Faculty Guide to Clinical Experiences

Please note that the screenshots displayed in this guide may appear slightly different depending on your school’s licensing of ProjectConcert and your individual access rights.

1. Login to ProjectConcert account at https://secure.projectconcert.com/uthscsa

2. After you have logged in, you will be directed to the Welcome page.

3. As a Faculty member or Preceptor, there are two links that are used in Clinical Experience tracking:

   - **Approve** Allows you to view, approve, or reject clinical experiences.
   - **Experience** Allows you to generate reports.
**View/Approve/Reject Clinical Experiences:**

This is where you can view and approve your students’ time or clinical encounters.

1. Begin by clicking **Approve**.

   By default, the Queue screen will appear.

   All clinical experiences that are in “pending” status will appear in your Queue screen (as shown here):

2. Select the clinical experience that you want to...
   - **View**: Clicking this button allows you to open the log, make comments (optional) and reject or approve the experience.
   - **Approve**: Clicking this button changes the status IMMEDIATELY to approved and no changes can be made.
   - **Reject**: Clicking this button changes the status IMMEDIATELY to rejected and returns it back to student.

**Note:** To approve/reject multiple clinical experiences at one time, click the Select option or individually check the boxes under the Select column and then click the Approve or Reject button.
Revise a Clinical Experience

Note: Once an experience is marked “Approved,” it cannot be edited by faculty or student. It can, however, be REVISED back to “Pending” status by the faculty/supervisor/preceptor for the student to return to make edits and resubmit.

1. Click Revise under Approve and this page will appear.

2. As you will see, there are several filters to select from:
   - Student – Only students that have selected you as their supervisor will appear in this list
   - Date – Optional
   - Status – Select Approved, Pending or both

3. Click Filter.

4. A list of all of the experiences that apply to your filter criteria will be listed (as shown below).
5. Click View to preview the experience before reversing the status or simply click Reverse.

6. Once you click Reverse, the experience is no longer in your queue and is sent back to the student to make changes.

Note: Edits to a clinical experience entry must be done by the student. A Preceptor or Faculty can only change/reverse the status of the experience so that the student is able to make changes on their side.
Generating **Requirement** report on clinical experiences:

This report provides information on your students and the number of diagnoses or procedures that have been met or how many are needed to fulfill their requirements.

1. Click **Requirement** under

![Image of ProjectConcert interface]

2. As you will see, there are several filters to select from:
   - Program
   - Diagnosis
   - Procedures
   - Show Competencies
   - Show Inactive
   - Select all or Unselect All

3. Click **Generate**.

4. The Requirement Report will be displayed in a table (as shown on the next page) with the students selected above.
5. The Diagnosis or Procedures will appear across the top. The number (x) defines the **required** number of Diagnoses or Procedures that the students are required to meet.

6. Click Export to Excel to save to your computer or return to selection criteria to generate a new report.
Generating a **Summary** report on clinical experiences:

1. Click **Summary** under

   ![Image of ProjectConcert interface]

   - Start Date: Enter a date range or leave blank for ALL experiences
   - End Date: Enter a date range or leave blank for ALL experiences
   - Status: Check all (3) boxes to include ALL experiences
   - Programs, Students, Supervisors, Details, Procedures, Diagnosis

2. As you see, you can now select/enter the filter criteria to generate your report:
   - Enter a date range or leave blank for ALL experiences
   - Select the Status experiences to include in the Summary *(Approved, Pending and/or Rejected)*
     - Check all (3) boxes to include ALL experiences
   - Click through EACH tab *(Programs, Supervisors, Details, Procedures, Diagnosis)* to select the information to include in the Summary Report.
     - By default, all “Programs, Supervisors and active Details” will be checked.

3. Once all your selections are made, click the **Generate** button.
Sample Summary Report:

![Sample Summary Report](image)

**Important Notes:**

- Scroll down or use your arrow keys to view the entire report
- Location of Print, Save, etc. vary depending on your browser (IE, Firefox, Google Chrome, etc.)
- At the top left of the screen there are additional options that allow you to change the display of the report
  - **Report:** This option produces a .pdf report (as shown above)
  - **Spreadsheet:** This option produces the information in a table and can be exported to Excel.
Spreadsheet Example:

Important Notes:

- Scroll to the right to see all your selected details.
- Click [Export to Excel] to save to your computer.