



First Activity Assessment and In-Office Check (IOC) Quick Guide

After the First Meeting

- You may log in as staff and check the progress of your client's progress completing activities before the first meeting, but this is not required.
- You may wish to contact your client before the activity due date to
 - Remind them of the activity submission due date
 - Reinforce the expectation that all activities should be completed by the due date
 - Recognize the work done so far and encourage the client
 - Remind client that the "reflection" activity must be addressed at the end of the first attempt of each competency area.
- When the client submits the completed activities, you will receive an automatic email notification that the area has been submitted. Assessors and portfolio reviewers default to "opt in" on email notification of submitted work, but may choose to "opt out" by going to mynedp.org -> Staff -> Update and selecting **opt out** of the notification.
- Clients should always have something to work on, so be sure to open a new competency area or release results of previously assessed work so the client can work on post-task assessment (reattempted client work). Clients may also work on their College and Career Competency at any point during Generalized Assessment.

Assessing Client Work

Within one week of activity submission

- Assess all scored activities in the competency area
- Leave useful procedural notes for client on ND answers
- Release results of the area using the "release results" button at the bottom of the competency area.
- Schedule the IOC for a few days to a week after the release of results, with the expectation that the client will need a few days review the results of their work to prepare for the IOC.

Before the First In-Office Check

The day of your first IOC with a new Assessment client,

- Be sure you have a secure, quiet location for the meeting, a dedicated computer for the IOC with strong internet connection, and microphone and speakers.
- For an in-person IOC, test audio by logging in as staff and clicking **Test Audio** on the home screen to record and listen to the recording.
- Recommended: identify something you can work on while proctoring the written IOCs. You or another proctor must be in the room with the client during the IOC, but it is an efficient use of your time if you have something else to work on while proctoring. This could be an opportunity to evaluate or review other client work on another computer – just be sure the IOC client can't see your screen, but you can see theirs.

The First IOC Meeting

In an in-person IOC:

- Assessor logs in as staff and selects **Clients**,
- select **IOC** mode for your client. This opens the system in a “safe mode” that prevents the client from accessing the Activities. DO NOT use the evaluation mode to conduct IOCs,

In a remote IOC:

- Meet over a remote platform like Zoom or Google Meet,
- The client will share their screen and keep their camera on and mic unmuted through the IOC – the assessor should turn off their camera and mute their mic once the client begins working on written IOCs,
- Client logs in to mynedp.org,
- Assessor logs in as staff and selects **Clients**,
- Assessor finds client and clicks **Remote IOC**,
- Assessor confirms on pop-up screen that they want to start the IOC,
- Client confirms on pop-up screen on their account that the assessor has started the IOC,
- Assessor clicks **Remote IOC** to end the IOC at the conclusion of the IOC.

In face-to-face or remote IOC

- the client is expected to complete **all** of the IOCs within a competency area-- in this case, all of the IOCs within Health Literacy-- during this meeting,
- for oral IOCs, be sure to record yourself asking the questions along with the client answers. It is not necessary to record yourself reading the “script” or instructions,
- proctor the client as they complete the written IOCs, ensuring that they are not leaving the IOC page or using notes brought into the meeting.

In-Office Check Tips

- IOCs may be completed in any order, with the exception of the 21st Century Workplace competency area, in which IOCs must be completed in order,
- Clients may progress from one written IOC to another, or the Assessor or proctor can navigate to each one,
- Clients are NOT permitted to bring any notes or materials into the IOCs unless the IOC instructions specifically allow this,
- Clients may make notes during the IOC, either before or after the questions have been asked, to work out answers or compose an oral IOC response. Any notes clients create during the IOC must be destroyed at the conclusion of the session,
- Assessors and other proctors are allowed to answer procedural questions, e.g. “How do I know if my work is saved?” or “Can I look at my answers in the Activity?”
- Assessors and other proctors may not answer content questions, e.g. “Is this correct?” or “What does this mean?”

Concluding the First In-Office Check

- Be sure IOCs are saved and submitted (using buttons at the bottom of each IOC)
- Since **IOC** is a protected mode, the Assessor will have to log out and log back in to open the next competency area or navigate to any other place in the system
- Go to the **Competency Areas** button for your client and check the box next to Cultural Literacy to give the client access. The client may not select a different area; competency areas must be opened in the order listed in the program.
- Remind the client that along with this Cultural Literacy, they can work on the College and Career Competency
- Let your client know that while they are working on Cultural Literacy, you'll be evaluating the IOCs in Health Literacy, and will have results of this area the next time you meet.
- Set a due date for Cultural Literacy activity submission within 1 – 2 weeks. It is **NOT** recommended that you tell the client to contact you when the area is finished. Setting the due date now and at each subsequent meeting will assist your client in managing his/her time and progressing through the program.
- **BEST PRACTICE ALERT:** some assessors like to have standing weekly or bi-weekly appointments set with their clients. This practice can encourage client persistence and progress.