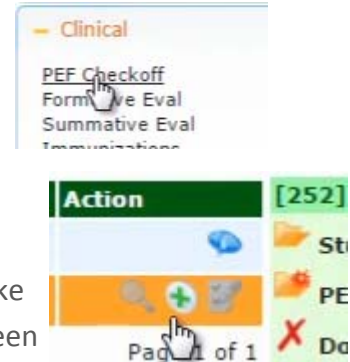


## Adding and Editing Checkoffs

Before completing checkoffs it's vital to pay attention to the buttons in the action column. To achieve the results you want, it's vital to choose the action you want from the outer menu— you have to decide to add or edit from the outer menu. The SYMBOLS/ACTIONS within Clinical Trac are defined as follows:

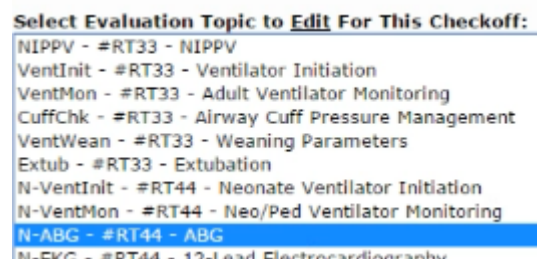
- **VIEW** (Magnifying Symbol): Allows you to **review** an existing record
- **ADD** (Plus Symbol): Allows you to **create** a new record
- **EDIT** (Pencil Symbol): Allows you to **modify** an existing record



1. From the left-side menu choose Clinical → PEF Checkoff.
2. If the “View” and “Edit” symbols are grayed out then there are no checkoffs currently added.
3. From the Action column choose “Add”. (**NOTE:** This is assuming you'd like to add a new entry. If you select “Add” for a checkoff that has already been added, then there will be multiple versions of the record. When you want to edit a prior entry, select “Edit”. But if you choose “Edit” when you really want to create a new entry, you will inadvertently save over a prior original entry, erasing it permanently. So be sure to select the correct action here for your goal. Also: if you select “View” here, you can view prior entries, but can make no permanent changes. You can type an entire entry, but you will be frustrated to find there will be no “Save” button when you are done.)
4. You may not be sure if you need to “Add” a new entry— you may need to “Edit” a checkoff that has already been added. To be sure, select “View” and look under the “Student Check-Off Assessment History”. In this sample entry, the following is the information indicated in the various columns:
  - **“Stud”**: The student has added the “Sx ETT” checkoff, but no instructors/preceptors have checked off the student.
  - **“Precp”**: There have been 2 out of the 5 (0.40) required preceptor “ABG” checkoffs completed.
  - **“Lab”**: The lab instructor has added the “BiPAP/NIPPV” and “ABG” checkoffs.
  - **“Clinic”**: There have been no checkoffs completed by the clinical instructor.

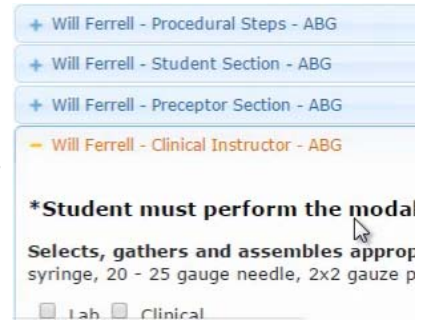
| Course Code | Semester        | Stud | Precp | Lab | Clinic |
|-------------|-----------------|------|-------|-----|--------|
| BiPAP/NIPPV | 01-RTH 125 FL16 | 0    | 0.00  | 1   | 0      |
| Sx ETT      | 01-RTH 125 FL16 | 1    | 0.00  | 0   | 0      |
| N-ABG       | 01-RTH 125 FL16 | 0    | 0.40  | 1   | 0      |

5. If the checkoff you wish to enter is already listed there, you'll need to go back to the prior menu and select “Edit” to modify it. If it is not in the history list, you will need to go back and select “Add”.
6. Let's assume you'd like to “Edit” the ABG checkoff already added as seen above. Once you've selected “Edit” from the outer screen, select the checkoff from the left-side list, then under “Student Check-Off Assessment History” below, select the desired checkoff and select “Edit” from the action column.

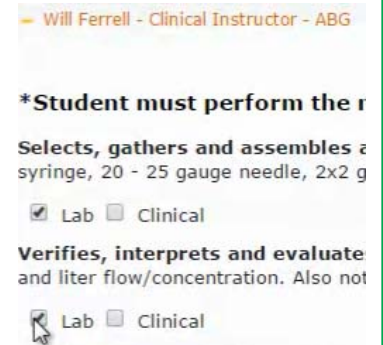


## Adding and Editing Checkoffs (continued)

7. For this example we have chosen a different student, and may now choose to add a preceptor checkoff (by selecting the 4th blue bar entitled "Preceptor Section") or an instructor checkoff (both clinical and lab instructor checkoffs are found together under the 5th blue bar entitled "Clinical Instructor". Here you can see the "Clinical Instructor" section has been selected, in order to add a **Lab Instructor** ABG checkoff.



8. You would now begin selecting "Lab" checkboxes next to each step of the checkoff. However, in this system, it doesn't matter how many of the check boxes you select— you can select one, all, or any number in between. The system is triggered to indicate completion once you have saved the checkoff— assuming you have correctly chosen your name from the dropdown next to the "Lab Instructor" option, selected the date from the calendar next to the "Lab Date" option, and then selecting a "Save" option.



9. For your "Lab Date" click in the box and use the pop-up calendar for the date.

Lab Instructor:  Clinical Instructor:

Lab Date:  CI Date:

| Su | Mo | Tu | We | Th | Fr | Sa |
|----|----|----|----|----|----|----|
| 1  | 2  | 3  | 4  | 5  | 6  | 7  |
| 8  | 9  | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| 29 | 30 | 31 |    |    |    |    |

If you try to type in the date, the system may not be able to correctly process the date.

10. You may choose to add comments if you'd like. Once you've made all your choices, select a "Save" option. Check to be sure your entry has been correctly saved under the "Student Check-Off Assessment History" by looking in the lab instructor column (titled "Lab") to see that a "1" has appeared.

11. Let's say you'd now like to add a preceptor checkoff. You'd select the blue bar titled "Preceptor Section", select the checkbox next to the number of the checkoff being completed, and corresponding completion date, your name, and save.

12. You will be able to add a new checkoff by returning to the outer menu (from the left-side menu choose Clinical —>

PEF Checkoff), and selecting "Add" from the Action column, and following the same steps as above.