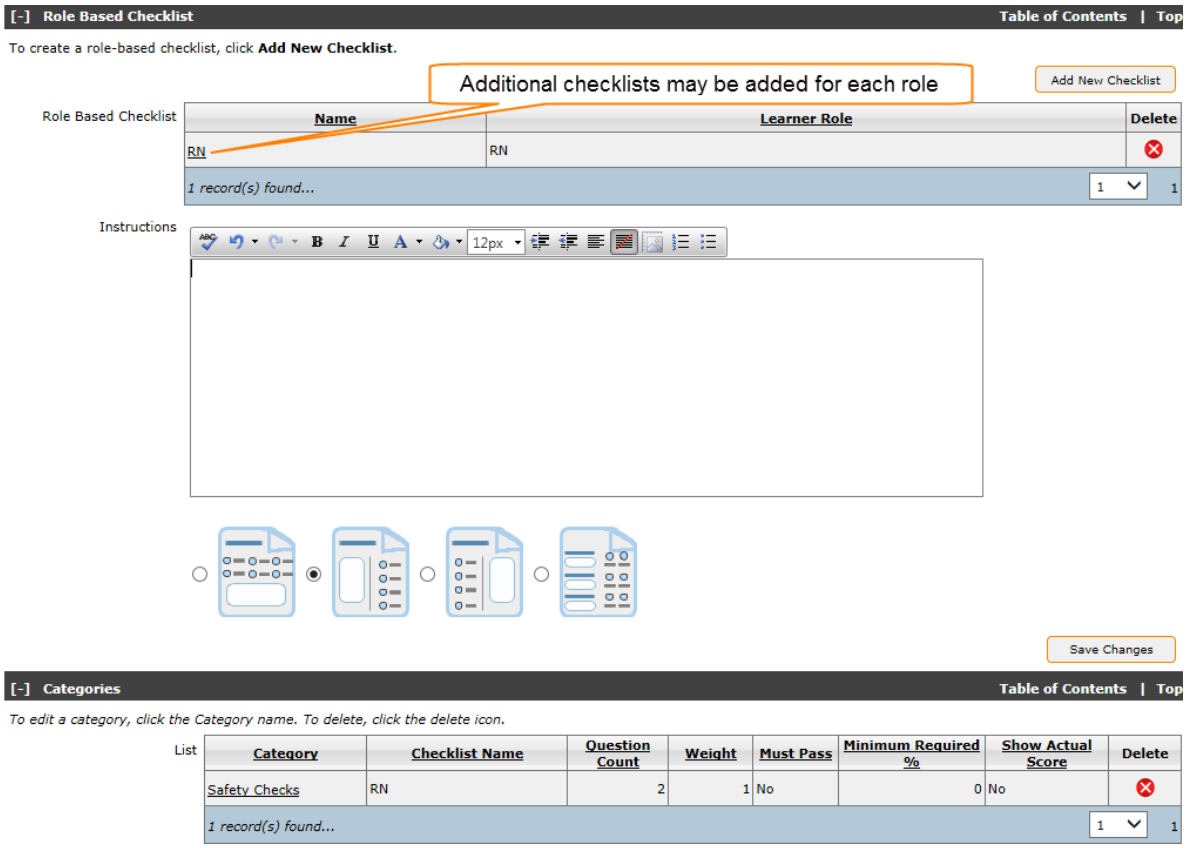
Use this window to:

► Add questions to the checklist for each role that will be evaluated.

► Add any instructions for the evaluator.

► Select a layout format for the questionnaire.

► The evaluator that is assigned when the scenario is scheduled will receive the Assessment checklist on their **Dashboard > To-Do-List**.



Back to Performance Assessment

Performance Assessment Checklist Pop-Up Window:

1. The Checklist Names and Learner Roles that were added in the previous steps are now listed in the pop-up window.

2. **To delete Checklist** - Click the red **X** icon in the **Delete** column of the checklist to be deleted, or uncheck the item on the Activity Page.

3. **Instructions** – Use this text field to enter any notes or instructions for evaluator (*Optional - Use the formatting mini toolbar to stylize your type*). **Save Changes**.

4. **Select Format** – Select the radio button for the style format of the checklist the evaluator will receive on their dashboard.

5. **Categories** will automatically populate in the Categories section when questions are added in next step.

6. **Questionnaire** sections are listed for each role that will be assessed.

7. Add questions to each role's Questionnaire section by either clicking the **Add From Library** button or create new questions by clicking the **Add Question** button. Click here to view detailed instruction for adding questions.

8. Questions can be searched by **Question Text, Type, Category or Weight** by selecting the appropriate drop-down menu next to the **Search** field and then clicking the **Search** button.

   Rearrange Question Order – When multiple questions are added to the **List Box**, the order of the questions in the checklist can be rearranged by clicking the drop-down arrow in the **Order** field and selecting the new chronological order.

   To save, click **Save Changes**.

9. The **Categories** field should now list the categories of the questions that were added to the Questionnaire List area.

10. **Instructions for Scoring** - Type in any instructions pertaining to scoring for the evaluator in this text field.

11. **Save Changes**.

12. **Buttons at the top of window**:

    Save All – Saves all changes made in this window.

    Print - Window can be printed by selecting the **Print** button at the top right of window.

Back to Performance Assessment

To delete a question or category:

*Click the red **X** icon in the **Delete** column of the question or category to be deleted, or to delete the entire checklist, uncheck it in the Performance Assessment section of the Activity Page.*

Back to Performance Assessment

To Edit a question or category:

1. Click on the name hyperlink.

2. The Question window will pop up.

3. Edit the question, or if changing categories, select a different category.

4. Click **Save Changes**.

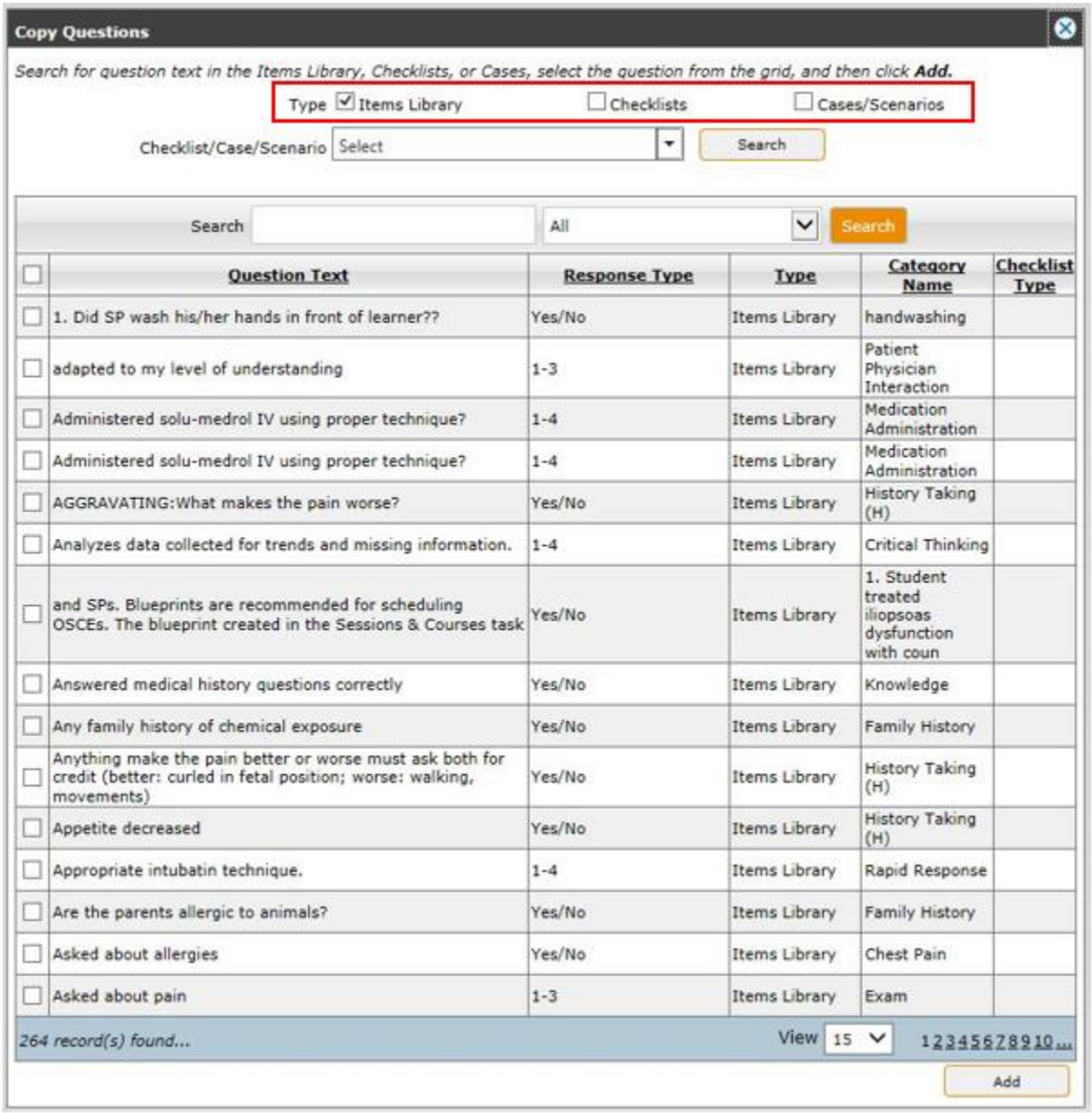
Back to Performance Assessment

Copy a Question:

Copy – Click the **copy icon** under the Copy column to make a copy of a question.

Back to Performance Assessment

Add Role-Based Checklist Question From Library



Add from Library Pop-up window:

Lists Questions already in the Items Library (Questions need to be in Active status and applicable as an Assessment question).

To add questions from Library:

1. Click the **Add From Library** button above the List box for the specific role's questionnaire.

2. The **Add From Library** button will open a **Copy Question** pop-up window, where a directory of questions from the **Items Library, Checklist, and Cases** *(that have been designated as an SP Assessment or Learn Assessment Checklist Type in* ***Cases & Scenarios > Checklist****)* can be listed.

3. Click the **Type** checkboxes to populate the Question list from the **Items Library, Checklists**, and/or **Cases** areas.

4. A question search can be filtered by **Question Text or Type** *(from the Items Library, Checklists or a Case)* by selecting the appropriate drop-down menu next to the **Search** field.

5. Click the **Search** button; the list will change according to the new search criteria.

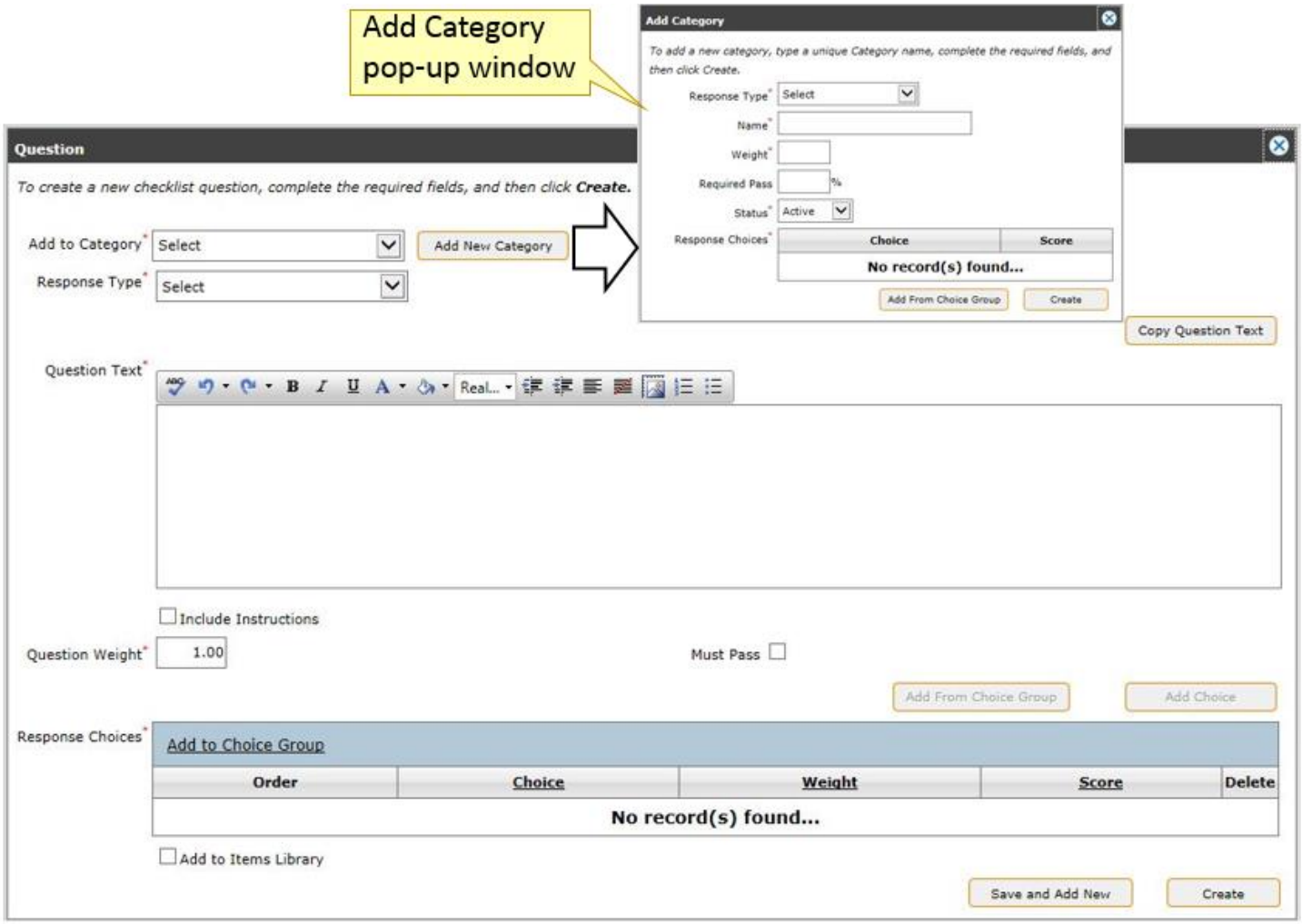
6. Click on the **checkbox** next to the question you want to add.

7. Click the **Add** button to add the question to the questionnaire.

8. **Response Type** column indicates the type of answer response required for the question. This can be customized by clicking on the Question Text's hyperlink in the List box.

Back to Performance Assessment

Add New Question



Question Pop-up Window:

To create a New Question, click on the Add Question button. Newly created questions can be added to the Items Library for future use.

Add Question

New questions can be created here (*this is basically the same as going to the **Items Library > Questions > New***). They can also be added from here into the Items Library so they can be available for use in any case or scenario.

1. Click the **Add Question** button.

2. A **Question** window will pop up where you can specify the Category, Question, Grading Information, and Question Response Type.

3. **Add to Category** – Select a Category that is already in the **Items Library > Categories** database by selecting the drop-down menu and selecting one of the categories listed. When the Category is selected the accompanying **Response Type** (*type of answers required*) will be listed. The response type can be changed within the category by using the **Customize** button. **Use Default Scoring** brings customized scoring to match the rest of the category.

Add New Category

5. **Add New Category** – Click the **Add New Category** button to define a new Category.

6. **The Add New Category pop-up window**:

Response Type – Select the type of response (*answer type*) from the drop-down menu*. (i.e., a Yes/No answer, a Likert Scale of 1-9, True/False, etc. You may use keyword scoring for free-text type questions, though this is not required. Free-text style questions may be read and scored by a faculty evaluator. When selecting Text with Keywords, identify the keywords and misspellings in the keyword dictionary. Enable keyword scoring for the question and then associate the keywords.)*

Name – Type a name of the Category *(based on the subject matter of the questions that will be contained in the category, i.e., Communication Skills, Physical Exam)*.

Weight – Enter the weight of this category. A question needs to be weighted for the choice to be counted in the scoring process. The default value is 1. This is used for calculating the weighted average mean score for the category, when multiple questions within a category are used. Questions within a category can be weighted differently, and some categories can be weighted differently than other categories. The system will adjust the score according to weight given. A weight of zero means the data can be collected but it won't count in the scoring process.

Required Pass % - (*Optional*) The minimum overall score that is needed for a student to pass the case. A zero in this box denoted that there are no minimum pass requirements for the case.

Status – Select the status of the question. Active means it is actively in the system and can be used in future cases and scenarios. Retired means inactive and ineligible for future use until made active again; this is a better alternative to deleting it, which would remove it permanently.

Response Choices – Click on the hyperlink under the Choice column and define the answer choice that pertains to the Response Type that was selected (i.e., Low/Moderate/Severe; or Poor/Good/Excellent, etc.) by labeling the choice in the Choice text field. A maximum of 255 characters can be entered at the Choice field.

Score – Indicate the amount of credit received by selecting this choice.

Click **Save** to return to the Add Category window.

When the fields are complete, click the **Create** button.

A message window will pop up asking if you want to create additional categories; click **Yes** to add another question or click **No** to return to the Question window.

Back to the Question window:

7. If a new category was added in the previous step, it will be available in the drop-down menu. Select the **Category** for your question.
8. If you want to copy text from a preexisting question, click on the **Copy Question Text** button - when this button is selected, a **Copy Question Text** box will pop up allowing you to select a question from the list; the question text will now be copied and pasted into the **Question Text** box.
9. **Question Text** – Type the question in this field *(Option - Use the formatting mini toolbar to stylize your type).*
10. **Include Instructions** – Click this checkbox if you want the instructions to be visible to the evaluator. When checked, the Instructions text field becomes visible, allowing you to type instructions.
11. **Question Weight** – Enter question weight. A question needs to be weighted for the choice to be counted in the scoring process. The default value is 1.0. This is used for calculating the weighted average mean score for the category, when multiple questions within a category are used. Questions within a category can be weighted differently, and some categories can be weighted differently than other categories. The system will adjust score according to weight given.
12. **Must Pass** – Check this box if the correct response to this question is mandatory for the learner to pass the entire exercise. Checking this box will populate the **Question Weight** and **Minimum Required** percentage to pass fields. These are mandatory in order to specify the conditions to pass.
13. **Customize** – Clicking on this button will enable customization of the Response Choices and populate a **Reset to Default** button, an **Add From Choice Group** button and an **Add Choice** button:

    Reset to Default – Deletes the customization of the response choice and resets to default.

    Add From Choice Group – Allows you to add a customized choice group that is defined in the **Items Library > Choice Group** task. The list can be expanded by clicking on the + sign to reveal the choice details. Make selection by checking checkboxes and clicking the Add button. *(Be sure to adjust the Response Type to match the total number of choices.)*

    Add Choice – This will add an additional Choice in the Response Choices box. Clicking on this button will open a Choice pop-up window (a maximum of 255 characters can be entered at the **Choice** field). If the checkbox for **Score and Weight is Applicable** is checked, Score and Weight needs to be indicated. Click the **Update** button.

Add to Choice Group – Click on this hyperlink to add your choices from the step above to the **Choice Group** database ***(Items Library > Choice Group)*** so it will be available for future use.

14. **Response Choices** – The order of the questions can be rearranged by selecting the numbers next to the questions.

15. **Limit Choices Required for Response** – When this is checked, the **Minimum Choices Required for Response** box and the **Maximum Choices Allowed** box will become available.

    a. **Minimum Choices Required for Response** - Set the minimum number of choices that can be selected.

    b. **Maximum Choices Allowed** – Set the maximum number of choices allowed to be selected.

16. **Score** – Based on the weight of each response choice, the Minimum score and the Maximum score are indicated. These can be changed by clicking on the Choice hyperlink and changing the score for each response or by checking Include Advanced Scoring Options.

17. **Include Advanced Scoring Options** – When this is checked, the Advanced Scoring Options box becomes available.

    a. Click the **Add Scoring Options** button to specify customized scoring for the **Score, Weight and Criteria**.

    b. When **Score and Weight is Applicable** is checked, enter the Score amount, Weight and Criteria for this choice by checking the choice checkbox, inputting the Score, Weight and Criteria.

    c. **Score** – Determine the amount of points credited for the correct answer. Check the correct choice and indicate that in the Score box. There may be multiple choices that are correct; if so, check those checkboxes and add the Score in the score box. Add the Weight in the weight box and then add the criteria *(number of correct choices to receive the score)*.

    d. **Criteria** – To specify the criteria for learner to pass this question, click the checkbox next to the choice(s) designated as the correct answer(s). Indicate the number of choices that are checked in the Criteria box.

       For example: If there are 3 choices and 2 are correct or are eligible to receive the amount of credit indicated by the Score, check those 2 choices, add the weight and the score for those choices and in the Criteria box, indicate 2.

    e. Click the **Add** button.

    f. Repeat for each choice by clicking on the **Add Scoring Options** button in the Response Choices box.

    g. Indicate the incorrect choice by selecting that choice's checkbox and adding 0 in the criteria box. Also put 0 in the Score box with a Weight of 1. A negative number can be indicated if points will be deducted for the incorrect choice.

    h. **Weight** must be at least 1 just so the data is collected; the Weight is not the score.

    i. Click the **Save Changes** button.

18. **Add to Items Library** – Click this box to add question to the Items Library database. This will enable the question to be available for any SP case or scenario. Clicking on this checkbox will

populate:

Applicable Checklists –SP Performance Assessment or Learner Self-Assessment: select either or both of these if the question can also be applied to these checklists.

19. **Save and Add New** – Click this button if you want to save this question and add additional questions. If not, click **Create**.

Back to Performance Assessment

To delete a question:

*Click the red **X** icon in the **Delete** column of the question to be deleted, or to delete the entire checklist, uncheck it in the Evaluation Summary section.*

Back to Performance Assessment

To Edit a question:

1. Click on the question name hyperlink.
2. The Question window will pop up.
3. Edit the question.
4. Click **Save Changes**.

Back to Performance Assessment

Copy a Question:

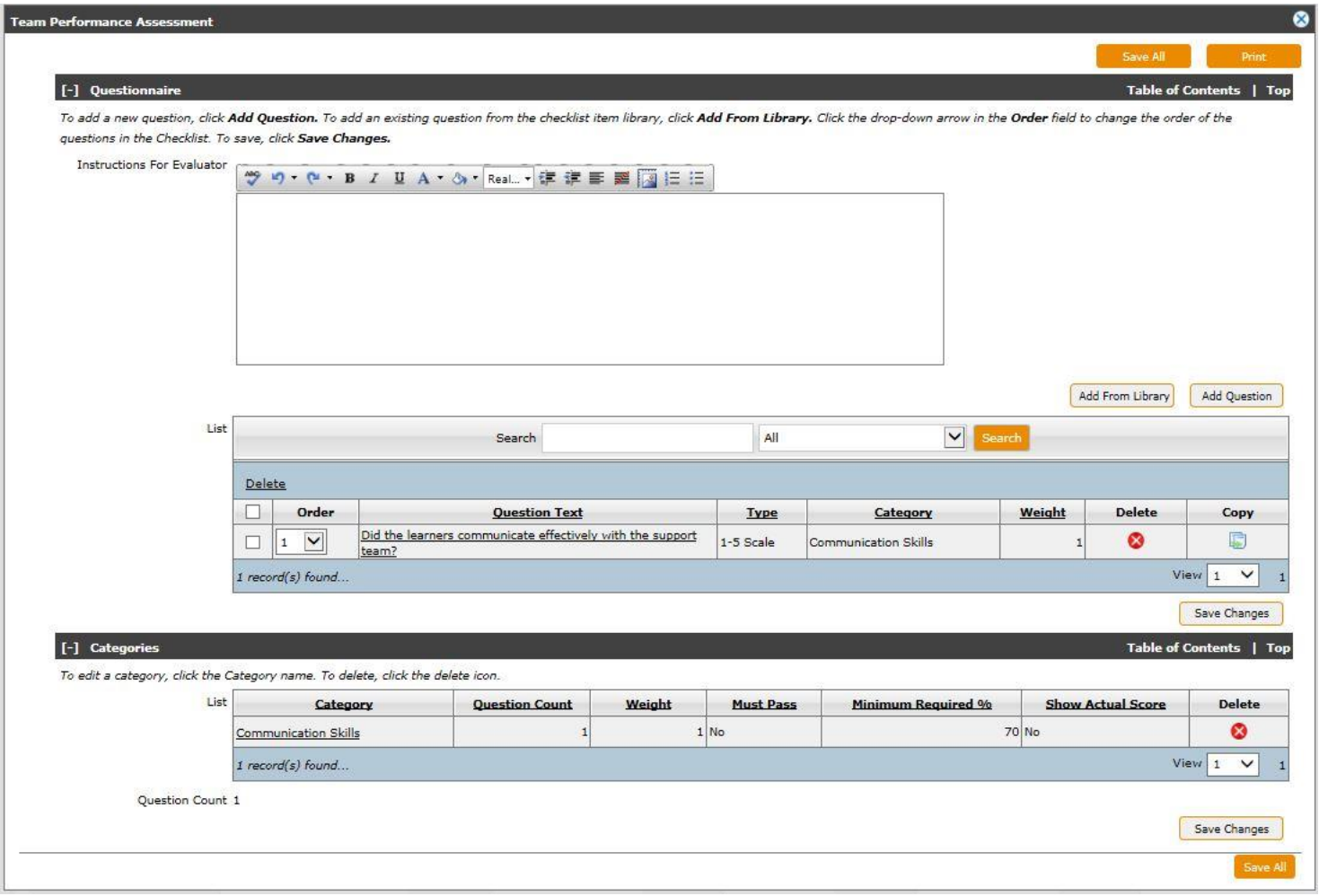
Copy – Click the **copy** icon under the Copy column to make a copy of a question.

Back to Performance Assessment

Team Performance Assessment

Team Performance Assessment Checklist Pop-up Window	Add From Library	Add New Question	Team Performance – Add Question

Performance Assessment



Use this window to:

► Add questions to the checklist for a Team evaluation.

► Add any instructions for scoring.

► Select a layout format for the questionnaire (when the participants log into the portal, the Assessment will be on their **Dashboard > To-Do List)**.

► Add instructions for the evaluator.

► Apply and/or edit the checklist questions to assess team of learners specified in a Team Session.

► Specify style format of the questionnaire.

► Print or Preview the questionnaire.

Team Performance Assessment Checklist pop-up window

1. Click the Team Performance Assessment hyperlink in the Evaluation Summary section of the Activity Page.

2. **Questionnaire Instructions for Scoring** – Type any instructions pertaining to scoring for the evaluator in this text field. *(Optional - Use the formatting mini toolbar to stylize your type.)*

3. Add questions in the List box by either clicking the **Add From Library** button or create new questions by clicking the **Add Question** button*. (See detailed instructions to add questions here.)*

4. Questions can be searched by **Question Text, Response Type, Type, Category Name or** Checklist Type by selecting the appropriate drop-down menu next to the **Search** field and then clicking the **Search** button.

5. **Rearrange Question Order** – When multiple questions are added to the List box, the order of the questions in the Checklist can be rearranged by clicking the drop-down arrow in the Order field and selecting the new chronological order.

6. To save, click **Save Changes**.

7. **Select Format** – Select the radio button of the layout you choose to use for the Evaluation form that the evaluator will receive on their dashboard.

8. The **Categories** field should now list the categories of the questions that were added to the Questionnaire List area.

9. **Save Changes**.

10. **Buttons at the top of window**:

    Save All – Saves all changes made in this window.

    Print - Window can be printed by selecting the **Print** button at the top right of window.

To Delete a Question:

*Click the red **X** icon in the **Delete** column of the question to be deleted, or to delete the entire checklist, uncheck it in the Evaluation Summary section.*

To Edit a Question:

1. Click on the question name hyperlink.
2. The Question window will pop up.
3. Edit the question.
4. Click **Save Changes**.

Copy a Question:

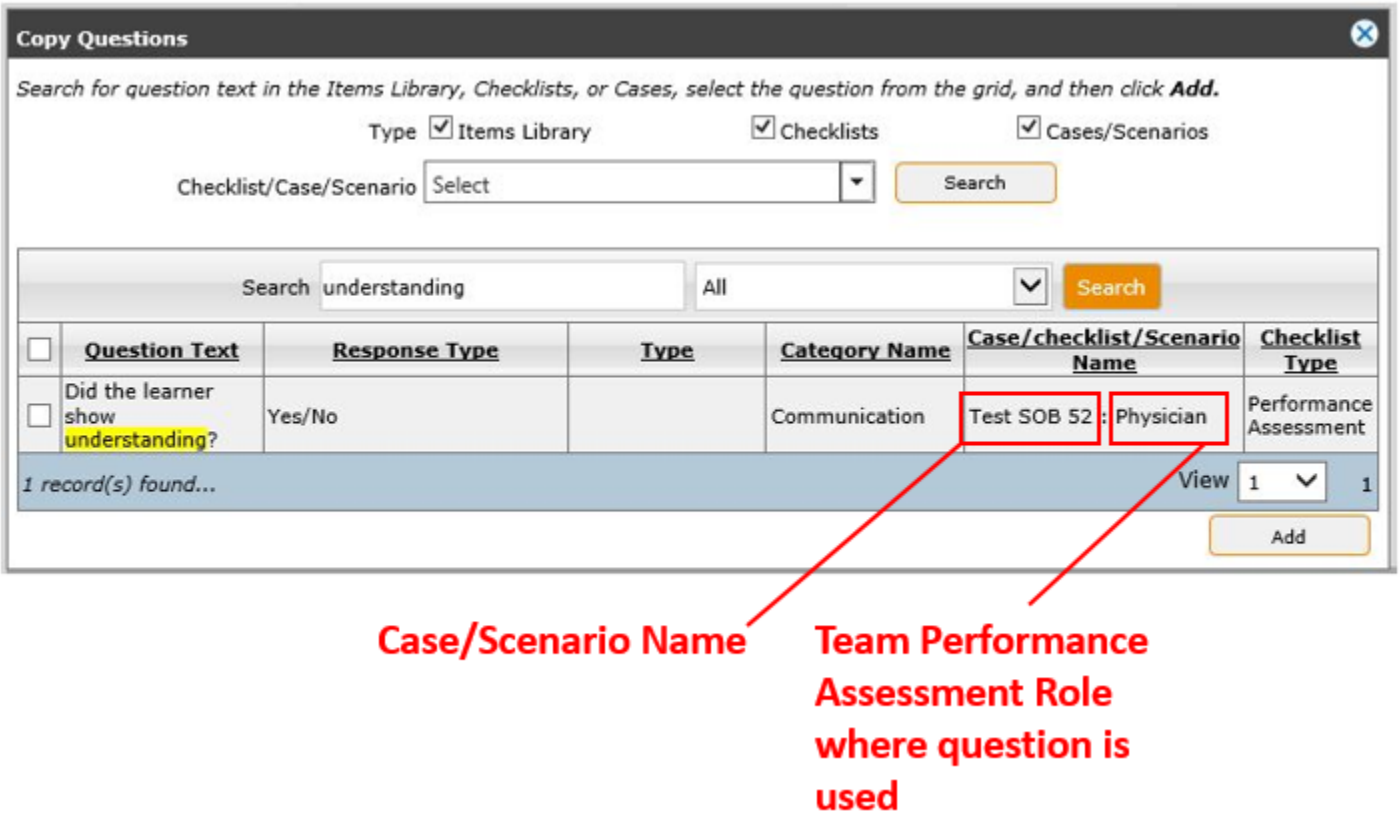
Copy – Click the **copy icon** under the Copy column to make a copy of a question.

Back to Team Performance Assessment

Back to Performance Assessment

Add From Library

Note: Questions assigned to a role in a scenario appear with the role indicated in the Case/Checklist/Scenario Name column as shown:



Add From Library Pop-up window:

Lists questions already in the Items Library *(questions need to be in Active status and applicable as an Assessment question).*

To add questions from Library:

1. Click the **Add From Library** button above the List box.

2. The **Add From Library** button will open a **Copy Question** pop-up window, where a directory of questions from the **Items Library, Checklist, and Cases** *(that have been designated as an SP Assessment or Learn Assessment Checklist Type in **Cases & Scenarios > Checklist**)* can be listed.

3. Click the **Type** checkboxes to populate the Question list from the Items Library, Checklists, and/or Cases areas.

4. Question search can be filtered by **Question Text, Response Type, Type, Category Name or Checklist Type** *(from the Items Library, other Checklists or other Cases)* by selecting the appropriate

drop-down menu next to the Search field. When searching by Checklists, an additional search term is added to the Search dropdown: Case/Checklist/Scenario Name.

5. Click the **Search** button; the list will change according to the new search criteria.

6. Click on the **checkbox** next to the question you want to add.

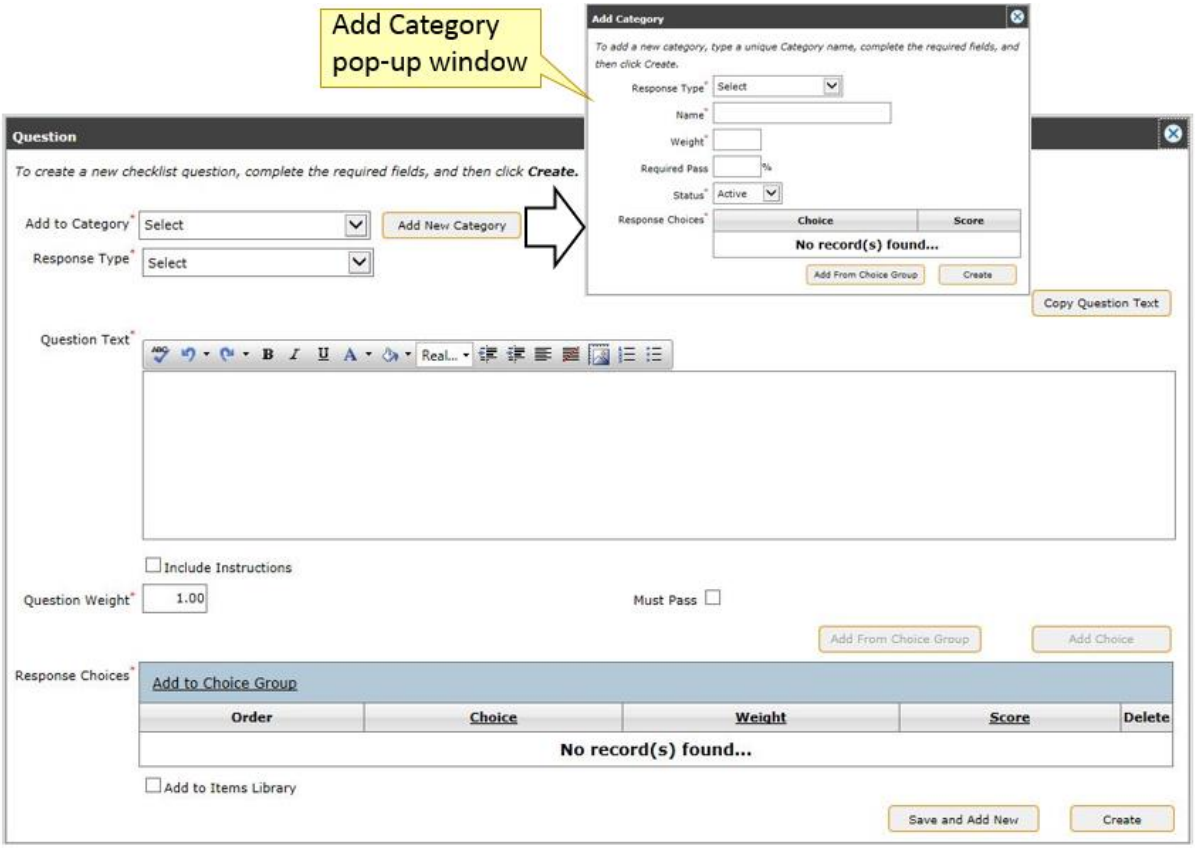
7. **Response Type** column indicates the type of answer response required for the question. This can be customized by clicking on the Question Text's hyperlink in the List box.

8. Click the **Add** button to add the question to the questionnaire.

[Back to Team Performance Assessment]

[Back to Performance Assessment]

Add New Question



Team Performance Question Pop-up Window:

► To create a **New Question**, click the **Add Question** button.

► Newly created questions can be added to the **Items Library** for future use.

Back to Team Performance Assessment

Back to Performance Assessment

Team Performance – Add Question

New questions can be created here *(This is the same as going to the Items Library > Questions > New).* They can also be added from here to the Items Library so they can be available for use in any case or scenario.

1. Click the **Add Question** button.

2. A **Question** window will pop up where you can specify the Category, Question, Grading Information, and Question Response Type.

3. **Add to Category** – Select a Category that is already in the Items Library > Categories database by selecting the drop-down menu and selecting one of the categories listed. When the Category is selected, the accompanying Response Type (type of answers required) will be listed. The response type can be changed within the category by using the **Customize** button. **Use Default Scoring** brings customized scoring to match the rest of the category.

4. **Add New Category** – Click the Add New Category button to define a new category.

5. **The Add New Category pop-up window:**

   Response Type – Select the type of response (*answer type*) from the drop-down menu *(i.e., a Yes/No answer, a Likert Scale of 1-9, True/False, etc. You may use keyword scoring for free-text type questions, though this is not required. Free-text style questions may be read and scored by a faculty evaluator. When selecting Text with Keywords, identify the keywords and misspellings in the keyword dictionary. Enable keyword scoring for the question and then associate the keywords).*

   Name – Type a name of the Category *(based on the subject matter of the questions that will be contained in the category, i.e., Communication Skills, Physical Exam, etc.).*

Weight – Enter the weight of this category. A question needs to be weighted for the choice to be counted in the scoring process. The default value is 1. This is used for calculating the weighted average mean score for the category, when multiple questions within a category are used. Questions within a category can be weighted differently, and Categories can be weighted differently than other categories. The system will adjust the score according to weight given. A weight of zero means the data can be collected but it won't count in the scoring process.

Required Pass % - *(Optional)* The minimum overall score that is needed for a student to pass the case. A zero in this box denotes that there are no minimum pass requirements for the case.

Status – Select the status of the question. Active means it is actively in the system and can be used in future cases and scenarios. Retired means inactive and ineligible for future use until made active again; this is a better alternative to deleting it, which would remove it permanently.

Response Choices – Click the hyperlink under the Choice column and define the answer choice that pertains to the Response Type that was selected (i.e., Low/Moderate/Severe; or Poor/Good/Excellent, etc.) by labeling the choice in the Choice text field (a maximum of 255 characters can be entered at the **Choice** field).

Score – Indicate the amount of credit received by selecting this choice.

Click **Save** to return to the Add Category window.

a. When the fields are complete, click the **Create** button.

b. A message window will pop up asking if you want to create additional categories; click **Yes** to add another question or click **No** to return to the Question window.

Back to the Question window:

6. If a new category was added in the previous step, it will be available in the drop-down menu.

   Select the **Category** for your question.

7. **Copy Question Text** button - When this button is selected, a **Copy Question Text** box will pop up allowing you to select a question from the list; the question text will now be copied and pasted into the **Question Text** box.

8. **Question Text** – Type the question in this field *(Option - Use the formatting mini toolbar to stylize your type).*

9. **Include Instructions** – Click this checkbox if you want the instructions to be visible to the evaluator.

10. **Question Weight** – Enter the question weight. A question needs to be weighted for the choice to be counted in the scoring process. The default value is 1.0. This is used for calculating the weighted average mean score for the category, when multiple questions within a category are used. Questions within a category can be weighted differently, and some categories can be weighted differently than other categories. The system will adjust the score according to weight given. A weight of zero means the data can be collected but it won't count in the scoring process.

11. **Must Pass** – Check this box if the correct response to this question is mandatory for the learner to pass the entire exercise. Checking this box will populate the Question Weight and Minimum Required percentage to pass fields. These are mandatory in order to specify the conditions to pass.

12. **Customize** – Clicking on this button will enable customization of the Response Choices and populate a **Reset to Default** button, an **Add From Choice Group** button and an **Add Choice** button:

    Reset to Default – Deletes the customization of the response choice and resets to default.

    Add From Choice Group – Allows you to add customized choice groups that are defined in the **Items Library > Choice Group** task. The list can be expanded by clicking on the + sign to reveal the choice details. Make selection by checking checkboxes and clicking the **Add** button *(Be sure to adjust the Response Type to match the total number of choices).*

    Add Choice – This will add an additional Choice in the Response Choices box. Clicking on this button will open a Choice pop-up window (a maximum of 255 characters can be entered at the **Choice** field). If the checkbox for **Score and Weight is Applicable** is checked, Score and Weight needs to be indicated. Click the **Update** button.

    Add to Choice Group – Click on this hyperlink to add your choices from the step above to the **Choice Group** database (***Items Library > Choice Group***) so it will be available for future use.

13. **Response Choices** – The order of the questions can be rearranged by selecting the numbers next to the questions.

14. **Limit Choices Required for Response** – When this is checked, the **Minimum Choices Required for Response** box and the **Maximum Choices Allowed** box will become available.

    Minimum Choices Required for Response - Set the minimum number of choices that can be selected.

    Maximum Choices Allowed – Set the maximum number of choices allowed to be selected.

15. **Score** – Based on the weight of each response choice, the Minimum score and the Maximum score are indicated. These can be changed by clicking on the Choice hyperlink and changing the score for each response or by checking Include Advanced Scoring Options.

16. **Include Advanced Scoring Options** – When this is checked, the Advanced Scoring Options box becomes available.

    a. Click the **Add Scoring Options** button to specify customized scoring for each choice to customize the Score, Weight and Criteria.

    b. When **Score and Weight is Applicable** is checked, enter the Score amount, Weight and Criteria for this choice by checking the choice checkbox, inputting the Score, Weight and Criteria.

    c. **Score** – Determine the amount of points credited for the correct answer. Check the correct choice and indicate that in the Score box. There may be multiple choices that are correct; if so, check those checkboxes and add the Score in the score box. Add the **Weight** in the weight box and then add the **Criteria** (*number of correct choices to receive the score*).

    d. **Criteria** – To specify the criteria for learner to pass this question, click the checkbox next to the choice(s) designated as the correct answer(s). Indicate the number of choices that are checked in the Criteria box.

       For example: If there are 3 choices and 2 are correct or are eligible to receive the amount of credit indicated by the Score, check those 2 choices, add the weight and the score for those choices and in the Criteria box, indicate 2.

    e. Click the **Add** button.

    f. Repeat for each choice by clicking on the **Add Scoring Options** button in the Response Choices box.

    g. Indicate the incorrect choice by selecting that choice's checkbox and adding 0 in the criteria box. Also put 0 in the Score box with a Weight of 1. A negative number can be indicated if points will be deducted for the incorrect choice.

    h. **Weight** must be at least 1 so the data is collected; the Weight is not the score.

    i. Click the **Save Changes** button.

17. **Add to Items Library** – Click this box to add question to the Items Library database. This will enable the question to be available for any SP case or scenario. Clicking on this checkbox will populate:

    Applicable Checklists – Team Performance or Learner Self-Assessment: select either or both of these if the question can also be applied to these checklists.

18. **Save and Add New** – Click this button if you want to save this question and add additional questions. If not, click **Create**.

To Delete a Question:

*Click the red **X** icon in the **Delete** column of the question to be deleted, or to delete the entire checklist, uncheck it in the Evaluation Summary section.*

To Edit a Question:

1. Click on the question name hyperlink.
2. The Question window will pop up.
3. Edit the question.
4. Click **Save Changes**.

Copy a Question:

Copy – Click the **copy icon** under the Copy column to make a copy of a question.

Back to Team Performance Assessment

Back to Performance Assessment

Learner Assessment – Scenario

► Use this section to create questions, a support file, and questionnaire to be made available to the learner before the SP encounter.

► When the assigned learner logs onto the portal, the checklist will be on their **Dashboard>To-Do** List.

► Use this section to define Pre-encounter, Post-encounter, Survey, and Learner Self-Assessment checklists to evaluate the learner.

► To specify the order by which the material will be delivered to the learner.

Learner Pre-Encounter

Questionnaire	Add Question	Support Files	Pre-Sim Study Documents	Display Options

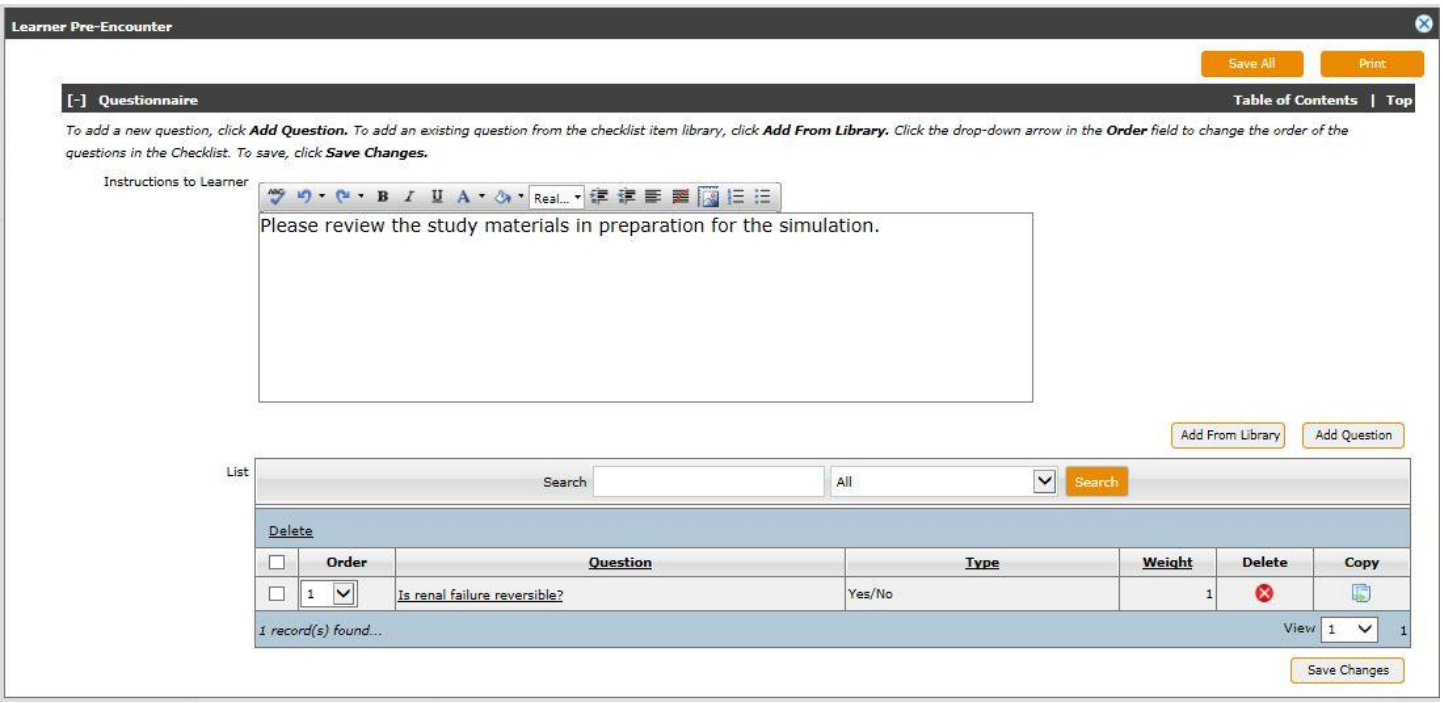
Learner Post-Encounter
Survey
Learner Self-Assessment

► Use this section to add Learner Pre-encounter questions, study documents, and Support files for the learner to access before the simulation event.

► This is not a mandatory component of the simulation, but does allow you the ability to define an activity for your learner prior to scenario activation. Documents and multimedia files may be uploaded here.

► The learner will access the Pre-Sim Study and Pre-encounter exercises by logging into the portal and selecting the Pre-encounter task function on their Dashboard To-Do List.

Questionnaire



Click on the Learner Pre-encounter hyperlink in the Learner Assessment section of the Activity Page.

The Learner Pre-encounter window will pop up where you can specify the scoring instructions to the evaluator, create a questionnaire, add support files, add the Pre-Sim Study, and design the format of the checklist items in Display Options.

Please enter the following information:

1. **Questionnaire Instructions for Scoring** - Type in any instructions pertaining to scoring for the evaluator in this text field. *(Optional - Use the formatting mini toolbar to stylize your type. This is not visible to the learner.)*

2. Add questions in the List box by either clicking the **Add From Library** button or create new questions by clicking the **Add Question** button*. (See detailed instructions to add new questions and Adding questions from the Library here.)*

3. Questions can be searched by **Question Text, Response Type, Type, or** Category Name by selecting the appropriate drop-down menu next to the **Search** field and then clicking the **Search** button.

4. **Rearrange Question Order** – When multiple questions are added to the List box, the order of the questions in the Checklist can be rearranged by clicking the drop-down arrow in the Order field and selecting the new chronological order.

5. To save, click **Save Changes**.

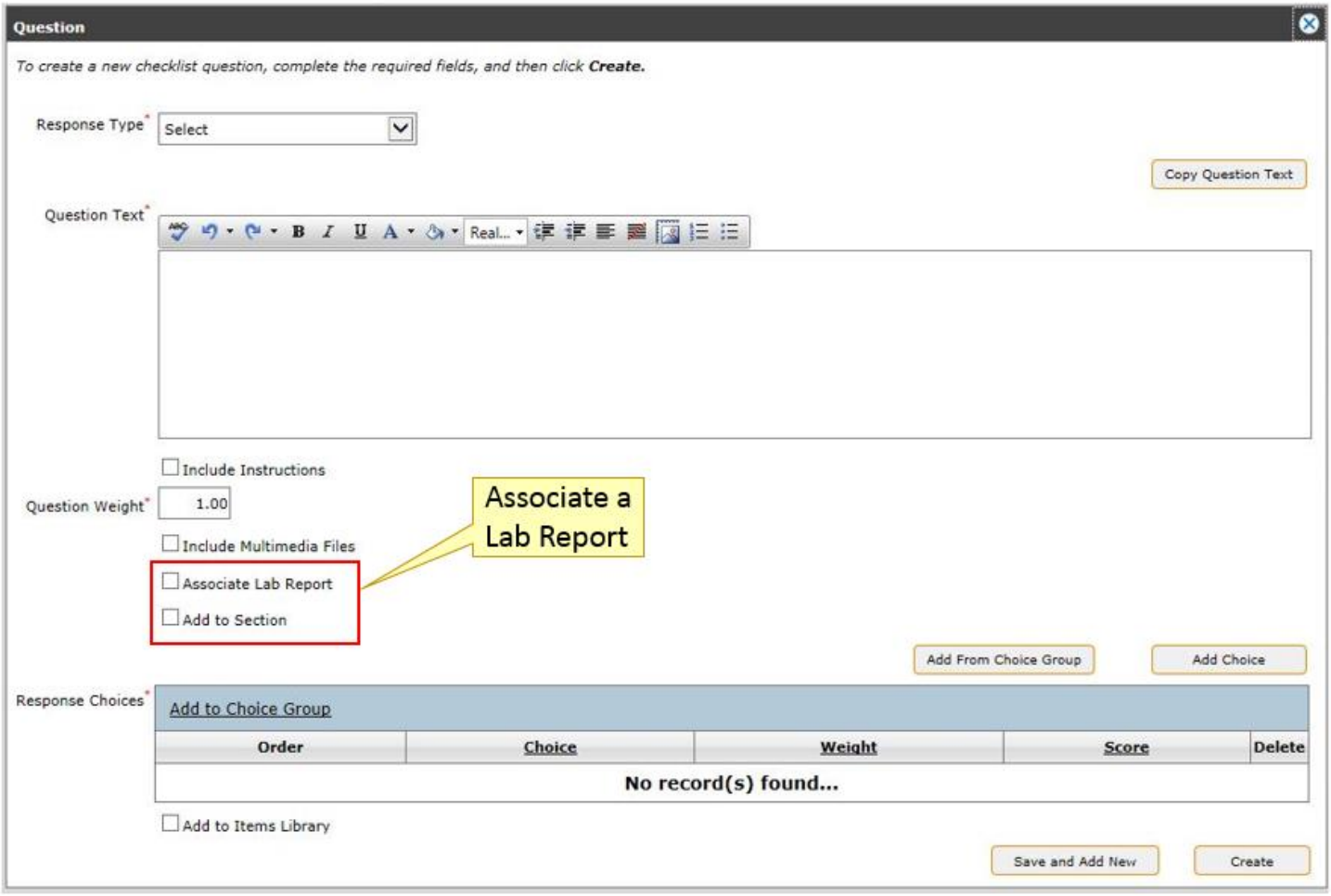
6. **Buttons at the top of window:**

   Save All – Saves all changes made in this window.

   Print - Information can be printed by selecting the **Print** button at the top right of window.

Back to Learner Pre-Encounter

Pre-Encounter – Add Question



New questions can be created here (This is the same as going to the *Items Library* > *Questions* > *New*) as well as more detailed specifications for the Pre-encounter exercises. They can also be added from here into the Items Library so they can be available for use in any case or scenario.

1. Click the **Add Question** button.

2. **Response Type** – Select the type of response (*answer type*) from the drop-down menu. *(i.e., a Yes/No answer, a Likert Scale of 1-9, True/False, etc. You may use keyword scoring for free-text type questions, though this is not required. Free-text style questions may be read and scored by a faculty evaluator. When selecting Text with Keywords, identify the keywords and misspellings in the keyword dictionary. Enable keyword scoring for the question and then associate the keywords.)*

3. **Copy Question Text** button - When this button is selected, a **Copy Question Text** box will pop up allowing you to select a question from the list; the question text will now be copied and pasted into the **Question Text** box.

4. **Question Text** – Type the question in this field *(Option - Use the formatting mini toolbar to stylize your type)*.

5. **Include Instructions** – Click this checkbox if you want the instructions to be visible to the learner.

6. **Question Weight** – Enter question weight. A question needs to be weighted for the choice to be counted in the scoring process. The default value is 1.0. This is used for calculating the weighted average mean score for the category, when multiple questions within a category are used. Questions within a category can be weighted differently, and some categories can be weighted differently than other categories. The system will adjust score according to weight given. A weight of zero means the data can be collected but it won't count in the scoring process.

7. **Add from Multimedia Library**:

   a. Click the **Add From Multimedia** button.

   b. Select from the list of multimedia files already in the Video database, or search for a particular file by file Name, title of case or scenario, file Type, or view files in a particular folder.

   c. Or, use the Search area to the right to search by Audio, Video, image or Word document or type in keywords.

   d. Click **Search**.

   e. Click the **checkbox** to left of the file name.

   f. Click the **Add** button.

   Only one file can be uploaded with a 2GB maximum file size.

8. Associate Lab Report – Check this checkbox if you want to associate a Lab Report file to be used with Lab Questions in the checklist.
   a. To associate a Lab Report to be used to answer lab questions, in the Response Type, select Lab Report in the drop-down menu.
   b. Type in Lab Question in the Question Text fiels.
   c. Click on the Add Choice and Lab button located above the Labs box.
   d. A Choice window will pop up. Enter the Lab file name in the Choice text field.
   e. Check Score and Weight is Applicable if you want to include a score and weight for this question.
   f. In the Lab Report File field, click the Browse button to navigate to the file you want to use for the Lab Report.
   g. Click the Upload button; the name of your file will appear.
   h. Click the Clear button if you want to delete the file.
   i. Click Update.
   j. Back in the Question window, your uploaded Lab Report File is listed in the Labs box.

k. Repeat if uploading additional files.

9. **Add to Section**- When this box is checked, select the Section drop-down menu to select a Section. If there are no Sections available in the dropdown, click on the Define Section button to create a section for the test.

   Define Section Title, Description or upload a supporting file (optional), and duration in minutes learner has to complete the section *if timer is enforced*. **Save Changes**.

   Sections are a means of assigning questions into similar topic divisions seen when the learner logs in to complete the questionnaire.

10. **Response Choices** – Click on the hyperlink under the Choice column to edit the answer choice that pertains to the Response Type that was selected, *(i.e., Low/Moderate/Severe; or Poor/Good/Excellent, etc.)*. Click **Save** after defining each Response Choice.

11. **Weight** – Enter the score weight of this category. A question needs to be weighted for the choice to be counted in the scoring process. The default value is 1.0. This is used for calculating the weighted average mean score for the category, when multiple questions within a category are used. Questions within a category can be weighted differently, and some categories can be weighted differently than other categories. The system will adjust score according to weight given. A weight of zero means the data can be collected but it won't count in the scoring process.

12. **Score** – Determine the amount of credit the question will be worth and indicate it in the Score box.

13. **Add From Choice Group** – Add customized choice groups that are defined from the **Items Library > Choice Group** task.

    Add Choice – This will add an additional Choice in the Response Choices box. Clicking this button will open a Choice pop-up window where the additional Choice label, Score and Weight can be entered (a maximum of 255 characters can be entered at the **Choice** field). Click on the expand box of the type of choice you want to add, and then click **Add** to return to the Question window. *(Be sure to adjust the Response Type to match the total number of choices).*

    Add to Choice Group – Click on this hyperlink to add your choices from the step above to the **Choice Group** database (***Items Library > Choice Group***) so it will be available for future use.

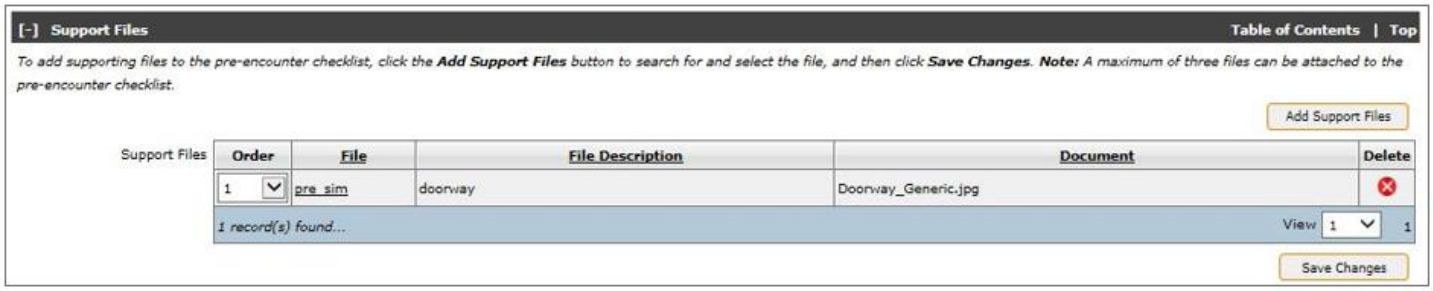
    Response Choices – The order of the questions can be rearranged by selecting the numbers next to the questions.

14. **Add to Items Library** – Clicking this checkbox will add this question to the **Items Library > Questions** database. Specify if you also want to apply it to a Learner Post-encounter and/or Survey checklist question. By checking these options, they will be searchable under those criteria.

15. **Save and Add New** – Click this button if you want to save this question and add additional questions. If not, click **Create**.

Back to Learner Pre-Encounter

Support Files



► Documents, images or multimedia files used to support the Pre-encounter checklist items (optional).

► For a support file to be available to the learner, at least one question needs to be added to the questionnaire.

1. To add optional supporting files to the pre-encounter checklist, click the **Add Support Files** button to search for and select the file.
2. A **Support Files** window will pop up.
3. Type a Filename in the **File** text field.
4. Type a description of the file in **File Description**.
5. **Save Changes.**

   Note: A maximum of three files can be attached to the pre-encounter checklist.

Upload a file:

1. Click the **Browse** button.
2. Navigate to the file name to be uploaded; click the **Open** button.
3. Click the **Upload** button.
4. The name of your file should be listed.
5. To delete the uploaded file, click on the name of the file and click on the **Clear** button. Repeat prior steps to upload a different file.
6. Click the **Update** button.

To view uploaded file:

1. Click the filename hyperlink of the file just uploaded.

2. The File Viewer window will pop up.
3. If this is a document (.doc, .docx, .xls, xlsx, .pdf, .ppt, .pptx, .txt) and you are unable to preview it, then click the link to download the file. If this is an image (.bmp, .jpg, .jpeg, .GIF, .TIFF, .PNG), then use the controls (+/-) below the Image to zoom in or zoom out.

Delete a Listing:

1. In the Learner Pre-encounter window, locate the question to be deleted.
2. Click the **X** in the Delete column to delete a listing.

To Edit a question:

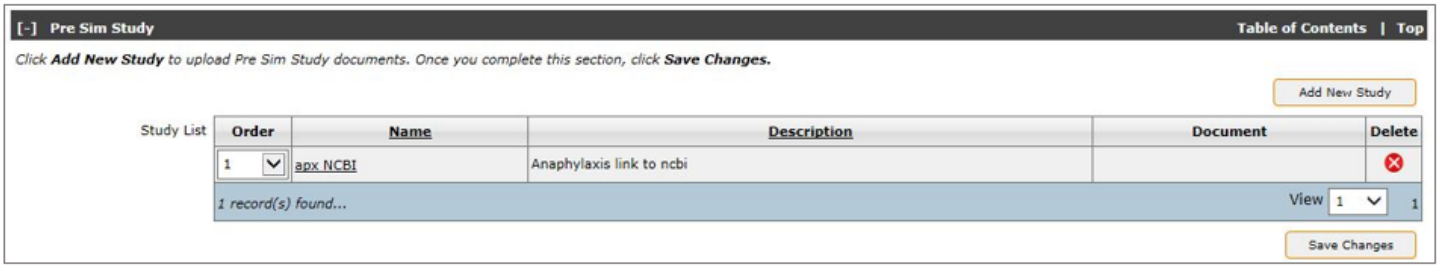
1. Click on the question name hyperlink.
2. The Question window will pop up.
3. Edit question.
4. Click **Save Changes**.

Copy a Listing:

Click the **copy icon** under the Copy column to make a copy of a question *(This is a good idea if you want the same set of questions listed in an existing checklist and maybe want to edit the title or content without changing the original question).*

Back to Learner Pre-Encounter

Pre-Sim Study Documents



The amount of time that study materials will be available for learners to review is specified in the Scenario Information section at the top of the Activity Page.

1. In the Pre Sim Study List box, click the Add New Study button.
2. The Pre-Sim Study window will pop up.
3. Type a Filename in the File text field.
4. Type a description of the file in **File Description**.
5. Click the **Add Web Link** button to add a web address to be used for a Pre-Sim exercise (optional).
   a. A **Web Link** window will pop up.
   b. In the Web Link text field, after http:// type the web address *(when learners click on this link, the webpage will load on a new web page)*.
   c. Click the **Add button**.

Upload a file:

1. Click the **Browse** button.
2. Navigate to the file name to be uploaded, click the Open button.
3. Click the **Upload** button.
4. The name of your file appears.
5. To delete the uploaded file, click on the name of the file, click on the **Clear** button. Repeat step 4 to upload different file.
6. Click the **Update** button.

To view uploaded file:

1. Click the **filename** hyperlink of the file just uploaded.
2. The **Pre-Sim Study** window will pop up listing the document uploaded as well as the web link. Click on the **Document Name** hyperlink to view the document.
3. The **File Viewer** window will pop up.
4. If this is a document (.doc, .docx, .xls, xlsx, .pdf, .ppt, .pptx, .txt) and you are unable to preview it, then click the link to download the file. If this is an image (.bmp, .jpg, .jpeg, .GIF, .TIFF, .PNG), then use the controls (+/-) below the Image to zoom in or zoom out.

Delete a Listing:

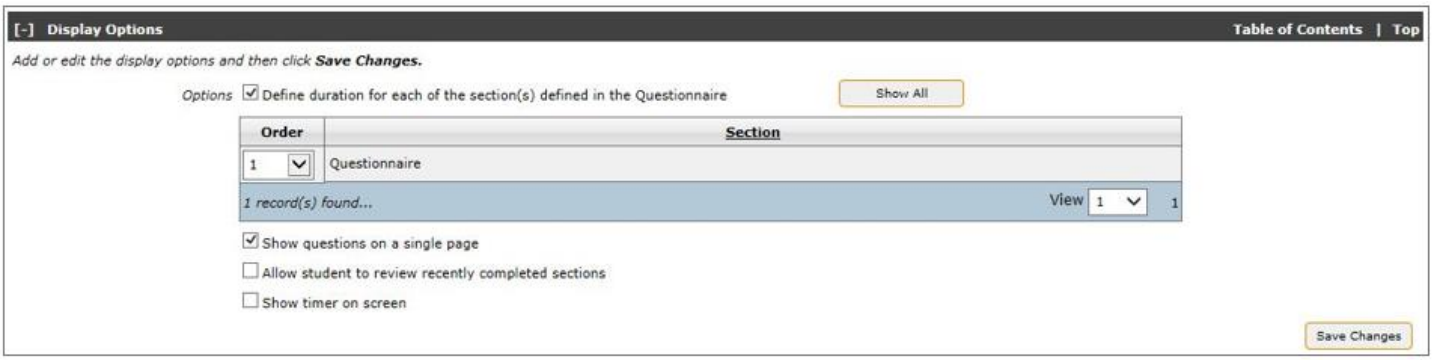
Click the **X** in the Delete column to delete a listing.

Copy a Listing:

Click the **Copy icon** under the Copy column to make a copy of a checklist question.

Back to Learner Pre-Encounter

Display Options



► Define the options for how the checklist will be displayed.

1. **Define Duration for Each of the Section(s) Defined in Questionnaire** – When this box is checked, the Question order can be rearranged.
2. **Rearrange Question Order** – When multiple items (Questionnaire, Study Documents) are added to the section above, the order can be rearranged by clicking the drop-down arrow in the **Order** field and selecting the new chronological order.
3. **Show questions on a single page** – When this box is checked, all the questions will appear on one page. If unchecked, each question will be on its own page.
4. **Allow student to review recently completed Post-encounter sections** – This is available when **Show questions on a single page** is selected. This allows learner to navigate back to a previous section of the Checklist.
5. **Show Section Name(s) as Headers** – When this box is checked, the Section Names that were defined in the Add Question window will be displayed as Section Headers.

6. **Show Timer on Screen** – A timer will be visible allowing learner to see how much time is left to complete the Pre-Encounter exercises. When the timer expires, that section of the test ends and the next section is presented until the completion of checklist.

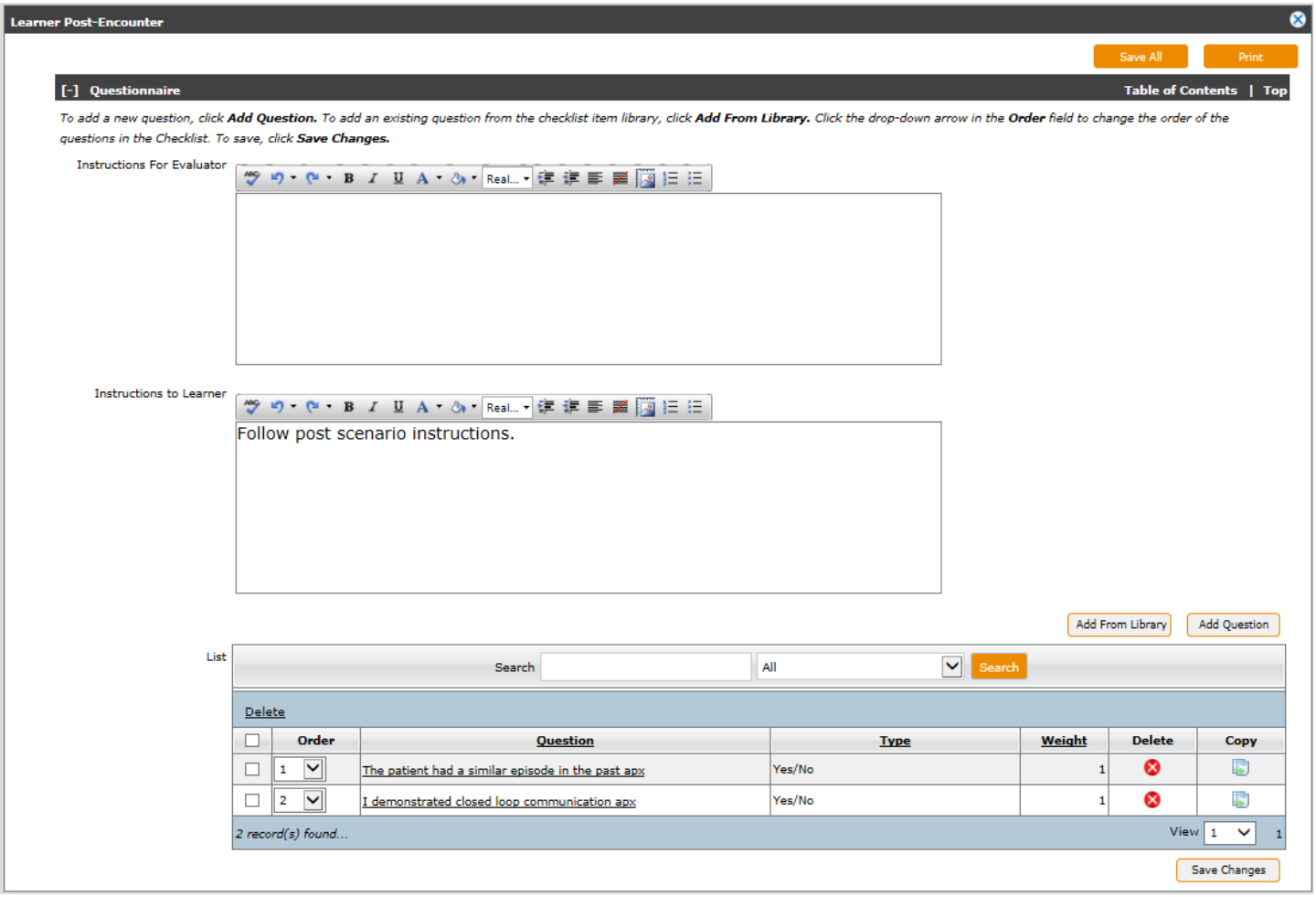
7. **Save Changes**.

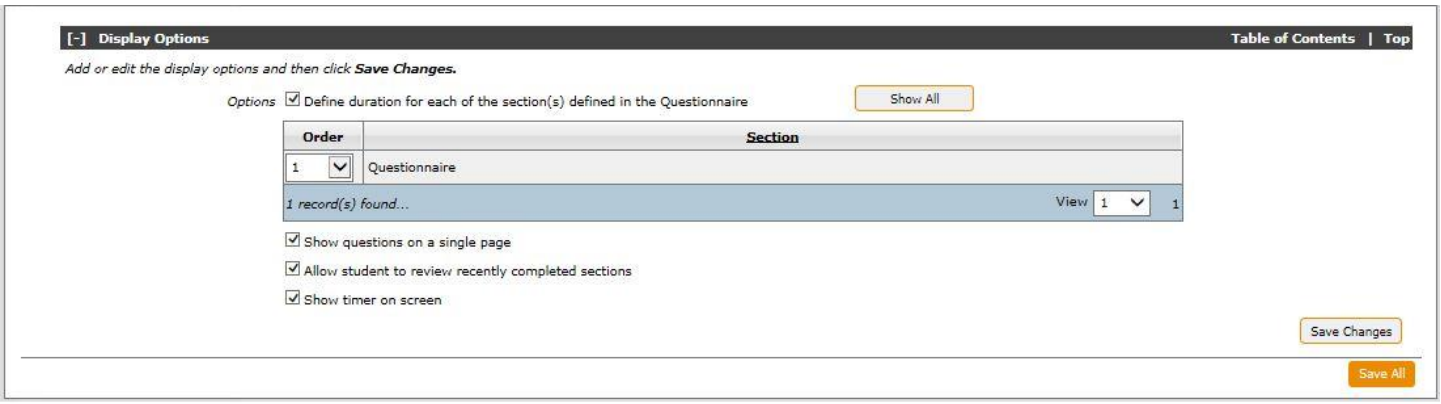
Back to Learner Pre-Encounter

Learner Post-Encounter

Questionnaire	Display Options	Add From Library	Add Question

Learner Pre-Encounter
Survey
Learner Self-Assessment





Note: Instructions for Evaluator and Instructions for Learner text boxes were reduced in size for illustration.

► Post-encounter questions are checklist items which are graded and may be presented to the learner after the scenario(availability is subject to the time indicated in the Scenario Information section, at the top of the page).

► Checklists are applied to a case or scenario by attaching them in to the Learner Assessment section of that case or scenario's Activity Page. Then, the person filling out the Checklist will have it on their To-Do List when they log in.

► Use this section to define the Post-encounter checklists for the learner to access after the simulation event.

► The learner will access the Post-encounter exercises on their Dashboard To-Do List.

► This specifies the order by which the material will be delivered to the learner.

Back to Learner Pre-Encounter

Back to Learner Post-Encounter

Questionnaire

Learner Post-encounter pop-up window:

1. Click the Post encounter Questionnaire hyperlink in the Evaluation Summary section of the Activity Page.

2. **Questionnaire Instructions for Scoring** - Type in any instructions pertaining to scoring for the evaluator or the learner in the related text field. *(Optional - Use the formatting mini toolbar to stylize your type. The evaluator instructions are not visible to the learner.)*

3. Add questions in the List box by either clicking the **Add From Library** button or create new questions by clicking the **Add Question** button. *(See detailed instructions to add new questions and Adding questions from the Library here.)*

4. Questions can be searched by **Question Text, Response Type, Type, or Category Name** by selecting the appropriate drop-down menu next to the **Search** field and then clicking the **Search** button.

5. **Rearrange Question Order** – When multiple questions are added to the List box, the order of the questions in the Checklist can be rearranged by clicking the drop-down arrow in the Order field and selecting the new chronological order.

6. To save, click **Save Changes**.

7. **Buttons at the top of window**:

   Save All – Saves all changes made in this window.

   Print - Window can be printed by selecting the **Print** button at the top right of window.

Delete a Listing:

1. In the Learner Pre-encounter window, locate the file to be deleted.

2. Click the **X** in the Delete column to delete a listing.

To Edit a question:

1. Click on the question name hyperlink.

2. The Question window will pop up.

3. Edit the question.

4. Click **Save Changes**.

Copy a Listing:

Copy – Click the **copy icon** under the Copy column to make a copy of a checklist item (this is a good idea if you want the same set of questions listed in an existing checklist and maybe want to edit the title or content without changing to the original question.)

Back to Learner Pre-Encounter

Back to Learner Post-Encounter

Display Options

► Define the options of how the checklist will be displayed to the learner.

1. **Define Duration for Each of the Section(s) Defined in Questionnaire** – When this box is checked, the Question order can be rearranged.

2. **Rearrange Question Order** – When multiple items (Questionnaire, Study Documents) are added to the section above, the order can be rearranged by clicking the drop-down arrow in the Order field and selecting the new chronological order.

3. **Show questions on a single page** – When this box is checked, all the questions will appear on one page. If unchecked, each question will be on its own page.

4. **Allow student to review recently completed Post-encounter sections** – Check this box to allow the learner to go back to prior questions or sections within the post encounter. *If a question within the post encounter will aid in answering another question within the post-encounter, allowing the learner to review prior questions would not be advisable*.

5. **Show Section Name(s) as Headers** – When this box is checked, the Section Names that were defined in the Add Question window will be displayed as Section Headers.

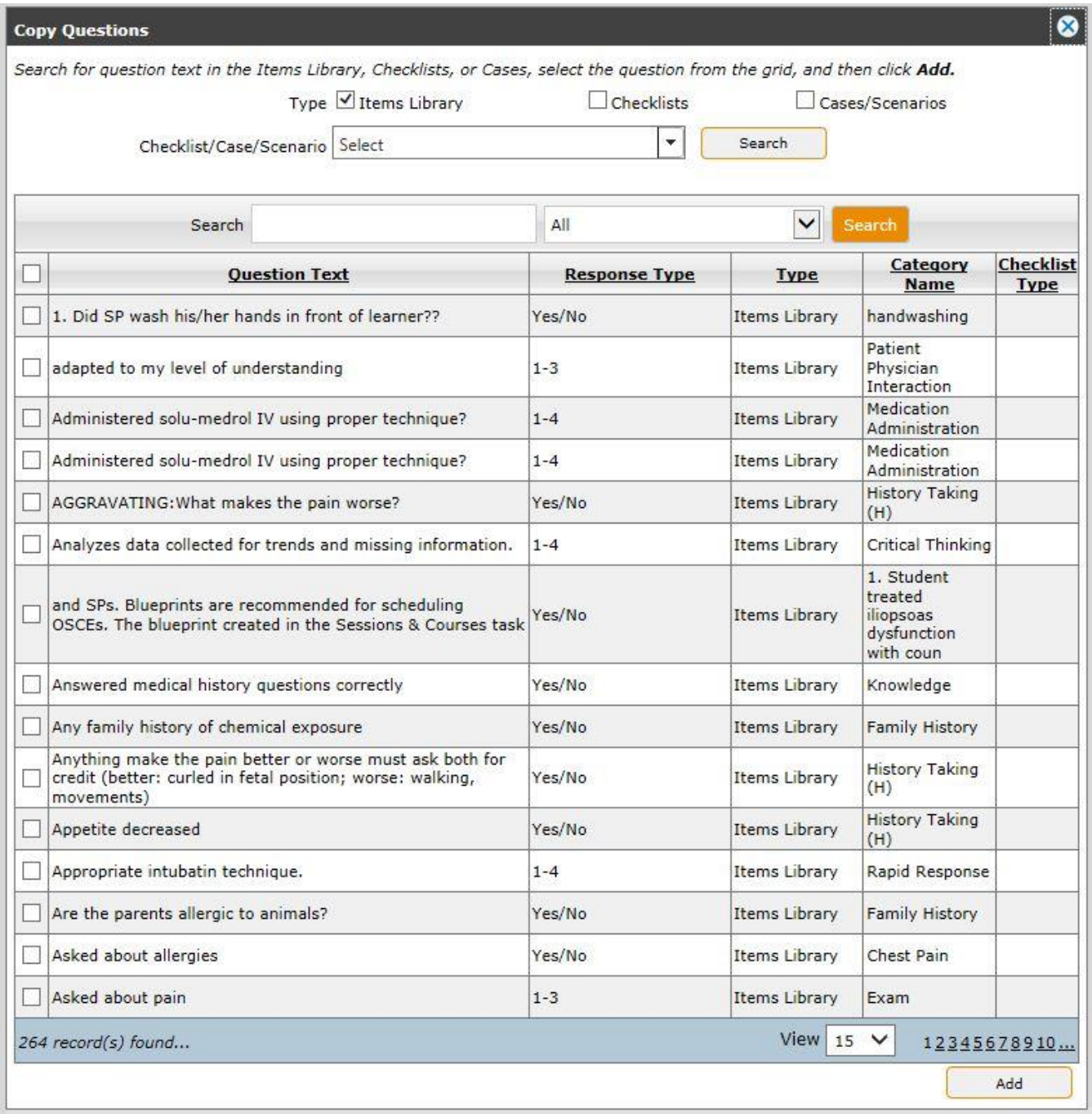
6. **Show Timer on Screen** – A timer will be visible allowing learner to see how much time is left to complete the Pre-encounter exercises. When the timer expires, that section of the test ends and the next section is presented until the completion of checklist.

7. **Save Changes**.

Back to Learner Pre-Encounter

Back to Learner Post-Encounter

Post-Encounter – Add From Library



Copy Questions

*Search for question text in the Items Library, Checklists, or Cases, select the question from the grid, and then click **Add.***

Type ☑ Items Library ☐ Checklists ☐ Cases/Scenarios

Checklist/Case/Scenario Select Search

Search All Search

	Question Text	Response Type	Type	Category Name	Checklist Type
☐	1. Did SP wash his/her hands in front of learner??	Yes/No	Items Library	handwashing	
☐	adapted to my level of understanding	1-3	Items Library	Patient Physician Interaction	
☐	Administered solu-medrol IV using proper technique?	1-4	Items Library	Medication Administration	
☐	Administered solu-medrol IV using proper technique?	1-4	Items Library	Medication Administration	
☐	AGGRAVATING:What makes the pain worse?	Yes/No	Items Library	History Taking (H)	
☐	Analyzes data collected for trends and missing information.	1-4	Items Library	Critical Thinking	
☐	and SPs. Blueprints are recommended for scheduling OSCEs. The blueprint created in the Sessions & Courses task	Yes/No	Items Library	1. Student treated iliopsoas dysfunction with coun	
☐	Answered medical history questions correctly	Yes/No	Items Library	Knowledge	
☐	Any family history of chemical exposure	Yes/No	Items Library	Family History	
☐	Anything make the pain better or worse must ask both for credit (better: curled in fetal position; worse: walking, movements)	Yes/No	Items Library	History Taking (H)	
☐	Appetite decreased	Yes/No	Items Library	History Taking (H)	
☐	Appropriate intubatin technique.	1-4	Items Library	Rapid Response	
☐	Are the parents allergic to animals?	Yes/No	Items Library	Family History	
☐	Asked about allergies	Yes/No	Items Library	Chest Pain	
☐	Asked about pain	1-3	Items Library	Exam	

264 record(s) found... View 15 1 2 3 4 5 6 7 8 9 10 ...

Add

Add from Library pop-up window:

Lists questions already in the Items Library (Questions need to be in Active status and applicable as an Assessment question).

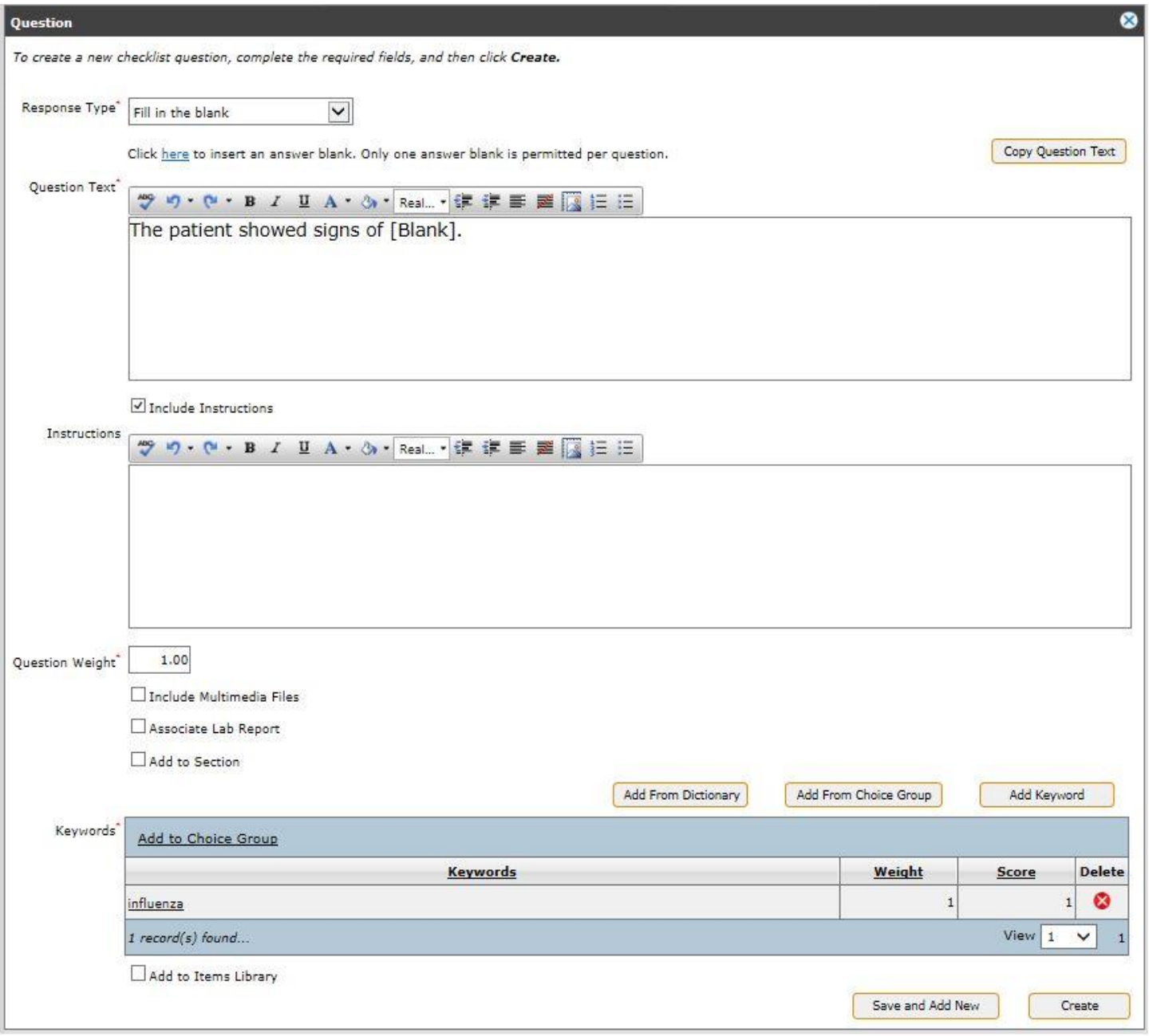
To add questions from Library:

1. Click the **Add From Library** button above the List box.
2. The **Add From Library** button will open a **Copy Question** pop-up window, where a directory of questions from the **Items Library, Checklist, and Cases** *(that have been designated as a Team Assessment or Learner Assessment Checklist Type in* ***Cases & Scenarios > Checklist****)* can be listed.
3. Click the **Type** checkboxes to populate the Question list from the Items Library, Checklists, and/or Cases areas.
4. Question search can be filtered by **Question Text, Response Type, Type, or Category Name** *(from the Items Library, other Checklists or other Cases)* by selecting the appropriate drop-down menu next to the **Search** field.
5. Click the **Search** button; the list will change according to the new search criteria.
6. Click on the **checkbox** next to the question you want to add.
7. **Response Type** column indicates the type of answer response required for the question. This can be customized by clicking on the Question Text's hyperlink in the List box.
8. Click the **Add** button to add the question to the questionnaire.

Back to Learner Pre-Encounter

Back to Learner Post-Encounter

Post-Encounter – Add Question



New questions can be created here (*This is the same as going to the Items Library > Questions > New*) as well as more detailed specifications for the Post-encounter exercises. They can also be added from here into the Items Library so they can be available for use in any case or scenario.

1. Click the **Add Question** button.

2. **Response Type** – Select the type of response (*answer type*) from the drop-down menu. *(i.e., a Yes/No answer, a Likert Scale of 1-9, True/False, etc. You may use keyword scoring for free-text type questions, though this is not required. Free-text style questions may be read and scored by a faculty evaluator. When selecting Text with Keywords, identify the keywords and misspellings in the*

keyword dictionary. Enable keyword scoring for the question and then associate the keywords).)

3. **Copy Question Text** button - When this button is selected, a **Copy Question Text** box will pop up allowing you to select a question from the list; the question text will now be copied and pasted into the **Question Text** box.

4. **Question Text** – Type the question in this field. *(Option - Use the formatting mini toolbar to stylize your type).*

5. **Include Instructions** – Click this checkbox if you want the instructions to be visible to the learner.

6. **Question Weight** – Enter question weight. A question needs to be weighted for the choice to be counted in the scoring process. The default value is 1.0. This is used for calculating the weighted average mean score for the category, when multiple questions within a category are used. Questions within a category can be weighted differently, and some categories can be weighted differently than other categories. The system will adjust score according to weight given. A weight of zero means the data can be collected but it won't count in the scoring process.

7. **Add from Multimedia Library**:

   a. Click the **Add From Multimedia** button.

   b. Select from the list of multimedia files already in the Video database, or search for a particular file by file Name, title of case or scenario, file Type, or view files in a particular folder.

   c. Or, use the Search area to the right to search by Audio, Video, image or Word document or type in keywords.

   d. Click **Search**.

   e. Click the **checkbox** to left of the file name.

   f. Click the **Add** button.

   Only one file can be uploaded with a 2GB maximum file size.

8. **Associate Lab Report** – Check this checkbox if you want to associate a Lab Report file to be used with Lab Questions in the checklist.

   a. To associate a **Lab Report** to be used to answer lab questions, in the Response Type, select **Lab Report** in the drop-down menu.

   b. **Type in Lab Question in the Question Text field**.

   c. Click on the **Add Labs** button located above the Labs box.

   d. A **Choice** window will pop up. Enter the Lab file name in the Choice text field.

   e. **Check Score and Weight is Applicable** if you want to include a score and weight for this question.

f. In the Lab Report File field, click the browse button to navigate to the file you want to use for the Lab Report. When the file is located, click **Open**.

g. Click the **Upload** button; the name of your file will appear.

h. Click the **Clear** button if you want to delete the file.

i. Click **Update**.

j. Back in the Question window, your uploaded Lab Report File is listed in the Labs box.

k. Repeat if uploading additional files

9. **Response Choices** – The order of the questions can be rearranged by selecting the numbers next to the questions.

10. **Limit Choices Required for Response** – When this is checked, the Minimum Choices Required for Response box and the Maximum Choices Allowed box will become available.

11. **Minimum Choices Required for Response** - Set the minimum number of choices that can be selected.

12. **Maximum Choices Allowed** – Set the maximum number of choices allowed to be selected.

13. **Add to Section**- When this box is checked, select the Section drop-down menu to select a Section. If there are no Sections available in the dropdown, click on the Define Section button to create a section for the test.

    Define Section Title, Description, upload a supporting file (optional), and Duration in minutes learner has to complete the section *(timer will be enforced if specified in Settings > Parameters*).

    Sections are a means of assigning questions into similar topic divisions seen when the learner logs in to complete the questionnaire.

14. **Add to Items Library** – Clicking this checkbox will add this question to the **Items Library > Questions** database. Specify if you also want to apply it to a Learner Post-encounter and/or Survey checklist question. By checking these options, they will be searchable under those criteria.

15. **Save Changes**.

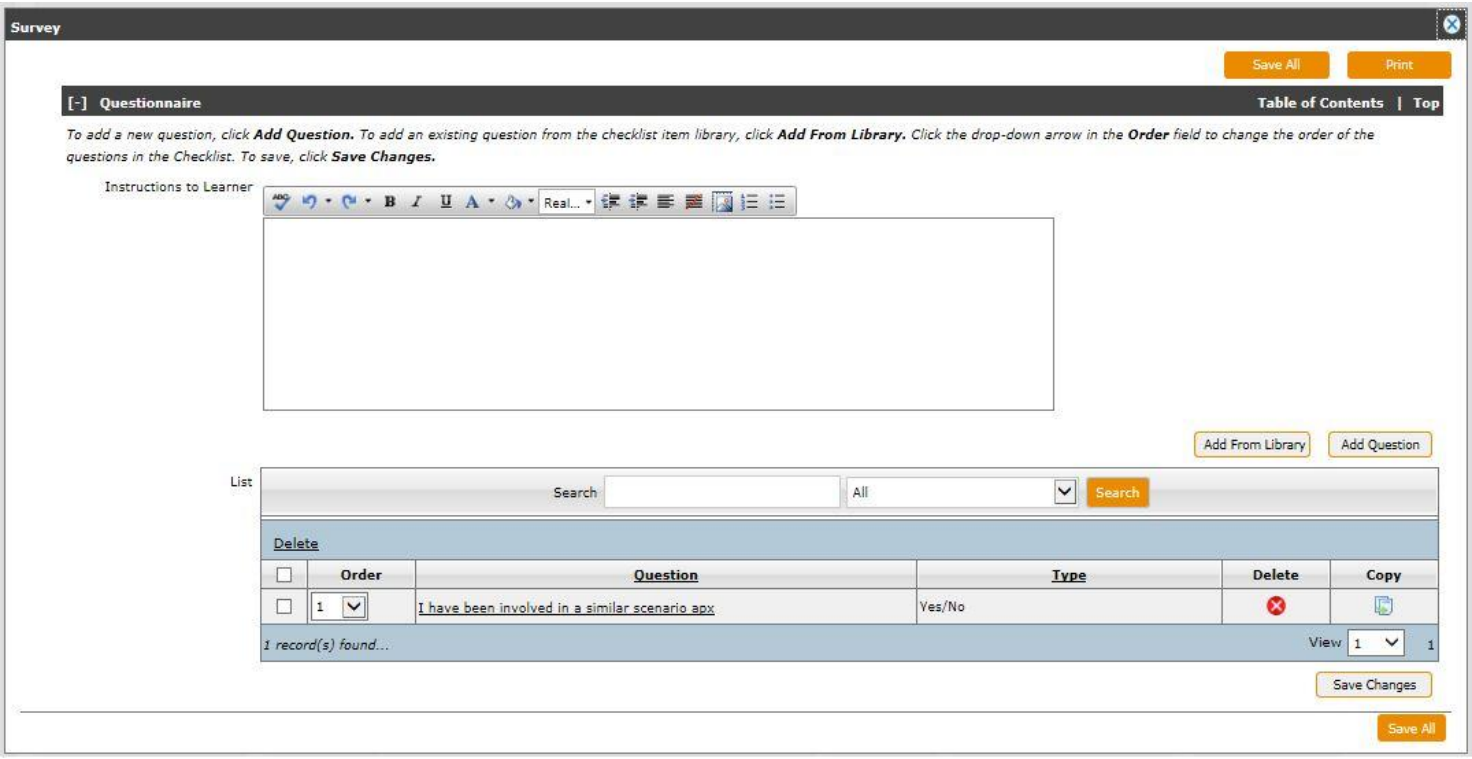
Back to Learner Pre-Encounter

Back to Learner Post-Encounter

Survey

Survey Questions – Add From Library	Add Question

Learner Pre-Encounter
Learner Post-Encounter
Learner Self-Assessment



► The Survey attached here will be part of the post-encounter assessment. (For standalone surveys, independent of a case/scenario session, see the Session Calendar>Schedule Survey task).

► Learners may be asked to survey questions after each case that they complete during the course of a session or OSCE.

► An after-session-level survey can be specified at the time of scheduling the session.

► Survey questions may be in the form of Yes/No, Text, Choice or Multiple Choice. Survey questions are entered the same way as Post-encounter items, and scoring of these items is optional.

► Dichotomous questions tend to provide the best results and the information obtained can be used to compare the student's response with the student's performance.

To add a Survey to be presented to a learner after an encounter or session, click the Survey hyperlink under the Learner Assessment section of the Activity Page.

Survey pop-up window:

1. **Questionnaire Instructions** - Type in any instructions for the learner in this text field *(Optional - Use the formatting mini toolbar to stylize your type*.

2. Add questions in the List box by either clicking the **Add From Library** button or create new questions by clicking the **Add Question** button. *(See detailed instructions to add new questions and Adding questions from here.)*

3. Questions can be searched by **Question Text, Response Type, Type, or** Category Name by selecting the appropriate drop-down menu next to the **Search** field and then clicking the **Search** button.

4. **Rearrange Question Order** – When multiple questions are added to the List box, the order of the questions in the Checklist can be rearranged by clicking the drop-down arrow in the Order field and selecting the new chronological order.

5. To save, click **Save Changes**.

6. Buttons at the top of window:

   Save All – Saves all changes made in this window.

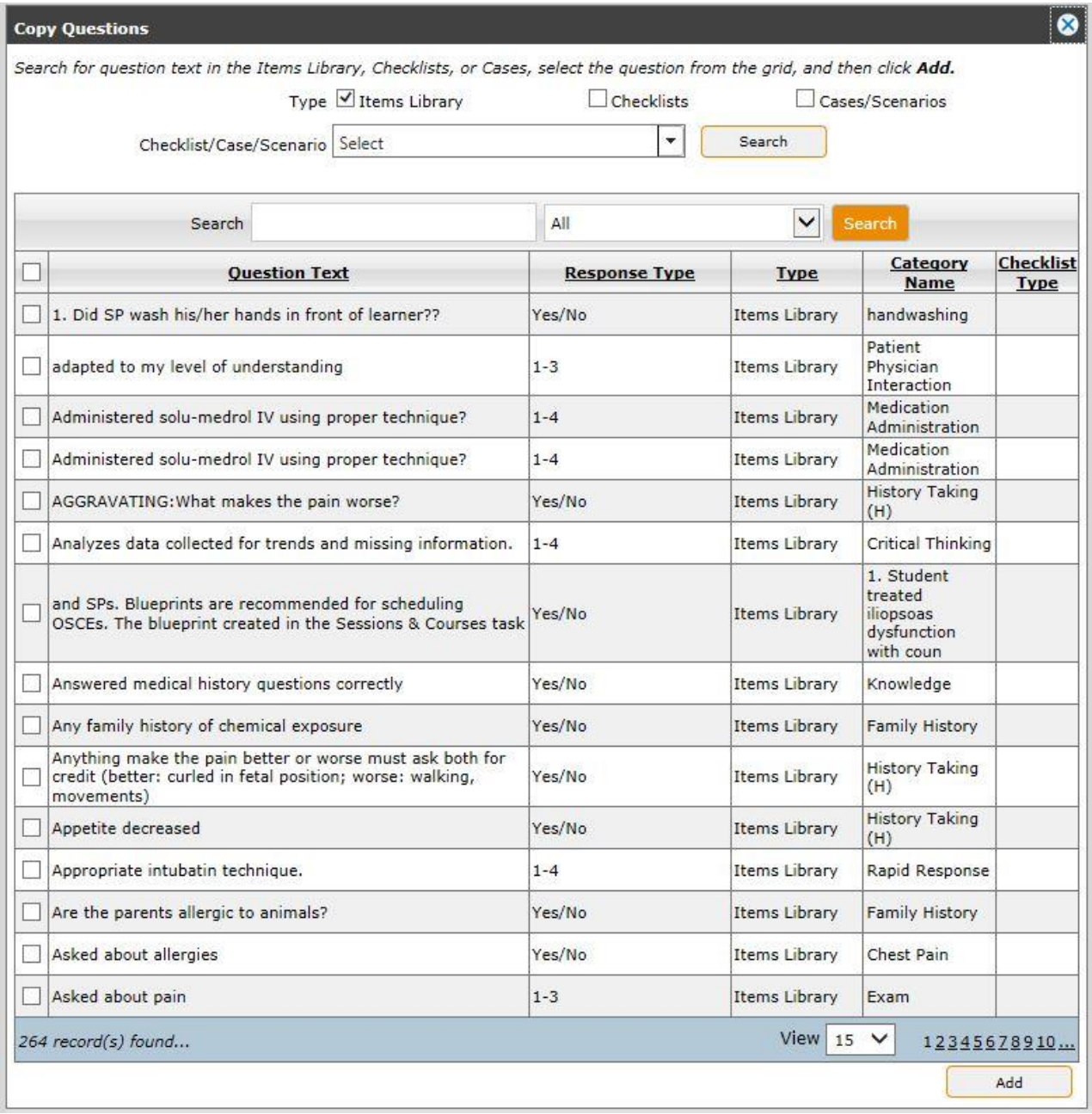
   Print - Information can be printed by selecting the **Print** button at the top right of window.

Back to Learner Pre-Encounter

Back to Learner Post-Encounter

Back to Survey

Survey Questions – Add From Library



Question Text	Response Type	Type	Category Name	Checklist Type
1. Did SP wash his/her hands in front of learner??	Yes/No	Items Library	handwashing	
adapted to my level of understanding	1-3	Items Library	Patient Physician Interaction	
Administered solu-medrol IV using proper technique?	1-4	Items Library	Medication Administration	
Administered solu-medrol IV using proper technique?	1-4	Items Library	Medication Administration	
AGGRAVATING:What makes the pain worse?	Yes/No	Items Library	History Taking (H)	
Analyzes data collected for trends and missing information.	1-4	Items Library	Critical Thinking	
and SPs. Blueprints are recommended for scheduling OSCEs. The blueprint created in the Sessions & Courses task	Yes/No	Items Library	1. Student treated iliopsoas dysfunction with coun	
Answered medical history questions correctly	Yes/No	Items Library	Knowledge	
Any family history of chemical exposure	Yes/No	Items Library	Family History	
Anything make the pain better or worse must ask both for credit (better: curled in fetal position; worse: walking, movements)	Yes/No	Items Library	History Taking (H)	
Appetite decreased	Yes/No	Items Library	History Taking (H)	
Appropriate intubatin technique.	1-4	Items Library	Rapid Response	
Are the parents allergic to animals?	Yes/No	Items Library	Family History	
Asked about allergies	Yes/No	Items Library	Chest Pain	
Asked about pain	1-3	Items Library	Exam	

Add from Library Pop-up window:

► Lists Questions already in the Items Library (questions need to be in Active status and applicable as a Survey question).

► Data from Surveys are collected, though not scored.

► If a Learner Survey checklist is attached, the system will automatically send the Survey to the Learner after the encounter.

► An after-Session Survey can be assigned to a learner when scheduling a session through the Session Calendar Activity Page.

To add questions from Library:

Click the Survey link under the Learner Assessment section of the Activity Page.

1. Click the **Add From Library** button above the List box.

2. The **Add From Library** button will open a **Copy Question** pop-up window, where a directory of questions from the **Items Library, Checklist, and Cases** *(that have been designated as an SP Assessment or Learn Assessment Checklist Type in **Cases & Scenarios > Checklist**)* can be listed.

3. Click the **Type** checkboxes to populate the Question list from the Items Library, Checklists, and/or Cases areas.

4. Question search can be filtered by **Question Text, Response Type or Type** *(from the Items Library, other Checklists or other Cases)*, by selecting the appropriate drop-down menu next to the **Search** field.

5. Click the **Search** button; the list will change according to the new search criteria.

6. Click on the **checkbox** next to the question you want to add.

7. **Response Type** column indicates the type of answer response required for the question. This can be customized by clicking on the Question Text's hyperlink in the List box.

8. Click the **Add** button to add the question to the questionnaire.

Back to Learner Pre-Encounter

Back to Learner Post-Encounter

Back to Survey

Survey – Add Question

New questions can be created here *(This is the same as going to the Items Library > Questions > New)* as well as more detailed specifications for the Survey. They can also be added from here into the Items Library so they can be available for use in any case or scenario.

1. Click the **Add Question** button.

2. **Response Type** – Select the type of response (*answer type*) from the drop-down menu. *(i.e., a Yes/No answer, a Likert Scale of 1-9, True/False, etc. You may use keyword scoring for free-text type questions, though this is not required. Free-text style questions may be read and scored by a faculty evaluator. When selecting Text with Keywords, identify the keywords and misspellings in the keyword dictionary. Enable keyword scoring for the question and then associate the keywords).*

3. **Copy Question Text button** - When this button is selected, a **Copy Question Text** box will pop up allowing you to select a question from the list; the question text will now be copied and pasted into the **Question Text** box.

4. **Question Text** – Type the question in this field. *(Option - Use the formatting mini toolbar to stylize your type)*.

5. **Include Instructions for Learner** – Click this checkbox if you want the instructions to be visible to the learner.

6. **Add From Choice Group** – Add customized choice groups that are defined from **Items Library > Choice Group** task.

   Add Choice – This will add an additional Choice in the Response Choices box. Clicking on this button will open a Choice pop-up window where the additional Choice label, Score and Weight can be entered (a maximum of 255 characters can be entered at the **Choice** field). Click on the expand box of the type of choice you want to add, and then click **Add** to return to the Question window. *(Be sure to adjust the Response Type to match the total number of choices.)*

   Add to Choice Group – Click on this hyperlink to add your choices from the step above to the **Choice Group** database (***Items Library > Choice Group***) so it will be available for future use.

Response Choices – The order of the questions can be rearranged by selecting the numbers next to the questions.

7. **Add to Items Library** – Clicking this checkbox will add this question to the **Items Library > Questions** database. Specify if you also want to apply it to a Learner Post-encounter and/or Survey checklist question. By checking these options, they will be searchable under those criteria.

8. **Is Survey Question Optional** – Check if answering this survey question is not required.

9. **Save and Add New** – Click this button if you want to save this question and add additional questions. If not, click **Create**.

10. **Buttons at the top of window**:

    Preview button to print preview checklist.

    Save All – Saves all changes made in this window.

    Print - Information can be printed by selecting the **Print** button at the top right of window.

Back to Learner Pre-Encounter

Back to Learner Post-Encounter

Back to Survey

Learner Self-Assessment

Questionnaire	Add From Library	Add Question

Learner Pre-Encounter
Learner Post-Encounter
Survey

► Learner Self-Assessment questions are checklist items for the learner to assess their own performance.

► The evaluator will receive a link on their dashboard's To Do list to complete the evaluation.

► The Learner Self-Assessment questions are created in the same way as the Performance Assessments.

► These questions will also be the ones used if assigning a Peer Evaluation when the Scenario is scheduled.

► Learner Self-Assessments are delivered to the learner to view their video of the case or scenario they participated in and to answer the Learner Self-assignment checklist questions. The Self-Assessment will be made available when the corresponding session video is assigned. The learner will have access to the self-Assessment when the video file is accessed.

Questionnaire Window Overview

1. Click on the **Learner Self-Assessment** hyperlink under the Learner Assessment section of the Activity Page. The Learner Self-Assessment Questionnaire window will pop up.

2. **Questionnaire Instructions for Scoring** - Type in any instructions pertaining to answering the question for the learner in this text field*. (Optional - Use the formatting mini toolbar to stylize your type.)*

3. Add questions in the List box by either clicking the **Add From Library** button or create new questions by clicking the **Add Question** button. *(See detailed instructions to add new questions and Adding questions from here.)*.

4. Questions can be searched by **Question Text, Response Type, Type, Category,** Category Name or Checklist Type by selecting the appropriate drop-down menu next to the **Search** field and then clicking the **Search** button.

5. **Rearrange Question Order** – When multiple questions are added to the List box, the order of the questions in the Checklist can be rearranged by clicking the drop-down arrow in the Order field and selecting the new chronological order.

6. **Select Format** – Select the radio button of the layout style for the Evaluation form the evaluator will receive on their dashboard.

7. The **Categories** field should now list the categories of the questions that were added to the Questionnaire List area.

8. To save, click **Save Changes**.

9. **Buttons at the top of window:**

   Save All – Saves all changes made in this window.

   Print - Information can be printed by selecting the Print button at the top right of window.

Delete a Listing:

1. In the Learner Pre-encounter window, locate the file to be deleted.

2. Click the **X** in the Delete column to delete a listing.

To Edit a question:

1. Click on the question name hyperlink.

2. The Question window will pop up.

3. Edit the question.

4. Click **Save Changes**.

Copy a Listing:

Copy – Click the **copy icon** under the Copy column to make a copy of a checklist item (this is a good idea if you want the same set of questions listed in an existing checklist and maybe want to edit the title or content without changing to the original question).

Back to Learner Pre-Encounter

Back to Learner Post-Encounter

Back to Survey

Back to Learner Self-Assessment

Add From Library

Copy Questions

*Search for question text in the Items Library, Checklists, or Cases, select the question from the grid, and then click **Add.***

Type ☑ Items Library ☐ Checklists ☐ Cases/Scenarios

Checklist/Case/Scenario Select Search

Search All Search

☐	Question Text	Response Type	Type	Category Name	Checklist Type
☐	1. Did SP wash his/her hands in front of learner??	Yes/No	Items Library	handwashing	
☐	adapted to my level of understanding	1-3	Items Library	Patient Physician Interaction	
☐	Administered solu-medrol IV using proper technique?	1-4	Items Library	Medication Administration	
☐	Administered solu-medrol IV using proper technique?	1-4	Items Library	Medication Administration	
☐	AGGRAVATING:What makes the pain worse?	Yes/No	Items Library	History Taking (H)	
☐	Analyzes data collected for trends and missing information.	1-4	Items Library	Critical Thinking	
☐	and SPs. Blueprints are recommended for scheduling OSCEs. The blueprint created in the Sessions & Courses task	Yes/No	Items Library	1. Student treated iliopsoas dysfunction with coun	
☐	Answered medical history questions correctly	Yes/No	Items Library	Knowledge	
☐	Any family history of chemical exposure	Yes/No	Items Library	Family History	
☐	Anything make the pain better or worse must ask both for credit (better: curled in fetal position; worse: walking, movements)	Yes/No	Items Library	History Taking (H)	
☐	Appetite decreased	Yes/No	Items Library	History Taking (H)	
☐	Appropriate intubatin technique.	1-4	Items Library	Rapid Response	
☐	Are the parents allergic to animals?	Yes/No	Items Library	Family History	
☐	Asked about allergies	Yes/No	Items Library	Chest Pain	
☐	Asked about pain	1-3	Items Library	Exam	

264 record(s) found... View 15 1 2 3 4 5 6 7 8 9 10 ...

Add

Add from Library Pop-up window:

Lists questions already in the Item Library (questions need to be in Active status and applicable as an Assessment question).

To add questions from Library:

1. Click the **Add From Library** button above the List box.
2. The Add From Library button will open a **Copy Question** pop-up window, where a directory of questions from the **Items Library, Checklist, and Cases** *(that have been designated as a Team Assessment or Learner Assessment Checklist Type in **Cases & Scenarios > Checklist**)* can be listed.
3. Click the **Type** checkboxes to populate the Question list from the Items Library, Checklists, and/or Cases areas.
4. Question search can be filtered by **Question Text, Response Type, Type, Category Name or Checklist Type** *(from the Items Library, other Checklists or other Cases)* by selecting the appropriate drop-down menu next to the **Search** field.
5. Click the **Search** button; the list will change according to the new search criteria.
6. Click on the **checkbox** next to the question you want to add.
7. **Response Type** column indicates the type of answer response required for the question. This can be customized by clicking on the Question Text's hyperlink in the List box.
8. Click the **Add** button to add the question to the questionnaire.

Back to Learner Pre-Encounter

Back to Learner Post-Encounter

Back to Survey

Back to Learner Self-Assessment

Learner Self-Assessment – Add Question

New questions can be created here *(This is the same as going to the Items Library > Questions > New)*. They can also be added from here to the Items Library so they can be available for use in any case or scenario.

1. Click the **Add Question** button.
2. A **Question** window will pop up where you can specify the Category, Question, Grading Information, and Question Response Type.

3. **Add to Category** – Select a Category that is already in the **Items Library > Categories** database by selecting the drop-down menu and selecting one of the categories listed. When the Category is selected, the accompanying **Response Type** (*type of answers required*) will be listed. The response type can be changed within the category by using the **Customize** button. Use **Default Scoring** brings customized scoring to match the rest of the category.

4. **Add New Category** – Click **Add New Category** button to define a new Category.

5. The Add New Category pop-up window:

   Response Type – Select the type of response (*answer type*) from the drop-down menu. *(i.e., a Yes/No answer, a Likert Scale of 1-9, True/False, etc. You may use keyword scoring for free-text type questions, though this is not required. Free-text style questions may be read and scored by a faculty evaluator. When selecting Text with Keywords, identify the keywords and misspellings in the keyword dictionary. Enable keyword scoring for the question and then associate the keywords)*.

   Name – Type a name of the Category *(based on the subject matter of the questions that will be contained in the category, i.e., Communication Skills, Physical Exam, etc.).*

   Weight – Enter the weight of this category. A question needs to be weighted for the choice to be counted in the scoring process. The default value is 1. This is used for calculating the weighted average mean score for the category, when multiple questions within a category are used. Questions within a category can be weighted differently, and some categories can be weighted differently than other categories. The system will adjust score according to weight given. A weight of zero means the data can be collected but it won't count in the scoring process.

   Required Pass % - (*Optional*) This is the minimum overall score that is needed for a student to pass the case. A zero in this box denotes that there are no minimum pass requirements for the case.

   Status – Select the status of the question. Active means it is actively in the system and can be used in future cases and scenarios. Retired means inactive and ineligible for future use.

   Response Choices – Click on the hyperlink under the Choice column and define the answer choice that pertains to the Response Type that was selected *(i.e., Low/Moderate/Severe; or Poor/Good/Excellent, etc.)* by labeling the choice in the Choice text field.

   Score – Indicate the amount of credit received by selecting this choice.

   Click **Save** to return to the Add Category window.

   When the fields are complete, click the **Create** button.

   A message window will pop up asking if you want to create additional categories; click **Yes** to add another question or click **No** to return to the Question window.

Back to the Question window:

6. If a new category was added in the previous step, it will be available in the drop-down menu. Select the **Category** for your question.

7. **Copy Question Text** button - When this button is selected, a **Copy Question Text** box will pop up allowing you to select a question from the list; the question text will now be copied and pasted into the **Question Text** box.

8. **Question Text** – Type the question in this field *(Option - Use the formatting mini toolbar to stylize your type)*.

9. **Include Instructions** – Click this checkbox if you want the instructions to be visible to the evaluator.

10. **Question Weight** – Enter question weight. A question needs to be weighted for the choice to be counted in the scoring process. The default value is 1.0. This is used for calculating the weighted average mean score for the category, when multiple questions within a category are used. Questions within a category can be weighted differently, and some categories can be weighted differently than other categories. The system will adjust score according to weight given. A weight of zero means the data can be collected but it won't count in the scoring process.

11. **Must Pass** – Check this box if the correct response to this question is mandatory for the learner to pass the entire exercise. Checking this box will populate the Question Weight and Minimum Required percentage to pass fields. These are mandatory in order to specify the conditions to pass.

12. **Customize** – Clicking on this button will enable customization of the Response Choices and populate a **Reset to Default** button, an **Add From Choice Group** button and an **Add Choice** button:

    Reset to Default – Deletes the customization of the response choice and resets to default.

    Add From Choice Group – Allows you to add customized choice groups that are defined in **Items Library > Choice Group** task. The list can be expanded by clicking on the + sign to reveal the choice details. Make selection by checking checkboxes and clicking the **Add** butto*n (Be sure to adjust the Response Type to match the total number of choices).*

    Add Choice – This will add an additional Choice in the Response Choices box. Clicking on this button will open a Choice pop-up window. If the checkbox for **Score and Weight is Applicable** is checked, Score and Weight needs to be indicated. Click the **Update** button.

    Add to Choice Group – Click on this hyperlink to add your choices from the step above to the **Choice Group** database (***Items Library > Choice Group***) so it will be available for future use.

13. **Response Choices** –The order of the questions can be rearranged by selecting the numbers next to the questions.

14. Limit Choices Required for Response – When this is checked, the **Minimum Choices Required for Response** box and the **Maximum Choices Allowed** box will become available.

    Minimum Choices Required for Response - Set the minimum number of choices that can be selected.

    Maximum Choices Allowed – Set the maximum number of choices allowed to be selected.

15. **Score** – Determine the amount of points to be credited for the correct response.

16. Based on the weight of each response choice, the Minimum score and the Maximum score are indicated. These can be changed by clicking on the Choice hyperlink and changing the score for each response or by checking **Include Advanced Scoring Options**.

17. **Include Advanced Scoring Options** – When this is checked, the Advanced Scoring Options box becomes available.

    a. Click the Add Scoring Options button to specify customize scoring for each choice to customize the Score, Weight and Criteria.

    b. When **Score and Weight is Applicable** is checked, enter the Score amount, Weight and Criteria for this choice by checking the choice checkbox, inputting the Score, Weight and Criteria.

    c. **Score** – Determine the amount of points credited for the correct answer. Check the correct choice and indicate that in the Score box. There may be multiple choices that are correct; if so, check those checkboxes and add the Score in the score box. Add the Weight in the weight box and then add the **Criteria** (*number of correct choices to receive the score*).

    d. **Criteria** – To specify the criteria for learner to pass this question, click the checkbox next to the choice(s) designated as the correct answer(s). Indicate the number of choices that are checked in the Criteria box.

       For example: If there are 3 choices and 2 are correct or are eligible to receive the amount of credit indicated by the Score, check those 2 choices, add the weight and the score for those choices and in the Criteria box, indicate 2.

    e. Click the **Add** button.

    f. Repeat for each choice by clicking on the **Add Scoring Options** button in the Response Choices box.

    g. Indicate the incorrect choice by selecting that choice's checkbox and adding 0 in the criteria box. Also put 0 in the Score box with a Weight of 1. A negative number can be indicated if points will be deducted for the incorrect choice.

h. **Weight** must be at least 1 just so the data is collected; the Weight is not the score.

i. Click the **Save Changes** button.

18. **Add to Items Library** – Click this box to add question to the Items Library database. This will enable the question to be available for any scenario. Clicking on this checkbox will populate:

    Applicable Checklists – Team Performance or Learner Self-Assessment; select either or both of these if the question can also be applied to these checklists.

19. **Save and Add New** – Click this button if you want to save this question and add additional questions. If not, click **Create**.

To Delete a question:

*Click the red **X** icon in the **Delete** column of the question to be deleted, or to delete the entire checklist, uncheck it in the Evaluation Summary section.*

To Edit a question:

1. Click on the question name hyperlink.
2. The Question window will pop up.
3. Edit the question.
4. Click **Save Changes**.

Copy a Question:

Copy – Click the **copy icon** under the Copy column to make a copy of a question.

Back to Learner Pre-Encounter

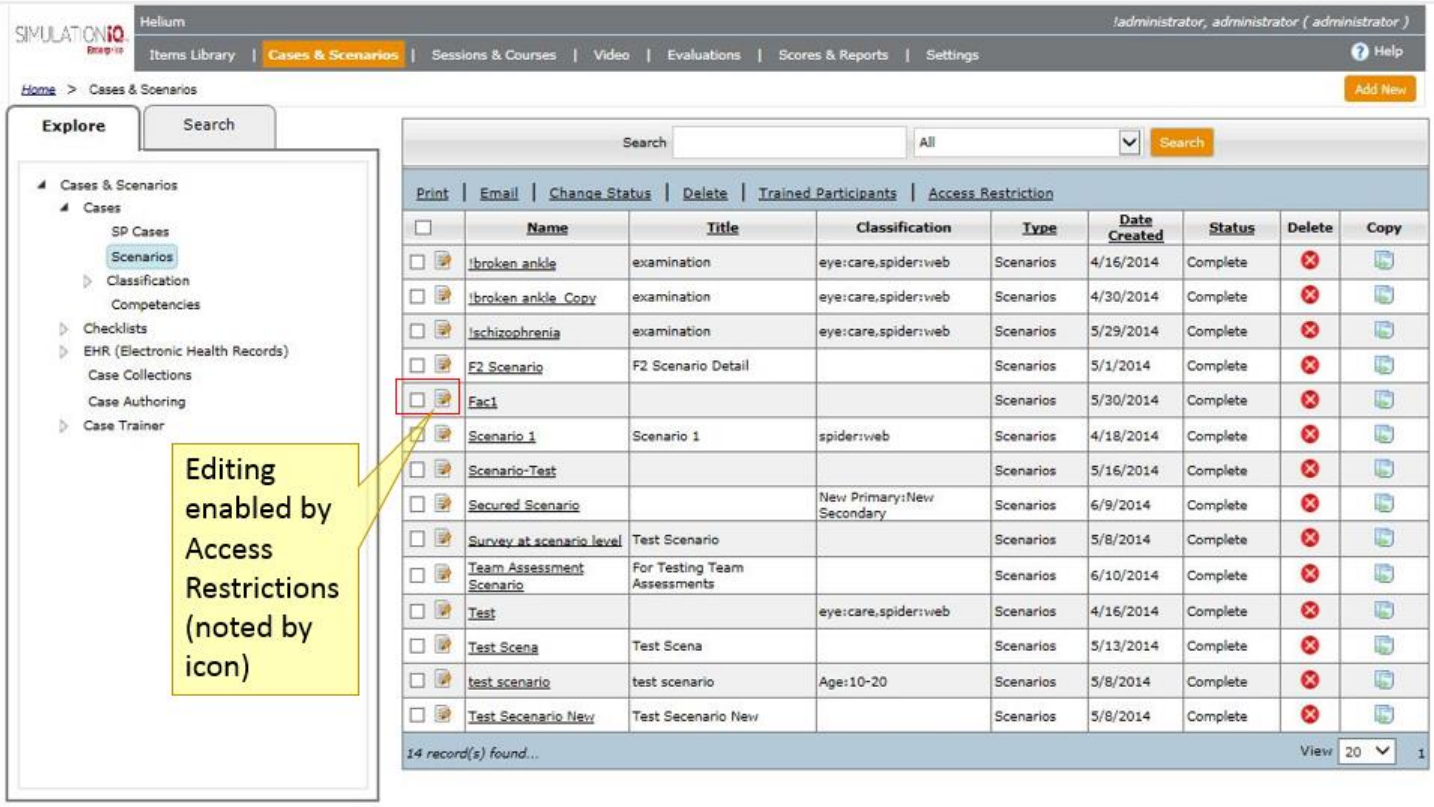
Back to Learner Post-Encounter

Back to Survey

Back to Learner Self-Assessment

Access an Existing Scenario

From the Scenario Landing page, access an existing scenario by clicking a checkbox next to the Scenario name and clicking the link in the **Name** column, as shown:



Note: If edit access has been enabled using Access Restriction functionality, an edit icon will appear next to the checkbox.

Case Collections

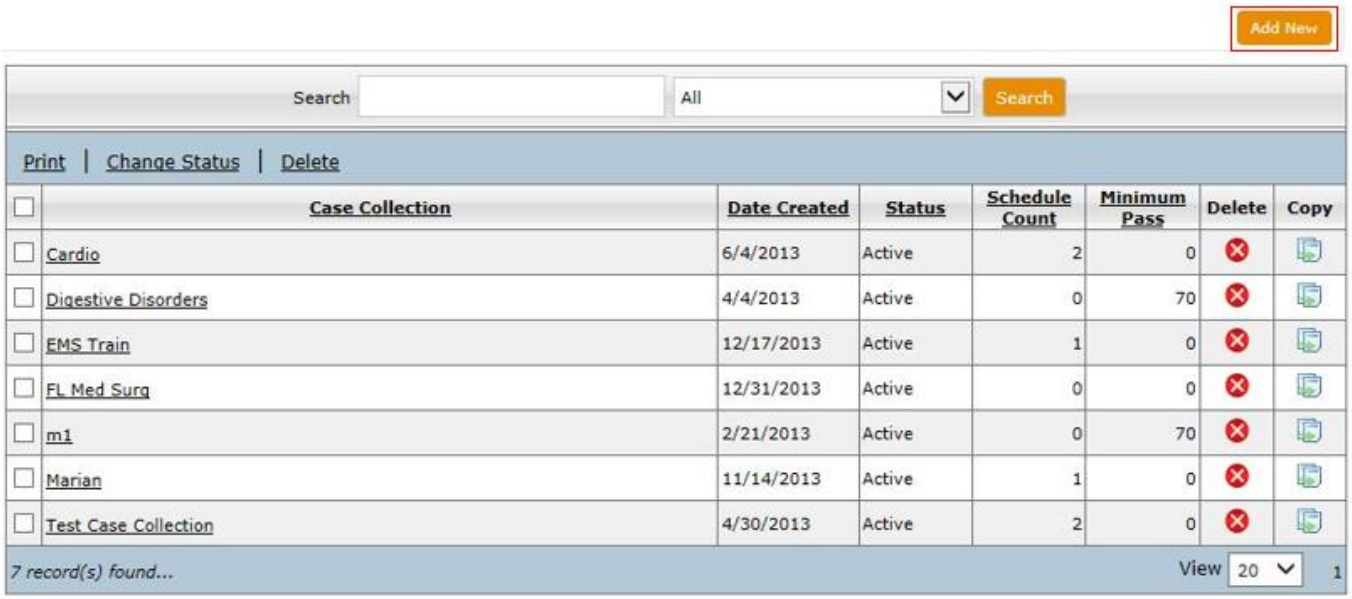
► A series of SP encounters is called a **Session**. Since multiple cases can be used in a session, they can be grouped together into a **Case Collection**. This is a way to help you organize the cases you will use and filter out the cases you will not need for scheduling a session. There can be any number of cases in a collection, and the case can be a member of multiple collections.

Create a New Case Collection

Collections can be added, edited, copied, or deleted by clicking on this link or from the **Cases & Scenarios > Case Collection task**.

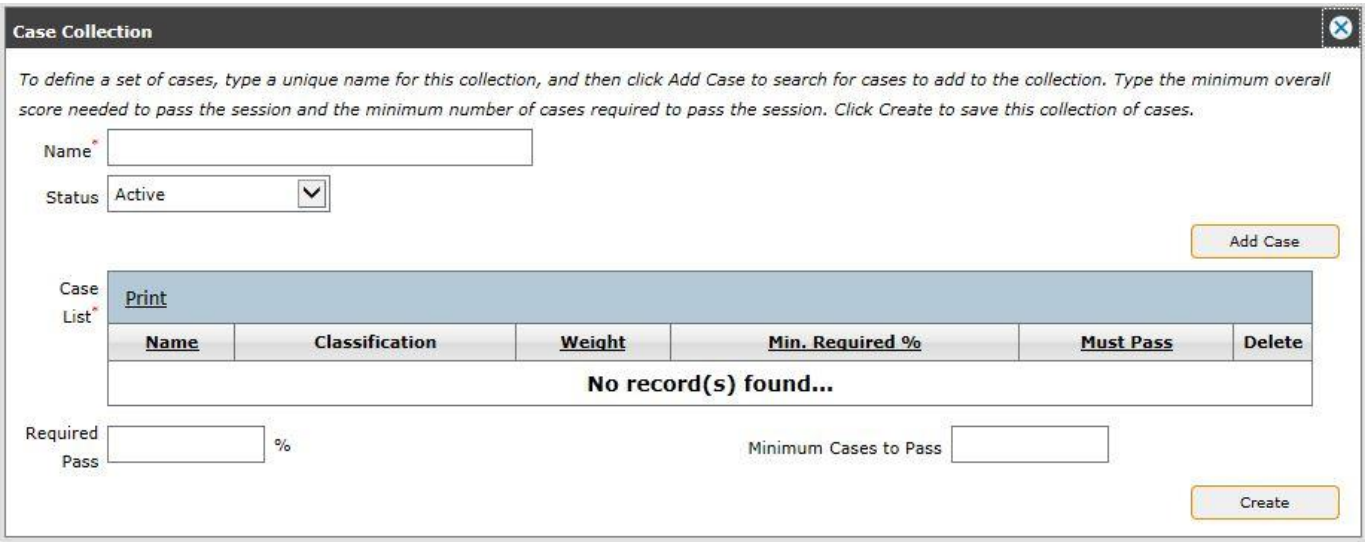
Create a new Case Collection in any of these 3 ways:

1. On the **Cases & Scenarios Task Landing Page**, click the **New** button (shown above).



2. On the **Case Collection Search Results Page**, click the **Add New** button (shown above).

New Case Collection window will pop up:



1. Type a unique name for this collection.

2. Enter Status:

   Active – Available for use and scheduling.

   Retired – Inactive, not available for scheduling.

3. **Add Case** to Case List: Click the **Add Case** button; the **Cases** window will pop up.
4. Enter a **Required Pass** percentage (optional).
5. Enter a **Minimum Cases to Pass** number (optional).
6. Press **Create** to save your Case Collection.

Cases window:

Search for cases to add to a collection:

1. Search for cases to add to a collection by typing keyword(s) in the search field.

2. Click the drop-down arrow to select the search criteria to narrow you search. **Search** by **All cases, Case Name**, **Case Title,** or **Type**.

3. The search results appear in the grid based on the keyword entered.

4. Increase the number of listings in the view per page by clicking on the drop-down arrow next to **View** on the bottom of the grid.

5. Click the checkbox next to the case to select it.

6. Type the **Weight and the Minimum % required** to pass the case.

   Weight – Enter case weight. A case needs to be weighted for it to be counted in the scoring process. The default value is 1.0. The Weight of the case is used to calculate the weighted mean average score for the session for each student. This information is mandatory. *Enter up to 2 decimal places for Weight (i.e., 1.00)*.

   The system will adjust score according to weight given. A weight of zero means the data can be collected but it won't count in the scoring process.

   Minimum Required % - The minimum overall score percentage that is needed for a student to pass the Case. A zero in this box denotes that there is no minimum pass requirement for the case.

   Must Pass - Click the checkbox if this case is required to pass.

7. Click the **Add** button to add the selected cases to the collection.

8. **Create/Save** – Click the **Save** button to save your case or **Create** if creating a new collection.

Edit a Case Collection:

1. Click the name of the collection in the **Case Collection Search Results Page**.

2. The **Case Collection** window will pop up listing the cases that make up this collection.

3. **To rename collection** - Click the **Name** text field, select the existing type and retype the revised Case Collection name.

4. **Change Status** – Click the **Status** drop-down arrow and select desired status (Retired, Active).

5. **To Add Case a case to the collection** - Click the **Add Case** button.

6. The **Cases window** will pop up**.**

7. Search and select the checkbox next to the case you want to add:

8. Type the **Weight and the Minimum % required** to pass the case.

   Weight – Enter case weight. A case needs to be weighted for it to be counted in the scoring process. The default value is 1.0. The Weight of the case is used to calculate the weighted mean average score for the session for each student. This information is mandatory. *Enter up to 2 decimal places for Weight, i.e., 1.00.*

The system will adjust the score according to weight given. A weight of zero means the data can be collected but it won't count in the scoring process.

Minimum Required % - The minimum overall score percentage that is needed for a student to pass the Case. A zero in this box denotes that there is no minimum pass requirement for the case.

Must Pass - Click the checkbox if this case is required to pass.

9. Click the Save Changes button to add the selected cases to the collection.

10. The case will now be listed in the **Case Collection**.

11. Back in the **Case Collection** window, click the **Save** button to save your changes.

Delete a case from a collection:

1. In the **Case Collection Search Results Page**, click the name of the Case Collection.

2. The Case Collection window will pop up.

3. Locate the case you want to delete from the collection and click the red **X** in the Delete column.

4. A message window will pop up asking if you are sure you want to delete. Click the OK button to go ahead with the deletion. Cancel will not delete the case; it will take you back to the Case Collection window.

5. Click the **Save** button.

Delete an entire Case Collection:

1. Locate Case Collection listed in the Search Results Page.

2. Click the red **X** in the Delete column, or click the checkbox next to the Case Collection name and click **Delete** on the menu.

3. Click OK.

Quickly Change Status of a Case Collection:

1. In the Case Collection Results Page, click the Checkbox next to the Case Collection you want to change.

2. Click the **Change Status** menu.

3. The Change Status window will pop up.

4. Click the drop-down arrow to select whether the Case Collection is active or retired, and then click **Change Status**.

Checklists

Application Workflow

► A **Checklist** is an evaluation tool used to assess the performance of a learner(s) or an SP during an encounter. They are broken down into 2 groups:

Learner Assessments

- Learner Pre-encounter – Checklist questions presented to the learner before the encounter.
- Learner Post-encounter – Checklist questions presented to the learner after the encounter.
- Learner Self-Assessment - Essentially used by the Learner to assess themselves.

Performance Assessments

- Survey – Where a Student completes a case/scenario or session-level survey at the conclusion of the case/scenario or session.
- Performance Assessment – Where the SP or Faculty assesses the learner's performance in the encounter.
- SP Performance Assessment – Where the SP's performance in the encounter is assessed by another SP or Faculty member.

Checklists can also be used for a Survey, which is not graded, but the data can be collected for reports.

► A Checklist can be comprised of study documents, computer exercises, questionnaires, and SOAP/ Patient Notes.

► It is recommended to first set up **Categories (Items Library > Category)** according to the type of test (**Learner Assessment, Survey**, etc.). Then, questions (**Items Library > Questions**) can be added to the checklist.

► **Checklist questions** may also be stored in the **Items Library** by creating the question and then clicking **Add to Items Library** button, so that they are available for use in any case or scenario at any time. This adds

them to the database.

► Checklists are applied to a case or scenario by attaching them to the **Evaluation Summary** and the **Learner Assessment** sections of that case or scenario's **Activity Page**. Then, the person filling out the Checklist will have it on their **Dashboard's To-Do List** when they log in.

► For Checklist questions and Categories to be available to be added to an Assessment, their Status needs to be set to Active; Status for Checklists need to be **Complete**.

► Checklist scores can be extracted by various categories, not just by case or scenario.

Checklist Sub-Items:

- Learner Pre-encounter
- Learner Post-encounter
- Learner Self-Assessment
- Survey
- Performance Assessment
- SP Performance Assessment – used in SP Cases, not scenarios

Types of Checklists

Learner Pre-encounter

► Pre-Encounter questions are checklist items presented to the learner before the encounter. Checklists are applied to a case or scenario by attaching them in to the **Learner Assessment** section of that case or scenario's **Activity Page**. Then, the person filling out the Checklist will have it on their **Dashboard's To-Do List** when they log in.

► The amount of time it is available to the learner and the time allotted for completion is specified on the case or scenario's Activity Page.

► When a Learner Pre-encounter checklist is created (**Cases & Scenarios > Checklists**) and saved, it is then stored in the system's database for future use in any case or scenario.

► Clicking on this link will populate the Search Results Page with **Learner Pre-encounter** questions already in the **Items Library** database.

► From the **Learner Pre-encounter Search Results Page**, Pre-encounter questions can be searched, created, edited, status changed, deleted, copied, printed, and emailed.

Learner Post-encounter

► Post-encounter questions are checklist items presented to the learner after the encounter. Checklists are applied to a case or scenario by attaching them to the **Learner Assessment** section of that case or scenario's **Activity Page**. Then, the person filling out the Checklist will have it on their **Dashboard's To-Do List** when they log in.

► The amount of time allotted for completion is specified on the case or scenario's Activity Page.

► When a Learner **Post-encounter checklist** is created (**Cases & Scenarios > Checklists**) and saved, it is then stored in the system's database.

► Clicking on this link will populate the **Search Results Page** with Learner Post-encounter questions already in the **Items Library** database.

► From the **Learner Post-encounter Search Results Page**, Post-encounter questions can be searched, created, edited, status changed, deleted, copied, exported, printed, and emailed.

Learner Self-Assessment

► **Learner Self-Assessment** questions are checklist items for the learner to assess their own performance.

► **Learner Self-Assessments** are for the learner to view the video of the case or scenario they participated in and to answer the Learner Self-assignment checklist questions. The Self-Assessment will be made available when the corresponding session video is assigned. The learner will have access to the Self-Assessment when the video file is accessed.

► When a **Learner Self-Assessment** checklist is created (**Cases & Scenarios > Checklists**) and saved, it is then stored in the system's database for future use in any case or scenario.

► Clicking on this link will populate the Search Results Page with Learner Self-Assessment questions already in the **Items Library** database.

► From the **Learner Self-Assessment Search Results Page**, Self-Assessment questions can be searched, created, edited, status changed, deleted, copied, exported, printed, and emailed.

► The **Learner Self-Assessment** evaluation report may be generated from Scores & Reports.

Survey

► A case author may add a student survey to be made available at the case level (after each case), scenario level (after each scenario) or the session level (during the course of a session or OSCE, or conclusion of a session). This is useful for generating Survey Analysis Reports.

► A **Survey** is applied to a case or scenario by attaching it to the Learner Assessment section of that case or scenario's Activity Page. Then, the assigned participants will have it on their To-Do List when they log in.

► When a **Survey** is created (**Cases & Scenarios > Checklists**) and saved, it is then stored in the system's database for future use in any case or scenario.

► Clicking on this link will populate the **Search Results Page** with Surveys already in the **Items Library** database.

► From the **Survey Search Results Page**, Survey questions can be searched, created, edited, status changed, deleted, copied, exported, printed and emailed.

► An on-demand Standalone survey is another kind of Survey. This is a Survey that is independent of any Case or Scenario and is created in **Session Calendar > Survey**. It can be created and made available for students, SPs and faculty to complete over a pre-defined period. This can be submitted anonymously.

Performance Assessment

► This is assigned to SP or Faculty to assess the learner's performance during an encounter. The SP or Faculty need to be designated with Evaluator permission in **Settings > User Management > User List >**

Permissions in order to be eligible to be assigned as an evaluator. The evaluator is assigned to the case or scenario when scheduling the event in **Session Calendar > Session>Session Evaluators**.

► When a **Performance Assessment** is created (**Cases & Scenarios > Checklists**) and saved, it is then stored in the system's database for future use in any case or scenario.

► Clicking on this link will populate the **Search Results Page** of **Performance Assessments** already in the **Items Library** database.

► Questions can be searched, created, edited, status changed, deleted, copied, exported, printed and emailed. The revised questions do not affect preexisting instances of the same Checklist.

► Results of **Learner Performance Assessments** can be applied toward Competency skills.

SP Performance Assessment – *used in SP Cases, not scenarios*

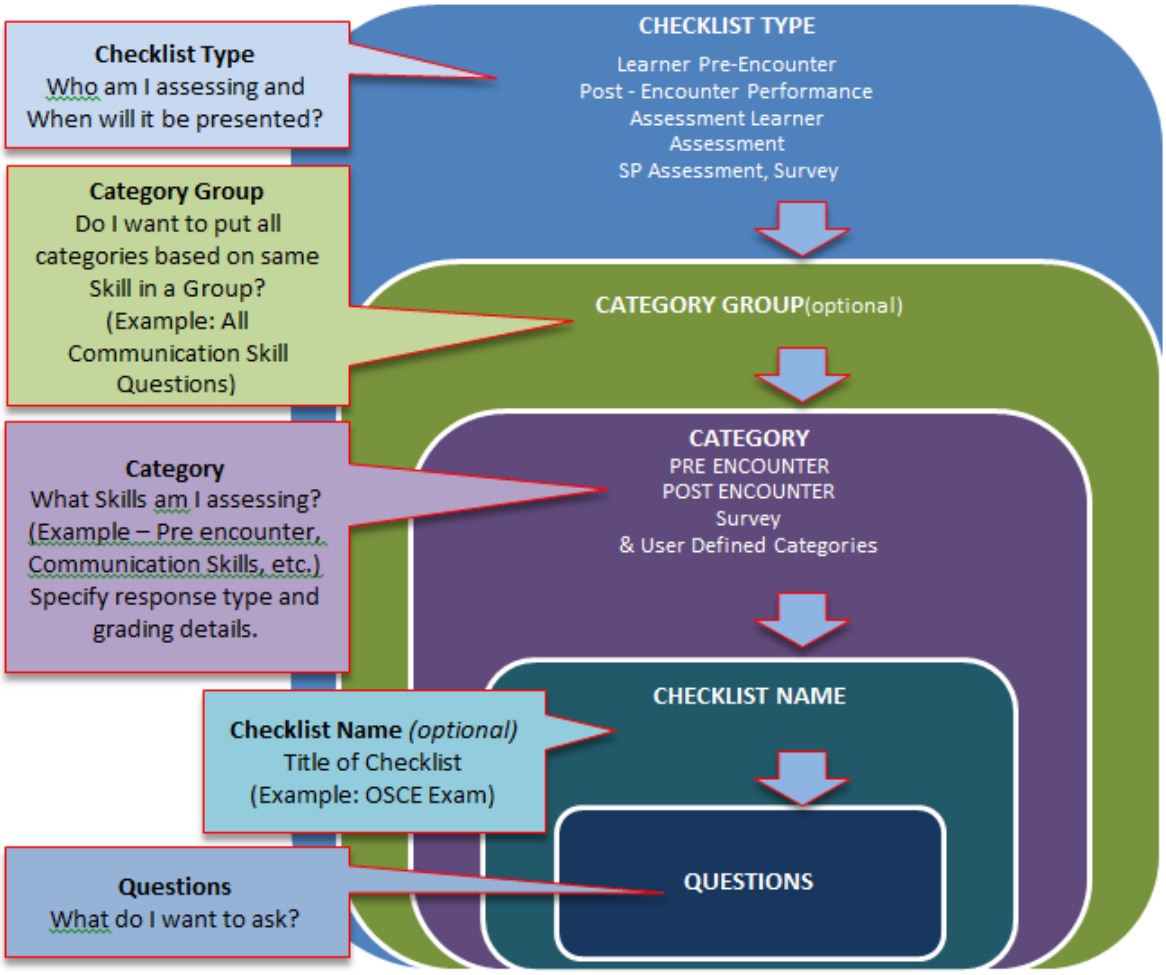
► The SP Performance Assessment is used to evaluate the SP's performance. This is done by a faculty evaluator or another SP, and is assigned when scheduling the session using the Session Calendar.

► When an SP Performance Assessment is created (**Cases & Scenarios > Checklists**) and saved, it is then stored in the system's database for future use in any case or scenario.

► Clicking on this link will populate the **Search Results Page** with Performance Assessments already in the database.

► From the SP Performance Assessment Search Results Page, questions can be searched, created, edited, status changed, deleted, copied, exported, printed and emailed.

Checklist Hierarchy Chart



EHR (Electronic Health Record)

► Designed to enable students to gain practice in using an EHR as part of their medical training.

► Create virtual patients, and develop their medical histories via a library of electronic forms.

► Associate one or more virtual patients with cases and/or simulation scenarios.

► Enable students to view and/or edit a patient's EMR during the Pre-Sim study, Pre-Encounter and/or Post-Encounter.

Application Workflow

1. A virtual EHR patient can be associated not just with a case or scenario, but can also be scheduled independently.

2. In order to be available in a case or scenario, the EHR patient must be assigned to the case or scenario.
   a. A case or scenario may have multiple EHR patients assigned.
   b. An EHR patient may be assigned to multiple cases.
3. The virtual EHR follows the virtual patient through subsequent cases.

4. EHR forms can be assigned to a group or individuals within a SIM session or Team session.

5. Forms can be submitted DURING the session, not just pre/post.

6. When an EHR patient is created and saved, it is then stored in the system's database.

7. Clicking on this link will populate the Search Results Page with the EHR patients already in the database.

   From the EHR Search Results Page, patients can be searched, created, edited, status changed, deleted, copied, and printed.

To create a new virtual EHR patient:

1. Click the **Add New** button on the EHR Search Results Page.

2. Enter EHR **Patient Name** in the text field.

3. Select **Gender** (*optional*) from the drop-down menu. **Non-specific** is suitable for using a patient generically in any case or scenario whose case is not gender specific.

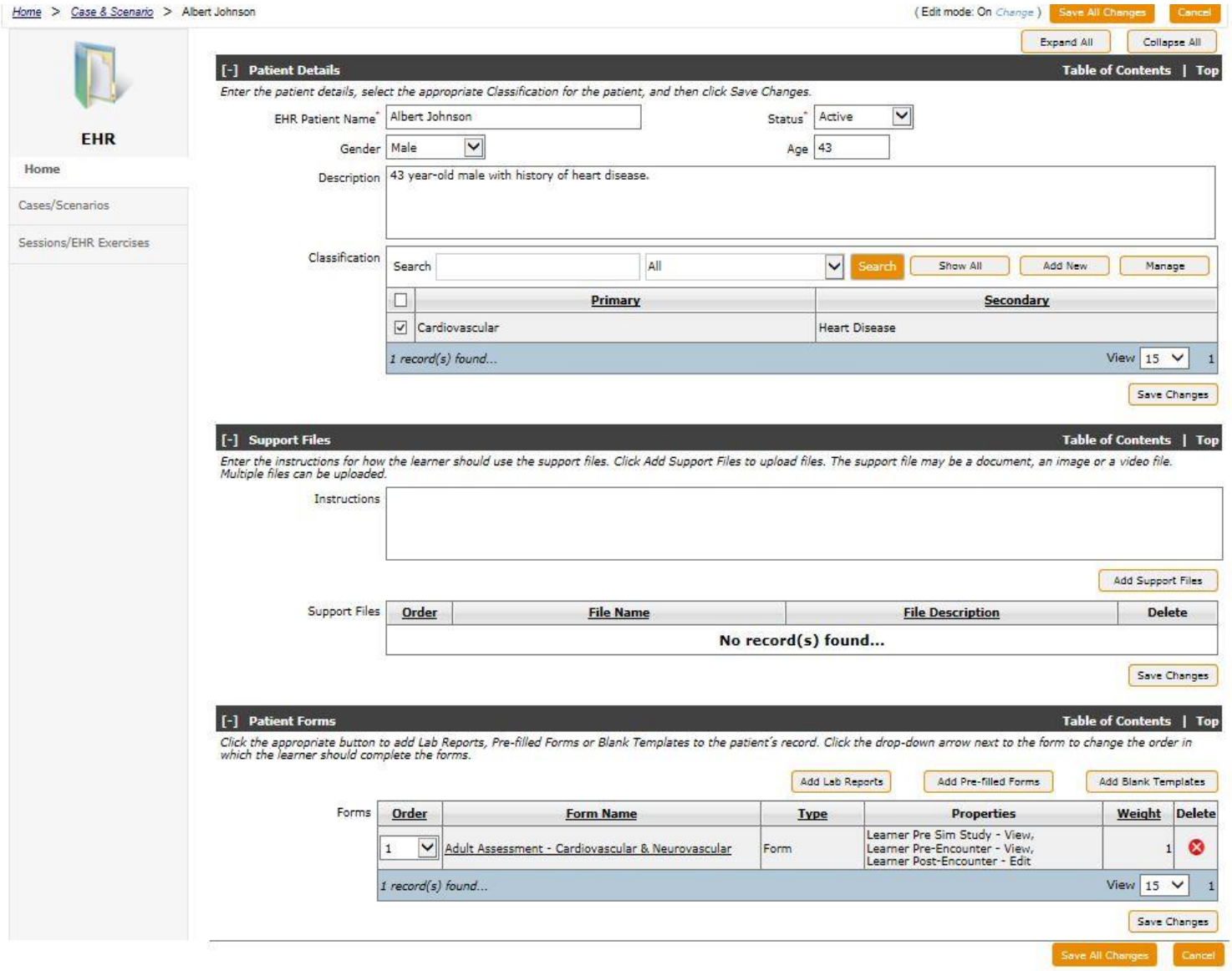
4. Enter the age of the patient in the Age box.

5. Select the **Status** of the EHR patient by clicking on the drop-down arrow and selecting either **Active** *(actively in the system and available for use in a case or scenario)* or **Retired** *(inactive, not available to be selected in a case or scenario)*.

6. Click the **Create** button.

The EHR Activity Page will display where detailed information and support files can be attached to this patient's file.

EHR Activity Page



EHR Activity Page

► Enter virtual EHR patient details; add supporting files, Lab Reports, pre-filled forms, and blank form templates.

► View to which Cases and/or Scenarios the virtual EHR patient has been assigned.

► View in which sessions the virtual EHR patient has been scheduled.

Patient Details

1. Enter EHR Patient Name in the text field.
2. Enter the age of the virtual EHR patient in the Age box.
3. Select the status of the EHR patient by clicking on the drop-down arrow and selecting either **Active** *(actively in the system and available for use in a case or scenario)* or **Retired** *(inactive, not available to be selected in a case or scenario)*.
4. Select **Gender** (*optional*) from the drop-down menu. Non-specific is a selection so the patient can be used generically in any case or scenario whose case is not gender specific.
5. **Description** – In the Description field, type a description for the patient and any observations.
6. **Classification** – Click on the drop-down arrow to select a classification that is already in the database for this patient. To add a new classification click on the **Add New** button. A Classification window will pop up. Type a Primary and Secondary classification in the text fields. Click the **Create** button.
7. **Manage Classification** – Click the **Manage** button to edit, rename, add or delete a classification listing. Click **Save**.

Support Files

1. In the **Instructions** field, enter instructions to show learner how to use the support files.
2. Click **Add Support Files** button to upload files.
3. The support file may be a document, image or a video file. Multiple files can be uploaded.
4. To delete a file, click the **X** in the **Delete** column of the listing you want deleted.
5. **Save Changes**.

Patient Forms

1. Add Lab Reports or pre-filled forms to the grid; also select from blank templates.
2. Change the grid sort order by clicking on the drop-down arrow next to the Order number.

Copy a Patient Profile:

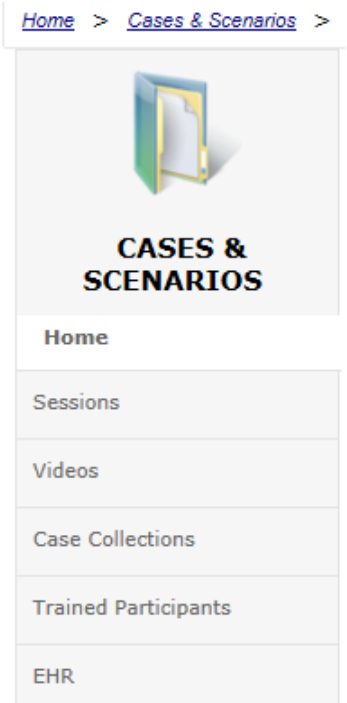
In the EHR Search Results Page:

1. Click the copy icon next to the name field to make a copy of an existing EHR Patient profile.
2. The EHR Patient window will pop up.

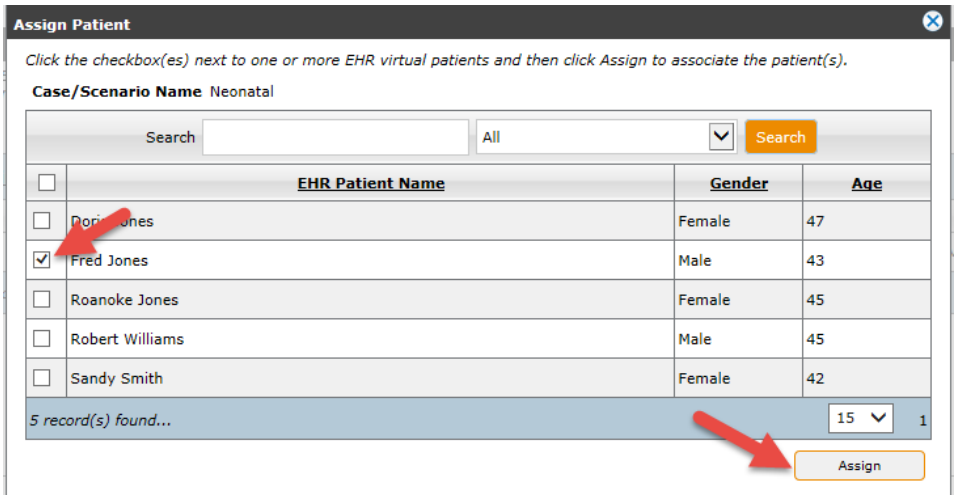
3. Type the name of the new patient.
4. Specify gender and age.–
5. Click **Create**.

Associate an EHR patient to a case or scenario

1. Open either the case or scenario you want to associate with an EHR patient.
2. Click on **EHR** (Electronic Health Record) on either the Tool Belt on the left side of the screen.

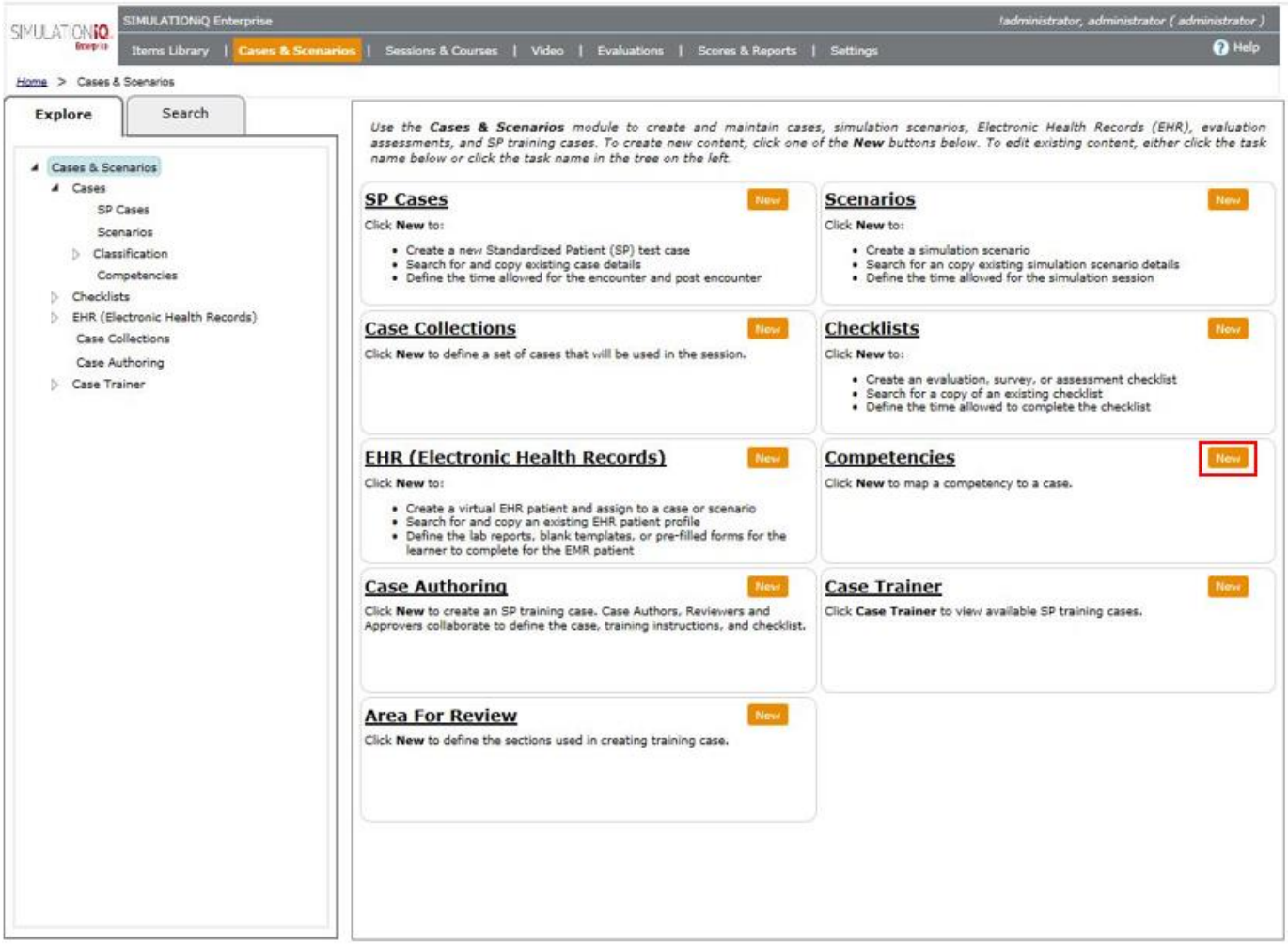


3. Click on **Assign EHR Patient** on the top right of the screen.
4. Click the checkbox to the left of the patient's name which you want to assign to the case/scenario.

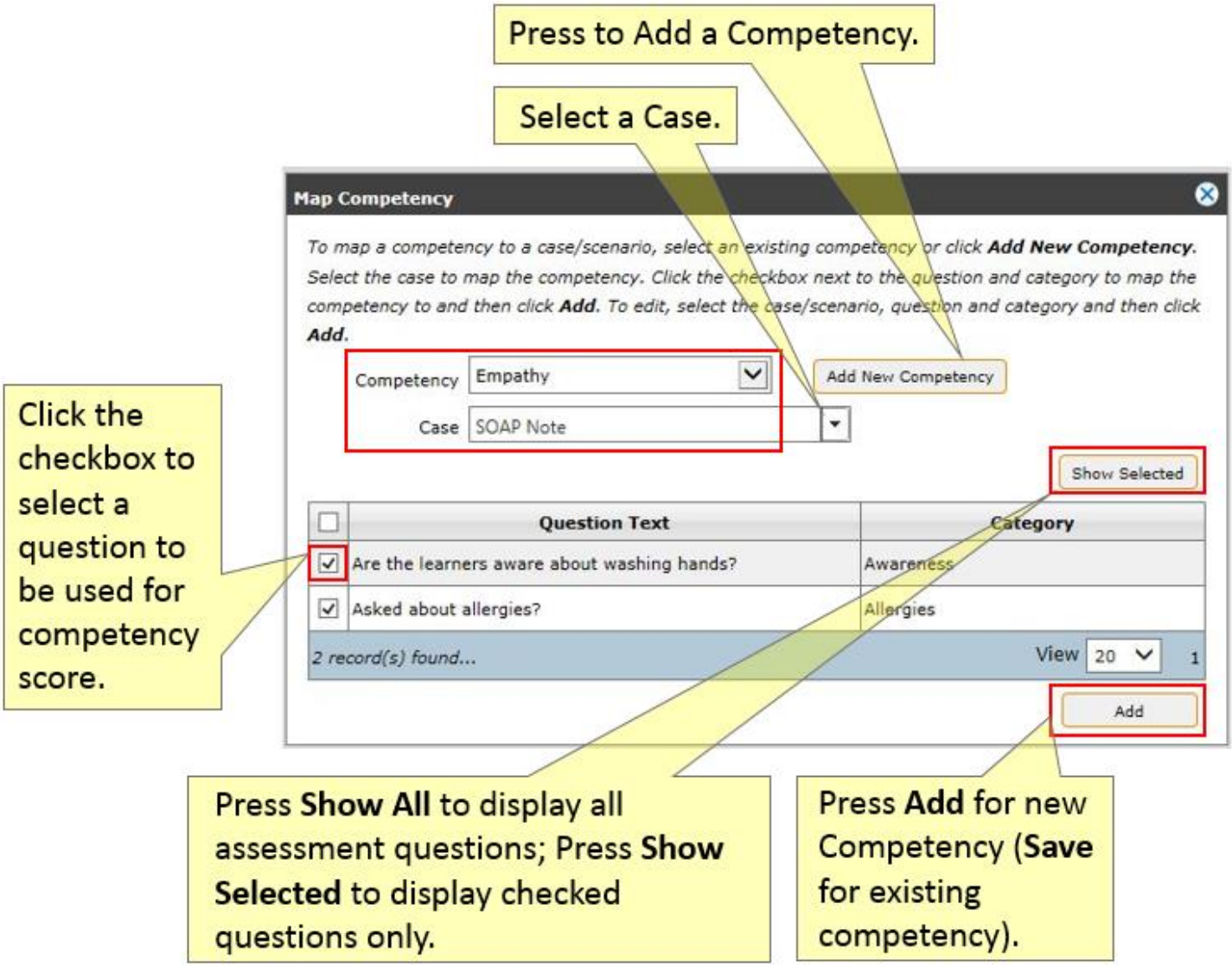


5. Click the Assign button.
6. Save Changes.

Competencies



Click the **New** button as shown to call up the following dialog:



Application Workflow

► A Competency is a skill set that has been mapped (associated) to a case or scenario. The skill set is used to evaluate a learner to meet certain criteria. For example, with a competency type for diverticulitis, the student would be required to identify a diagnostic hypothesis, order labs, and then justify a final diagnosis and treatment plan.

► A learner's competency level in a case is determined by collecting scores based on questions that have been mapped to the case. Use the **Cases & Scenarios>Competency** task to select the questions to be mapped to the competency.

► Enter a competency type in order to construct an exercise to measure that learner's proficiency. For example, organize your checklists by matching the checklist item to the skill/competency or subcategory. The original categories will not be altered and the checklist will not be moved from the original category.

► Competency Skill levels are generated based on evaluator responses of learner assessments. Data will be made available within the Skill Summary Report.

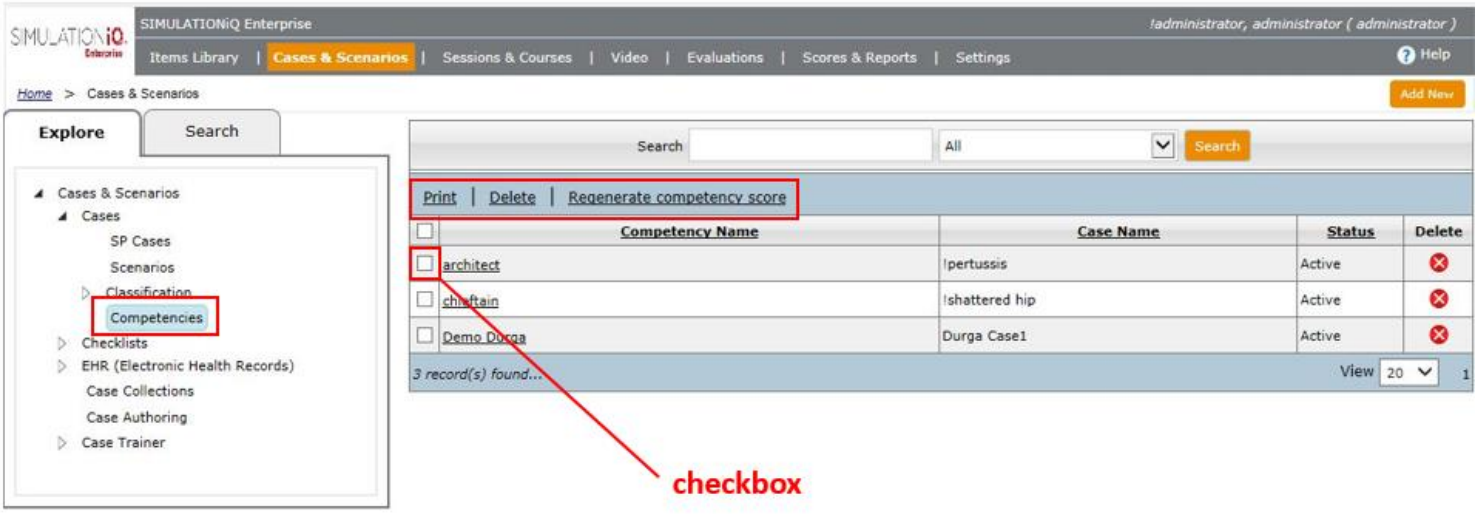
► Clicking on this link will populate the Competency Search Results Page with Competencies already in the database. Here, Competencies can be added, edited, applied to a case or deleted.

► Search for a particular Competency by typing in the name in the Search field at the top of the Search Results Page and utilizing the drop-down menu to filter by Competency name or Status.

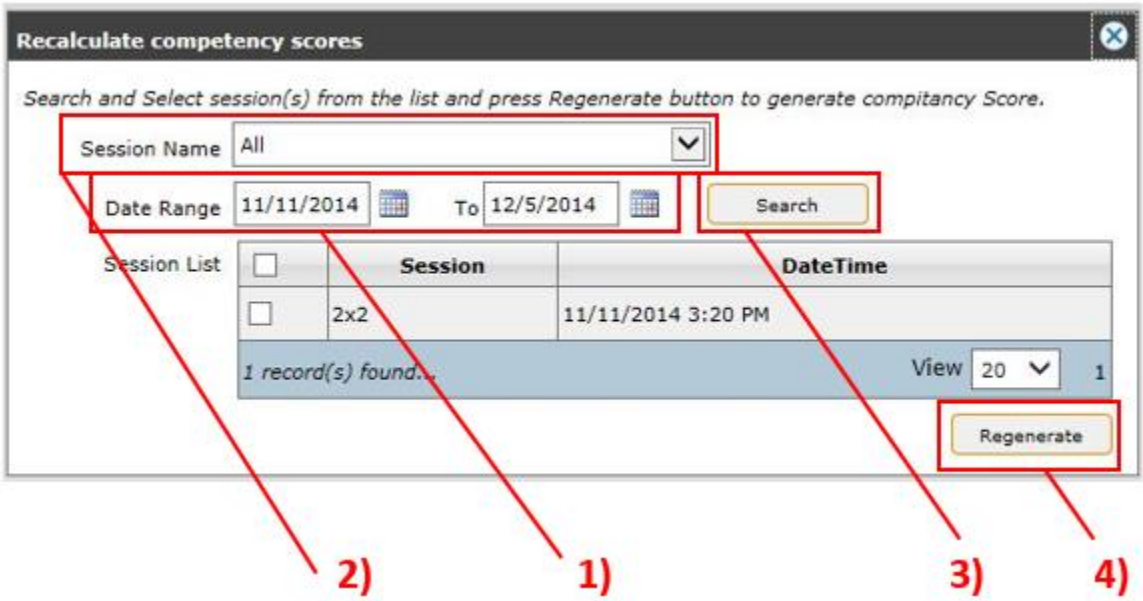
1. To add a competency to a case, select the **Case & Scenarios > Competency** Task.
2. The **Map Competency** window will pop up.
3. Select the case to map the competency to and then click **Show All**. A list of questions from the Performance Assessment (for a case) or a Role-Based Performance Assessment (for a scenario) will appear.
4. Click the **checkbox** next to the question and category to map the competency.
5. Click **Save**.
6. To edit, select the case, question and category and then click **Save**.

You can also regenerate scores for questions associated with a clinical competency after an evaluation using those questions that have already been generated, completed and scored; doing so does not affect existing evaluation scores.

The following action bar selections are available from the landing page (as shown):



Click the checkbox and press **Print** to generate a report of this competency or **Delete** to remove the competency. Select one or more checkboxes and press **Regenerate Competency Score** to call up the following dialog:



1. Select the **Date Range** by clicking on the Calendar icons for the From and To dates.
2. Select the **Session Name** from the drop-down list or select All.
3. Press the **Search** button.
   - A **Session List** (list of sessions using this competency) including date and time are populated in the grid.
4. Press **Regenerate** button to regenerate competency score (a confirmation message appears saying that the competency report can be run again after scores are generated).

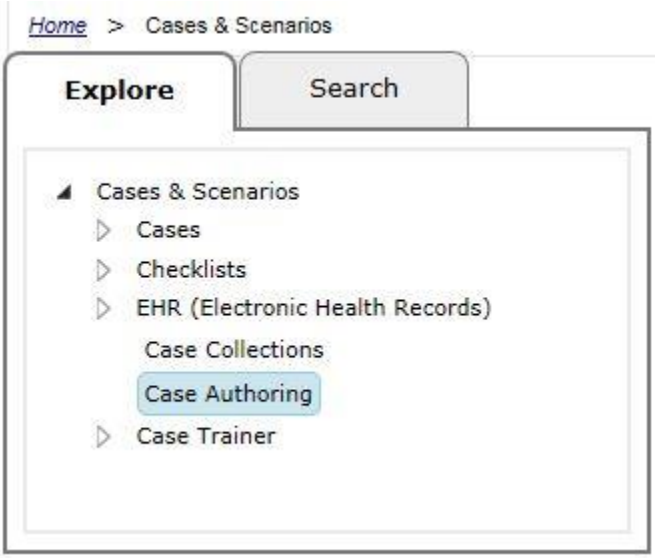
Click one or more checkboxes and press the **Print** action bar selection to generate competency details or **Delete** to remove the competency(ies).

Case Authoring

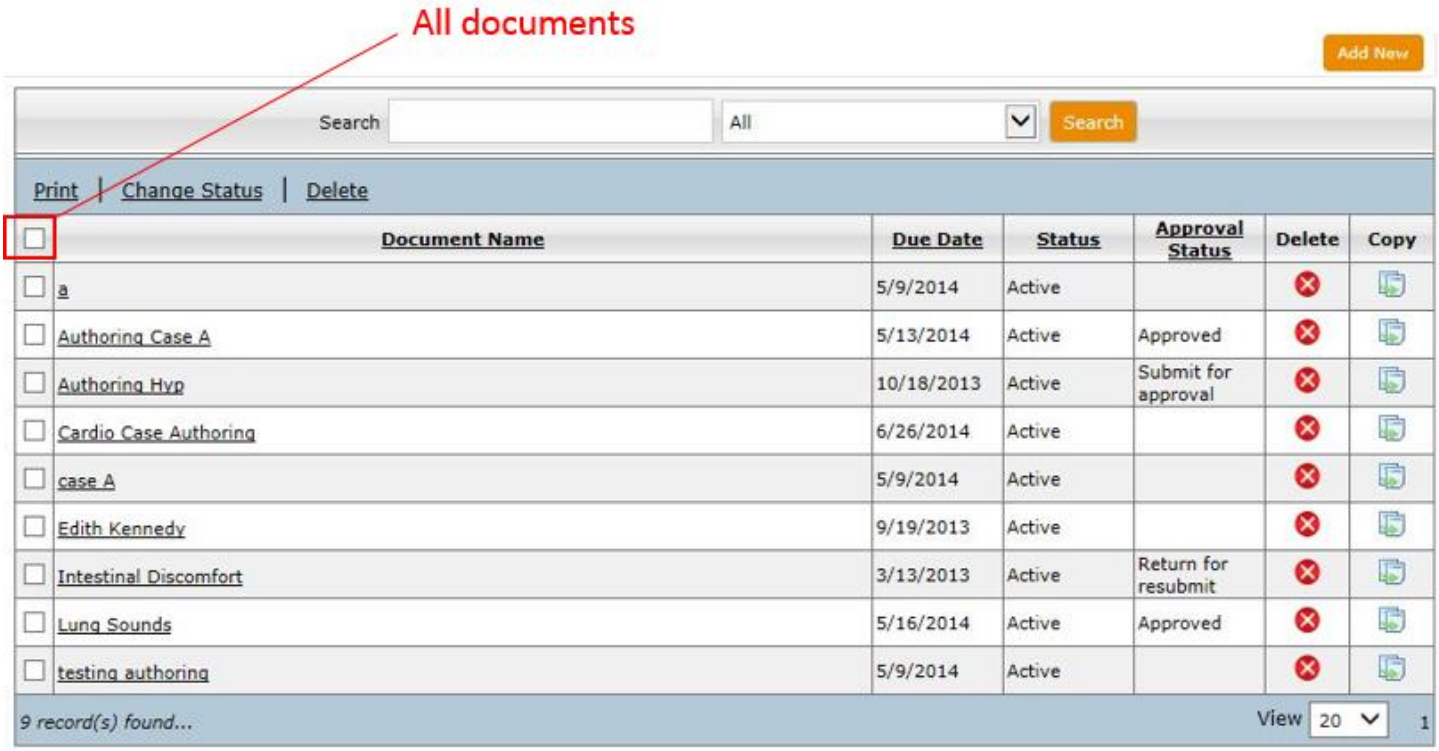
Case Authoring is a tool used to allow users to collaborate and create cases. The information will be collected from one or more authors. Authors will be assigned to one or more “Area for reviews” sections of a case. Training case material (using the Case Trainer) will then be developed using approved case authoring documents.

Searching for Case Authoring Documents

The Case Authoring selection appears from the Cases and Scenarios **Explore** tab as follows:



Click the **Case Authoring** link; the following grid appears:

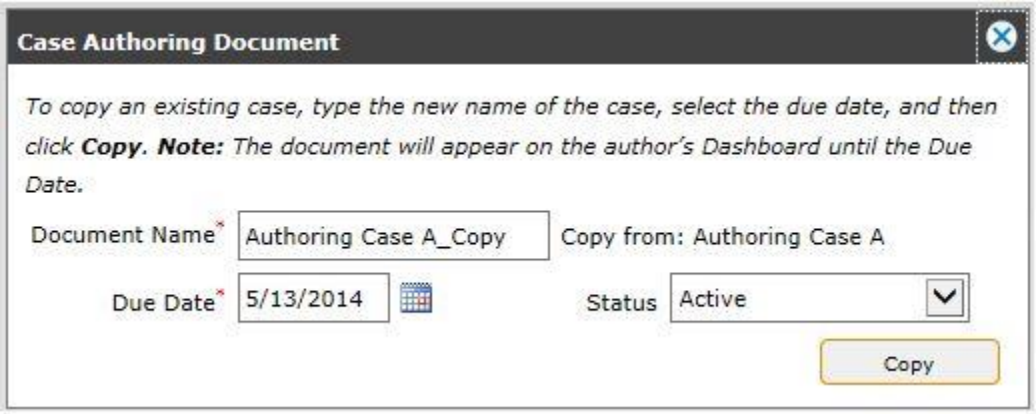


To highlight a document in the grid, click the checkbox next to the document name or click the checkbox in the upper left corner to highlight all documents. You can also click a link from the grid under **Document Name**; this

opens the Activity page displaying the authoring instructions, areas for review, and authors and approvers for the training case.

After clicking one or more document checkboxes, you can print a document or save it as an Excel file. You can also change the status to **Active, Retired**, or **Incomplete**; you can also copy or delete one or more documents (delete functionality is also available by clicking for a checked document).

Click the icon for a checked document to call up the following:

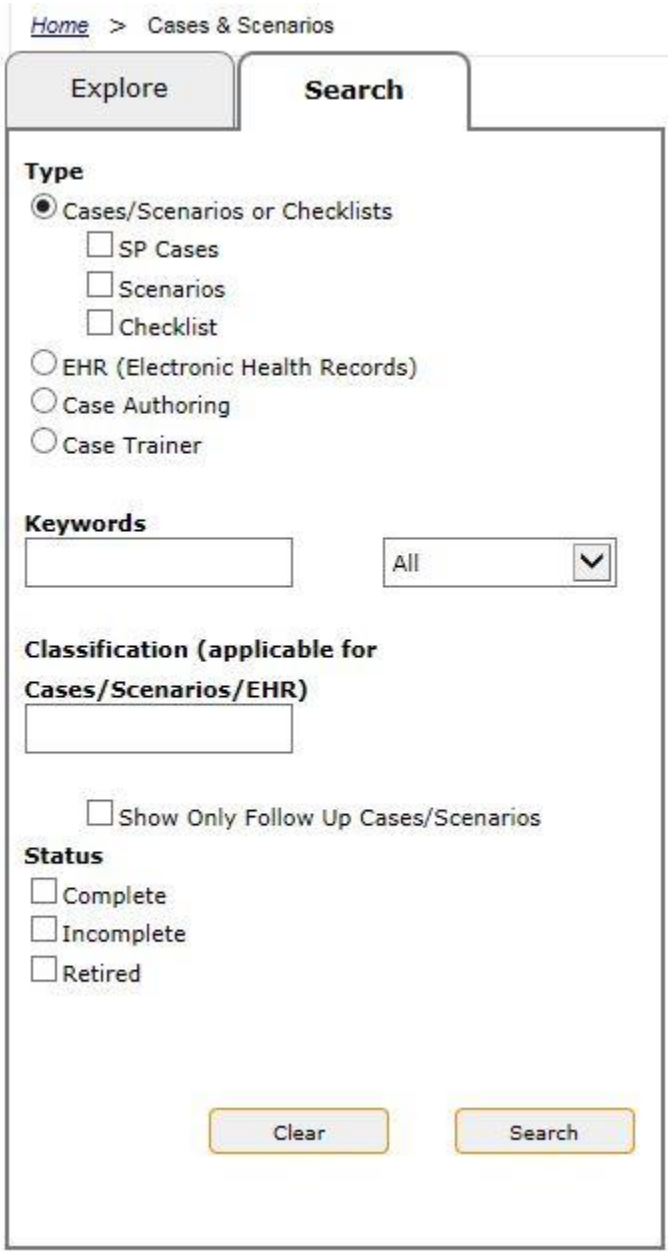


Enter the document name and due date and select a status of **Active**, **Retired**, or **Incomplete**.

You can also sort the grid data by clicking on the grid headings; you can also search by keywords within the grid for **Document Name**, **Due Date**, **Status**, and **Approval Status**.

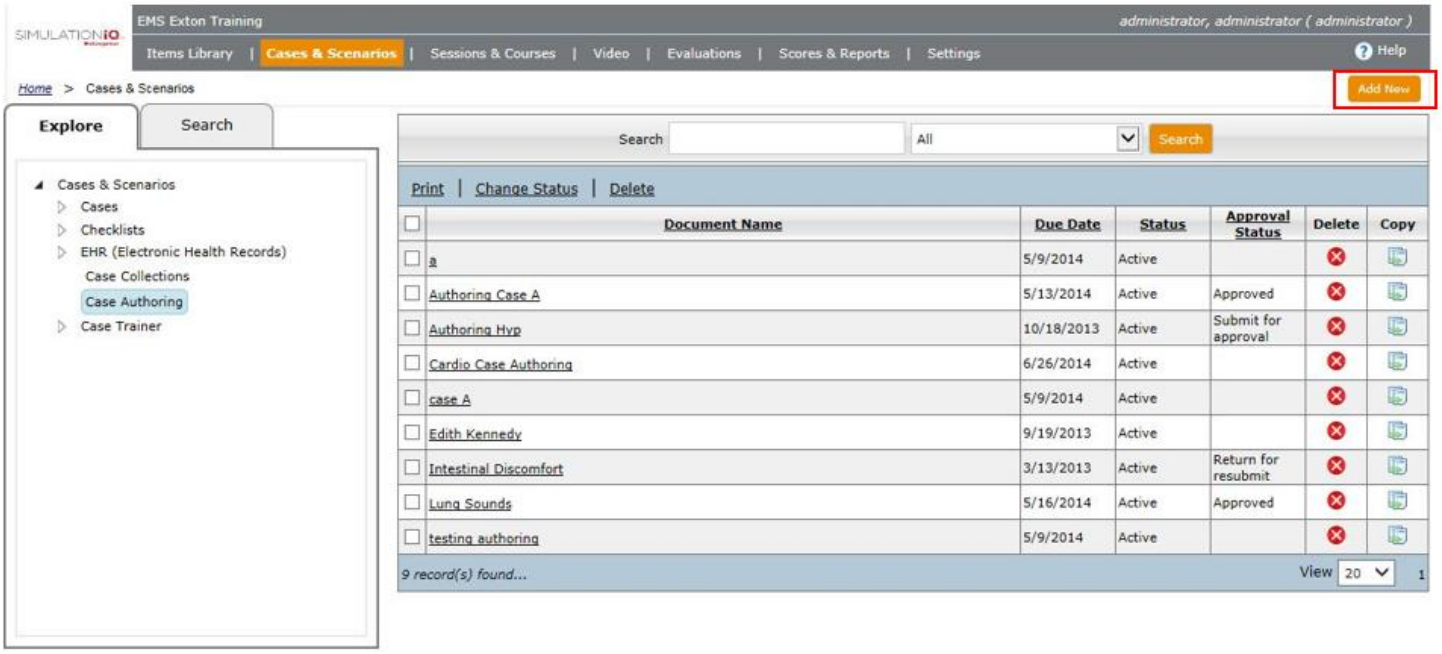
Searching within Cases and Scenarios

From the **Search** tab within the Cases and Scenarios module, click the **Search** tab to call up the following selections:



Search for Cases/Scenarios or Checklists and filter your search by clicking the SP Cases, Scenarios, or Checklist checkboxes. You can also search for EHR records as well as other Case Authoring documents.

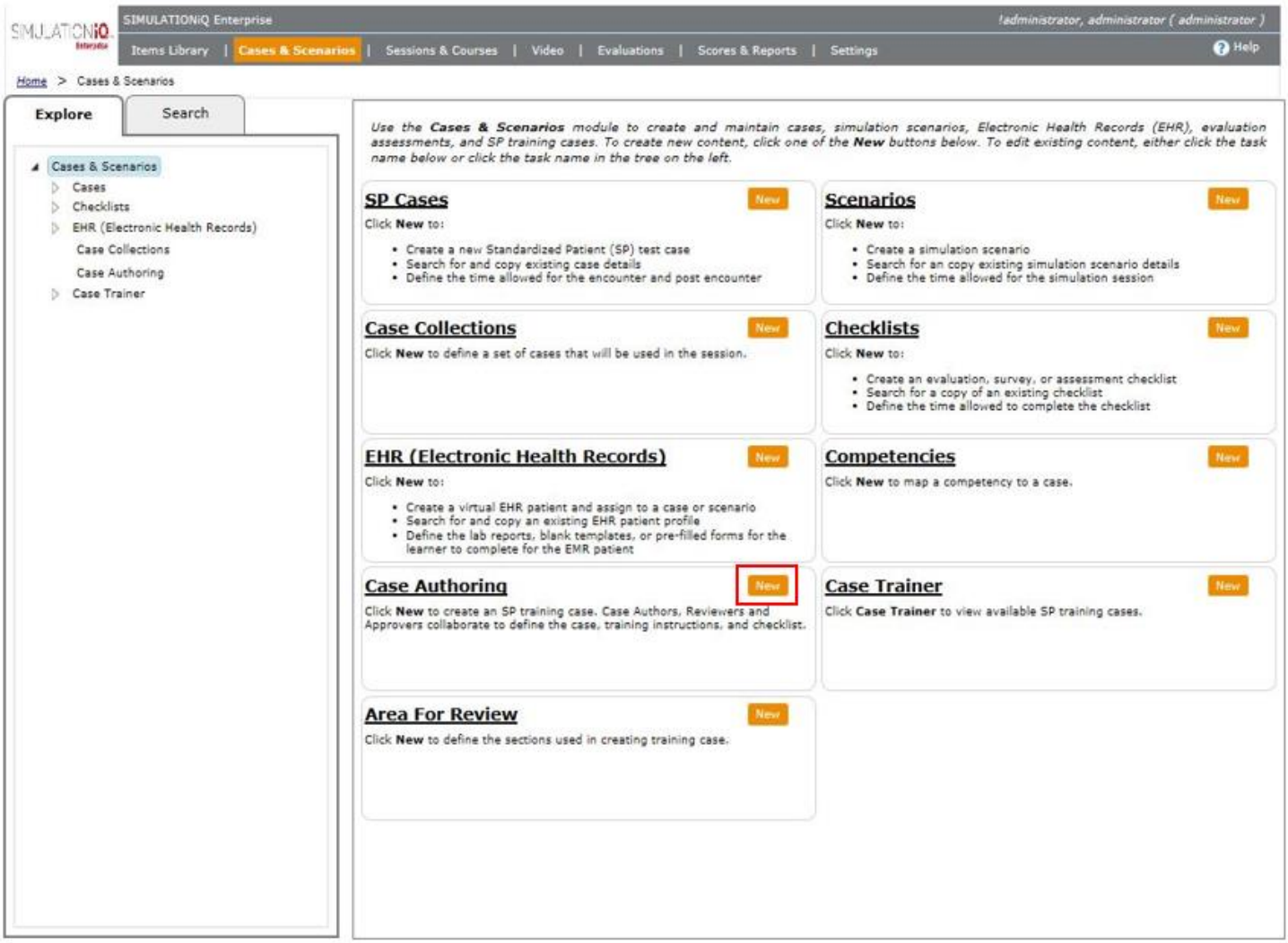
Add Keywords to search by **Name**, **Description**, **Case Title**, **Case Objectives**, and **Case Keywords**; you can filter by classification EHR records. Click the checkbox to show only follow-up cases/scenarios. Filter by **Complete**, **Incomplete** or **Retired** statuses by clicking the applicable checkboxes. Press Search after you have defined your search parameters (a sample grid of Case Authoring documents appears below).



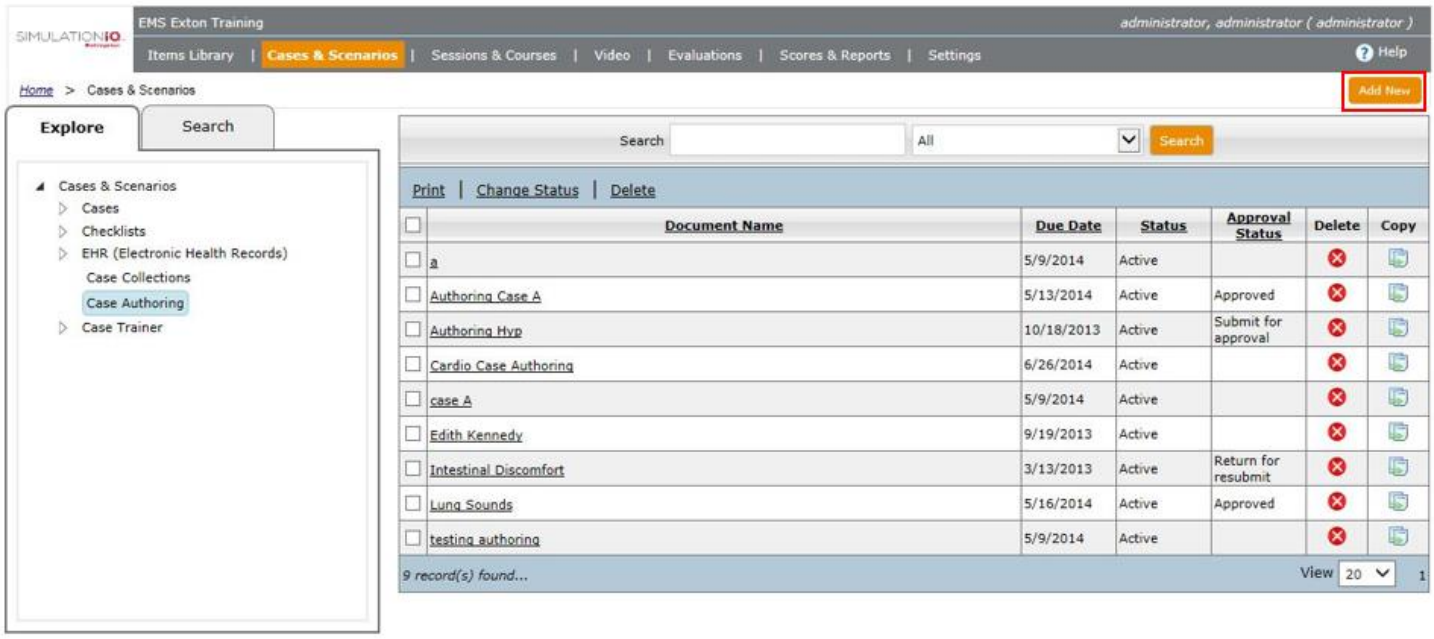
After clicking the document checkbox, you can print the document as a report or save it as an Excel file. You can also change the status to **Active**, **Retired**, or **Incomplete** or delete the document.

You can also sort the grid data by clicking on the grid headings; you can also search by keywords within the grid for **Document Name**, **Due Date**, **Status**, and **Approval Status**.

Creating a New Case Authoring Document

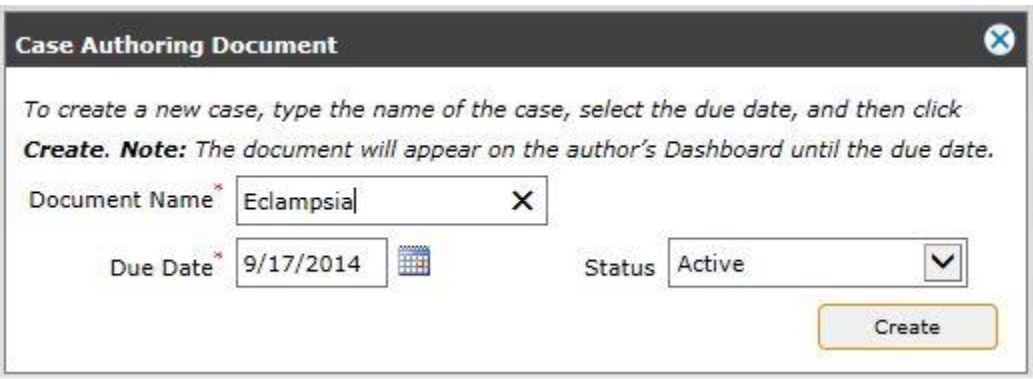


To author another training case, click the **New** button from the task bar either near the **Case Authoring** link on the Cases and Scenarios landing page or the **Add New** button from the Case Authoring landing page, as follows:



Note: If a Case Authoring document is deleted from the Case Authoring module but it is used within the Case Trainer, it is deleted within both Case Authoring and the Case Trainer (a warning appears stating that “This document is associated with a training case. Click OK to delete.”).

Click **New** from the Cases and Scenarios landing page or **Add New** from the Case Authoring landing page, and the following appears:



Enter a name for your Case Authoring session under **Document Name**, select a **Due Date** when the Case Authoring document will be due from the author, and select a Status of **Active, Retired**, or **Incomplete**.

After clicking **Create**, the Case Authoring Activity page appears; this page contains the following sections:

General Information

The General Information section contains the following fields:

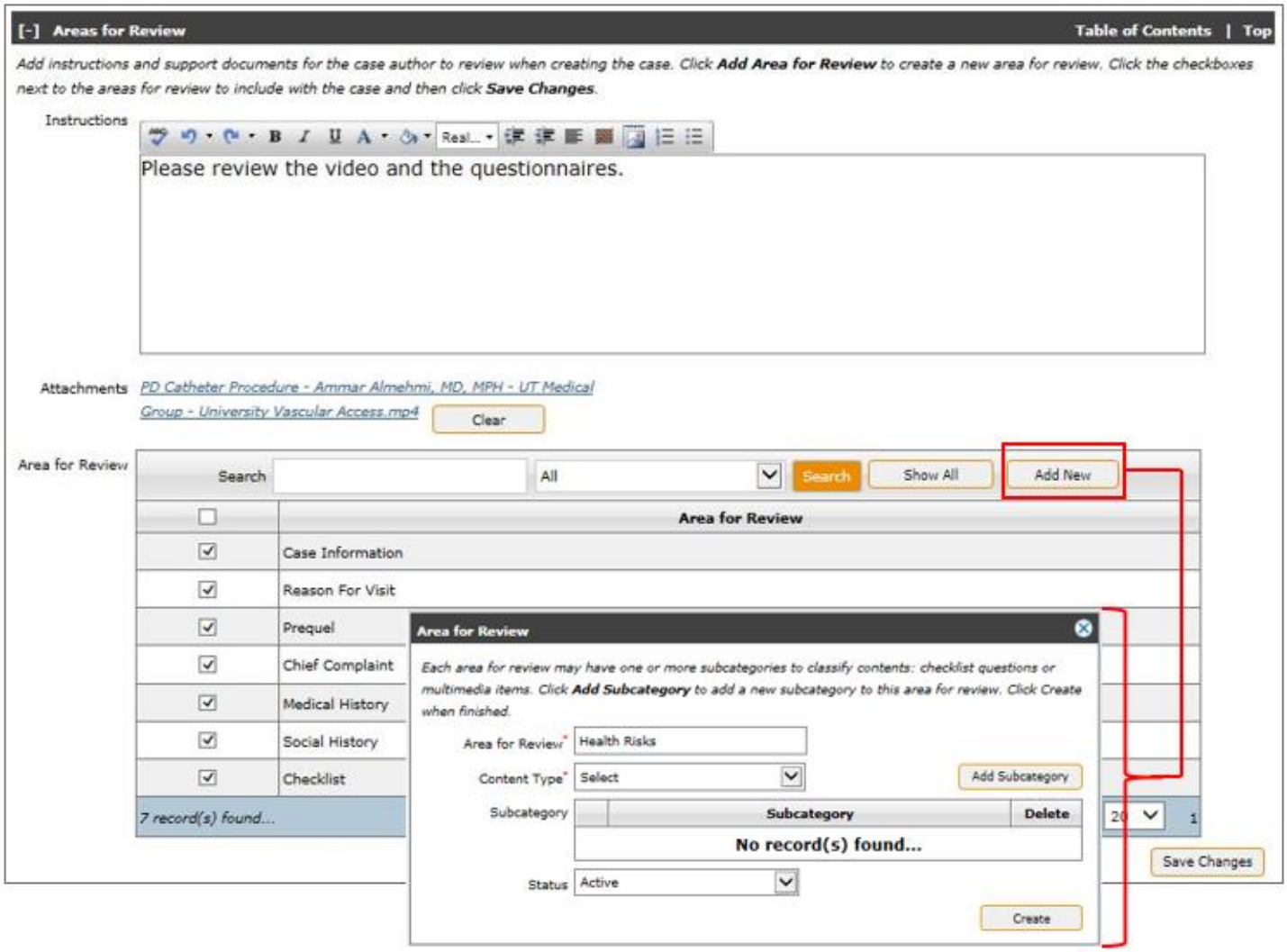
- **Document Name** – This is the Case Authoring document name entered when the document was created.
- **Expected Due Date** – This is expected date of the training case from the Case Author.
- **Status** – Select **Active**, **Retired**, or **Complete** from the drop-down list.

Press 

after making your selections.

Areas for Review

The Areas for Review section appears as follows:



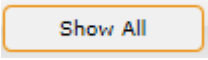
Enter the following information:

- **Instructions** – Add instructions and support documents for the case author to review when creating the training case.
- **Area for Review** – Select an existing area to be covered in the case authoring document or click **Add New** to add a new area for review, as shown.
- **Content Type** – Select either **Questionnaire** or **Documents**.

Click the checkbox next to any existing subcategories or press 

to call up the following:

Enter the Subcategory name and press **Save**. You can also change the Area for Review status to **Retired** (**Active** is the default). When you have finished subcategory details, press **Create**.

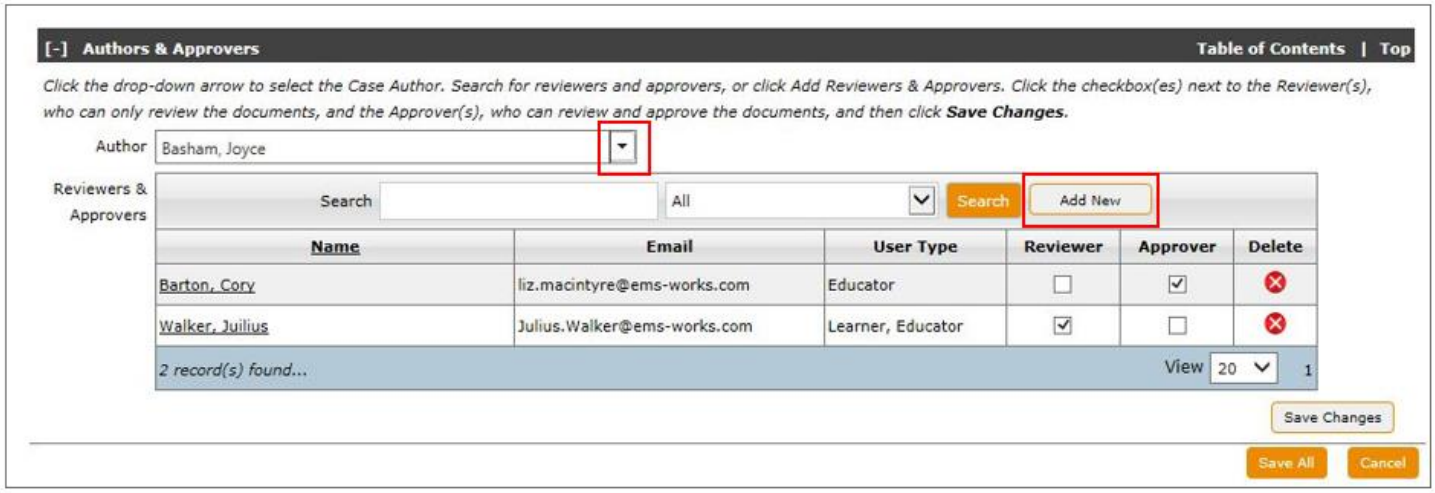
Click the 

button to display all categories on the grid (button toggles to Show Selected categories). Enter case instructions for Areas for Review in the Instructions text box. Browse for and upload any attachments to be included with the training case at the Attachments field, including videos and other support files.

An Area for Review can also be created within Case Trainer; see the Case Trainer topic for more information.

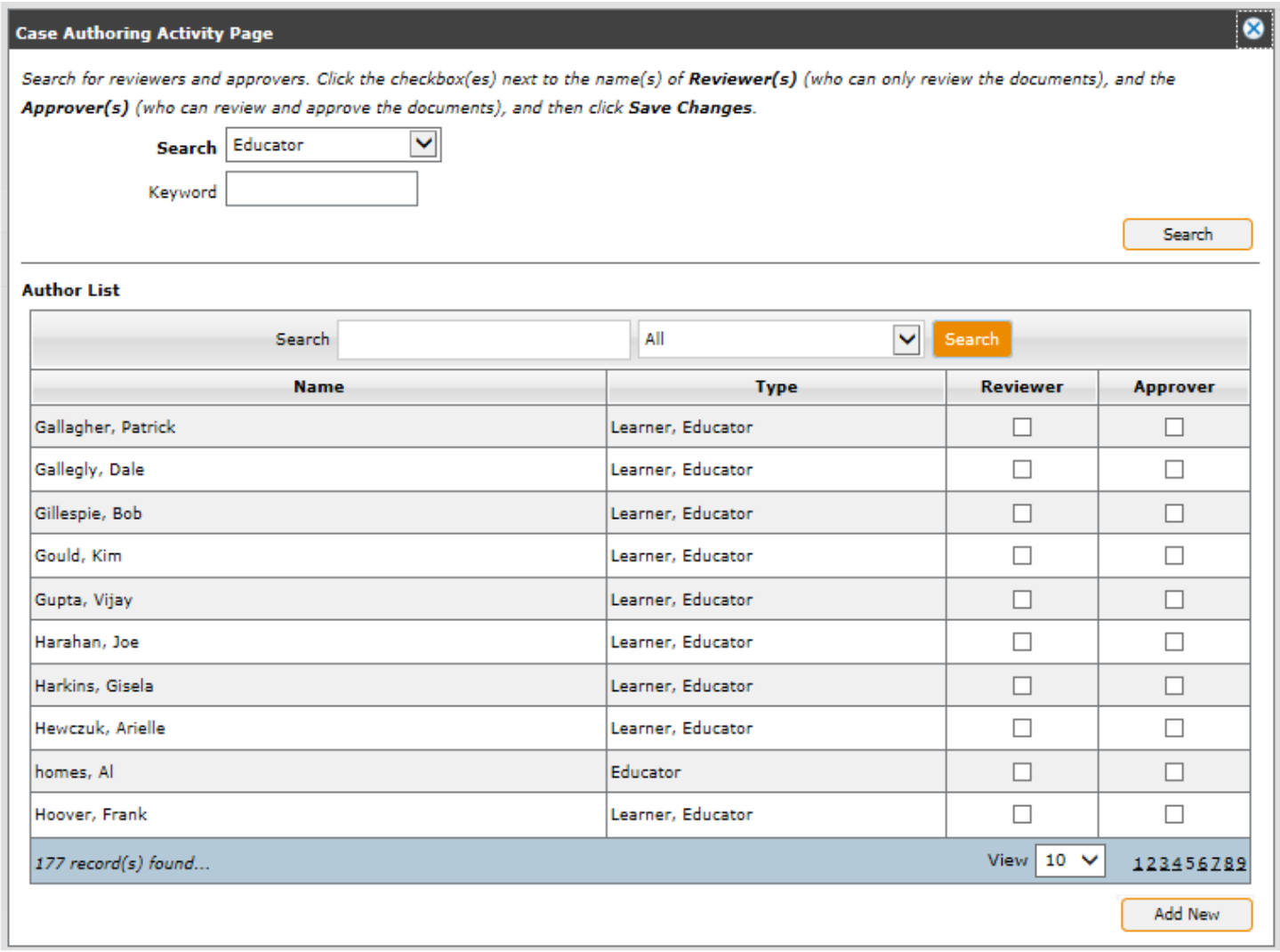
Authors and Approvers

The **Authors & Approvers** section of the Case Authoring Activity Page appears as follows:



Select an Author from the drop-down list of educators. The Author is not necessarily the person creating this Case Authoring page. The Author is the one who is responsible for creating the content of the Training Case.

For Reviewers & Approvers, click Add New to call up the following dialog (you can also enter a keyword to narrow your search):



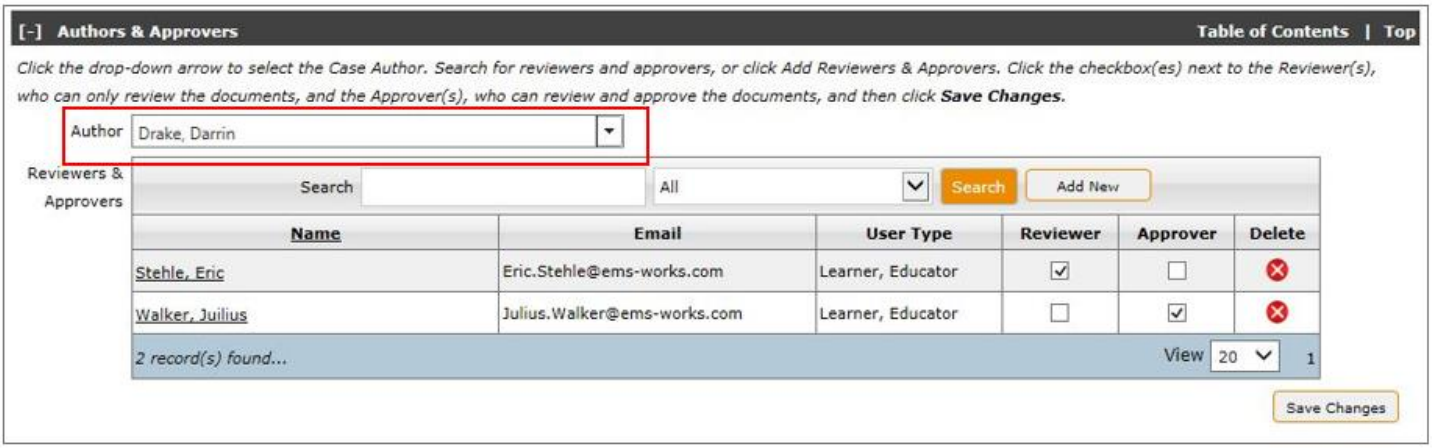
Choose your reviewers and approvers of the Case Authoring file by clicking the applicable checkboxes. The Reviewer will be reviewing the case and resubmit back to the case author. The Approver is the person approving the case for training distribution.

Press Add New to populate the Authors & Approvers grid.

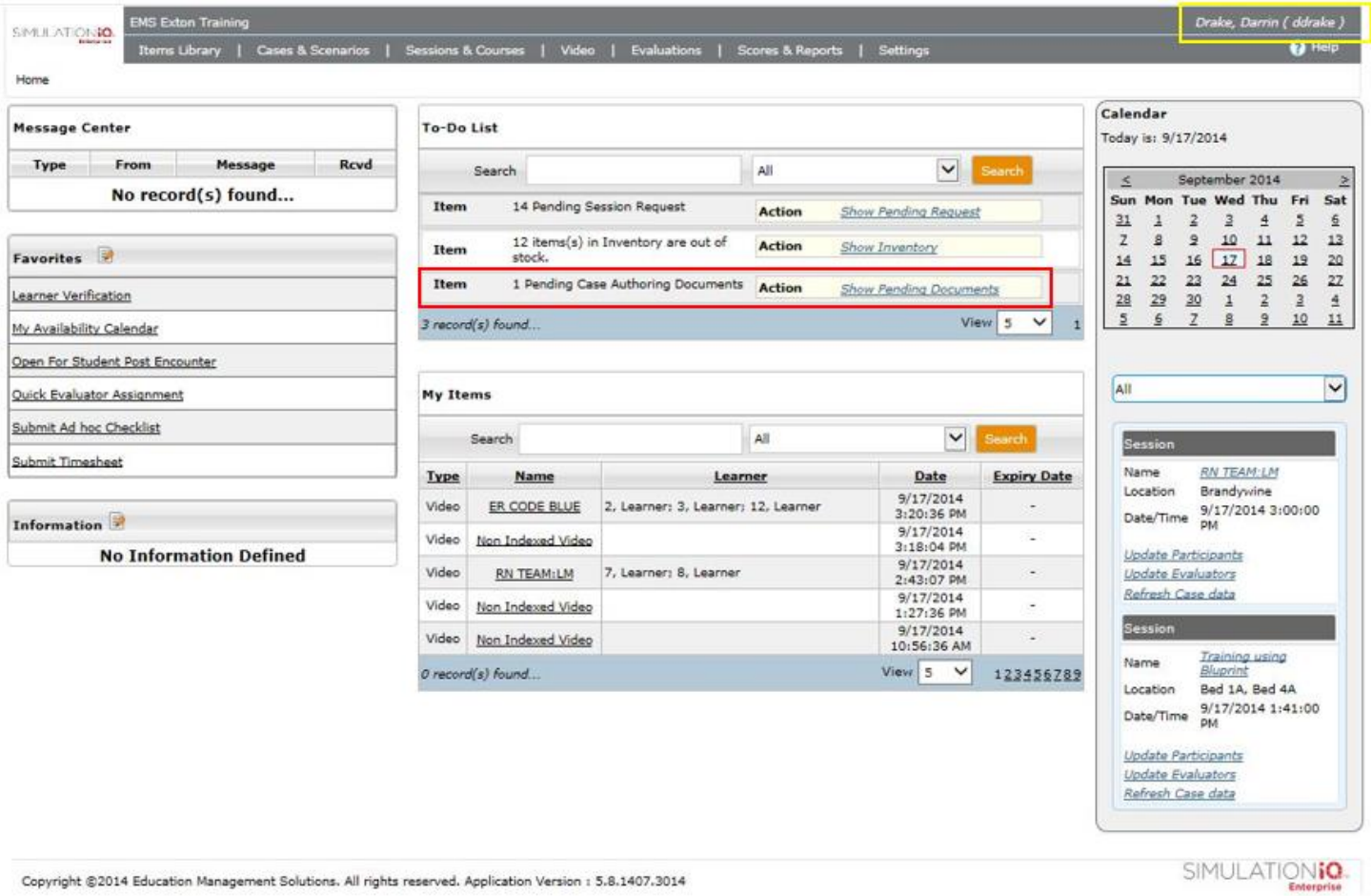
Press Save Changes and Save All to retain all screen selections.

Accessing the Case Authoring Document

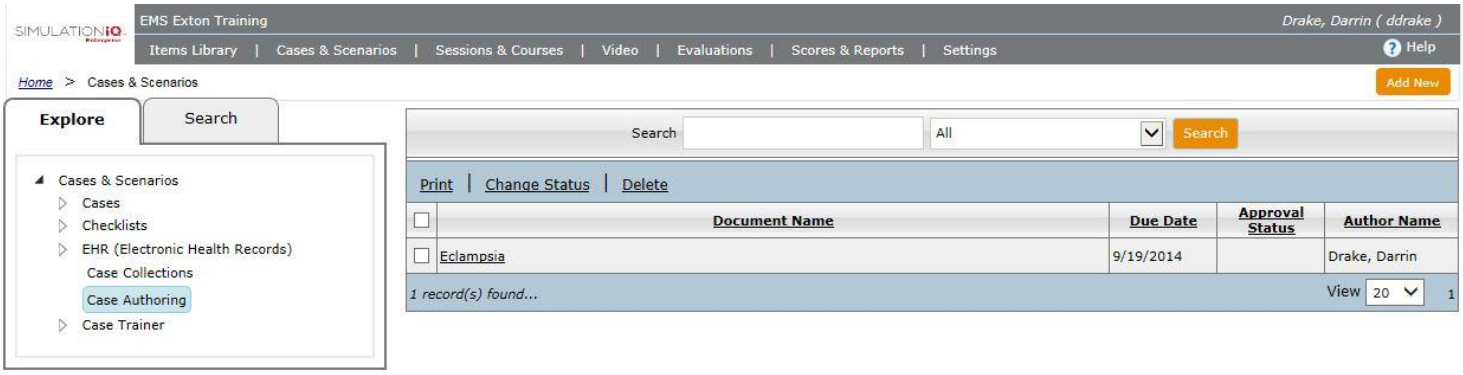
The following is a sample of a Case Authoring document by an author with designated reviewers and approvers (for the authored case "eclampsia"):



After the Case Authoring document has been saved, the Author, Reviewer or Approver can view the document upon logon at the dashboard (shown below).



The Author, Reviewer or Approver can click the Show Pending Documents link to view the following:



Click the **Document Name** to open the Edit Document view. From here, you can edit the reasons for the visit that initiates the training case, as well as viewing multimedia and image files associated with the training case.

Case Authoring Tool Belt

The Case Authoring Tool Belt appears as follows:

The following appears:

- **General Information** – This displays the activity page for the authored case.
- **Document History** – This provides a history of all edits and reviews of the training case document (click Post Comment to add a comment).

Case Trainer

Application Workflow

Case Trainer is designed to provide case details to the SP, Learner, or Educator for their self-study.

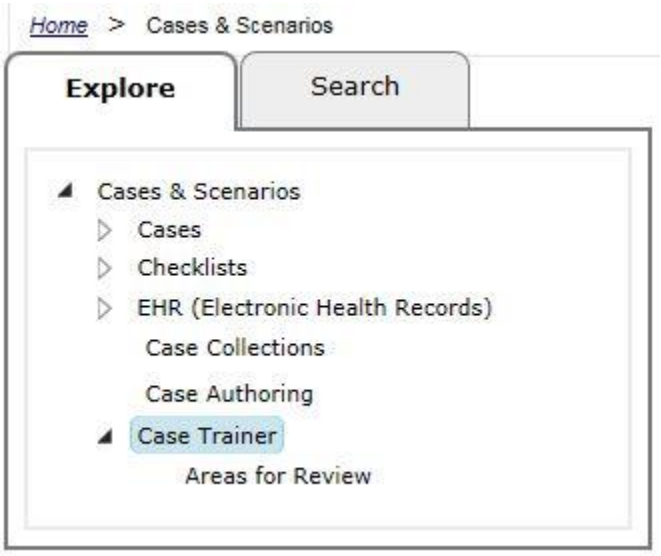
Cases may be created using a Q&A format with photo icons, video clips and comments to address learning styles or you may elect to upload a document or PowerPoint presentation if you prefer. Training cases can also be generated from Case Authoring documents.

As the case is being developed, trainer questions or comments about the case may be inserted.

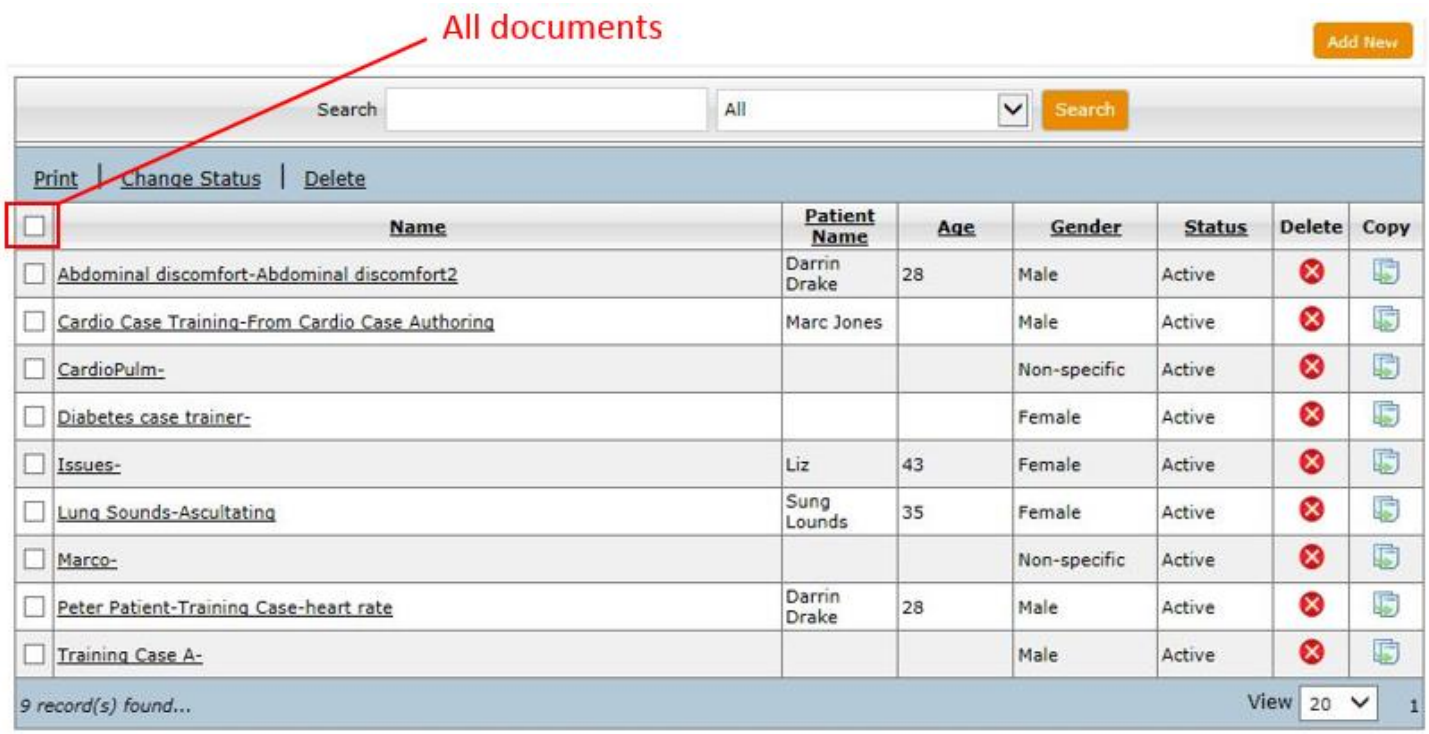
The administrator and the Case Trainer take the reviewed case and create different checklists for the SP case and populate training details. The case is then submitted for approval. SIMULATIONiQ Enterprise sends out a dashboard notification to all approvers and locks the case so that no one can edit the case until it is rejected or approved.

Search for Case Training Cases

The Case Training selection appears from the Cases and Scenarios Explore tab as follows:



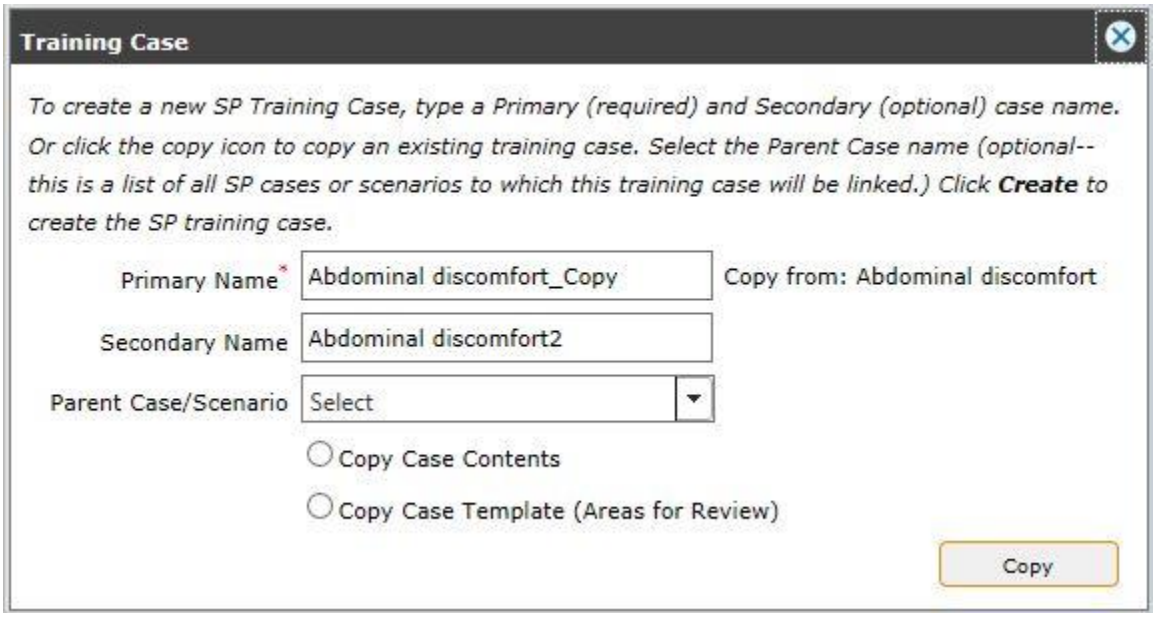
Click the Case Trainer link; the following grid appears:



To highlight a document in the grid, click the checkbox next to the document name or click the checkbox in the upper left corner to highlight all documents. You can also click a link from the grid under **Name**; this opens the Activity page displaying details for the training case.

After clicking one or more document checkboxes, you can print a document or save it as an Excel file. You can also change the status to Active or Retired; you can also copy or delete one or more documents (delete functionality is also available by clicking for a checked document).

Click the icon for a checked document to call up the following:



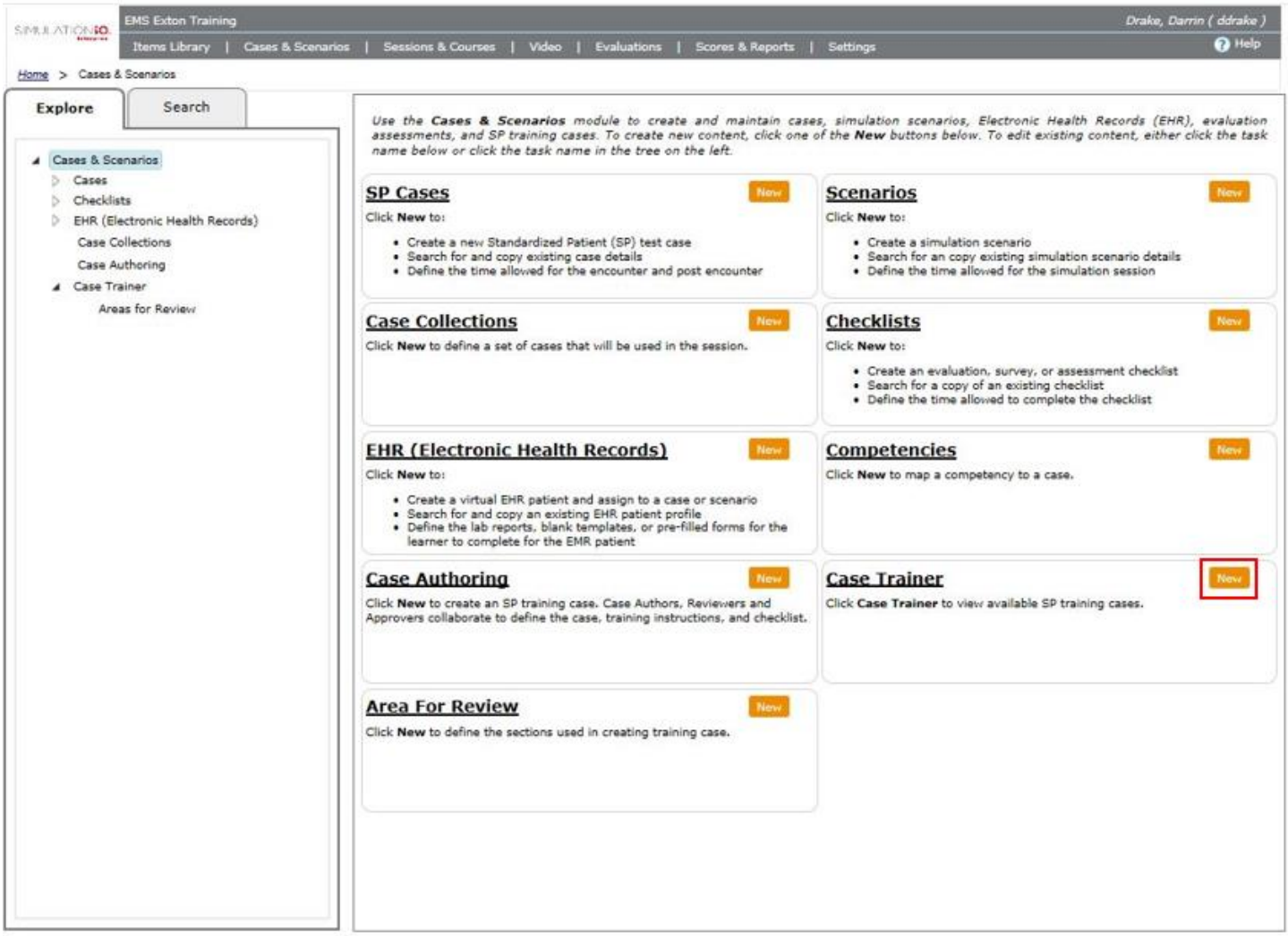
Enter the **Primary Name** of the case to be copied (this is a required field). You can also enter a **Secondary Name** to further distinguish the case from other cases. Select a **Parent Case** if the training case has a dependency to another case.

Select either **Copy Case Contents** or **Copy Case Template (Areas for Review).** Click **Copy** when finished; this populates the copied case on the grid.

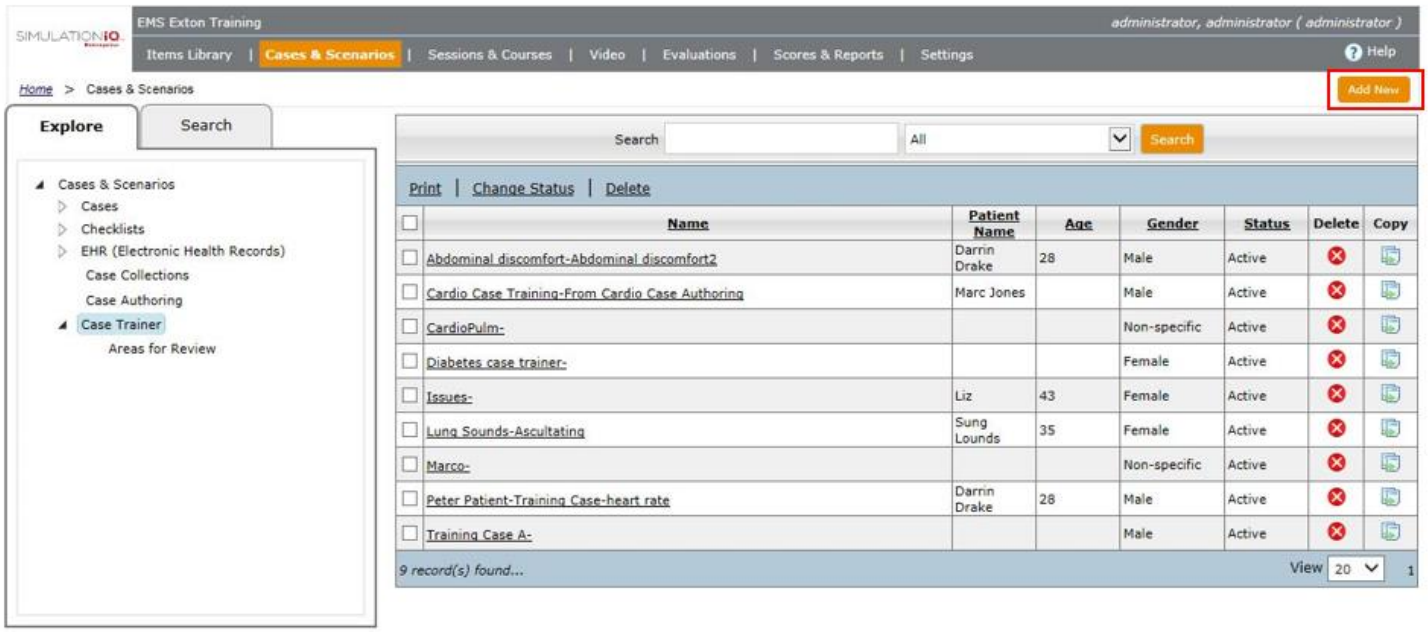
You can also sort the grid data by clicking on the grid headings; you can also search by keywords within the grid for **Name**, **Patient Name**, **Age**, **Gender**, or **Status**.

Creating a New Training Case

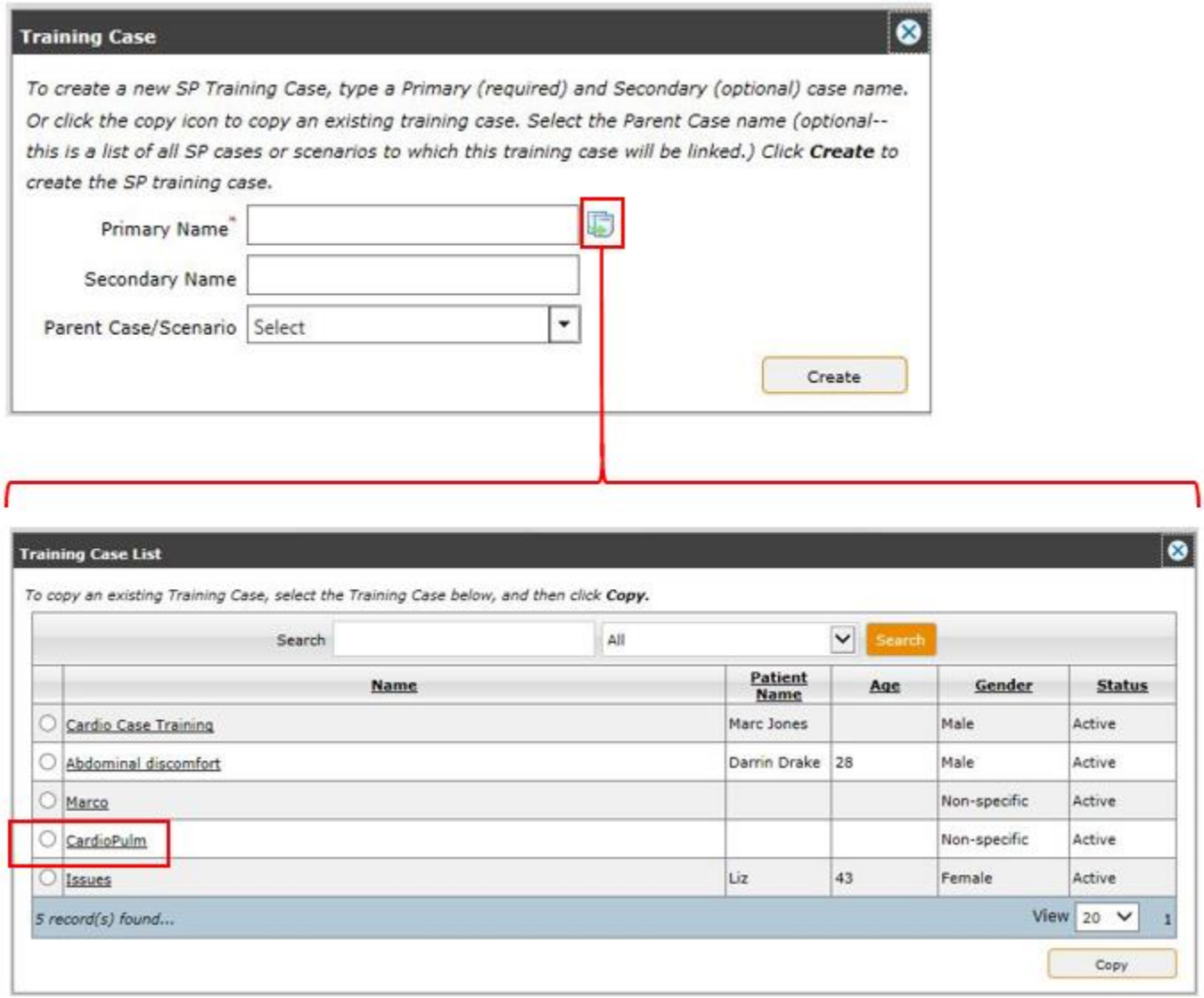
To create a new training case, click the **New** button from the task bar near the Case Trainer link on the Cases and Scenarios landing page, as follows:



You can also click **Add New** from the Case Trainer landing page, as follows:



After making either selection, the following appears:



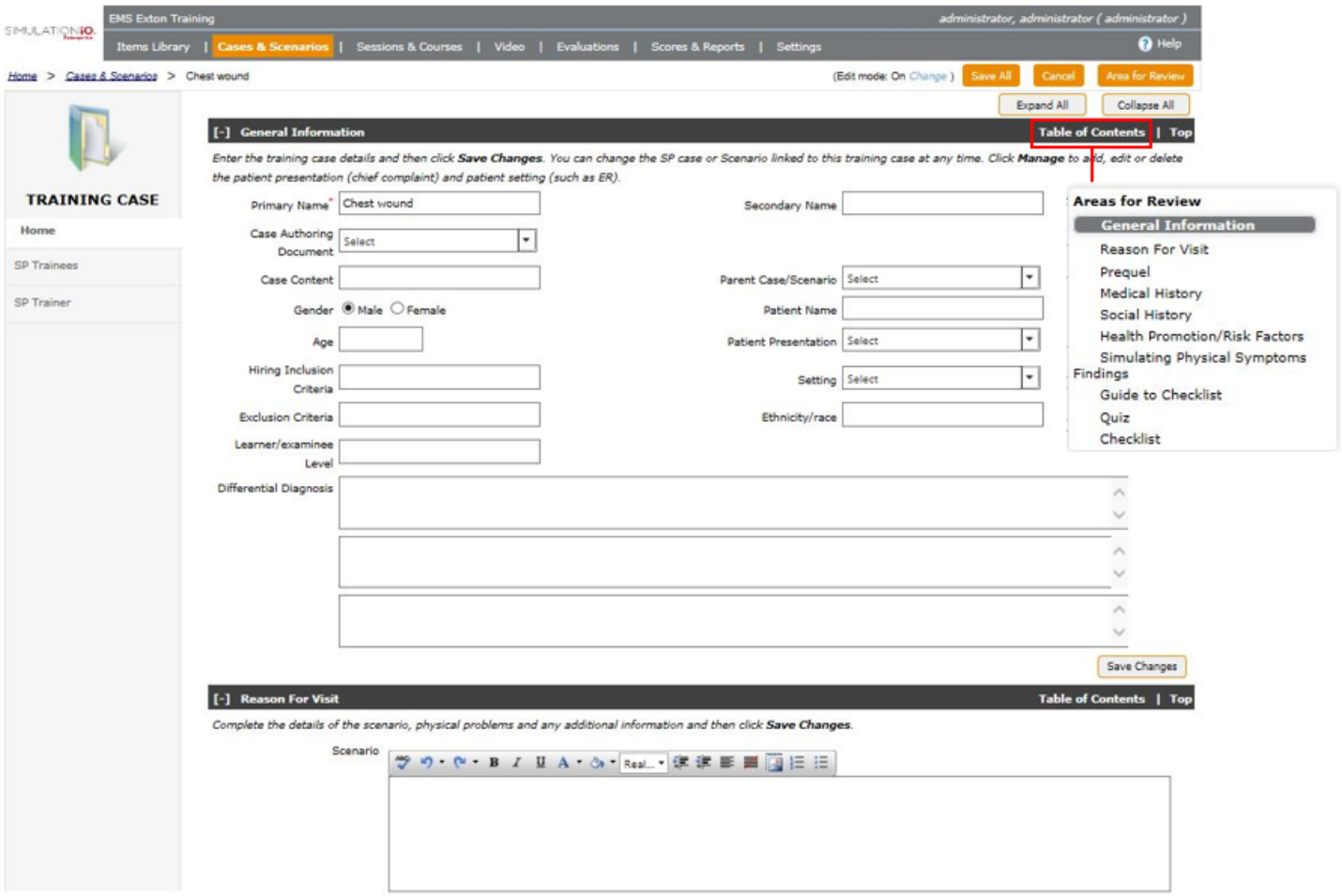
Enter a **Primary Name** (required) and a **Secondary Name** (optional) for the training case. You can also select a Parent Case already created to associate it with this training case.

You can also click the **Copy** icon as shown to link the new training case to an existing training case. Select a case from the grid by clicking the radio button.

The following appears at the Training Case dialog:

From here, you can either copy the contents of the existing training case or select the Case Template only (the Area for Review section) by clicking the desired radio button.

After you have made your selection, click **Create**. The activity page appears for this training case as shown.



Click the blue **Change** text next to the **Edit mode** selection in the upper right corner to enable or disable editing on the Case Trainer page. After saving changes within each section of the page, click Save All to retain your selections or Cancel to remove them. Click Expand All to open all page sections or Collapse All to close all page sections.

Press the Area for Review button to call up the following dialog:

Area for Review

*Click the **Include** checkbox to include areas for review and select the order in which the areas should be presented. To remove an area for review, uncheck the **Include** checkbox. Click **Save**. If a section is not added in the case trainer, then the order drop-down will not be shown.*

Add

Include	Order	Area for Review	Content Type	Status
	1	Case Information	Questionnaire	Active
	2	Reason For Visit	Questionnaire	Active
☐		Checklist	Questionnaire	Active
☐		Chief Complaint	Questionnaire	Active
☐		Doc	Documents	Active
☐		Guide to Checklist	Questionnaire	Active
☐		Health Promotion/Risk Factors	Questionnaire	Active
☐		Medical History	Questionnaire	Active
☐		Prequel	Questionnaire	Active
☐		Quiz	Questionnaire	Active
☐		Simulating Physical Symptoms Findings	Questionnaire	Active
☐		Social History	Questionnaire	Active
☐		SP Training Directions	Questionnaire	Active
☐		Symptoms	Questionnaire	Active
☐		symptoms of ailment	Questionnaire	Active

15 record(s) found... View 20 1

Save

From here, select **Areas for Review** for your training case. It is recommended that, if you link to a Case Authoring document, you select the same Areas for Review here as selected at the Case Authoring document.

Under Content Type for your Area for Review, **Questionnaire** appears by default. If you change your default selection to **Documents**, a message appears stating all the information, questions & answers that have been created in this area will be disabled if the content type is changed.

Press **Save** to retain your selections (you can also change the sort order by clicking the drop-down arrows; the Areas for Review are resorted automatically).

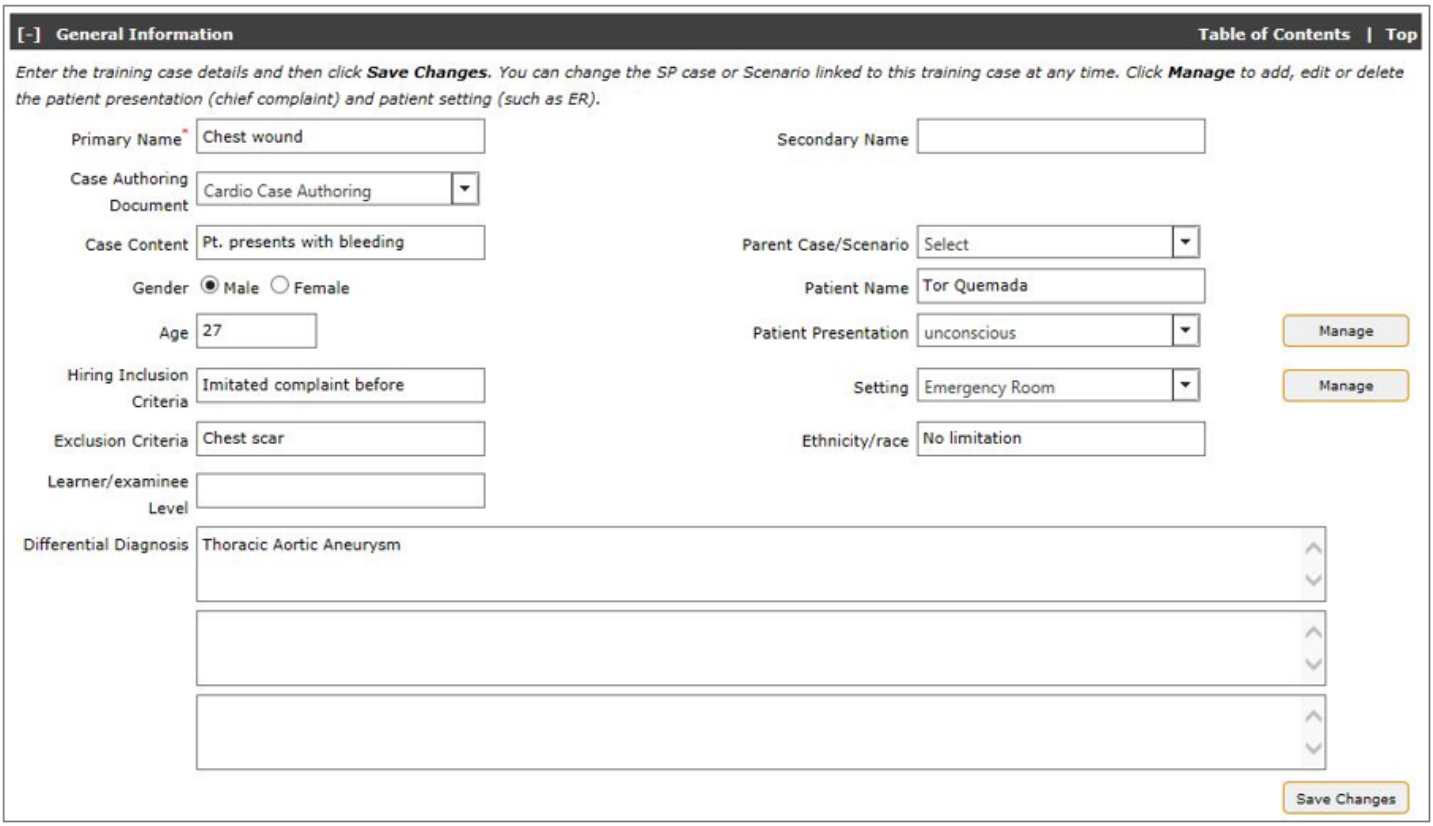
The following sections appear on this page (depending on your Area for Review selections):

- General Information
- Reason for Visit
- Prequel
- How to Fill Out the Checklists
- Chief Complaint
- Medical History
- Social History
- Health Promotion/Risk Factors
- SP Training Directions
- Simulating Physical Symptoms Finding
- Guide to Checklist
- Quiz
- Checklist
- Symptom Frequency

General Information

Click **Expand All** to open every section on this page and **Collapse All** to close all sections.

The **General Information** section appears as follows:

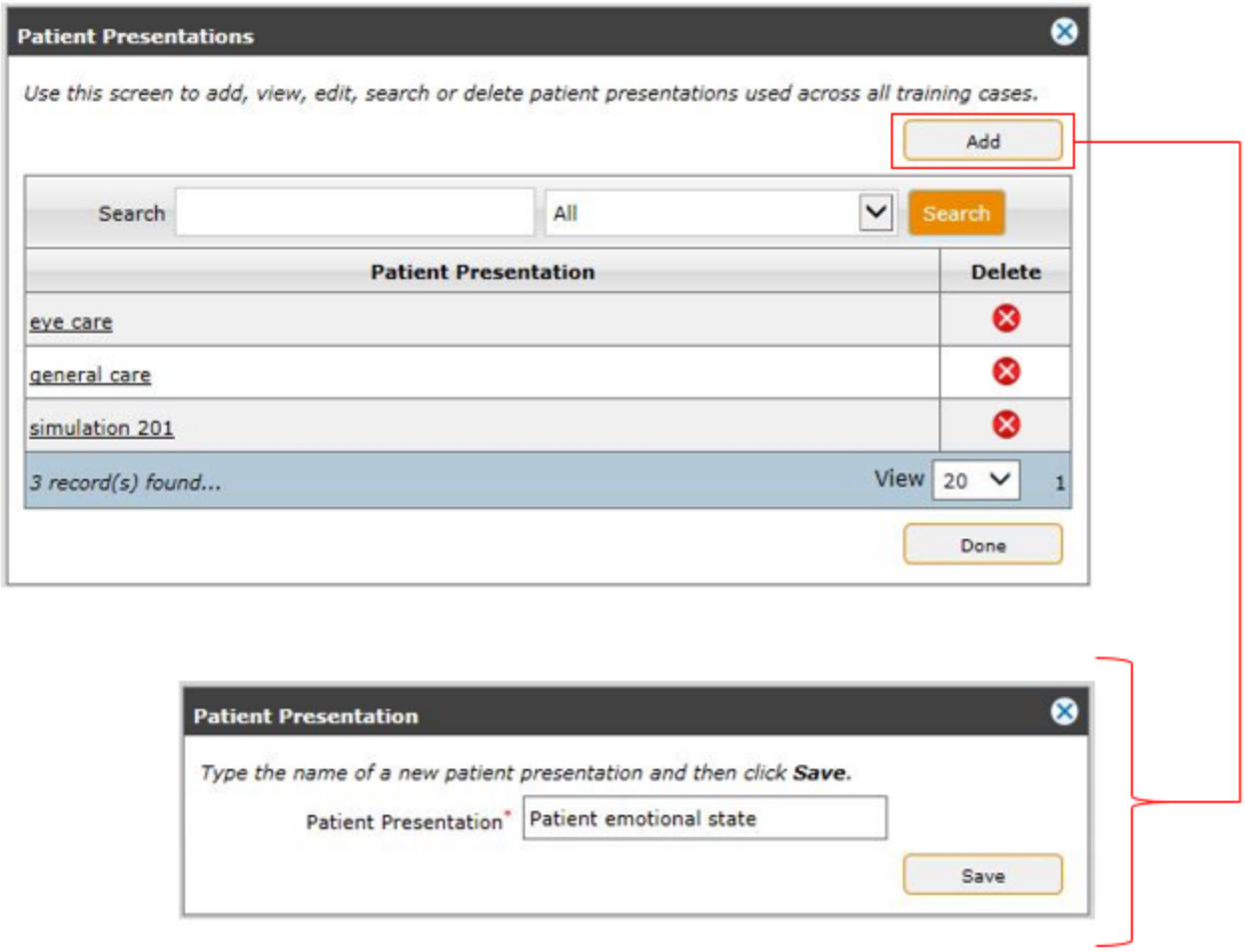


Enter the following in this section:

Field	Description
Primary Name*	Enter the case name reflecting the primary medical complaint (e.g., Acute GI).
Secondary Name	Enter the secondary name to distinguish multiple training cases from a single case (e.g., 20-year-old male experiencing Acute GI)
Case Authoring Document	If desired, select the Case Authoring document upon which this training case is based. Linking to this document pulls in General Information, Areas for Review, and Authors and Approvers from the Case Authoring document.
Case Content	Enter a brief description of the training case.
Gender	Select the gender of the patient.
Age	Enter the age of the patient.
Hiring Inclusion Criteria	Enter any reason for including the SP as a patient in this case (e.g., knowledge of patient complaint).
Hiring Exclusion Criteria	Enter any reason for excluding the SP as a patient in this case (e.g., obvious abdominal scar for an Acute GI case).
Learner/Examinee Level	Enter the level or the learner or examinee for this case. For example, if the training case is intended for a beginning or intermediate-level learner, that should be documented here.
Parent Case	Select a parent case if desired.

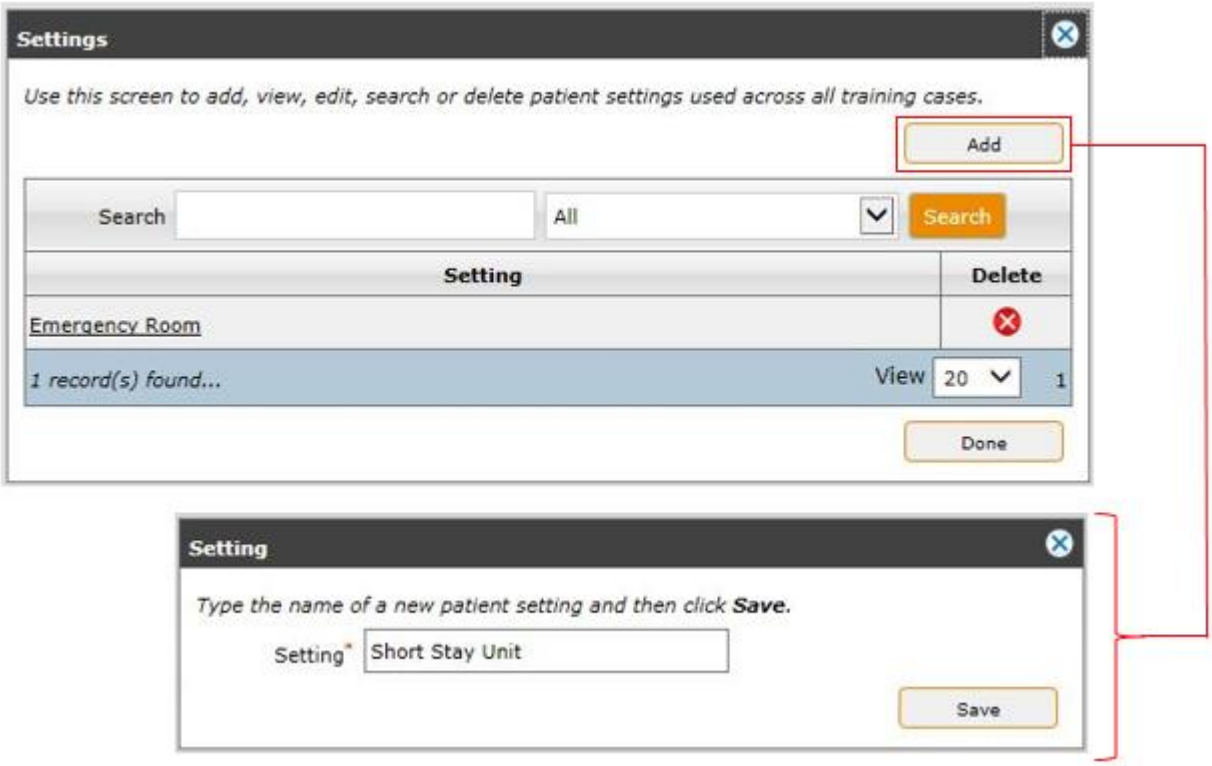
Patient Name	Enter the patient name at this field.
Patient Presentation	Select a patient presentation characteristic.
*- required field	

Click the **Manage** button to add another patient presentation characteristic or delete an existing characteristic, as shown below (you can also enter a search term to find a characteristic within the grid). Press **Done** when you are finished.



Field	Description
Setting	Select a case setting (e.g., Emergency Room).

Click the **Manage** button to add another setting or delete an existing setting, as shown below (you can also enter a search term to find a setting within the grid). Press **Done** when you have finished.



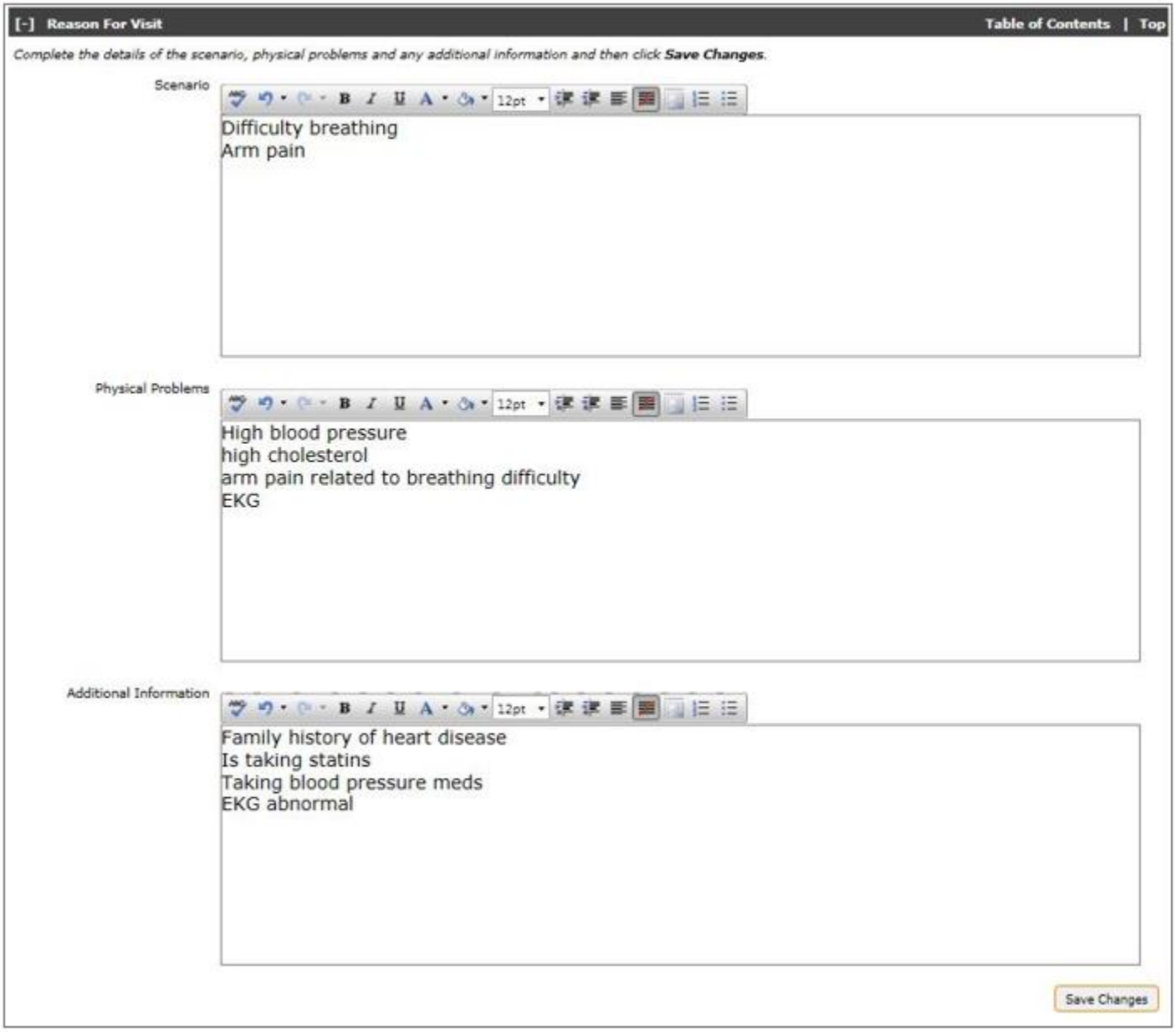
Field	Description
Ethnicity/race	Enter the ethnicity or race of the SP.
Differential diagnosis	In a case where multiple diagnoses are possible, enter the most urgent diagnosis first and list lesser diagnoses by priority, for example (a maximum of three are allowed): 1) Appendicitis 2) Irritable bowel 3) Diverticulitis

Press **Save Changes** to retain the information at this section.

Reason for Visit

Note: If a Case Authoring document is associated with this training case, any documents associated with it appear at this section.

The **Reasons for Visit** section appears as follows:



Enter the following in this section:

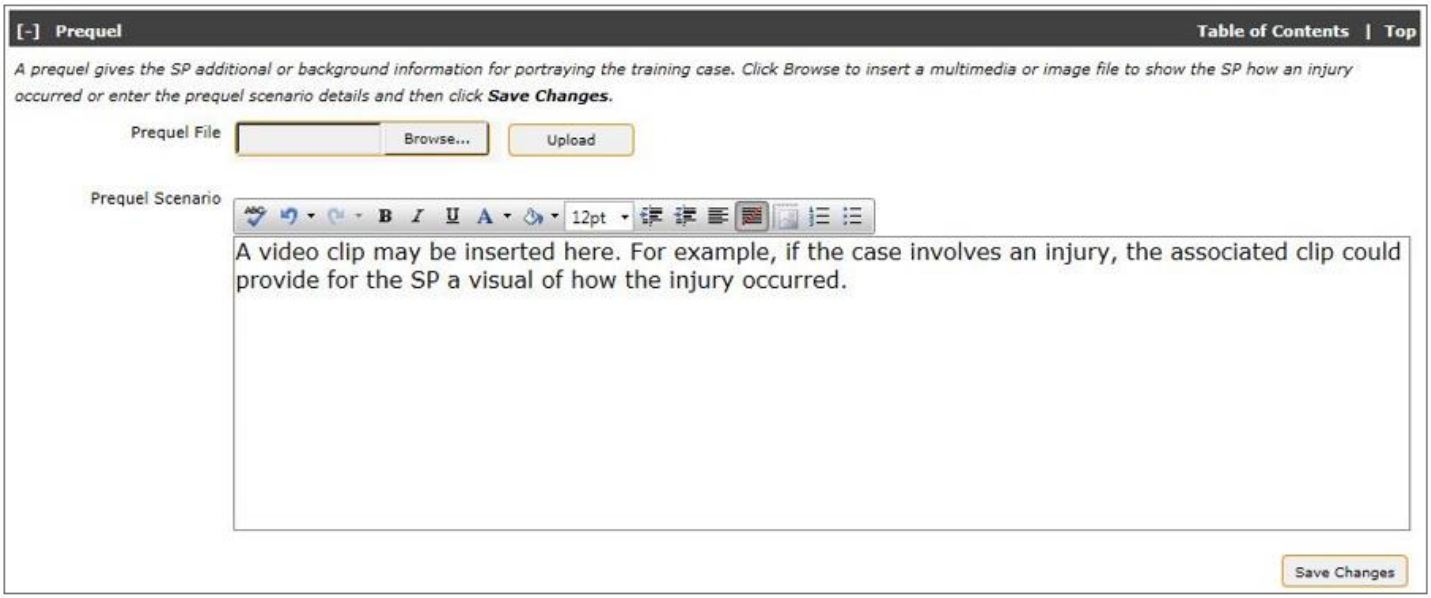
Field	Description
Scenario	Enter a description of the scenario.
Physical Problems	Enter any physical characteristics that accompany the complaint.
Additional Information	Enter any other background information relevant to the complaint.

Press **Save Changes** to retain the information at this section.

Prequel

Note: If a Case Authoring document is associated with this training case, any documents associated with it appear at this section.

The **Prequel** section appears as follows:



Enter the following in this section:

Field	Description
Prequel File	Add any supporting documents, images, or multimedia files to give the standardized patient a synopsis of activities or events for which they are being seen. Click the **Upload** button to attach files to the prequel portion of the training case.
Prequel Scenario	Enter background details leading up to the complaint portrayal by the SP (e.g., if the SP is portraying complications from diabetes, part of the history could be the death of a family member suffering from similar symptoms, which necessitated the visit).

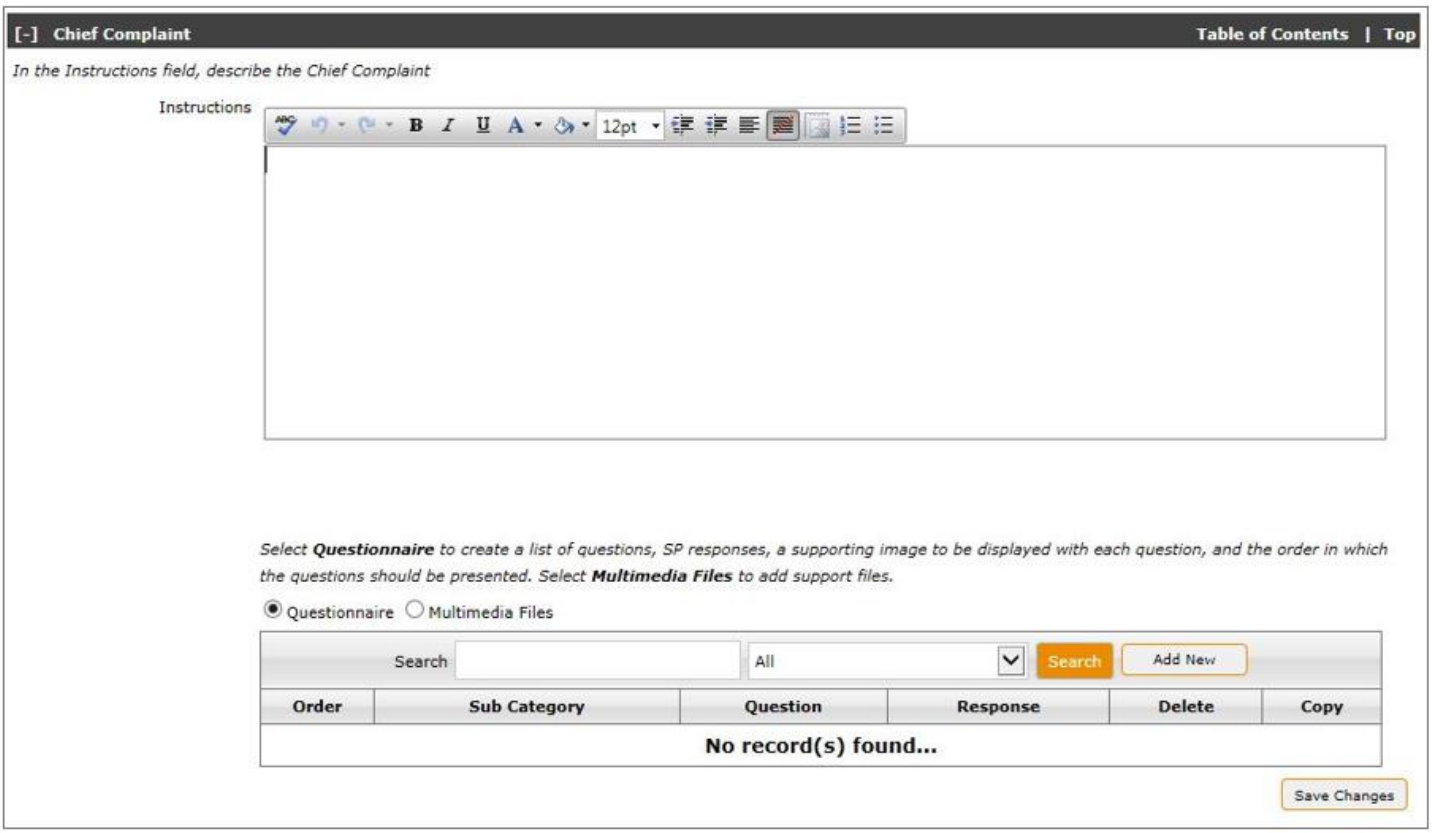
Note: An additional multimedia file (labeled as Prequel File) can be uploaded to this section.

Press **Save Changes** to retain the information at this section.

Chief Complaint

Note: If a Case Authoring document is associated with this training case, any documents associated with it appear at this section.

The **Chief Complaint** section appears as follows:



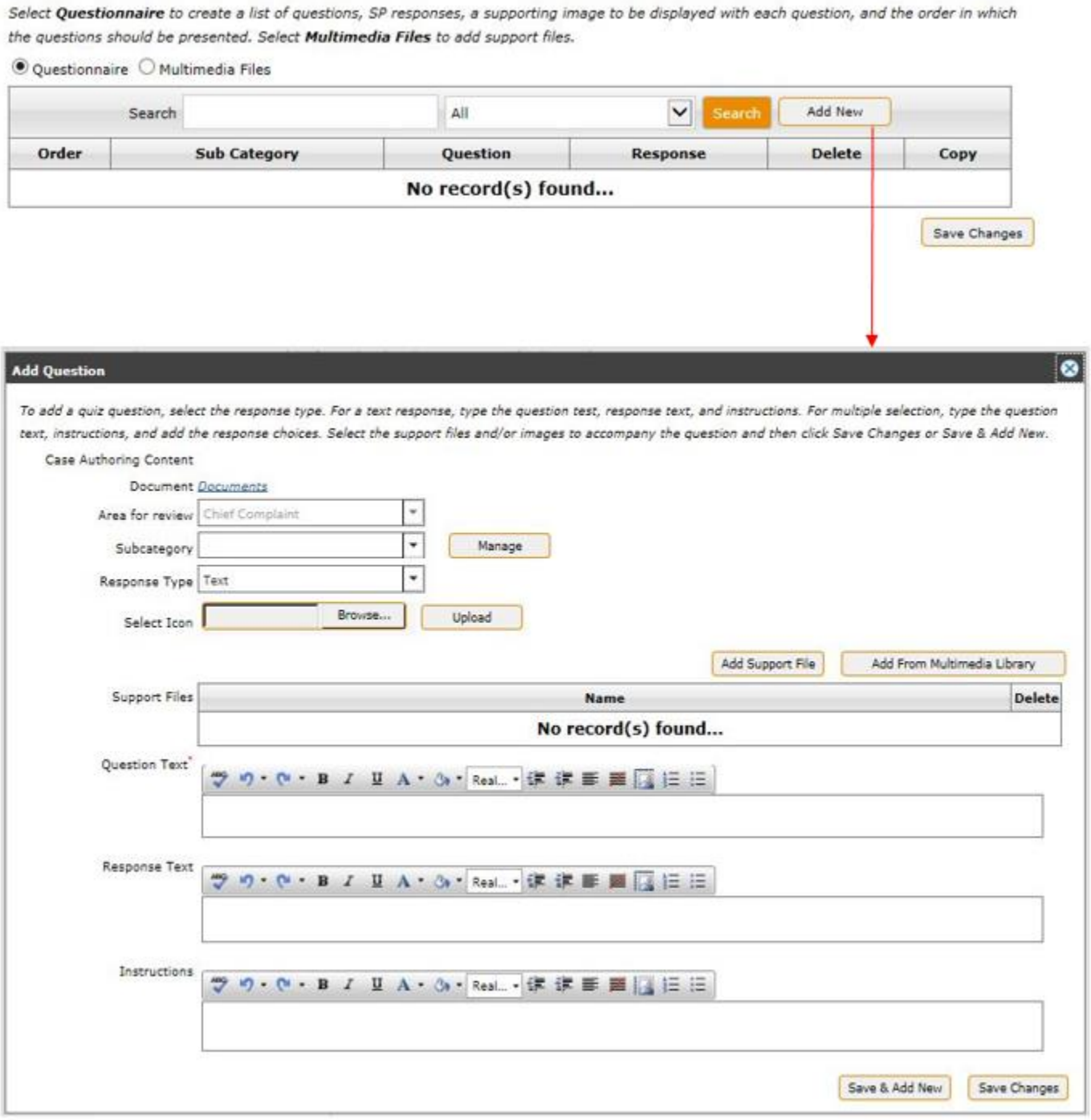
Enter the following in this section:

Field	Description

Instructions	Enter the SP instructions needed to portray the chief complaint.
Questionnaire/ Multimedia Files	Attach a multimedia file to assist the SP's portrayal of the complaint or a questionnaire to be used for diagnosing the complaint.

Questionnaire

A questionnaire can be attached to the chief complaint as follows:

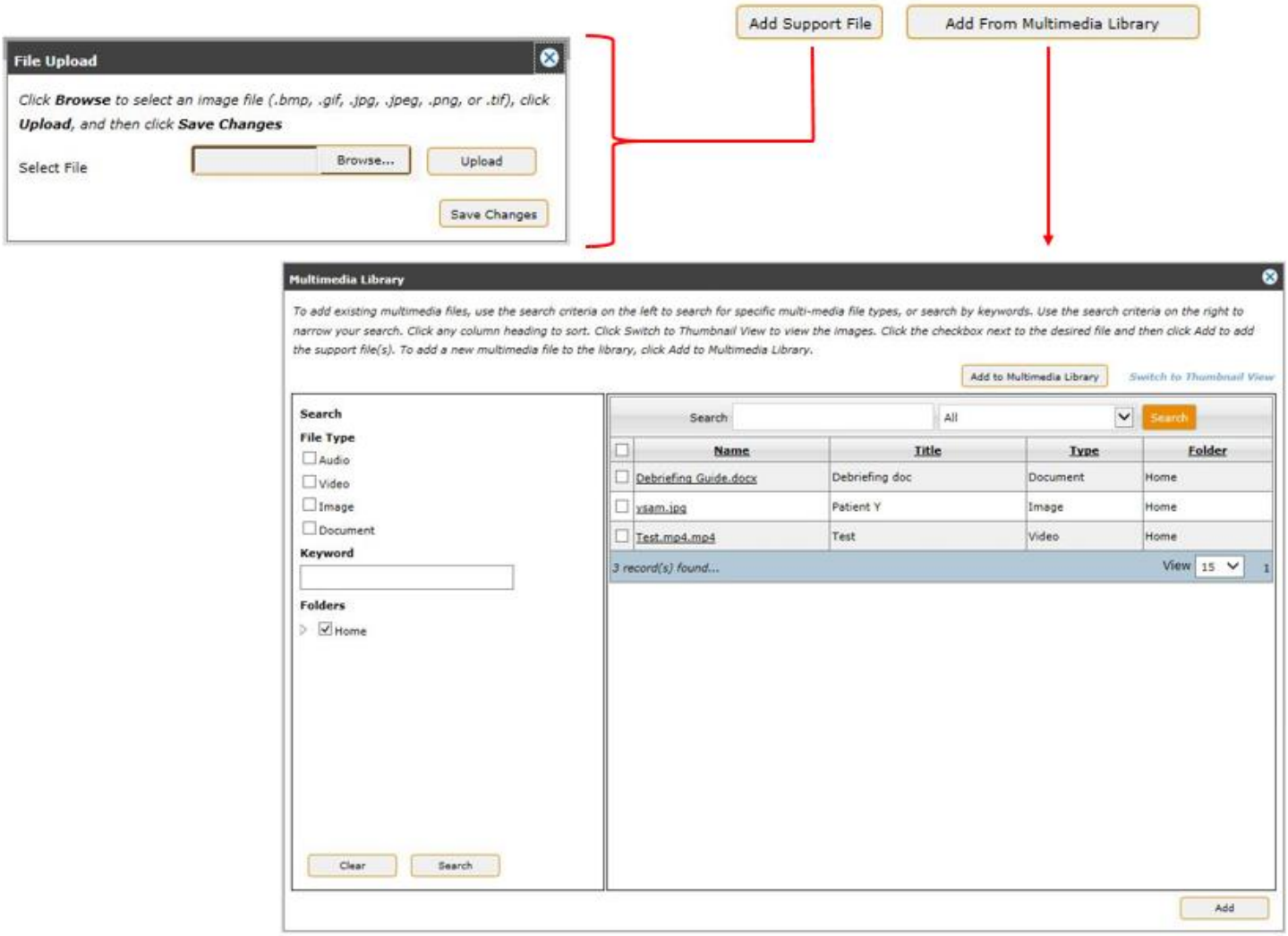


Note: Image altered for presentation purposes.

Enter the following information:

Field	Description
Area for Review	The current area for review (**Chief Complaint**, **Social History**, etc.) will be displayed.
Sub Category	Create a sub category if desired, such as HPI (History of Present Illness) or ROS (Review of Systems) under medical categories such as **Chief Complaint** or **Medical History**.
Response Type	This defaults to Text when adding a question to the training case.
Select Icon	Upload an icon from the multimedia library for use with a question and answer for easier recall by the SP.
Support Files	Add multimedia support files to illustrate points for the standardized patient.
Question Text	This is the anticipated question posed by the learner.
Response Text	This is the information the SP will learn and use when responding to the student.
Instructions	Enter a summary of the overall complaint (e.g., breathing problems)

From within the questionnaire selection, a multimedia file can be attached as follows:



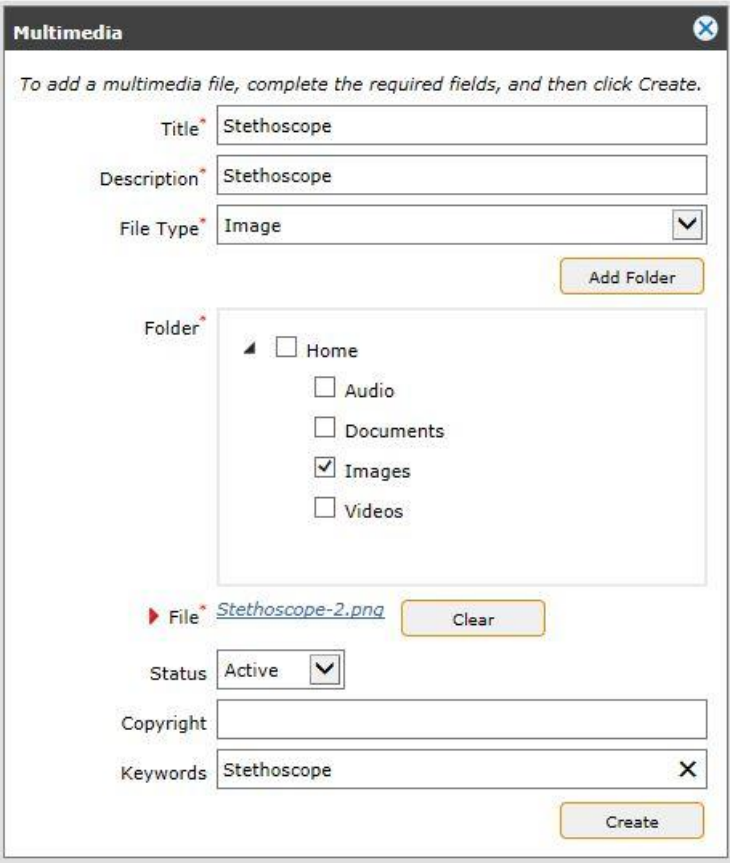
Enter the following information:

Field	Description
Add Support File	Select a multimedia file (e.g., .jpg, .wmv, .avi) from your PC. Browse for the file, press **Upload**, and **Save Changes** when finished.
Add From Multimedia Library	Select a multimedia file from your multimedia library. Select the Search File Type (Audio, Video, Image, Document) by clicking the applicable checkboxes. The default search location is the multimedia Home directory; click the **Audio**, **Video**, **Image**, and **Document** subfolder checkboxes to search those locations. You can also enter text to narrow your search parameters within the results grid.

The multimedia grid appears with the folder view in the left column. If a multimedia item's file name has already been selected, it appears by default in the grid. Multimedia grid items can be sorted by name, type, title, and folder. You can also enter a search term in the text field to locate grid items.

For a thumbnail view of the file, click the **Switch to Thumbnail View** hyperlink.

You can also add a multimedia file to the multimedia library. Click the **Add to Multimedia Library** button to call up the following dialog (an example appears below):



Enter the following:

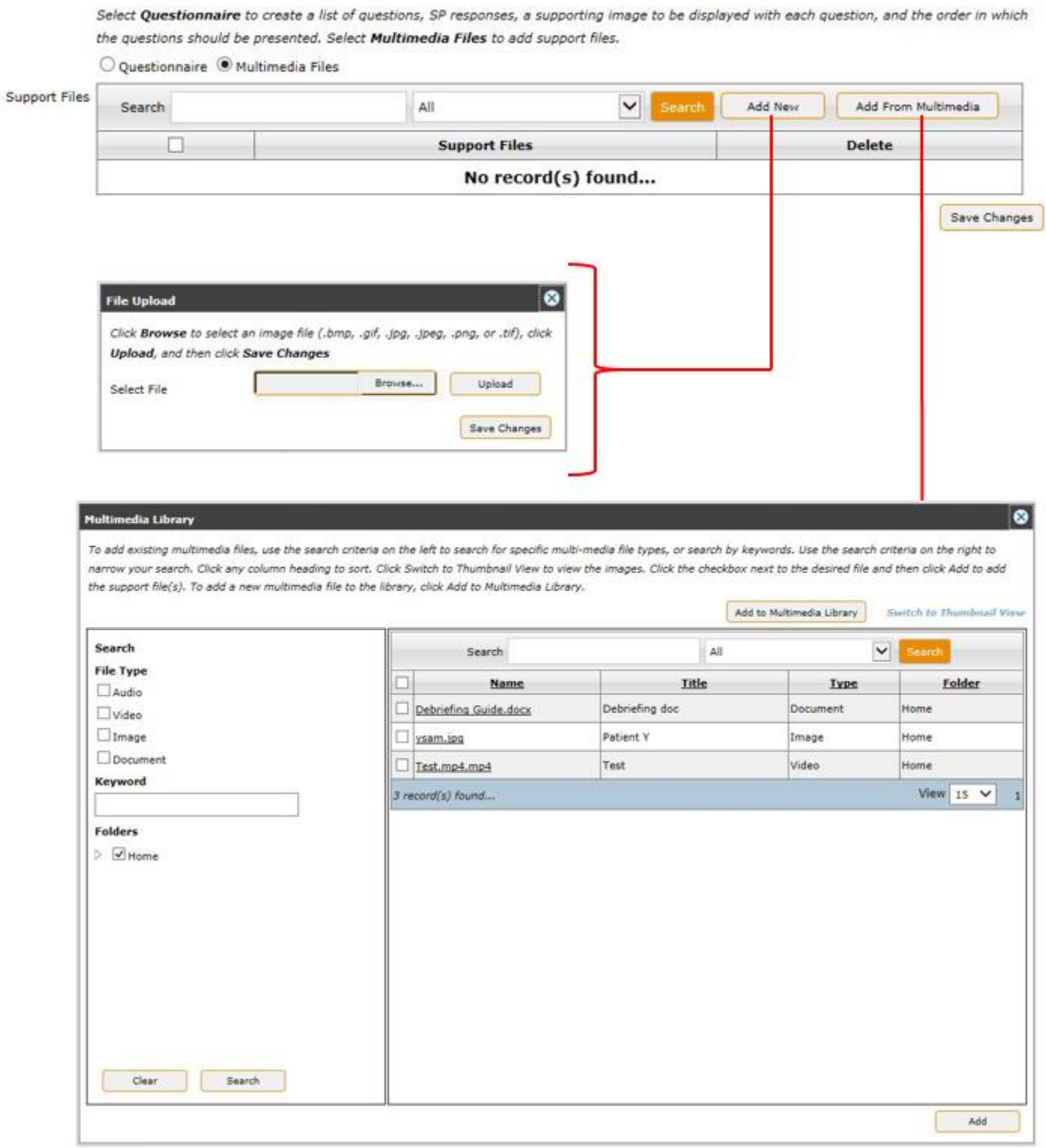
Field	Description
Title*	Enter the title of the multimedia file.
Description*	Enter a description of the multimedia file.
File Type*	Select a file type (Audio, Video, Image, Document).
Folder*	Click the arrow next to the Home folder to open up subfolder locations for the multimedia file. To create a new subfolder, click the **Add Folder** button.

File*	Click **Browse** to locate the file and **Upload** to place the file in your folder location. Press **Clear** to remove the file.
Status	Select a status of **Active** or **Retired**.
Copyright	Enter copyright details for the multimedia file.
Keywords	Enter any keywords for the file.
*-required field	

After entering your information including the folder location, press **Create** to add the item to the multimedia library; this removes the item from the Home directory shown on the grid. Select the file and press **Add** at the Multimedia Library dialog to add the file to your question. Select **Save & New** to save the question and enter another or press **Save Changes** when you have finished.

Multimedia

A multimedia file can be attached to the chief complaint as follows:



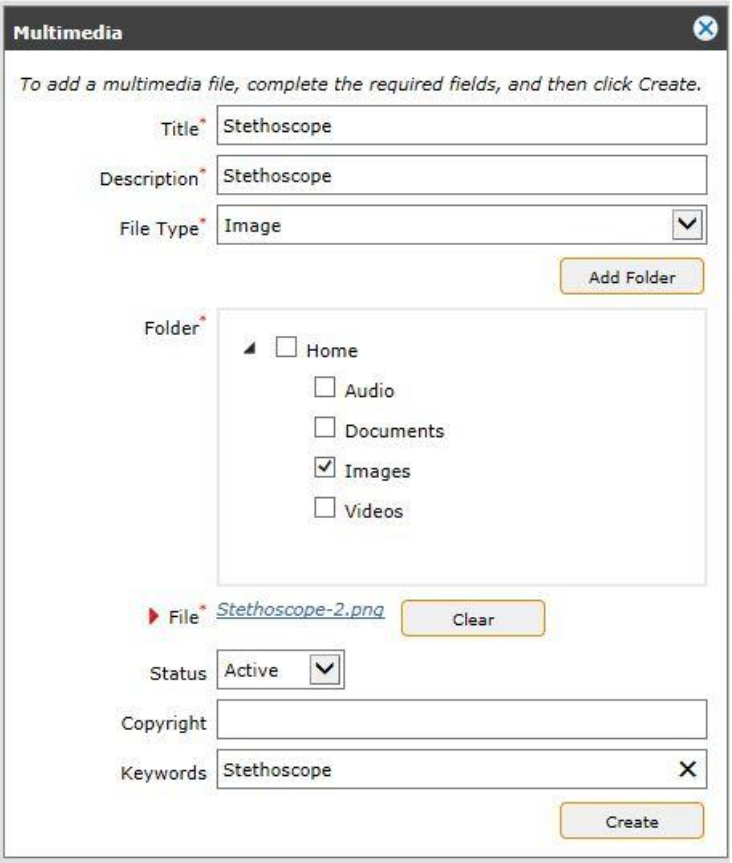
The following selections are available:

Field	Description
Add New	Select a multimedia file (e.g., .jpg, .wmv, .avi) from your PC. Browse for the file, press **Upload**, and **Save Changes** when finished (this populates the Support Files grid).
Add From Multimedia	Select a multimedia file from your multimedia library. Select the Search File Type (Audio, Video, Image, Document) by clicking the applicable checkboxes. The default search location is the multimedia Home directory; click the **Audio**, **Video**, **Image**, and **Document** subfolder checkboxes to search those locations. You can also enter text to narrow your search parameters within the results grid.

The multimedia grid appears with the folder view in the left column. If a multimedia item's file name has already been selected, it appears by default in the grid. Multimedia grid items can be sorted by name, type, title, and folder. You can also enter a search term in the text field to locate grid items.

For a thumbnail view of the file, click the **Switch to Thumbnail View** hyperlink.

You can also add a multimedia file to the multimedia library. Click the **Add to Multimedia Library** button to call up the following dialog (an example appears below):



Enter the following:

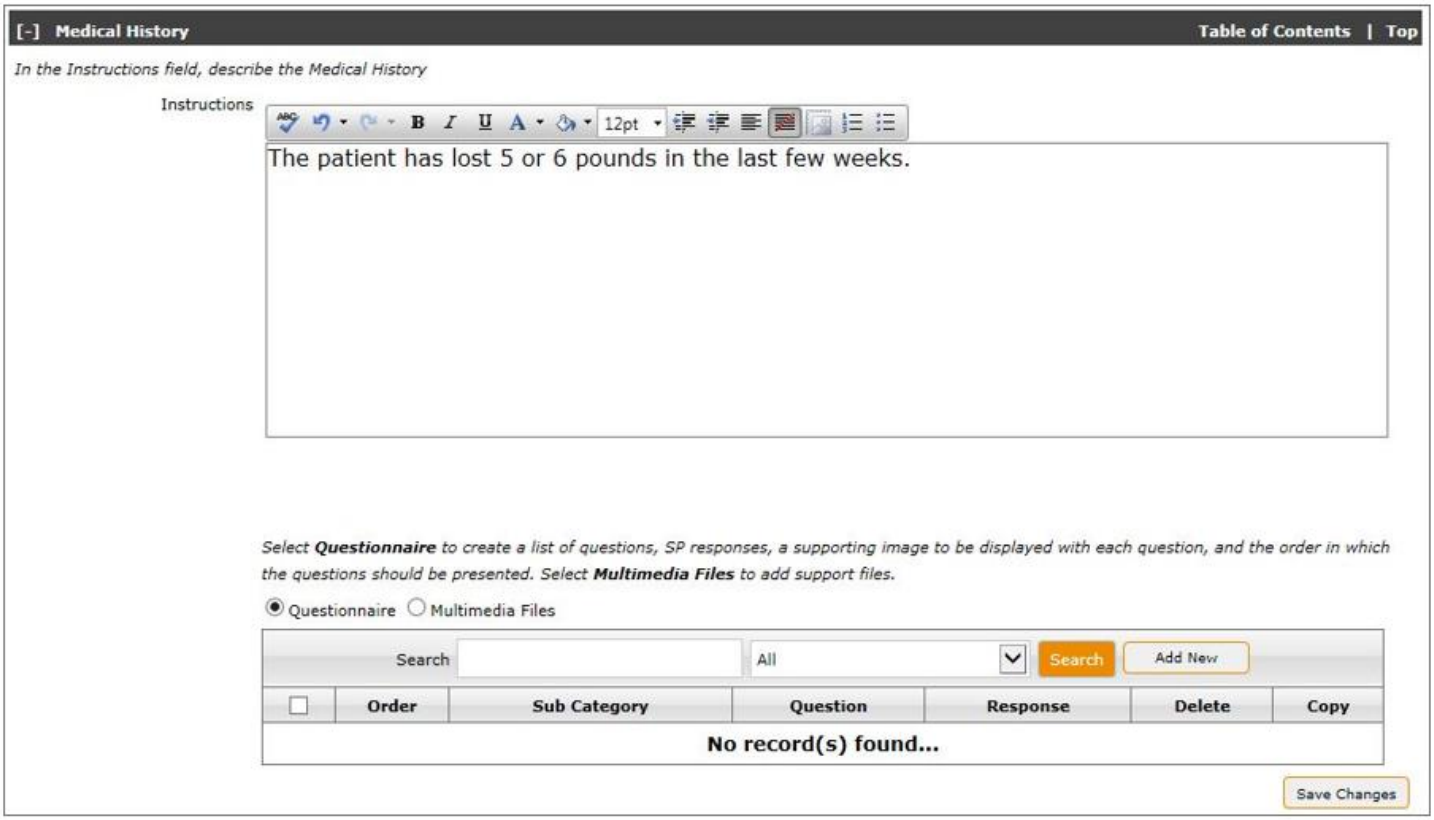
Field	Description
Title*	Enter the title of the multimedia file.
Description*	Enter a description of the multimedia file.
File Type*	Select a file type (Audio, Video, Image, Document).
Folder*	Click the arrow next to the Home folder to open up subfolder locations for the multimedia file. To create a new subfolder, click the **Add Folder** button.
File*	Click **Browse** to locate the file and **Upload** to place the file in your folder location. Press **Clear** to remove the file.
Status	Select a status of **Active** or **Retired**.
Copyright	Enter copyright details for the multimedia file.
Keywords	Enter any keywords for the file.
*-required field	

After entering your information including the folder location, press **Create** to add the item to the multimedia library; this removes the item from the Home directory shown on the grid. Select the file and press **Add** at the Multimedia Library dialog to add the file to your question.

Press **Save Changes** to retain the information at this section.

Medical History

Note: If a Case Authoring document is associated with this training case, any documents associated with it appear at this section.

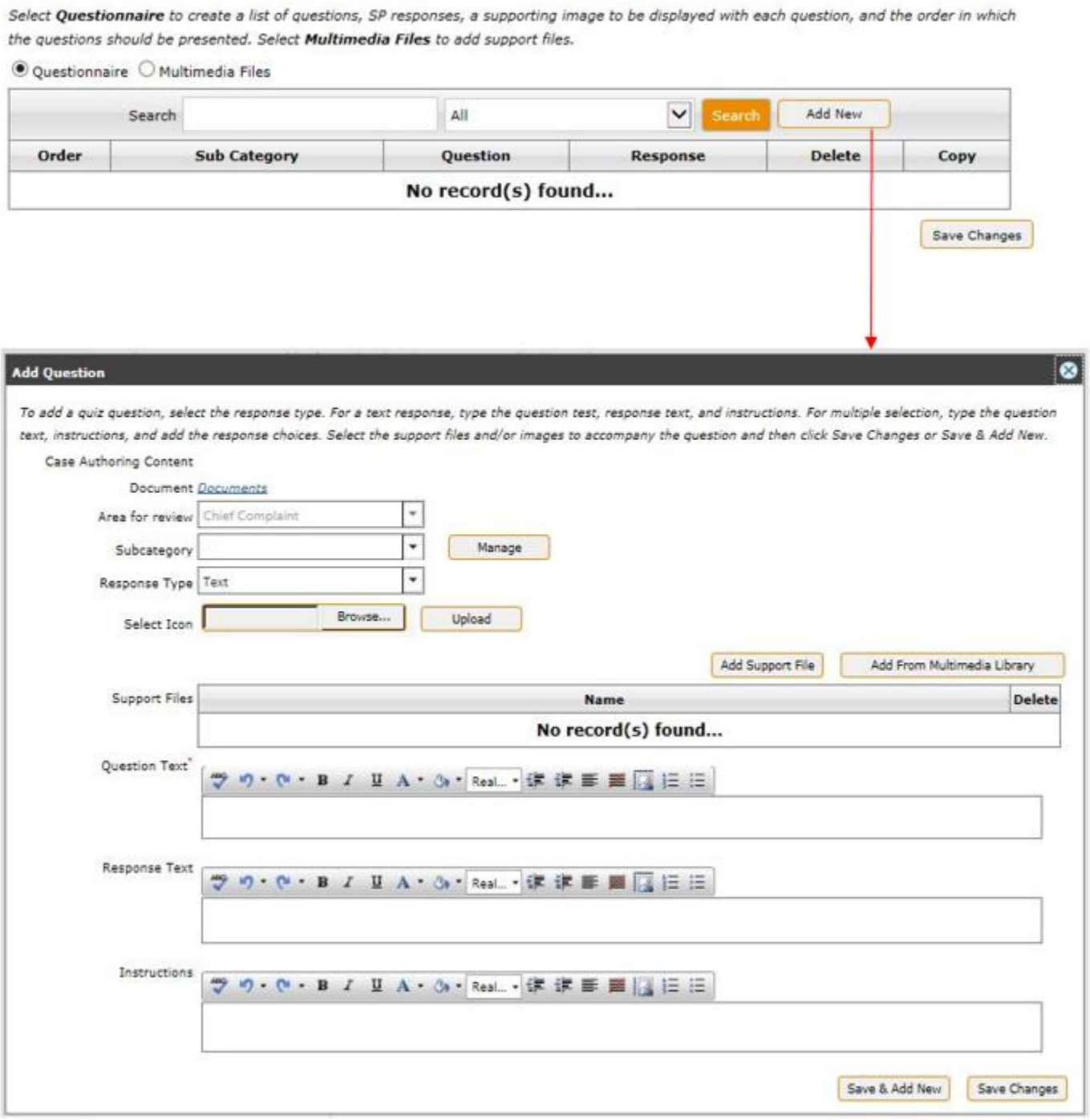


Enter the following in this section:

Field	Description
Instructions	Enter information related to medical history as part of the patient portrayal.
Questionnaire/ Multimedia Files	Select a questionnaire or multimedia file to be included in the patient portrayal of medical history for SP review.

Questionnaire

A questionnaire can be attached as part of medical history as follows:

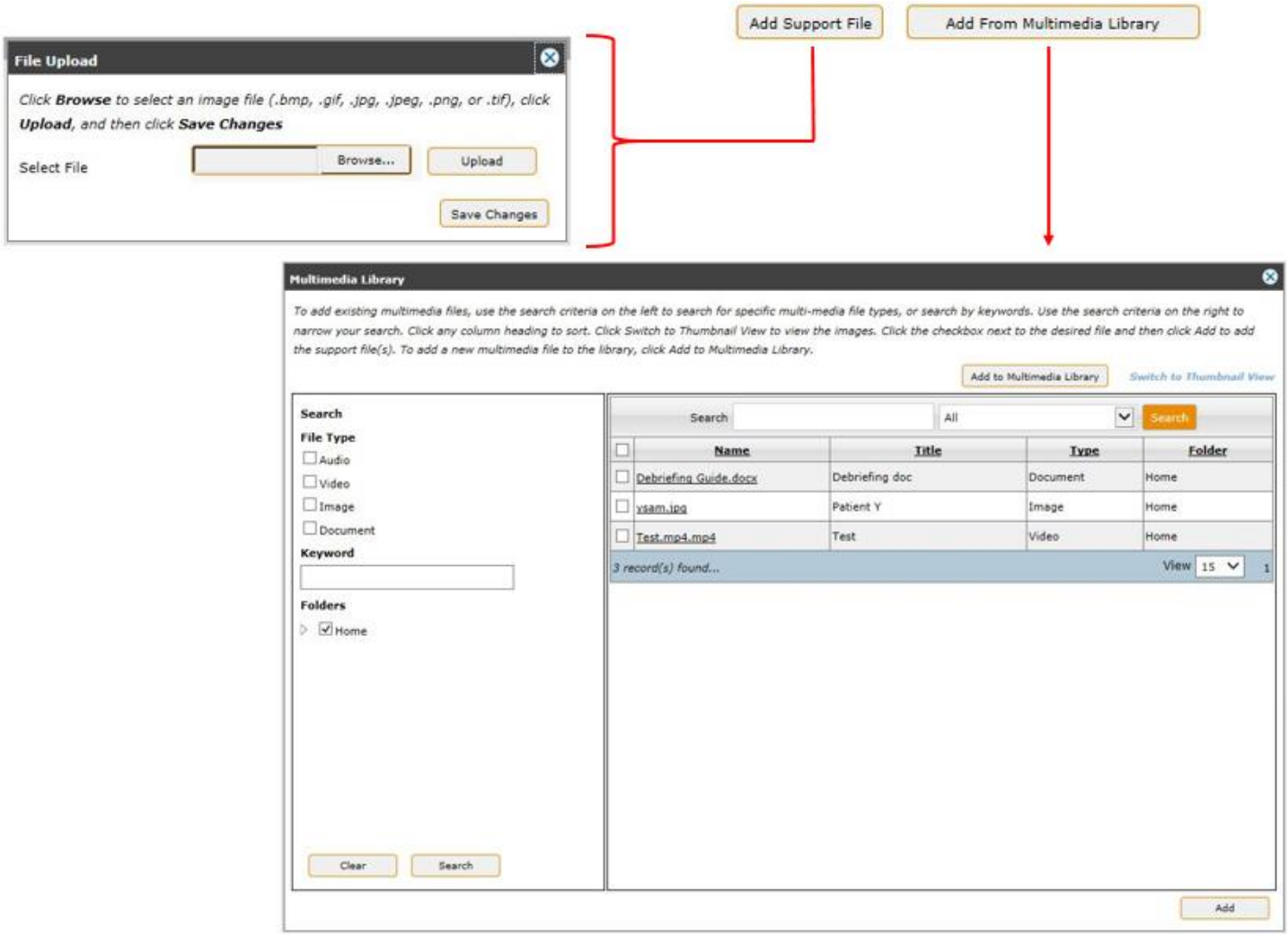


Note: Image altered for presentation purposes.

Enter the following information:

Field	Description
Area for Review	The current area for review (Chief Complaint, Social History, etc.) will be displayed.
Sub Category	Create a sub category if desired, such as HPI (History of Present Illness) or ROS (Review of Systems) under medical categories such as Chief Complaint or Medical History.
Response Type	This defaults to Text when adding a question to the training case.
Select Icon	Upload an icon from the multimedia library for use with a question and answer for easier recall by the SP.
Support Files	Add multimedia support files to illustrate points for the standardized patient.
Question Text	This is the anticipated question posed by the learner.
Response Text	This is the information the SP will learn and use when responding to the student.
Instructions	Enter a summary of the overall complaint (e.g., breathing problems)

From within the questionnaire selection, a multimedia file can be attached as follows:



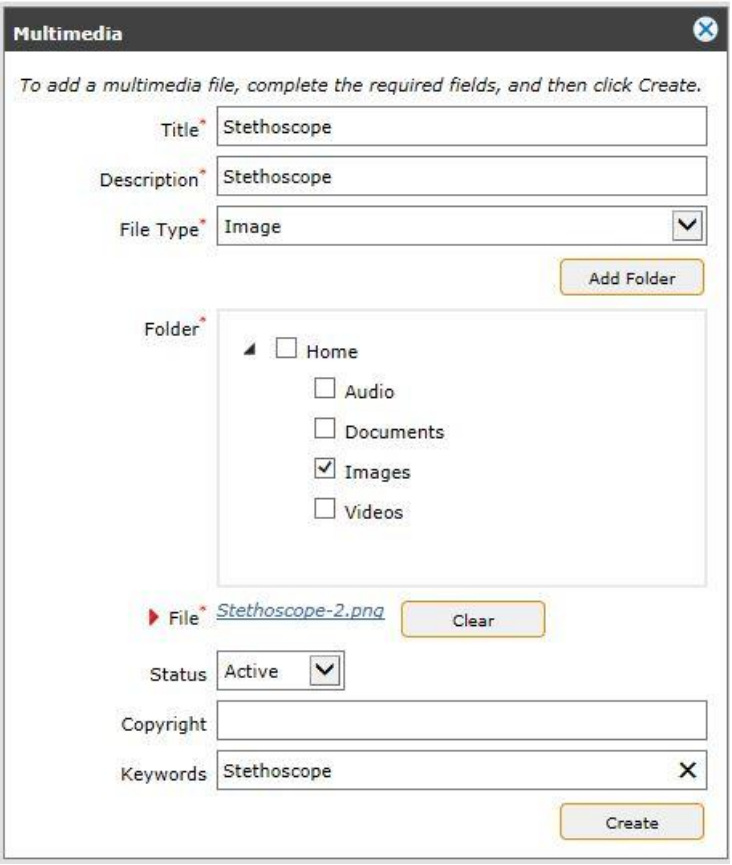
Enter the following information:

Field	Description
Add Support File	Select a multimedia file (e.g., .jpg, .wmv, .avi) from your PC. Browse for the file, press **Upload**, and **Save Changes** when finished.
Add From Multimedia Library	Select a multimedia file from your multimedia library. Select the Search File Type (Audio, Video, Image, Document) by clicking the applicable checkboxes. The default search location is the multimedia Home directory; click the **Audio**, **Video**, **Image**, and **Document** subfolder checkboxes to search those locations. You can also enter text to narrow your search parameters within the results grid.

The multimedia grid appears with the folder view in the left column. If a multimedia item's file name has already been selected, it appears by default in the grid. Multimedia grid items can be sorted by name, type, title, and folder. You can also enter a search term in the text field to locate grid items.

For a thumbnail view of the file, click the **Switch to Thumbnail View** hyperlink.

You can also add a multimedia file to the multimedia library. Click the **Add to Multimedia Library** button to call up the following dialog (an example appears below):



Enter the following:

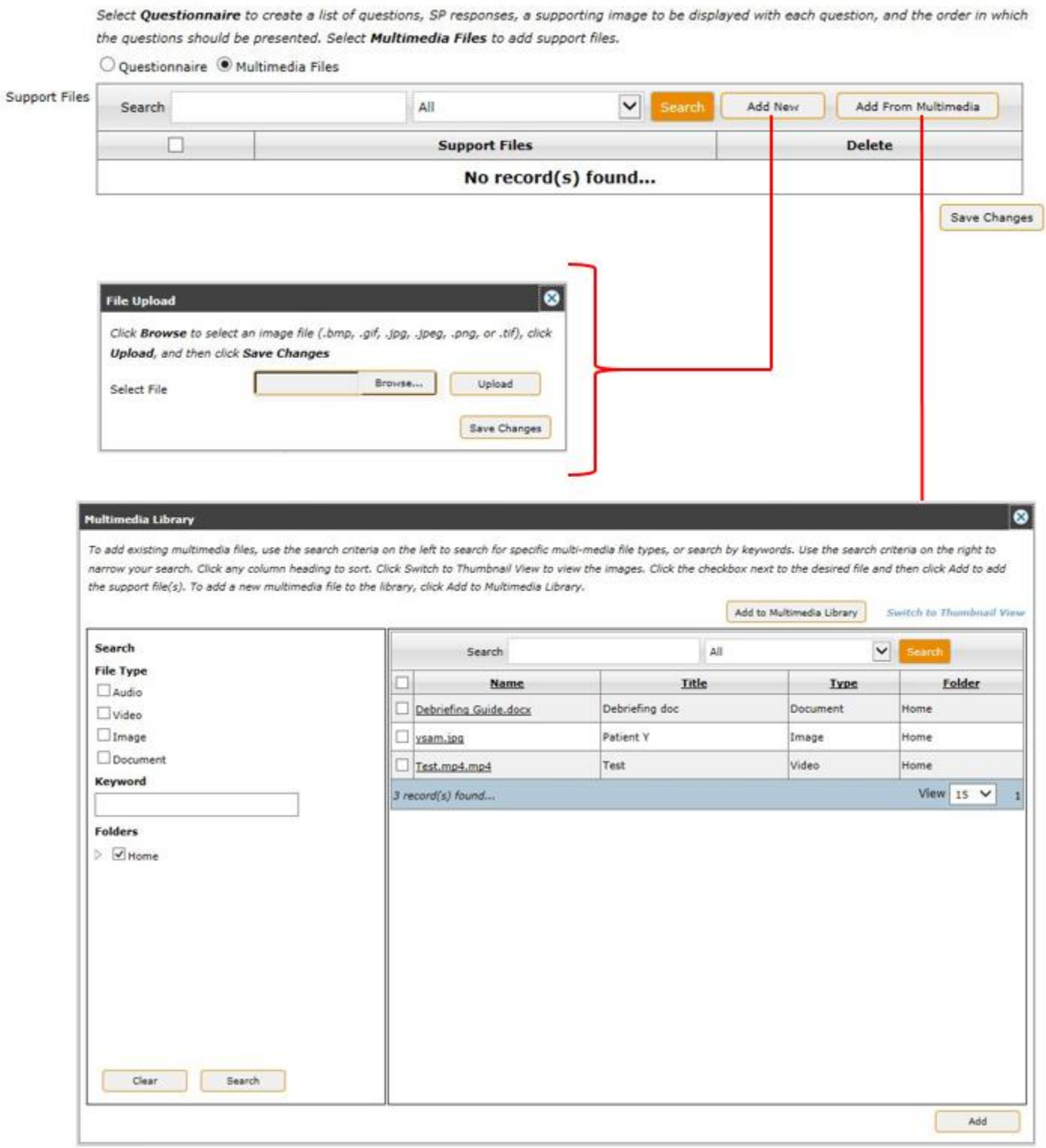
Field	Description
Title*	Enter the title of the multimedia file.
Description*	Enter a description of the multimedia file.
File Type*	Select a file type (Audio, Video, Image, Document).
Folder*	Click the arrow next to the **Home** folder to open up subfolder locations for the multimedia file. To create a new subfolder, click the **Add Folder** button.
File*	Click **Browse** to locate the file and **Upload** to place the file in your folder location. Press **Clear** to remove the file.

Status	Select a status of **Active** or **Retired**.
Copyright	Enter copyright details for the multimedia file.
Keywords	Enter any keywords for the file.
***-required field	

After entering your information including the folder location, press **Create** to add the item to the multimedia library; this removes the item from the Home directory shown on the grid. Select the file and press **Add** at the Multimedia Library dialog to add the file to your question. Select **Save & New** to save the question and enter another or press **Save Changes** when you have finished.

Multimedia

A multimedia file can be attached to the medical history as follows:



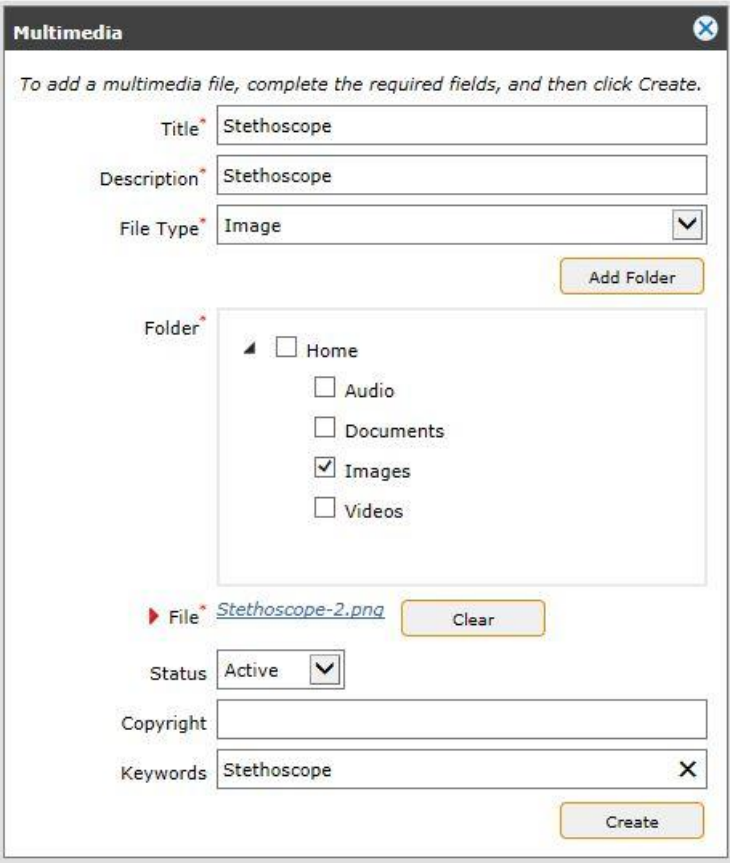
The following selections are available:

Field	Description
Add New	Select a multimedia file (e.g., .jpg, .wmv, .avi) from your PC. Browse for the file, press **Upload**, and **Save Changes** when finished (this populates the Support Files grid).
Add From Multimedia	Select a multimedia file from your multimedia library. Select the Search File Type (Audio, Video, Image, Document) by clicking the applicable checkboxes. The default search location is the multimedia Home directory; click the **Audio**, **Video**, **Image**, and **Document** subfolder checkboxes to search those locations. You can also enter text to narrow your search parameters within the results grid.

The multimedia grid appears with the folder view in the left column. If a multimedia item's file name has already been selected, it appears by default in the grid. Multimedia grid items can be sorted by name, type, title, and folder. You can also enter a search term in the text field to locate grid items.

For a thumbnail view of the file, click the **Switch to Thumbnail View** hyperlink.

You can also add a multimedia file to the multimedia library. Click the **Add to Multimedia Library** button to call up the following dialog (an example appears below):



Enter the following:

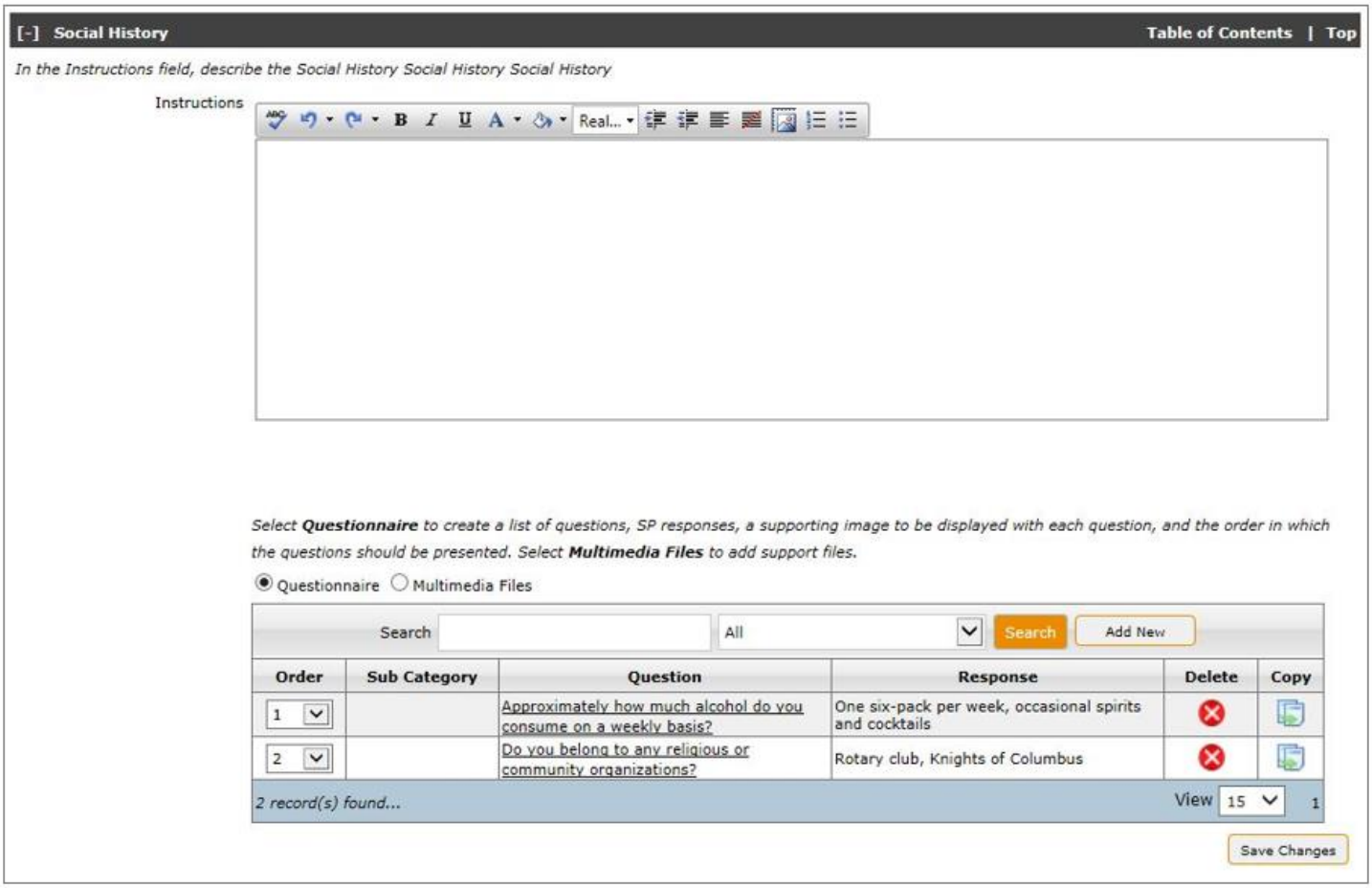
Field	Description
Title*	Enter the title of the multimedia file.
Description*	Enter a description of the multimedia file.
File Type*	Select a file type (Audio, Video, Image, Document).
Folder*	Click the arrow next to the **Home** folder to open up subfolder locations for the multimedia file. To create a new subfolder, click the **Add Folder** button.
File*	Click **Browse** to locate the file and **Upload** to place the file in your folder location. Press **Clear** to remove the file.
Status	Select a status of **Active** or **Retired**.
Copyright	Enter copyright details for the multimedia file.
Keywords	Enter any keywords for the file.
*-required field	

After entering your information including the folder location, press **Create** to add the item to the multimedia library; this removes the item from the Home directory shown on the grid. Select the file and press **Add** at the Multimedia Library dialog to add the file to your question.

Press **Save Changes** to retain the information at this section.

Social History

Note: If a Case Authoring document is associated with this training case, any documents associated with it appear at this section.



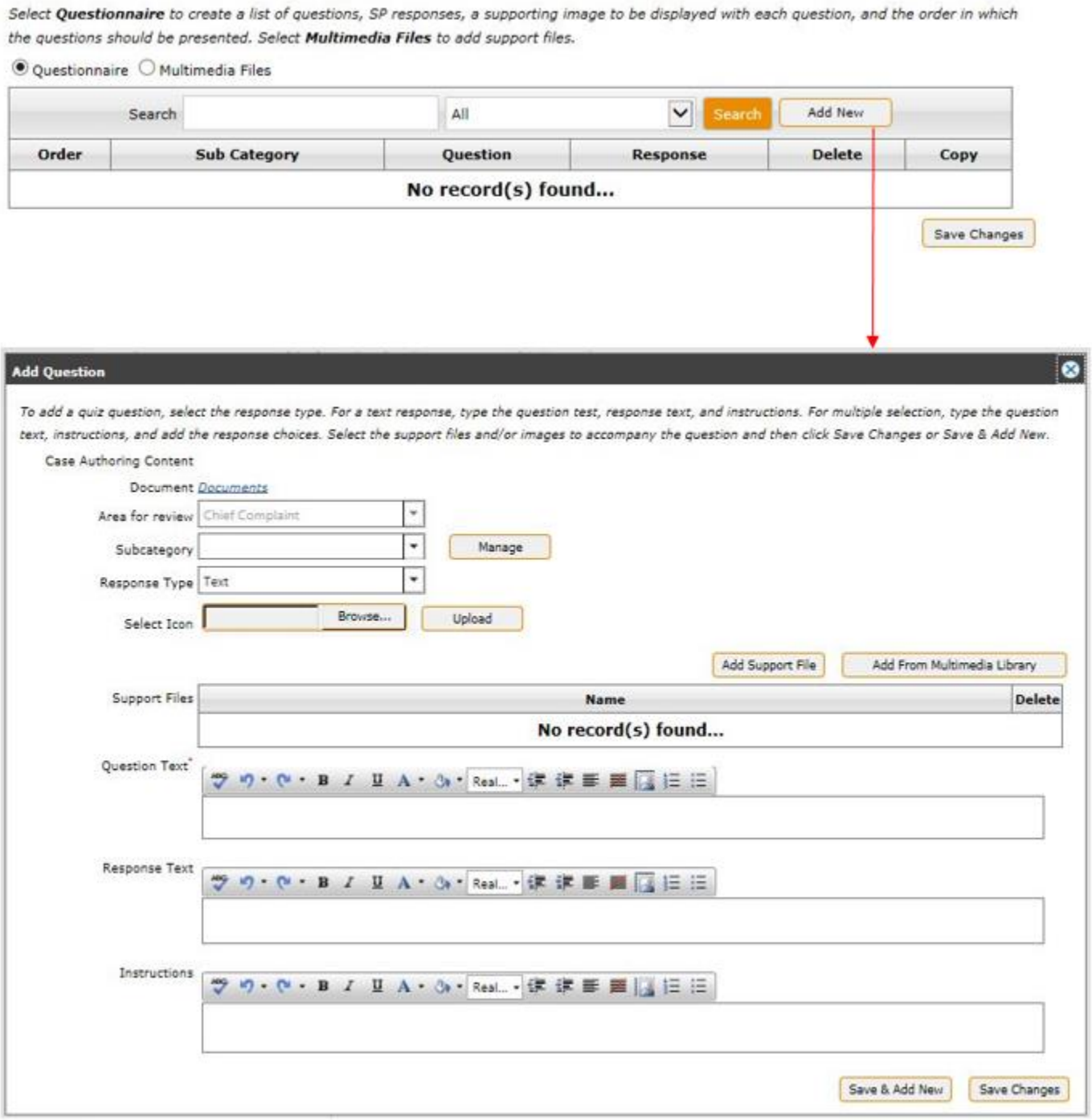
Enter the following in this section:

Field	Description
Instructions	Enter information related to social history as part of the patient portrayal, including lifestyle or other external factors.
Questionnaire/ Multimedia	Select a questionnaire or multimedia file to be included in the patient portrayal of social history for SP review.

Files	

Questionnaire

A questionnaire can be attached to portray social history as follows:

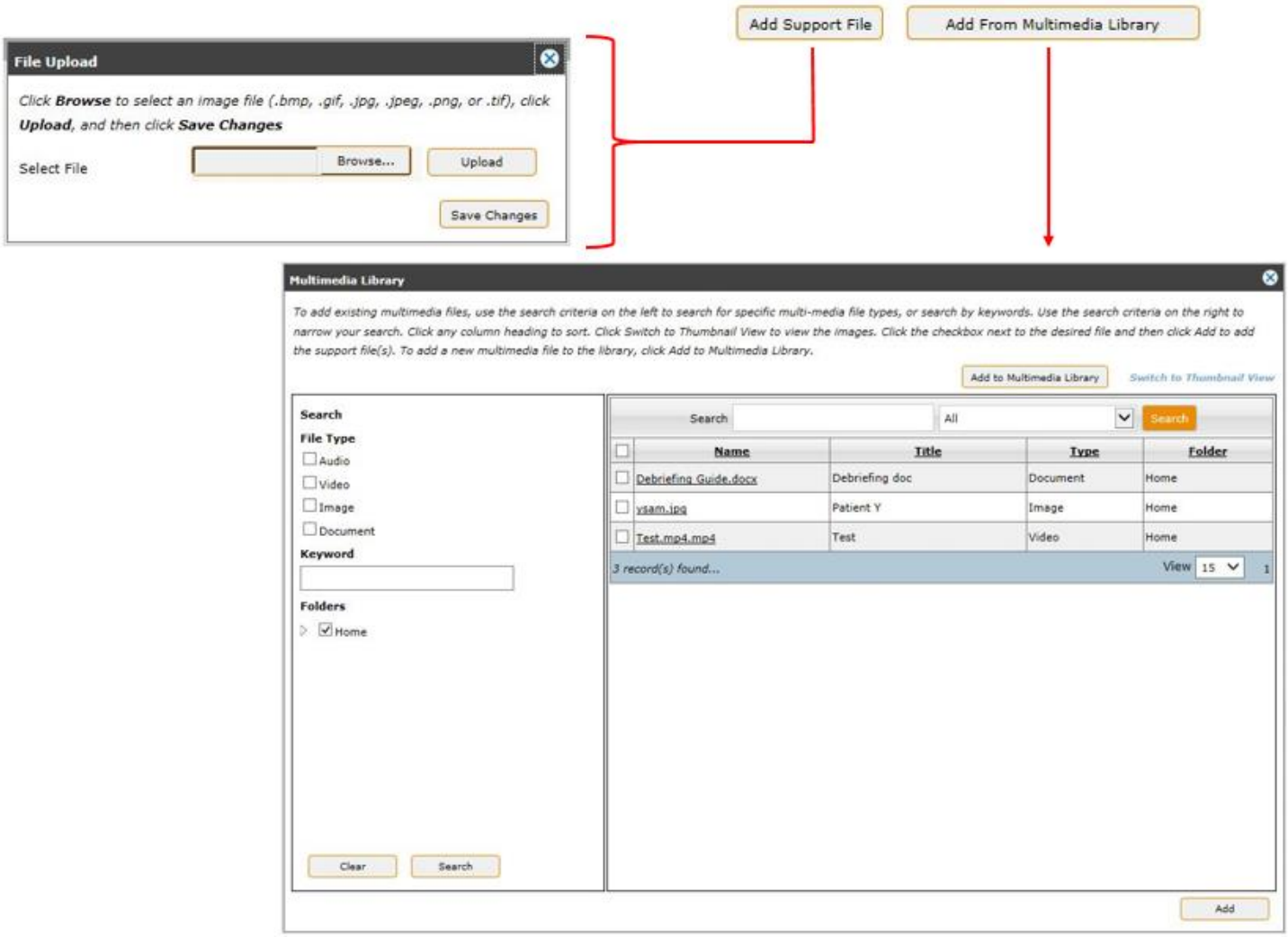


Note: Image altered for presentation purposes.

Enter the following information:

Field	Description
Area for Review	The current area for review (Chief Complaint, Social History, etc.) will be displayed.
Sub Category	Create a sub category if desired, such as HPI (History of Present Illness) or ROS (Review of Systems) under medical categories such as Chief Complaint or Medical History.
Response Type	This defaults to Text when adding a question to the training case.
Select Icon	Upload an icon from the multimedia library for use with a question and answer for easier recall by the SP.
Support Files	Add multimedia support files to illustrate points for the standardized patient.
Question Text	This is the anticipated question posed by the learner.
Response Text	This is the information the SP will learn and use when responding to the student.
Instructions	Enter a summary of the overall complaint (e.g., breathing problems)

From within the questionnaire selection, a multimedia file can be attached as follows:



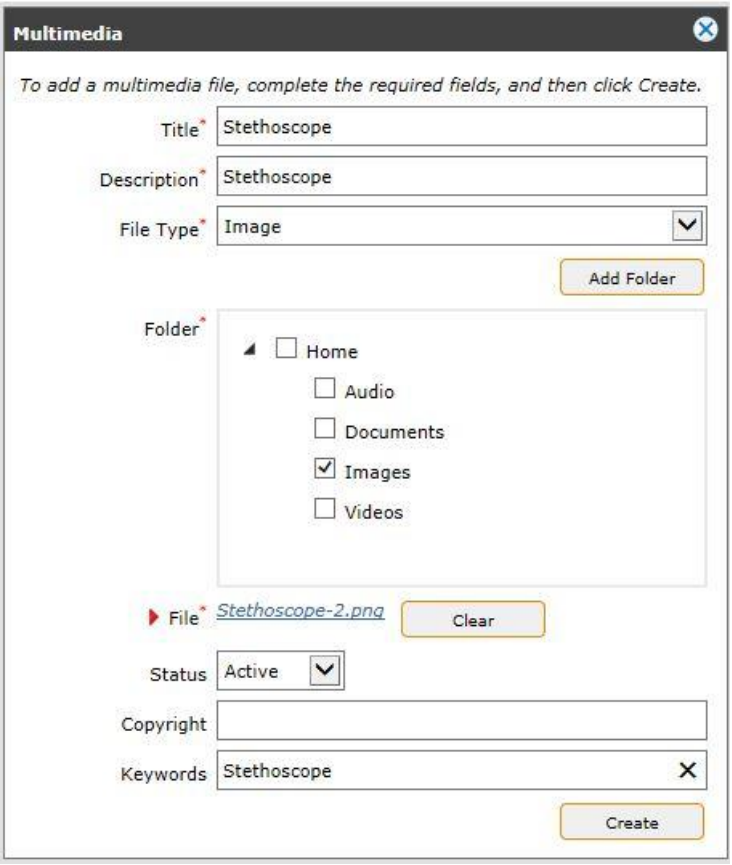
Enter the following information:

Field	Description
Add Support File	Select a multimedia file (e.g., .jpg, .wmv, .avi) from your PC. Browse for the file, press **Upload**, and **Save Changes** when finished.
Add From Multimedia Library	Select a multimedia file from your multimedia library. Select the Search File Type (Audio, Video, Image, Document) by clicking the applicable checkboxes. The default search location is the multimedia Home directory; click the **Audio**, **Video**, **Image**, and **Document** subfolder checkboxes to search those locations. You can also enter text to narrow your search parameters within the results grid.

The multimedia grid appears with the folder view in the left column. If a multimedia item's file name has already been selected, it appears by default in the grid. Multimedia grid items can be sorted by name, type, title, and folder. You can also enter a search term in the text field to locate grid items.

For a thumbnail view of the file, click the **Switch to Thumbnail View** hyperlink.

You can also add a multimedia file to the multimedia library. Click the **Add to Multimedia Library** button to call up the following dialog (an example appears below):



Enter the following:

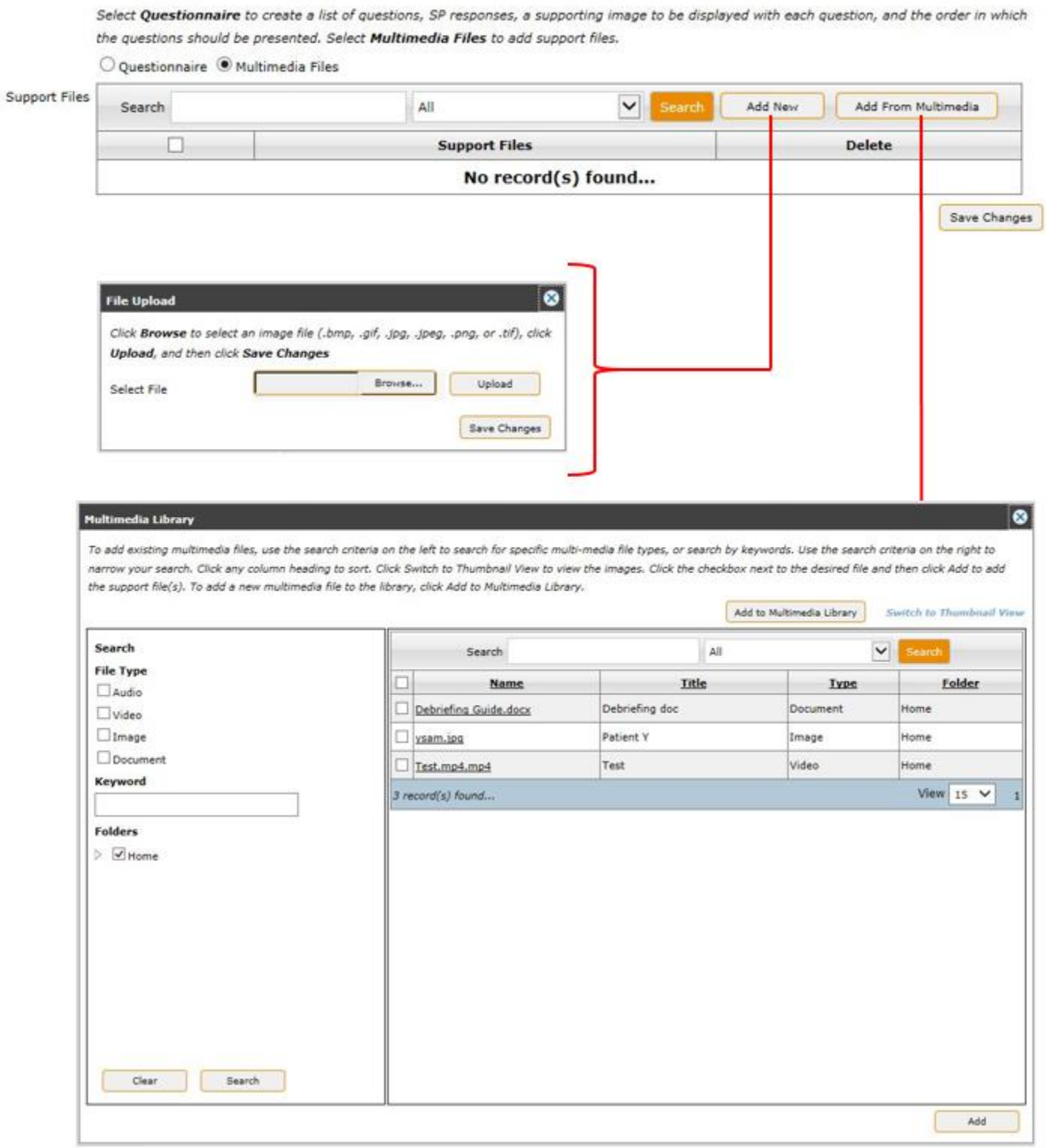
Field	Description
Title*	Enter the title of the multimedia file.
Description*	Enter a description of the multimedia file.
File Type*	Select a file type (Audio, Video, Image, Document).
Folder*	Click the arrow next to the Home folder to open up subfolder locations for the multimedia file. To create a new subfolder, click the **Add Folder** button.
File*	Click **Browse** to locate the file and **Upload** to place the file in your folder location. Press **Clear** to remove the file.

Status	Select a status of **Active** or **Retired**.
Copyright	Enter copyright details for the multimedia file.
Keywords	Enter any keywords for the file.
*-required field	

After entering your information including the folder location, press **Create** to add the item to the multimedia library; this removes the item from the Home directory shown on the grid. Select the file and press **Add** at the Multimedia Library dialog to add the file to your question. Select **Save & New** to save the question and enter another or press **Save Changes** when you have finished.

Multimedia

A multimedia file can be attached to the social history as follows:



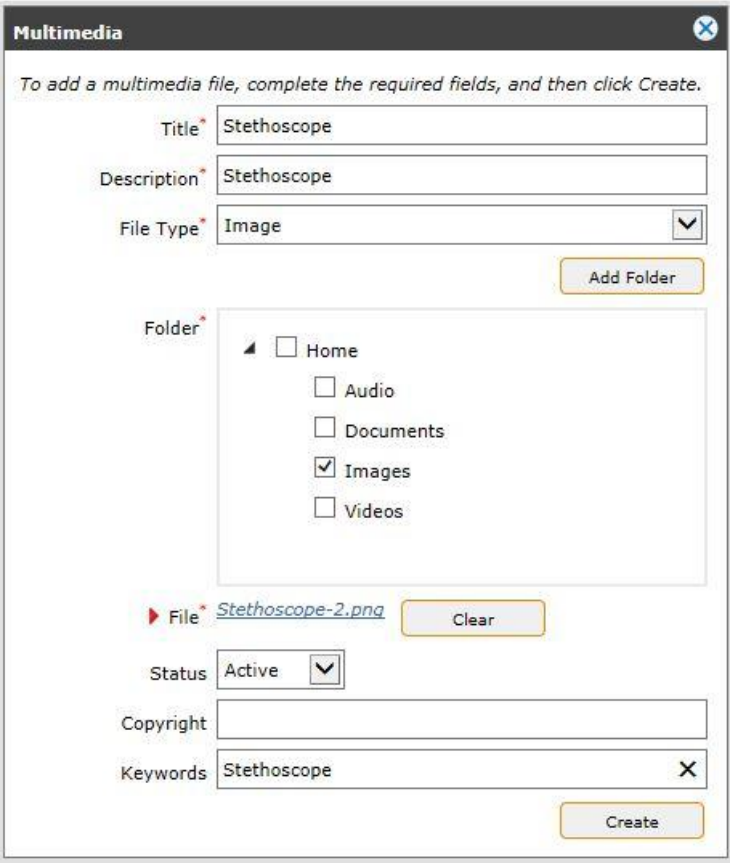
The following selections are available:

Field	Description
Add New	Select a multimedia file (e.g., .jpg, .wmv, .avi) from your PC. Browse for the file, press **Upload,** and **Save Changes** when finished (this populates the Support Files grid).
Add From Multimedia	Select a multimedia file from your multimedia library. Select the Search File Type (Audio, Video, Image, Document) by clicking the applicable checkboxes. The default search location is the multimedia Home directory; click the **Audio**, **Video**, **Image**, and **Document** subfolder checkboxes to search those locations. You can also enter text to narrow your search parameters within the results grid.

The multimedia grid appears with the folder view in the left column. If a multimedia item's file name has already been selected, it appears by default in the grid. Multimedia grid items can be sorted by name, type, title, and folder. You can also enter a search term in the text field to locate grid items.

For a thumbnail view of the file, click the **Switch to Thumbnail View** hyperlink.

You can also add a multimedia file to the multimedia library. Click the **Add to Multimedia Library** button to call up the following dialog (an example appears below):



Enter the following:

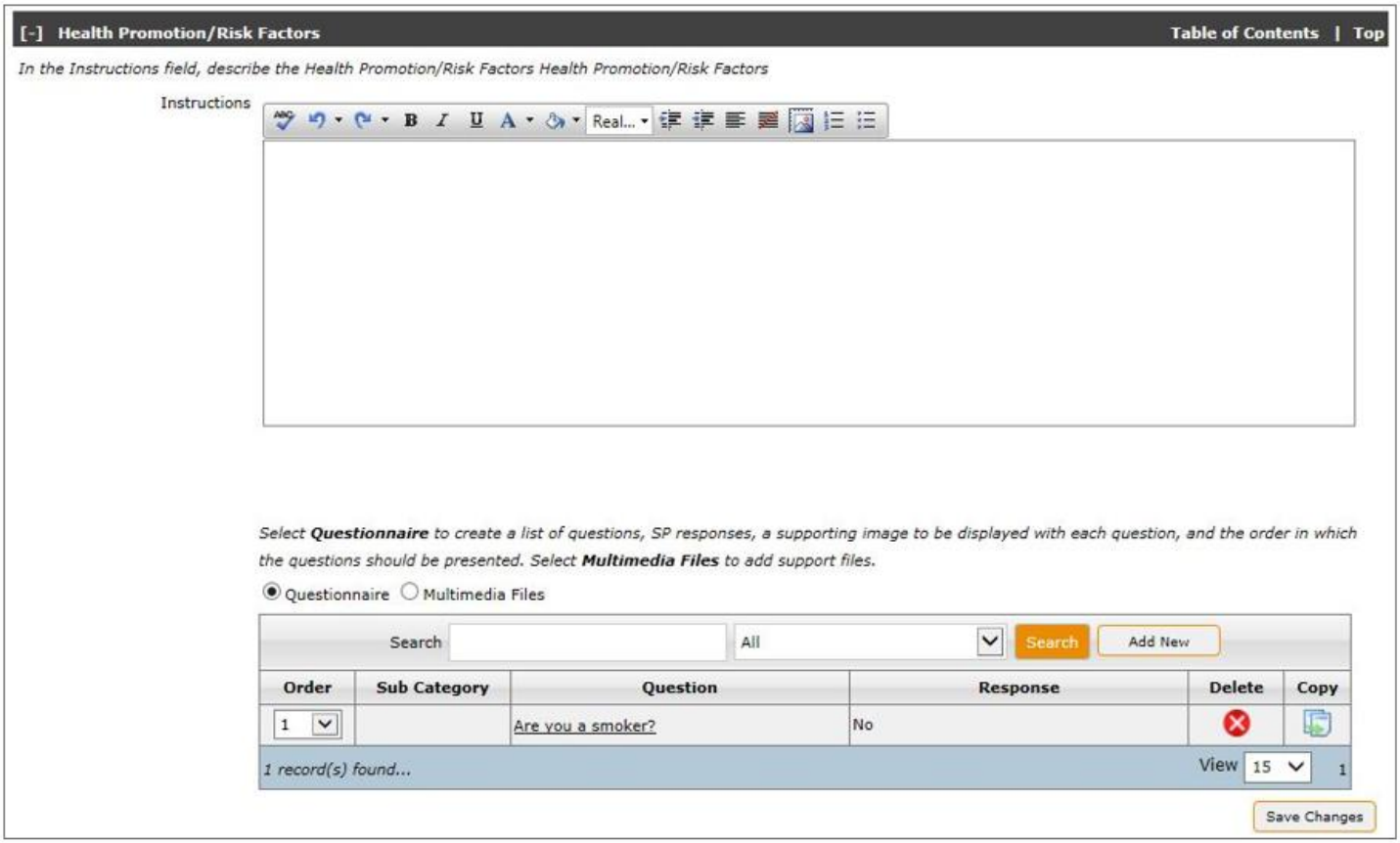
Field	Description
Title*	Enter the title of the multimedia file.
Description*	Enter a description of the multimedia file.
File Type*	Select a file type (Audio, Video, Image, Document).
Folder*	Click the arrow next to the Home folder to open up subfolder locations for the multimedia file. To create a new subfolder, click the **Add Folder** button.
File*	Click **Browse** to locate the file and **Upload** to place the file in your folder location. Press **Clear** to remove the file.
Status	Select a status of **Active** or **Retired**.
Copyright	Enter copyright details for the multimedia file.
Keywords	Enter any keywords for the file.
*-required field	

After entering your information including the folder location, press **Create** to add the item to the multimedia library; this removes the item from the Home directory shown on the grid. Select the file and press **Add** at the Multimedia Library dialog to add the file to your question.

Press **Save Changes** to retain the information at this section.

Health Promotion and Risk Factors

Note: If a Case Authoring document is associated with this training case, any documents associated with it appear at this section.

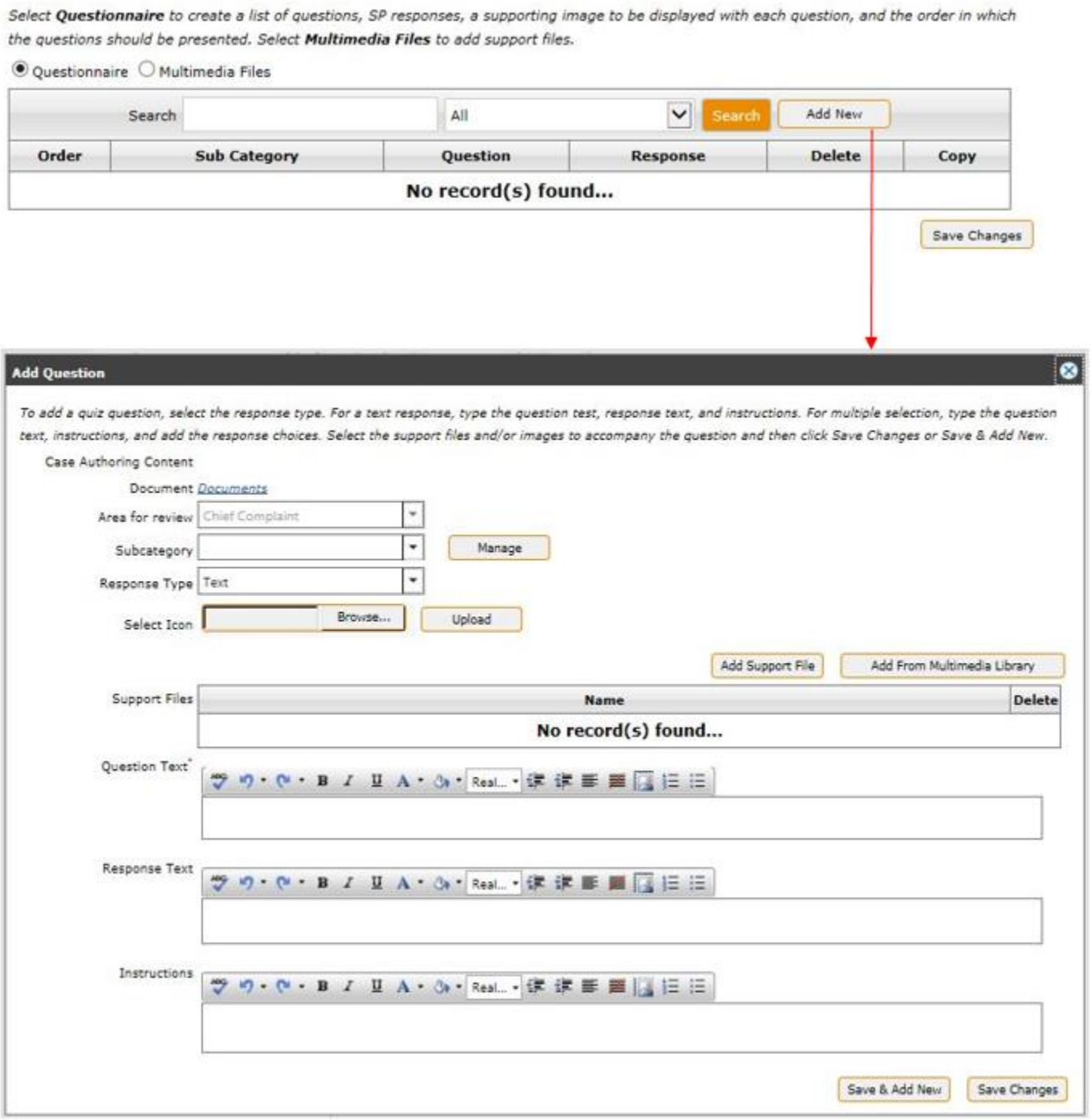


Enter the following in this section:

Field	Description
Instructions	Enter information related to health promotion/risk factors as part of the patient portrayal.
Questionnaire/ Multimedia Files	Select a questionnaire or multimedia file to be included in the patient portrayal of health promotion/risk factors for SP review.

Questionnaire

A questionnaire can be attached to portray health promotion or risk factors as follows:

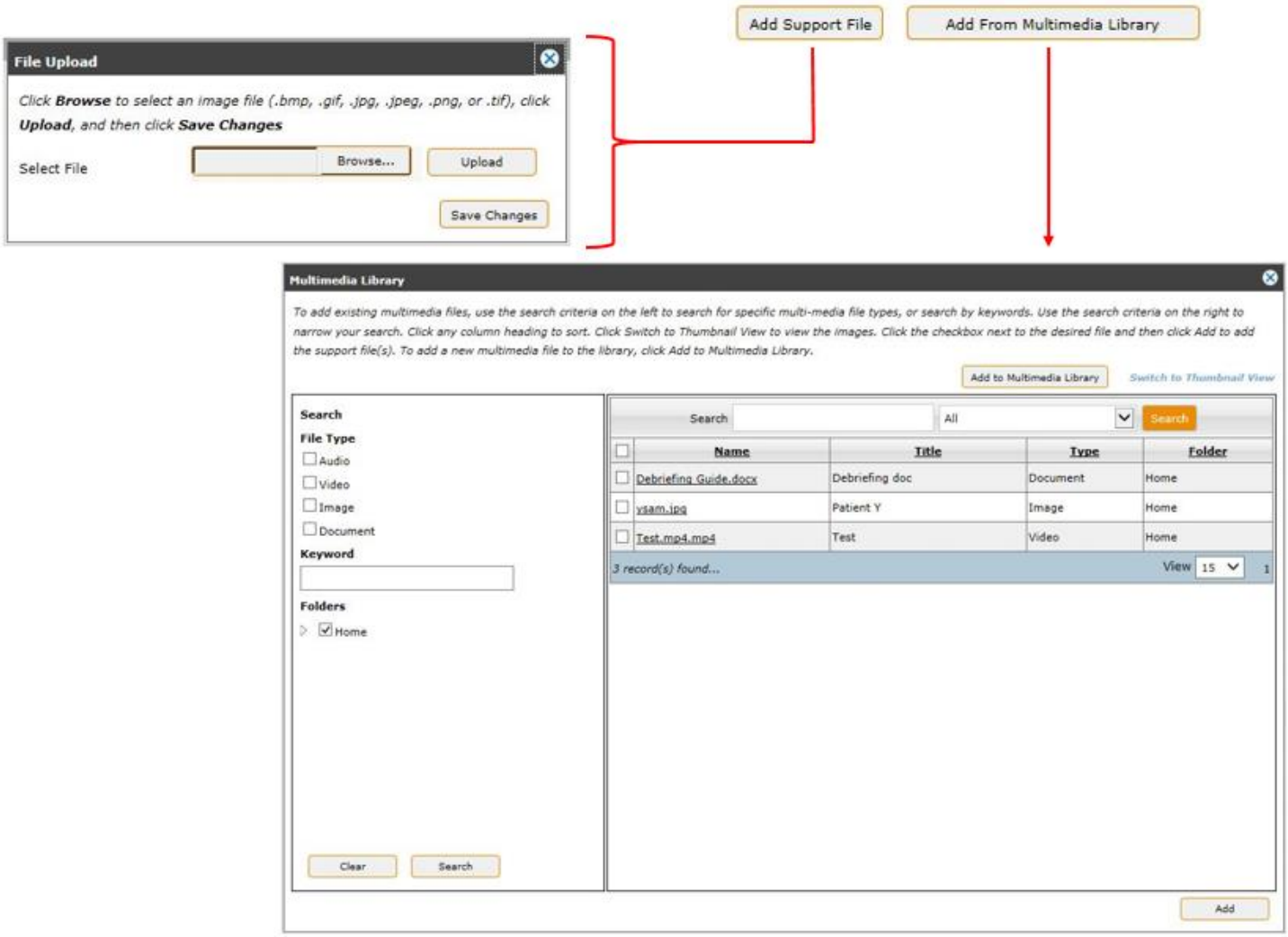


Note: Image altered for presentation purposes.

Enter the following information:

Field	Description
Area for Review	The current area for review (Chief Complaint, Social History, etc.) will be displayed.
Sub Category	Create a sub category if desired, such as HPI (History of Present Illness) or ROS (Review of Systems) under medical categories such as Chief Complaint or Medical History.
Response Type	This defaults to Text when adding a question to the training case.
Select Icon	Upload an icon from the multimedia library for use with a question and answer for easier recall by the SP.
Support Files	Add multimedia support files to illustrate points for the standardized patient.
Question Text	This is the anticipated question posed by the learner.
Response Text	This is the information the SP will learn and use when responding to the student.
Instructions	Enter a summary of the overall complaint (e.g., breathing problems)

From within the questionnaire selection, a multimedia file can be attached as follows:



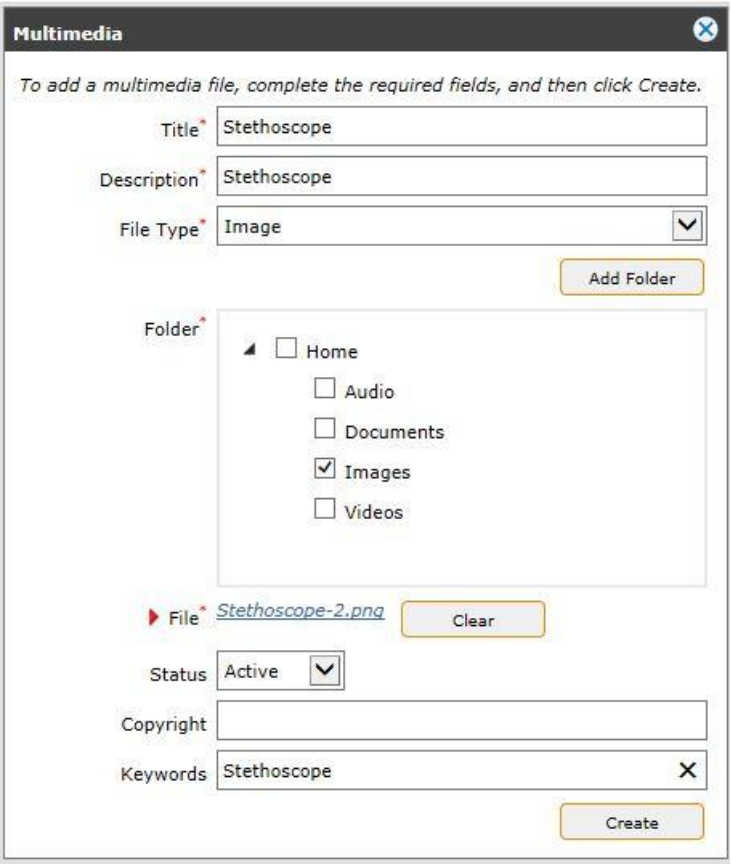
Enter the following information:

Field	Description
Add Support File	Select a multimedia file (e.g., .jpg, .wmv, .avi) from your PC. Browse for the file, press **Upload**, and **Save Changes** when finished.
Add From Multimedia Library	Select a multimedia file from your multimedia library. Select the Search File Type (Audio, Video, Image, Document) by clicking the applicable checkboxes. The default search location is the multimedia Home directory; click the **Audio**, **Video**, **Image**, and **Document** subfolder checkboxes to search those locations. You can also enter text to narrow your search parameters within the results grid.

The multimedia grid appears with the folder view in the left column. If a multimedia item's file name has already been selected, it appears by default in the grid. Multimedia grid items can be sorted by name, type, title, and folder. You can also enter a search term in the text field to locate grid items.

For a thumbnail view of the file, click the **Switch to Thumbnail View** hyperlink.

You can also add a multimedia file to the multimedia library. Click the **Add to Multimedia Library** button to call up the following dialog (an example appears below):



Enter the following:

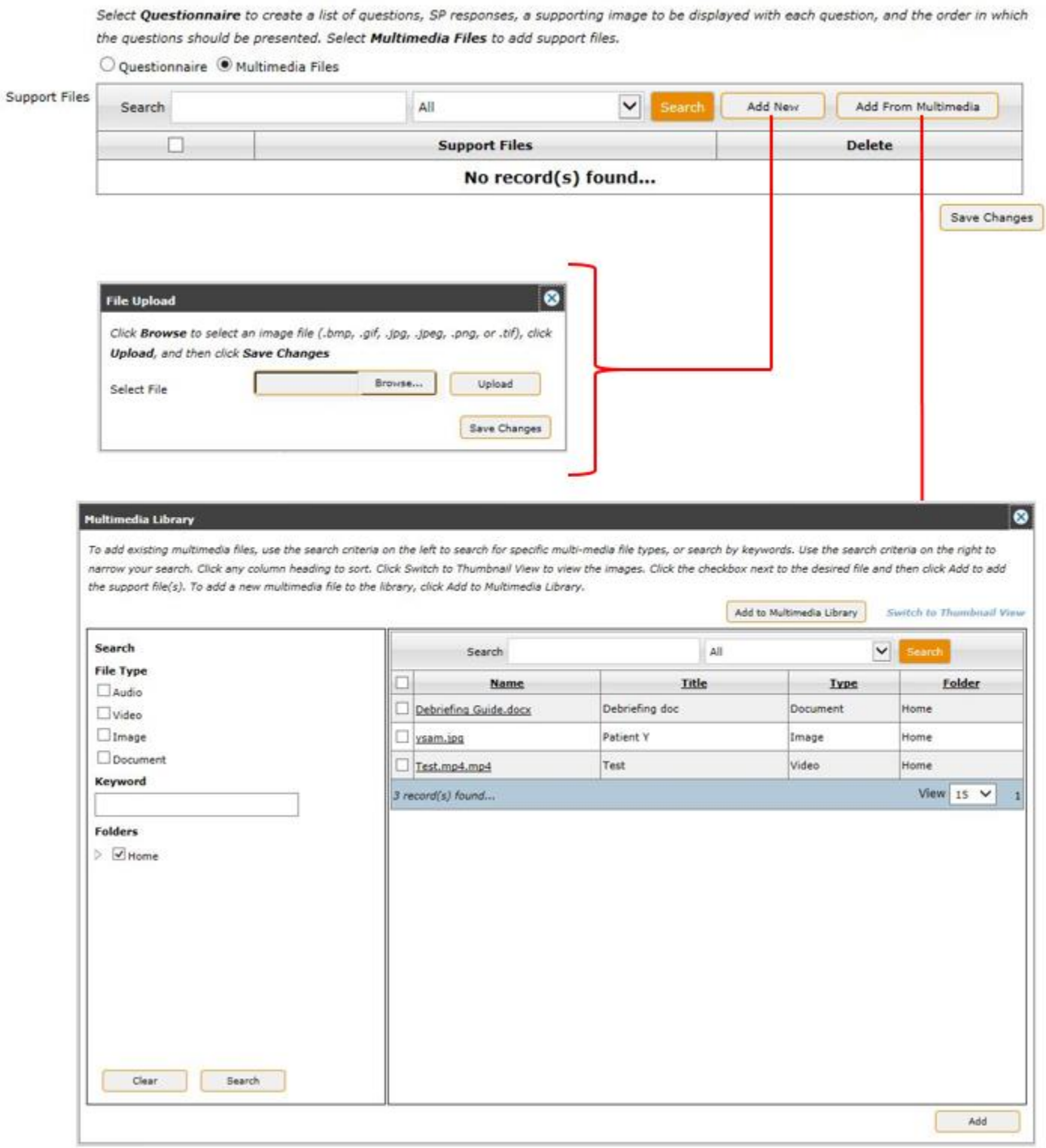
Field	Description
Title*	Enter the title of the multimedia file.
Description*	Enter a description of the multimedia file.
File Type*	Select a file type (Audio, Video, Image, Document).
Folder*	Click the arrow next to the **Home** folder to open up subfolder locations for the multimedia file. To create a new subfolder, click the **Add Folder** button.
File*	Click **Browse** to locate the file and **Upload** to place the file in your folder location. Press **Clear** to remove the file.

Status	Select a status of **Active** or **Retired**.
Copyright	Enter copyright details for the multimedia file.
Keywords	Enter any keywords for the file.
*-required field	

After entering your information including the folder location, press **Create** to add the item to the multimedia library; this removes the item from the Home directory shown on the grid. Select the file and press **Add** at the Multimedia Library dialog to add the file to your question. Select **Save & New** to save the question and enter another or press **Save Changes** when you have finished.

Multimedia

A multimedia file can be attached to portray health promotion or risk factors as follows:



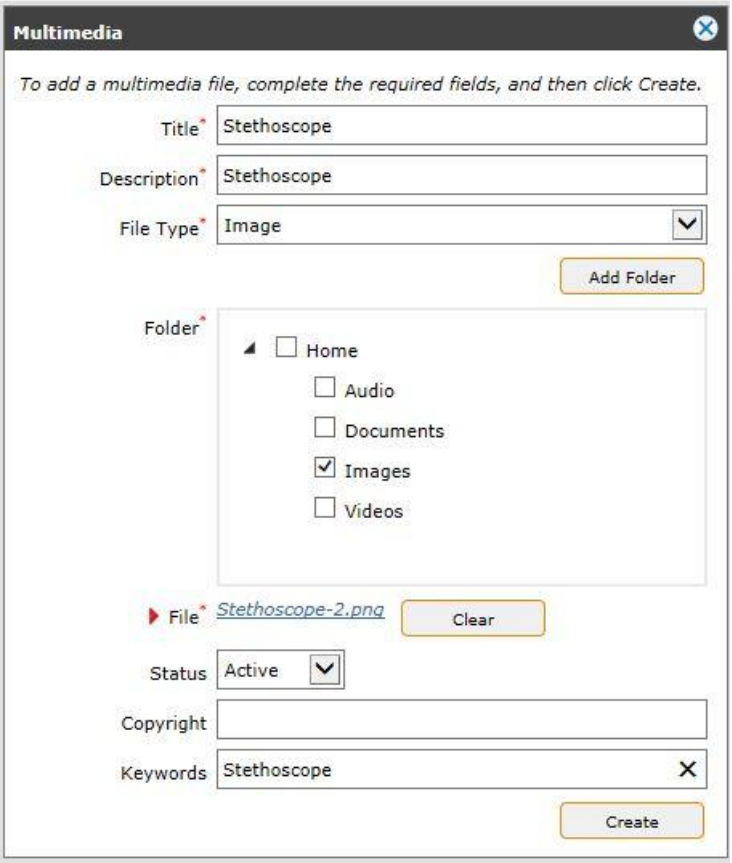
The following selections are available:

Field	Description
Add New	Select a multimedia file (e.g., .jpg, .wmv, .avi) from your PC. Browse for the file, press **Upload**, and **Save Changes** when finished (this populates the Support Files grid).
Add From Multimedia	Select a multimedia file from your multimedia library. Select the Search File Type (Audio, Video, Image, Document) by clicking the applicable checkboxes. The default search location is the multimedia Home directory; click the **Audio**, **Video**, **Image**, and **Document** subfolder checkboxes to search those locations. You can also enter text to narrow your search parameters within the results grid.

The multimedia grid appears with the folder view in the left column. If a multimedia item's file name has already been selected, it appears by default in the grid. Multimedia grid items can be sorted by name, type, title, and folder. You can also enter a search term in the text field to locate grid items.

For a thumbnail view of the file, click the **Switch to Thumbnail View** hyperlink.

You can also add a multimedia file to the multimedia library. Click the **Add to Multimedia Library** button to call up the following dialog (an example appears below):



Enter the following:

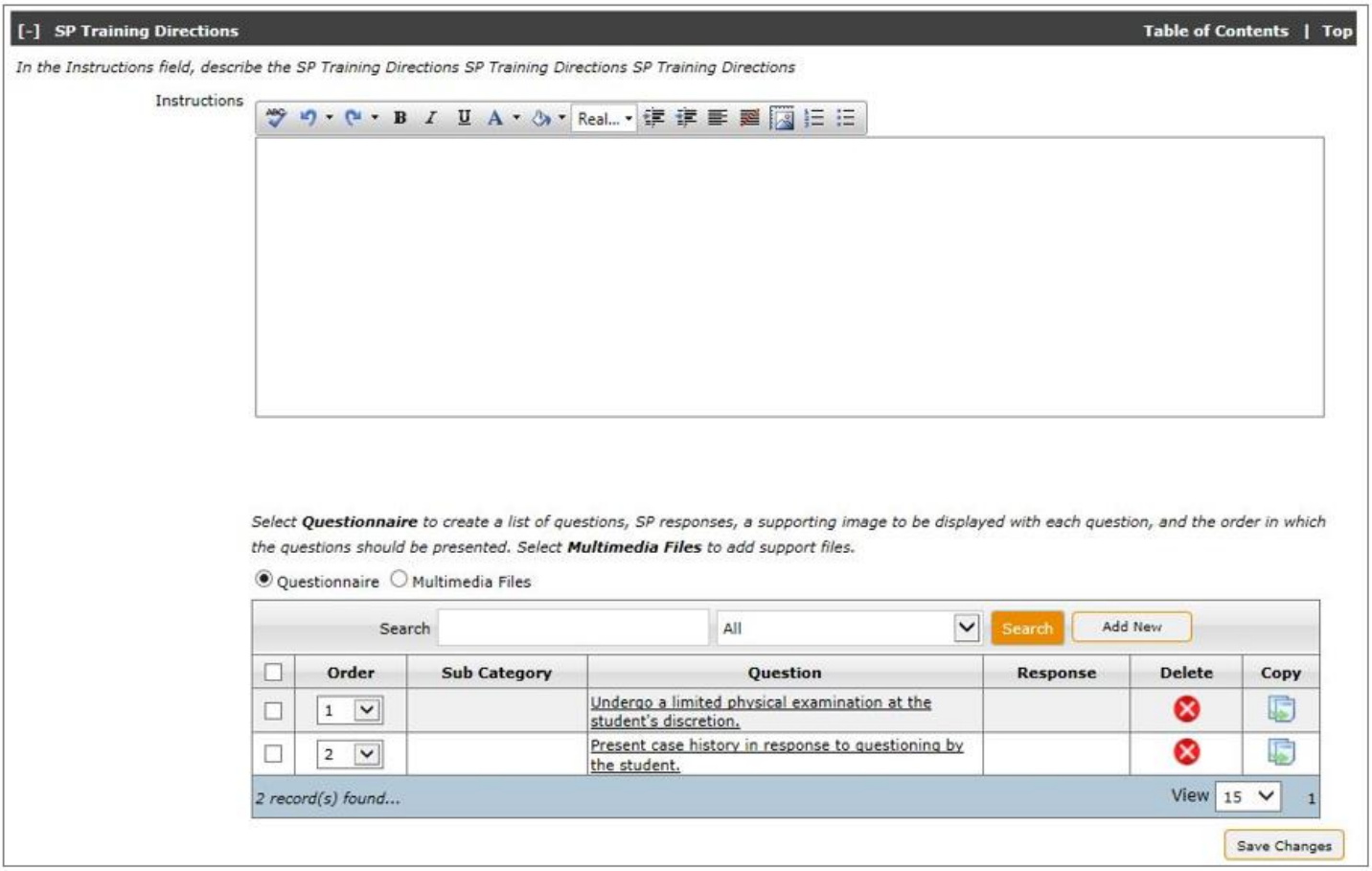
Field	Description
Title*	Enter the title of the multimedia file.
Description*	Enter a description of the multimedia file.
File Type*	Select a file type (Audio, Video, Image, Document).
Folder*	Click the arrow next to the Home folder to open up subfolder locations for the multimedia file. To create a new subfolder, click the **Add Folder** button.
File*	Click **Browse** to locate the file and **Upload** to place the file in your folder location. Press **Clear** to remove the file.
Status	Select a status of **Active** or **Retired**.
Copyright	Enter copyright details for the multimedia file.
Keywords	Enter any keywords for the file.
*-required field	

After entering your information including the folder location, press **Create** to add the item to the multimedia library; this removes the item from the Home directory shown on the grid. Select the file and press **Add** at the Multimedia Library dialog to add the file to your question.

Press **Save Changes** to retain the information at this section.

SP Training Directions

Note: If a Case Authoring document is associated with this training case, any documents associated with it appear at this section.



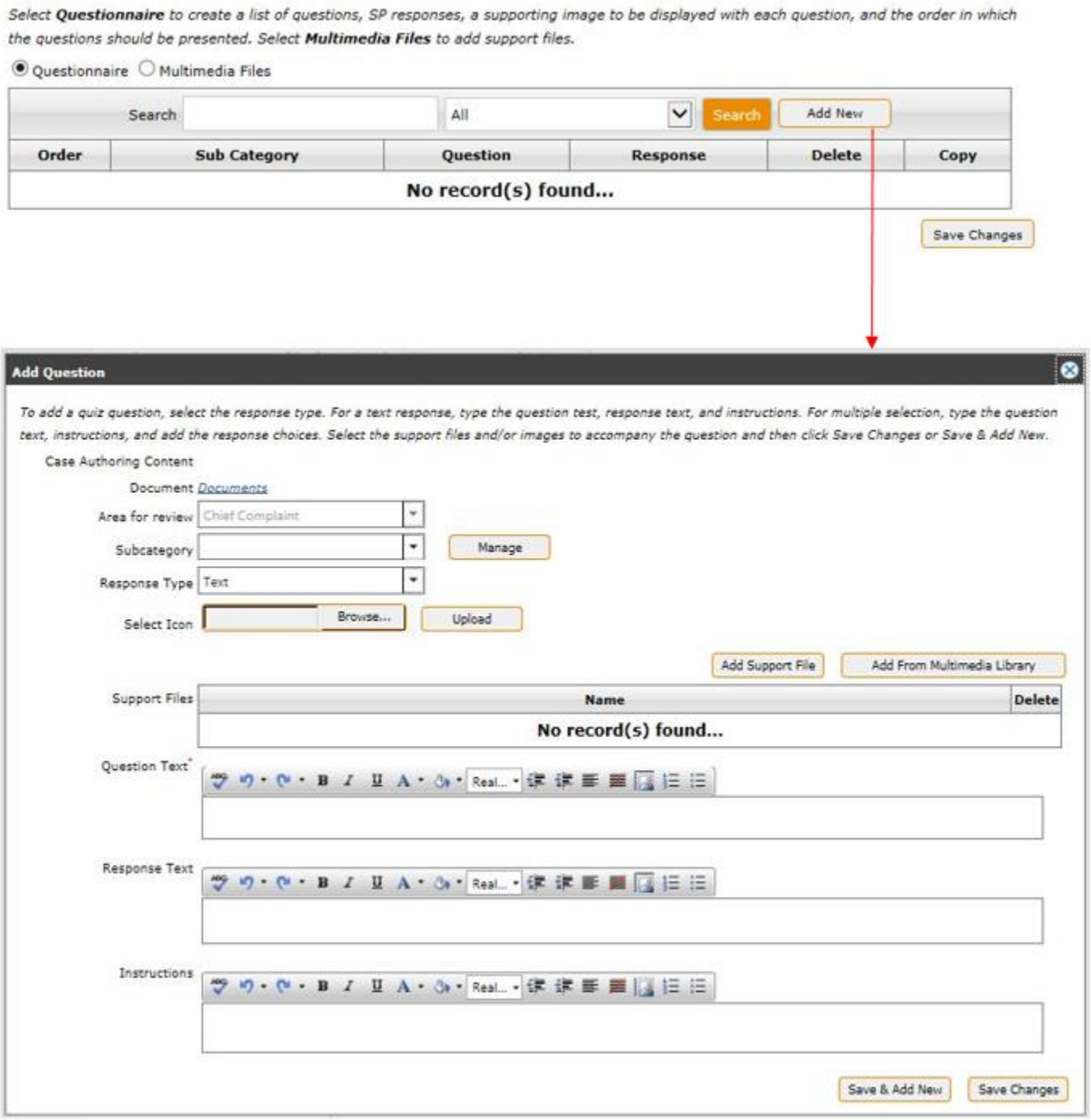
Enter the following in this section:

Field	Description
Instructions	Enter information related to SP training directions as part of the patient portrayal.
Questionnaire/	Select a questionnaire or multimedia file to be included in the patient

Multimedia Files	portrayal of training directions for SP review.

Questionnaire

A questionnaire can be attached to SP training directions as follows:

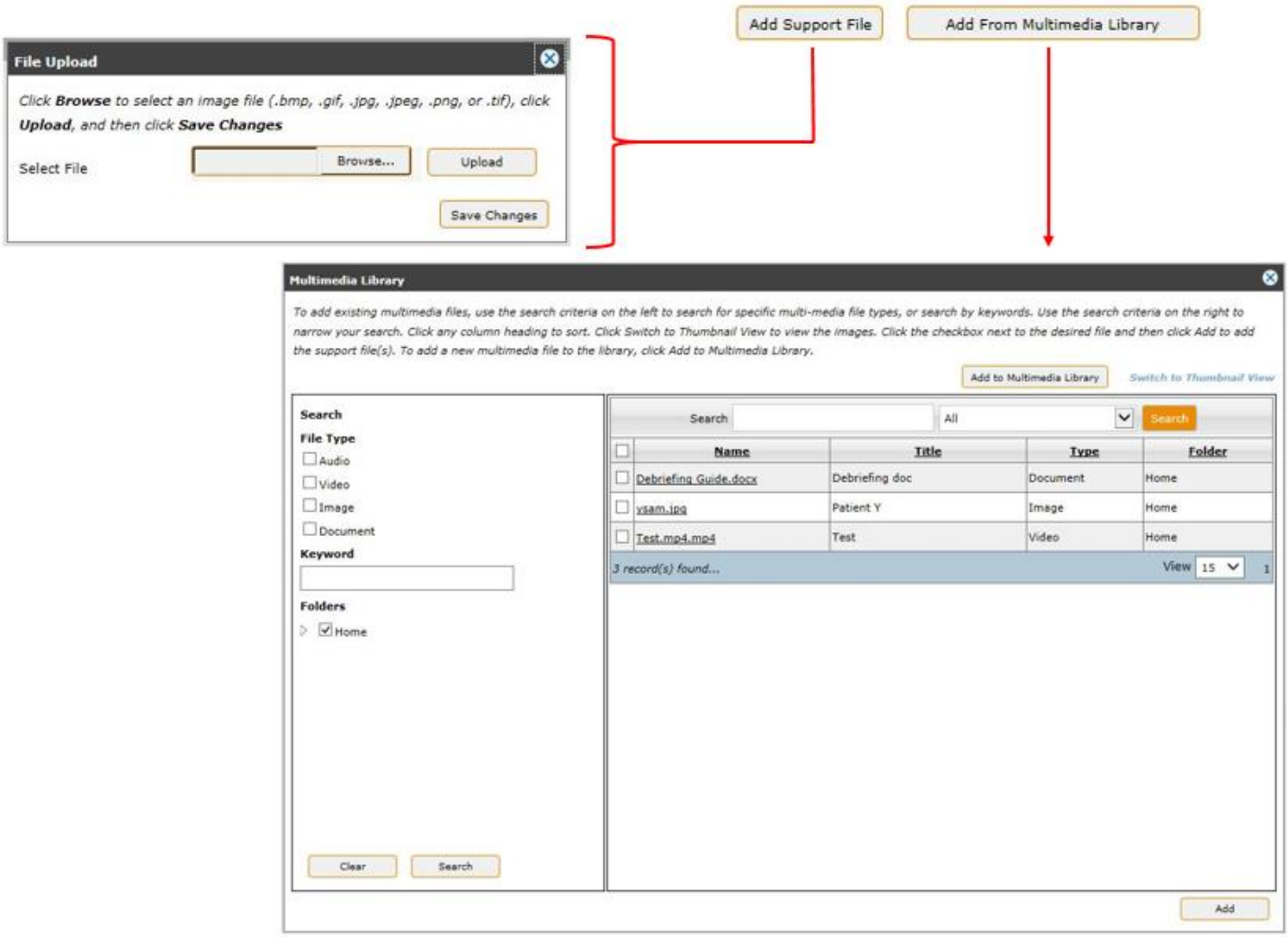


Note: Image altered for presentation purposes.

Enter the following information:

Field	Description
Area for Review	The current area for review (Chief Complaint, Social History, etc.) will be displayed.
Sub Category	Create a sub category if desired, such as HPI (History of Present Illness) or ROS (Review of Systems) under medical categories such as Chief Complaint or Medical History.
Response Type	This defaults to Text when adding a question to the training case.
Select Icon	Upload an icon from the multimedia library for use with a question and answer for easier recall by the SP.
Support Files	Add multimedia support files to illustrate points for the standardized patient.
Question Text	This is the anticipated question posed by the learner.
Response Text	This is the information the SP will learn and use when responding to the student.
Instructions	Enter a summary of the overall complaint (e.g., breathing problems)

From within the questionnaire selection, a multimedia file can be attached as follows:



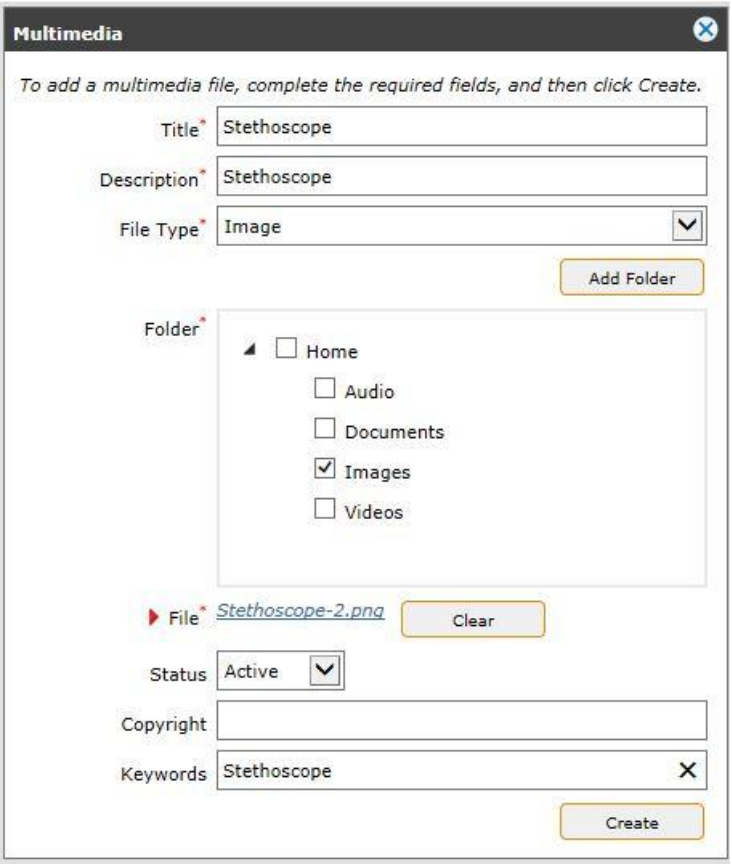
Enter the following information:

Field	Description
Add Support File	Select a multimedia file (e.g., .jpg, .wmv, .avi) from your PC. Browse for the file, press **Upload**, and **Save Changes** when finished.
Add From Multimedia Library	Select a multimedia file from your multimedia library. Select the Search File Type (Audio, Video, Image, Document) by clicking the applicable checkboxes. The default search location is the multimedia Home directory; click the **Audio**, **Video**, **Image**, and **Document** subfolder checkboxes to search those locations. You can also enter text to narrow your search parameters within the results grid.

The multimedia grid appears with the folder view in the left column. If a multimedia item's file name has already been selected, it appears by default in the grid. Multimedia grid items can be sorted by name, type, title, and folder. You can also enter a search term in the text field to locate grid items.

For a thumbnail view of the file, click the **Switch to Thumbnail View** hyperlink.

You can also add a multimedia file to the multimedia library. Click the **Add to Multimedia Library** button to call up the following dialog (an example appears below):



Enter the following:

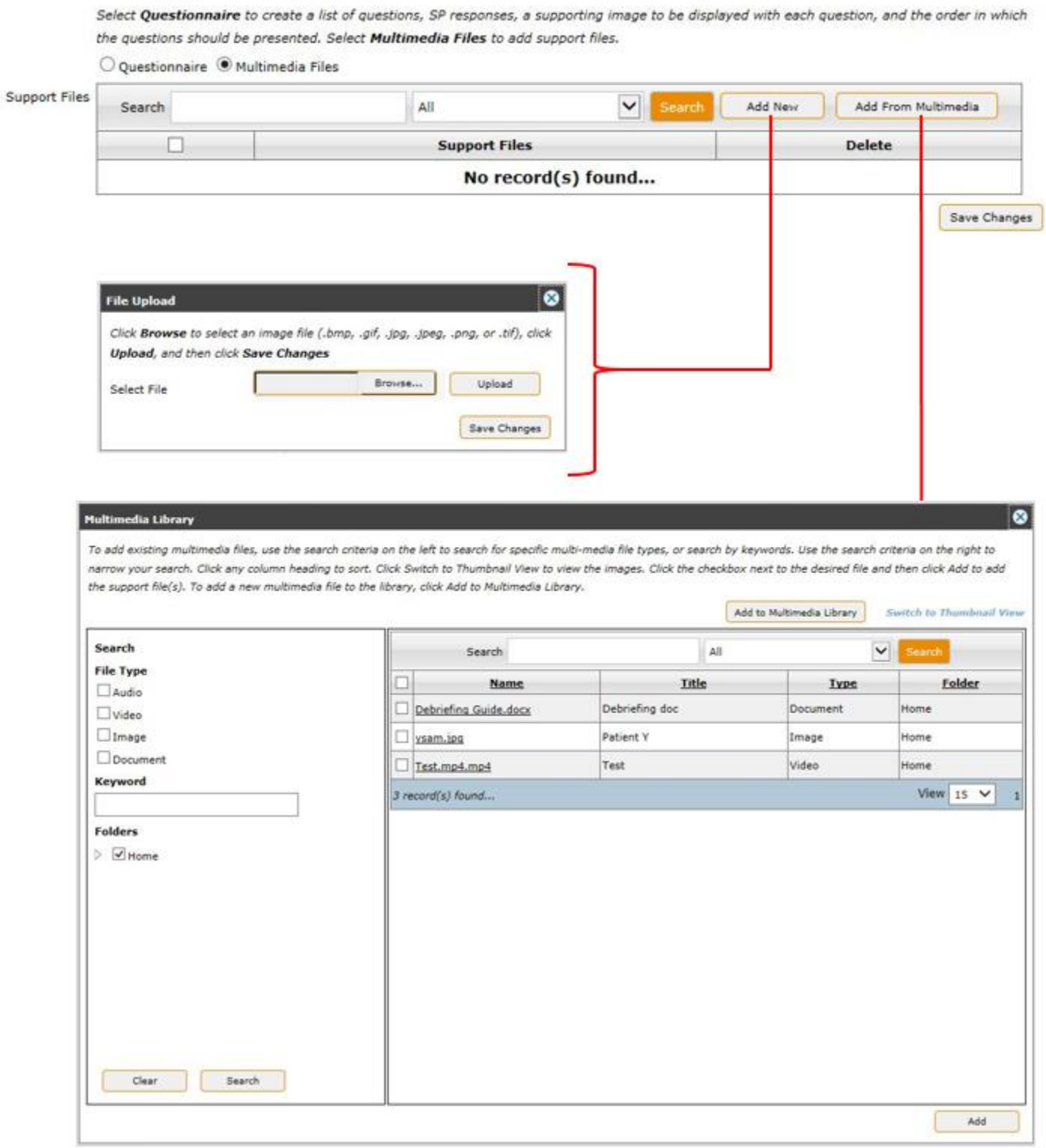
Field	Description
Title*	Enter the title of the multimedia file.
Description*	Enter a description of the multimedia file.
File Type*	Select a file type (Audio, Video, Image, Document).
Folder*	Click the arrow next to the Home folder to open up subfolder locations for the multimedia file. To create a new subfolder, click the **Add Folder** button.
File*	Click **Browse** to locate the file and **Upload** to place the file in your folder location. Press **Clear** to remove the file.

Status	Select a status of Active or Retired.
Copyright	Enter copyright details for the multimedia file.
Keywords	Enter any keywords for the file.
*-required field	

After entering your information including the folder location, press Create to add the item to the multimedia library; this removes the item from the Home directory shown on the grid. Select the file and press **Add** at the Multimedia Library dialog to add the file to your question. Select Save & New to save the question and enter another or press Save Changes when you have finished.

Multimedia

A multimedia file can be attached to the SP training directions as follows:



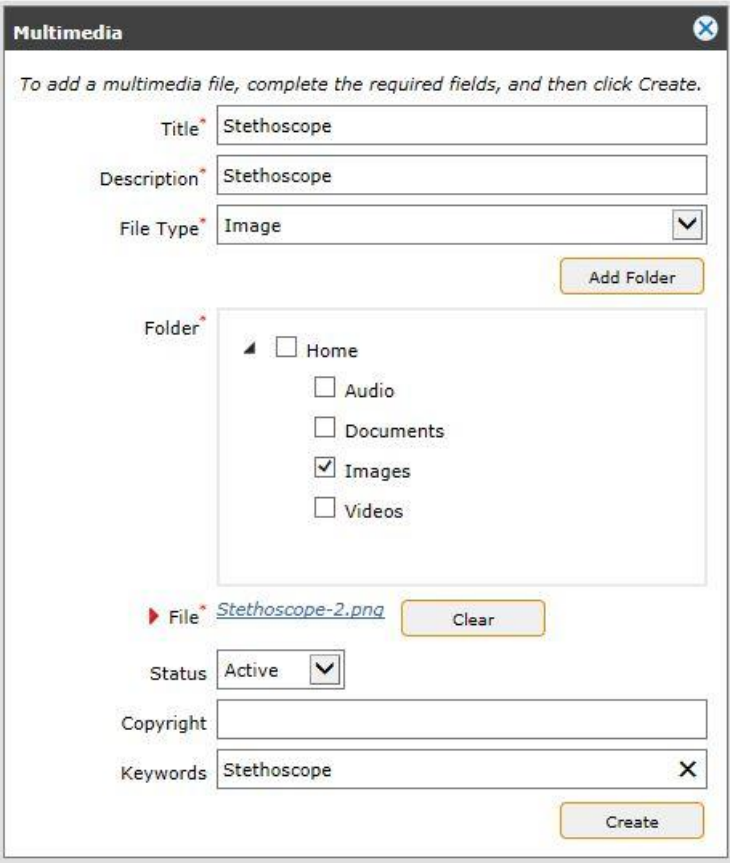
The following selections are available:

Field	Description
Add New	Select a multimedia file (e.g., .jpg, .wmv, .avi) from your PC. Browse for the file, press **Upload**, and **Save Changes** when finished (this populates the Support Files grid).
Add From Multimedia	Select a multimedia file from your multimedia library. Select the Search File Type (Audio, Video, Image, Document) by clicking the applicable checkboxes. The default search location is the multimedia Home directory; click the Audio, Video, Image, and Document subfolder checkboxes to search those locations. You can also enter text to narrow your search parameters within the results grid.

The multimedia grid appears with the folder view in the left column. If a multimedia item's file name has already been selected, it appears by default in the grid. Multimedia grid items can be sorted by name, type, title, and folder. You can also enter a search term in the text field to locate grid items.

For a thumbnail view of the file, click the Switch to Thumbnail View hyperlink.

You can also add a multimedia file to the multimedia library. Click the **Add to Multimedia Library** button to call up the following dialog (an example appears below):



Enter the following:

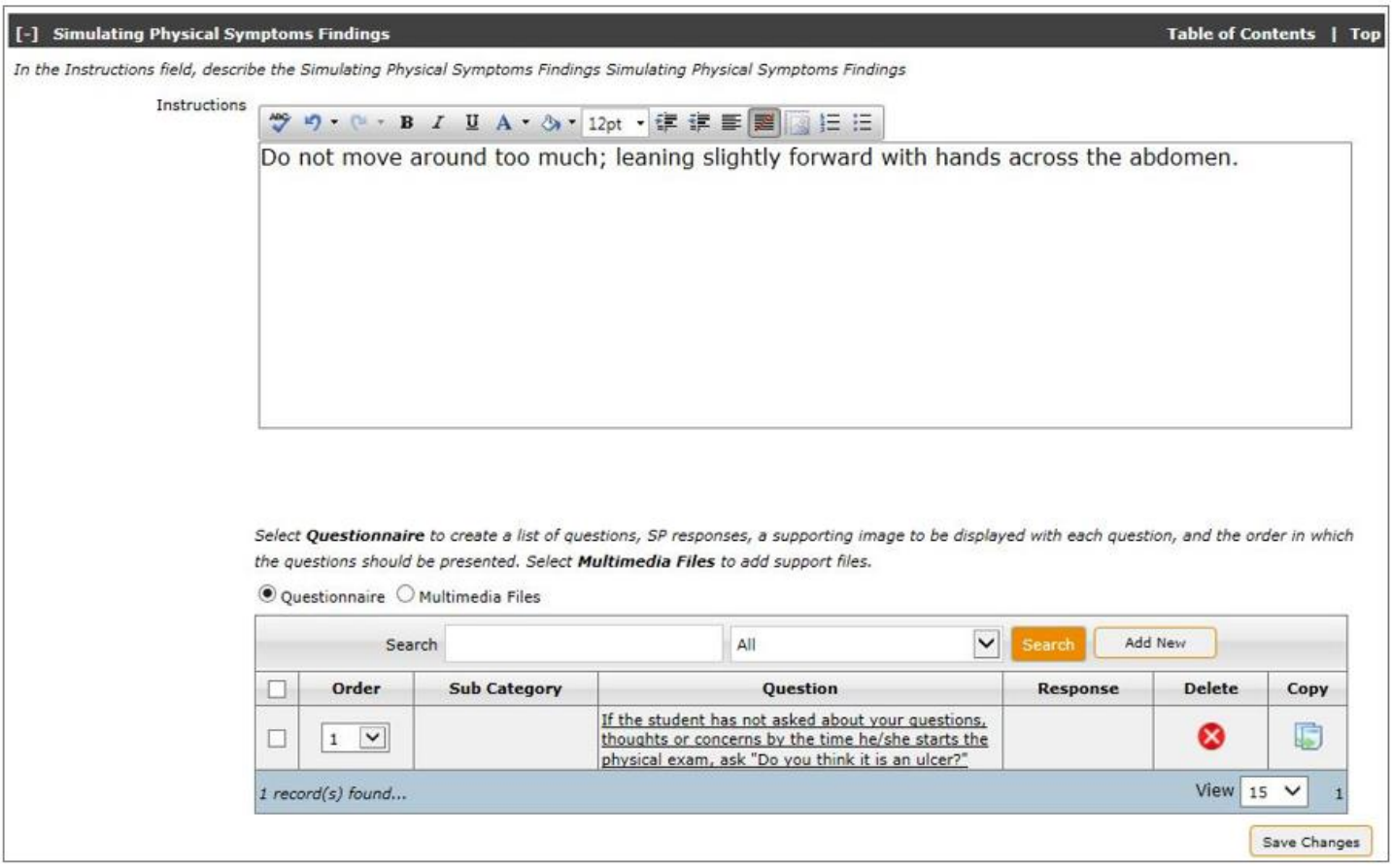
Field	Description
Title*	Enter the title of the multimedia file.
Description*	Enter a description of the multimedia file.
File Type*	Select a file type (Audio, Video, Image, Document).
Folder*	Click the arrow next to the Home folder to open up subfolder locations for the multimedia file. To create a new subfolder, click the **Add Folder** button.
File*	Click **Browse** to locate the file and **Upload** to place the file in your folder location. Press **Clear** to remove the file.
Status	Select a status of **Active** or **Retired**.
Copyright	Enter copyright details for the multimedia file.
Keywords	Enter any keywords for the file.
*-required field	

After entering your information including the folder location, press **Create** to add the item to the multimedia library; this removes the item from the Home directory shown on the grid. Select the file and press **Add** at the Multimedia Library dialog to add the file to your question.

Press **Save Changes** to retain the information at this section.

Simulating Physical Symptoms Finding

Note: If a Case Authoring document is associated with this training case, any documents associated with it appear at this section.



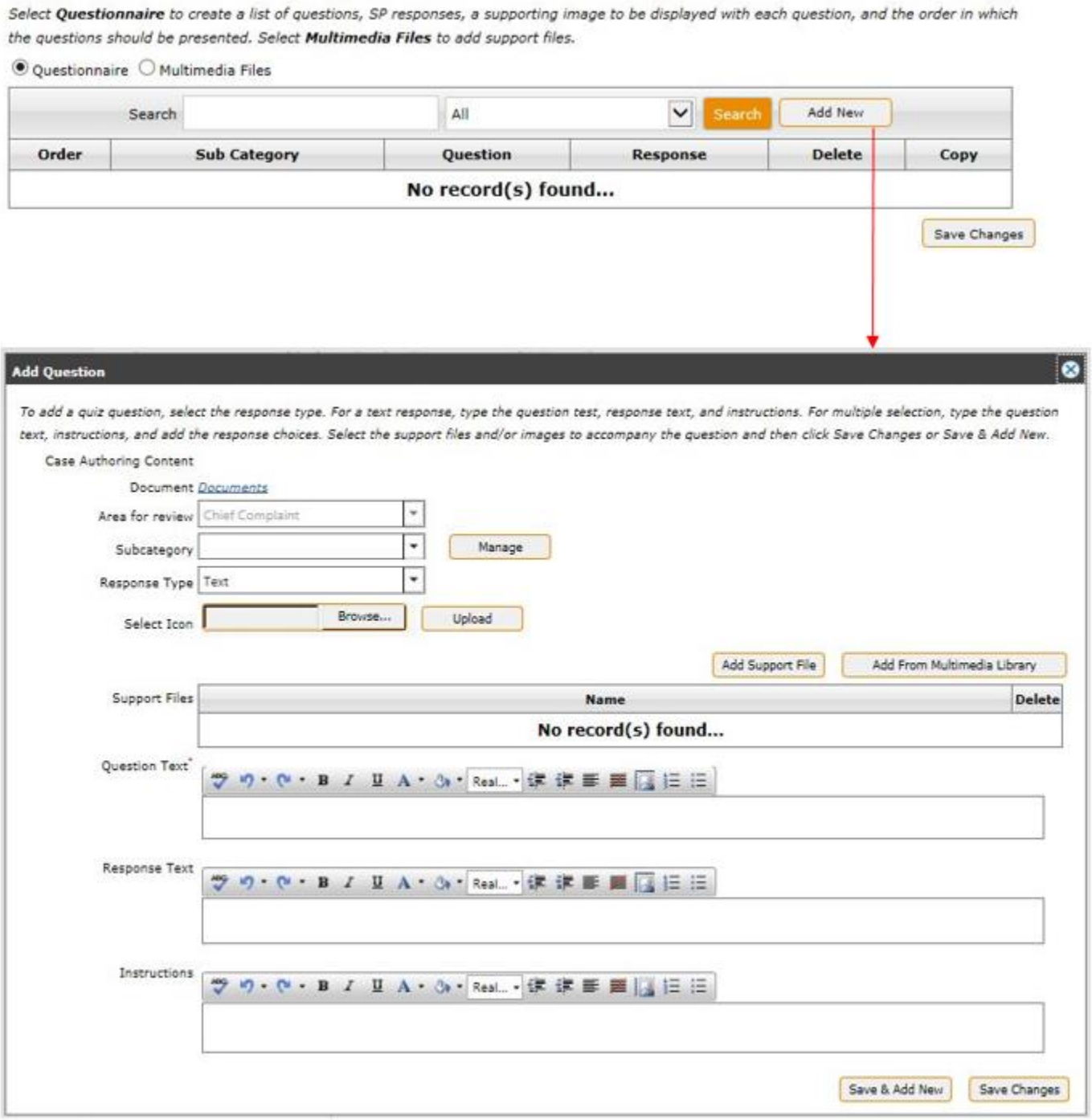
Enter the following in this section:

Field	Description
Instructions	Enter information related to simulating the finding of physical symptoms as part of the patient portrayal.
Questionnaire/ Multimedia	Select a questionnaire or multimedia file to be included in the finding of physical symptoms for SP review.

Files	

Questionnaire

A questionnaire can be attached to help with diagnosing physical symptoms as follows:

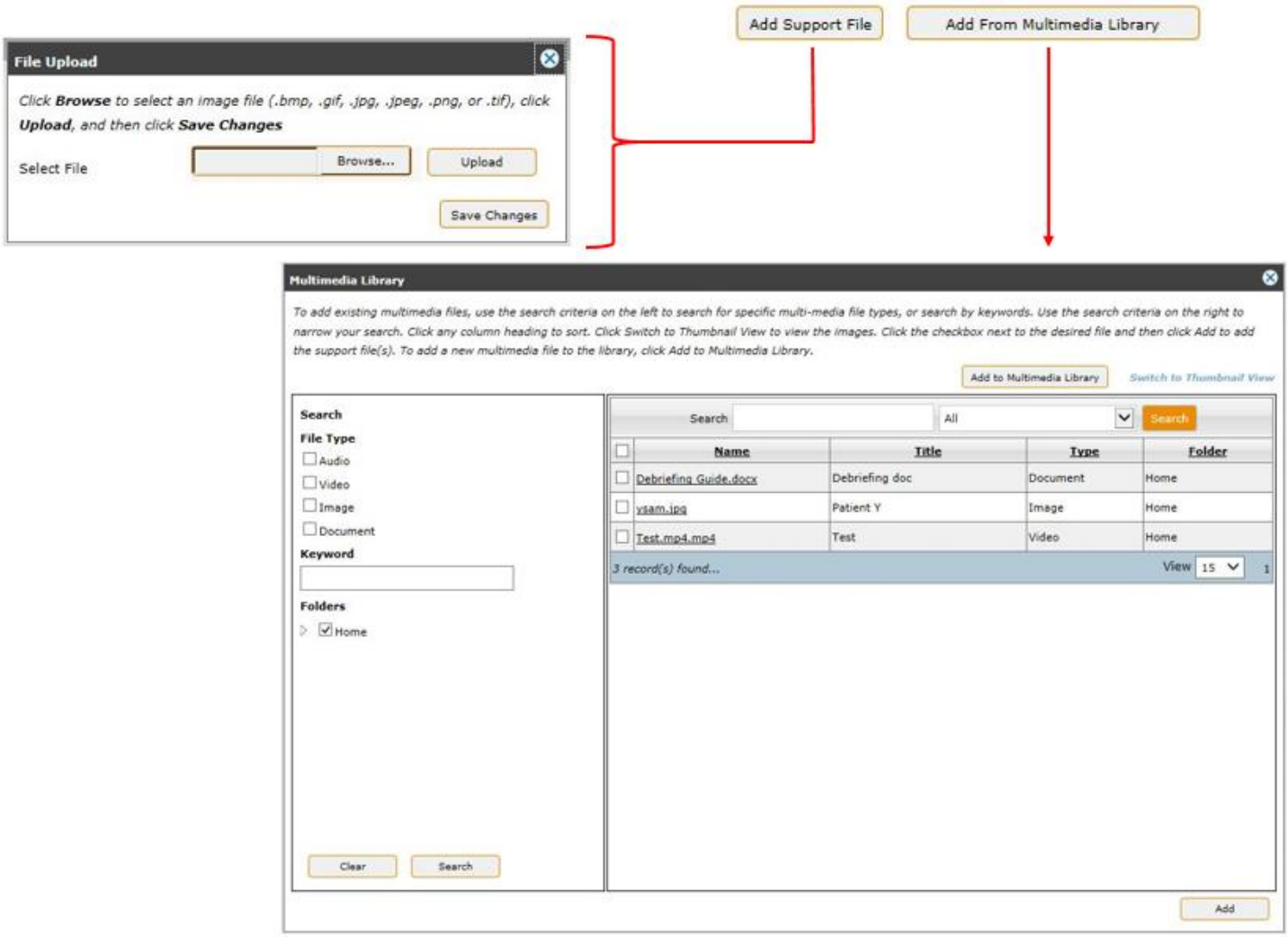


Note: Image altered for presentation purposes.

Enter the following information:

Field	Description
Area for Review	The current area for review (Chief Complaint, Social History, etc.) will be displayed.
Sub Category	Create a sub category if desired, such as HPI (History of Present Illness) or ROS (Review of Systems) under medical categories such as Chief Complaint or Medical History.
Response Type	This defaults to Text when adding a question to the training case.
Select Icon	Upload an icon from the multimedia library for use with a question and answer for easier recall by the SP.
Support Files	Add multimedia support files to illustrate points for the standardized patient.
Question Text	This is the anticipated question posed by the learner.
Response Text	This is the information the SP will learn and use when responding to the student.
Instructions	Enter a summary of the overall complaint (e.g., breathing problems)

From within the questionnaire selection, a multimedia file can be attached as follows:



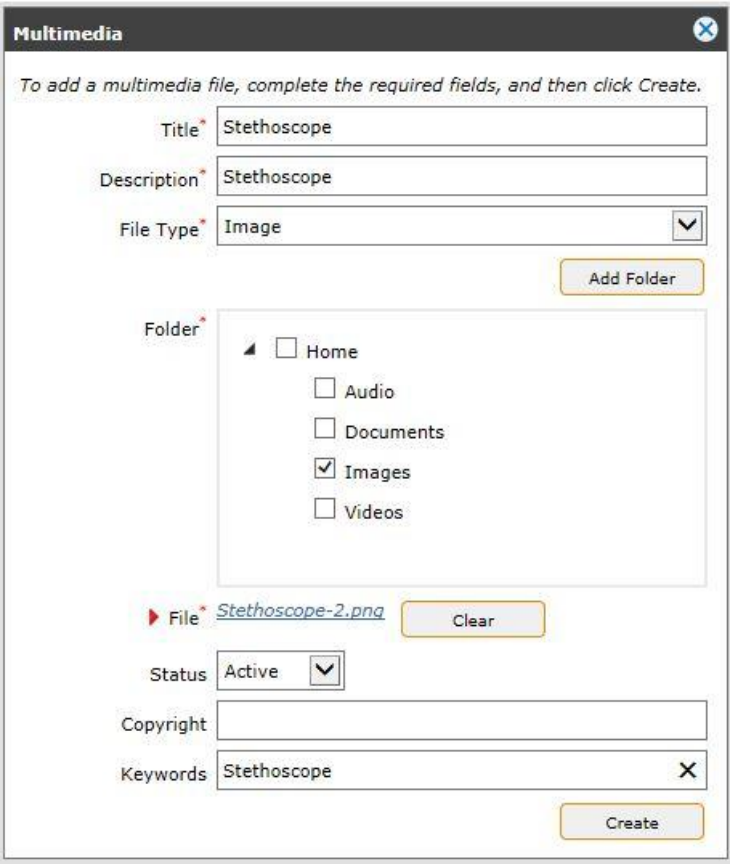
Enter the following information:

Field	Description
Add Support File	Select a multimedia file (e.g., .jpg, .wmv, .avi) from your PC. Browse for the file, press **Upload**, and **Save Changes** when finished.
Add From Multimedia Library	Select a multimedia file from your multimedia library. Select the Search File Type (Audio, Video, Image, Document) by clicking the applicable checkboxes. The default search location is the multimedia Home directory; click the **Audio**, **Video**, **Image**, and **Document** subfolder checkboxes to search those locations. You can also enter text to narrow your search parameters within the results grid.

The multimedia grid appears with the folder view in the left column. If a multimedia item's file name has already been selected, it appears by default in the grid. Multimedia grid items can be sorted by name, type, title, and folder. You can also enter a search term in the text field to locate grid items.

For a thumbnail view of the file, click the **Switch to Thumbnail View** hyperlink.

You can also add a multimedia file to the multimedia library. Click the **Add to Multimedia Library** button to call up the following dialog (an example appears below):



Enter the following:

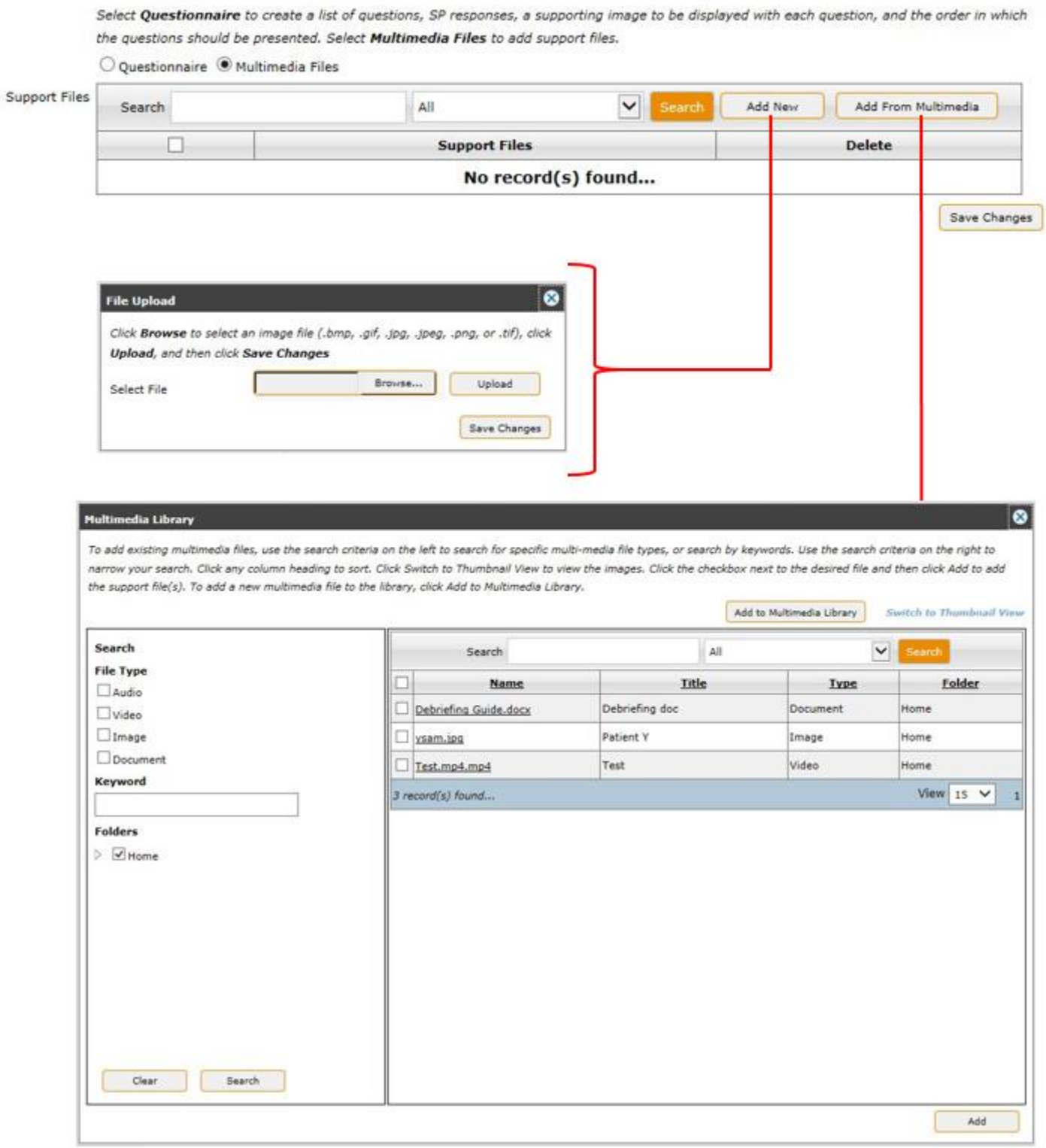
Field	Description
Title*	Enter the title of the multimedia file.
Description*	Enter a description of the multimedia file.
File Type*	Select a file type (Audio, Video, Image, Document).
Folder*	Click the arrow next to the Home folder to open up subfolder locations for the multimedia file. To create a new subfolder, click the Add Folder button.
File*	Click **Browse** to locate the file and **Upload** to place the file in your folder location. Press **Clear** to remove the file.

Status	Select a status of **Active** or **Retired**.
Copyright	Enter copyright details for the multimedia file.
Keywords	Enter any keywords for the file.
*-required field	

After entering your information including the folder location, press **Create** to add the item to the multimedia library; this removes the item from the Home directory shown on the grid. Select the file and press **Add** at the Multimedia Library dialog to add the file to your question. Select **Save & New** to save the question and enter another or press **Save Changes** when you have finished.

Multimedia

A multimedia file can be attached to the physical symptoms section of the case as follows:



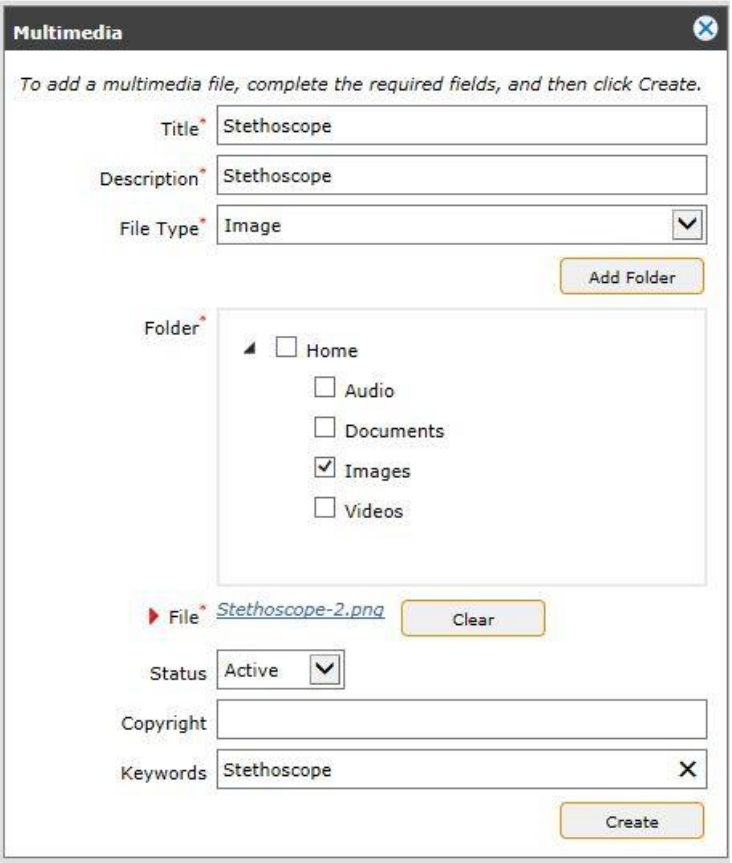
The following selections are available:

Field	Description
Add New	Select a multimedia file (e.g., .jpg, .wmv, .avi) from your PC. Browse for the file, press **Upload**, and **Save Changes** when finished (this populates the Support Files grid).
Add From Multimedia	Select a multimedia file from your multimedia library. Select the Search File Type (Audio, Video, Image, Document) by clicking the applicable checkboxes. The default search location is the multimedia Home directory; click the **Audio**, **Video**, **Image**, and **Document** subfolder checkboxes to search those locations. You can also enter text to narrow your search parameters within the results grid.

The multimedia grid appears with the folder view in the left column. If a multimedia item's file name has already been selected, it appears by default in the grid. Multimedia grid items can be sorted by name, type, title, and folder. You can also enter a search term in the text field to locate grid items.

For a thumbnail view of the file, click the **Switch to Thumbnail View** hyperlink.

You can also add a multimedia file to the multimedia library. Click the **Add to Multimedia Library button** to call up the following dialog (an example appears below):



Enter the following:

Field	Description
Title*	Enter the title of the multimedia file.
Description*	Enter a description of the multimedia file.
File Type*	Select a file type (Audio, Video, Image, Document).
Folder*	Click the arrow next to the Home folder to open up subfolder locations for the multimedia file. To create a new subfolder, click the **Add Folder** button.
File*	Click **Browse** to locate the file and **Upload** to place the file in your folder location. Press **Clear** to remove the file.
Status	Select a status of **Active** or **Retired**.
Copyright	Enter copyright details for the multimedia file.
Keywords	Enter any keywords for the file.
*-required field	

After entering your information including the folder location, press **Create** to add the item to the multimedia library; this removes the item from the Home directory shown on the grid. Select the file and press **Add** at the Multimedia Library dialog to add the file to your question.

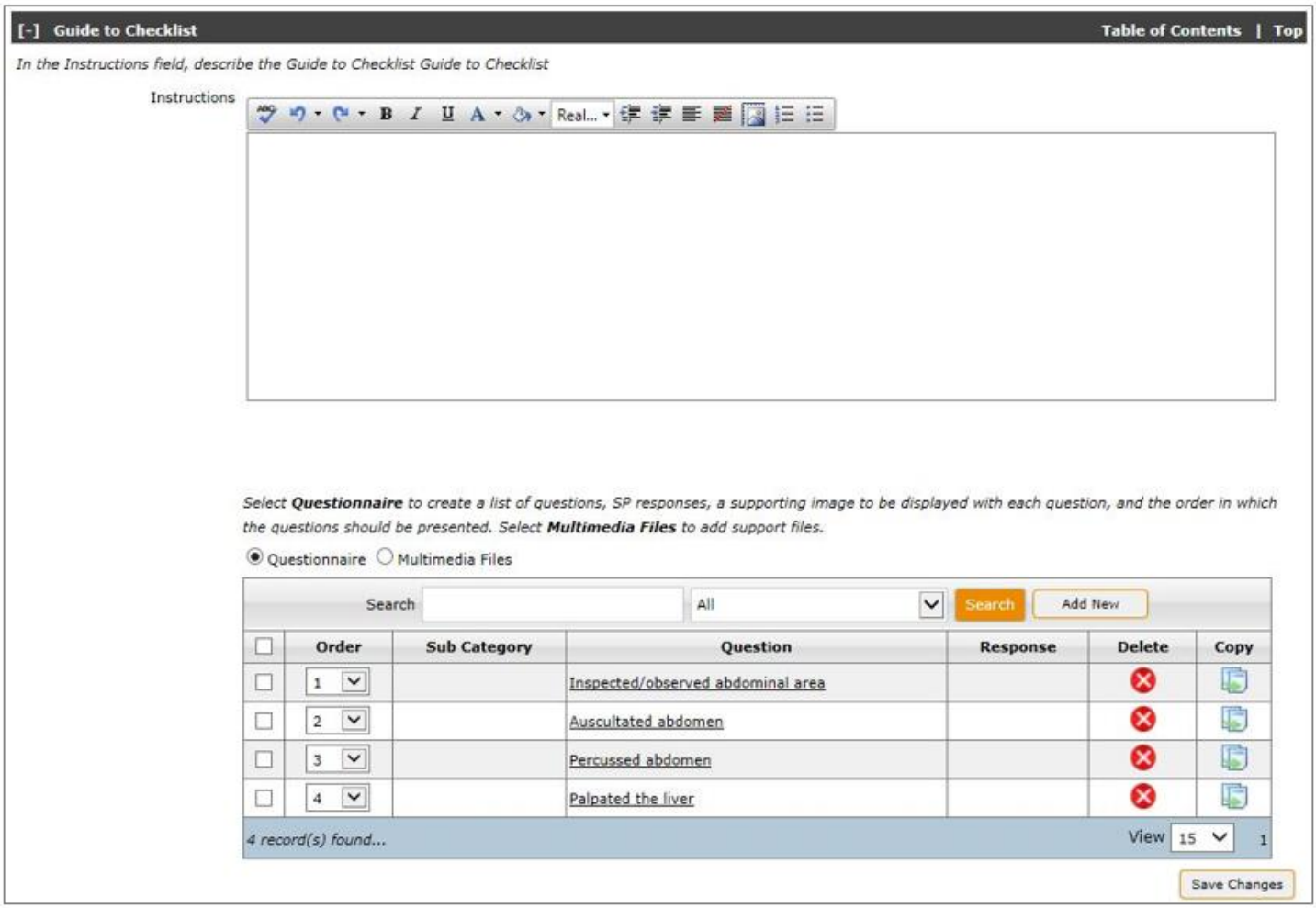
Press **Save Changes** to retain the information at this section.

Guide to Checklist

Note: If a Case Authoring document is associated with this training case, any documents associated with it appear at this section.

The SP Checklist is the tool that the SP uses to evaluate the student. The SP is asked to indicate if the student did or did not ask a particular question or perform a particular physical exam.

The Guide to Checklist Area for Review details for the SP the items that will be presented as a part of the SP checklist. In addition, it offers the opportunity to *show* the SP the examination as it should be performed via a digital video clip and *tell* the SP specific information about the checklist item.

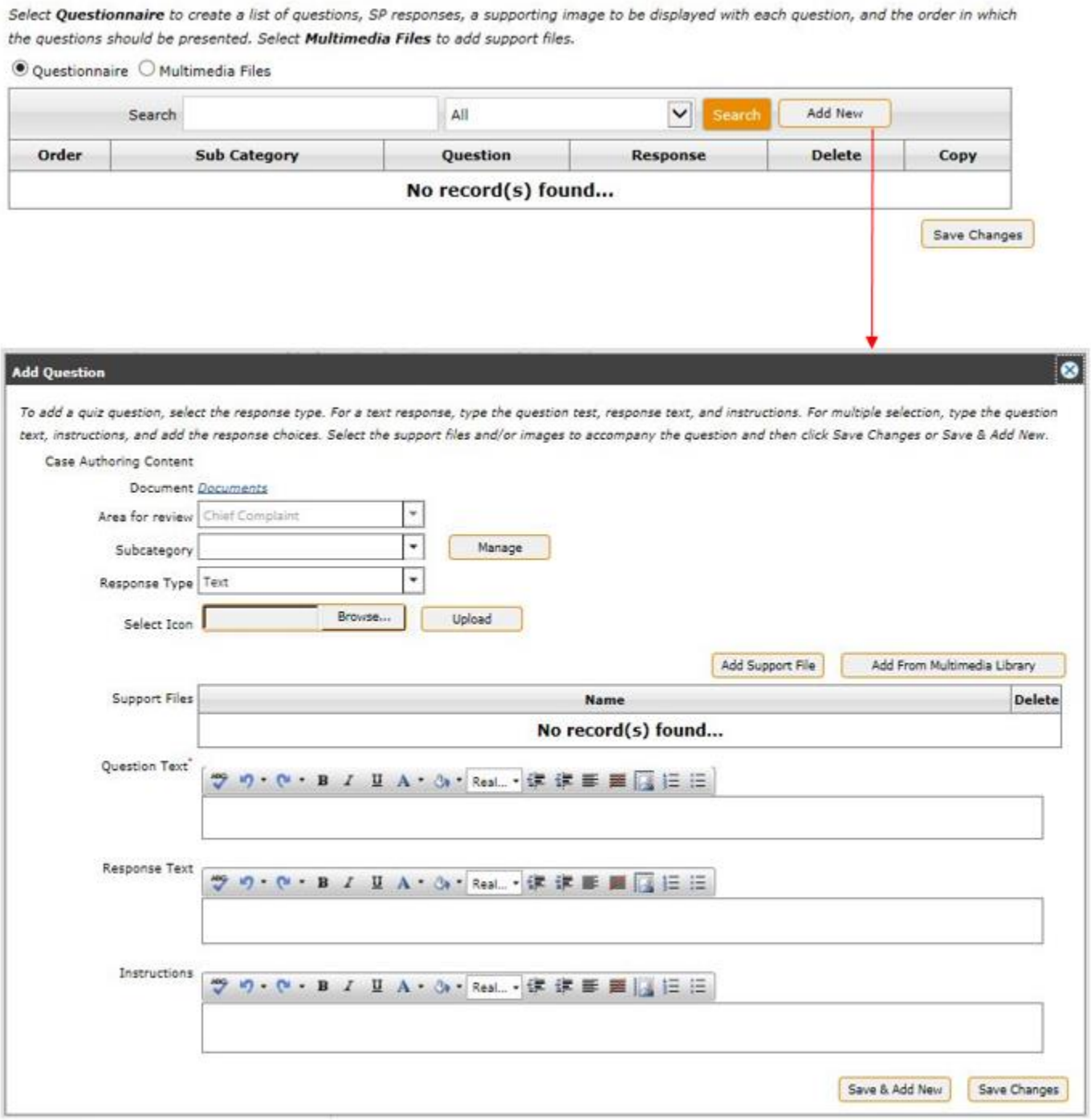


Enter the following in this section:

Field	Description
Instructions	Enter checklist items as part of the patient portrayal.
Questionnaire/ Multimedia Files	Select a questionnaire or multimedia file to be included as a checklist item.

Questionnaire

A questionnaire can be attached to the Guide to Checklist section as follows:

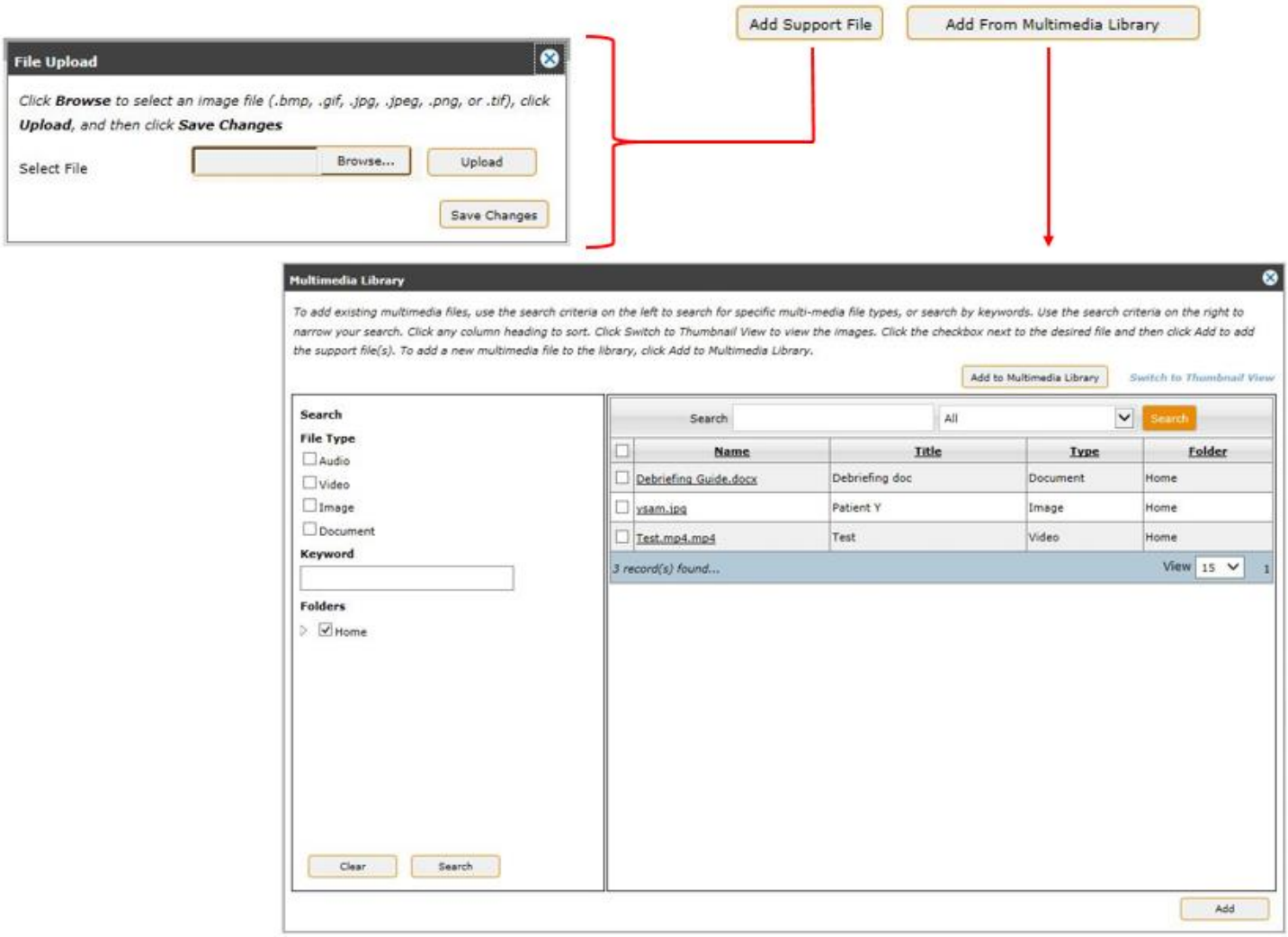


Note: Image altered for presentation purposes.

Enter the following information:

Field	Description
Area for Review	The current area for review (Chief Complaint, Social History, etc.) will be displayed.
Sub Category	Create a sub category if desired, such as HPI (History of Present Illness) or ROS (Review of Systems) under medical categories such as Chief Complaint or Medical History.
Response Type	This defaults to Text when adding a question to the training case.
Select Icon	Upload an icon from the multimedia library for use with a question and answer for easier recall by the SP.
Support Files	Add multimedia support files to illustrate points for the standardized patient.
Question Text	This is the anticipated question posed by the learner.
Response Text	This is the information the SP will learn and use when responding to the student.
Instructions	Enter a summary of the overall complaint (e.g., breathing problems)

From within the questionnaire selection, a multimedia file can be attached as follows:



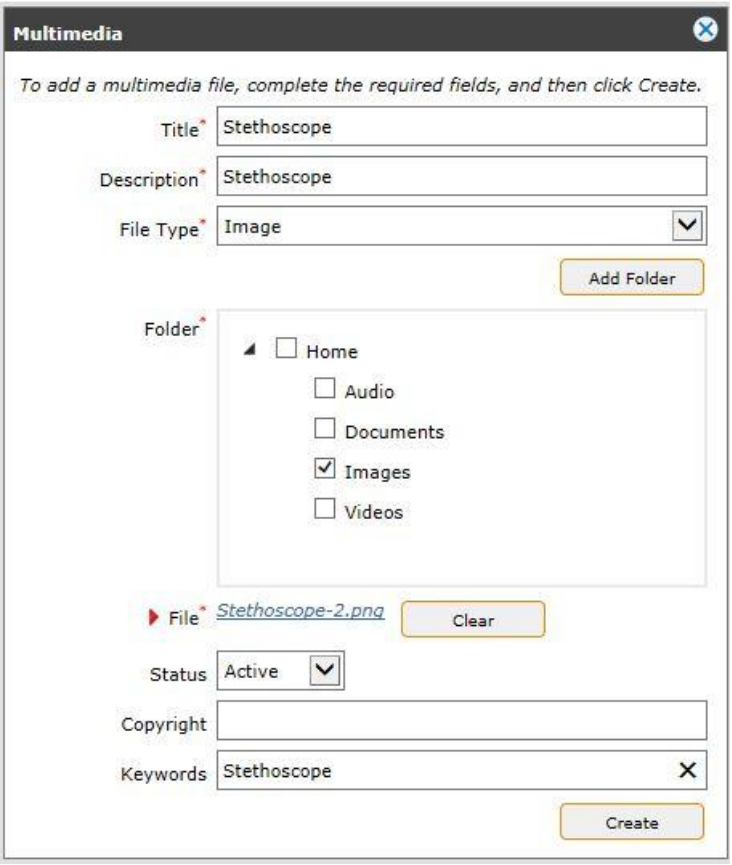
Enter the following information:

Field	Description
Add Support File	Select a multimedia file (e.g., .jpg, .wmv, .avi) from your PC. Browse for the file, press **Upload**, and **Save Changes** when finished.
Add From Multimedia Library	Select a multimedia file from your multimedia library. Select the Search File Type (Audio, Video, Image, Document) by clicking the applicable checkboxes. The default search location is the multimedia Home directory; click the **Audio**, **Video**, **Image**, and **Document** subfolder checkboxes to search those locations. You can also enter text to narrow your search parameters within the results grid.

The multimedia grid appears with the folder view in the left column. If a multimedia item's file name has already been selected, it appears by default in the grid. Multimedia grid items can be sorted by name, type, title, and folder. You can also enter a search term in the text field to locate grid items.

For a thumbnail view of the file, click the **Switch to Thumbnail View** hyperlink.

You can also add a multimedia file to the multimedia library. Click the **Add to Multimedia Library** button to call up the following dialog (an example appears below):



Enter the following:

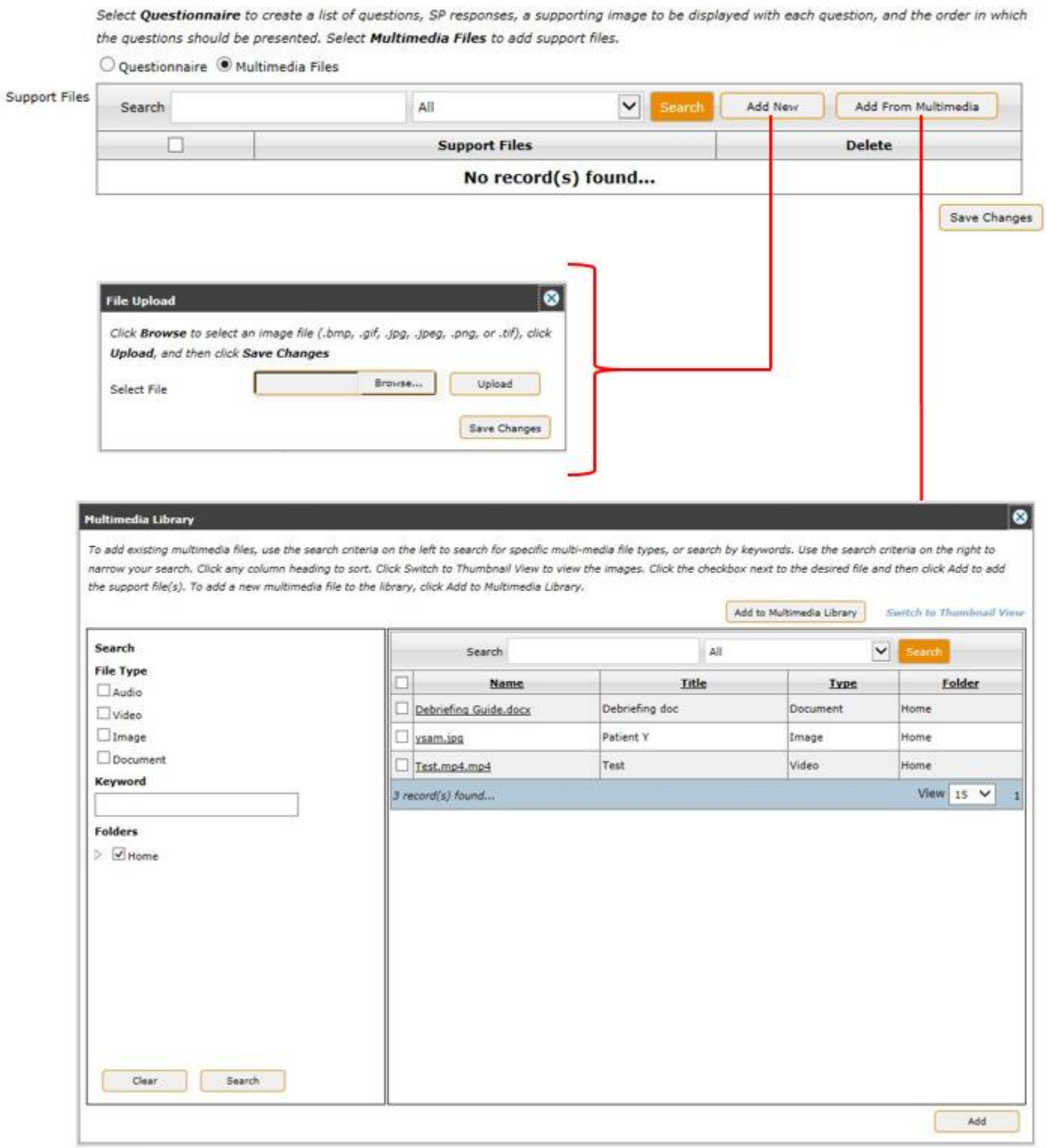
Field	Description
Title*	Enter the title of the multimedia file.
Description*	Enter a description of the multimedia file.
File Type*	Select a file type (Audio, Video, Image, Document).
Folder*	Click the arrow next to the Home folder to open up subfolder locations for the multimedia file. To create a new subfolder, click the **Add Folder** button.
File*	Click **Browse** to locate the file and **Upload** to place the file in your folder location. Press **Clear** to remove the file.

Status	Select a status of **Active** or **Retired**.
Copyright	Enter copyright details for the multimedia file.
Keywords	Enter any keywords for the file.
*-required field	

After entering your information including the folder location, press **Create** to add the item to the multimedia library; this removes the item from the Home directory shown on the grid. Select the file and press **Add** at the Multimedia Library dialog to add the file to your question. Select **Save & New** to save the question and enter another or press **Save Changes** when you have finished.

Multimedia

A multimedia file can be attached to the Guide to Checklist section as follows:



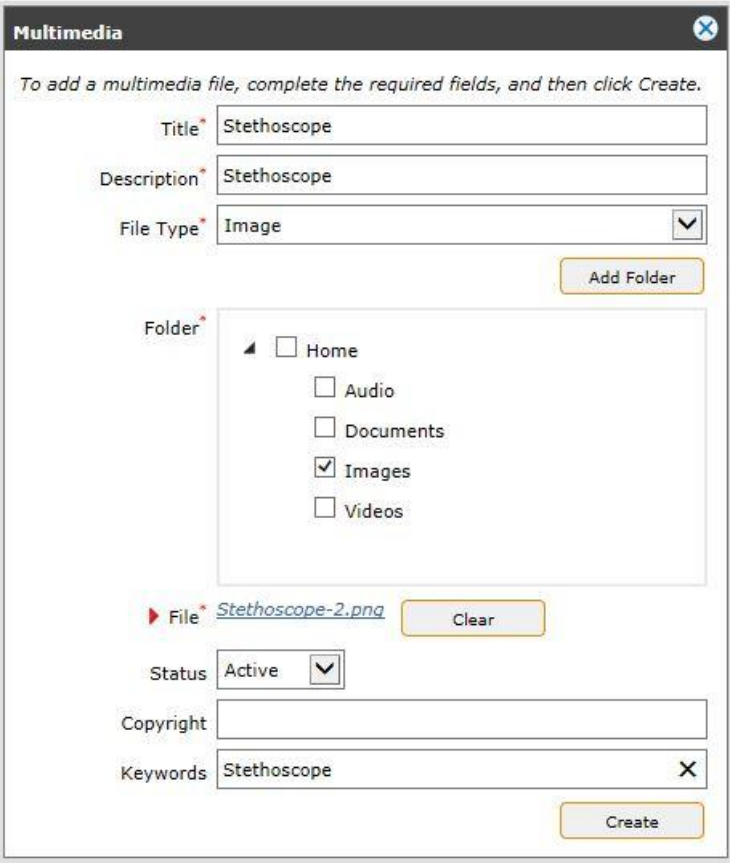
The following selections are available:

Field	Description
Add New	Select a multimedia file (e.g., .jpg, .wmv, .avi) from your PC. Browse for the file, press **Upload**, and **Save Changes** when finished (this populates the Support Files grid).
Add From Multimedia	Select a multimedia file from your multimedia library. Select the Search File Type (Audio, Video, Image, Document) by clicking the applicable checkboxes. The default search location is the multimedia Home directory; click the **Audio**, **Video**, **Image**, and **Document** subfolder checkboxes to search those locations. You can also enter text to narrow your search parameters within the results grid.

The multimedia grid appears with the folder view in the left column. If a multimedia item's file name has already been selected, it appears by default in the grid. Multimedia grid items can be sorted by name, type, title, and folder. You can also enter a search term in the text field to locate grid items.

For a thumbnail view of the file, click the **Switch to Thumbnail View** hyperlink.

You can also add a multimedia file to the multimedia library. Click the **Add to Multimedia Library** button to call up the following dialog (an example appears below):



Enter the following:

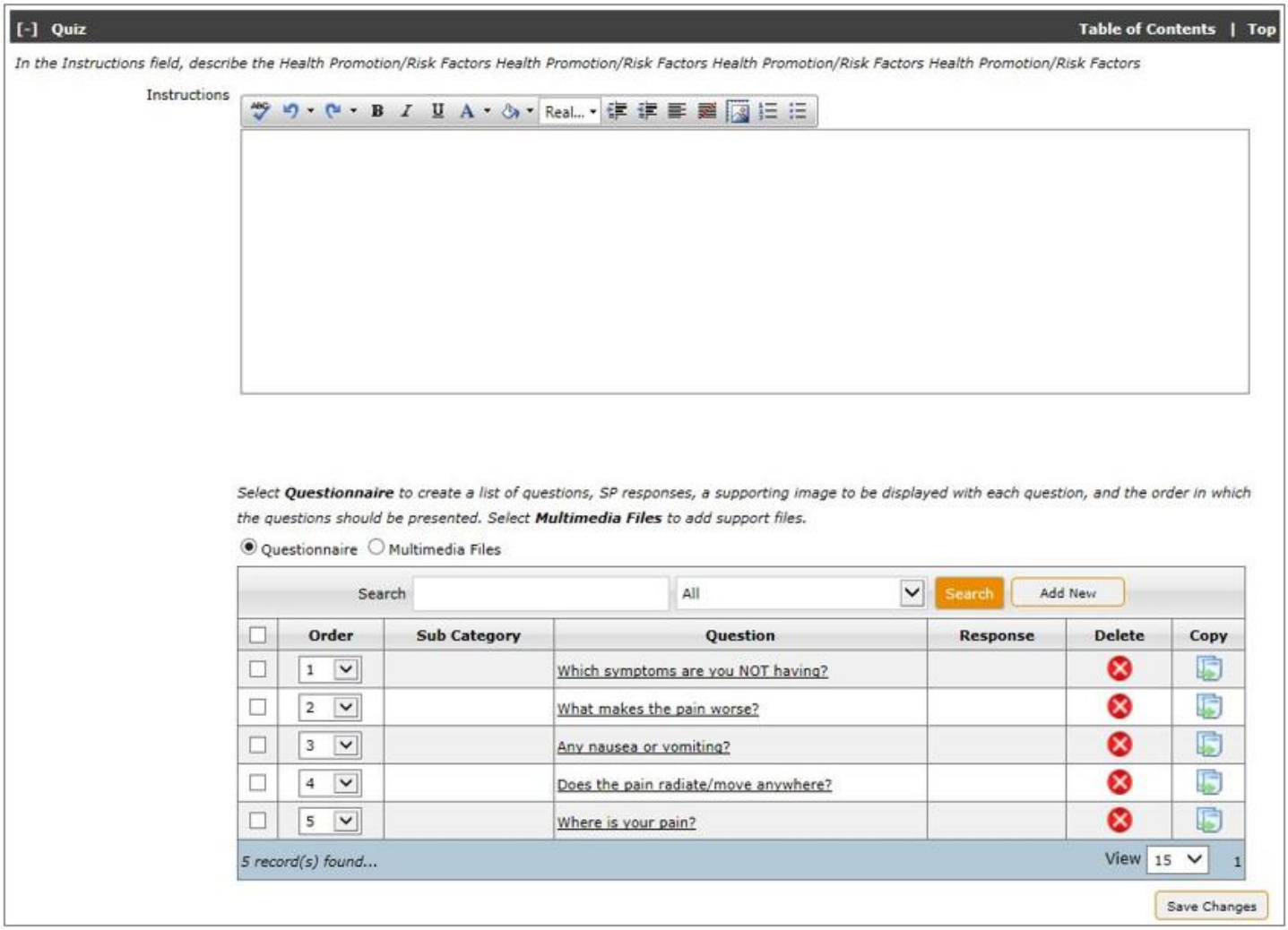
Field	Description
Title*	Enter the title of the multimedia file.
Description*	Enter a description of the multimedia file.
File Type*	Select a file type (Audio, Video, Image, Document).
Folder*	Click the arrow next to the Home folder to open up subfolder locations for the multimedia file. To create a new subfolder, click the Add Folder button.
File*	Click **Browse** to locate the file and **Upload** to place the file in your folder location. Press **Clear** to remove the file.
Status	Select a status of **Active** or **Retired**.
Copyright	Enter copyright details for the multimedia file.
Keywords	Enter any keywords for the file.
*-required field	

After entering your information including the folder location, press **Create** to add the item to the multimedia library; this removes the item from the Home directory shown on the grid. Select the file and press **Add** at the Multimedia Library dialog to add the file to your question.

Press **Save Changes** to retain the information at this section.

Case Trainer Quiz

The Quiz section of the Case Trainer page appears as follows:



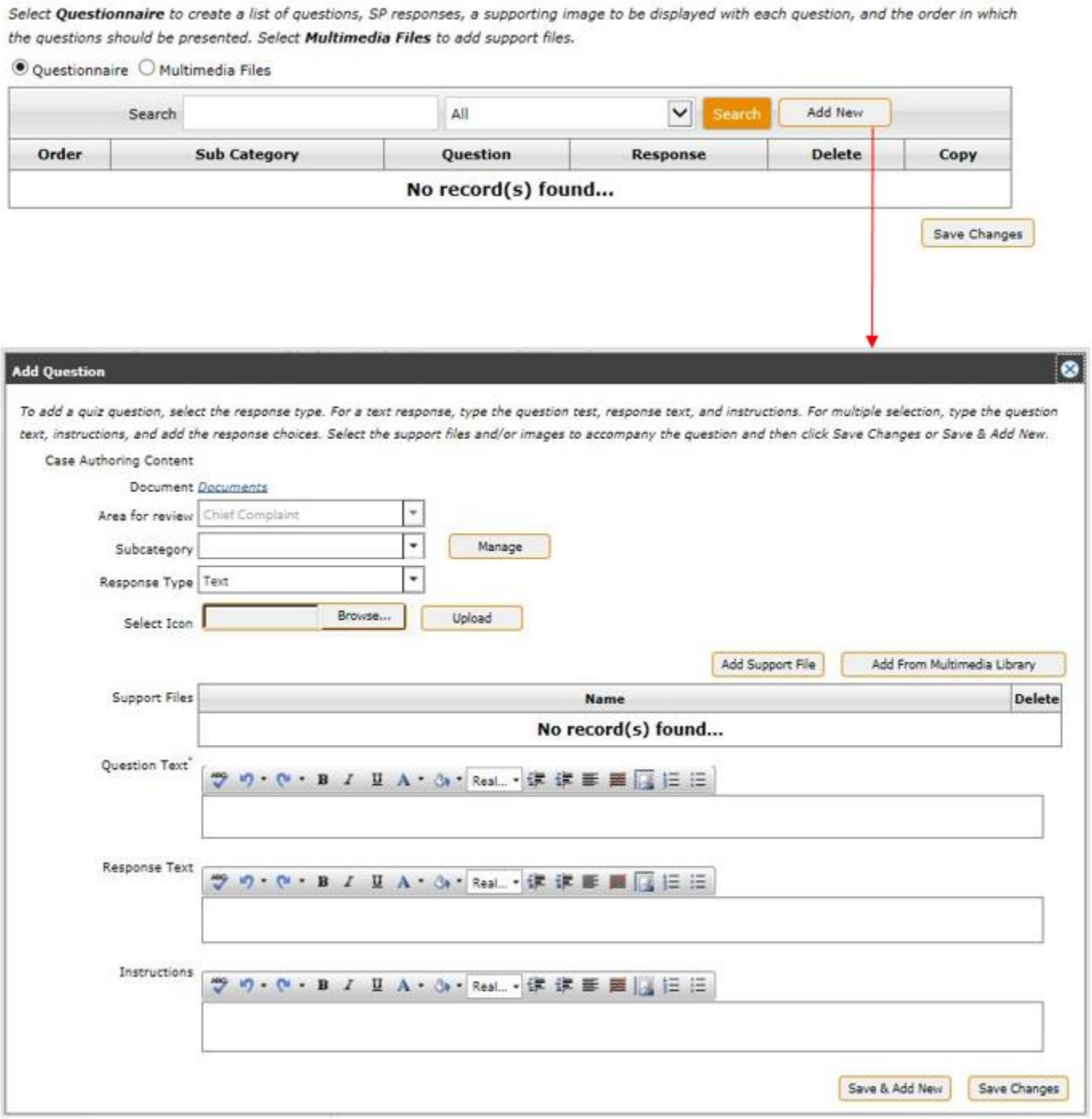
Enter the following in this section:

Field	Description
Instructions	Enter instructions to quiz the SP to determine if he/she is able to

	properly portray the case.

Questionnaire

A checklist can be attached as part of the quiz as follows:

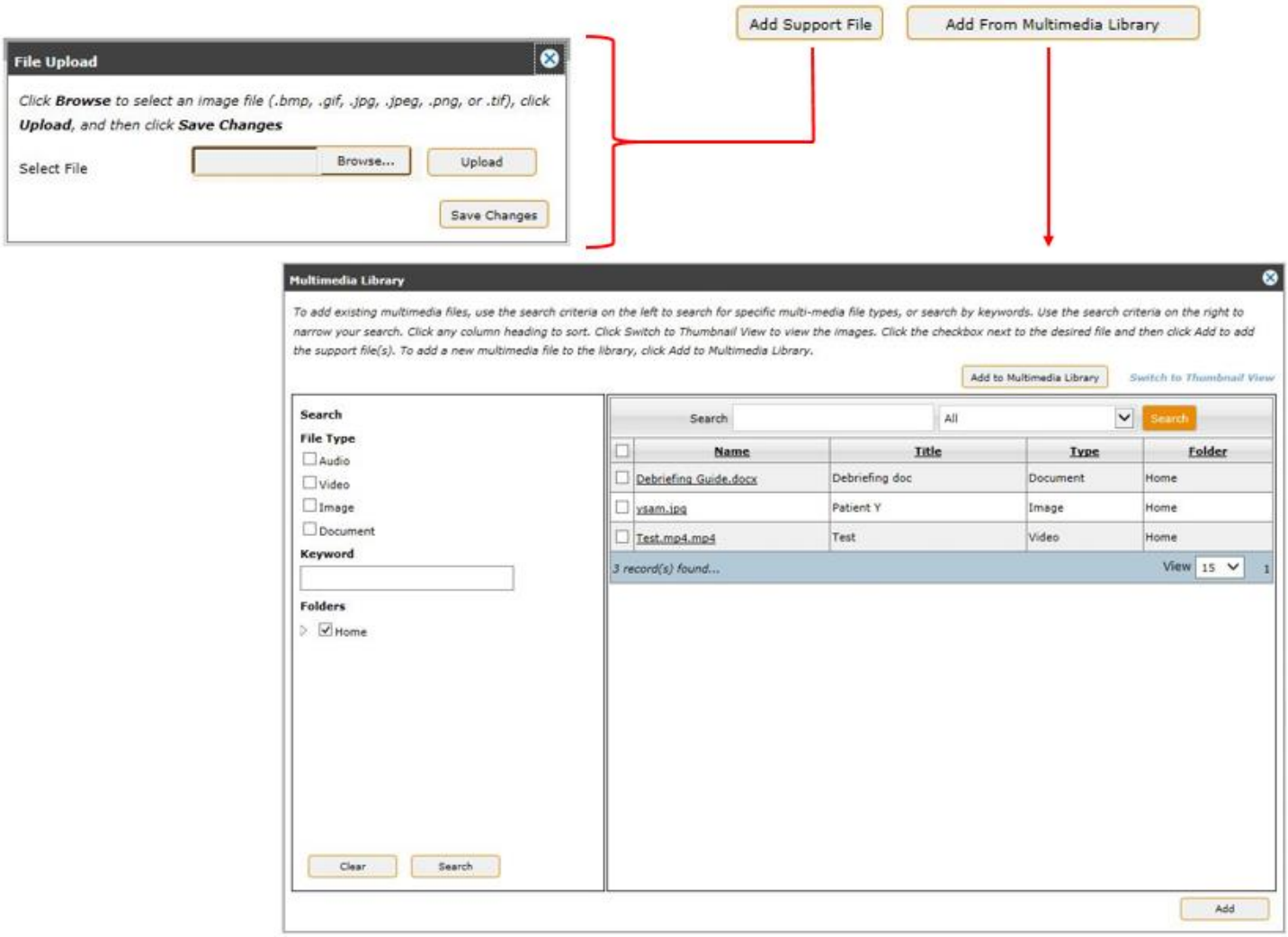


Note: Image altered for presentation purposes.

Enter the following information:

Field	Description
Area for Review	The current area for review (Chief Complaint, Social History, etc.) will be displayed.
Sub Category	Create a sub category if desired, such as HPI (History of Present Illness) or ROS (Review of Systems) under medical categories such as Chief Complaint or Medical History.
Response Type	This defaults to Text when adding a question to the training case.
Select Icon	Upload an icon from the multimedia library for use with a question and answer for easier recall by the SP.
Support Files	Add multimedia support files to illustrate points for the standardized patient.
Question Text	This is the anticipated question posed by the learner.
Response Text	This is the information the SP will learn and use when responding to the student.
Instructions	Enter a summary of the overall complaint (e.g., breathing problems)

From within the questionnaire selection, a multimedia file can be attached as follows:



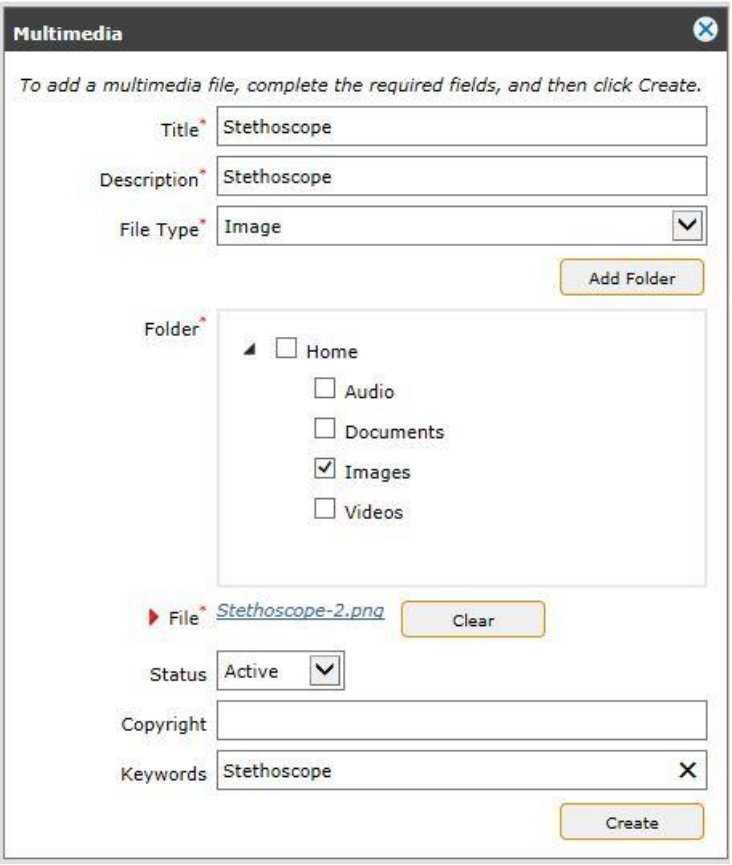
Enter the following information:

Field	Description
Add Support File	Select a multimedia file (e.g., .jpg, .wmv, .avi) from your PC. Browse for the file, press **Upload**, and **Save Changes** when finished.
Add From Multimedia Library	Select a multimedia file from your multimedia library. Select the Search File Type (Audio, Video, Image, Document) by clicking the applicable checkboxes. The default search location is the multimedia Home directory; click the **Audio**, **Video**, **Image**, and **Document** subfolder checkboxes to search those locations. You can also enter text to narrow your search parameters within the results grid.

The multimedia grid appears with the folder view in the left column. If a multimedia item's file name has already been selected, it appears by default in the grid. Multimedia grid items can be sorted by name, type, title, and folder. You can also enter a search term in the text field to locate grid items.

For a thumbnail view of the file, click the **Switch to Thumbnail View** hyperlink.

You can also add a multimedia file to the multimedia library. Click the **Add to Multimedia Library** button to call up the following dialog (an example appears below):



Enter the following:

Field	Description
Title*	Enter the title of the multimedia file.
Description*	Enter a description of the multimedia file.
File Type*	Select a file type (Audio, Video, Image, Document).
Folder*	Click the arrow next to the Home folder to open up subfolder locations for the multimedia file. To create a new subfolder, click the **Add Folder** button.
File*	Click Browse to locate the file and **Upload** to place the file in your folder location. Press **Clear** to remove the file.

Status	Select a status of **Active** or **Retired**.
Copyright	Enter copyright details for the multimedia file.
Keywords	Enter any keywords for the file.
***-required fields	

After entering your information including the folder location, press **Create** to add the item to the multimedia library; this removes the item from the Home directory shown on the grid. Select the file and press **Add** at the Multimedia Library dialog to add the file to your question. Select **Save & New** to save the question and enter another or press **Save Changes** when you have finished.

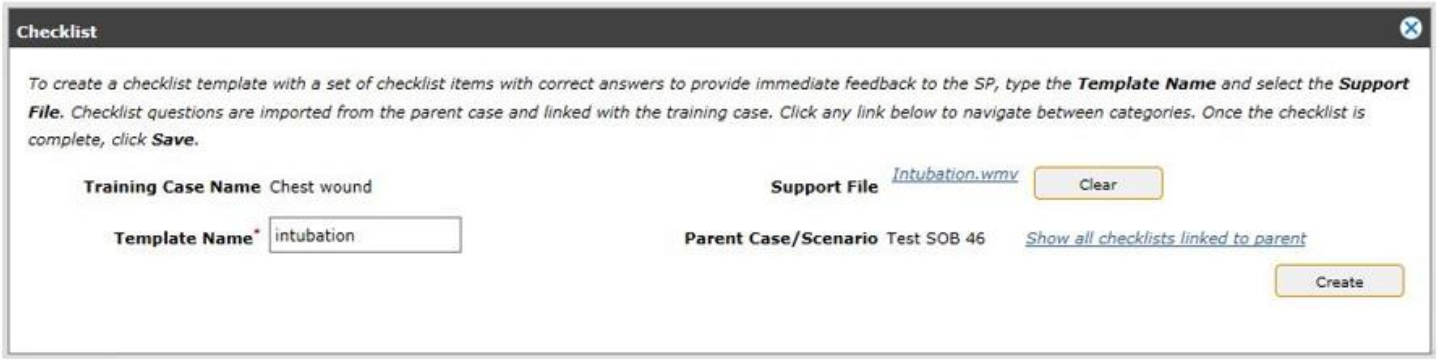
Press **Save Changes** to retain the information at this section.

Case Trainer Checklist

The Checklist section of the Case Trainer page appears as follows:

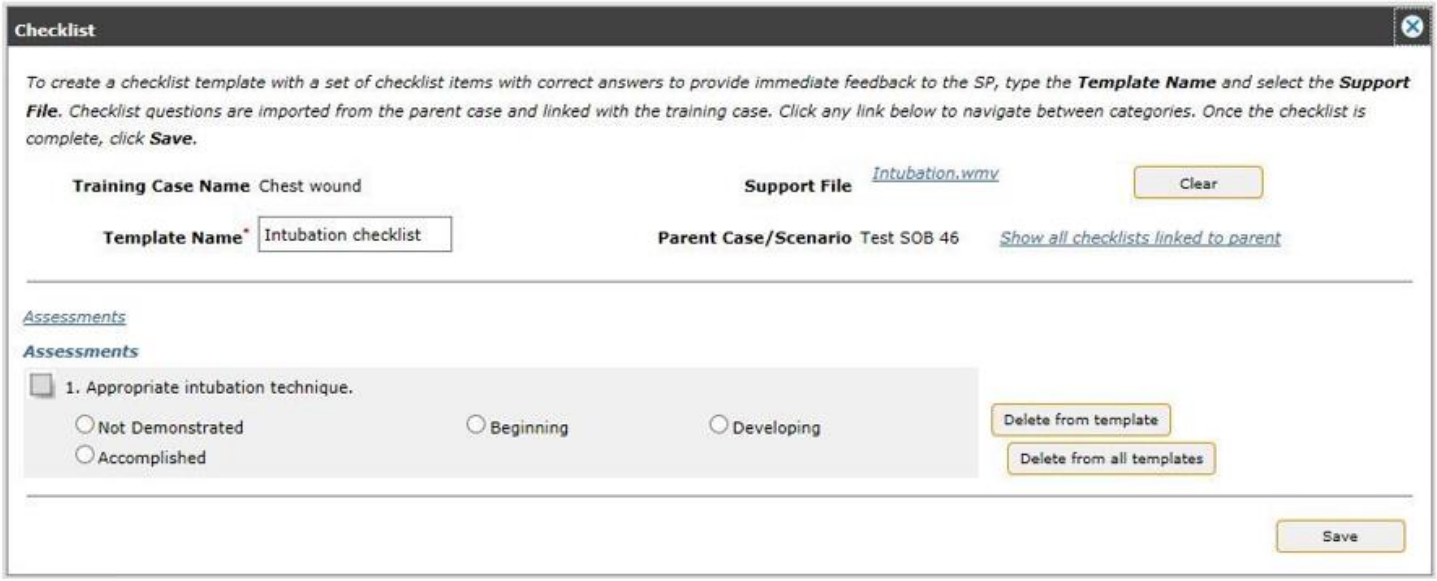
Note: To enable the checklist functionality, a Parent Case must be included with checklist items from a Performance Assessment.

Click the **Add New** button to call up the following dialog:

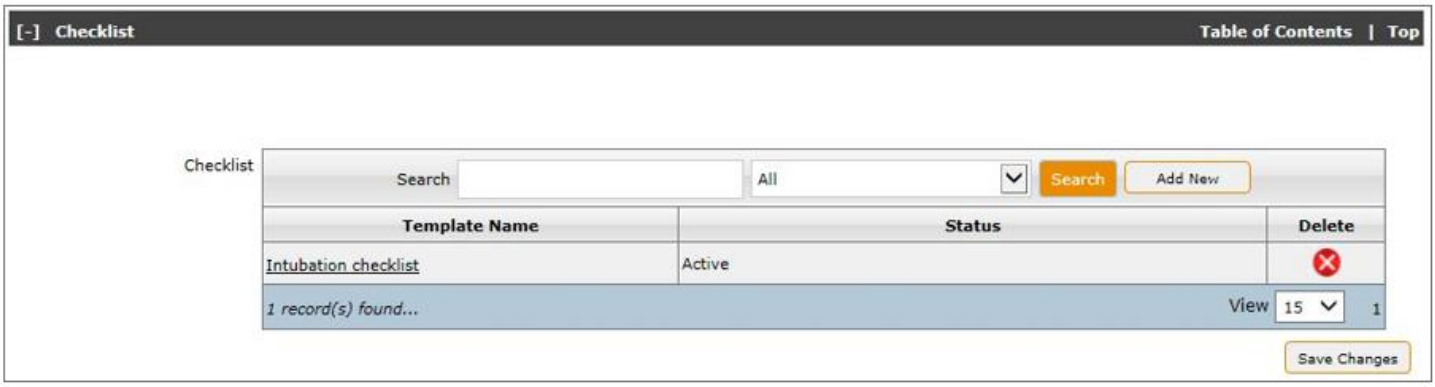


Assign a template name and add any support files to accompany the checklist. Click the Show all checklists linked to parent hyperlink to view all checklists associated with the Parent Case.

Press **Create**, and the following sample checklist appears (the question categories and answer types are the same as those chosen for the Performance Assessment in the Parent Case):



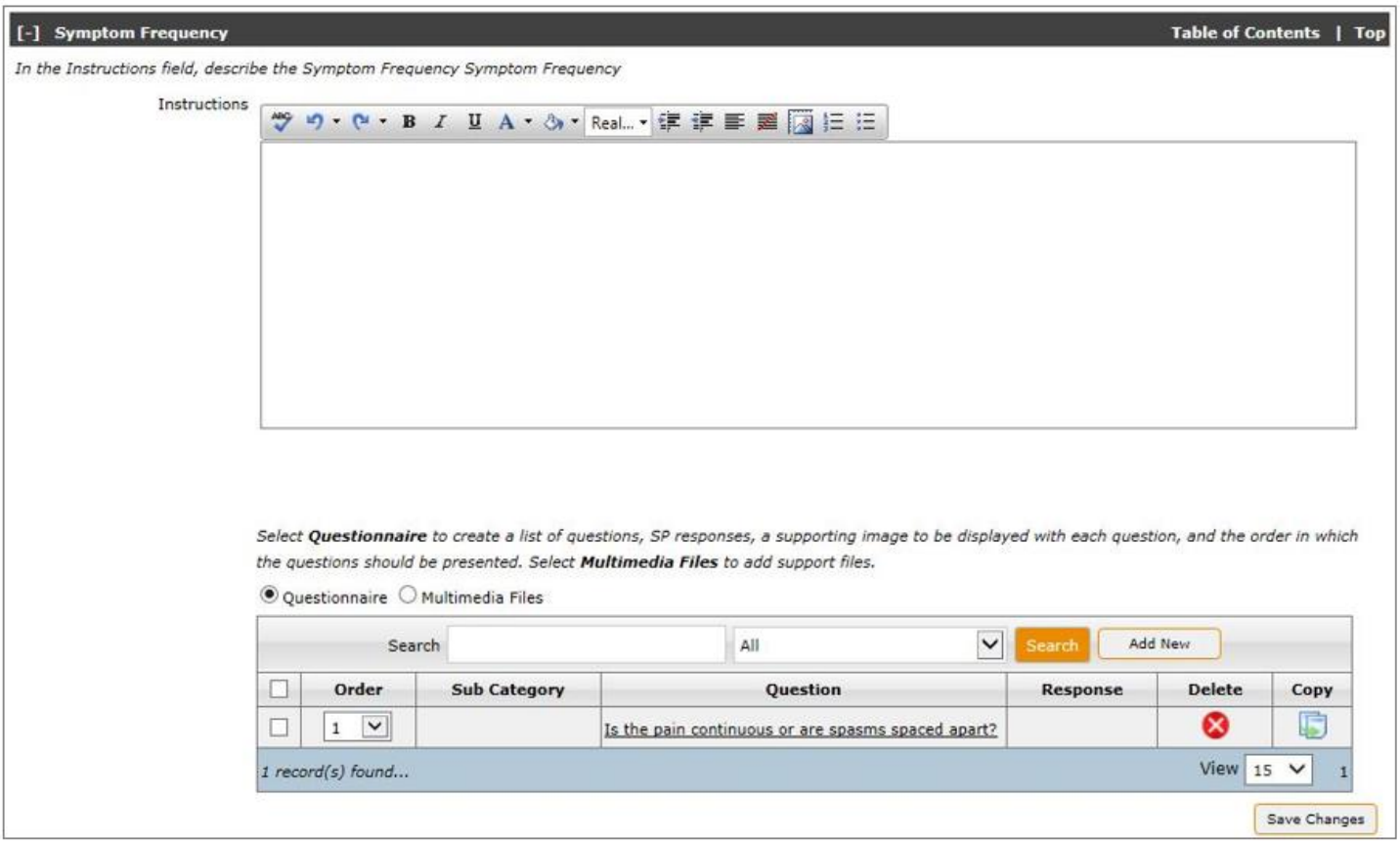
Press **Save**, and the checklist appears on the Case Trainer page as shown:



Press **Save Changes** to retain the checklist within Case Trainer.

Symptom Frequency

Note: If a Case Authoring document is associated with this training case, any documents associated with it appear at this section.

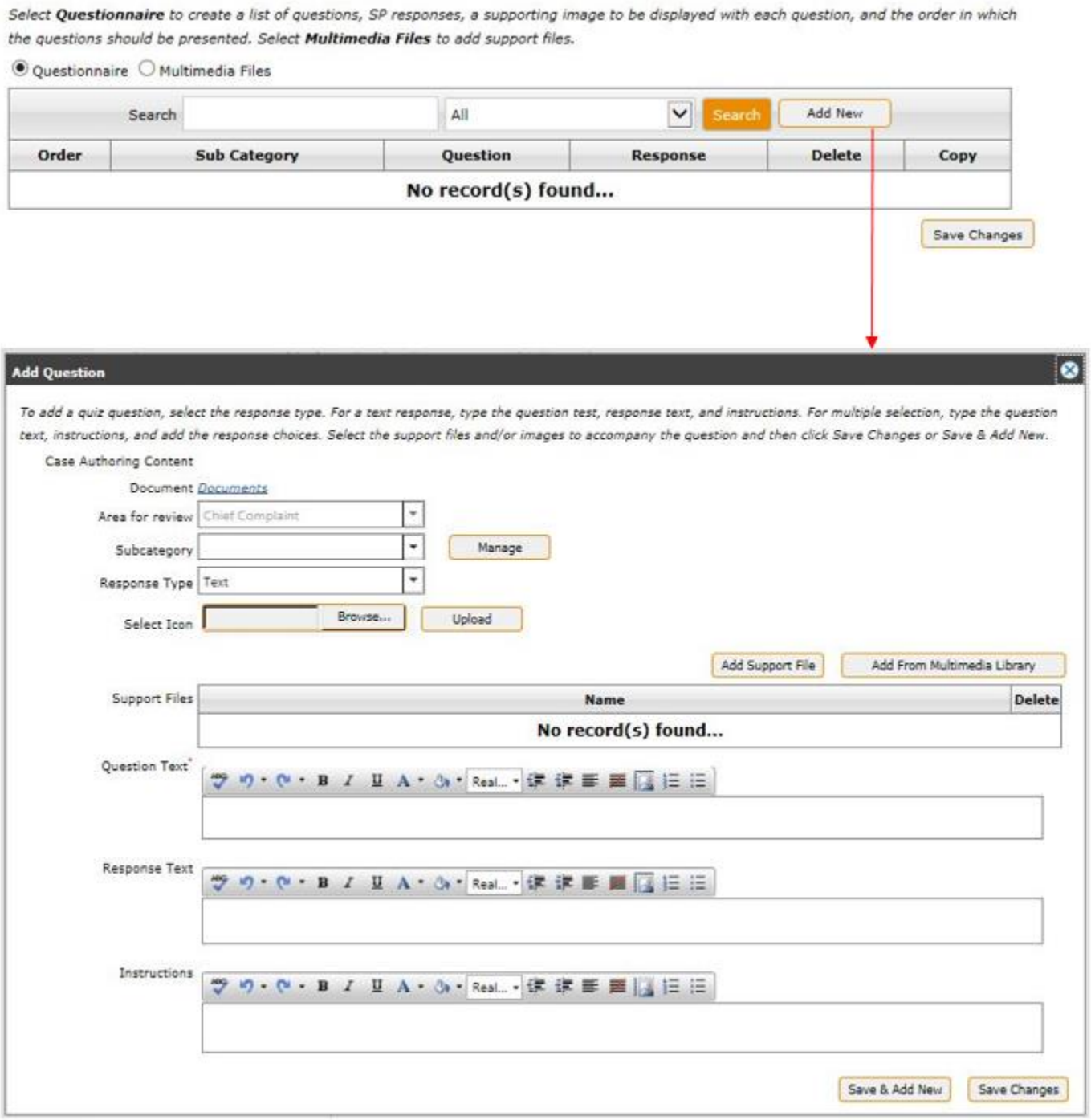


Enter the following in this section:

Field	Description
Instructions	Enter information related to symptom frequency as part of the patient portrayal.
Questionnaire/ Multimedia Files	Select a questionnaire or multimedia file to be included in the patient portrayal of symptom frequency.

Questionnaire

A questionnaire can be attached to SP training directions as follows:

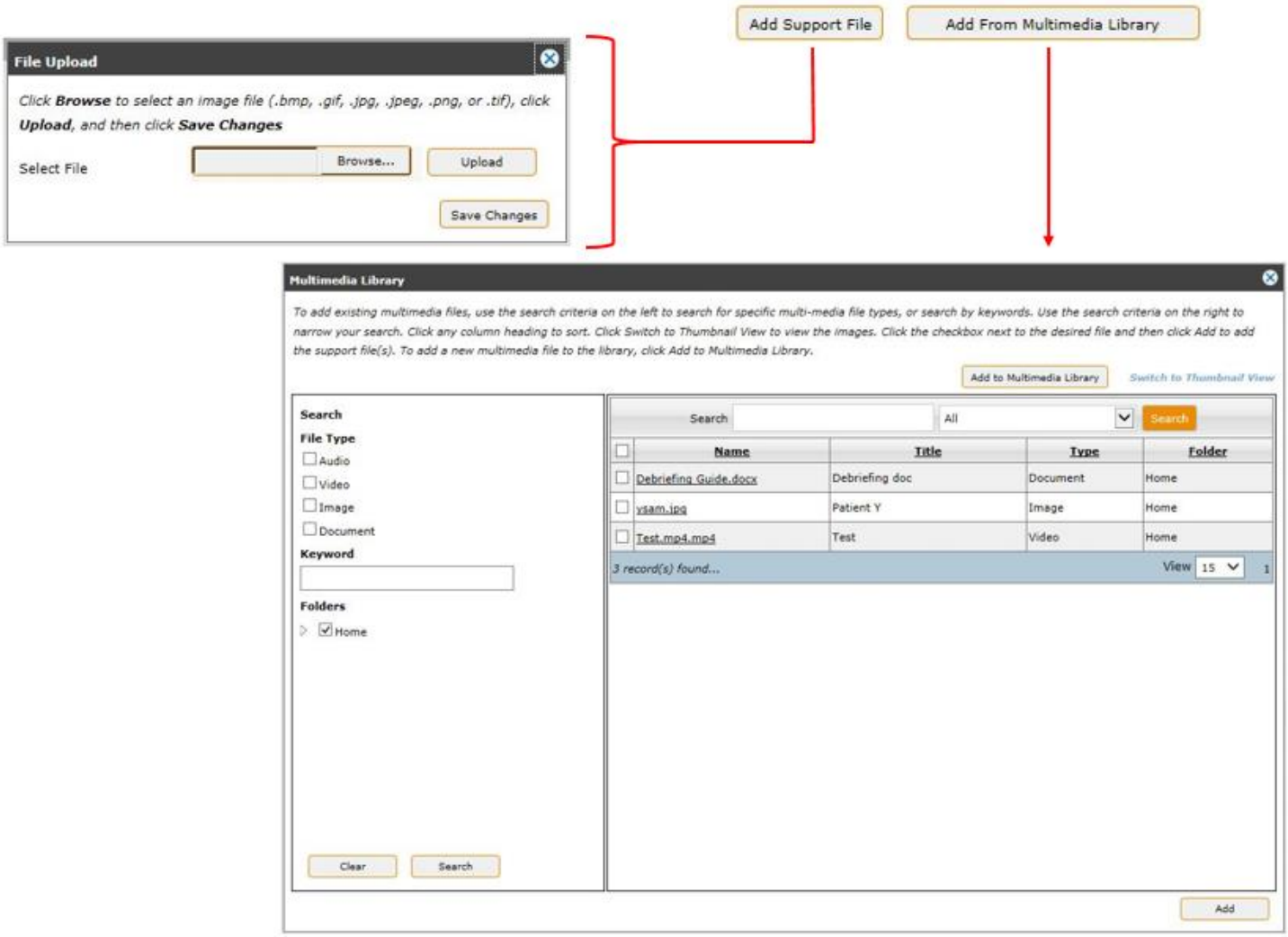


Note: Image altered for presentation purposes.

Enter the following information:

Field	Description
Area for Review	The current area for review (Chief Complaint, Social History, etc.) will be displayed.
Sub Category	Create a sub category if desired, such as HPI (History of Present Illness) or ROS (Review of Systems) under medical categories such as Chief Complaint or Medical History.
Response Type	This defaults to Text when adding a question to the training case.
Select Icon	Upload an icon from the multimedia library for use with a question and answer for easier recall by the SP.
Support Files	Add multimedia support files to illustrate points for the standardized patient.
Question Text	This is the anticipated question posed by the learner.
Response Text	This is the information the SP will learn and use when responding to the student.
Instructions	Enter a summary of the overall complaint (e.g., breathing problems)

From within the questionnaire selection, a multimedia file can be attached as follows:



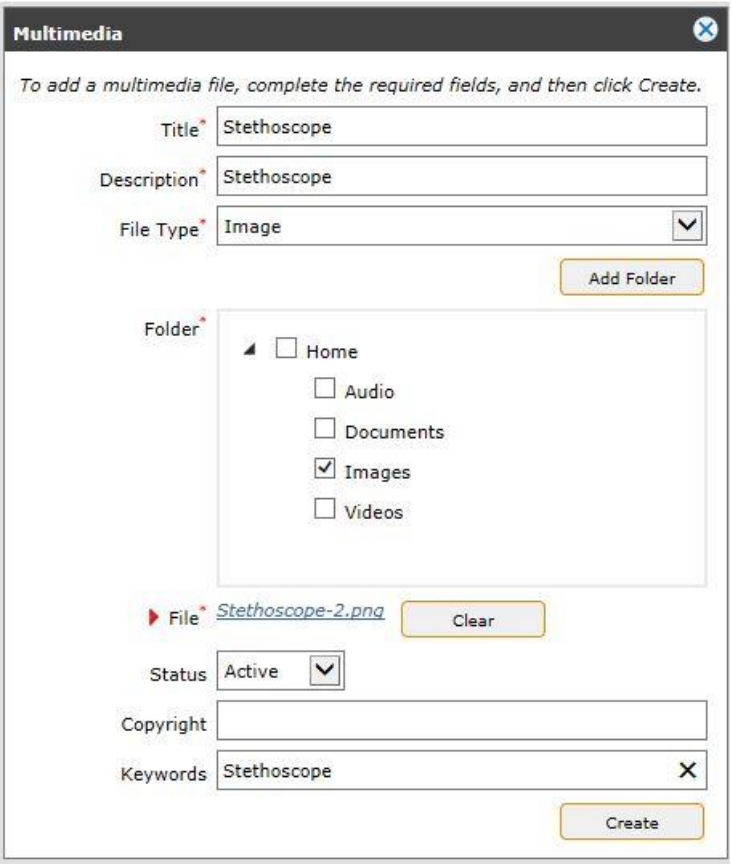
Enter the following information:

Field	Description
Add Support File	Select a multimedia file (e.g., .jpg, .wmv, .avi) from your PC. Browse for the file, press **Upload**, and **Save Changes** when finished.
Add From Multimedia Library	Select a multimedia file from your multimedia library. Select the Search File Type (Audio, Video, Image, Document) by clicking the applicable checkboxes. The default search location is the multimedia Home directory; click the **Audio**, **Video**, **Image**, and **Document** subfolder checkboxes to search those locations. You can also enter text to narrow your search parameters within the results grid.

The multimedia grid appears with the folder view in the left column. If a multimedia item's file name has already been selected, it appears by default in the grid. Multimedia grid items can be sorted by name, type, title, and folder. You can also enter a search term in the text field to locate grid items.

For a thumbnail view of the file, click the **Switch to Thumbnail View** hyperlink.

You can also add a multimedia file to the multimedia library. Click the **Add to Multimedia Library** button to call up the following dialog (an example appears below):



Enter the following:

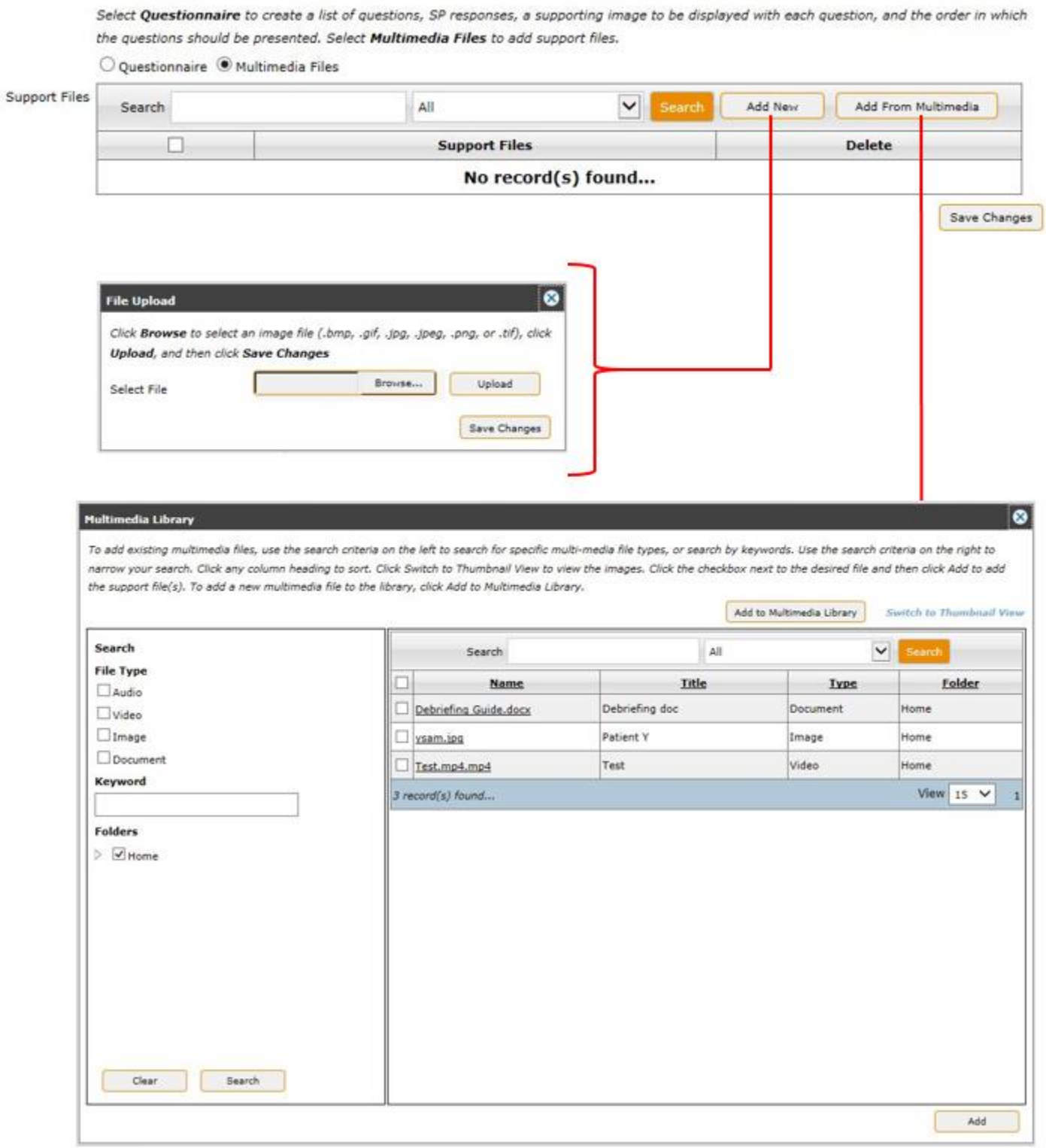
Field	Description
Title*	Enter the title of the multimedia file.
Description*	Enter a description of the multimedia file.
File Type*	Select a file type (Audio, Video, Image, Document).
Folder*	Click the arrow next to the Home folder to open up subfolder locations for the multimedia file. To create a new subfolder, click the **Add Folder** button.
File*	Click **Browse** to locate the file and **Upload** to place the file in your folder location. Press **Clear** to remove the file.

Status	Select a status of **Active** or **Retired**.
Copyright	Enter copyright details for the multimedia file.
Keywords	Enter any keywords for the file.
*-required field	

After entering your information including the folder location, press Create to add the item to the multimedia library; this removes the item from the Home directory shown on the grid. Select the file and press **Add** at the Multimedia Library dialog to add the file to your question. Select **Save & New** to save the question and enter another or press **Save Changes** when you have finished.

Multimedia

A multimedia file can be attached to the chief complaint as follows:



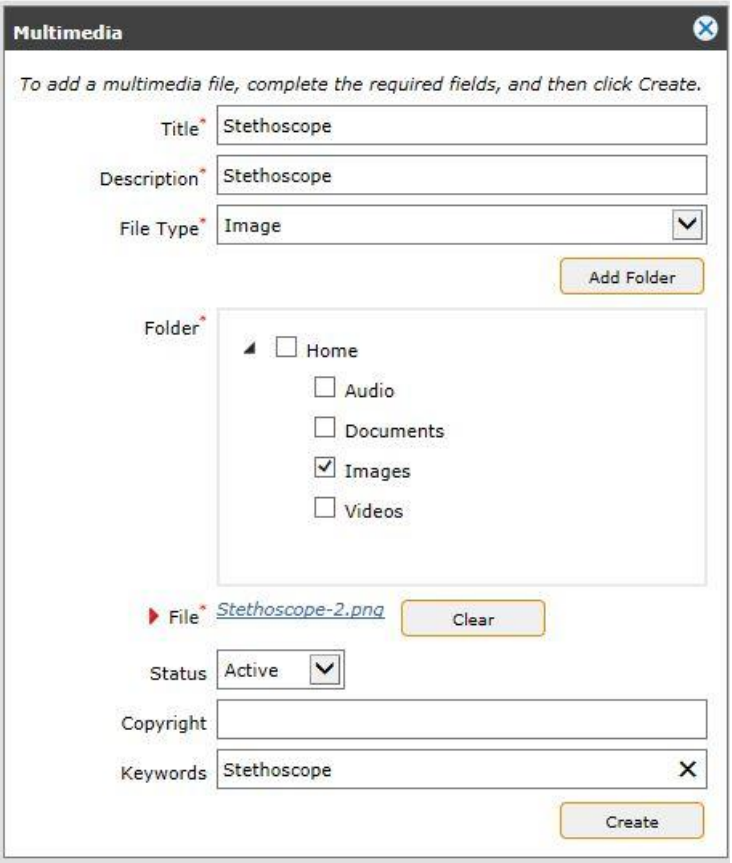
The following selections are available:

Field	Description
Add New	Select a multimedia file (e.g., .jpg, .wmv, .avi) from your PC. Browse for the file, press **Upload**, and **Save Changes** when finished (this populates the Support Files grid).
Add From Multimedia	Select a multimedia file from your multimedia library. Select the Search File Type (Audio, Video, Image, Document) by clicking the applicable checkboxes. The default search location is the multimedia Home directory; click the Audio, Video, Image, and Document subfolder checkboxes to search those locations. You can also enter text to narrow your search parameters within the results grid.

The multimedia grid appears with the folder view in the left column. If a multimedia item's file name has already been selected, it appears by default in the grid. Multimedia grid items can be sorted by name, type, title, and folder. You can also enter a search term in the text field to locate grid items.

For a thumbnail view of the file, click the **Switch to Thumbnail View** hyperlink.

You can also add a multimedia file to the multimedia library. Click the **Add to Multimedia Library** button to call up the following dialog (an example appears below):



Enter the following:

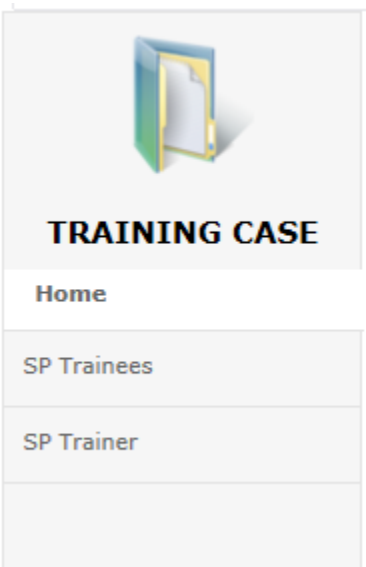
Field	Description
Title*	Enter the title of the multimedia file.
Description*	Enter a description of the multimedia file.
File Type*	Select a file type (Audio, Video, Image, Document).
Folder*	Click the arrow next to the Home folder to open up subfolder locations for the multimedia file. To create a new subfolder, click the **Add Folder** button.
File*	Click **Browse** to locate the file and **Upload** to place the file in your folder location. Press **Clear** to remove the file.
Status	Select a status of **Active** or **Retired**.
Copyright	Enter copyright details for the multimedia file.
Keywords	Enter any keywords for the file.
*-required field	

After entering your information including the folder location, press Create to add the item to the multimedia library; this removes the item from the Home directory shown on the grid. Select the file and press **Add** at the Multimedia Library dialog to add the file to your question.

Press **Save Changes** to retain the information at this section.

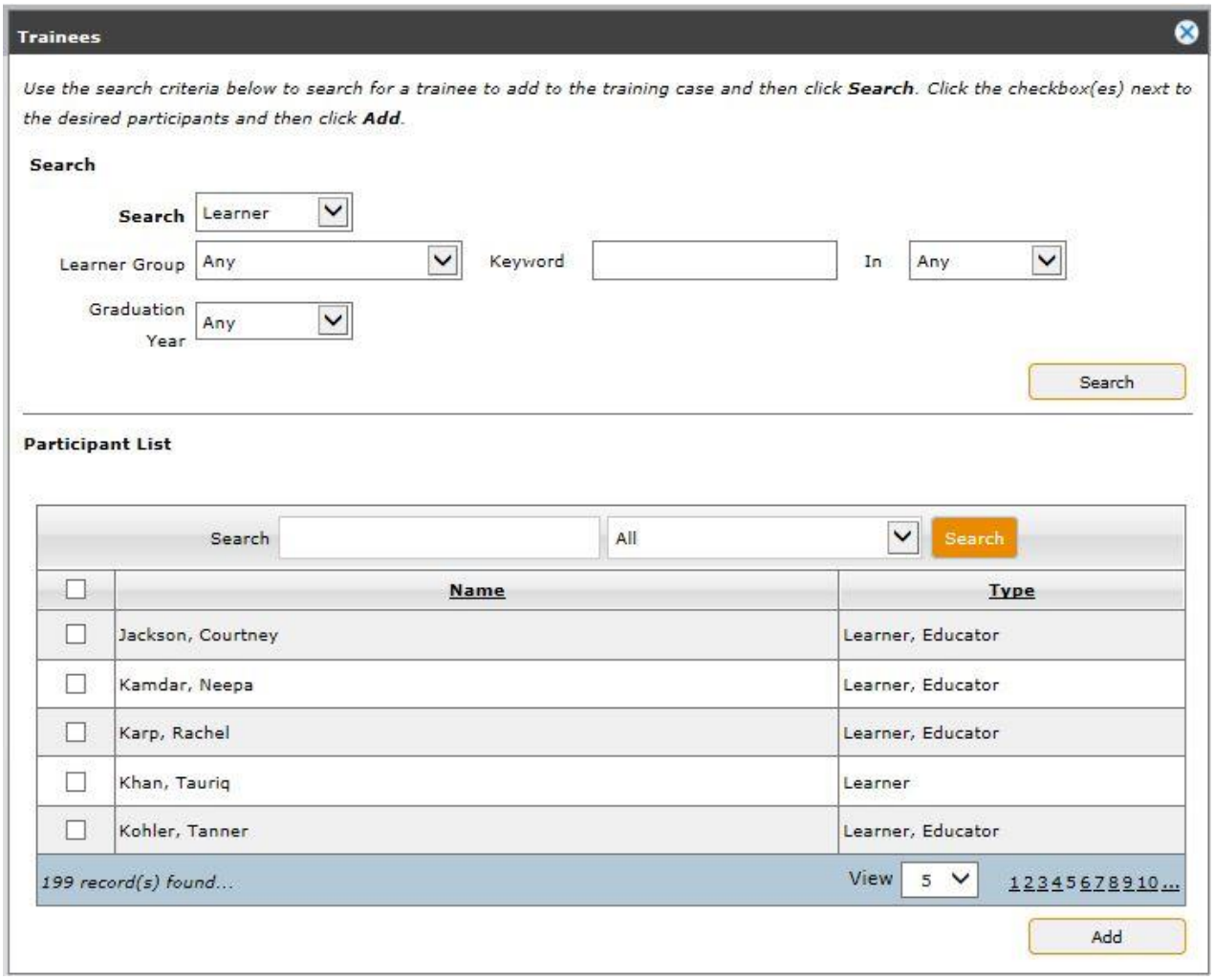
Training Case Tool Belt

The Training Case tool belt appears as follows:



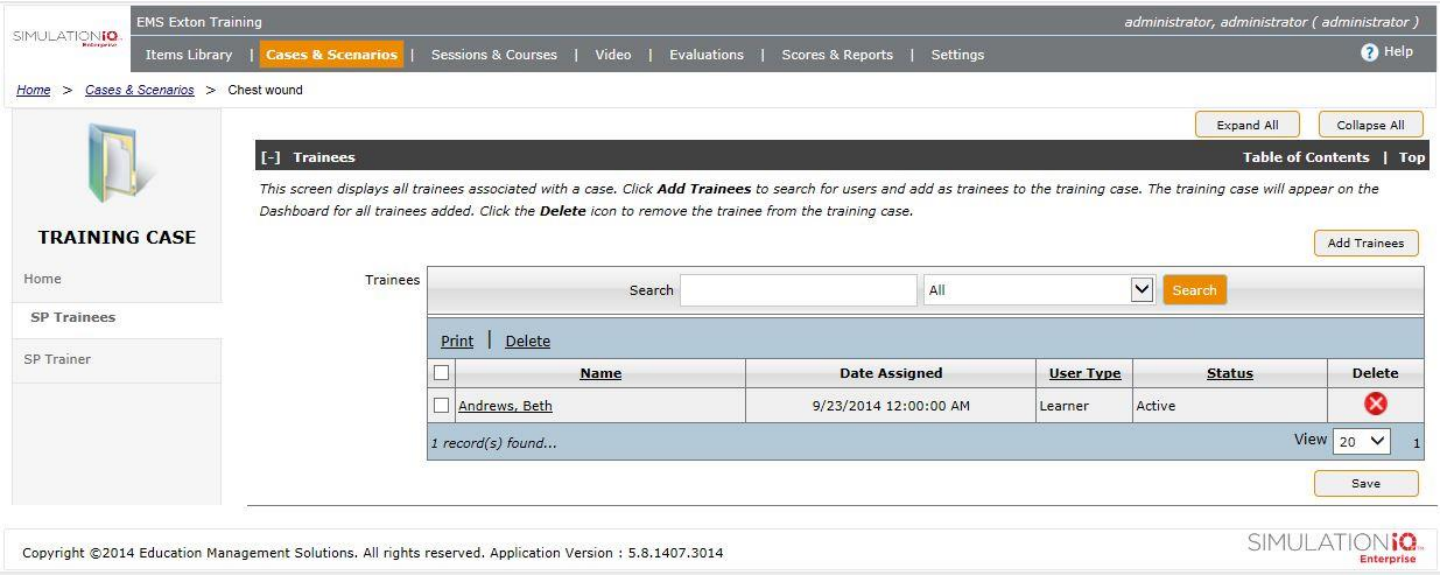
- **Home** – This is the default view of the Case Training activity page.

- **SP Trainees** – Click the Add Trainees button to add any user as a case trainee. A sample dialog appears below:



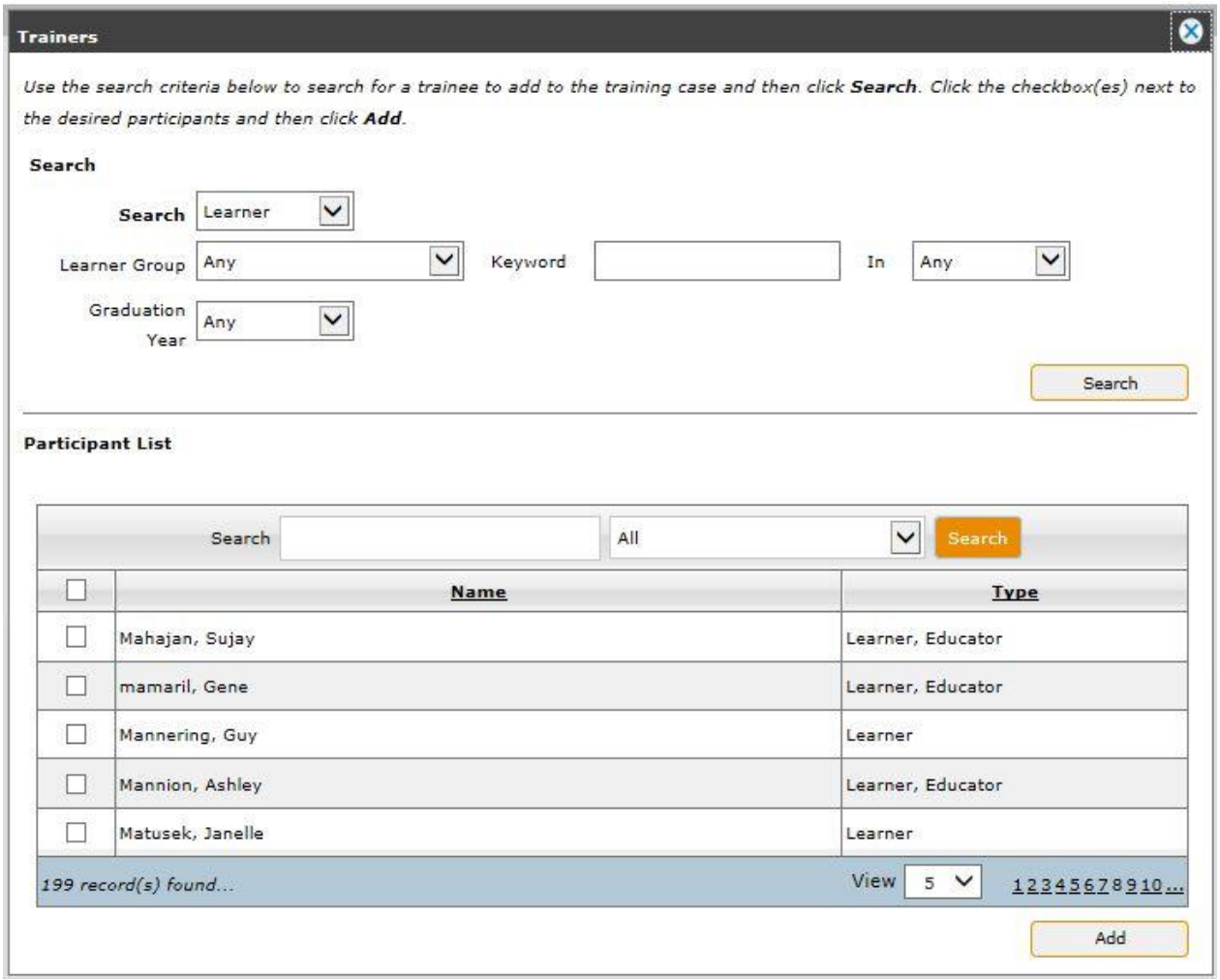
You can also search within the grid by Learner, Educator, SP, or Session. You can also search within the grid by Learner Group, Graduation Year, or any keyword; you can also specify First, Last, or Middle Name as a Search parameter.

Click the checkbox for the desired user and click **Add**. The following grid appears:



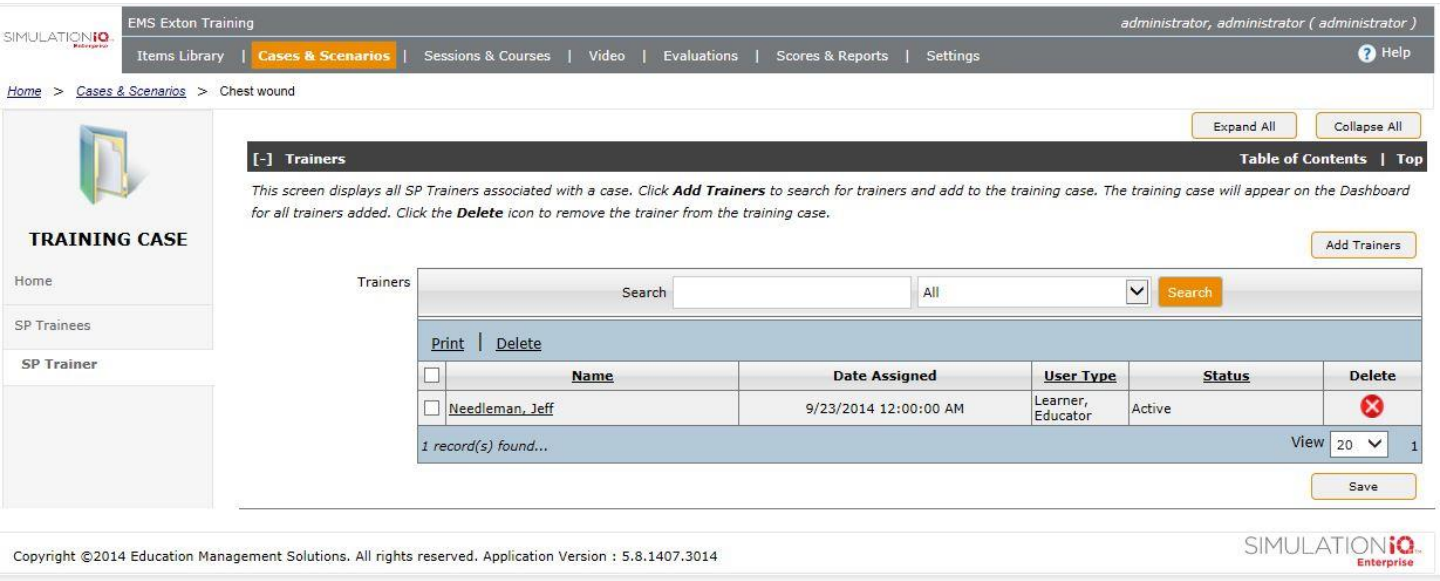
From this grid, you can sort by Name, User Type, and Status. Enter a keyword at the Search field to search within the grid, or click the checkbox and press Delete to remove your entry.

- **SP Trainers** – Click the Add Trainers button to add any user as a case trainer. A sample dialog appears below:



You can also search within the grid by Learner, Educator, SP, or Session. You can also search within the grid by Learner Group, Graduation Year, or any keyword; you can also specify First, Last, or Middle Name as a Search parameter.

Click the checkbox for the desired user and click **Add**. The following grid appears:

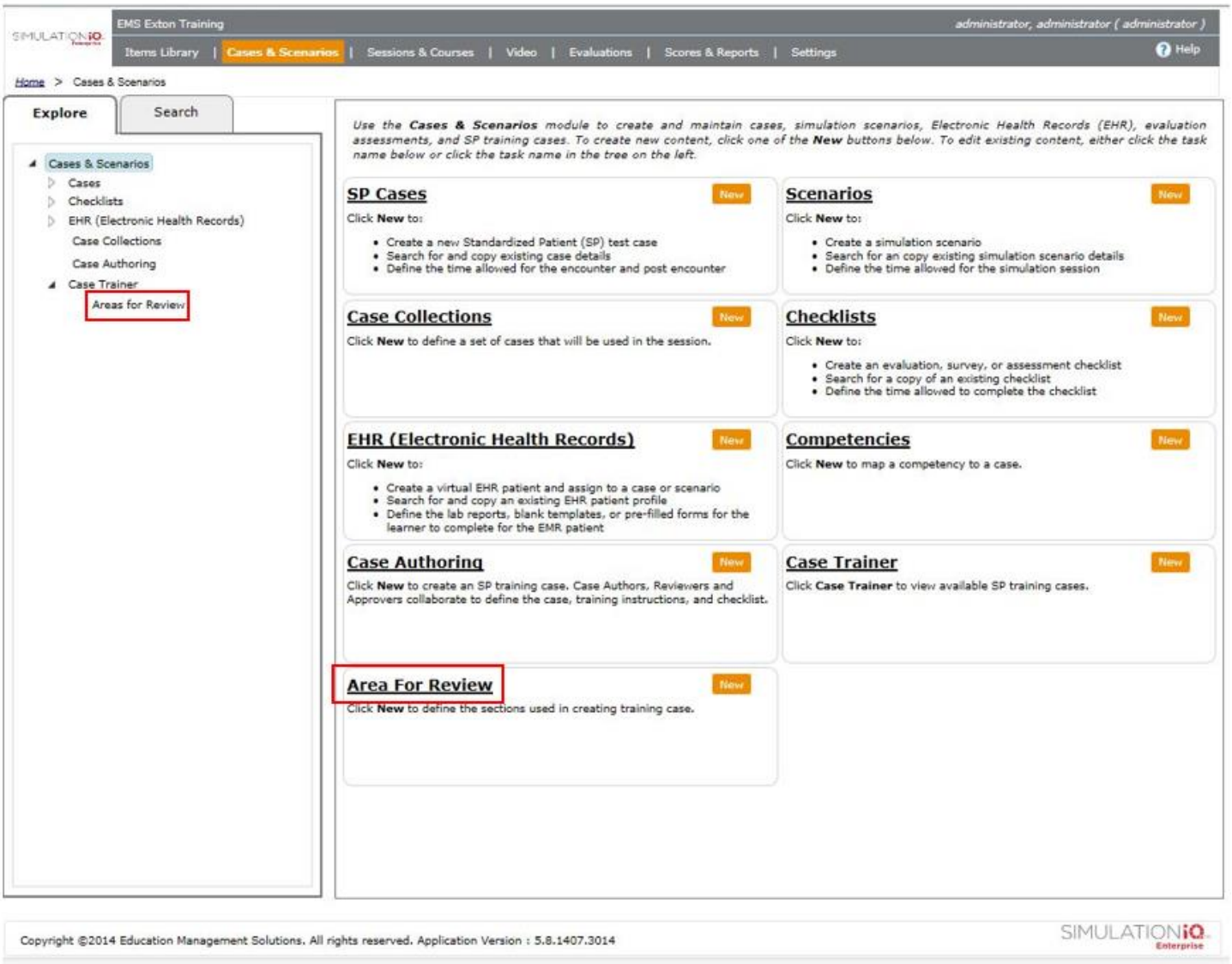


From this grid, you can sort by **Name**, **User Type**, and **Status**. Enter a keyword at the **Search** field to search within the grid, or click the checkbox and press **Delete** to remove your entry.

Area for Review

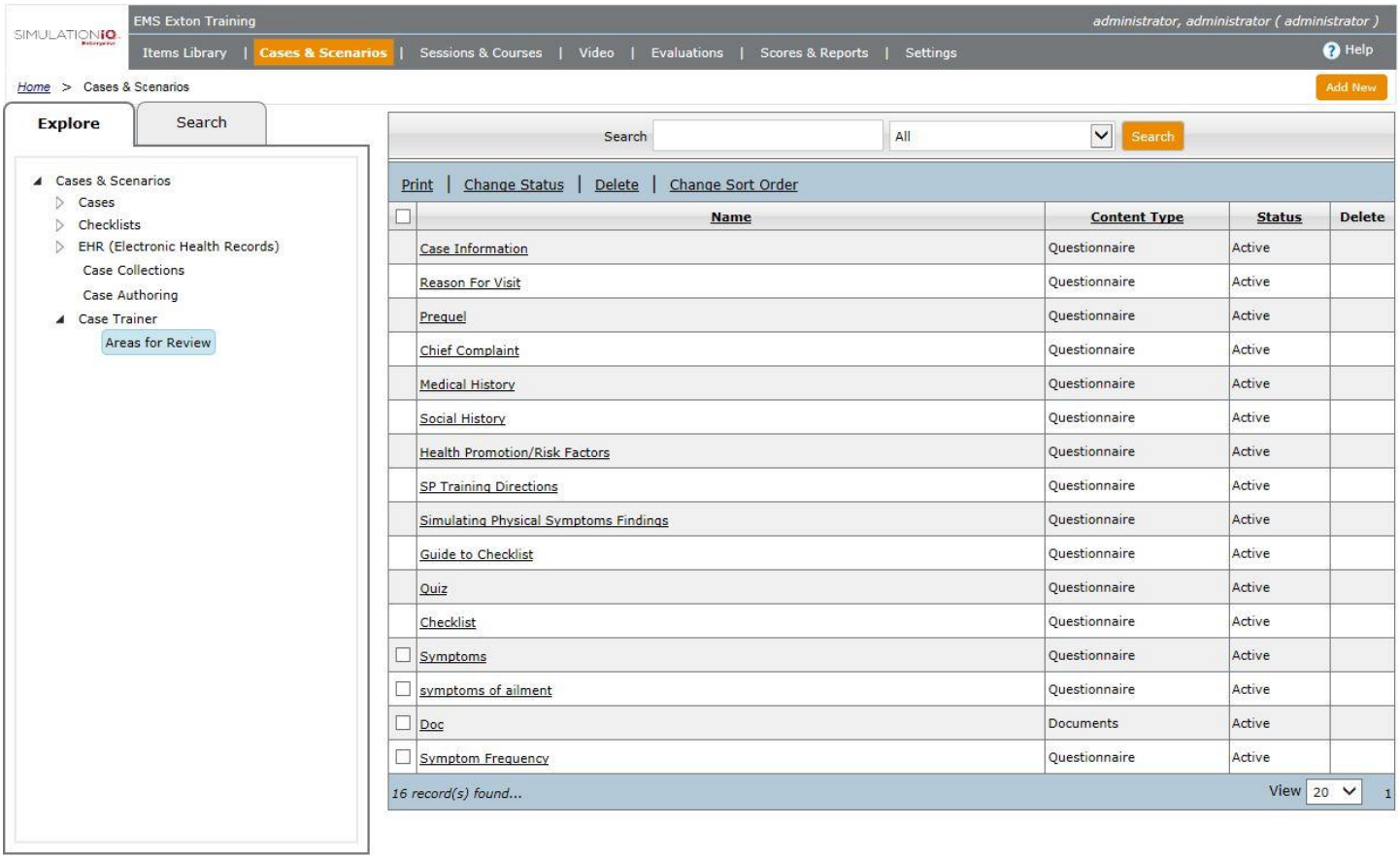
Area for Review items are titles of subject matter to be reviewed and used for the training of the case. It is where the script and detail about how to answer history, symptom or social history questions may reside that are not necessarily on the checklist (specified in Case Trainer). This section may also provide video clips as well as a guide to the checklist with, for example, photographs of stethoscope placement, along with a content quiz and a video clip used to complete the checklist.

The Area for Review section appears as follows from the Cases and Scenarios landing page:

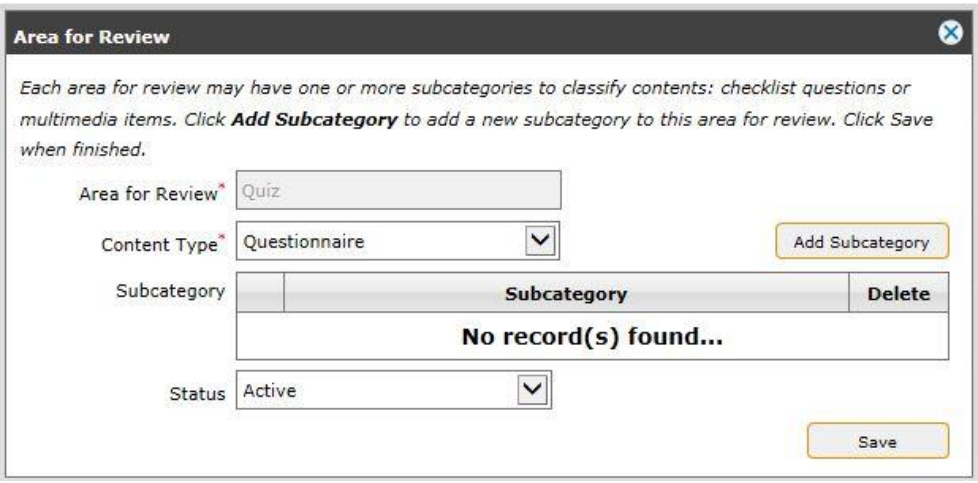


Searching for an Area for Review

To search for existing Areas for Review, click the **Area for Review** link on the Cases and Scenarios landing page (or click the **Area for Review** selection in the Explore column) to view existing selections. Default Areas for Review exist within SIMULATIONiQ Enterprise that can be added to a training case, though you can also create your own Areas for Review as needed.



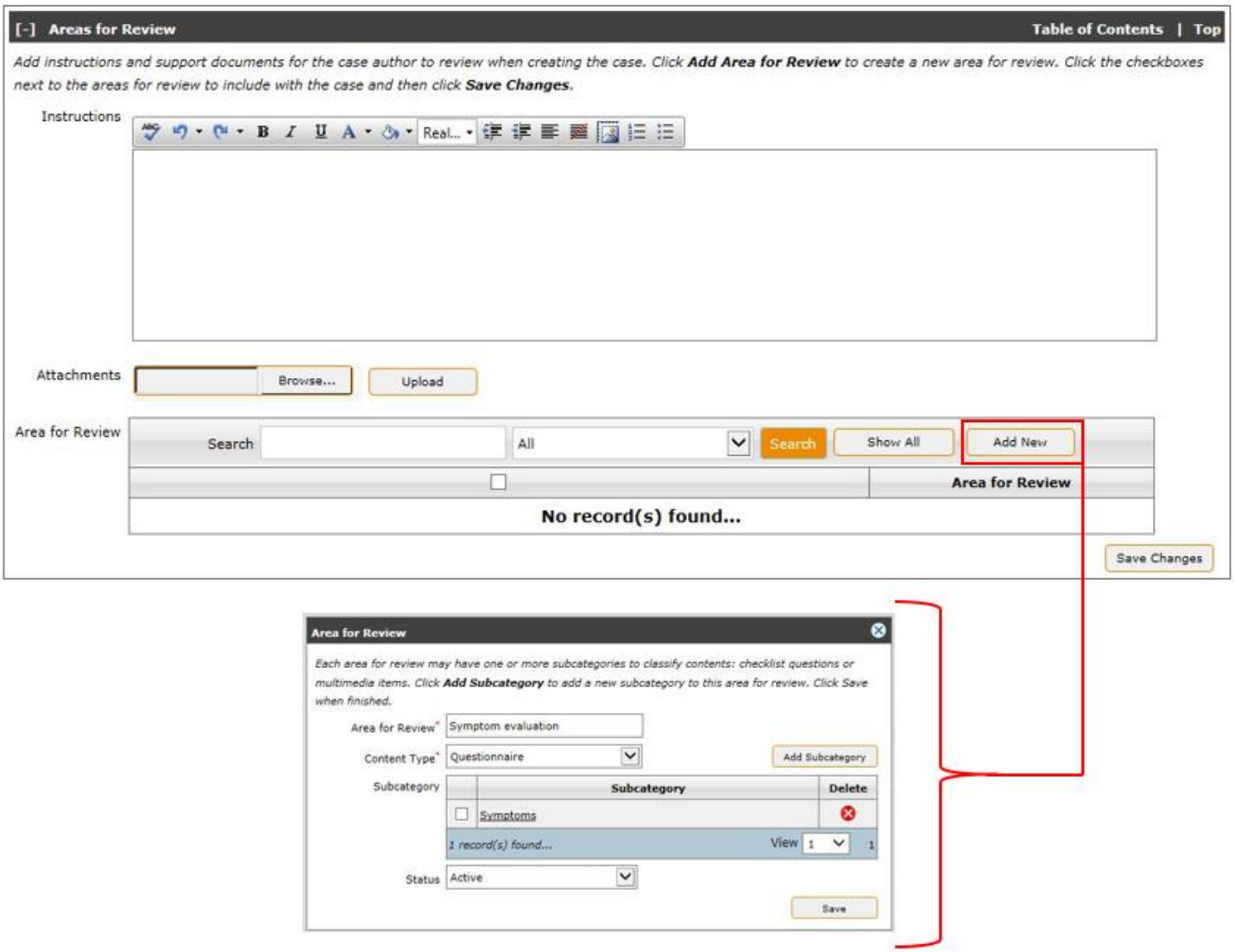
Click a link under the **Name** column to open an Area for Review, as follows (more information appears in the Creating an Area for Review topic; the default Area for Review name appears at the field).



Press **Save** after updating your Area for Review details.

Creating an Area for Review

You can also click the **New** button at the Area for Review selection on the Case Authoring landing page to call up the following dialog:



Enter the following information:

- **Instructions** – Add instructions and support documents for the case author to review when creating the training case.
- **Area for Review** – Select an existing area to be covered in the case authoring document or click **Add New** to add a new area for review, as shown.
- **Content Type** – Select either **Questionnaire** or **Documents**.

Click the checkbox next to any existing subcategories or press Add Subcategory to call up the following:

Enter the Subcategory name and press **Save** to populate the Sub Category grid. After entering the subcategory name, you can also change the Area for Review status to **Retired** (**Active** is the default). When you have finished subcategory details, press **Create**.

Case Authoring/Case Trainer Process Flow

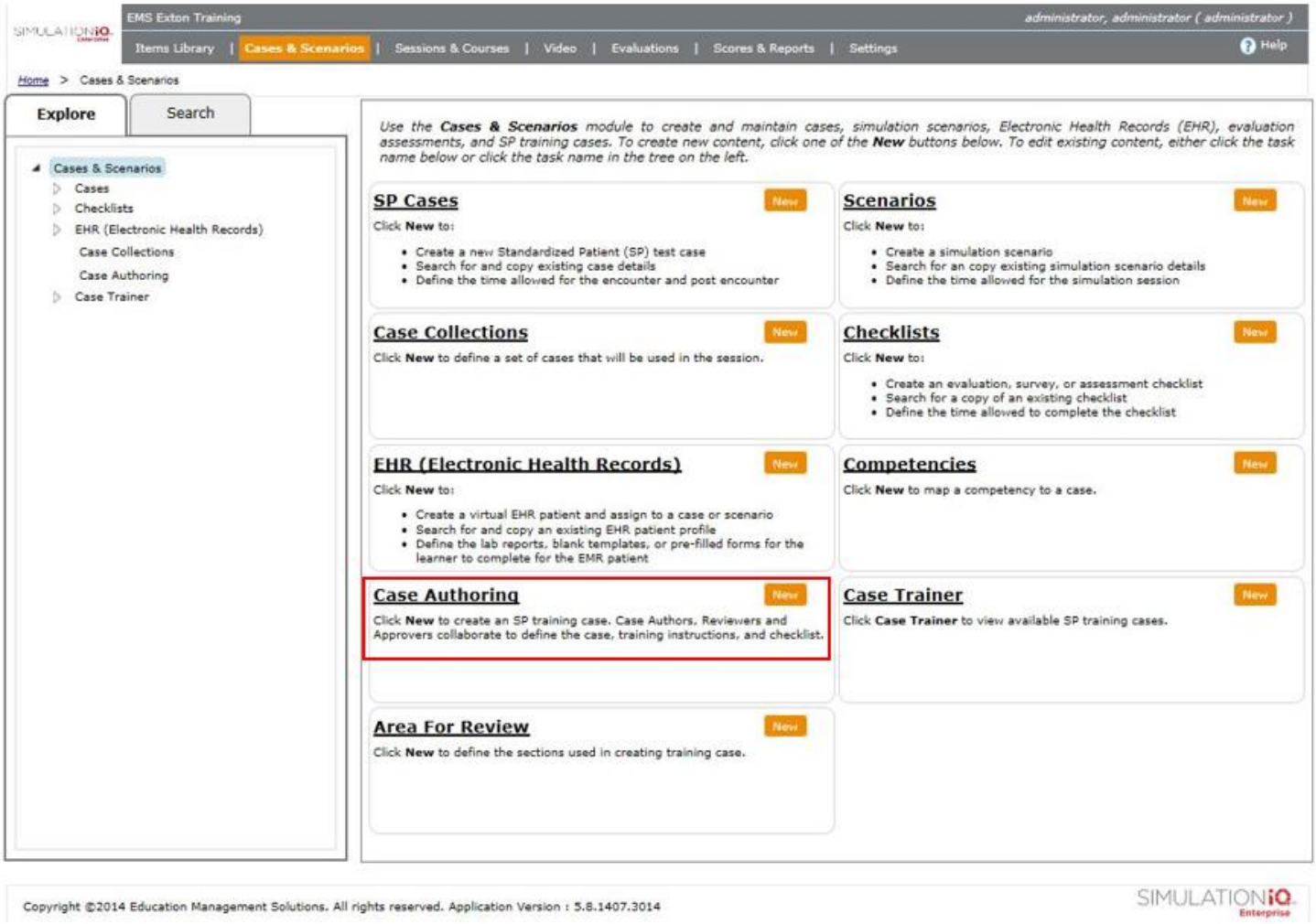
Note: The purpose of this section is to show a sample high-level process flow between the Case Authoring and Case Trainer components. More detailed functionality is described in the Case Authoring and Case Trainer sections (this procedure also uses fictional names for workflow purposes; all data is for demonstration purposes only).

Create Case Authoring Document

Select **Case Authoring** from the Cases and Scenarios task group.

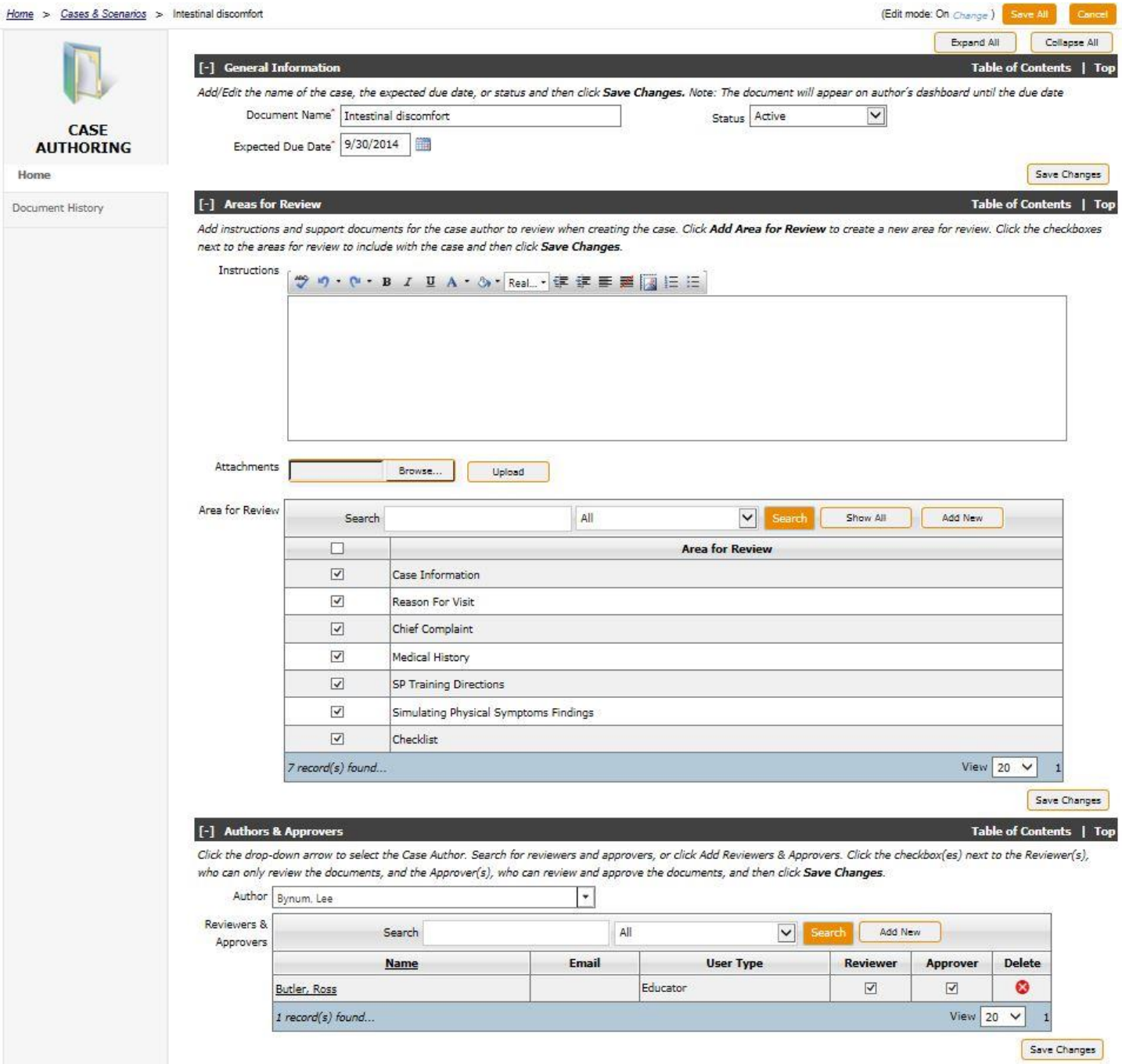
Note: The author of either the Case Authoring document or the training case does not have to be the same person. For example, a faculty member could create the Case Authoring document but designate another faculty member as the author.

To create a new Case Authoring document, click the **New** button as shown below.



The following dialog appears:

Enter the required information and press the **Create** button; the following appears:



The General Information section appears with the data already entered. Select the Areas for Review to be used in the training case.

Select the author of the Case Authoring document by clicking the drop-down arrow next to the **Author** field in the Authors & Approvers section. Select the Reviewers and Approvers at this section also.

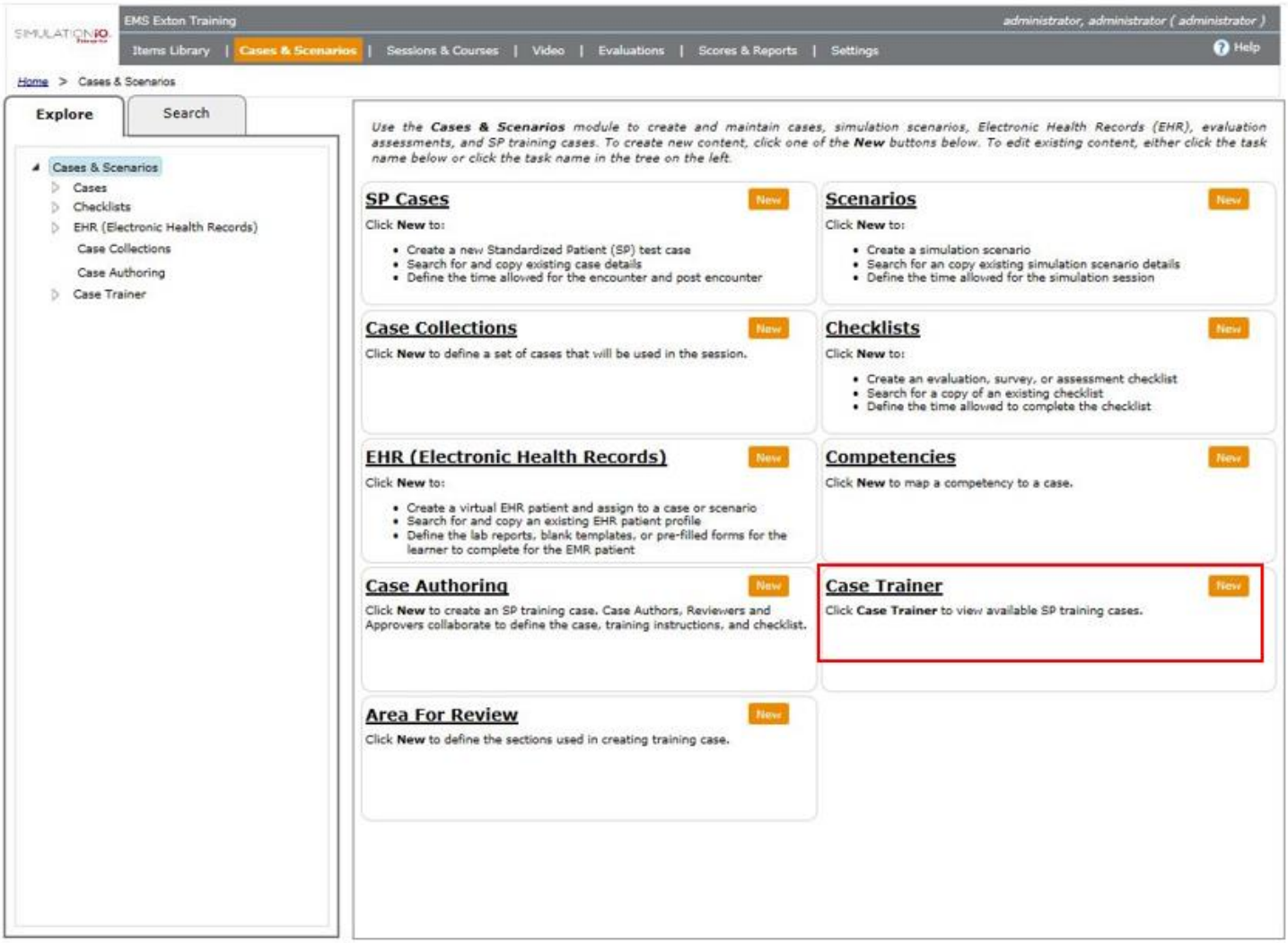
(**Note**: In the Intestinal Discomfort Case Authoring document, Lee Bynum is defined as the Author and Ross Butler is defined as the Reviewer/Approver.)

Press **Save Changes** to retain your Case Authoring selections.

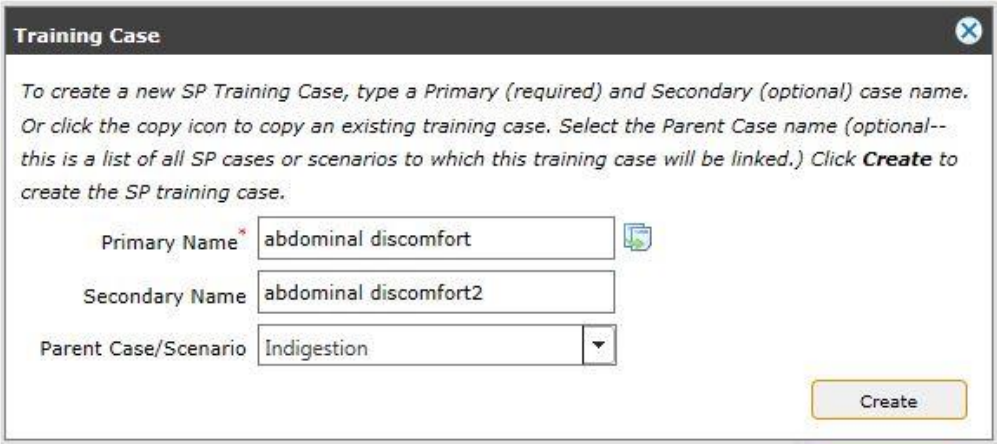
Create Training Case

After creating the Case Authoring document, it must now be linked to a training case; this provides additional information to the SP, Learner, or Educator for their self-study.

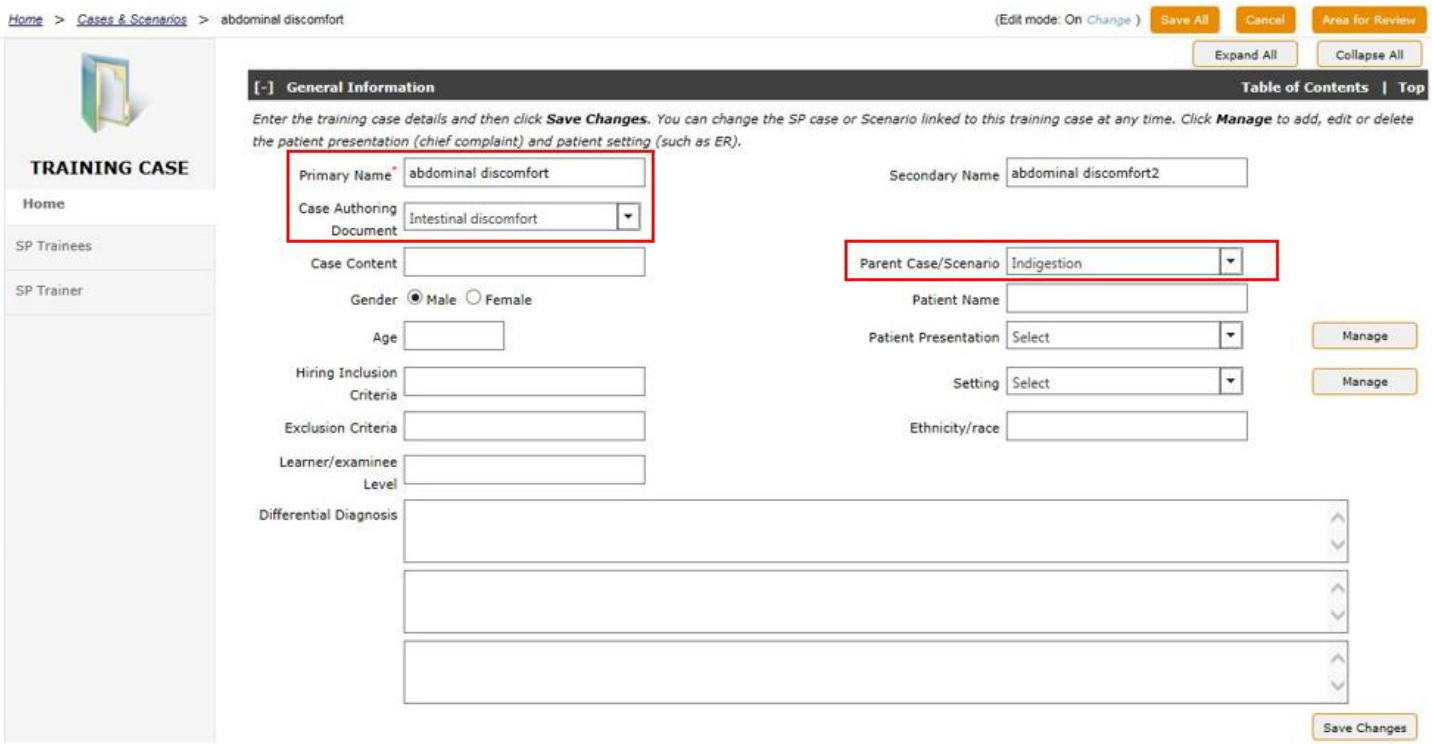
To create a new Case Training case, click the **New** button as shown below.



The following dialog appears:



Press **Create**, and the following appears:

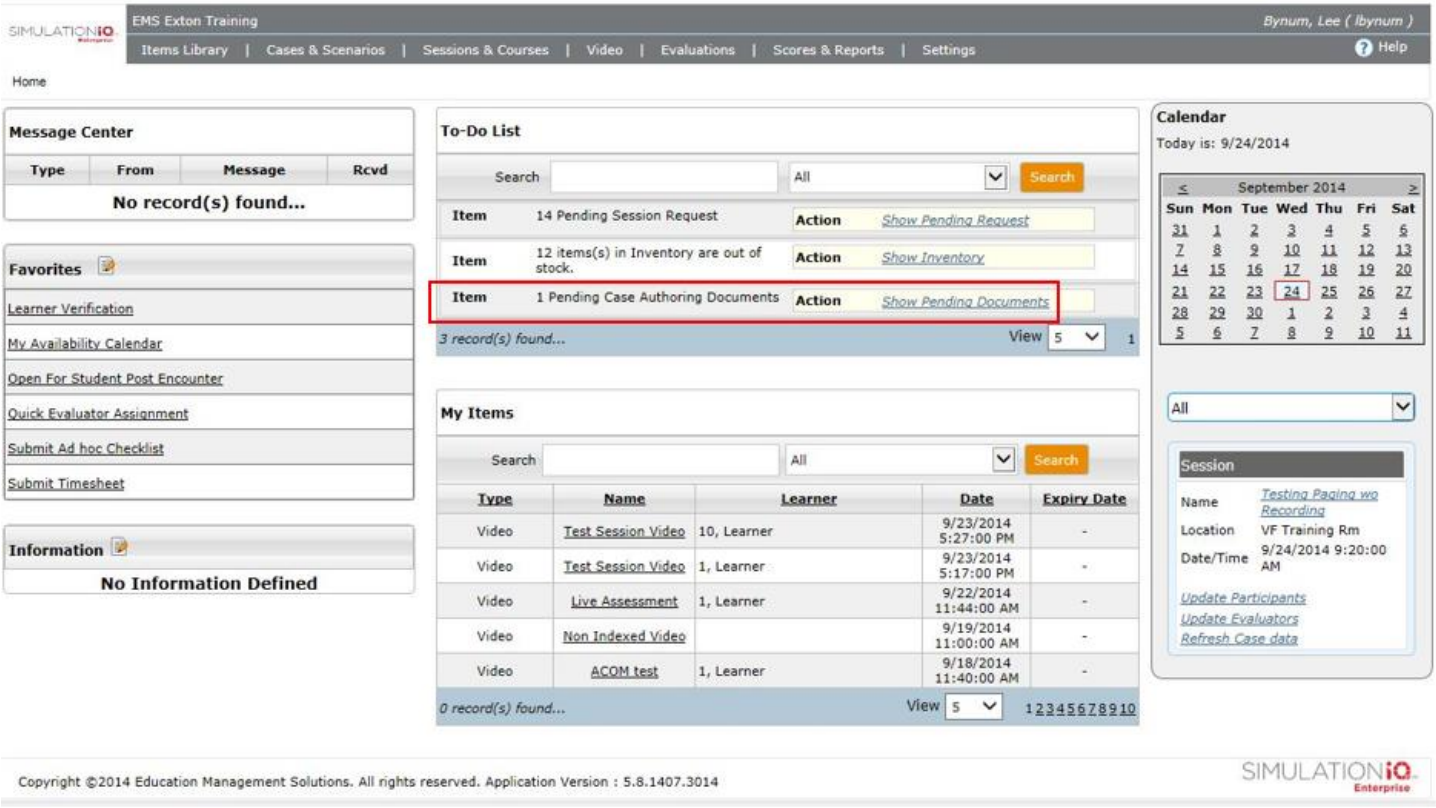


(For this example, the Abdominal Discomfort training case links the Indigestion Parent Case/Scenario and the Intestinal Discomfort Case Authoring document.)

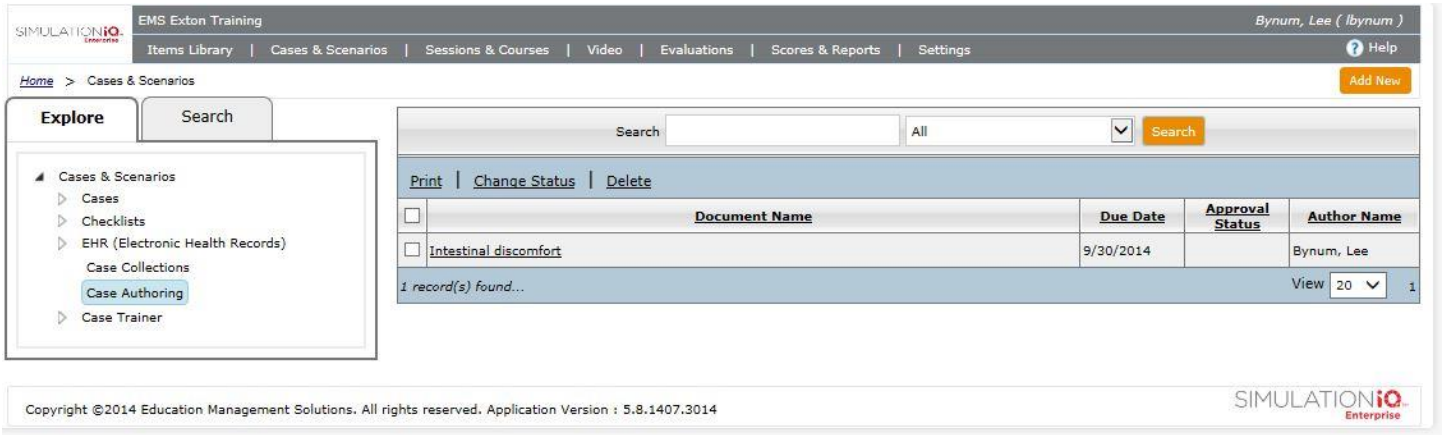
After entering General Information and attaching any documents or multimedia files, as well as using the Tool Belt to define SP Trainees and the SP Trainer, press **Save All**.

Case Author (Originate)

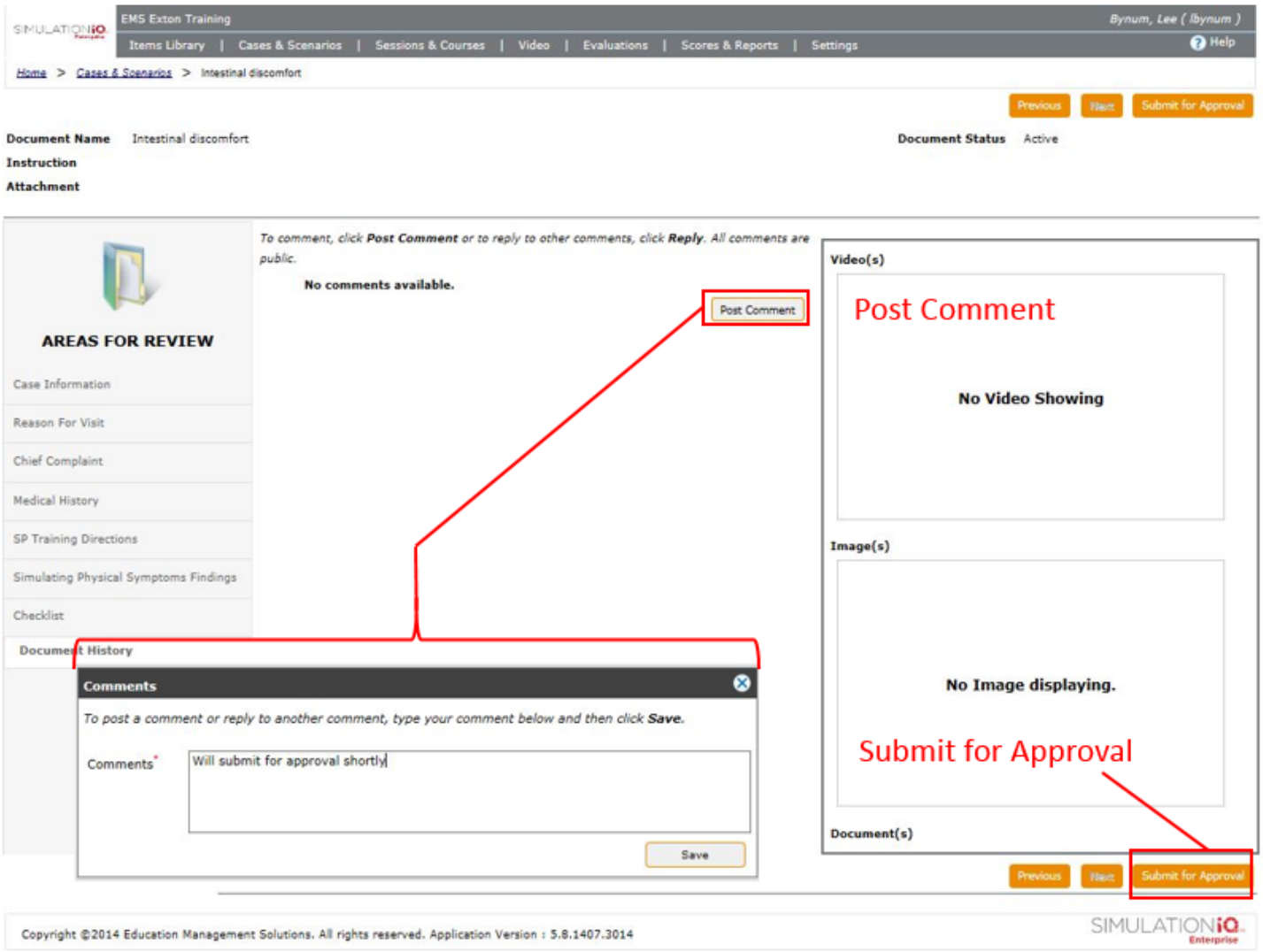
The Case Authoring document author logs onto SIMULATIONiQ Enterprise as shown below:

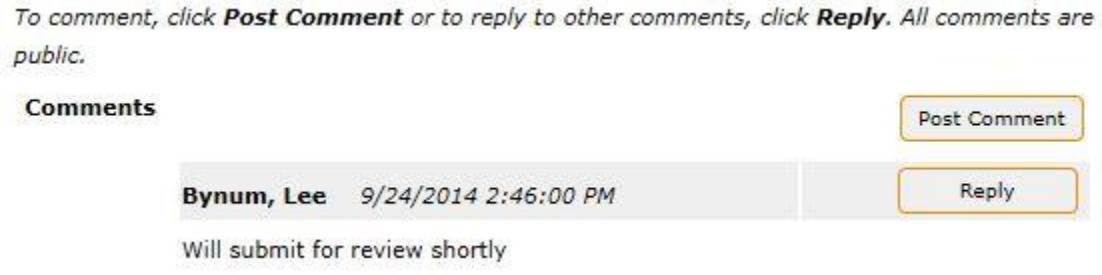


Click the **Show Pending Documents** link to access the Case Authoring document as follows:

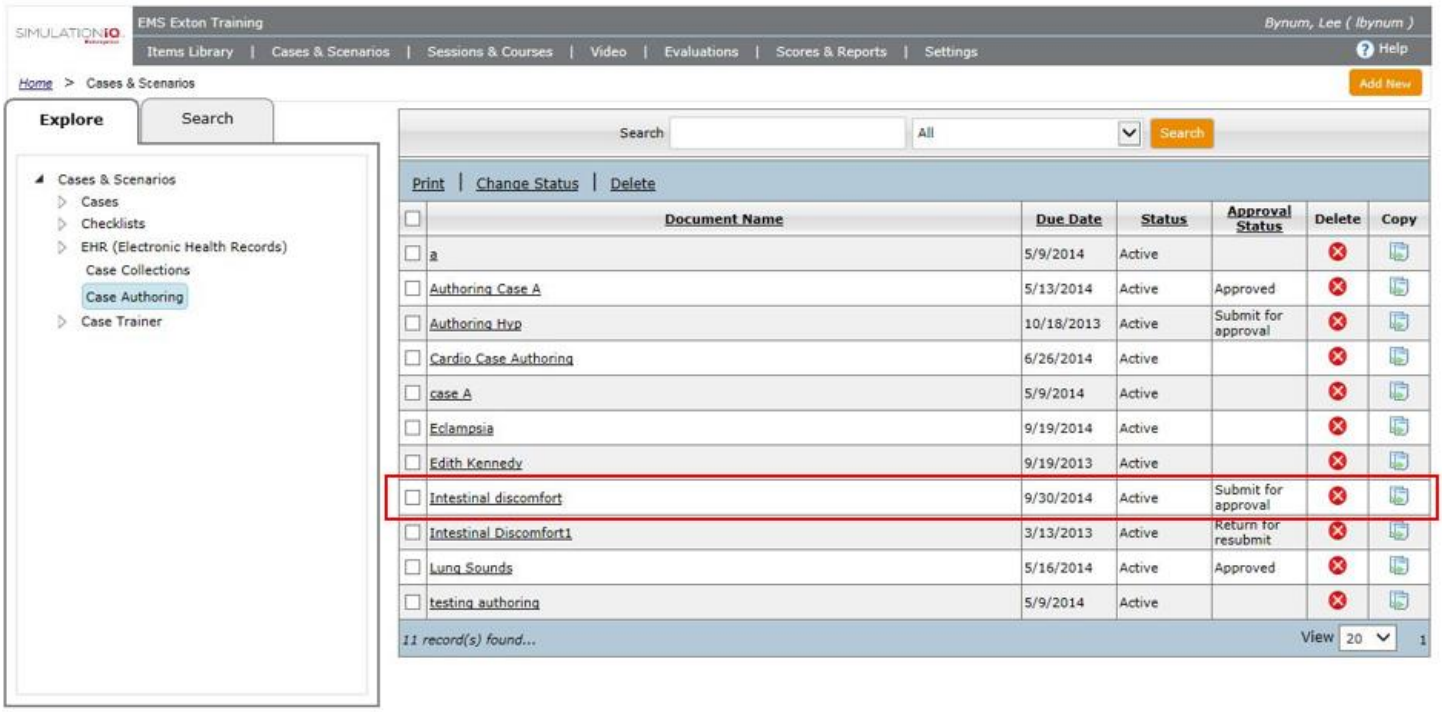


From here, the author can review the Case Authoring document and post any comments by pressing the **Post Comment** button (under **Document History** in the Areas for Review tool belt as shown).



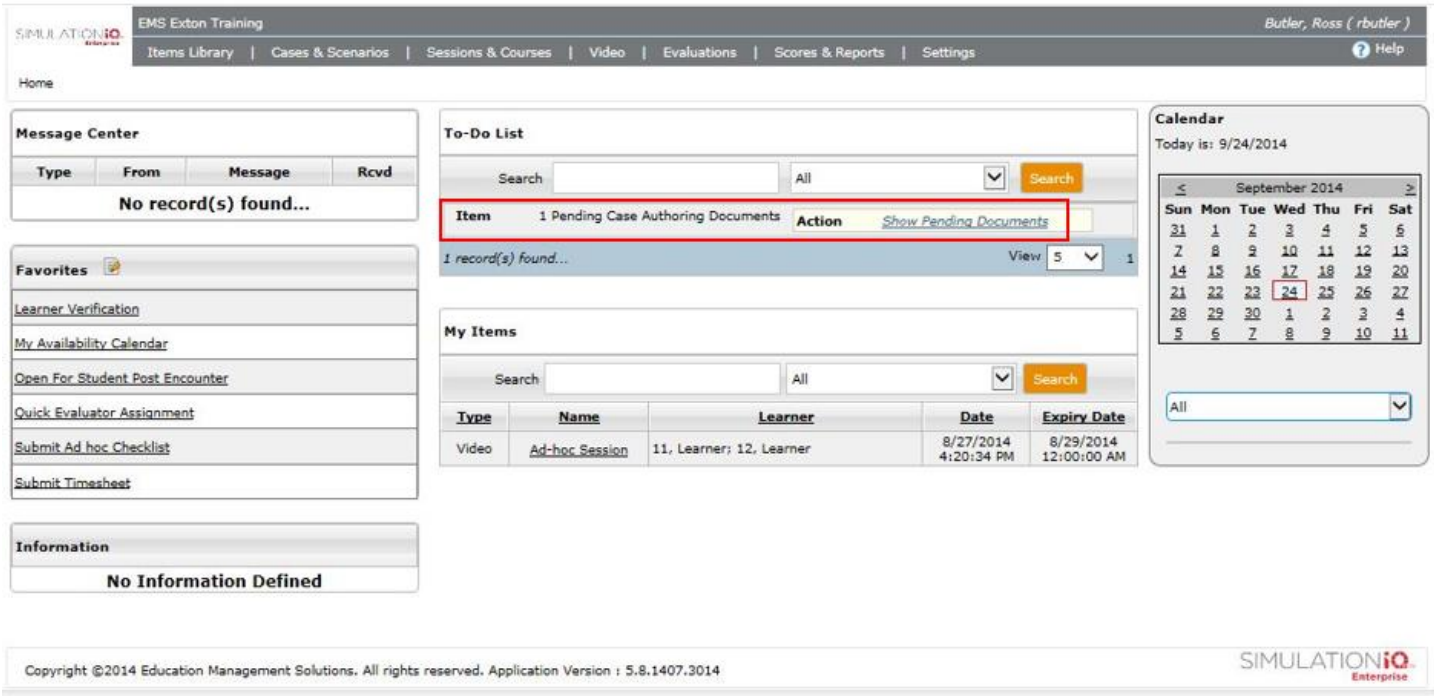


The author can then press the **Submit for Approval** button to send the Case Authoring document to the reviewer (the Approval Status appears as follows).

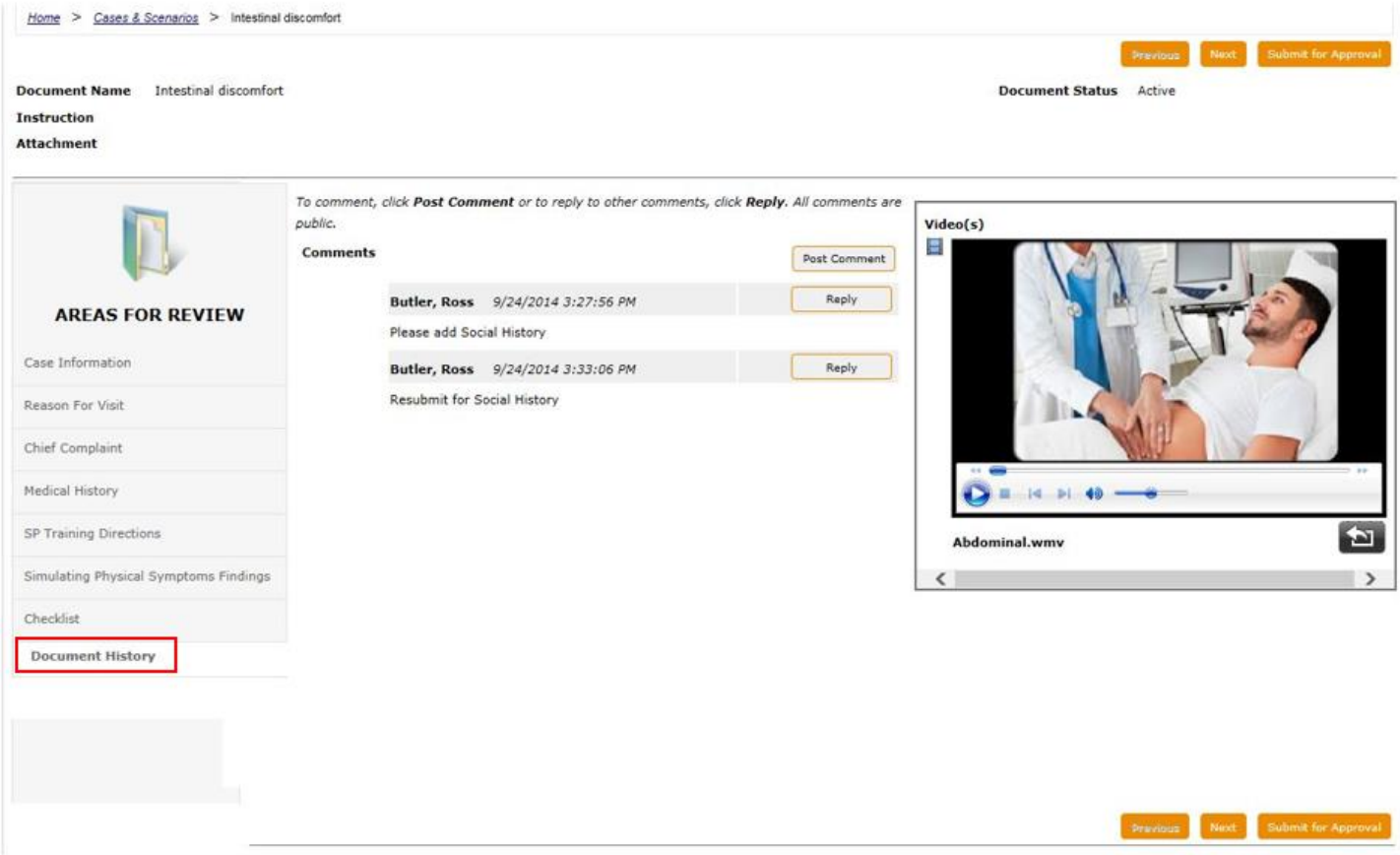


Reviewer (Review)

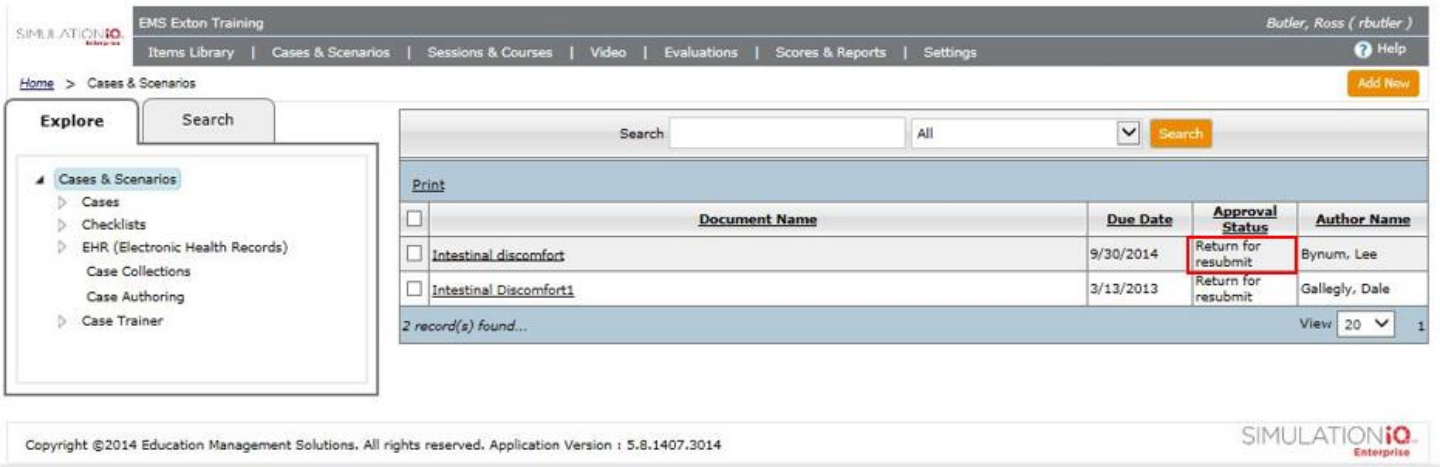
The Case Authoring reviewer logs onto SIMULATIONiQ Enterprise and views the following at the dashboard:



Click the **Show Pending Documents** link to view the following:

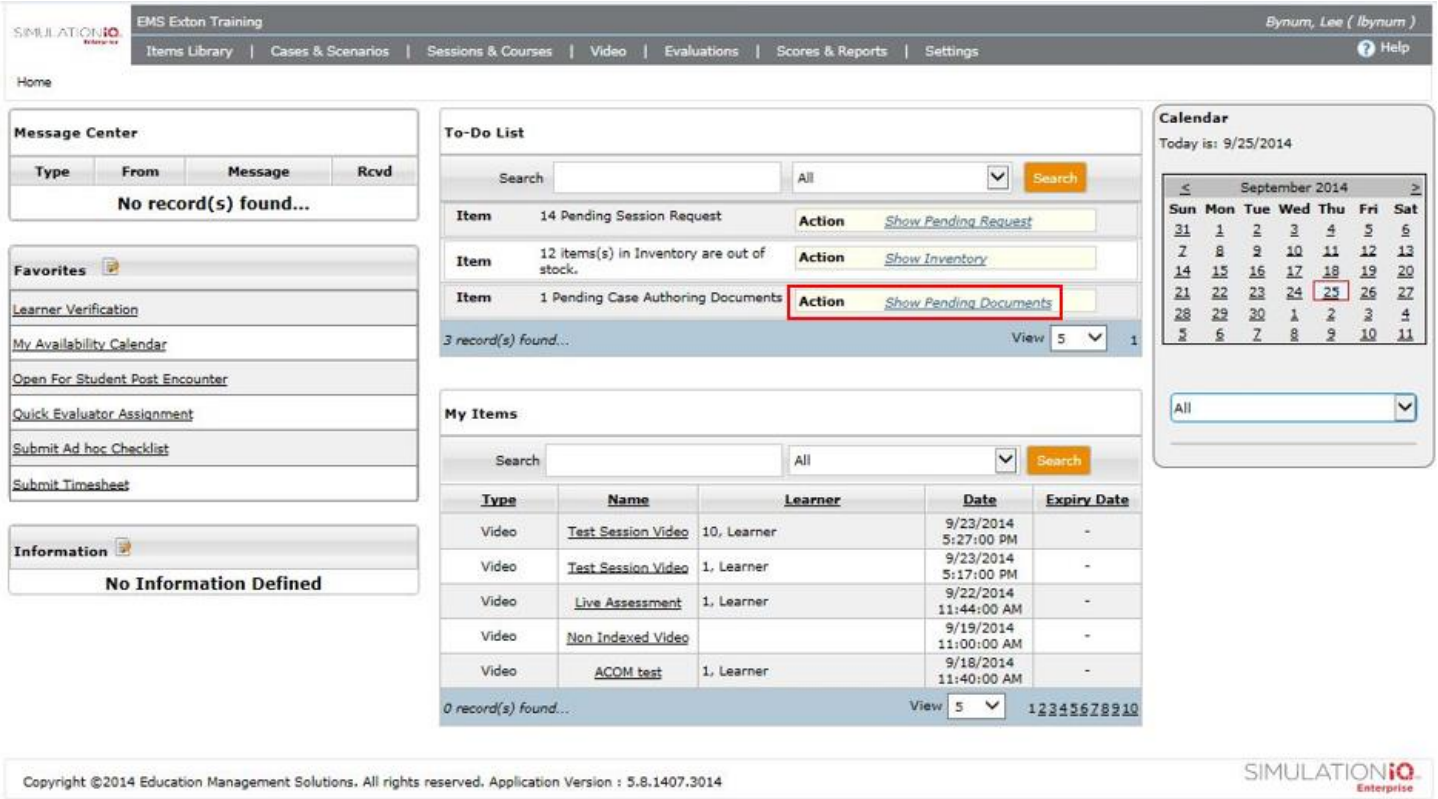


From here, the reviewer can view the Case Authoring document details and either take no action or return the document to the author with comments.

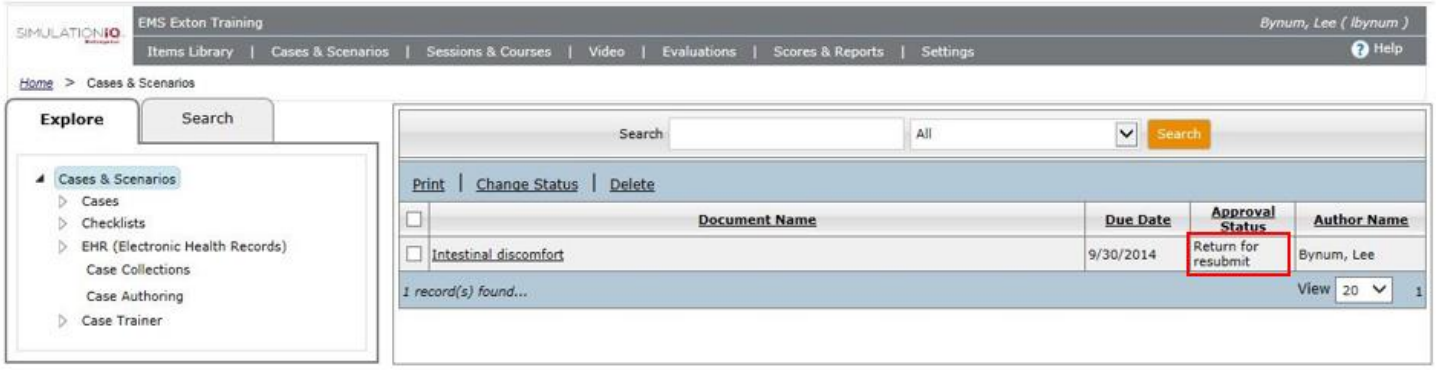


Case Author (Resubmit)

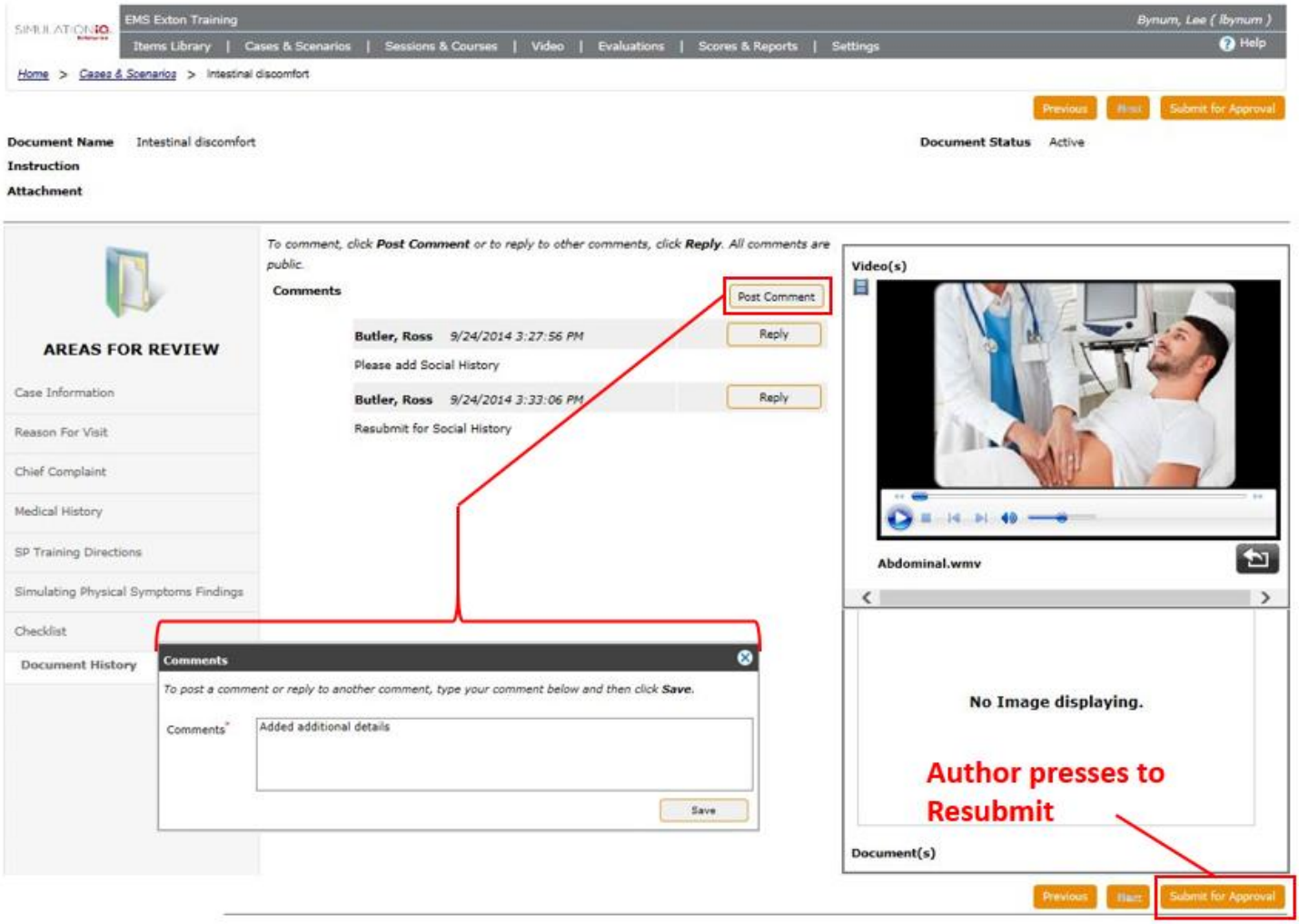
After the document is returned, the author can access the document as follows from the dashboard:



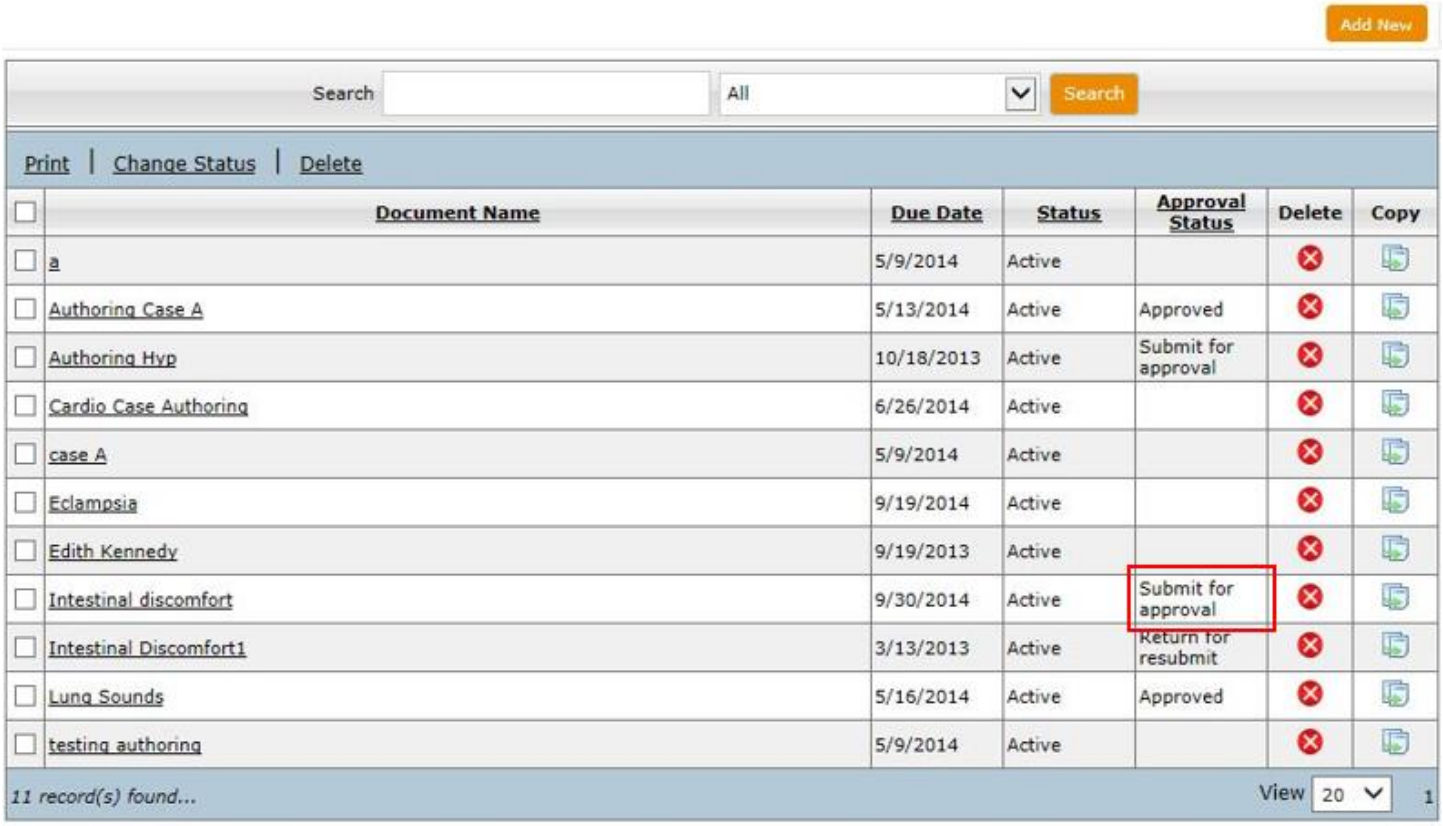
Click the **Show Pending Documents** link to access the Case Authoring document as follows:



The author updates the Case Authoring document as follows (press **Submit for Approval** when ready to resend the document to the Approver).

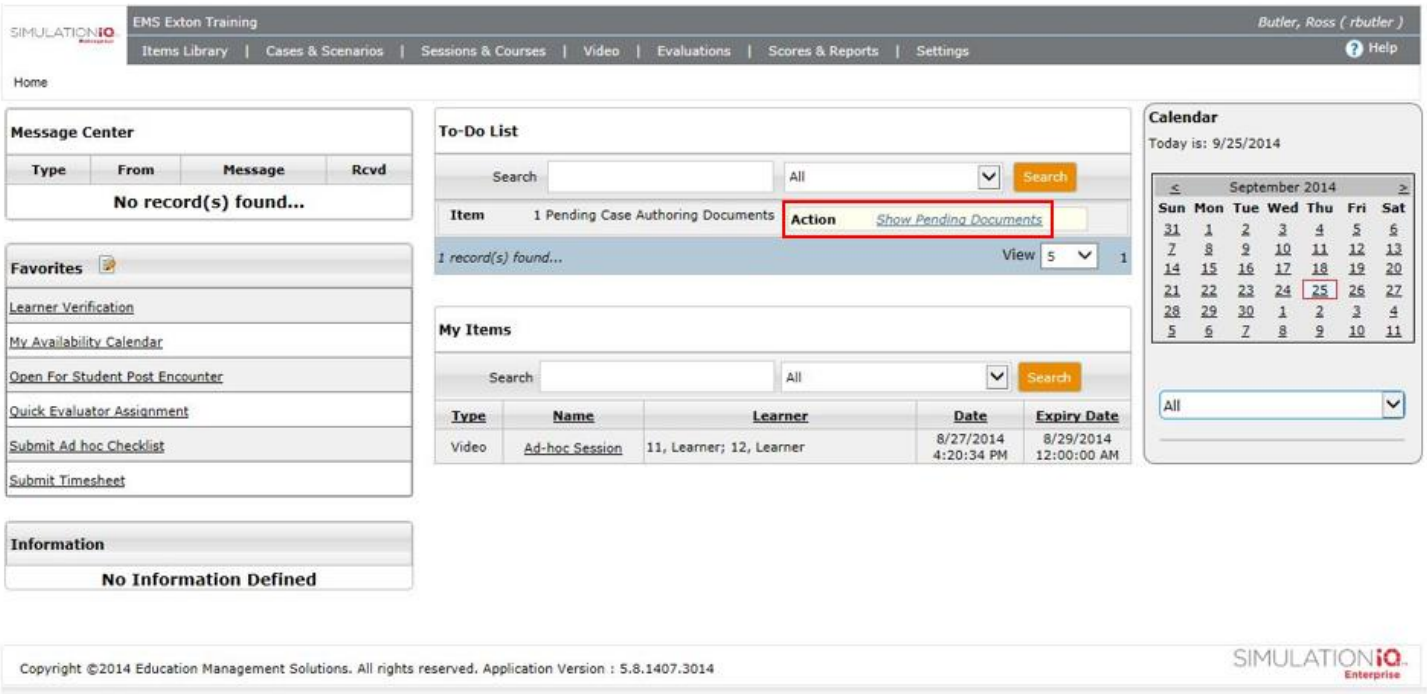


This changes the status of the Case Authoring document as shown.

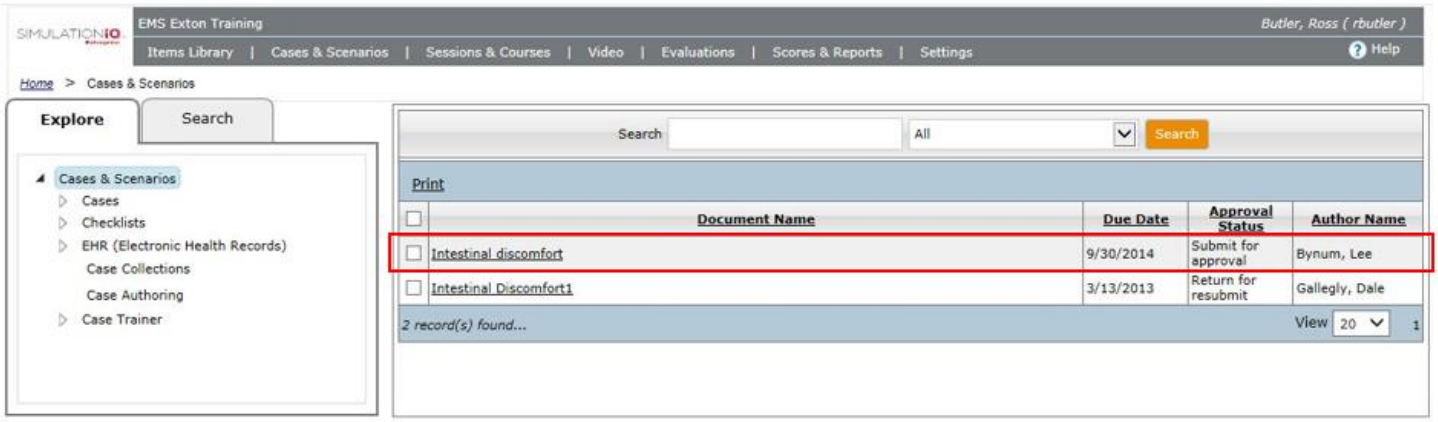


Approver (Approve)

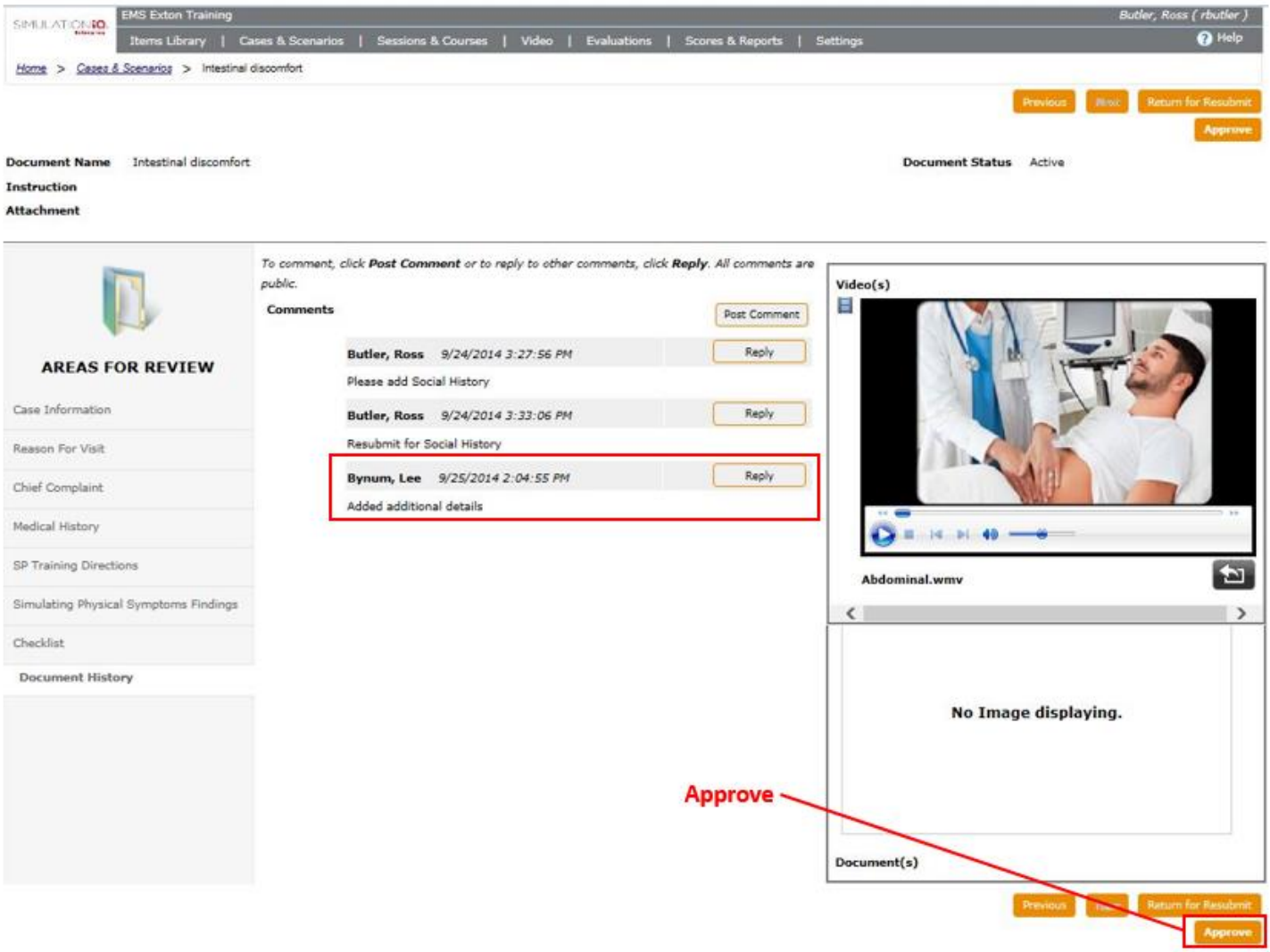
After the author resubmits the Case Authoring document, it appears on the Approver's dashboard as shown:



The Approver clicks the **Show Pending Documents** link to view the following:



Click the **Document Name** to view the following:



From here, the Approver can either click **Return to Resubmit** or **Approve** (if Approve is selected, a confirmation message appears).

Clicking **Approve** sends the Case Authoring document to the dashboard as follows:

Add New

Search | All | Search

Print

	Document Name	Due Date	Approval Status	Author Name
☐	Intestinal discomfort	9/30/2014	Approved	Bynum, Lee
☐	Intestinal Discomfort1	3/13/2013	Return for resubmit	Gallegly, Dale

2 record(s) found... View 20 1