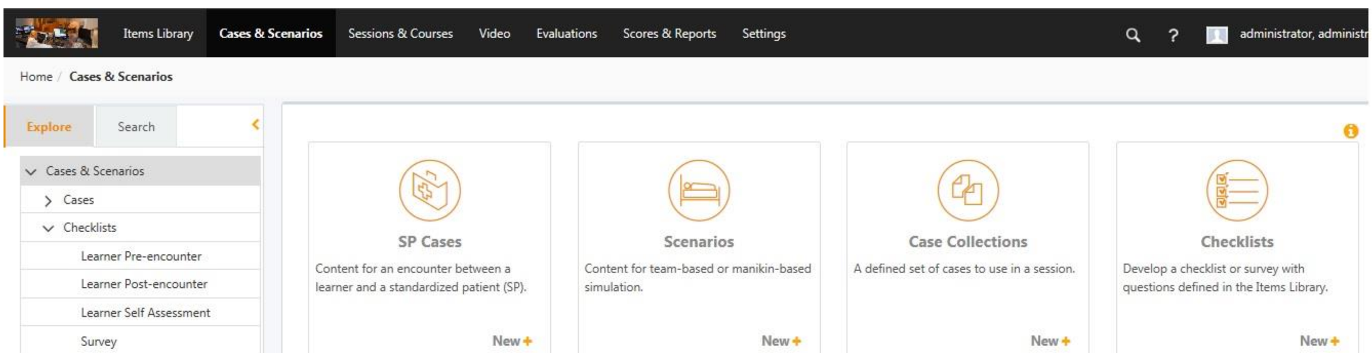
Create a Checklist

A Checklist is a pre-defined set of questions used to assess the performance of a learner(s) or an SP during an encounter. Develop checklists or surveys with questions defined in the Items Library. Once a checklist is created, it is available for use in any case or scenario.

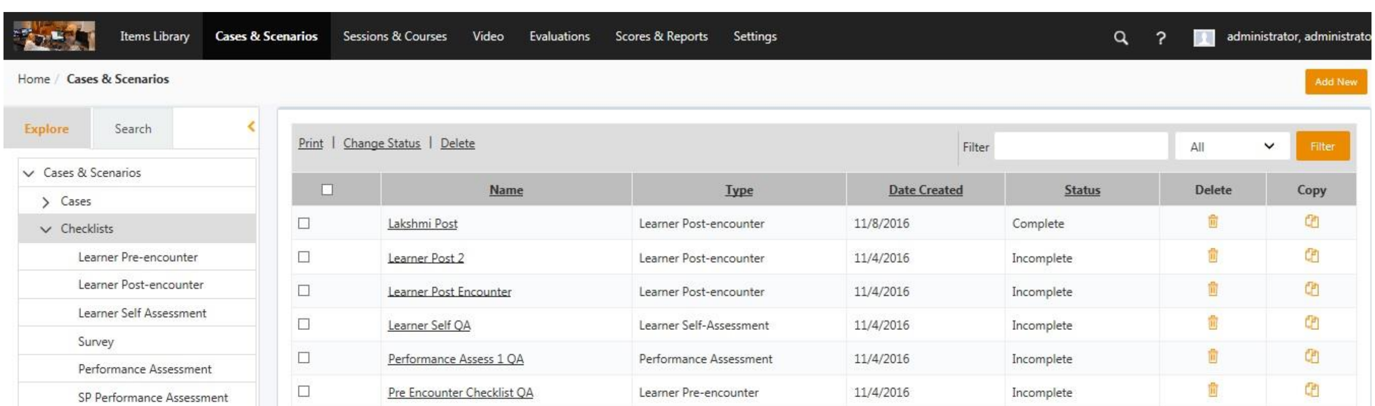
Evaluation types:	Completed by:	Applies to SP Cases	Applies to Scenarios	Needs a Category	When is it delivered User's dashboard?	Applies to Learner's grade	Scored
Performance Assessment	Prime Evaluator QA Evaluator	One Performance Assessment questionnaire	Multiple Performance Assessment questionnaires according for each roles	✓	At time of session start	✓	✓
Team Assessment	Prime Evaluator QA Evaluator	X	✓	✓	At time of session start. NOTE – Session type needs to be “TEAM”	✓	✓ All team members receive the same score
SP Performance Assessment (assesses the performance of the SP)	Any Evaluator (SP or Educator)	✓	X	✓	It is accessible in the Video Activity page of that session's recording.	X	✓
Pre Sim Study	Learner	X	✓	X	As defined in Scenario Activity page	X	X
Pre Encounter	Learner	✓	✓	X	As defined in Case or Scenario Activity page	✓	✓
Post Encounter	Learner	✓	✓	X	At time of session start.	✓	✓
SOAP Notes	Learner	✓	X	X	At time of session start.	✓	✓
Patient Notes	Learner	✓	X	X	At time of session start.	✓	✓
Computer Exercise	Learner	✓	X	X	At time of session start.	✓	✓
Learner Self-Assessment	Learner	✓	✓	✓	At time of session start or as defined on Session Activity page	X	✓

Peer Assessment	Any User	✓	✓	✓	At time of session start or as defined on Session Activity page	X	✓
Survey on SP Case or Scenario Activity page	Learner	✓	✓	X	Follows Post Encounter questions	X	X
Survey on Session Page	Learner	✓	✓	X	End of Session	X	X
Scheduled Survey (Independent of a Session)	Any User	X	X	X	When scheduled	X	X

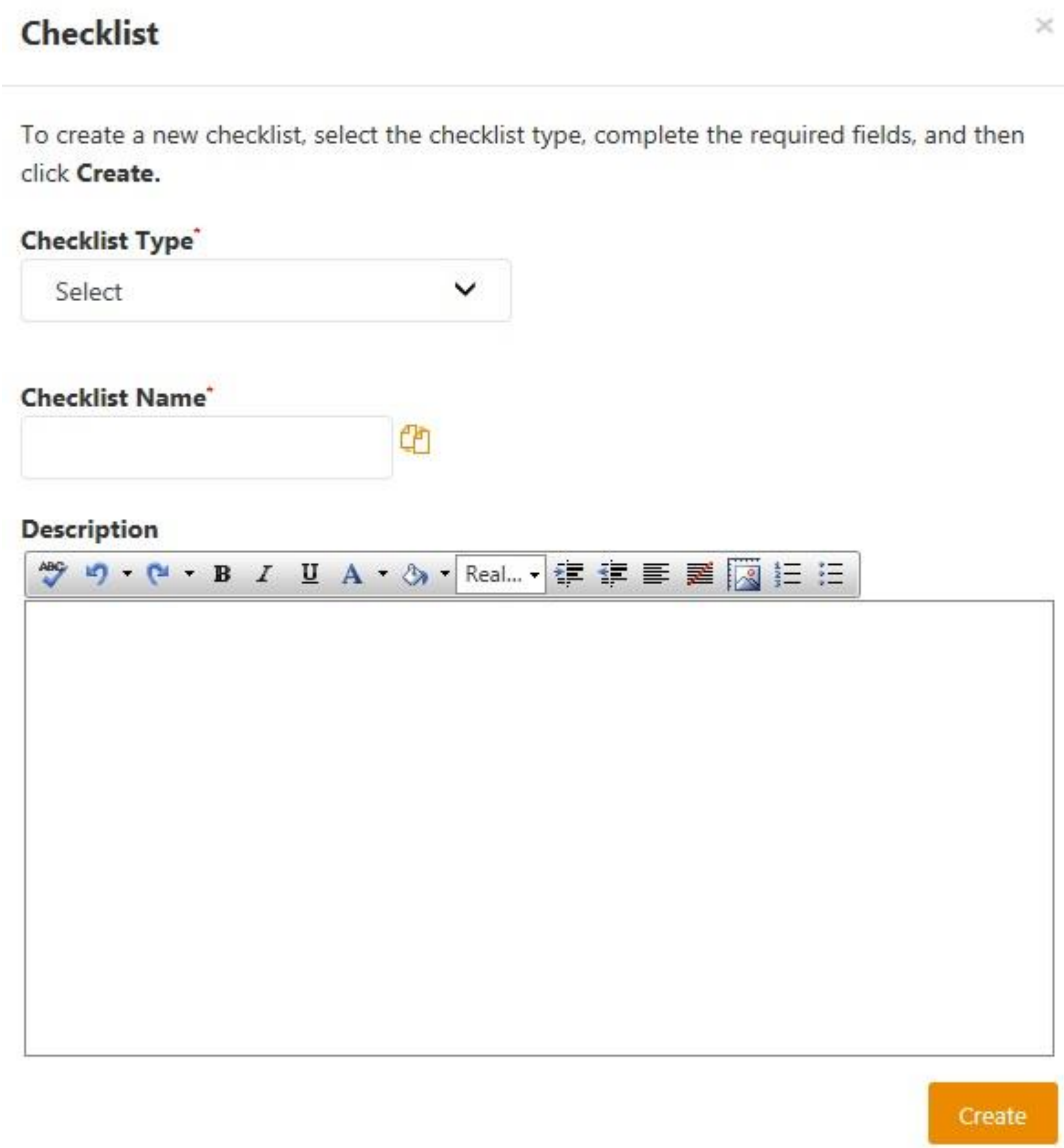
Create a Checklist



1. Click **Cases & Scenarios > Checklists.**



2. Click **Add New.**



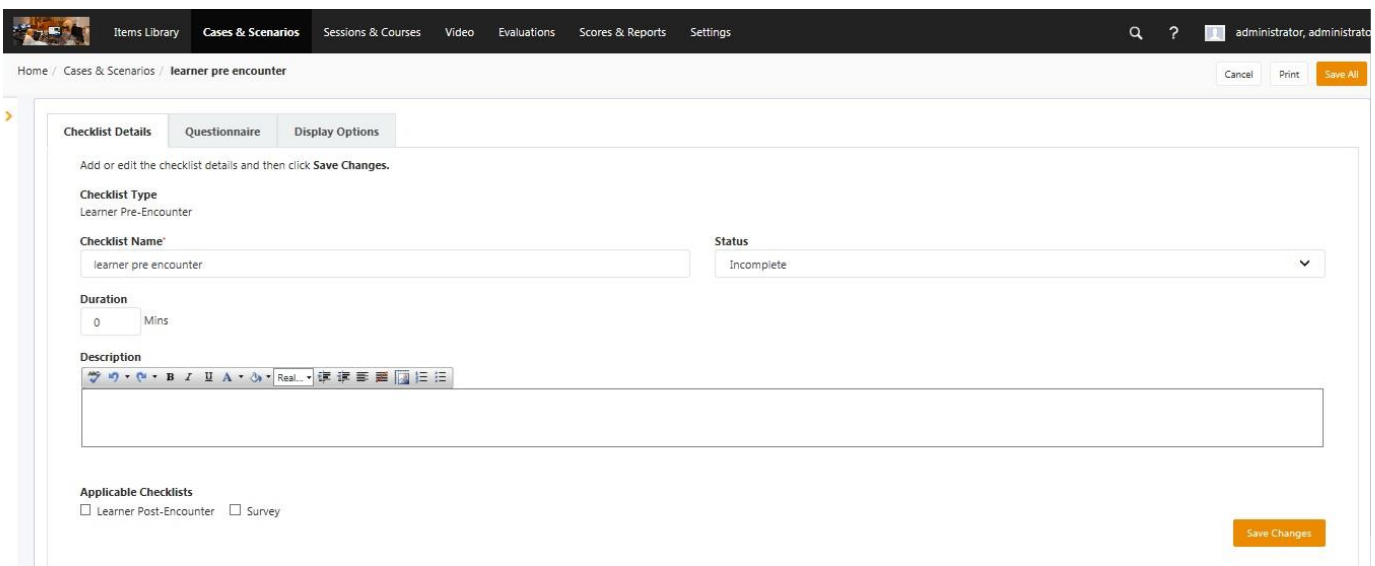
3. Select the **Checklist Type*:**

Checklist Types	
Learner Pre-encounter	A checklist to be made available to the learner before the SP encounter.
Learner Post-encounter	A questionnaire, Computer Exercise, SOAP Note or Patient Note to be presented to the learner after the encounter.
Learner Self-Assessment	Checklist questions presented to the learner to assess his or her own performance.

Performance Assessments	
Performance Assessment	Checklist questions presented to an evaluator to assess learner performance.
SP Performance Assessment	An assessment of the SP's presentation as a realistic patient.
Survey	A Checklist presented to the learner at the conclusion of the case/scenario or session. Note: 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.

3. Enter the **Checklist Name*.**
4. Enter a **Description** of the checklist.
5. Select if the questions can be applied to other Applicable Checklists.
6. Click **Create**.

Checklist Details tab



1. Complete the following fields:

Field	Description
Status	Mark as Complete for the checklist to be usable.
Duration	Duration for checklist completion.
Description	Add a Description of the checklist.

Applicable Checklists	Select if the questions can be applied to other checklists.

2. Click **Save Changes**.

Questionnaire tab

1. Complete the following fields:

Field	Description
Questionnaire tab	
Instructions for the Evaluator	Instructions to help the Evaluator score the assessment.
Add From Library	Add existing questions. Search for question text in the Items Library, Checklists, or Cases/Scenarios, select the questions from the grid and then click Add.
Add Question	Create new questions and save to the Items Library for future use. See **Create Questions** for more information
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.
Select Format	Select the checklist format. The icons show the formation of the question and its comment box.

2. Click **Save Changes**.

Categories tab

1. Complete the following fields:

Field	Description
Categories list	Appear as questions are added.

2. Click **Save Changes**.