

Clinical Audit, Treatment Plan, and Skill Acquisition Self Evaluations

This survey can be assigned through the task feature. To assign a task the supervisor will:

- Click on the team tab
- Click on the task tab
- Click on the blue + New Task button
- Select Assessment for task type
- Select the user(s) the task will be assigned to
- Click next
- Select the Assessment of choice
- Click next
- Complete assigning the task as normal
 - Here is our knowledgebase article that describes [how to assign a task](#)

Once the supervisor assigns the task, the supervisee will complete their portion of the self evaluation:

- Click on the task tab
- Click on the task of interest
- Scroll down and click assessment
- Enter information
- Click on finalize (this will send the task to the supervisor so they can complete their evaluation of supervisee performance)

The supervisor can view the self evaluation and complete their evaluation of performance by following the below steps:

- Click on the task tab
- Click on the task of interest
- Scroll down and click assessment
- Enter information
- Click on finalize (this will mark the task as complete and the score will be added to the supervisee's clinical score)

The supervisor and supervisee can view the completed evaluation by following the below steps:

- Click on the team tab
- Click on the task tab
- Filter to completed tasks
- Click on the task of interest
- Click on assessment
- View answers

*This will also be viewable in the assessments portion of the supervisors and supervisees platform.

Supervision, General Meeting, Disciplinary Meeting Forms

This survey can be assigned through the task feature. To assign a task the supervisor will:

- Click on the team tab
- Click on the task tab
- Click on the blue + New Task button
- Select Assessment for task type
- Select the user(s) the task will be assigned to
- Click next
- Select the Assessment of choice
- Click next
- Complete assigning the task as normal
 - Here is our knowledgebase article that describes [how to assign a task](#)

Once the supervisor assigns the task, they will complete their portion of the form:

- Click on the task
- Scroll down and click assessment
- Enter information
- Click on finalize (this will send the information to the supervisee so they can provide feedback)

The supervisee can view the form and complete their feedback portion by following the below steps:

- Click on the task tab
- Click on the task of interest
- Scroll down and click assessment
- Enter information
- Click on finalize (this will mark the task as complete)

The supervisor and supervisee can view the completed form by following the below steps:

- Click on the team tab
- Click on the task tab
- Filter to completed tasks
- Click on the task of interest
- Click on assessment
- View answers

*This will also be viewable in the assessments portion of the supervisors and supervisees platform.