



ACA Course Management System
Release Bulletin No. 6 – Candidate Evaluations
November 2, 2023

This bulletin covers recently implemented changes to the Course Management System (CMS) designed to simplify candidate evaluations.

Highlights

- Checklist format – the number of checklist columns in a candidate evaluation have been reduced from seven to two (three if a criteria is optional).
- Section comments – required if any criteria within a section is scored as “Below Standard”.
- Summary comments – are still required.
- Summary evaluation results – options have been expanded to provide evaluators with greater flexibility in awarding overall results.
- Evaluation templates – have been modified to support optional criteria and future analytical reporting.
- Implementation – the new evaluation features will be implemented automatically on November 2, 2023. The new evaluation templates will have an effective date of January 1, 2024 to provide disciplines with time to flag selected evaluation criteria as optional.

Checklist Format

Candidate evaluation checklists have been simplified by dropping the following columns:

- Teaching Topic – Formal
- Teaching Topic – Impromptu
- Relative to Expectations – Exceeds
- Relative to Expectations – Developing
- Relative to Expectations - Continued

The following columns have been renamed or changed:

- Meets Expectations has been renamed “Meets Standard”
- “Below Standard” has been added and may mean needs improvement, continued or unsuccessful depending on an evaluation’s overall result (see below)
- Not Observed – will only be available as a choice if a criteria has been flagged as optional by a discipline on a candidate evaluation template (see below). In the past, any criteria could be scored as Not Observed, but this option is now more limited.

See Appendix A for the revised evaluation format.

Section Comments

Section comments are now mandatory, if any criteria within the section is scored as “Below Standard”. Otherwise, section comments are optional. If one or more criteria in a section is scored as “Below Standard” and one of the overall evaluation results is Continued, the section comments will be included in the continuation form.

Summary Comments

The following three narrative boxes at the end of an evaluation require a response:

- Areas of Proficiency
- Areas Needing Improvement
- General Observations

This requirement is unchanged.

Summary Evaluation Results

Result Options – The options available now for summary evaluation results are similar to past options, but have changed due to the changes in criteria scoring.

- Passed – This result will be an option even if one or more criteria are scored as “Below Standard”.
- Continued – This result will be an option if one or more criteria are scored as “Below Standard”. All criteria scored as “Below Standard” will assume to be continued and included in a continuation form.
- Unsuccessful (renamed from Failed) – This result will be an option if one or more criteria are scored as “Below Standard”.

Multiple Levels – For candidates eligible for results at multiple levels, the CMS continues to support this flexibility, but now with expanded options. For example, in an L3 course, a candidate with no certifications and some “Below Standard” criteria scores can receive any of the following:

- Unsuccessful at L2, no result allowed at L3
- Continued at L2, no result allowed at L3
- Passed at L2, Unsuccessful at L3 (or no result at L3)
- Passed at L2, Continued at L3
- Passed at L3

Note that if a lower level result is scored as Continued or Unsuccessful, a higher level result is not allowed.

Upgrades – If an existing instructor receives a “Below Standard” score for one or more criteria, the overall result at the higher upgrade level can be Passed, Continued or Unsuccessful. If Continued or Unsuccessful at the higher level, the instructor can still be Updated at the current level of certification at the IT’s/ITE’s discretion. There is no negative impact on an existing certification, if an upgrade is Continued or Unsuccessful. Also, instructor certifications cannot be downgraded through the online evaluation process.

Updates – if an existing instructor receives a “Below Standard” score for one or more criteria during an update course, a Passed result is still an option. Continuations are not allowed for updates. As noted above, instructors cannot be downgraded through the online evaluation process.

Assessments – Passed and Unsuccessful are the only result options available for Assessments. If one or more criteria are scored as “Below Standard”, a Passed result is still an option.

Note: While some of the new logic may seem complex, it is handled “behind the scenes” by the CMS.

Candidate Evaluation Templates



The revised candidate evaluation logic described in this bulletin and future analytical reporting have required changes in the CMS candidate evaluation templates. These changes are described below. Note that none of these changes require changes be made by disciplines to template content. The changes just provide disciplines with new options.

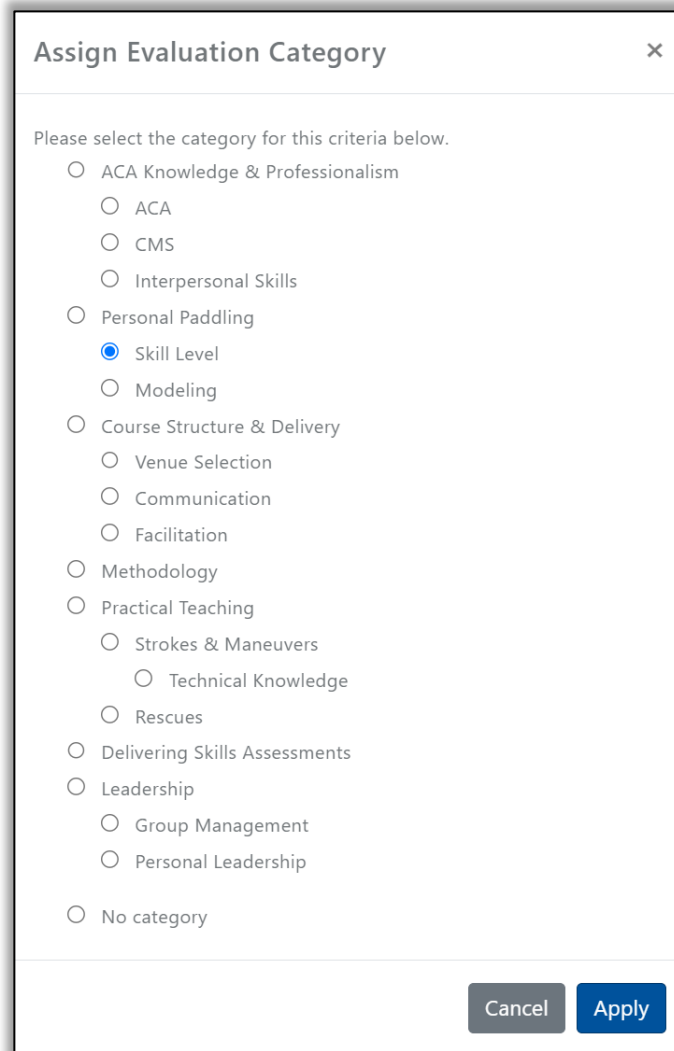
When creating or editing evaluation criteria in a template, the following fields have been added to support optional content (or in one case a field has been dropped):

- **Criteria ID** – dropped, no longer required
- **Criteria Description** – no change from current requirement
- **Optional Checkbox** – It is now possible to flag an evaluation criteria as optional, meaning that an evaluation of that criteria is not required. “Not Observed” will appear on the evaluation form as an additional scoring choice. The default value for this checkbox field on an evaluation template is unchanged

Move	Title/Description	Optional	Actions
	Communication and signaling (VHF protocol, pyrotechnics/smoke, etc.)	<input type="checkbox"/>	
	Situational awareness	<input checked="" type="checkbox"/>	
	Appropriate leadership, judgement and group management	<input type="checkbox"/>	
	Avoidance, assessment and management of minor injuries	<input type="checkbox"/>	
	Avoidance, assessment and management of cold water shock, hypo/hyperthermia	<input type="checkbox"/>	

[Add Criteria](#)

- Actions, Inactive (eye icon, ) – an evaluation criteria can be flagged as “inactive”, meaning the evaluation criteria should not appear on evaluations. For history purposes, the criteria is retained in the CMS database.
- Action, Category (file folder icon – ) each criteria in an evaluation checklist can be categorized for use later in analytical reporting by clicking the file folder icon. Categories will be determined by the SEIC and recorded in a Policy Table maintained by the SEI Department staff. Evaluation criteria with no category assigned will have an empty file folder icon, that is just a folder outline. Evaluation criteria with a category assigned will have a filled in folder icon. Clicking on the folder icon will allow a category to be assigned or changed. Potential categories might include the following:



The image shows a modal dialog box titled "Assign Evaluation Category" with a close button (X) in the top right corner. Inside the dialog, there is a prompt: "Please select the category for this criteria below." Below the prompt is a list of radio button options. The "Skill Level" option is selected, indicated by a blue dot. At the bottom right of the dialog are two buttons: "Cancel" and "Apply".

Assign Evaluation Category

Please select the category for this criteria below.

- ☐ ACA Knowledge & Professionalism
 - ☐ ACA
 - ☐ CMS
 - ☐ Interpersonal Skills
- ☐ Personal Paddling
 - ☒ Skill Level
 - ☐ Modeling
- ☐ Course Structure & Delivery
 - ☐ Venue Selection
 - ☐ Communication
 - ☐ Facilitation
- ☐ Methodology
- ☐ Practical Teaching
 - ☐ Strokes & Maneuvers
 - ☐ Technical Knowledge
 - ☐ Rescues
- ☐ Delivering Skills Assessments
- ☐ Leadership
 - ☐ Group Management
 - ☐ Personal Leadership
- ☐ No category

Cancel Apply

Evaluation criteria categories do not appear on evaluation forms or otherwise complicate the evaluation process. The only impact is on evaluation template maintenance which is usually assigned to a select few within a discipline. Category assignments are optional, but will make evaluation performance and trend reporting more meaningful when the reports become available.

If a category is used in any template, it cannot be deleted from the Policy Table, but its description for reporting purposes can be edited. New categories can always be added. The function used to create categories includes small pop-up windows to describe the appropriate use of each category.

Active and expired evaluation templates, which are not normally editable, are now editable solely for the purpose of allowing the assignment of criteria categories. This feature will allow the reporting of evaluation history prior to these CMS updates.

Candidate Evaluation Template Listings – To simplify template listings and make them more relevant, the following changes have been made:

- The default filter for template listings now includes active templates only. Expired templates and templates that will be active in the future are not included.
- The checkbox filter, “Include Inactive Templates”, is now used to include expired templates and templates that will be active in the future. If the “Include Inactive Templates” box is checked, expired and future templates will be included. See the image below.

☒ Include Inactive Templates

Discipline: Stand Up Paddleboard (SUP) ▼






Find: I3

Search

Template		Actions
Application	Effective Date	
General	⚠ 08/05/2020	📄 📁 👁 📁
General	09/18/2023	📄 📁 👁 📁
General	🕒 10/31/2023	📄 📁 ✎ 🗑
General	08/05/2020	📄 📁 👁 📁
General	🕒 10/31/2023	📄 📁 ✎ 🗑
General	08/05/2020	📄 📁 👁 📁
General	🕒 10/31/2023	📄 📁 ✎ 🗑
General	07/08/2020	📄 📁 👁 📁
Instructor Trainer Candidate	⚠ 07/08/2020	📄 📁 👁 📁
Instructor Trainer Candidate	09/16/2023	📄 📁 👁 📁






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- Expired templates are now flagged when included in a template listing with a triangle and exclamation mark (!) icon.

Template		
Application	Effective Date	Actions
General	 08/05/2020	   

Moving your cursor over the expired icon will produce the image above.

- Any templates that are not yet active because they have a future effective date are now flagged with a clock icon.

Template		
Application	Effective Date	Actions
General	 10/31/2023	   

Moving your cursor over the not yet active clock icon will produce the image above.

- A Search button has been added so that queries are not initiated automatically when any filter criteria is changed. The Search button must now be selected to initiate a search whenever listing filters are changed. See the image on the previous page.
- Filter selections (Discipline, Find and expired inclusion) are now saved between queries for each CMS user. If the same device is used (e.g. laptop or smartphone), filter selections will be saved between online sessions even if there are multiple days between queries.

Implementation

The new candidate evaluation formatting and templates will become effective on January 1, 2024. Courses begun on or after this effective date will follow the new simplified formatting. Courses started before this date will follow the previous format.

In implementing the new evaluation templates, copies of all templates active on November 2, 2023 will be copied automatically to the new format in the CMS database with an effective date of January 1, 2024. The new templates will have space for category assignments and optional criteria flags. Categories will be blank initially and “Optional” criteria checkboxes will be unchecked, that is all criteria will be required initially. The new CMS features will then allow disciplines to assign categories to evaluation criteria and select the “Optional” checkboxes, where appropriate.

Between November 2, 2023 and January 1, 2024 all newly formatted templates will be available for edits. Templates with effective dates after January 1, 20024 will also be available for edits until the day they become effective. That is, individual evaluation criteria can be added, deleted, changed or flagged as optional.

Contacts

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Appendix A – Revised Candidate Evaluation Format

The revised candidate evaluation form will look like the sample below.

- The top section is filled in automatically by the CMS from the Course Registration and Course Roster. The exception is the “Other” field which is optional and can be used to add any relevant comments including candidate background and goals.
- The end of the evaluation form with overall results is unchanged, except that evaluation result options have been expanded.

Discipline	Coastal Kayak		
Course Abbreviation	CK	Course Name	Coastal Kayaking
Course Type	ICE	Level	L3
Course Start Date	10/23/2023	Application	General
Candidate Number	10801676	Candidate Name	John Traendly

Venue Elements	Description	Actual
Condition 1:		
Other		

Add Condition

ACA Knowledge	Meets Standard	Below Standard
General knowledge of paddlesports and the ACA	<input type="radio"/>	<input type="radio"/>
Demonstrates how to register and report a course (with and without insurance)	<input type="radio"/>	<input type="radio"/>
Demonstrates an understanding of the ACA Waiver and Release of Liability	<input type="radio"/>	<input type="radio"/>

Comment

Teaching/Instructing/Coaching	Meets Standard	Below Standard	Not Observed
Teaching theory	<input type="radio"/>	<input type="radio"/>	
Differentiation of instruction based on individual learner	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Use of appropriate skills progression	<input type="radio"/>	<input type="radio"/>	
Selection of appropriate teaching venue based on ability and desire outcomes	<input type="radio"/>	<input type="radio"/>	
Focus is on core principles rather than specific technique	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Appropriate, specific and meaningful feedback	<input type="radio"/>	<input type="radio"/>	
Appropriate modeling of strokes, maneuvers and rescues	<input type="radio"/>	<input type="radio"/>	
Interpersonal skills	<input type="radio"/>	<input type="radio"/>	
On-land presentations	<input type="radio"/>	<input type="radio"/>	
On-water presentations	<input type="radio"/>	<input type="radio"/>	
Organization and management	<input type="radio"/>	<input type="radio"/>	

Comment