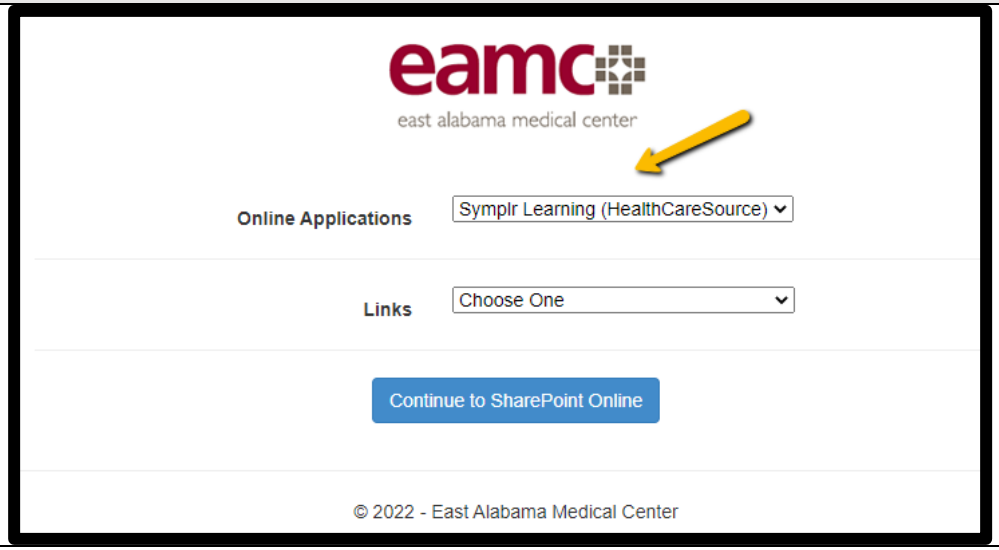
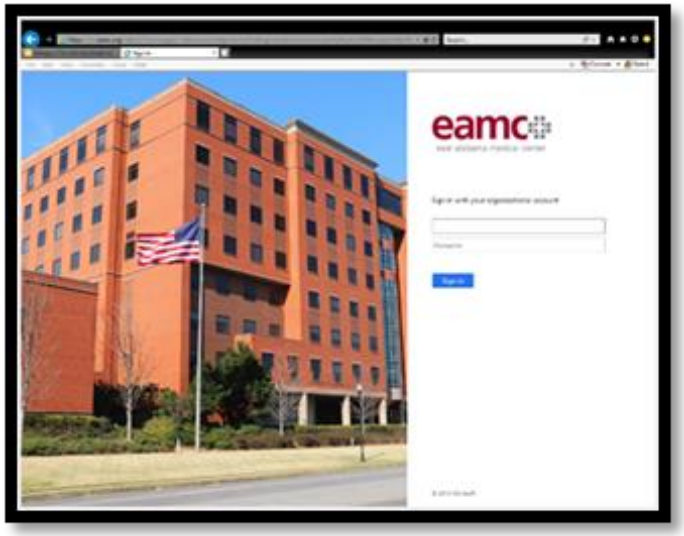
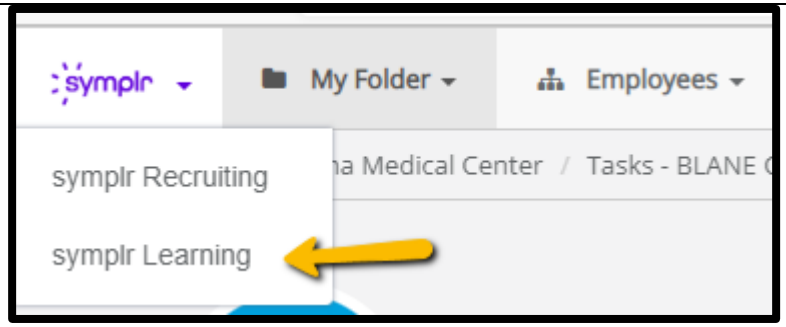
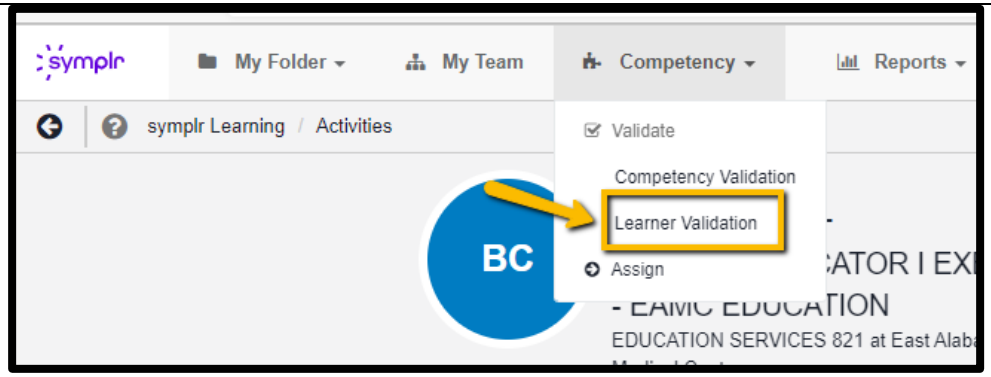
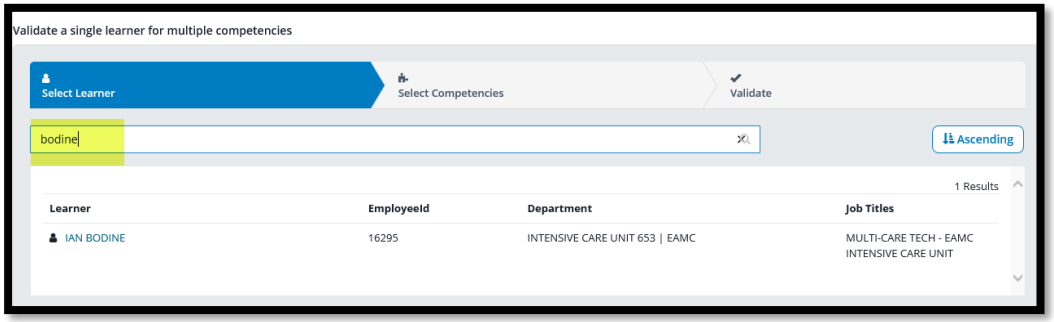
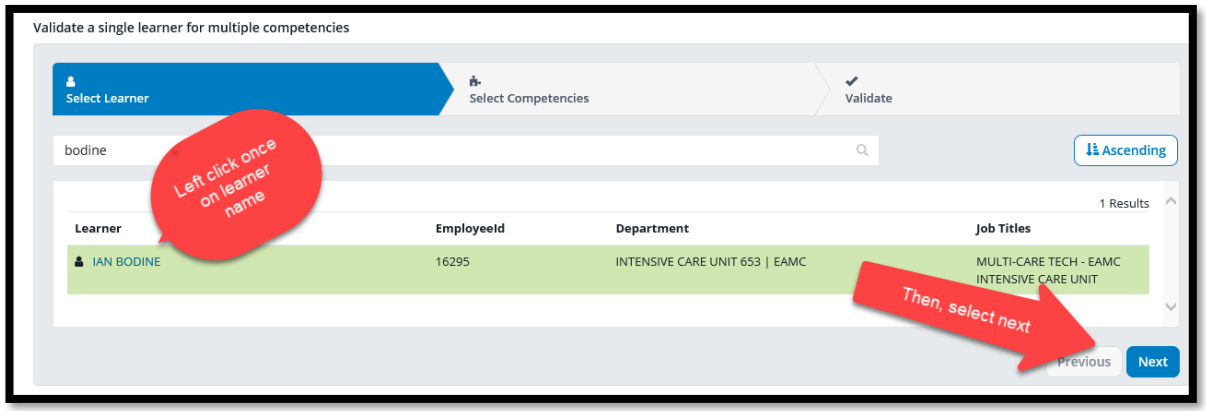
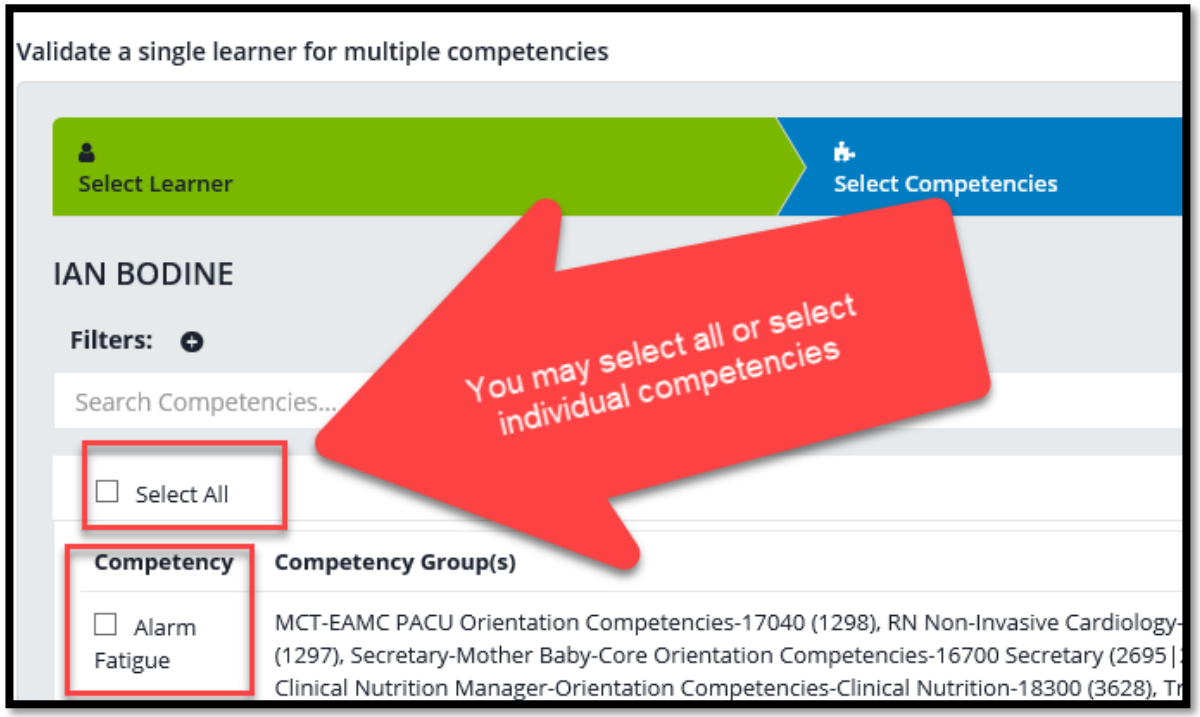
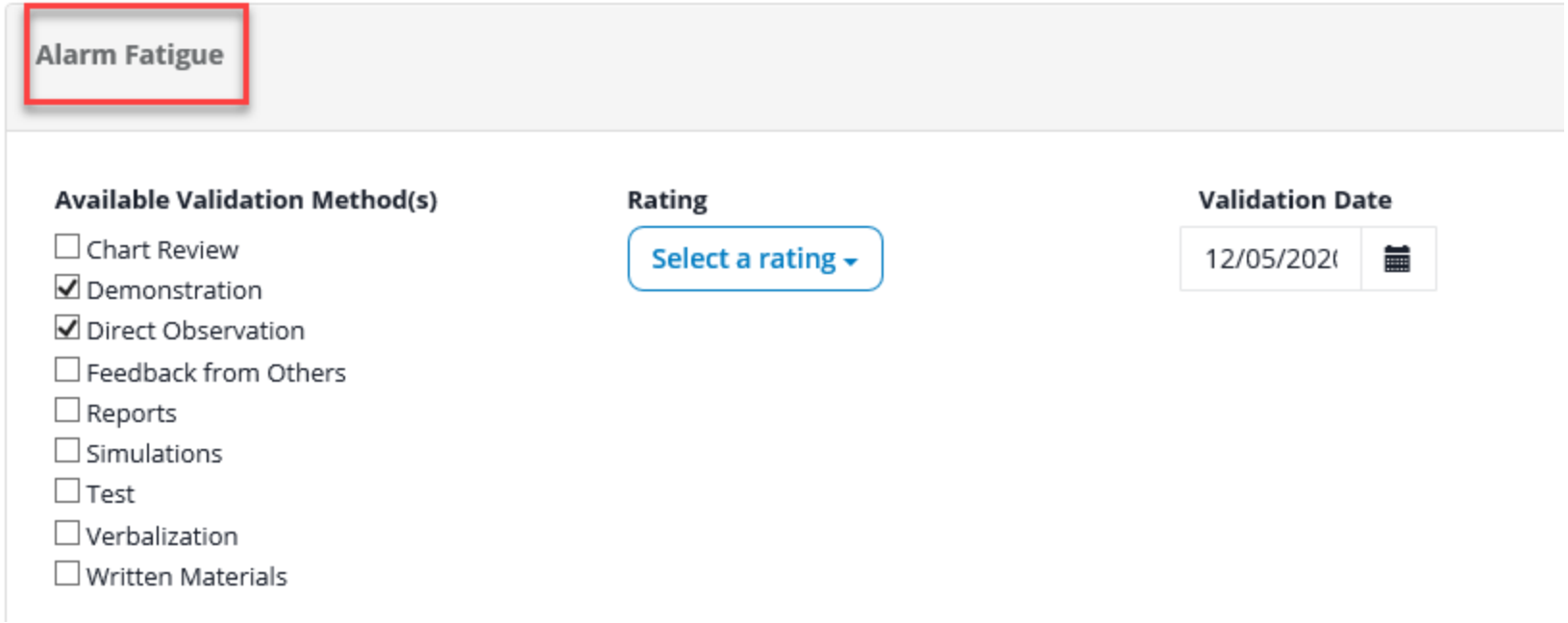
Documenting Orientation Competencies for an Individual Employee (Learner) in Symplr

Step	Details	Illustration
Go to SharePoint	Select Symplr from the online applications menu	
Log in	Username: **email** (example: Jennifer.terry@eamc.org) Password: **network secure password**	

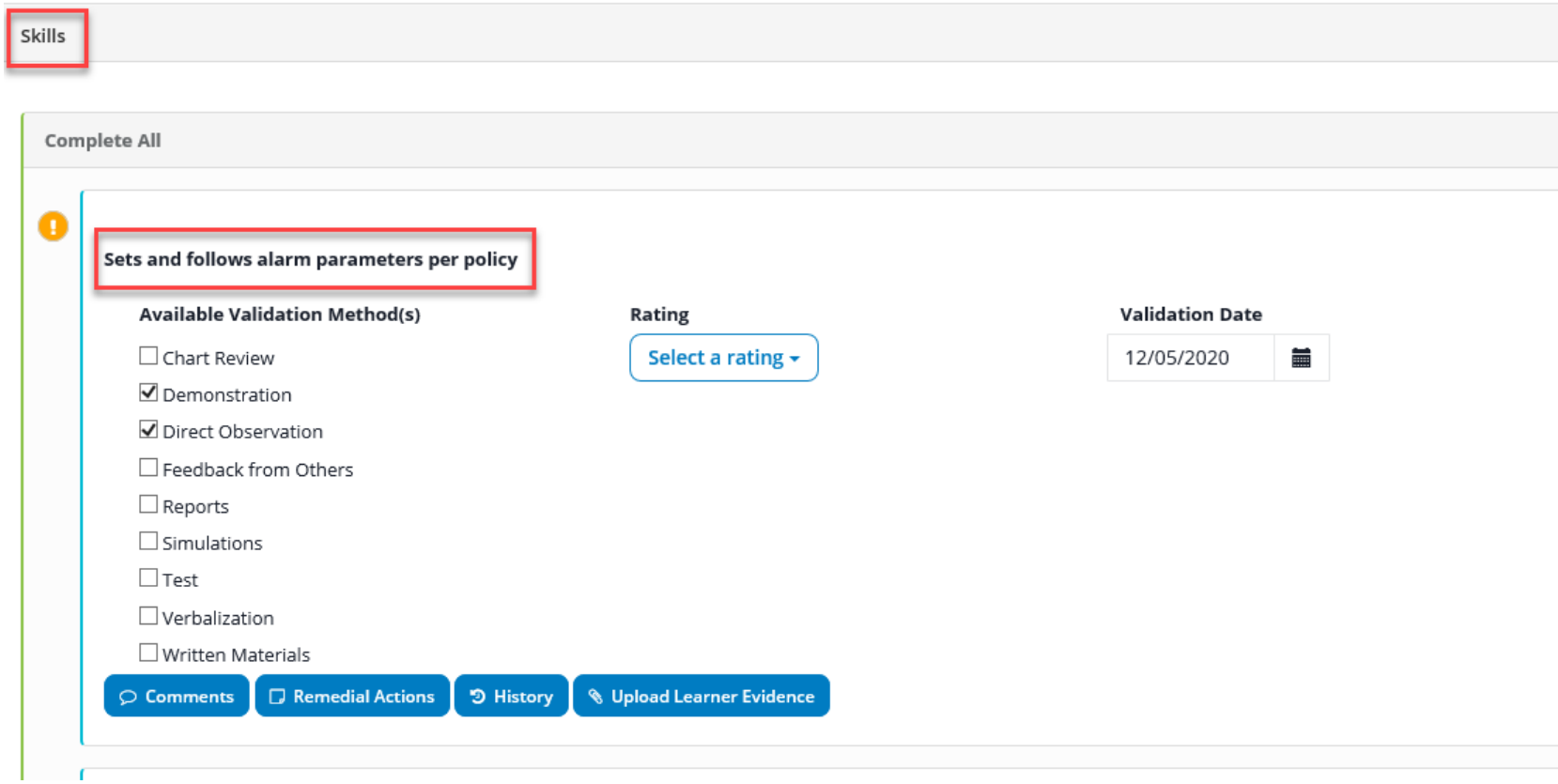
When you first log in you will be in performance manager where JDs and PAs that you complete for HR are located. To get to competencies, you will need to navigate to **Symplr Learning.**	In the top left corner, click on the Symplr box and select the option “Symplr Learning”	
Choose the **Competency** tab from the top row or menu bar	Select Learner Validation to validate at the learner level. (Note: you would select competency validation if you are documenting competency validation for multiple learners on a single competency (think skills day or in-service).	
Search for Employee (Learner)	Type employee’s name in search box	

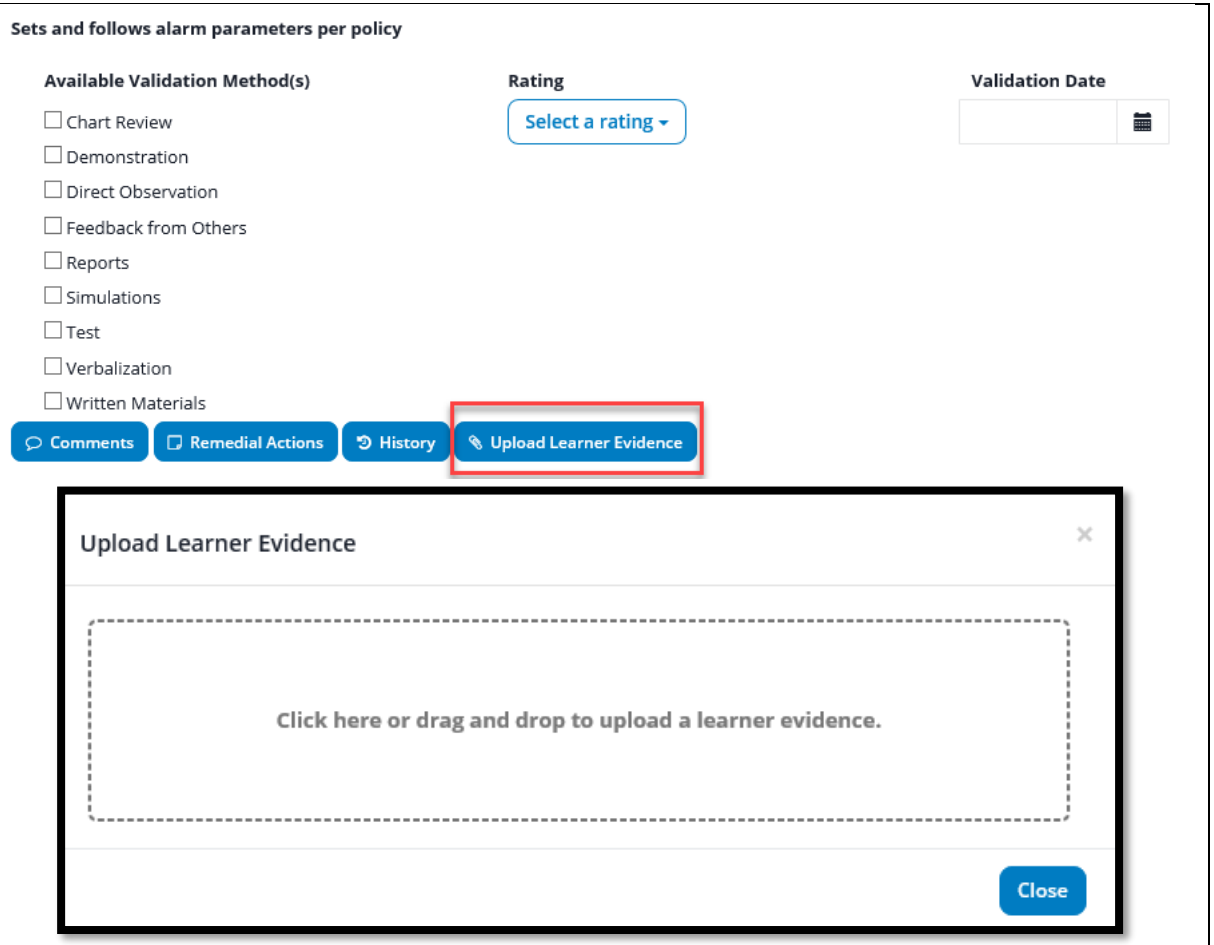
Select Employee	After typing employee's name in search box, notice that the Learner's name shows in blue font in the box below 1. **Left click once** on the employee's name (will turn green) 2. Select **Next** (blue box).	
Select the competency or competencies you wish to validate. Note that the name of the competency is listed under the heading "competency" The information listed under competency groups is for administrative purposes only	**Select only the individual competencies** needed at a particular time **OR*** Check the box next to **"select all" to select all orientation competencies**	

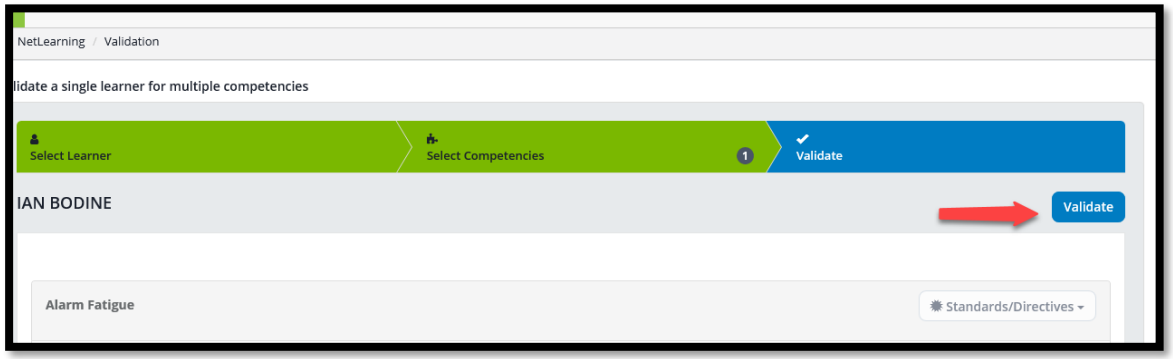
After selecting competencies….	Click next at bottom of page	

Validate Competencies In this example, we only selected one competency, alarm fatigue Document all elements of competency validation for this particular competency: **Make any needed changes to the**	Notice the bar at the top, indicating which step you are on---we are in the “validate” step  1. **Validation Method(s):** you can select more than one method (select all methods that were used) 2. **Rating:** Select competent, not competent, or not applicable. 3. **Validation Date:** Select the date the competency was actually validated. **Remember, all orientation competencies should not be documented as being validated on the same date, but rather actual dates of validation that occurred throughout the 90-day orientation period should be documented (**exception—contract staff who are validated over 2-3 days).

individual skills/steps of the competency.	Underneath each competency, there is a skills box. Notice that you can click on the drop- down arrow next to skills to see all of the skills/steps that should be validated by the coach when validating a competency. Whatever validation method, rating, and validation date you selected above at the competency level will also populate for each skill that falls beneath the competency (designed to make competency documentation quicker). However, you may need to make some changes. Encourage your coaches to review each skill when validating competencies and make any needed changes to validation method, rating, and validation date. It is very possible that some of the skills were validated on different days using different validation methods. If the validation method is a training certificate or paper checklist, it can be uploaded as learner evidence.



If using learner evidence as validation method . .	Select upload learner evidence (blue box at bottom of skill, underneath available validation methods) You can either drag and drop files into the box or click once in the box to search for files on your computer and upload	
Add comments, remedial actions or review history, if needed	Make appropriate selection and document accordingly Comments can be used to document Patient MR# If “not competent” was documented, select remedial	

	actions and document accordingly	
Once all fields have been completed, go back to the top of the page	Click on the blue validate button to document/finalize competency validation	
If you have any questions	Please Contact Lakecia Woody, HealthCare Source **COMPETENCY** Administrator	Lakecia.woody@eamc.org 334-528-1232