Preceptor Portal Quick Reference Guide

Review student activity, complete assessments, and provide feedback — all in one place.

YOUR WORKFLOW

1. **Open Assessment Request**
   From Dashboard or My Tasks

→

2. **Review Patient Logs**
   Understand student clinical activity

→

3. **Submit Feedback**
   Complete assessment and submit

KEY AREAS

Dashboard
View pending tasks and activity

Patient Logs
Review student encounters for context

Assessments
Access Weekly and Ad-Hoc requests

Students
View assigned students and activity

ASSESSMENT TYPES

Weekly Assessments

- Automatically generated weekly
- Requested by the student
- Linked to patient logs

Ad-Hoc Assessments

- Requested manually by students
- Can be triggered via QR code during encounters
- Access Anywhere

SIMPLE PROCESS
Review - Evaluate - Submit

ACCESS ANYWHERE
Desktop, tablet, mobile

SUPPORT
casmeded@case.edu

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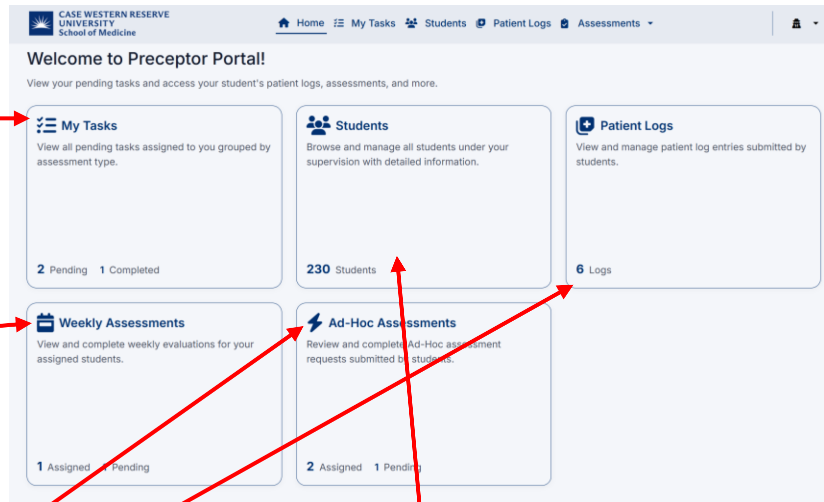
Dashboard Overview

The Dashboard is your home base. It provides a quick view of your tasks, students, and assessment activity so you can easily see what requires your attention.

KEY SECTIONS



1 My Tasks

View all pending and completed tasks assigned to you.

Start here to see what requires your attention.

2 Weekly Assessments

View and complete weekly evaluation requests.

These are automatically generated and linked to patient logs.

3 Ad-Hoc Assessments

Review and complete ad-hoc assessment requests submitted by students.

These may be requested in person using a QR code or manually through the system.

4 Patient Logs

View patient log entries submitted by students.

Use these logs to understand student clinical activity.

5 Students

Browse and manage students under your supervision.

Access student details and view their assessments.

HELPFUL TIPS

- The numbers on each tile reflect your current workload
- Click any tile to go directly to that section
- Your dashboard updates in real time

STAY INFORMED

Check your dashboard regularly to keep assessments up to date

FOCUS ON PRIORITIES

Start with 'My Tasks' to see what needs your attention first

TIMELY FEEDBACK

Complete Assessments promptly to support student learning

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Weekly Assessments

View and complete weekly evaluation requests submitted by students.

YOUR WORKFLOW

1

Open Weekly Assessments

Navigate to Assessments → Weekly Assessments

↓

or access directly from My Tasks

2

Select a Request

Locate the student assessment request

↓

Click Review to begin

3

Review Patient Logs

Expand the request to view linked patient logs

↓

Use these to understand the student's clinical activity

4

Complete the Assessment Form

Provide overall feedback based on your interaction

↓

Expand sections as needed and add comments

5

Submit Assessment

Click Submit to complete

or Save as Draft to finish later

WHATS INCLUDED

- Student and rotation details
- Course and session information
- Linked patient logs
- Structured feedback form

KEY NOTES

- Weekly requests are submitted by the student every Thursday
- Patient logs can be connected to these requests
- Weekly assessment scores inform the end-of-rotation grading

BEST PRACTICE

Provide clear, specific feedback with examples to support student development.

TIP

Expand the patient logs section to quickly review encounters before completing your assessment.

SIMPLE PROCESS
Review - Evaluate - Submit

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CASE WESTERN RESERVE UNIVERSITY
School of Medicine

Clinical Assessments System

Patient Logs

View and review patient logs submitted by students you have worked with during clinical encounters.

HOW THIS WORKS

- Patient logs are grouped by Rotation and Course
- Each group shows logs submitted by students you supervised
- Use filters to quickly locate specific logs

REVIEWING PATIENT LOGS

1. **Locate Logs**
   Browse logs grouped by rotation and course, or use search and filters
2. **Expand a Group**
   Expand a course to view individual student log entries
3. **Open a Log**
   Click View Log to open full patient log details

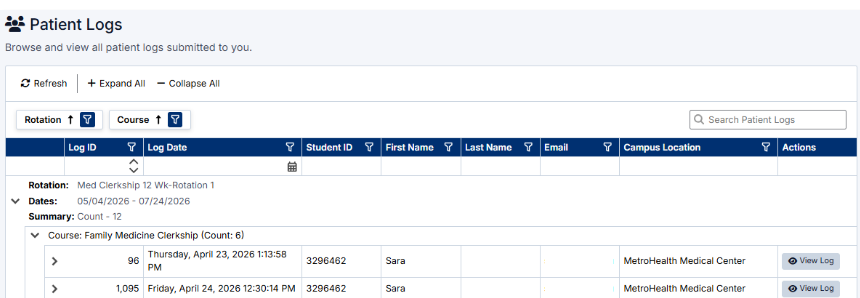
LOG DETAILS INCLUDE

- Session, discipline, and campus
- Encounter date and setting (e.g., inpatient/outpatient)
- Preceptors involved in the encounter
- Patient demographics (age, gender, ethnicity)
- Clinical conditions and diagnoses
- Observed student activities
- Student role and level of participation

WHAT YOU'LL SEE

Patient Logs List View

Logs are grouped by Rotation and Course
Expand a course to see individual student log entries



LOG DETAILS

- Encounter Date
- Rotation & Course
- Clinical Conditions
- Observed Activities
- Student Role

KEY POINTS

- Logs reflect real encounters where you were involved as a preceptor
- Only relevant logs tied to your supervision are shown
- Logs provide supporting context for assessments

BEST PRACTICE

Use patient logs to reference specific examples when completing assessments to provide accurate and meaningful feedback

TIP

Patient logs are often accessible directly within assessment requests, allowing you to review them without leaving the assessment workflow

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Ad-Hoc Assessments

Review, complete, or initiate ad-hoc assessments for your students.

WORKFLOW 1: STUDENT INITIATED

1. **Student Requests Assessment**
   Via system or QR code during an encounter
2. **Open Ad-Hoc Assessments**
   Navigate to Assessments → Ad-Hoc Assessments
3. **Select Request**
   Locate the assessment request and click **review**
4. **Complete the Assessment Form**
   Provide overall feedback based on your interaction
   Expand sections as needed and add comments
5. **Submit Assessment**
   Click Submit to complete or Save as Draft to finish later

WORKFLOW 2: PRECEPTOR INITIATED

1. **Go to Students Page**
   Search for Student
   Use search or filters
2. **Create Assessment**
   Select Create Assessment
3. **Select Rotation (if applicable)**
   Choose the correct rotation if the student has multiple
4. **Complete the Assessment Form**
   Provide overall feedback based on your interaction
   Expand sections as needed and add comments
5. **Submit Assessment**
   Click Submit to complete or Save as Draft to finish later

WHATS INCLUDED

- Student and rotation details
- Assessment request information
- Feedback form with competencies

KEY POINTS

- Can be initiated by student or preceptor
- Not linked to patient logs
- Flexible and not tied to weekly schedule

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Clinical Assessments System

Students

View, manage and assess students under your supervision.

INITIATING AN ASSESSMENT (PRECEPTOR-INITIATED)

Preceptors can start an assessment directly from this page:

1. Locate the student
2. Select Create Assessment
3. Choose the appropriate rotation (if the student is in multiple rotations)
4. Complete and submit the assessment

WHAT IS THIS PAGE FOR?

- Find students assigned to you
- View rotation and course details
- Access and complete assessments
- Initiate new assessments for students

YOUR WORKFLOW

Search for a Student

Use search or filters to locate a student

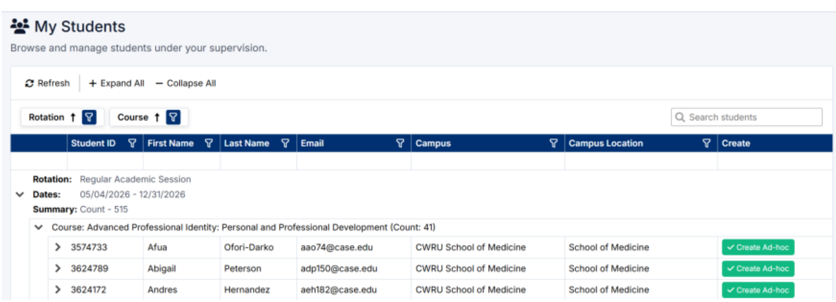
View Student Details

See rotation, course, and session information

Take Action

- View assessments
- Create an assessment
- Review student activity

STUDENT LIST VIEW


My Students

Browse and manage students under your supervision.

Refresh | + Expand All | — Collapse All

Rotation | Course | Search students

Rotation: Regular Academic Session
Dates: 05/04/2026 - 12/31/2026
Summary: Count - 515

Course: Advanced Professional Identity: Personal and Professional Development (Count: 41)

Student ID	First Name	Last Name	Email	Campus	Campus Location	Create
3574733	Afua	Ofori-Darko	aao74@case.edu	CWRU School of Medicine	School of Medicine	✓ Create Ad-hoc
3624789	Abigail	Peterson	adp150@case.edu	CWRU School of Medicine	School of Medicine	✓ Create Ad-hoc
3624172	Andres	Hernandez	aeh182@case.edu	CWRU School of Medicine	School of Medicine	✓ Create Ad-hoc

KEY ACTIONS

- View Assessments → See all assigned assessments
- Create Assessment → Start a new Ad-Hoc assessment
- Browse Rotations → Understand student placement

KEY POINTS

- Displays only students assigned to your supervision
- Central location for managing student activity
- Allows preceptors to initiate assessments at any time

TIP

Use this page to quickly create an assessment immediately after working with a student

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