

Competency Evaluations - Management and Enrollment

Document and track observer evaluations of clinicians using Competency Evaluations. This article will guide you through the specifics of creating and using Competency Evaluations to ensure your clinicians are providing consistent and quality care.

🕒 Feb 15, 2023 · Knowledge

What are Competency Evaluations?

Competency Evaluations offer a digital solution to tracking observations or evaluations of a clinician by an observer. These evaluations contain a list of points of care that measure the knowledge, skills, and abilities needed for a specific practice setting. Any competency area can be tracked by creating your own evaluation.

User Roles

Competency Evaluation user roles are supplemental to existing roles and must be assigned in order to use evaluations. Competency Evaluation roles can be added from the User Profile by any Administrator.

Please Note: Evaluation Enrollment can only be assigned to users who already have the Administrator or Supervisor role.

- Evaluation Management:
 - Create, publish, and manage evaluations
 - Assign evaluators to evaluations
 - Access to Manage Evaluations
 - Access to Insights with the Administrator or Supervisor role
- Evaluation Enrollment:
 - Enroll Learners in evaluations

- Manage current evaluation assignments
- Access to Manage Enrollments
- Access to Insights with the Administrator or Supervisor role
- Evaluation Interaction:
 - View and conduct assigned evaluations
 - Access My Assignments

<p>Last Name *</p> <input type="text" value="Avery"/>	<p>Role</p> <p><input type="checkbox"/> Administrator</p> <p><input type="checkbox"/> Instructor</p> <p><input type="checkbox"/> Supervisor</p> <ul style="list-style-type: none"> <input type="checkbox"/> User Management <input type="checkbox"/> Enrollment Management <ul style="list-style-type: none"> <input type="checkbox"/> Training Plan Enrollment <input type="checkbox"/> Module Enrollment <input type="checkbox"/> Report Management <p><input type="checkbox"/> Competency Tracker Reporter</p> <p><input type="checkbox"/> Skills Checklist Observer</p> <p><input type="checkbox"/> Skills Checklist Data Entry</p> <p><input checked="" type="checkbox"/> Learner</p>
<p>User Name *</p> <input type="text" value="JAvery"/>	<p>Competency Evaluations Permissions</p> <p><input type="checkbox"/> Evaluation Management</p> <p><input type="checkbox"/> Evaluation Enrollment</p> <p><input type="checkbox"/> Evaluation Interaction</p>
<p>Change Password</p> <input type="text"/>	
<p>Confirm Password</p> <input type="text"/>	
<p><input type="checkbox"/> Require password change on next login</p>	
<p>Contact Info</p> <p>Email *</p> <input type="text" value="javery@yourcompanyemail.com"/>	
<p>Phone</p> <input type="text"/>	
<p>Address</p> <input type="text"/>	

Insights

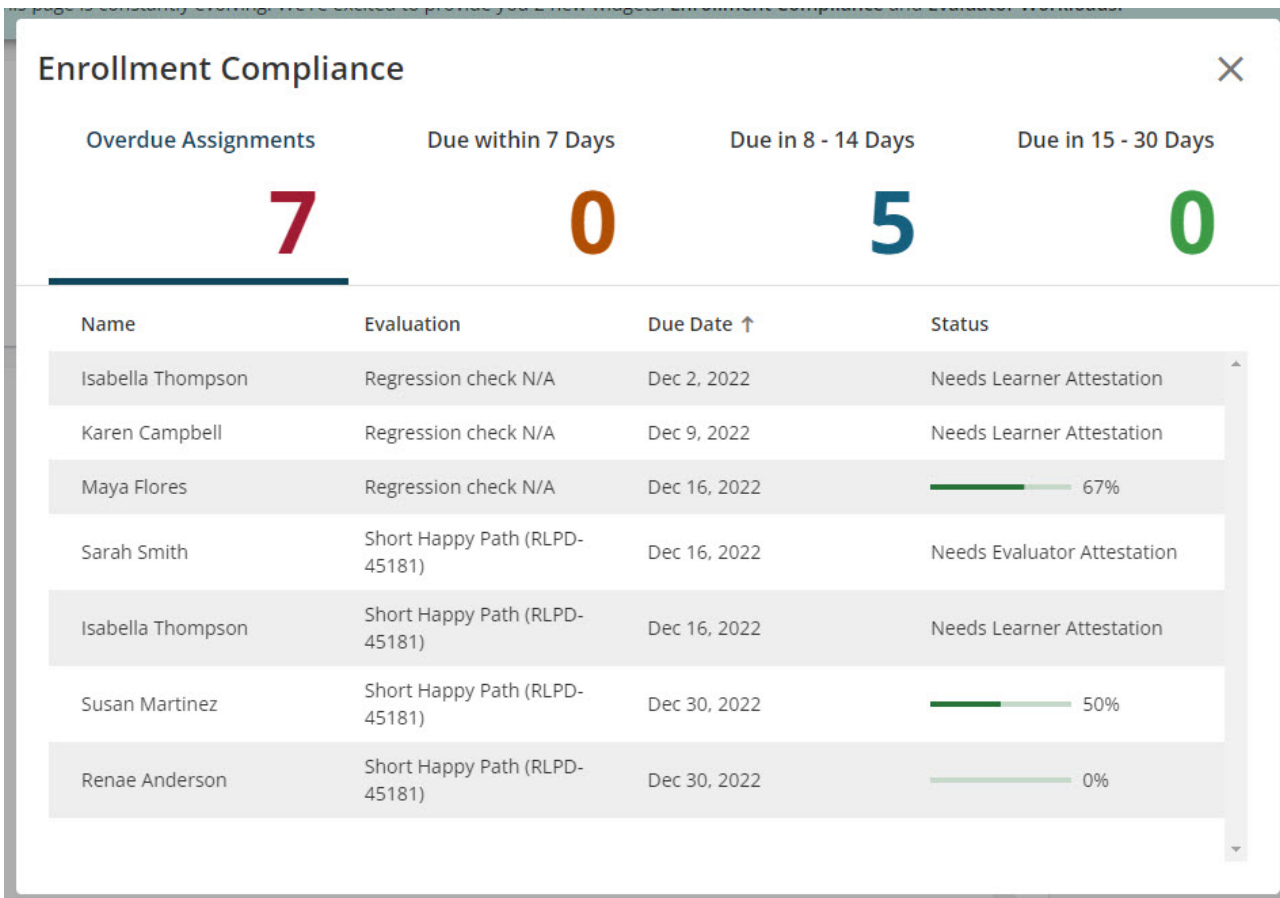
The Insights page is a management console providing you with snapshots of competency evaluation assignments and progress. Those with the Evaluation Management and/or Evaluation Enrollment user roles have access to the Insights page if they also have the Administrator and/or Supervisor role as well. Widgets on this page compile actionable insights to assist with managing your competency program. Click on a widget to view details.

The screenshot shows a dashboard with a dark blue sidebar on the left containing navigation options: OVERVIEW (Dashboard), SOLUTIONS (Learning, Competency Evaluations), Insights (Manage Enrollments, Manage Evaluations), MANAGE (Users, Reports, Settings), and RESOURCES (Help). The main content area has a light blue header with a message: "This page is constantly evolving! We're excited to provide you 2 new widgets: Enrollment Compliance and Evaluator Workloads!" and a "CLICK FOR MORE DETAILS" link. The "Enrollment Compliance" widget displays four categories: Overdue Assignments (7), Due within 7 Days (0), Due in 8 - 14 Days (5), and Due in 15 - 30 Days (0). Below it, the "Evaluator Workloads (last 30 days)" table lists five evaluators with their respective workloads.

Name	In Progress ↓	Attested	Attested On Time
Zelda Wilson	8	0	0 (0%)
Kori Martel	5	0	0 (0%)
Adrienne O'Brian	4	0	0 (0%)
Kelli Martin	3	0	0 (0%)
Kuno Masha	1	0	0 (0%)

Enrollment Compliance

Keep a close track on compliance using the Enrollment Compliance widget. Assignments are tallied into four due date ranges giving you a snapshot of what is upcoming or overdue (i.e. out of compliance). Click on the widget to open assignment details for each due date range including completion percentage.



Please Note: Completion percentage is the amount of competency statements rated in an evaluation. Since attestations are required for completion, evaluations may remain in Insights widgets as 100% complete until their attestations are submitted.

Evaluator Workloads

Review the number of evaluations assigned to each evaluator and their completion progress using the Evaluator Workloads widget. Data in this widget is updated daily to reflect progress within the past 30 days. Click on a row in this table to view workload details.

← **Zelda Wilson's Open Enrollments**

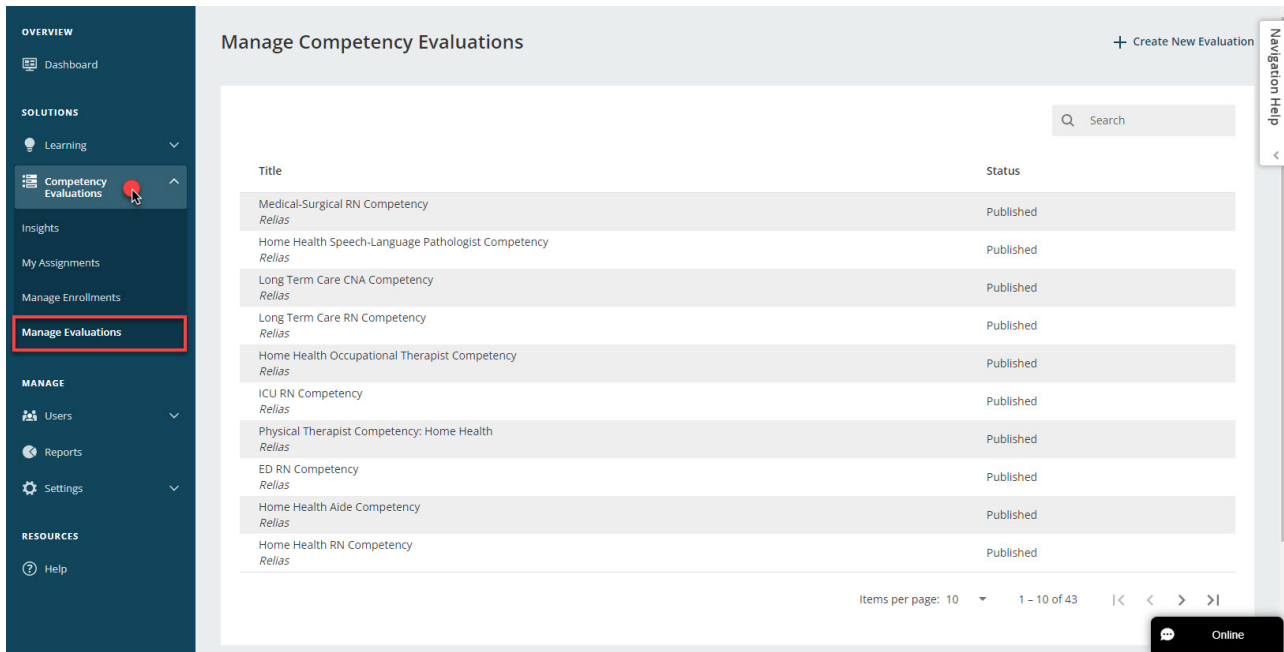
Learner	Evaluation	Due Date ↑	Status
Sarah Smith	Short Happy Path (RLPD-45181)	Dec 16, 2022	Needs Evaluator Attestation
Rena Anderson	Short Happy Path (RLPD-45181)	Dec 30, 2022	<div style="width: 0%; background-color: #28a745; height: 10px;"></div> 0%
Susan Martinez	Short Happy Path (RLPD-45181)	Dec 30, 2022	<div style="width: 50%; background-color: #28a745; height: 10px;"></div> 50%
Adrienne O'Brian	Creating a Competency Evaluation	Feb 3, 2023	<div style="width: 0%; background-color: #28a745; height: 10px;"></div> 0%
Maya Flores	Creating a Competency Evaluation	Feb 3, 2023	<div style="width: 0%; background-color: #28a745; height: 10px;"></div> 0%
Faith Murphy	Creating a Competency Evaluation	Feb 3, 2023	<div style="width: 0%; background-color: #28a745; height: 10px;"></div> 0%
Kuno Masha	Creating a Competency Evaluation	Feb 3, 2023	<div style="width: 0%; background-color: #28a745; height: 10px;"></div> 0%

Manage Evaluations

To create, view, or edit evaluations, go to the Manage Evaluations tab on the left-hand navigation bar. This page lists all evaluations on your site and their status.

Evaluations have three statuses: published, draft, and archived. Published evaluations are available to be assigned to Learners. Evaluations in Draft have not been published and are not available to be assigned. Archived evaluations are no longer available for assignment.

The Search bar will allow you to search by evaluation title or status. Click on the title of any evaluation to view its contents.



Please Note: Only those with the Evaluation Management role will be able to access Manage Evaluations.

Creating a Competency Evaluation

Start creating a new evaluation by clicking “+ Create New Evaluation.”

Manage Competency Evaluations

[+ Create New Evaluation](#)

Title	Status
Medical-Surgical RN Competency <i>Relias</i>	Published
Home Health Speech-Language Pathologist Competency <i>Relias</i>	Published
Long Term Care CNA Competency <i>Relias</i>	Published
Long Term Care RN Competency <i>Relias</i>	Published
Home Health Occupational Therapist Competency <i>Relias</i>	Published
ICU RN Competency <i>Relias</i>	Published
Physical Therapist Competency: Home Health <i>Relias</i>	Published
ED RN Competency <i>Relias</i>	Published
Home Health Aide Competency <i>Relias</i>	Published
Home Health RN Competency <i>Relias</i>	Published

In the Properties tab, fill in a title for your evaluation and explain its purpose in the Description field.

← Back to Manage EvaluationsSaved at 8:59:00 AM EDT ✓

Creating a Competency Evaluation

Status: Draft

PROPERTIESTEMPLATECONTENTEVALUATORSREVIEW & PUBLISH

Title *

32 / 150

Description

This evaluation will track the knowledge needed to create your own Competency Evaluation.

89 / 1000

[Navigation Help](#)

As you add information to your new evaluation, your changes will save automatically. There is no need to click a Save button before moving to the next tab!

Template

The Template tab is where you will determine the layout of your evaluation. The right side of this page contains a template preview. As you make changes to the configuration using the options on the left, the template preview will update to show you what your evaluation will look like.

← Back to Manage Evaluations

Creating a Competency Evaluation

Status: Draft

PROPERTIES **TEMPLATE** CONTENT EVALUATORS REVIEW & PUBLISH

Competency Levels

Number of Levels: 3 4

Labels

Level 1:
Domain 6 / 25

Level 2:
Topic 5 / 25

Level 3:
Competency Statement 20 / 25

Level 4:
Skill/Task 10 / 25

Rating Scale

Template Preview

NOTE: Build and edit the structure of your evaluation on the left and preview it below. Click on the dropdowns to expand and view selected rating scale and verification method options.

Domain: Lorem ipsum dolor sit amet, consectetur adipiscing elit

Topic: Aenean commodo interdum gravida

Competency Statement 1: Ut nec purus nulla Rating ▼

Skill/Task a. Donec imperdiet augue ipsum, et egestas nibh lacinia ut

Competency Statement 2: Vestibulum quis faucibus lorem Rating ▼

Competency Levels

Under the Competency Levels section, you can choose between three or four levels. Using four levels will include an option to add Skill/Task levels under each Competency Statement as seen in the images below.

Each level comes with a default name that can be changed to match your organization's language.

The image displays two overlapping screenshots of a web-based interface for creating competency evaluation templates. The top screenshot shows a 'Template Preview' for a 3-level evaluation. On the left, the 'Competency Levels' panel shows 3 levels selected, with labels for Domain, Topic, and Competency Statement. The 'Rating Scale' panel has 'Met, Not Met' selected. The 'Template Preview' on the right shows a domain, a topic, and three competency statements, each with a 'Rating' dropdown. A 'Comments (Optional)' field is at the bottom. The bottom screenshot shows a similar interface but for a 4-level evaluation. It includes an additional 'Skill/Task' level. The 'Competency Levels' panel shows 4 levels selected, with labels for Domain, Topic, Competency Statement, and Skill/Task. The 'Rating Scale' panel is the same. The 'Template Preview' on the right shows a domain, a topic, three competency statements, and three skill/task statements, each with a 'Rating' dropdown. A 'Comments (Optional)' field is also present.

Rating Scales

Rating scales determine how the evaluation will be scored. These are the options that evaluators will be choosing when observing a learner. When an evaluation is completed, an average score will be calculated based on the rating scale's point system. The points associated with each rating scale are listed below.

- Met, Not Met:

- Met = 1
- Not Met = 0
- Exceeds, Meets, Does Not Meet:
 - Exceeds = 2
 - Meets = 1
 - Does Not Meet = 0
- Meets, Making Progress, Does Not Meet:
 - Meets = 1
 - Making Progress = 0.5
 - Does Not Meet = 0

Rating options are determined by which rating scale you choose. However, selecting "Include 'N/A' as a rating option for every competency statement" will allow "N/A" to be included as a rating option. N/A can also be set as an option for individual levels under the Content tab.

Rating options can be associated with third or fourth levels of the evaluation depending on the number of levels selected and how detailed you want the evaluation to be.

Rating Scale

Met, Not Met

Exceeds, Meets, Does Not Meet

Meets, Making Progress, Does Not Meet

Include "N/A" as a rating option for every competency statement

Rating will be associated with:

Competency Statement ▼

Narrative ?

Include Narrative

Narrative

Selecting the Narrative option will add comment fields at the end of the evaluation for evaluators to add details about the Learner's results. Evaluators can add comments to fields for Strengths, Areas of Improvement, Areas Not Yet Addressed, and Plan for Employee Development.

Every second level in the evaluation will have a comments field. This can be used by the evaluator to write any notes they have regarding the learner's performance on the competencies of that section.

The changes you make on the Template tab are saved automatically.

Content

The Content tab is where you will add level descriptions and competency statements to your evaluation. You can add as many levels to your evaluation as you need. How deep you can go with sublevels is determined by the number of levels chosen in the Template tab.

The three dots to the right of each level open actions to add new levels or delete them.

← Back to Manage Evaluations Saved at 9:15:11 AM EDT ✓

Creating a Competency Evaluation

Status: Draft

PROPERTIES TEMPLATE **CONTENT** EVALUATORS REVIEW & PUBLISH

▼ Domain

Verification Checks Before Creation ...

35 / 1000

▲ Domain

Create a Competency Evaluation ...

30 / 1000

▼ Topic

Navigation

Topic

Properties ...

10 / 1000

Context Menu for Properties:

- Add New Topic
- Add New Competency Statement
- Delete

If you did not select "Include 'N/A' as a rating option for every competency statement" in the Template tab, you will have the option to include N/A as an option for levels associated with rating.

← Back to Manage Evaluations Saved at 9:17:43 AM EDT ✓

Creating a Competency Evaluation

Status: Draft

PROPERTIES TEMPLATE **CONTENT** EVALUATORS REVIEW & PUBLISH

Domain: Create a Competency Evaluation 30 / 1000

Topic: Navigation

Topic: Properties

Competency Statement: Add a Title 11 / 1000

- Add New Competency Statement
- Add New Skill/Task
- Delete
- Include N/A As A Rating Option**

Evaluators

Any user with the Evaluation Interaction role will be available on the Evaluators page for assignment to your evaluation. Only those with the Evaluation Interaction role will be able to conduct evaluations.

Please Note: Competency Evaluations can have multiple evaluators rating in the same evaluation assignment. There may be times which one evaluator is qualified to rate a Learner on only a portion of the points of care covered in an evaluation. Thus, multiple evaluators can be used to rate one Learner within the same evaluation. For more information, please check out our [article on the Evaluation Interaction role](#).

You can use the Search bar on this page to find evaluators by name or any column on the evaluator list. For example, searching by "Shift Supervisor" will filter just evaluators with the Shift Supervisor job title.

← Back to Manage Evaluations Saved at 9:47:49 AM EDT

Creating a Competency Evaluation

Status: Draft

PROPERTIES TEMPLATE CONTENT **EVALUATORS** REVIEW & PUBLISH

SHOW ACTIONS

Available Assigned

Evaluators Available For Assignment:

<input type="checkbox"/>	Name and Username	Location	Departments	Job Titles	Hierarchy
<input type="checkbox"/>	Bailey, Jeremy <i>JBailey</i>	Essex Facility	Memory Care	Shift Supervisor	MC_Day Shift_Jeremy Bailey
<input type="checkbox"/>	Ford, Henrietta <i>Heford</i>	Essex Facility		Shift Supervisor	Specialties_Henrietta Ford
<input type="checkbox"/>	Manning, David <i>DManning</i>	Essex Facility	Independent Living	Shift Supervisor	IL_Day Shift_David Manning
<input type="checkbox"/>	Olso, Helga <i>HOlso</i>	Essex Facility	Independent Living	Shift Supervisor	IL_Night Shift_Helga Olso
<input type="checkbox"/>	Wyncroft, Matt <i>MWyncroft</i>	Rainbow Facility	Management	Shift Supervisor	Specialties_Matt Wyncroft

Items per page: 10 1 - 5 of 5 < >

To assign one or more evaluators, click the checkbox to select individuals and click Assign. The Assign button will become available as soon as you select an evaluator.

← Back to Manage Evaluations Saved at 9:47:49 AM EDT

Creating a Competency Evaluation

Status: Draft

PROPERTIES TEMPLATE CONTENT **EVALUATORS** REVIEW & PUBLISH

Actions

Selected: 3 out of 14

Available Assigned

Assign

Evaluators Available For Assignment:

<input type="checkbox"/>	Name and Username	Location	Departments	Job Titles	Hierarchy
<input checked="" type="checkbox"/>	Bailey, Jeremy <i>JBailey</i>	Essex Facility	Memory Care	Shift Supervisor	MC_Day Shift_Jeremy Bailey
<input type="checkbox"/>	Ford, Henrietta <i>Heford</i>	Essex Facility		Shift Supervisor	Specialties_Henrietta Ford
<input checked="" type="checkbox"/>	Manning, David <i>DManning</i>	Essex Facility	Independent Living	Shift Supervisor	IL_Day Shift_David Manning
<input type="checkbox"/>	Olso, Helga <i>HOlso</i>	Essex Facility	Independent Living	Shift Supervisor	IL_Night Shift_Helga Olso
<input checked="" type="checkbox"/>	Wyncroft, Matt <i>MWyncroft</i>	Rainbow Facility	Management	Shift Supervisor	Specialties_Matt Wyncroft

Items per page: 10 1 - 5 of 5 < >

Once you assign an evaluator, they will be removed from the Available list and added to the Assigned list. Evaluators can be removed from the Assigned list by selecting

them and clicking Unassign.

← Back to Manage Evaluations Saved at 9:52:08 AM EDT

Creating a Competency Evaluation

Status: Draft

PROPERTIES TEMPLATE CONTENT **EVALUATORS** REVIEW & PUBLISH

Actions

Selected: 0 out of 3

Unassign

HIDE ACTIONS

Available Assigned (3)

Evaluators Assigned:

<input type="checkbox"/>	Name and Username	Location	Departments	Job Titles	Hierarchy
<input type="checkbox"/>	Bailey, Jeremy <i>JBailey</i>	Essex Facility	Memory Care	Shift Supervisor	MC_Day Shift_Jeremy Bailey
<input type="checkbox"/>	Manning, David <i>DManning</i>	Essex Facility	Independent Living	Shift Supervisor	IL_Day Shift_David Manning
<input type="checkbox"/>	Wyncroft, Matt <i>MWyncroft</i>	Rainbow Facility	Management	Shift Supervisor	Specialties_Matt Wyncroft

Items per page: 10 1 - 3 of 3 |< < > >|

The evaluators have been assigned.

Online

Review & Publish

Preview what your evaluation will look like on the Review & Publish tab.

← Back to Manage Evaluations

Creating a Competency Evaluation

Status: Draft

PROPERTIES TEMPLATE CONTENT EVALUATORS **REVIEW & PUBLISH**

Preview:

Domain 1: Verification Checks Before Creation

Domain 2: Create a Competency Evaluation

Topic A: Navigation

Topic B: Properties

Competency Statement 1: Add a Title

Verification Method Rating

Skill/Task a: The Title chosen is unique

Skill/Task b: The Title does not contain spelling errors

At the bottom of this page you can Delete an evaluation as long as it is not Published.

Any evaluation can be cloned with the Clone option. Using Clone will create a new evaluation with the same template, content, and evaluators. We recommend using this feature for any published evaluation you wish to edit, including those authored by Relias.

When you are ready for Learners to be assigned to your evaluation, click Publish. Your evaluation is now available for assignment under Manage Enrollments.

← Back to Manage Evaluations

Creating a Competency Evaluation

Status: Draft

PROPERTIES TEMPLATE CONTENT EVALUATORS REVIEW & PUBLISH

Topic B: Properties

Competency Statement 1: Add a Title

Verification Method Rating

Competency Statement 2: Add a Description

Verification Method Rating

Comments (optional)

Enter comments related to this Topic

0 / 100

Delete Clone Publish

Please Note: The Publish button will not be available if there are any missing competency statements under the Content section.

Manage Enrollments

You will be able to manage Learner enrollments and evaluator assignments under Manage Enrollments. Click on the number of Current Enrollments to manage Learners currently enrolled and click on the number of Assigned Evaluators to manage evaluators assigned to an evaluation.

Only published evaluations will be available for enrollment. Any evaluations that are in Draft or Archived status will not show in this list.

To enroll Learners into an evaluation, click the button under Enroll Learners for the evaluation you want to assign.

Title	Enroll Learners	Current Enrollments	Assigned Evaluators
Creating a Competency Evaluation		2	2
Disable Clone Test - NY DSP Competency Checklist <i>Relias</i>		4	2
NY DSP Competency Checklist <i>Relias</i>		0	1
Regression check N/A <i>Relias</i>		0	1
Short Happy Path (RLPD-45181) <i>Relias</i>		0	1

Items per page: 10 | 1 - 5 of 5 | < > >>

Please Note: Only those with the Evaluation Enrollment role will be able to access Manage Enrollments.

Enrolling Learners

After clicking the Enroll Learners button on the Manage Enrollments tab, you will be brought to a list of Learners available for enrollment.

← Back to Manage Evaluation Enrollments

Creating a Competency Evaluation

ENROLL LEARNERS CURRENT ENROLLMENTS

⊙ SHOW FILTERS ⊙ SHOW COLUMNS ⊙ SHOW ACTIONS 🔍 Search

Learners Available For Enrollment:

<input type="checkbox"/>	Name and Username	Location	Department	Job Title	Hierarchy
<input type="checkbox"/>	Jones, Janis <i>MarketingAdmin</i>	Chapel Hill	Administration	Director of Marketing	Level A
<input type="checkbox"/>	Administrator, Relias <i>radmin</i>	Chapel Hill	Administration	Assistant Director	Relias Demo Site
<input type="checkbox"/>	Brittingham, Patty <i>patybrittingham</i>		Finance	Financial Analyst, RN	Level C
<input type="checkbox"/>	Andrews, Amy <i>amyandrews</i>	Chapel Hill	Client Care, Recovery Education Services	Counselor	Level C
<input type="checkbox"/>	Andorfer, Suzette <i>suzetteandorfer</i>		Mental Health	Counselor	Level B
<input type="checkbox"/>	Bedick, Jeff <i>jeffbedick</i>		Administration	COO	Client Care
<input type="checkbox"/>	Clark, Gregg <i>greggclark</i>		Administration	Facilities Manager	Level C
<input type="checkbox"/>	Baker, Anna <i>abaker</i>	Chapel Hill	HR	Counselor	Level B

The Search bar on the Enroll Learners and Current Enrollments pages will help you find Learners by name or any value in included columns. For example, if you want to see a list of Learners with the Case Manager job title, you can search for “Case Manager” as shown in the image below.

← Back to Manage Evaluation Enrollments

Creating a Competency Evaluation

ENROLL LEARNERS CURRENT ENROLLMENTS

SHOW FILTERS SHOW COLUMNS SHOW ACTIONS

Q Case Manager ✖

Learners Available For Enrollment:

<input type="checkbox"/>	Name and Username	Location	Department	Job Title	Hierarchy
<input type="checkbox"/>	Conklin, Janice <i>janiceconklin</i>		Psychiatric Services	Case Manager	Level C
<input type="checkbox"/>	Hampton, Kaya <i>kayahampton</i>		Psychiatric Services	Case Manager	Level B
<input type="checkbox"/>	Luke, Shannon <i>shannonluke</i>		Psychiatric Services	Case Manager	Level B
<input type="checkbox"/>	Tollen, George <i>georgetollen</i>		Psychiatric Services	Case Manager	Level A
<input type="checkbox"/>	Rabbit, Roger <i>rrabbit</i>			Case Manager	Level A
<input type="checkbox"/>	Johnson, Sarah <i>sjone@testsite.org</i>		Client Care	Case Manager	Level 1A
<input type="checkbox"/>	Faulk, London <i>londonf@testsite.org</i>			Case Manager	Level B

Items per page: 10 1 - 7 of 7 |< < > >|

More columns can be added to the Enroll Learners tab for viewing and searching. Click Show Columns and click the slider next to a field to add it. Click and drag on the double lines to rearrange the order of columns.

← Back to Manage Evaluation Enrollments

Creating a Competency Evaluation

ENROLL LEARNERS CURRENT ENROLLMENTS

Columns

- Name and Username
- Location
- Department
- Job Title
- Hierarchy
- Hire Date
- Employment Types
- User Categories
- Custom Field 1
- Custom Field 2

Reset Columns

SHOW FILTERS **HIDE COLUMNS** SHOW ACTIONS Search

Learners Available For Enrollment:

<input type="checkbox"/>	Name and Username	Location	Department	Job Title	Hierarchy
<input type="checkbox"/>	Jones, Janis <i>MarketingAdmin</i>	Chapel Hill	Administration	Director of Marketing	Level A
<input type="checkbox"/>	Administrator, Relias <i>radmin</i>	Chapel Hill	Administration	Assistant Director	Relias Demo Site
<input type="checkbox"/>	Brittingham, Patty <i>pattybrittingham</i>		Finance	Financial Analyst, RN	Level C
<input type="checkbox"/>	Andrews, Amy <i>amyandrews</i>	Chapel Hill	Client Care, Recovery Education Services	Counselor	Level C
<input type="checkbox"/>	Andorfer, Suzette <i>suzetteandorfer</i>		Mental Health	Counselor	Level B
<input type="checkbox"/>	Bedick, Jeff <i>jeffbedick</i>		Administration	COO	Client Care
<input type="checkbox"/>	Clark, Gregg <i>greggclark</i>		Administration	Facilities Manager	Level C
<input type="checkbox"/>	Baker, Anna <i>abaker</i>	Chapel Hill	HR	Counselor	Level B
<input type="checkbox"/>	Bullard, Matt <i>mbullard12345</i>	Chapel Hill	Administration	Nurse	Level C
<input type="checkbox"/>	Carter, Jodi <i>jodicarter</i>		Administration	Assistant Director	Level C

Items per page: 10 1 - 10 of 95 |< < > >|

Filter options are also available to help you find Learners to enroll. Click Show Filters to open a list of profile fields you can filter by.

← Back to Manage Evaluation Enrollments

Creating a Competency Evaluation

ENROLL LEARNERS CURRENT ENROLLMENTS

Filters

Location ▾

Department 1 ^

Filter by:
Administration

Add filter...

Job Title ▾

Hierarchy ▾

Hire Date ▾

Employment Types ▾

User Categories ▾

Custom Field 1 ▾

Custom Field 2 ▾

Reset Filters

HIDE FILTERS **SHOW COLUMNS** **SHOW ACTIONS**

Learners Available For Enrollment:

<input type="checkbox"/>	Name and Username	Location	Department	Job Title	Hierarchy
<input type="checkbox"/>	Jones, Janis <i>MarketingAdmin</i>	Chapel Hill	Administration	Director of Marketing	Level A
<input type="checkbox"/>	Administrator, Relias <i>radmin</i>	Chapel Hill	Administration	Assistant Director	Relias Demo Site
<input type="checkbox"/>	Bedick, Jeff <i>jeffbedick</i>		Administration	COO	Client Care
<input type="checkbox"/>	Clark, Gregg <i>greggclark</i>		Administration	Facilities Manager	Level C
<input type="checkbox"/>	Bullard, Matt <i>mbullard12345</i>	Chapel Hill	Administration	Nurse	Level C
<input type="checkbox"/>	Carter, Jodi <i>jodicarter</i>		Administration	Assistant Director	Level C
<input type="checkbox"/>	Coykendal, Luis <i>luiscoykendal</i>		Administration		Level 1A
<input type="checkbox"/>	Everheart, Jakob <i>jeverheart</i>		Administration, Compliance	Compliance Officer	Level B
<input type="checkbox"/>	Handler, John <i>johnhandler</i>		Administration	Systems Admin	Client Care
<input type="checkbox"/>	Levine, Becka <i>beckalevine</i>		Administration	Director of Marketing	Level B

Items per page: 10 1 - 10 of 16 < > >>

To assign one or more Learners, click the checkbox to select them, add a Due Date, and click Enroll. The Availability Date can also be modified before enrollment. Once a Learner is enrolled, they are removed from the Enroll Learners tab and added to the Current Enrollments tab.

← Back to Manage Evaluation Enrollments

Creating a Competency Evaluation

ENROLL LEARNERS CURRENT ENROLLMENTS

Actions

Selected: 2 out of 95

Availability Date:

9/20/2022

Due Date:

10/14/2022

Enroll

SHOW FILTERS SHOW COLUMNS HIDE ACTIONS Search

Learners Available For Enrollment:

<input type="checkbox"/>	Name and Username	Location	Department	Job Title
<input type="checkbox"/>	Jones, Janis <i>MarketingAdmin</i>	Chapel Hill	Administration	Director of Marketi
<input checked="" type="checkbox"/>	Administrator, Relias <i>radmin</i>	Chapel Hill	Administration	Assistant Director
<input type="checkbox"/>	Brittingham, Patty <i>pattybrittingham</i>		Finance	Financial Analyst, F
<input checked="" type="checkbox"/>	Andrews, Amy <i>amyandrews</i>	Chapel Hill	Client Care, Recovery Education Services	Counselor
<input type="checkbox"/>	Andorfer, Suzette <i>suzetteandorfer</i>		Mental Health	Counselor
<input type="checkbox"/>	Bedick, Jeff <i>jeffbedick</i>		Administration	COO
<input type="checkbox"/>	Clark, Gregg <i>greggclark</i>		Administration	Facilities Manager
<input type="checkbox"/>	Baker, Anna <i>abaker</i>	Chapel Hill	HR	Counselor

To unenroll one or more Learners, select them on the Current Enrollments tab, then click Unenroll.

← Back to Manage Evaluation Enrollments

Creating a Competency Evaluation

ENROLL LEARNERS CURRENT ENROLLMENTS

Actions

Selected: 1 out of 2

Unenroll

HIDE ACTIONS Search

Learners Currently Enrolled:

<input type="checkbox"/>	Name and Username	Availability Date (EDT)	Due Date (EDT)	Last Modified (EDT)	% Complete
<input type="checkbox"/>	Administrator, Relias <i>radmin</i>	Sep 20, 2022, 11:06 AM	Oct 14, 2022, 11:59 PM		<div style="width: 0%; height: 10px; background-color: #ccc;"></div> 0%
<input checked="" type="checkbox"/>	Andrews, Amy <i>amyandrews</i>	Sep 20, 2022, 11:06 AM	Oct 14, 2022, 11:59 PM		<div style="width: 0%; height: 10px; background-color: #ccc;"></div> 0%

Items per page: 10 1 - 2 of 2 |< < > >|

Viewing Completed Evaluations

After Learners and evaluators are assigned an evaluation, evaluators will now be able to complete the evaluation with the Learner. To learn more about conducting evaluations and Learner completion, please check out our other articles: [Competency Evaluations – Conducting Evaluations](#), and [Competency Evaluations – Learner Attestation](#).

Completed evaluations can be viewed in the Learner Blue Book. From the User List, click on the blue book icon next to the Learner's name, and you will be brought to the Learner Blue Book. Click on the checklist icon below the evaluation's title from the Transcript list to open the evaluation results.

• Back to User List

Michael Cowell's Training

TRANSCRIPT ASSIGNMENT DETAILS LICENSE/CERTIFICATION ATTENDANCE RECORD

TRANSCRIPT EDIT USER ADD EXTERNAL COURSE EXPORT PRINT TRANSCRIPT

Filter By All Types Show All Trainings Completed on R... All Certificates BrainSparks Op... + Filters x Clear

Specify Dates... Apply Clear

Learners marked complete for any accredited course will not receive the accreditation.

Delete Restore Deleted Change Due Date Mark as Complete 1-8 of 8

	Title	Type	Grade	Last Access	Available	Due Date	Completed	BrainSparks
<input type="checkbox"/>	A Day in the Life of Henry: A Dementia Experience REL-ALL-0-DLHDE 0.25 hours	Course				9/30/2022		
<input type="checkbox"/>	A First Look Into Integrated Care for Primary Care Staff REL-PI-0-FLICPCS 1.25 hours	Course				11/30/2022		
<input type="checkbox"/>	A Quick Guide to Preparing Professional Presentations REL-ACU-0-CE183-60 1 hour	Course				11/30/2022		
<input type="checkbox"/>	ABA in Schools: Ethics and Supervision REL-ABA-0-ADVWEB8 1 hour	Course	100%			4/30/2021	4/22/2021	
<input checked="" type="checkbox"/>	Creating a Competency Evaluation	Competency Evaluation	N/A			9/30/2022	9/20/2022	
<input type="checkbox"/>	Effective Reinforcement REL-ABA-0-POTG4 0 hours	Pro-on-the-Go				12/16/2022		

An overview of the evaluation will show you rating totals and the average score. Depending on the rating scale used, the maximum average score will be one or two. Navigate through the full evaluation and any comments left by the evaluator by clicking on the levels to expand or collapse them. At the bottom of the evaluation, you will find Employee Comments, Narration (if included in the evaluation), and Evaluator

Attestation.

← Back to Michael Cowell's Training

Creating a Competency Evaluation

[Cowell, Michael](#) | michaelcowell

Availability Date: Sep 20, 2022, 4:02 PM Due Date: Sep 30, 2022, 11:59 PM Completed Date: Sep 20, 2022, 5:14 PM

15 Met	0 Not Met	1.00 Total Average Score
------------------	---------------------	------------------------------------

Domain 1: Verification Checks Before Creation Average Score: 1.00 ^

Topic A: Role Verification Average Score: 1.00 ^

Competency Statement 1: Explains the Evaluation Management role is required for Competency Evaluation creation.

Recorded By: Administrator, Relias
Recorded Date: Sep 20, 2022, 5:03 PM

Verification Method: Observation
Rating/Score: Met

Skill/Task a: Explains the Evaluation Management role is required for Competency Evaluation creation.

Comments:
No comments were provided by your evaluator(s).

Domain 2: Create a Competency Evaluation Average Score: 1.00 v

Narrative v

Employee Comments:
No comments were provided by the employee.

Evaluator Attestations

Administrator, Relias
radmin

Attestation Date & Time:
Sep 20, 2022 5:04 PM