Clinical evaluation guide for AGNP & PMHNP students, faculty, and preceptors

Evaluations are conducted in stages. Each successive stage automatically opens when the one before it is completed:

**Midterm**
Required if 100+ hours expected at a site by end of term.

- **MTE1: Student Self-Assessment**
- **MTE2: Preceptor Assessment (In consultation with instructor)**
- **MTE3: Faculty Review and Evaluation Outcome**
- **MTE4: Student Review of Completed Evaluation**

**Final**
Required if 50+ hours attended at a site by end of term.

- **FE1: Preceptor Assessment (In consultation with instructor)**
- **FE2: Faculty Review and Evaluation Outcome**
- **FE3: Student Review of Completed Evaluation**
- **Student Evaluation of Practicum/Agency**
- **Final Timesheet Report**

Quick Guides provide very targeted information about a topic. You can find other InPlace guides on our website.
Overview of Midterm Evaluations

1) Student Self-Assessment
Student identifies clinical strengths and areas for improvement.

2) Preceptor Assessment
The preceptor listed on the student’s placement is emailed an assessment. They can review the student’s self-assessment before responding.

3) Faculty Review and Evaluation Outcome
The seminar instructor reviews prior stage responses, and after consulting with the preceptor or arranging a site visit, provides a summary and outcome.

4) Student Review
The student reviews prior stage responses and submits this last stage to verify their receipt. When all stages are completed, a PDF report becomes available to download from their placement’s Assessment tab.

Action Plan for At-Risk Student
A student at risk of failing is required to develop an action plan with their instructor and preceptor to target areas in need of improvement.

**Only if Stage 1 is completed**

**When?**
- Late September (Fall terms)
- Early March (Spring terms)
- Late June (Summer terms)

*Timings may vary.

Students who are behind or ahead of schedule in completing required practicum hours should complete a paper evaluation.
Overview of Final Evaluations

Instead of a self-assessment, students complete a separate survey, *Student Evaluation of Practicum/Agency*, which is not tied to other evaluation stages.

1) Preceptor Assessment

The preceptor is emailed a final, competency-based assessment. The student should also provide them with a printed timesheet report for signature when finishing hours.

When?

- Late November (Fall terms)
- Early May (Spring terms)
- Late July (Summer terms)

*Timings may vary.*

Students who are behind or ahead of schedule in completing required practicum hours should complete a paper evaluation.

2) Faculty Review and Evaluation Outcome

The seminar instructor reviews the preceptor’s assessment, and after consulting with the preceptor or arranging a site visit, provides a summary and outcome.

3) Student Review and Final Timesheet Report

The student submits this last stage to verify their receipt. When finished at a site, they should also upload a signed final timesheet report to their placement’s Details tab.
Evaluation Requirements

Students with One Placement

Students with one placement for the same term and course are required to complete a midterm and final evaluation.

Students with More Than One Placement

Evaluation requirements depend on the total attended hours expected at each site by the end of the term:

<table>
<thead>
<tr>
<th>Total hours expected at site by end of term:</th>
<th>Midterm Required?</th>
<th>Final Required?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 50 hours</td>
<td>NO</td>
<td>NO</td>
</tr>
<tr>
<td>Between 50-99 hours</td>
<td>NO</td>
<td>YES</td>
</tr>
<tr>
<td>100 hours or more</td>
<td>YES</td>
<td>YES</td>
</tr>
</tbody>
</table>

These are general guidelines and are subject to change.

When in doubt, we recommend completing an evaluation. If one is not required at a secondary site, there are two ways to prevent it from being added to (or progressing in) an online evaluation campaign:

- **Students**: Do not complete stage 1 of the MTE (Self-Assessment) for the secondary placement to prevent it from progressing to the preceptor stage.

- **Instructors**: Tick the ‘Omit from Evaluation’ checkbox on the placement details located under ‘Midterm [or Final] Evaluation Requirements’.
How Evaluations Are Sent

MTE = Midterm Evaluation; FE = Final Evaluation

Student Self-Assessment (MTE1)
- Notified by email (when open and overdue) and posted on student’s To Do list in InPlace.
- Must be completed before preceptors are contacted for stage 2 of the midterm.
- Students who are ahead or behind schedule should complete a make-up/paper evaluation instead.

Preceptor Assessment (MTE2 / FE1)
- Opens after the self-assessment stage is completed during midterms, or at the start of finals.
- All preceptors listed on the placement are notified by email (when open and overdue).
- Only one response per placement can be submitted. If 2+ preceptors are listed on a placement, they should plan to complete it together (e.g., one saves their response as a draft and the other adds to it and submits) or nominate one to complete it. Additional responses may also be collected by paper form if requested.

Faculty Review and Evaluation Outcome (MTE3 / FE2)
- Opens after the preceptor stage is completed.
- Notified by email (when open and overdue) and posted on faculty’s To Do list in InPlace.

Student Review (MTE4 / FE3)
- Opens when the faculty review stage is completed.
- Notified by email (when open and overdue) and posted on students’ To Do list in InPlace.
- An evaluation’s overall status will not update to “Completed” until this last stage is submitted.
Submitting a Response

When a stage opens for responses, the stage’s respondent will be notified by email.

A reminder may also be sent if a stage becomes ‘overdue.’

To prevent delays in later stages, please respond no later than 5-7 days from your initial notification.

Use the dropdown menu at the top of the evaluation to view prior stage responses, then submit your response.

Students, faculty, and preceptors with guest accounts will find links to their open assessments on their home page To Do list in InPlace.
While drafts are automatically saved as you complete the page, we recommend saving your progress periodically to avoid unexpected time-outs or other issues that may cause you to lose your work (rare).

When you reach the bottom of the page, you may see a link to download previous stages (PDF) near the signature area. Note that this report omits identifying information, such as the student’s name and agency.

You can save a PDF of previous stages using the link at the bottom of the page (identifying information is omitted).

Click submit when ready, then confirm your response in the pop-up window.
Tracking Evaluations

Requires login. Available to students/faculty and preceptors with guest InPlace accounts.

The students’ placement details will show the completion status of each stage (updates nightly).

Signed in users can also view the evaluation in the placement’s Assessment tab to check for more recent (same-day) stage responses.
During Midterm and Final evaluation campaigns, preceptors will receive up to two scheduled notifications from InPlace:

1) when their stage opens, and

2) if they do not submit a response after ~5-7 days of the first notification.

Follow-up

If a preceptor stage remains incomplete for over a week or shows a status of ‘Overdue’, please follow up with the preceptor to ensure they have received it. Agency email systems may flag InPlace notifications as bulk mail or place other restrictions on messages from external parties.

Switching to a Paper Evaluation Form

If an evaluation has not advanced to the later stages (Faculty or Student Review) after ~2 weeks of launching, if you are finishing hours at a placement early, or if the end of the term is approaching, complete a paper evaluation form instead.

Preceptors are not sent an online assessment if any of the following apply:

• If their email is missing or incorrect in the Contacts area of the placement details. It is the student’s responsibility to review and correct this information in the first 3 weeks of the term, and to complete a make-up/paper evaluation if an online evaluation was not successful.

• During midterm evaluations, if the student does not complete the self-assessment stage.

• If a placement is marked to be omitted from an evaluation (e.g., 2nd placements with low hours).

• If a placement starts late or ends early. Students significantly behind or ahead of schedule should complete a make-up/paper evaluation with their preceptor when the timing is most appropriate (i.e., a midterm evaluation after ~50-100 hours at a site, or a final evaluation one week before the placement ends).
Evaluations are listed on the Surveys/Assessments page in your navigation bar. Each row shows one stage. The Status column shows the listed stage’s status (not that of the entire evaluation).

Use the filters at the top to show or hide records as needed.

If you do not see other stages of a student’s evaluation, they have not yet been completed online.

Midterm: If only the student (MTE1) & faculty stages (MTE3) are listed, the preceptor stage (MTE2) is not complete.

Final: If only the faculty stage (FE2) is listed, the preceptor stage (FE1) is not complete.

ℹ️ Check if a paper evaluation form has been uploaded on the placement’s details tab.
Assessment List Filters

Available to faculty users.

The list shows evaluations awaiting your response by default (uncheck the box “Items requiring response only” to view all records, including completed stages).

**Campaign Names** are formatted the same every course and term, making them easier to search consistently:

- Partial search by course: N755, N757, N768, N782, N783
- Partial search by term: 2022 SU, 2022 FA, 2023 SP, etc.
- Search by full campaign name: *N782 Midterm Evaluation (2022 SP)*, *N755 Final Evaluation (2022 FA)*, etc.

Uncheck box to view all stages.

Click on a column heading to sort records by that column (sorting by Student or Stage Name is usually the most helpful).

Click the **magnifying glass** to filter by survey name, or type ‘midterm’ or ‘final’.

Click the **magnifying glass** to filter by survey name, or type ‘midterm’ or ‘final’.

Uncheck box to view all stages.
Students who submit a paper evaluation form may not appear in your Assessment List in InPlace (i.e., usually when their Preceptor stage is not completed online).

Please instruct students with outstanding evaluations open for longer than 2 weeks to download and complete a paper evaluation with their preceptor.

Faculty Review of Paper Evaluation:
A field to review and provide an outcome for an uploaded paper evaluation is available on a placement’s details tab (right column) under [Midterm/Final] Evaluation Requirements.

Tip: As students finish up their placements, they will stop being listed on your homepage under ‘Attendance Summary’. You can find them by going to your menu > Students and filtering by Placement Status = Current.

The field includes a dropdown menu to choose an outcome for the evaluation and a comments area to provide a summary of the student’s progress.
When all stages have been completed, download a complete assessment report (PDF) from a student placement’s Assessment tab.

While an evaluation is still in progress, this page will display a link to View Responses.

Once all stages are complete, this link changes to View Report (PDF file).
Paper Evaluations

If a student is behind or ahead of schedule when completing a placement for the term, or if an online evaluation is not successfully completed in InPlace for any reason, they should complete a paper evaluation form (Word document) with their preceptor and upload a signed copy to their placement details. Common reasons for paper evaluations include:

- If hours are completed outside of scheduled midterm or final evaluation periods (i.e., ahead or behind schedule)
- If one or more stages of an online evaluation is not submitted, blocking its overall completion

**Example:** If an evaluation is stalled at the Preceptor stage for over 2 weeks (typically with an “Overdue” status)

Documented clinical evaluations by faculty (via direct clinical observation or in consultation with supervising preceptors) are an accreditation and NP licensure requirement. Students should be given an Incomplete grade until outstanding clinical evaluations have been completed.

**Downloading the Evaluation Form**
Students can download a make-up evaluation form from their Shared Documents page to complete with their preceptor.

**Submitting a Paper Evaluation**
Students should upload a legible scan (or photos pasted into a Word or PPT file) of the signed form to their placement details.
Upload a Paper Evaluation Form

There are two file upload fields on every placement for completed paper/make-up evaluations, if needed. Both are found on the placement’s *Details* tab:

1. In the section, *Midterm Evaluation Requirements*
2. In the section, *Final Evaluation Requirements*

Each file upload field accepts one file. Forms with missing pages are not acceptable documentation. Scan all pages to a single, merged PDF (or paste photos of each page into a Word or PowerPoint file) before uploading.

1. Tick the checkbox,
2. Upload the timesheet as one attachment (all pages must be merged into one file),
3. Press *Submit*.

Click on the X next to the uploaded file if you need to clear it.
Final Timesheet Reports

When finishing a placement, students must upload a signed final timesheet report to their placement Details under Final Evaluation Requirements.

They can download a report from their Shared Documents page.

This requirement serves as supporting documentation for NP licensure that the student has achieved enough approved clinical hours under preceptor supervision.

Reports are locked for editing in Word to discourage changes being made outside of InPlace. The document can be opened as read-only for printing.
The Timesheet Report (file upload field) is located on the placement’s Details under Final Evaluation Requirements. The field allows one attachment. Use a scanner, mobile scanning app (e.g., Adobe Scan), or cellphone camera to create the file. Please check that each page is legible before submitting.

One page: PDF or high-resolution photo
Two+ pages: PDF or photos of each page pasted into a Word or PowerPoint file (.doc, .docx, .ppt, .pptx, .rtf)

1. Tick the checkbox,
2. Upload the timesheet as one attachment (all pages must be merged into one file),
3. Press Submit.

Click on the X next to the uploaded file if you need to clear it.
Evaluation Checklist

Refer to this checklist to verify that all evaluation requirements are met by the end of each practicum. Students with missing evaluations or final timesheet reports must receive an incomplete grade for the seminar section of the practicum until such requirements are met.

**Midterm Evaluation***

- MTE1: Student Self-Assessment
- MTE2: Preceptor Assessment
- MTE3: Faculty Review and Evaluation Outcome
- MTE4: Student Review of Completed Evaluation

*ALTERNATE: Student uploads a signed paper/make-up evaluation form to their placement details.

**Final Evaluation***

- FE1: Preceptor Assessment
- FE2: Faculty Review and Evaluation Outcome
- FE3: Student Review of Completed Evaluation

*ALTERNATE: Student uploads a signed paper/make-up evaluation form to their placement details.

- Student uploads a Final Timesheet Report (signed by preceptor) to their placement details.