

# HOW-TO: NAVIGATE THE PORTAL- INSPECTOR TRAINEE GUIDE

**FOR:** Inspector Trainees

**DESCRIPTION:** Overview of items only applicable to the Inspector Trainee(s).

**DEFINITIONS:** NA

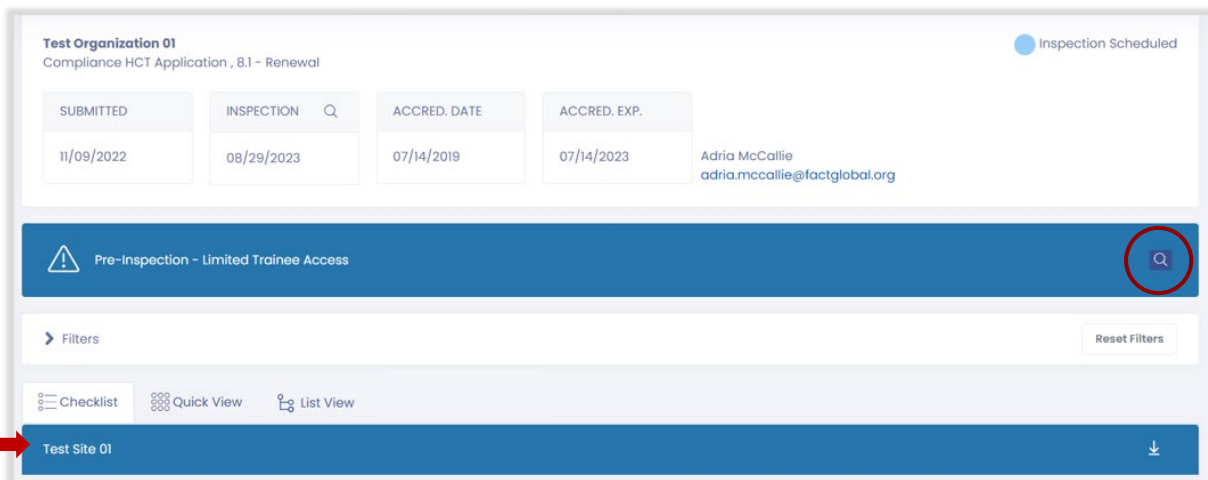
**PREREQUISITES:**

- You must be assigned as an inspector trainee to an organization in the FACT Accreditation Portal.
- Review the following guides:
  - [How-To: Log In](#), IT.GDE.8.003
  - [How-To: Navigate the Portal \(Applicant\)](#), IT.GDE.8.004
  - [How-To: Navigate the Portal-Inspector Guide](#), IT.GDE.8.026
  - [How-To: Complete An Inspection](#), IT.GDE.8.027

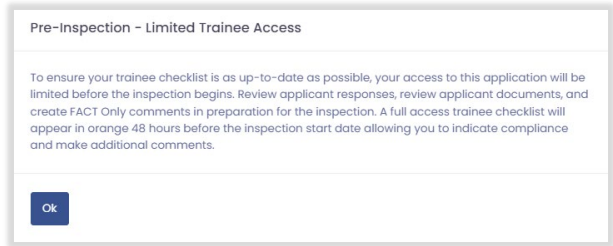
**PROCESS:**

**Pre-Inspection**

1. Trainees are provided the checklist(s) in two stages:
  - a. The Mentor’s checklist, with limited trainee access, is available until 48 hours prior to the inspection.
  - b. An orange trainee checklist becomes available 48 hours prior to the inspection; the blue checklist no longer displays.



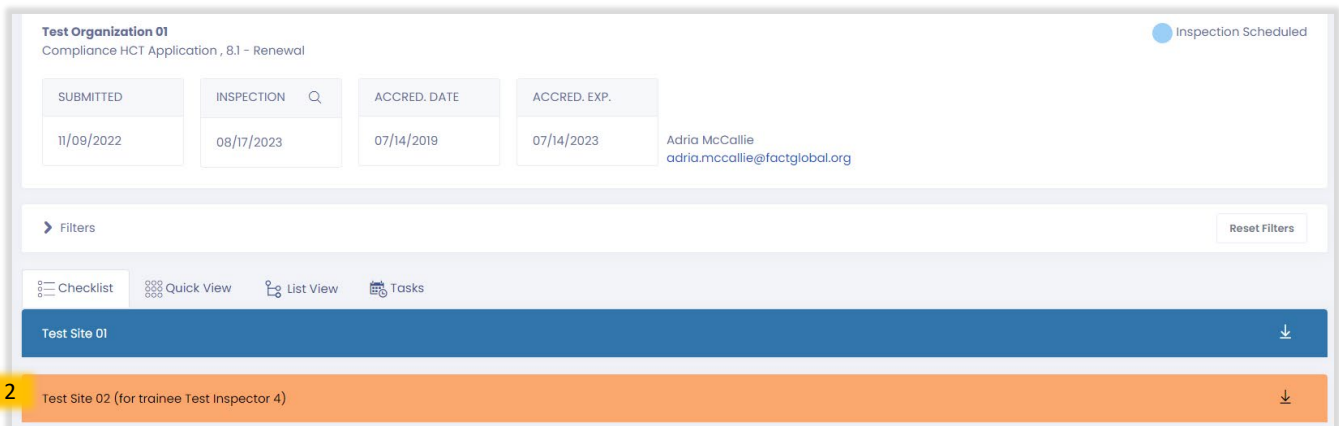
- c. Select the magnifying glass for an instructional window to display.
- d. Perform the following to prepare for the inspection:
  - i. Review applicant responses
  - ii. Review applicant documents
  - iii. Create *FACT Only* comments



*Note: Other comment types are not available at this time.*

2. Forty-eight (48) hours prior to the inspection start date, an orange checklist displays for the trainee. The Mentor’s checklist no longer displays. The trainee may continue to add *FACT Only* comments along with all other comment types.

*Note: FACT Only comments entered in the Mentor’s checklist will display in the orange trainee checklist.*



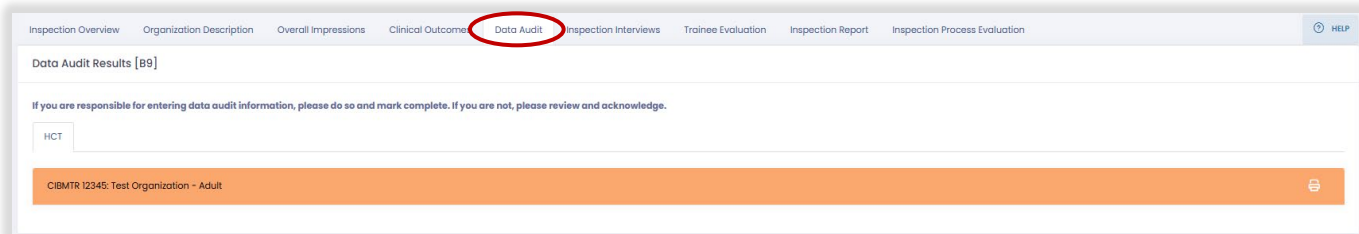
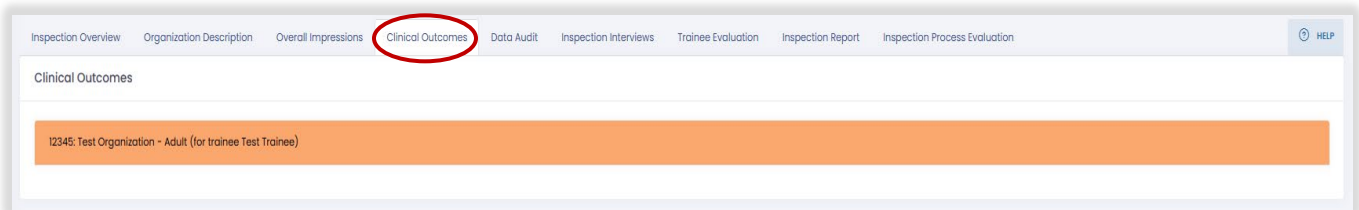
3. Select **Inspection** from the left navigation pane.
4. The *Inspection Overview* page displays and includes a ribbon with items that must be reviewed and completed.
  - a. Refer to the [How-To: Complete An Inspection](#) guide that provides detailed instructions on completing the items in the ribbon: *Complete the Site Checklist, Update the Organization Description, Enter Overall Impressions, Review Clinical Outcomes* and *Review Data Audits* (for Clinical sites), *Document Inspection Interviews*, and *Complete your Inspection*.
  - b. *Overall Impressions, Clinical Outcomes, and Data Audit* include an orange row for the trainee. For details on how to complete the sections, refer to the [How-To: Complete An Inspection](#) guide.

*Note: the Mentor’s entries for Overall Impressions, Clinical Outcomes, and Data Audit are not accessible at this stage.*

- i. *Overall Impressions* tab.



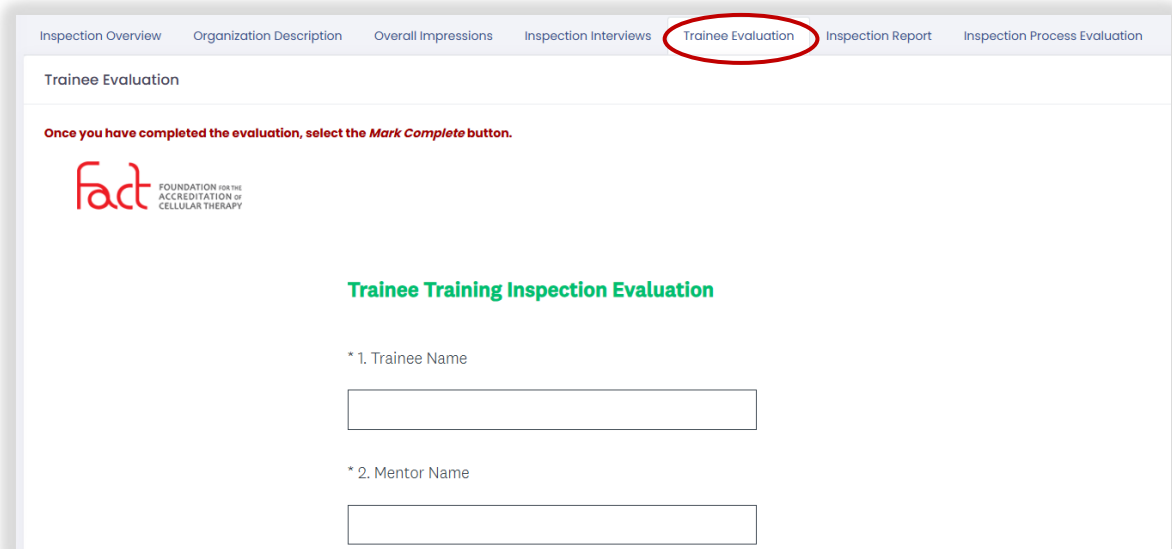
- ii. If a trainee is affiliated with a Clinical Program site, there will be areas to complete in the *Clinical Outcomes* and *Data Audit* tabs.



5. Complete the *Trainee Training Inspection Evaluation*. Refer to <https://www.surveymonkey.com/r/VV8BRXL> (this is accessible in the portal).

*Note: Complete the evaluation when the inspection report is finished. Do not navigate to other windows until the evaluation is complete as responses will not be saved.*

- a. Select **Trainee Evaluation**. The *Trainee Evaluation* window displays and includes the *Trainee Training Inspection Evaluation*
- b. Complete the evaluation.
- c. Select **Done** then **Mark Complete**.
- d. Once complete, a green checkmark will display in front of the tab and the ribbon arrow color will change from yellow to green.



6. After the trainee's inspection report is finalized, the *Mentor's checklist*, *Overall Impressions*, *Clinical Outcomes* (for Clinical trainees only), and *Data Audit* (for Clinical trainees only) entries will be visible.