

Clinical Assessment Process & System (CAS) – Students

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The Clinical Assessment Process

- During the Basic Cores I and II students will electronically record in the patient log component of the **Clinical Assessment System (CAS)** each patient encounter in which they have direct, significant involvement with the patient.
- **Student Expectations:** Students will request that the responsible supervising faculty or resident assess student performance in a subset of these encounters.
 - Students are expected to complete at least one patient log for each of the required diagnoses and presenting problems for each Basic Core and to request an assessment for the majority of these encounters.
 - General guidelines are at least 1 assessment request for each half day during outpatient-based activities with a maximum of 2 for each half day and minimum of 2-3 per week during inpatient-based activities with a maximum of 10/week.
 - Students must arrange for this assessment by electronically sending the request to the supervising faculty or resident.
 - Assessments must be sent to faculty within 3 days of the targeted activity
- These patient encounter logs and related assessments serve as the basis for student assessment during the Clinical Rotations.
- **On-line reports** are available in the CAS detailing the patient logs that each student has completed as well as the details about the number of assessments that have been requested and the number of assessments that have been completed.
 - Students should review this report frequently to be sure that a sufficient number of encounters, diagnoses and presenting problems, procedures, and assessments are being recorded.
 - If students have any questions and/or difficulty in completing encounter logs and receiving assessments, they should contact the Rotation Director as soon as possible.
- **Interval Formative Assessments**
 - During the Basic Cores every four weeks students will review their feedback and their progress in attaining block objectives and meet with the appropriate discipline leader(s) to discuss this experience and develop learning plans as indicated. During the advanced cores and other clinical rotations, this process should occur at mid-rotation (usually 2 weeks)
 - Each student's advisor (Society Dean for University students, Physician Advisor for CCLCM students) will have access to the results of these meetings and meet with the students as needed.
 - Students are encouraged to discuss their progress with their advisor
- **Composite End of Rotation Assessment**
 - A final report for each Discipline/rotation will be developed for each student. The final end of rotation report will include a summative assessment for each competency: "Exceeds expectations", "Meets expectations", "Meets expectations with concerns", "Does not meet expectations, remediation required" or "Failed". Please note that there is a separate process for assigning grades for the University Students in each discipline.

- For “Does not meet expectations, remediation required” a remediation plan will be created. This remediation plan must address all elements that did not meet standards for competency.
 - This report will be available to the student’s advisor. Students are encouraged to discuss this report with their advisor in order to address areas of weakness when planning clinical electives and other learning activities
- **Basic Core Performance Summative Assessment – Week 16**
 - Students will receive notification regarding Basic Core performance as to whether the degree of remediation outlined in the discipline remediation plans for the Basic Core warrants their needing to repeat the entire Basic Core.

The Clinical Assessment System (CAS)

System Overview: What will I use the CAS for?

- The CAS is a stand-alone system available on the WWW from any computer at <https://casemed.case.edu/CAS> . Use your Case ID to log in.
- You will use this system to:
 - Create logs and follow-up logs of meaningful patient encounters
 - Request patient-based and non-patient-based assessment from faculty and other assessors. The CAS will email your request. (Note: assessments must be requested within 3 days of the encounter/situation.)
 - Review received assessments
 - Track and review the kinds of patients you've seen and the assessment feedback you've received

Let's get started...

Logging In

You will find a link to the CAS on your Portal or you can go directly to <https://casemed.case.edu/CAS>. You will need to log in using your Case ID.

Clinical Assessment System Welcome to the Clinical Assessment System.

Tuesday, July 11, 2006

Case School of Medicine | Cleveland Clinic Lerner College of Medicine

Already have an account? *Note: This is not the same as your institutional account.*

Login: [Forget your login?](#)

Students: This is your Case user ID. (Ex: klm3)
Faculty/Assessors: This is the email address you designated for login during registration.

Password: [Forget your password?](#)

Faculty and Other Assessors- Need an account?

Do you remember and have access to your institutional email account?

Institutional email address: @ case.edu

Note: This email will be used for verification only. You will have the opportunity to provide an alternate email address during registration.

Don't remember or don't have access to your institutional email account?

Your primary email address:

The first time you log in, you'll need to click "Forget your password?" so that you can create your password. On the next page enter your Case email address (for CCLCM students too) and you'll receive a link to a page where you'll enter a password.

Featuring Your CAS homepage

**Login information,
Logout**

**Navigation: Home, Add a
Log, Request Assessment,
Search, Reports and Help**

Clinical Assessment System | Test Student | Logout
 Monday, March 19, 2007 | Basic Core 1, CCF and its FHCs
 Case School of Medicine | Cleveland Clinic Lerner College of Medicine | E-Portfolio

display 10 items

Logs

In Progress << 1 of 1 >>

Log	Encounter
Unknown	3/19/2007

Available for Assessment *encounters less than 3 days ago* << 1 of 1 >>

Log	Encounter
51-65 Non-Hispanic White Male with Cancer	3/19/2007
31-50 Asian or Pacific Islander Male with Anxiety	3/19/2007

Assessments

Inbox *assessments within last 30 days* << 1 of 1 >>

Assessment	Received
James: Patient Based Assessment	3/15/2007
James: Patient Based Assessment	3/15/2007
James: 5-12 American Indian or Alaskan Native Male with Rectal Pain/Bleeding	3/15/2007

Outbox << 1 of 1 >>

Assessment	Sent
Mehta: Bone Marrow: 51-65 Non-Hispanic White Male with Cancer	3/19/2007
Mehta: 51-65 Non-Hispanic White Male with Cancer	3/19/2007

Logs you're still working on

Change the # of items you see in each section below

Finished logs from encounters less than 3 days ago may be assessed

Assessments you've received in the last 30 days

Assessments you've requested but haven't yet received

The CAS Banner

The banner is available on most pages and will give you immediate access to the following options throughout the CAS:

Clinical Assessment System | Test Student | Logout
 Wednesday, July 12, 2006 | Basic Core 2, MetroHealth
 Case School of Medicine | Cleveland Clinic Lerner College of Medicine | E-Portfolio

Return Home (Home icon)

Create a New Log (Add Log icon)

Request non-log based Assessment (Request Assessment icon)

Search (Search icon)

Your Reports (Reports icon)

Help (Help icon)

Let's look at the tasks you'll be using the CAS to complete...

Creating a new log

After you've seen a patient you'll need to log the encounter. There are 2 buttons on the homepage that will take you to the Create New Log page:

Clinical Assessment System Test Student [Logout](#) Monday, March 19, 2007 Basic Core 1, CCF and its FHCs Case School of Medicine | Cleveland Clinic Lerner College of Medicine | E-Portfolio display 10 items

Logs

In Progress << 0 of 0 >>

Log	Encounter
-----	-----------

Available for Assessment encounters less than 3 days ago << 1 of 1 >>

Log	Encounter
31-50 Non-Hispanic White Male with Back pain	3/19/2007
13-17 Asian or Pacific Islander Male with Anemia	3/19/2007

Creating a patient/procedure log is a process with **5 important steps**, 4 of which are required for the log to be finished and Available for Assessment:

1. Describing the Encounter
2. Describing the Patient
3. Documenting Your Role in the encounter
4. Describing any Procedure(s) done (optional)
5. Recording your Preceptor(s)

We'll now look at each Step in depth...

Step 1, the Encounter

Clinical Assessment System Test Student Logout

Monday, March 19, 2007 Basic Core 1, CCF and its FHCs

Case School of Medicine | Cleveland Clinic Lerner College of Medicine | E-Portfolio

1 Encounter 2 Patient 3 My Role 4 Procedure 5 Preceptor

Patient Log: Part 1 I've seen this patient before

* Required Fields

1 Encounter date 3/19/2007 mm/dd/yyyy

*Block Basic Core 1

*Discipline Choose your discipline

*Site CCF and its FHCs

*Setting at site Choose your setting

2 Save & Proceed Save & Exit

1. Fill the **fields on this page**. They're all required (*), but defaults make it easier to fill out.

- Encounter Date: defaults to today's date (this date cannot be changed once this page is saved).
- Block: defaults to the current Block. If this encounter had occurred during a different Block, I could change the drop-down to that selection.
- Discipline: choose from the drop-down list.
 - At this point you can enter the Preceptor's Specialty if you know it. Leave it at the default if you're not sure. Entering the Preceptor's Specialty will help you in searching for an assessment you've received later on.
- Site: defaults to your current Site. If the patient had been seen at a Site other than I am assigned to, I could change the drop-down to that selection.

2. With the Encounter information complete, we'll move on by clicking **Save & Proceed**.

If we wanted to stop working and come back later, we'd click "Save & Exit."

- Ignore the "I've seen this patient before" button for now. We'll look at that button later when we create a follow-up log.

Step 2, the Patient

Clinical Assessment System Test Student [Logout](#) Tuesday, March 20, 2007 Basic Core 1, CCF and its FHCs Case School of Medicine | Cleveland Clinic Lerner College of Medicine | E-Portfolio

1 Encounter 2 Patient 3 My Role 4 Procedure 5 Preceptor

Patient Log: Part 2

* Required Fields

Patient Information

*Age

*Gender Male Female 1

*Race Black Asian or Pacific Islander Non-Hispanic White Hispanic American Indian or Alaskan Native Other

Symptoms and Diagnoses

*Select the Primary Symptom or Diagnosis

Select Secondary Symptom(s) or Diagnosis(es) also addressed at this encounter:

2

3

1. Fill the Required fields (*):

- Age
- Gender
- Race
- Primary Symptom or Diagnosis

Note: If "Other" is chosen as a Symptom/Diagnosis, you must type it in and select a Corresponding System.

2. Input any Secondary Symptom and Diagnosis by choosing a Symptom/Diagnosis and clicking "Add." To remove a Symptom/Diagnosis, choose it and click "Remove."

3. When you're finished, click Save & Proceed to continue.

Step 3, my Role

1. Complete applicable checkboxes describing your Role in this encounter.

The screenshot shows the 'Clinical Assessment System' interface. At the top, it displays 'Tuesday, March 20, 2007' and 'Test Student' with a 'Logout' link. Below this, it lists 'Basic Core 1, CCF and its FHCs' and navigation links for 'Case School of Medicine', 'Cleveland Clinic Lerner College of Medicine', and 'E-Portfolio'. A navigation bar contains five tabs: '1 Encounter', '2 Patient', '3 My Role' (which is selected), '4 Procedure', and '5 Preceptor'. Below the tabs, it says 'Patient Log: Part 3'. The 'My Role' section contains a table with the following structure:

SKILL	Performed/Discussed/Reviewed		
	Alone	With Faculty	With Housestaff
History Taking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Physical examination	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. Enter any comments you want to record regarding this encounter.

The screenshot shows the 'Comments' section. It features a large text area for entering comments. Below the text area, there are three bullet points providing instructions:

- Highlight learning issues and challenges rather than summarizing the case.
- Avoid patient identifiers.
- Comments will be visible to your preceptor if you choose to send the log for assessment.

3. Did you do a **Procedure** at this encounter? If so, check the box to move to the Procedure entry page. If the box is unchecked, you will skip the Procedure Step.

The screenshot shows a checkbox labeled 'Add procedure(s) for this encounter on the next page'. The checkbox is currently unchecked. Below the checkbox are two buttons: 'Save & Proceed' and 'Save & Exit'.

4. After making your choices, click “Save & Proceed” to move forward. We’ll check the box to Add a Procedure.

Step 4, Procedure

1. Select the Procedure(s) from the drop-down, using the “Add” and “Remove” buttons to manage multiple selections. *Note: You can delete all added Procedure(s) at once by clicking “Delete procedure(s)” at the top of the page.*

The screenshot shows a navigation bar with five tabs: 1 Encounter, 2 Patient, 3 My Role, 4 Procedure (active), and 5 Preceptor. Below the navigation bar, there is a section for 'Patient Log: Part 4 (Optional)' with a button that says 'No procedure at this encounter'. The main area is titled 'Procedure Log' and contains the instruction 'Select procedure(s) done at this encounter:'. A dropdown menu is set to 'Abdominal paracentesis', with 'Add >>' and '<< Remove' buttons. An empty text box is also present.

2. Each selection will add a row to the Role table. Record your Role in the procedure by checking the appropriate box.

The screenshot shows a table titled 'Your role during procedure(s):'. The table has five columns: 'Abdominal paracentesis', 'Observed housestaff or faculty', 'Did procedure with faculty/housestaff supervision', 'Did procedure alone', and 'Reviewed/discussed indications, complications with housestaff/faculty'. Each column has a checkbox in the row below it.

	Observed housestaff or faculty	Did procedure with faculty/housestaff supervision	Did procedure alone	Reviewed/discussed indications, complications with housestaff/faculty
Abdominal paracentesis	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3. Enter any Comments particular to the procedure portion of the encounter.

The screenshot shows a 'Comments:' section with a list of instructions: 'Highlight learning issues and challenges rather than summarizing the case.', 'Avoid patient identifiers.', and 'Comments will be visible to your preceptor if you choose to send the log for assessment.' Below the list is a text area with a scroll bar. At the bottom, there are two buttons: 'Save & Proceed' and 'Save & Exit'.

4. Click “Save & Proceed” to continue to the final step.

Step 5, Preceptor(s)

You must enter at least one Preceptor for every log. Only Preceptor(s) entered here will be available to send an assessment request.

The screenshot shows a navigation bar with five tabs: 1 Encounter, 2 Patient, 3 My Role, 4 Procedure, and 5 Preceptor. The 'Preceptor' tab is selected and highlighted in grey. Below the navigation bar, the text 'Patient Log: Part 5' is displayed. A yellow banner contains the message: 'Log is not yet Complete - At least one preceptor is required for each encounter.' To the right of this message is an 'Exit Log' button with a right-pointing arrow. Below the banner is a text input field with the label '*Preceptor(s) for this encounter'.

1. Start typing your Preceptor's last name in the text box.

The screenshot shows the 'Preceptor Information' form. It has three main sections: 'Start typing preceptor's last name here:' with a text input field; 'Role:' with a dropdown menu currently showing 'Faculty/Attending/Staff Physician'; and 'For:' with a dropdown menu currently showing 'Please select below...'. The form is set against a light grey background.

For example, typing Dr. Mehta's name reveals that he's in the system as a Preceptor. His name shows in the list of "M's" to be selected. If he hadn't shown up in the list, I could input his name, last name first.

The screenshot shows a dropdown list with the following names: Mehta, Neil; Mehta, Adi; Mehta, Aditi; Mehta, Atul; Mehta, Neil; and Mehta, Shilpi. The 'Mehta, Neil' entry is highlighted with a blue background.

2. Make sure the correct role is selected for this Preceptor and choose the portions of the encounter during which this person precepted you.

3. Save. The log is now finished, and the finished log and the Preceptor you've added are available for an assessment request.

You now have the following options: Delete or Edit the Preceptor you just entered, add another Preceptor, go directly to Request Assessment, or simply Exit to the homepage.

The screenshot shows a table titled 'Your Preceptor(s):'. The table has four columns: Name, Role, For, and Edit/Delete. The first row contains the following data: Name: Mehta, Neil; Role: Faculty/Attending/Staff Physician; For: Patient Encounter; Edit/Delete: [Edit](#) [Delete](#). Below the table is a yellow banner with the message: 'Log is Available for Assessment Request- Enter all preceptors for this encounter. Only preceptors entered here will be available for assessment request.' At the bottom of the banner are two buttons: 'Request Assessment(s)' with a document icon and 'Exit without Request' with a right-pointing arrow.

Creating a log for a Follow-up Patient

There are two ways to create a follow-up log. Use the workflow that works best for you.

First option:

1 Encounter 2 Patient 3 My Role 4 Procedure 5 Preceptor

Patient Log: Part 1

* Required Fields

1. Start a new log as usual but, instead of filling the fields on the first page, click “I’ve seen this patient before”

Close Window

Find and Select the Follow-up Patient

One of your last 10 patients?

- Select 50-65 Asian or Pacific Islander Female with Chest pain
- Select 5-12 years Asian or Pacific Islander Female with Emergent Clinical Problem
- Select 18-30 Non-Hispanic White Female with Anxiety
- Select Unknown
- Select 5-12 Hispanic Male with Substance Abuse
- Select 31-50 Asian or Pacific Islander Female with Substance Use
- Select 65-75 Hispanic Female with Chest pain
- Select 65-75 Non-Hispanic White Male with Headache
- Select 0-3 months Asian or Pacific Islander Female with Well Child

Find logs and log based assessments with:

Date - between mm/dd/yy and mm/dd/yy To search all dates or with no upper or lower limit leave blank or default value.

Patient - Race Any race Age Range Any age Gender Any gender

Primary Symptom or Diagnosis Any symptom or diagnosis

Procedure Any procedure

Encounter - Discipline Any discipline Setting Any setting

Preceptor - Name Any preceptor Specialty Any specialty

Only complete this section if you sent the Patient and/or Procedure Log for assessment.
If you sent the Patient and Procedure Logs to different preceptors the Patient Log preceptor will be shown first.

Search

Results Click the date to view the log or assessment if available.

2. We’ll help you find the follow-up patient so their information will pre-fill into your new log and this log will be tied to this patient.

Is the patient one of the last 10 you’ve seen?

- If so click “Select” next to that patient and the window will close and you’re ready to begin.
- If not, “Search” for the patient using the standard search fields to search the logs you’ve created...

Headache <input type="button" value="Select"/> 0-3 months Asian or Pacific Islander Female with Well Child Care: (infant 1-12 mon) <input type="button" value="Select"/> 5-12 Asian or Pacific Islander Female with Cancer		<input type="button" value="Search"/>				
Results Click the date to view the log or assessment if available. 4 logs for: Black, 50-65						
	Log	Gender	Primary Symptom/ Diagnosis	Procedure (s)	Discipline Setting	Preceptor
	<input type="button" value="Select"/> 7/5/2006 (Basic Core 2 at CCF and its FHCs)	Female	Menopause	None	OB/GYN Outpatient	Erk, Papka
	<input type="button" value="Select"/> 6/29/2006 (Basic Core 2 at CCF and its FHCs)	Female	Menopause	Breast exam Pap smear Rectal exam	OB/GYN Outpatient	McKenzie, Margaret

In the results you can choose the correct patient by clicking the select button. This will close the window and pre-fill the patient's information into your new log.

Second Option:

https://ectest.case.edu - Clinical Assessment System - Log Summary - Microsoft Internet Explorer

Clinical Assessment System

Log Summary
 Student: Test Student

Encounter
 Date: Monday, March 19, 2007 (Elective) Site: CCF and its FHCs Setting: Inpatient
 Discipline: Surgery

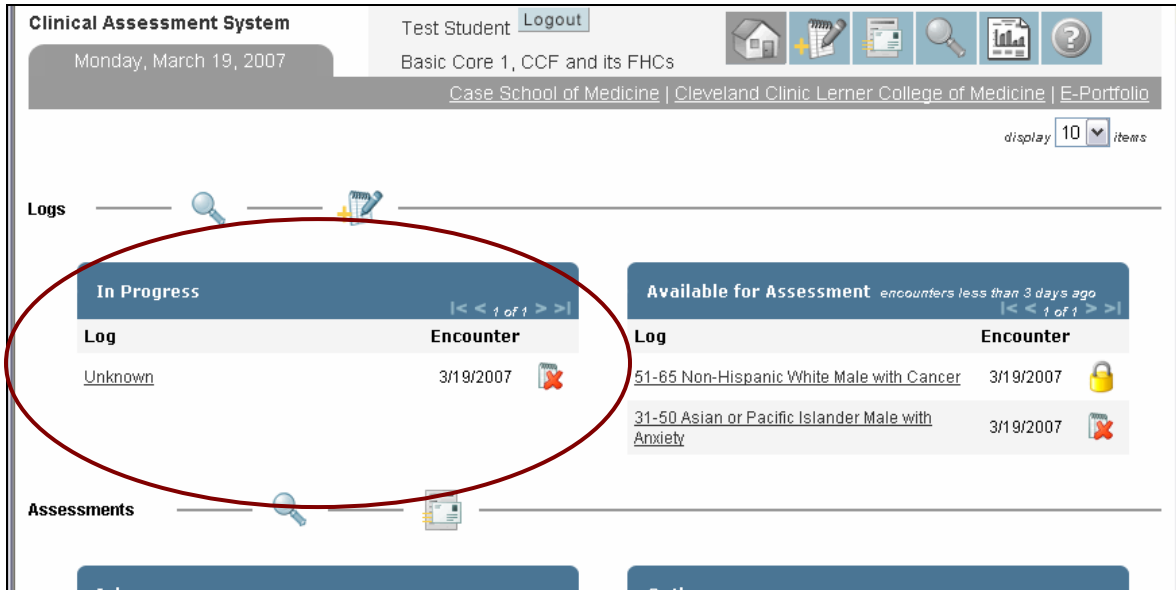
Patient
 Age: 51-65 Gender: Male Race: Non-Hispanic White
 Primary Symptom or Diagnosis: Cancer

If you've already searched for and opened a prior log for the follow-up patient, you can create your follow-up log by clicking "Create a follow-up log" at the top of the completed log.


Making Changes to a Saved Log



First, determine if the log is In Progress or finished...


Log is In Progress: If you've clicked "Save & Exit" while creating a log, or exited a log before completing all the steps, the log is In Progress and available on the homepage.



The screenshot shows the Clinical Assessment System interface. At the top, it displays the date "Monday, March 19, 2007" and the user "Test Student" with a "Logout" button. The course is identified as "Basic Core 1, CCF and its FHCs". The navigation bar includes "Case School of Medicine | Cleveland Clinic Lerner College of Medicine | E-Portfolio" and a "display 10 items" dropdown. The main content area is divided into "Logs" and "Assessments" sections. The "Logs" section is further divided into "In Progress" and "Available for Assessment". The "In Progress" table has one entry: "Unknown" with an encounter date of "3/19/2007" and a delete icon. The "Available for Assessment" table has two entries: "51-65 Non-Hispanic White Male with Cancer" and "31-50 Asian or Pacific Islander Male with Anxiety", both with encounter dates of "3/19/2007". The "In Progress" table is circled in red.

In Progress	
Log	Encounter
Unknown	3/19/2007 

Available for Assessment <small>encounters less than 3 days ago</small>	
Log	Encounter
51-65 Non-Hispanic White Male with Cancer	3/19/2007 
31-50 Asian or Pacific Islander Male with Anxiety	3/19/2007 

- Click on the log to resume work.
- You can delete logs that are In Progress with the delete icon. 

Log is finished: If you completed the final step of a log, the log will be either Available for Assessment, if it's within 3 days of the encounter, or it will be archived and accessible by searching. As long as you haven't sent an assessment request for the log, you will be able to open the log and edit it.


Request Assessment for a Patient and/or Procedure Log

There are 2 ways to get to the Assessment Request page:

- After entering your Preceptor(s) in step 5, click the “Request Assessment” button
- From the homepage, click on a log that’s “Available for Assessment”

Requesting a log-based assessment triggers an email to the Preceptor(s) you designate with a direct link to the necessary assessment form.

- You can request a single log be assessed by one or multiple Preceptors (as long as you’ve added those Preceptors in step 5 of your log)
- You can request a day or week’s worth of logs be assessed.
 - Students in the **Basic Cores** should still be getting feedback on individual encounters but will have the option to group patient logs for the same date and preceptor. Discuss this feature with your preceptor to see if he or she would like you to group logs. This "grouping" feature was designed for advanced rotations and should not be generally used for basic cores.
 - Students in Advanced Cores will be expected to utilize this feature to group their logs. Ask your preceptor whether you should group patient logs only for the same day or wait until the end of the week to request an assessment on all logs for that week. The 3 day deadline for logs available for assessment still applies. For example if you are grouping logs for a week, you need to send the request within 3 days of the last log for that week.
- You can request a Patient and/or Procedure assessment, but the Preceptor(s) must have been added for that portion of the encounter in step 5 of the log.
- All log-based assessment requests must be within 3 days of the log’s Encounter Date.

Note: Requesting an assessment means that Preceptor(s) will be reviewing your log(s), so your log(s) will be locked  and no longer editable.

1. Select an available Preceptor. If you do not see a desired Preceptor here, you may need to add him or her using the “Add/Edit Preceptor(s)” button or you may have already sent a request to that Preceptor.

Request Assessment from Preceptor(s) Exit without Assessment →

Select Preceptor(s) below from whom you would like to request assessment. To select a Preceptor who is not listed below, you must enter the additional Preceptor(s) for this log.

[← Add / Edit Preceptor\(s\)](#)

Hull, Alan - Faculty/Attending/Staff Physician

Jain, Anil - Faculty/Attending/Staff Physician

Mehta, Neil - Faculty/Attending/Staff Physician

2. Selecting a Preceptor displays the request form for that Preceptor. Make sure your desired Request Type is selected and the email address is correct. Type a note to the Preceptor, perhaps to remind him or her of this particular encounter, without including any patient identifiers. It's a good idea to double check the pre-filled email address. If you have been given a different email address for the preceptor, enter it in the text box.

Mehta, Neil - Faculty/Attending/Staff Physician

*Request type: Patient Encounter *To email address: mehtan@ccf.org

Combine this Request

Enter a note to the Preceptor about this request. You may want to include reminders of the encounter (ex: second patient of the day, distinguishing characteristics), but you should not include patient identifiers. Indicate if you already sent a written workup to the preceptor.

3. If you would like to group other patient logs with this request, click the button “Combine this Request” to open the grouping option:

Combine this Request

To combine with this Request, patient logs must be:

- Same Preceptor
- Complete and Available for Assessment

Select your Combined Request time frame:
 week day
includes logs from 4/19/2007

Your Combined Request will include these logs:

- [31-50 Asian or Pacific Islander Female with Weakness/Dizziness](#)
- [13-17 Non-Hispanic White Male with Headache](#)

You will need to choose whether you want to combine for a week or a day. Basic Core students will not have any option here – they can only group logs for a day. The logs that will be grouped are displayed on the right. If you do not want to group logs, simply click on the “Combine this Request” button again to close this feature.

4. Select and review any additional Preceptors for this request and click “Request Assessment(s)”. The request will show up in your Outbox to track. *Note: You will be able to make changes to your requests from the homepage. You will not be able to edit the log once a request is sent.*

Note: Once a Request for Assessment is sent, you are no longer able to edit this Log. [View a Summary of this Encounter](#)

Requesting an Assessment that's Not Patient Log-Based

You may want to request assessments that are not based on a specific patient encounter. There are 2 buttons on the homepage that will take you to the Request Assessment page:

Clinical Assessment System Test Student [Logout](#) Monday, March 19, 2007 Basic Core 1, CCF and its FHCs Case School of Medicine | Cleveland Clinic Lerner College of Medicine | E-Portfolio display 10 items

Logs

In Progress	
Log	Encounter
Unknown	3/19/2007

Available for Assessment <small>encounters less than 3 days ago</small>	
Log	Encounter
51-65 Non-Hispanic White Male with Cancer	3/19/2007
31-50 Asian or Pacific Islander Male with Anxiety	3/19/2007

Assessments

Inbox <small>assessments within last 30 days</small>	
Assessment	Received
James: Patient Based Assessment	3/15/2007

Outbox	
Assessment	Sent
Mehta: Bone Marrow: 51-65 Non-Hispanic White	3/19/2007

From the Request Assessment page:

1. Choose the Type of Assessment you would like. Block and Site will contain your defaults but may be changed. Choose the Discipline from the drop-down list.

Clinical Assessment System Test Student [Logout](#) Tuesday, March 20, 2007 Basic Core 1, CCF and its FHCs Case School of Medicine | Cleveland Clinic Lerner College of Medicine | E-Portfolio

Request Non-Log Based Assessment (To request a Log Based Assessment, return to the homepage and find a Log under "Available for Assessment.")

1. Select the type of assessment you are requesting:

*Assessment Type: Choose the assessment type

Block: Basic Core 1 Discipline: Choose the discipline Site: CCF and its FHCs

2. Fill in the recipient the same as an Assessment Request for a Log - start typing the Preceptor's last name in the box and choose the name from the drop-down. If the

Preceptor isn't in the list, type his or her name, last name first. Confirm his or her role. Enter any comments regarding this assessment request and click "Add Preceptor".

2. Enter Preceptor(s) below from whom you would like to request assessment:

*** Preceptor Information:** Start typing preceptor's last name below. If you do not see your Preceptor's name, type his or her full name (last name, first name).

Start typing preceptor's last name here:

Role:

Comments: Enter comments for this preceptor regarding this request.

3. Review your selected Preceptor(s). It's a good idea to double check the pre-filled email address. If you have been given a different email address for the preceptor, enter it in the text box.

Clinical Assessment System - Other Assessment - Microsoft Internet Explorer

Address <https://ectest.case.edu/clerkshipadministrationnew/RequestOtherAssessment.aspx>

Request will be sent to:

3. Confirm preferred email address for each recipient:



Recipient	Role	* Send to email address:	
Mehta, Neil	Faculty/Attending/Staff Physician	<input checked="" type="radio"/> mehtan@ccf.org	Edit Delete
		<input type="radio"/> <input type="text"/>	



For help with this system email CollegeTech@ccf.org

4. Click "Request Assessment." The request may be changed or deleted from your Outbox.

Review/Modify an Assessment Request

Send an assessment request to the wrong person? Decide not to send a request at all? You can manage your assessment requests from your homepage Outbox.

Inbox <i>assessments within last 30 days</i>		Outbox	
Assessment	Received	Assessment	Sent
James: Patient Based Assessment	3/15/2007	Mehta: Bone Marrow: 51-65 Non-Hispanic White Male with Cancer	3/19/2007 
James: Patient Based Assessment	3/15/2007	Mehta: 51-65 Non-Hispanic White Male with Cancer	3/19/2007 
James: 5-12 American Indian or Alaskan Native Male with Rectal Pain/Bleeding	3/15/2007		

Once your Preceptor starts the assessment, the request will be locked  and cannot be modified. Requests that are available to review  may be opened by clicking on the request name.

Tuesday, March 20, 2007 Basic Core 1, CCF and ITS FACS
Case School of Medicine | Cleveland Clinic Lerner College of Medicine | E-Portfolio

Your Assessment Request Other request(s) you've created for this log: Mehta, Neil (Patient Encounter);

[Edit request for this Preceptor](#) [Delete request for this Preceptor](#) [Redirect request to another Preceptor](#) Request on 3/19/2007 to: **Mehta, Neil** - Faculty/Attending/Staff Physician

*Request type: Procedure: Bone Marrow *To email address: billink@ccf.org

Note to the Preceptor:

The review page provides 3 options:

1. Edit the request (email address or your note)

Your Assessment Request

Edit this request:

Request on 3/19/2007 to: **Mehta, Neil** - Faculty/Attending/Staff Physician

*Request type: Procedure: Bone Marrow *To email address: billink@ccf.org

Note to the Preceptor:

Enter a note to the Preceptor about this request. You may want to include reminders of the encounter (ex: second patient of the day, distinguishing characteristics), but you should not include patient identifiers. Indicate if you already sent a written workup to the preceptor.

2. Delete the request entirely
3. Redirect the exact same request to another Preceptor.

Your Assessment Request

Redirect this request:

Request on 3/19/2007 to: **Mehta, Neil** - Faculty/Attending/Staff Physician

*Request type:	Procedure: Bone Marrow	*To email address:	billink@ccf.org
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Note to the Preceptor:

To another recipient:

Either Enter a new Preceptor for this log: [Add / Edit Preceptor\(s\)](#)

Or Choose a Preceptor you've already entered for this log and Request Type (but not already sent a request for this log/request type):

Hull, Alan - Faculty/Attending/Staff Physician


*Request type:	Procedure(s): <input checked="" type="checkbox"/> Bone Marrow	*To email address:	<input checked="" type="radio"/> hulla1@ccf.org <input type="radio"/> <input type="text"/>
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Enter a note to the Preceptor about this request. You may want to include reminders of the encounter (ex: second patient of the day, distinguishing characteristics), but you should not include patient identifiers. Indicate if you already sent a written workup to the preceptor.

The new recipient must be a Preceptor entered in step 5 of the log, so if you don't see the desired person you must Add/Edit Preceptor(s) and then redirect.

Still haven't received an assessment?

There are a few reasons your request might still be outstanding.

- The recipient intends to do the assessment, but it slipped his or her mind. Don't worry, the CAS will send an automatic reminder a week after the request was sent and then in two weeks if necessary.
- The intended recipient never received the request. You may want to open and review the assessment request from your Outbox and make sure the emailed request went to the right person at the correct email address.
- The recipient decided to opt-out of doing the assessment. You may want to check your Outbox for any requests that have the opt-out icon  displayed. If the opt-out was due to an error or a miscommunication, you may want to review your request.

Viewing Assessments You've Received

31-50 Asian or Pacific Islander Male with Anxiety 3/19/2007

Assessments

Inbox *assessments within last 30 days* |< < 1 of 1 > >|

Assessment	Received
James: Patient Based Assessment	3/15/2007
James: Patient Based Assessment	3/15/2007
James: 5-12 American Indian or Alaskan Native Male with Rectal Pain/Bleeding	3/15/2007

Outbox |< < 1 of 1 > >|

Assessment	Sent
Mehta: Bone Marrow: 51-65 Non-Hispanic White Male with Cancer	3/19/2007
Mehta: 51-65 Non-Hispanic White Male with Cancer	3/19/2007

For help with this system email CollegeTech@ccf.org

You will find completed assessment in your Inbox on your homepage.

- New assessments are bold
- Completed assessments are stored in the Inbox for 30 days. Use the Search feature to find assessments older than this.

Click on the assessment to view. It will open in a new window:

https://ectest.case.edu - Assessment Form - Microsoft Internet Explorer

Core Clerkship Assessment Print Page Close Window

Procedure Assessment

Assessor: Neil Mehta Student: Test Student Date Assessed: 7/8/2006 9:07:00 AM

Competence	Targeted Areas for Improvement	Areas of Strength
Competency: Patient Care		
Procedures <ul style="list-style-type: none"> • Patient comfort • Articulation of steps • Performance of procedure 	sklksaksjd	
Competency: Medical Knowledge		
<ul style="list-style-type: none"> • Correlation with anatomy • Integration of diagnostic-therapeutic reasoning • Description of indications/risks/alternatives for procedure 		
Competency: Communication		
<ul style="list-style-type: none"> • Explain procedure Indications, Risks, Benefits and Alternatives to patient adequately without using jargon • Response to feedback 		
Comments:		

Internet

Searching for Completed Logs and Assessments

To view assessments older than 30 days and finished logs with an encounter date more than 3 days past (remember logs are available for assessment only within 3 days of the encounter), use the Search feature.

The screenshot shows the Clinical Assessment System interface. At the top, there is a navigation bar with the system name, user information (Test Student, Logout), and a set of icons including a magnifying glass (search), a calendar, and a question mark. The search icon is circled in red. Below the navigation bar, there are sections for 'Logs' and 'Assessments'. The 'Logs' section has a search icon circled in red and two tables: 'In Progress' and 'Available for Assessment'. The 'Assessments' section also has a search icon circled in red and two buttons: 'Inbox' and 'Outbox'.

Log	Encounter
Unknown	3/19/2007

Log	Encounter
51-65 Non-Hispanic White Male with Cancer	3/19/2007
31-50 Asian or Pacific Islander Male with Anxiety	3/19/2007

Search for logs and log-based assessments using any or none of the fields provided. Specifying no terms will show results of all logs completed. To search by date, type in the date or click on the Calendar icons. 📅

The screenshot shows the 'Search Non-Log Based Assessments' form. It includes a search bar, a 'Search' button, and several filter fields: Date (between mm/dd/yy and mm/dd/yy), Patient (Race, Age Range, Gender), Primary Symptom or Diagnosis, Procedure, Encounter (Discipline, Setting), and Preceptor (Name, Specialty). A 'Search' button is located at the bottom of the form.

Search Search Non-Log Based Assessments

Complete any or all of the fields below and click Search.

Find logs and log based assessments with:

Date - between 📅 and 📅 To search all dates or with no upper or lower limit leave blank or default value.

Patient - Race Age Range Gender

Primary Symptom or Diagnosis Procedure

Encounter - Discipline Setting

Preceptor - Name Specialty
Only complete this section if you sent the Patient and/or Procedure Log for assessment.
If you sent the Patient and Procedure Logs to different preceptors the Patient Log preceptor will be shown first.

Results of your Search will appear below your Search terms...

<input type="button" value="Search"/>						
Results Click the date to view the log or assessment if available.						
<i>1 log for: Stroke</i>						
Log	Age	Race	Gender	Procedure(s)	Discipline Setting	Preceptor
5/26/2006 (Basic Core 2 at MetroHealth)	>90	Black	Male	None	Neurology Intensive Care Unit	No info yet

There's also a way to look for non patient log based assessments that has a different set of choices for searching...

Click "Search Non-Log Based Assessments." This Search works much the same.

Search		Search Logs and Log Based Assessments	
Complete any or all of the fields below and click Search.			
Find non-log based assessments with:			
Date - between	<input type="text" value="mm/dd/yy"/>	<input type="button" value="and"/>	<input type="text" value="mm/dd/yy"/>
<small>To search all dates or with no upper or lower limit leave blank or default value.</small>			
Assessment Type -	<input type="text" value="Any assessment type"/>		
Preceptor - Name	<input type="text" value="Any preceptor"/>		
Block -	<input type="text" value="Any block"/>	Site -	<input type="text" value="Any site"/>
Discipline -	<input type="text" value="Any discipline"/>		
<input type="button" value="Search"/>			

Accessing your own Reports

Reviewing the different kinds of patient encounters you've experienced and your own performance is easy – click on the Reports button...

for 2 types of reports:

- Patient and Procedure log totals

Symptom/ Diagnosis	# Seen: Primary (Secondary)	Assessments Requested	Assessments Received
Abdominal pain	1 (2)	0	0
Anemia	3 (0)	1	0
Back pain	1 (0)	0	0

- and Competency summary

Competency	# Assessments for Competency	# Assessments for Targeted Areas For Improvement	# Assessments for Areas Of Strength
Communication	14	4	12
Medical Knowledge	9	0	9
Patient Care	15	3	13
Practice-based learning	4	1	4
Professionalism	11	1	10