

How to create a competence committee meeting

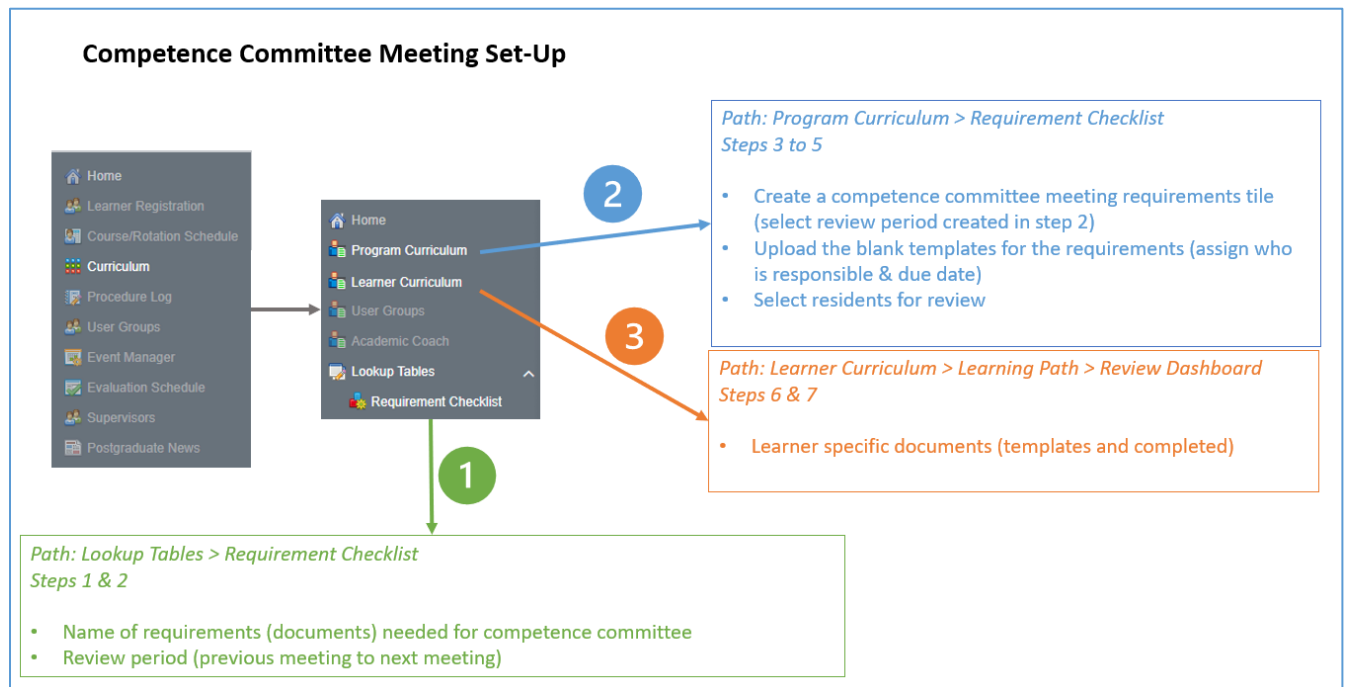
Audience: Program Admin, Program Director,
Competence Committee Chair

Vocabulary:

Requirement Checklist = Competence Committee Meeting Documents

Review Dashboard = Competence Committee Review Dashboard

Competence committee meetings are set up in 3 locations:



Summary of Steps (each step is detailed below – Must be done IN ORDER):

- Step 1 - Create requirement documentation names for your CC meeting in your Lookup table
- Step 2 - Create a Review Period for your CC meeting in your Lookup table
- Step 3 - Add a meeting tile to your Requirements tab in Program Curriculum (usually labeled by meeting date)
- Step 4 - Upload all relevant blank templates for your requirements, assign who is responsible to complete them and set due dates
- Step 5 - Select the residents who you wish to review at that meeting
- Step 6 – Check your residents’ review dashboard to verify that the meeting and requirements are appearing periodically prior to the meeting to see if needed elements have been uploaded
- Step 7 – Check your residents’ review dashboard periodically prior to the meeting to see if required documents have been uploaded
- Optional: view residents assigned to a meeting within the Reporting Module

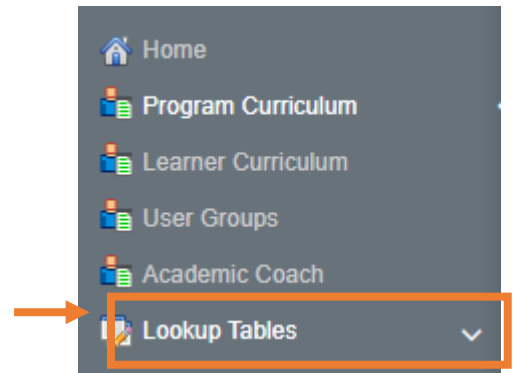
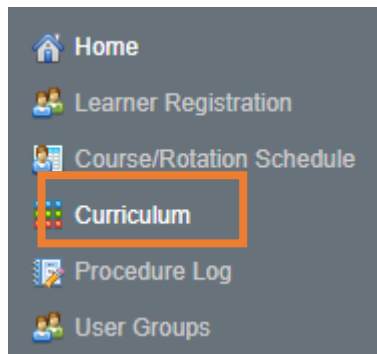
1] Create the list of requirement names (documents)



These are the documents your program uses to support the workflows of your competence committee (for example: learner self report, academic advisor report, feedback to resident etc.) Each program selects what documents they would like to use for their program. This step only needs to be done one time unless additional documents are needed in future.



Click on the **Curriculum** tile or menu. Select Lookup Tables, then Requirement Checklist.





Selena Bratest | Home > Curriculum > Lookup Tables > Requirement Checklist

Requirement | Review Period

Requirement Total: 8

Search: + Add New

Name	Program	Status
Academic Advisor/Coach Report	Emergency Medicine	Active
Competence Committee Feedback to Resident	Emergency Medicine	Active
Primary Reviewer Report	Emergency Medicine	Active
QI Project Supervisor Update	Emergency Medicine	Active
Resident Self Reflection	Emergency Medicine	Active
Scholarly Project Supervisor Update	Emergency Medicine	Active
Secondary Reviewer Report	Emergency Medicine	Active
Supplementary Information from Program Administrator	Emergency Medicine	Active

Showing 1 to 8 of 8 entries | Show 25 entries | First Previous 1 Next Last

1. Within the Requirement Tab: Click on **+Add New** to create a new requirement (document) name. These document names will be available for all your competence committee meetings in the future.
2. Add the requirement (document) name
3. Click on **Save**

Requirement | Review Period

Add Requirement

Name*: Active

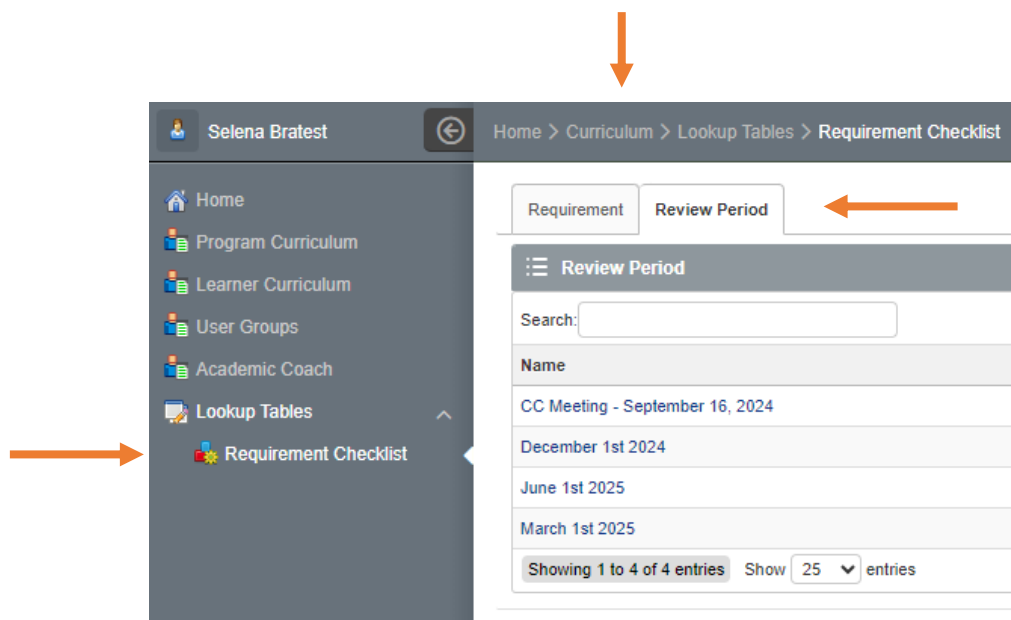
Program*:

Save Cancel

2] Create a Review Period for your CC meeting in your Lookup table



- Each program must indicate to the system a review period date range that will be linked to each CC meeting
- Generally, this is the date range between that last CC meeting and the next meeting
- Each Review Period has a Name and a Date Range (for the name – we recommend using the date range for simplicity/clarity)
- Within the **Curriculum** menu, select Lookup Tables, then Requirement Checklist.
- Select the Review Period Tab

Selena Bratest | Home > Curriculum > Lookup Tables > Requirement Checklist

Requirement | Review Period

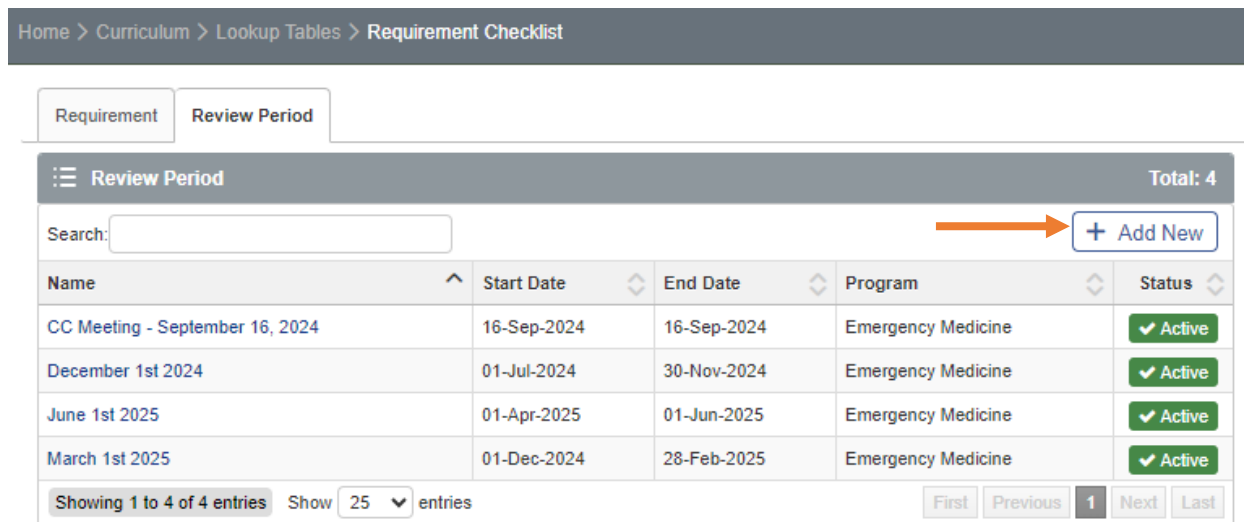
Review Period

Search:

Name
CC Meeting - September 16, 2024
December 1st 2024
June 1st 2025
March 1st 2025

Showing 1 to 4 of 4 entries | Show 25 entries

1. Click on **+Add New** to create a new review period



Home > Curriculum > Lookup Tables > Requirement Checklist

Requirement | Review Period

Review Period Total: 4

Search: [+ Add New](#)

Name	Start Date	End Date	Program	Status
CC Meeting - September 16, 2024	16-Sep-2024	16-Sep-2024	Emergency Medicine	Active
December 1st 2024	01-Jul-2024	30-Nov-2024	Emergency Medicine	Active
June 1st 2025	01-Apr-2025	01-Jun-2025	Emergency Medicine	Active
March 1st 2025	01-Dec-2024	28-Feb-2025	Emergency Medicine	Active

Showing 1 to 4 of 4 entries | Show 25 entries | First Previous 1 Next Last

2. Type a Review Period name into "Name" - we recommend just using the date of the upcoming CC Meeting (but you may use something else if it makes sense for your program)
3. Adjust the start and end date of the Review Period (we recommend using the date of the most recent CC meeting as the start date and date of the upcoming CC meeting as the end date)
4. Select the name of your program
5. Click **Save**



Home > Curriculum > Lookup Tables > Requirement Checklist

Requirement Review Period

Add Review Period

Name*: Active

Start Date*:

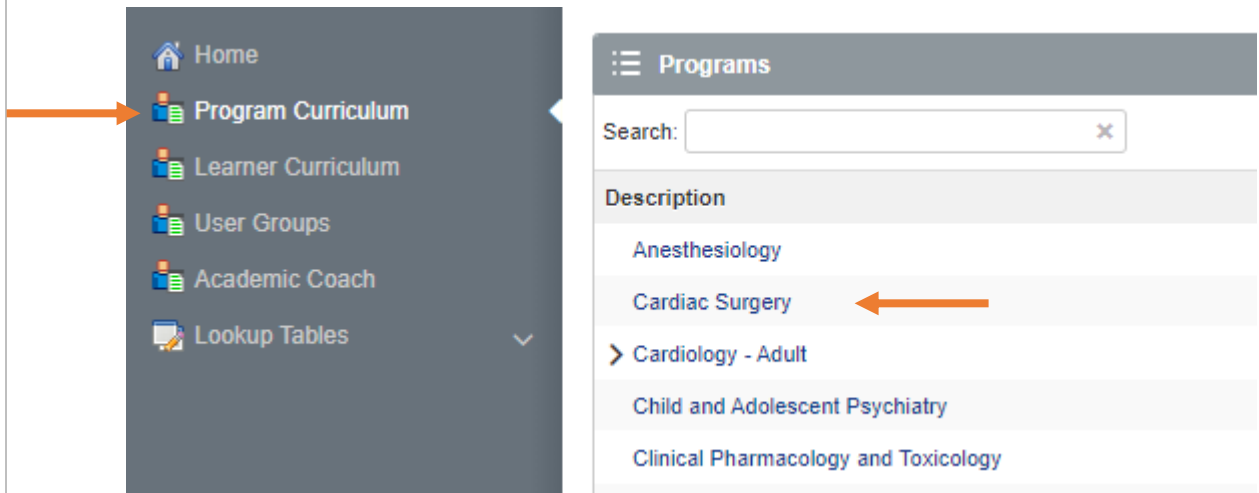
End Date*:

Program*:

3] Add a meeting tile to your Requirements tab in Program Curriculum



In the Curriculum Module, Click on Program Curriculum and select your program



Click the **Requirement Checklist** tab. Each tile represents a Competence Committee Meeting. Tiles are used to define which blank templates will be linked to the meeting and which residents will be reviewed. Only residents selected within the tile for review will have the blank templates available in their Review Dashboard tab. Each



tile contains a detailed view of the requirements, the person responsible for each requirement, uploaded template files, and due dates.



CREATE THE MEETING

1. Click on **+Add New Checklist**
2. Add your meeting name (we recommend the date of the meeting)
3. Sequence = tile order. Number 1 is the first on the top line
4. Select the period created on previous step
5. Click on save



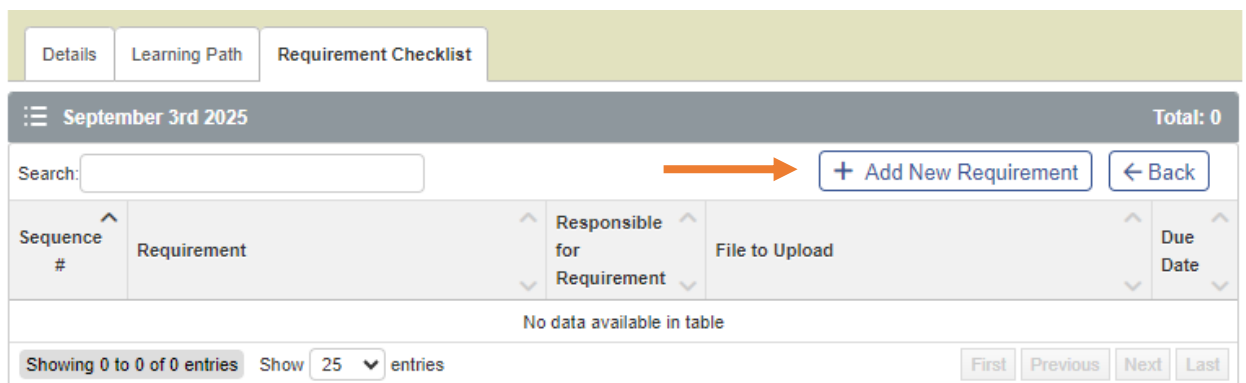
4] Upload all relevant BLANK templates for your requirements



1. Click on your meeting tile



2. Click +Add New Requirement



3. Select requirement name (populated from your Requirement Lookup Table (see step 2))
4. Indicate who is responsible for the requirement
5. Indicate a sequence # for the requirement (the order you wish for the requirement to appear)



6. Select a due date (optional)
7. Click in "Drop files or click to upload" box
8. Drop the appropriate blank template document into the upload box
9. Click on **Save**

Requirement
✕

Requirement*:

Responsible for Requirement*:

Sequence #*:

Due Date:

File to Upload:

Drop files or click to upload

Academic Advisor_Coach Report (U ... ✕

10. Repeat for each document

Emergency Medicine
Active

Department: Emergency Medicine

Training Level Type: Resident

Details
Learning Path
Requirement Checklist

☰ September 3rd 2025
Total: 8

Search:

Sequence #	Requirement	Responsible for Requirement	File to Upload	Due Date
1	Resident Self Reflection	Learner	Resident Self Reflection (U of C).docx	15-Aug-2025
2	Academic Advisor/Coach Report	Academic Coach	Academic Advisor_Coach Report (U of C).docx	15-Aug-2025
3	Supplementary Information from Program Administrator	Administrator	Supplementary Information from Program Administrator (U of C).docx	15-Aug-2025
4	Scholarly Project Supervisor Update	Administrator	Scholarly Project Supervisor Update (U of C).docx	15-Aug-2025
5	QI Project Supervisor Update	Administrator	QI Project Supervisor Update (U of C).docx	15-Aug-2025
6	Primary Reviewer Report	Competency Committee	Primary Reviewer Report (U of C).docx	15-Aug-2025
7	Secondary Reviewer Report	Competency Committee	Secondary Reviewer Report (U of C).docx	15-Aug-2025
8	Competence Committee Feedback to Resident	Competency Committee	Competence Committee Feedback to Resident (U of C).docx	15-Aug-2025

Showing 1 to 8 of 8 entries
Show entries

1



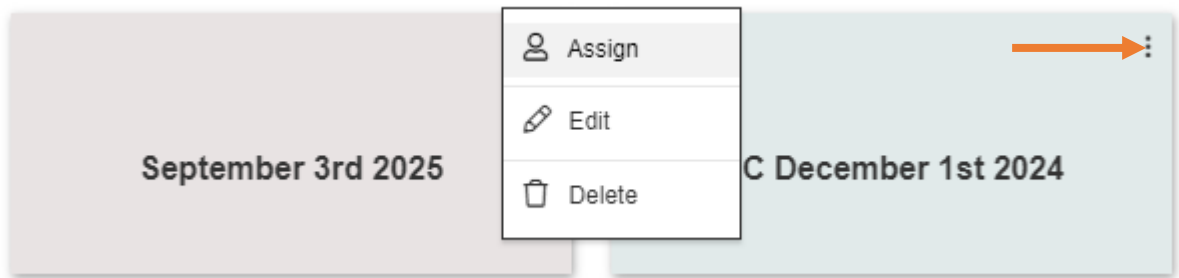
BEWARE: The files that are uploaded into the review dashboard are visible to anyone who has access to the learner's files (Use empty templates!):

- The learner
- PD/PA
- CC members
- Academic Coach

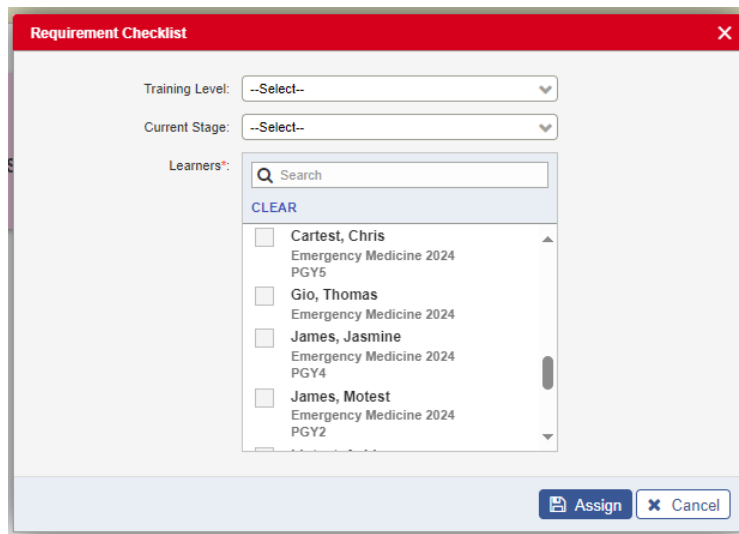
5] Select the residents to review during this meeting



1. Click on the **vertical 3 dots** of the tile to assign the learners to be reviewed

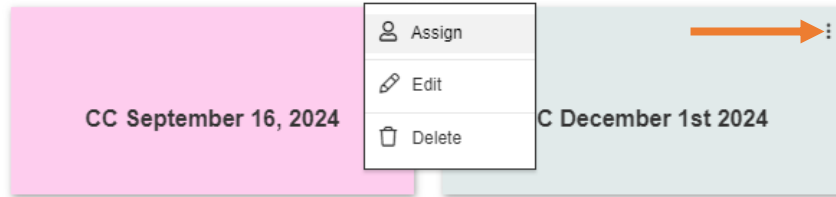


2. Select learners. Can filter by training level and stage. Only learners not yet assigned to this meeting will appear on the list.
3. Click on **Assign**





If needed, you may click on the **vertical 3 dots** and **Edit** to change the requirement/meeting tile name – for example, if the date of your meeting changes, you may change the name.



6] Check your residents' learner profiles to verify that you have set the meeting up correctly.



Go to a resident's learning path dashboard and open the Review Dashboard tab to be sure the meeting appears correctly. The documents should be listed.

Home > Curriculum > Learner Curriculum > Learner Dashboard

Emergency Medicine - Emergency Medicine 2024

Learner: James, Molest
Start Date: 01-Jul-2023
Current Stage: Stage 3 - Core of Discipline

Details | EPAs | Supporting Documentation | Reflection Documentation | Assessments | Program Evaluations | Events | Procedures | Summary Report | **Review Dashboard** | ← Back

+ Assign Checklist

September 3rd 2025, Period: September 3rd 2025 Total: 8

Search: + Add Requirement

Sequence #	Requirement	Responsible for Requirement	Template Files	Files	Due Date	Step Complete	Last Updated
1	Resident Self Reflection	Learner	Resident Self Reflection (U of C).docx		15-Aug-2025	<input type="checkbox"/>	
2	Academic Advisor/Coach Report	Academic Coach	Academic Advisor_Coach Report (U of C).docx		15-Aug-2025	<input type="checkbox"/>	
3	Supplementary Information from Program Administrator	Administrator	Supplementary Information from Program Administrator (U of C).docx		15-Aug-2025	<input type="checkbox"/>	
4	Scholarly Project Supervisor Update	Administrator	Scholarly Project Supervisor Update (U of C).docx		15-Aug-2025	<input type="checkbox"/>	
5	QI Project Supervisor Update	Administrator	QI Project Supervisor Update (U of C).docx		15-Aug-2025	<input type="checkbox"/>	
6	Primary Reviewer Report	Competency Committee	Primary Reviewer Report (U of C).docx		15-Aug-2025	<input type="checkbox"/>	
7	Secondary Reviewer Report	Competency Committee	Secondary Reviewer Report (U of C).docx		15-Aug-2025	<input type="checkbox"/>	
8	Competence Committee Feedback to Resident	Competency Committee	Competence Committee Feedback to Resident (U of C).docx		15-Aug-2025	<input type="checkbox"/>	

Showing 1 to 8 of 8 entries Show 25 entries First Previous 1 Next Last

Meeting Date:
 Date Decision Ratified:
 Overall Status: --Select--
 Purpose of Meeting: --Select--
 Outcome of Meeting: --Select--
 Promotion: --Select--



Troubleshooting: If the meeting is listed but none of the documents are appearing, it is because the resident was assigned to the meeting **before** the documents were added. (ie, steps not done in order) Stay on this dashboard, click on **Delete** at the bottom right of the meeting then click on **+Assign checklist** to re-upload the meeting.



Emergency Medicine - Emergency Medicine 2024

Learner: Thiestest, Brandon
Start Date: 01-Jul-2024
Current Stage: Stage 1 - Transition to Discipline

← Back

Details EPAs Supporting Documentation Reflection Documentation Assessments Program Evaluations Events Procedures Summary Report **Review Dashboard**

+ Assign Checklist

September 3rd 2025, Period: September 3rd 2025 Total: 0

Search: + Add Requirement

Sequence #	Requirement	Responsible for Requirement	Template Files	Files	Due Date	Step Complete	Last Updated
No data available in table							

Showing 0 to 0 of 0 entries Show 25 entries

Meeting Date:
Date Decision Ratified:
Overall Status: --Select--
Purpose of Meeting: --Select--
Outcome of Meeting: --Select--
Promotion: --Select--
Comments:

History Save Delete

7] Review status of requirement uploads as meeting approaches



Go to a resident's learning path dashboard and open the Review Dashboard tab to check on the status of required documents.

Home > Curriculum > Learner Curriculum > Learner Dashboard

Emergency Medicine - Emergency Medicine 2024

Learner: James, Motest
Start Date: 01-Jul-2023
Current Stage: Stage 3 - Core of Discipline

← Back

Details EPAs Supporting Documentation Reflection Documentation Assessments Program Evaluations Events Procedures Summary Report **Review Dashboard**

+ Assign Checklist

September 3rd 2025, Period: September 3rd 2025 Total: 8

Search: + Add Requirement

Sequence #	Requirement	Responsible for Requirement	Template Files	Files	Due Date	Step Complete	Last Updated
1	Resident Self Reflection	Learner	Resident Self Reflection (U of C).docx		15-Aug-2025	<input type="checkbox"/>	
2	Academic Advisor/Coach Report	Academic Coach	Academic Advisor_Coach Report (U of C).docx		15-Aug-2025	<input type="checkbox"/>	
3	Supplementary Information from Program Administrator	Administrator	Supplementary Information from Program Administrator (U of C).docx		15-Aug-2025	<input type="checkbox"/>	
4	Scholarly Project Supervisor Update	Administrator	Scholarly Project Supervisor Update (U of C).docx		15-Aug-2025	<input type="checkbox"/>	
5	QI Project Supervisor Update	Administrator	QI Project Supervisor Update (U of C).docx		15-Aug-2025	<input type="checkbox"/>	
6	Primary Reviewer Report	Competency Committee	Primary Reviewer Report (U of C).docx		15-Aug-2025	<input type="checkbox"/>	
7	Secondary Reviewer Report	Competency Committee	Secondary Reviewer Report (U of C).docx		15-Aug-2025	<input type="checkbox"/>	
8	Competence Committee Feedback to Resident	Competency Committee	Competence Committee Feedback to Resident (U of C).docx		15-Aug-2025	<input type="checkbox"/>	

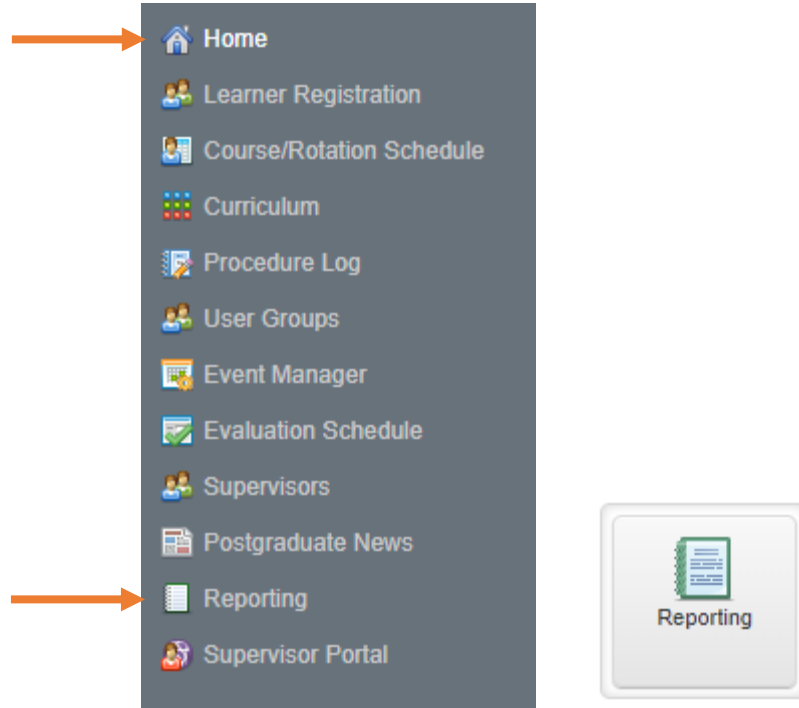
Showing 1 to 8 of 8 entries Show 25 entries

Meeting Date:
Date Decision Ratified:
Overall Status: --Select--
Purpose of Meeting: --Select--
Outcome of Meeting: --Select--
Promotion: --Select--

OPTIONAL - Review list of learners assigned to a meeting

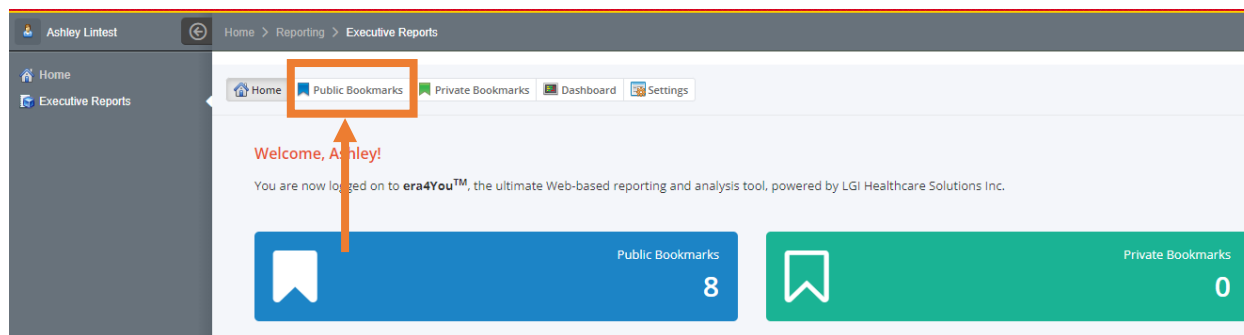
»»

Go back to Home and click on the Reporting menu or tile



»»

Click on **Public Bookmarks**





Click on **CBME Reviews** to see the list of learners assigned to each Competence Committee meeting

Home > Reporting > Executive Reports

Home Public Bookmarks Private Bookmarks Dashboard Settings

Public Bookmarks

Groups

- PG Maternal-Fetal Medicine
 - Academic Coaches
 - CBME Evaluation Scores
 - CBME Learning Path
 - CBME Reviews**
 - Competency Committee Members
 - CBME Evaluations

CBME Reviews Report
CBME Reviews

Home > Reporting > Executive Reports

Home Public Bookmarks Private Bookmarks Dashboard Settings

CBME Reviews

Report Print Preview

Save To Dashboard Delete Text Bars Pie Lines Hide / Show Nulls Null dim Totals Info

50 20 Pivot xy COUNT Series Format Design Mode Hierarchy Forecasting

CBME Program CBME Curriculum Learner Review Period Meeting Purpose Meeting Outcome Overall Status Learner Feedback Promotion Meeting Date Decision Ratified Date

Review Period Start Date Review Period End Date Stage Competency Committee

CBME Reviews				Export Details
# of Reviews			(none)	Learner Feedback
Maternal-Fetal Medicine	2024 Sep 10 - Dec 20 - CC Meeting	Maternal-Fetal Medicine CC	Coates, Jenna	0
			Acetest, Paul	0

CBME Program Checklist* Competency Committee Learner