How to get started with EQUIP

A short step-by-step Guide

1. Registration

Welcome to EQUIP! Before getting started, you will need to create an account on the EQUIP platform.

- ☐ Go to https://equipcompetency.org/en-gb/user/register to create an account[1]
- ☐ Provide your name and email address, create a password and register.
- ☐ You will receive an email from EQUIP to confirm your email address. Once you click **confirm**, you are taken to the EQUIP home page. To learn more about EQUIP and how to start using the platform, select **getting started** and follow the module **Getting Started with Digital EQUIP.**

2. Setting up

The following steps are to be taken by the ***team administrator***. The team administrator is any person responsible for setting up the trainings on the platform and inviting all team members to take part in those trainings. This person should be familiar with **Competency-based training** and the different **competency assessment tools**. If you have been appointed team administrator and are not yet familiar with these, please take the relevant course first by following the link.

Now it's time to start setting up your team!

Creating a team

Before creating a training, first you need to create a team. A team can be an organisation, a project or a group of people that will use EQUIP trainings and assessment tools.

- ☐ On the navigation bar, select **competency assessment.**
- ☐ Select **create new team.**
- ☐ Select **my team is not on EQUIP** followed by **create new team**
- ☐ Enter a name for your team and click **next**.
- ☐ Enter the email addresses of people you'd like to add to your training and select **send invite**. They will receive an email invitation to join the team and will need to create an account[2].

Now that you have created your team, it is time to create your first training!

[1] To use the EQUIP platform and e-learning registration is required.

[2] Invite only people involved in conducting the training. Trainees do *not* need to register.

Creating a training

- To create a new training, go to the **admin dashboard** and click **add training**

> *The **admin dashboard** is important as from here you will be able to add and edit trainings, invite new team members and view assessment submissions.*

Step 1

- Fill out the title and starting date of the planned training.
- Select the main *competency tool* you want to use to assess the trainees. It is possible to select one or more *accompanying tools* to use in addition to your main tool.

Step 2

Add the team members that will take part on this training and assign them their respective roles.

- Click **add trainers** and click **search for existing team members**. Select the person(s) you would like to add as trainers and click **add to training**.
- Click **add raters** and click **search for existing team members**. Select the person(s) you would like to add as rater and click **add to training**. Note: The same person can play trainer or rater at the same time[3].

Step 3

- Add the list of trainees to assess. Select **add new trainee**. Enter their full name and click **create trainee.**
- Make sure to save your training by selecting **save training**.

NOTE: Leave the *admin dashboard* by clicking **Exit admin dashboard** which brings you back to the *competency assessment* page.

3. Using EQUIP competency assessment

NOTE: The following steps are relevant for trainers and raters!

Select **e-learning** followed by **for trainers** and select the course **How to use the digital EQUIP platform**. **Make sure to follow this course before you continue with the next steps**.

It's time to carry out your first competency assessment!

Using the competency assessment tool

- To access the assessment tool, click on **competency assessment** on the navigation menu. You will then see your training dashboard with your available trainings for each team you are part of.

[3] Learn more about Types of roles in EQUIP.

- Select your training and you will see the available *competency tools* to assess on the top left corner; the *list of trainees* to assess for that training; and the status for the optional phases of assessment.
- To start assessing a trainee, look for the trainee's name, click **assess** and choose the phase of assessment that you are about to assess.
- You will now see an assessment sheet that you will use as you watch the trainee play the helper role in a role-play.
- Select the level and attributes observed for each competency by ticking the most relevant box(es).
- While evaluating a trainee, the assessment is automatically saved to your device as a draft. Once you finish your assessment, on the top right **select the actor** and then click **submit assessment**[4].

Training results and reports

Once *raters* have submitted their assessments, trainers will be able to see each trainee's results.

- Select your training and you will see the *list of trainees* and the *status of the assessment*.

View individual results

- Click on the **name of a trainee** to see a General Summary of their individual results. The General Summary will give you an **overview of the trainee's scores during the training.** *You can use this overview to check the trainee's progress through assessment phases and if their competencies are improving.*
- When there are multiple raters, the first column will display the **Summary Mode**, **with the mode scores of all raters for each competency.** We recommend using the Summary mode column to give feedback to trainees and using the raters' columns to check for consistency between raters and review their inter-rater reliability (IRR).
- If a rater has submitted a score of 1 in a competency, an information icon is displayed to give you more information so you can review the specifics of the harmful behaviours noted.

View group results

- On the Trainee's list page, click **TRAINING RESULTS** to download the whole training group's results. You will first access the summary of results for the whole training. Use this graph to see training progress.
- Move between the tabs to select the various *phases of assessment*, you will be able to see detailed group results for that specific phase and download its results.

Congratulations, you have successfully assessed the competencies of your trainees by using EQUIP!

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[4] Note that *Submit Assessment* will only available when online, we explain in more detail how to use the tool offline in the Working offline module.