Clinical Assessment System (CAS) – Preceptor Instructions

I. Introduction to the Clinical Assessment Process

1. The Clinical Assessment System (CAS) is the result of an active collaboration of education leaders from the University and Lerner College to develop an effective electronic infrastructure for the clinical curriculum. The program supports the following goals:
   - Improving learning – feedback and assessment that accomplishes this needs to be timely and specific. Through engaging faculty and students in reflecting on observed activities the CAS supports and encourages this important educational goal.
   - Encouraging professional growth and development through formative feedback while additionally accommodating the need for summative assessment (grading) in the University Program.
   - The LCME (Liaison Committee on Medical Education) requirement that medical schools 1) track student clinical experiences 2) document the specifics of their involvement and 3) track the relationship of those experiences to curricular goals. The CAS accomplishes these goals and goes a step further in incorporating formative feedback.
   - The LCME requirement that student assessment be consistent and standardized across all settings. The CAS has been specifically designed to address this goal and to support the needs of all disciplines at all sites.

2. The assessment process
   - Student send preceptors an e-mail with a link to log them in automatically when they click on the link OR
   - Periodically the system will generate e-mails to preceptors with links that will let them log in automatically OR
   - Preceptors can go to the URL (https://casemed.case.edu/CAS) and log in to do an assessment

3. Back up provisions
   - Paper versions of the assessment form will be supplied to each faculty. They will also be available from site coordinators.

4. Formative feedback (providing guidance that leads to improved performance) vs. Summative feedback (providing a judgment about performance that leads to a decision)
   - Feedback to be useful to the students must be descriptive and based on observed interactions. Avoid being judgmental, instead describe what you saw the student do that needed improvement or met expectations (see appendix for examples). After providing 2 descriptive or qualitative feedbacks to the student, you will be provided an opportunity to summarize

your feedback on a Likert scale and then modify this Cumulative form on each subsequent feedback.

5. Timely feedback
    - Since the feedback you provide to the student will be used by the discipline leaders to assess the students at mid and end of block, please provide this in a timely manner.

II. The Clinical Assessment System (CAS)

System Overview
- The CAS is a stand-alone system available on the WWW from any computer at https://casemed.case.edu/CAS
- You will need to register the first time you use the system.
- You determine the email address links and requests are sent to.
- You will regularly receive emails containing links to the system that, when clicked, will log you in to the system.
- You will receive students' assessment requests by email, or you may initiate assessment of a student by going directly to the system.

Start using the System…

One-time Registration

On your first visit to the CAS you will need to register for an account before logging in.

Registration is used to verify your information, provide preferred email address(es), and set up your username and password and a mechanism for you to retrieve these if you forget them. You may later update the information you provided during registration by clicking "Edit my profile" on your CAS homepage.

There are two ways to register:
1. If you have access to and remember your institutional email address (e.g. case.edu, ccf.org, med.va.gov, metrohealth.org, uhhs.com), you may self register.
2. If you do not have access to and remember your institutional email address, you will be asked to provide a way to verify your information

Note: You will see some security alerts on this site. It is OK to click yes and proceed. You can prevent these alerts by first visiting the following site http://casemed.case.edu/certificate/CaseMED_CA.htm (say OK to any prompts that come up). You have to do this only once.

Featuring Your CAS homepage

Clinical Assessment System
Wednesday, March 21, 2007

Neil Mehta, M.D.
Logout   Edit my Profile

Case School of Medicine | Cleveland Clinic Lerner College of Medicine

Students' requests for assessments you haven't fulfilled yet

Your formative assessment REQUESTS from students...   View request & assess

Received	Requested by	Request Type	Reminder	Status	
3/19/2007	Test Student	Patient Log	n/a		Assess
3/19/2007	Test Student	Procedure Log	n/a	cancelled	

Want to do an assessment that wasn't requested?   Start an Assessment

Complete a requested assessment or initiate an assessment

Your formative assessments IN PROGRESS...   Finish assessment

There are none yet...

Continue working on an assessment you've started

The last 10 assessments you've done

Your last 10 COMPLETED formative assessments...   Review assessment

Completed	Student Assessed	Type of Assessment	Requested?	
2/28/2007	Mahmoud Khair	Patient Log	2/28/2007	View
2/14/2007	Nawal Alkharouf	Patient Log	2/13/2007	View
11/15/2006	Ahmad Chaouki	Patient Log	11/15/2006	View

Can't find a completed assessment?   Search

Search for and review assessments you've already finished

Cumulative assessments you are still working on or have submitted

Your CUMULATIVE assessments...   Current block/rotation. Locked at the end of student's block/rotation.

Not Submitted

Received	Student	Assessment prompted by	Status	
2/28/2007	Mahmoud Khair	2+ Formative Assessments	In Progress	Resume
2/21/2007	Brian Antoniano	2+ Formative Assessments	In Progress	Resume
2/14/2007	Nawal Alkharouf	2+ Formative Assessments	In Progress	Resume

Submitted
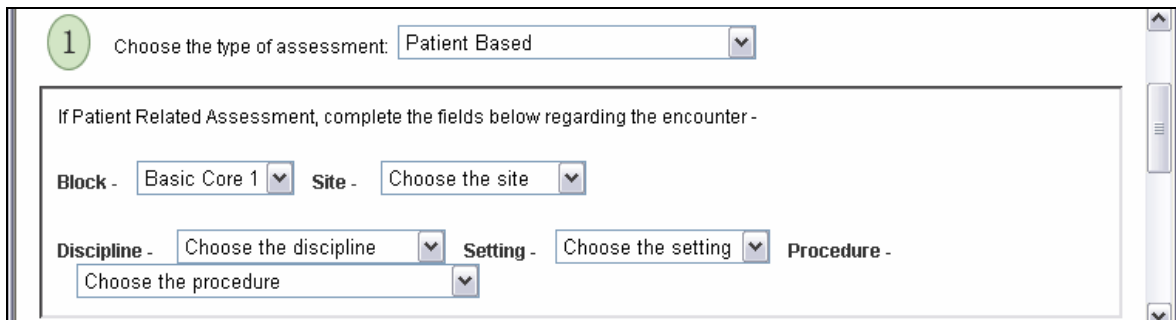
There are none yet...

Using the System to Assess Students

There are two ways to complete a formative assessment for a student:

Initiating the assessment:

1. Go to the CAS website directly (or clicking on the link emailed to you) and log in

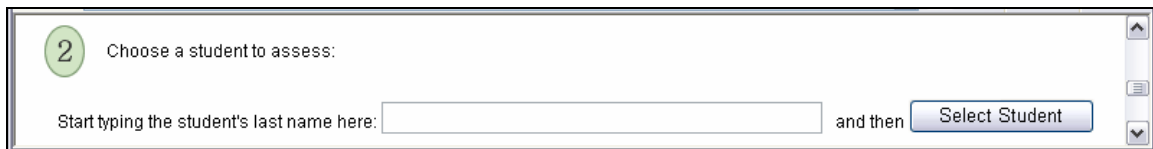2. Click on the link to Start an Assessment   Start an Assessment
3. Select the type of assessment form
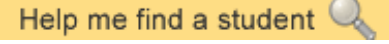
4. Enter the student name…

or search for a student by clicking   Help me find a student . Student photos are available here to assist you in choosing the student

5. Start the assessment   Begin Assessment

Fulfilling an assessment request:

1. Open and review the emailed request. The e-mail will contain a brief summary of the encounter that you precepted the student on, any specific (HIPAA compliant) comments from the student, and a link to the CAS.
2. Click on the link to the CAS website.
3. Your browser window will launch with an assessment form specific to the request (see below). Also on this page is a banner with a link to the related log, if applicable, the student's photo, links to any previous assessments you have completed for this student, and a summary of your outstanding assessment requests

Clinical Assessment System

Neil Mehta, M.D.

Logout Edit my Profile

Photo Not Available

Associated log/request: 3/19/2007
Patient Log
You are assessing: Test Student
Most recent assessment for this student: n/a

Clinical Assessment system status:
You have: 1 assessment requests (1 new, 0 >7 days old)

General Competency Based Assessment

Not ready to start this assessment?

✔ I'll do it later   ✖ No: Received request in error   ✖ No: Inappropriate/Other

Please complete the form. Click Save Draft to save your progress and Save Draft and Exit to save your progress and return later. Click Submit Final when you are finished and ready to submit your assessment. If you do not feel qualified or have insufficient evidence to assess a specific competency criterion, please leave the area blank.

View an Example

Competence	Targeted Areas for Improvement	Areas of Strength
Competency:Patient Care		
• Patient interviewing skills • History taking • Physical exam • Data retrieval • Developing DDx • Diagnostic plan • Treatment plan • Procedures		

Note: Students are now able to cancel assessment requests sent in error. A notification will appear on your homepage that the request was cancelled. You'll also be notified if you click on the original assessment link for a cancelled request. Remember, you can still assess the student with the "Start a New Assessment" feature.

A Single Assessment for Multiple Encounters

Students will have the option to group all encounters for a single day or a 7 day period into one request instead of sending a single request for each log.
This feature will mainly be used by students in Advanced Cores, AIs and electives.

What if I'm not ready or decide not to do the assessment?

At the top of the form are buttons that you can use to op-out of doing the assessment.

General Competency Based Assessment

Not ready to start this assessment?

✓ I'll do it later   ✗ No: Received request in error   ✗ No: Inappropriate/Other
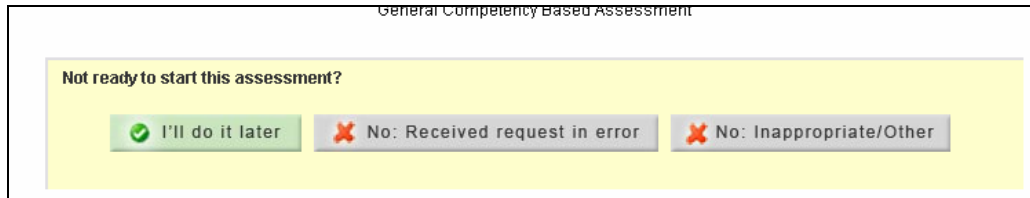
Indicate your decision not to fulfill an assessment request by clicking the appropriate button. The requesting student will be notified that the request will not be fulfilled.

If you don't opt-out, you will receive 2 automated email reminders that the assessment has not been completed. The system will send the first a week after the request was sent and the second a week later.
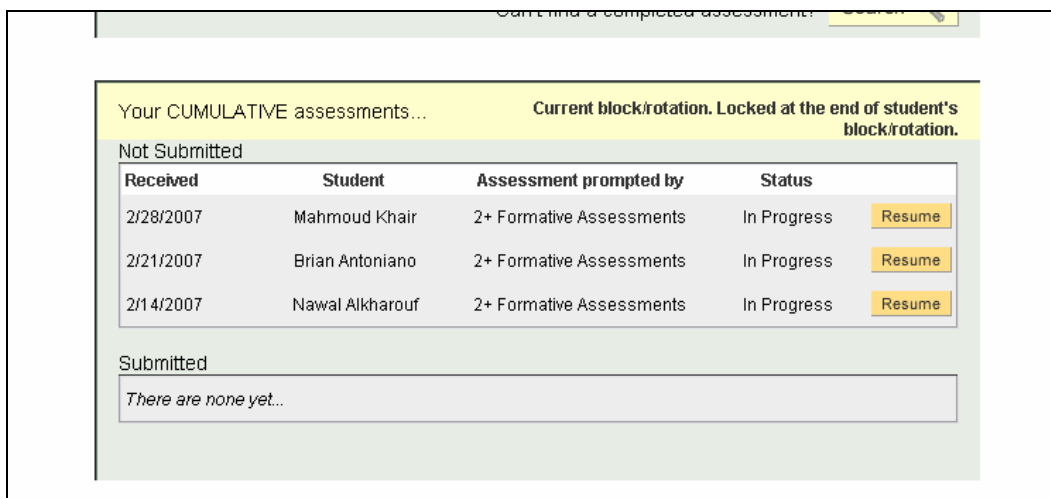
What about cumulative (scale) assessments?

Cumulative (scale) assessment forms will appear after you complete your 2nd formative assessment for a student and then after each subsequent assessment. You may also receive a Discipline Leader's request to complete a cumulative assessment.

The opt-out feature described above will also be available on the cumulative (scale) form, but even if you opt-out you will continue to have access to these forms from your homepage until the end of the block/rotation.

Go to "Your Cumulative Assessments" on your homepage to:
- Start and Resume Cumulative assessments you have not submitted
- Review and Edit forms you have submitted. Cumulative assessments are available to edit until the end of the block/rotation.

Can't find a completed assessment?   Search

Your CUMULATIVE assessments...   **Current block/rotation. Locked at the end of student's block/rotation.**

Not Submitted

Received	Student	Assessment prompted by	Status	
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Submitted

There are none yet...

III. Frequently Asked Questions

About the Clinical Assessment process:

Q: Do I need a computer to do the assessments?
A: Yes you need access to a web-enabled computer because the assessment process is completely web-based. By doing the assessments online (instead of on paper), the students get feedback sooner, the feedback is legible, the feedback can be viewed by physician advisers and discipline and block leaders and can be used in assessing the students overall performance. The online system also lets you view the student photograph and review your previous assessments for that student

Q: What if I need to fill out a paper assessment form?
A: You will find paper versions of the assessment forms with your site's administrator and teaching attendings and also at the back of this handbook.

Q: Do I need to fill out the entire competency-based form each time I assess a student?
A: No, while the form has multiple items organized by various competencies, you should comment about only what you have observed.

Q: Can my secretary fill out the form for me?
A: We are discouraging anyone filling out the assessment forms by Proxy. By filling out the forms yourself, you can ensure the accuracy of the data which is used to assess students overall performace on a particular block. Also by not sharing your log in information with anyone else, you can help ensure the privacy and security of student assessment data.

Q: What if I want to assess a student on an encounter they did not send an assessment request for?
A: You can always initiate an assessment by logging in to the CAS website, choosing the student and type of assessment, and completing the assessment form.

Q: What if I have trouble remembering an encounter when I later fill out an assessment form?
A: Use the pocket notebook provided to jot down notes to help you later fill out the online assessment form. As a further reminder, when you receive an assessment request it will include notes from the student reminding you of the encounter without including patient identifiers. You can also look up the encounter in Epicare and review the student's notes there.

About the Clinical Assessment System website:

Q: Will I have to remember the CAS website URL to do assessments?

A: Student requests will include links that will take you directly to the CAS and log you in. You will also receive an email every week that contains a link logging you in to the CAS.

Q: Do I need to do anything before I start my rotation and work with a student for the first time?
A: Once you start working with students, they will e-mail you links to assessment forms. Clicking on these links will automatically log you in to the system and take you to the appropriate assessment form. It is advisable to go to the site (https://casemed.case.edu/CAS) before working with students and register. This will help verify the information about you in the system and will provide the student an option of selecting your name from a drop down as opposed to typing it in. Also you can specify your preferred e-mail to receive the link to the assessment form.

Q: Why do I need to register to use the CAS website?
A: The need for security and privacy of the student assessment data requires us to collect registration information from those assessing students. We have tried to make this process as user friendly as possible. Registration also will provide the student an option of selecting your name from a drop down as opposed to typing it in. Also you can specify your preferred e-mail to receive the link to the assessment form.

Q: Can I access the CAS website from home?
A: Yes, the system is available on the WWW at (https://casemed.case.edu/CAS) without requiring log in to the Case or CCF networks.

Q: Can I use the CAS website on a Mac or browser besides IE?
A: We have tested the system for Windows XP running Internet Explorer, Opera and Firefox. We have also tested it for Macs running Safari, but the system does NOT work with Macs running IE.

IV. Need Help?

For assistance with your account information (ex: changing your block and site) or using the CAS (ex: completing assessment forms), contact your Site Administrator:
- CCF – Gwen Dove at doveg@ccf.org , 216-445-7439
- All other sites – Carol Chalkley at cab26@case.edu, 216-368-3783

For help with technical issues or to report problems with or suggest improvements to the CAS, contact the Technology Team at CollegeTech@ccf.org .

V. Credits
- Assessment model:
  Dan Wolpaw, Andrew Fishleder, Bud Isaacson, Elaine Dannefer, Terry Wolpaw, Dan Ornt, Alan Hull and Neil Mehta
- Technical team:
  Neil Mehta, Kristen Billings, Pavel Ermakov, Aakrati Mehta, Chris Deemer, Irene Medvedev
- Block and discipline leaders
- Case SOM Website and eCurriculum site
- CCLCM Website and Portal