

HOW TO VIEW TRAINEE PROGRESS – EPA DASHBOARD BREAKDOWN

**TARGET AUDIENCE: PROGRAM DIRECTORS, PROGRAM ADMINISTRATORS, COMMITTEE MEMBERS AND
ACADEMIC COACHES**

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HOW THE CBME DASHBOARD PERCENTAGES PROGRESS

The Stage, EPAs and EPA Requirements will appear on the dashboard in a hierarchy and each will display a percentage of completion. The number of attempts indicates how many forms have been completed for the EPA.

Requirements	Program Assessment	Individual Assessment	Attempts	Attempt Breakdown	Status
Stage 1 - Transition to Discipline ← Stage 48% ← Percentage of Completion					In Progress
INITIAL MANAGEMENT ← EPA 33% ← Percentage of Completion 5 ← # of forms completed for this EPA			5	0 1 0 1 3	In Progress
Collect 2 observations of achievement ← Requirement 50% ← Percentage of Completion	50%				
At least 2 different observers	50%				
At least 1 direct observation	0%				
INITIATING RESUSCITATION 50% ← Percentage of Completion 5 ← # of forms completed for this EPA			5	0 0 1 1 3	In Progress
Collect 2 observations of achievement	100%				
At least 2 different observers	50%				
At least 1 clinical encounter	0%				

Attempt Breakdown

The Attempt Breakdown column is a representation of the Entrustment Scale and displays a summary of how many forms were completed for each score on the scale.

Entrustment Scale:



Royal College Forms 1 and 2

For EPAs that use Royal College forms 1 and 2, the requirement percentages progress when a trainee receives a perfect score on the overall entrustment scale on an assessment form associated with that requirement (5/5 or ‘I didn’t need to be there’). The percentage of completion of the EPA is calculated based on the combined percentage of completion of all the requirements for that EPA. The percentage of completion of a stage is calculated based on the combined percentage of completion of all the EPAs within that stage.

Requirements	Program Assessment	Individual Assessment	Attempts	Attempt Breakdown	Status
▼ Stage 1 - Transition to Discipline	48%				In Progress
▼ INITIAL MANAGEMENT	33%		5	0 1 0 1 3	In Progress
Collect 2 observations of achievement	50%				
At least 2 different observers	50%				
At least 1 direct observation	0%				
▼ INITIATING RESUSCITATION	50%		5	0 0 1 1 3	In Progress
Collect 2 observations of achievement	100%				
At least 2 different observers	50%				
At least 1 clinical encounter	0%				

Requirement percentages roll up to EPAs

EPA percentages roll up to the Stages

Requirements will only progress when you receive a 5/5 on the assessment form

External Requirements

Some programs have requirements that the system is currently unable to calculate a percentage of completion for. These include external requirements (submission or reports, logbooks, certificates etc.) as well as more complex advanced query requirements.

In both instances, a manual toggle switch has been implemented. When the requirement has been met, the trainee and/or program administrator can toggle the switch. External requirements are indicated by three asterisks “***” in front of the requirement.

Hover over the requirement, click the pencil edit button and fill in the appropriate details and save.

Requirements	Program Assessment	Individual Assessment	Attempts	Attempt Breakdown	Status
▶ Stage 1 - Transition to Discipline	11%				In Progress
▼ Stage 2 - Foundations of Discipline	0%				Pending
> MANAGING COMMON	0%		0	0 0 0 0 0	Pending
▼ MECHANICAL VENTILATION	0%		0	0 0 0 0 0	Pending
Collect 9 observations of achievement	0%				
At least 6 observations by attending physicians	0%				
*** At least 1 invasive ventilation for discontinuation for a patient with pulmonary reasons for respiratory support	0%				
*** At least 1 invasive ventilation for initiation for a patient with pulmonary reasons for respiratory support	0%				
*** At least 1 invasive ventilation for maintenance for a patient with pulmonary reasons for respiratory support	0%				
*** At least 1 invasive ventilation for weaning for a patient with pulmonary reasons for respiratory support	0%				
*** At least 1 non-invasive ventilation for discontinuation	0%				
*** At least 1 non-invasive ventilation for initiation	0%				
*** At least 1 non-invasive ventilation for maintenance	0%				

Add Requirement
✕

Type:

Friendly description: *** At least 1 non-invasive ventilation for initiation

I acknowledge that I have completed this requirement: Yes

Comments:

Toggle switch to Yes, enter comments and click Save

Royal College Form 3

Form 3 is intended for multi-source feedback. Currently, trainees can view the contents and evaluator for any completed MSF forms. Once policies are created at the PGME level for the distribution of MSF, more complex functionality will be implemented in MedSIS. In the meantime, MSF requirements will be treated the same as external requirements and be displayed as “*** MSF requirements met”.

Royal College Form 4

Form 4 is strictly intended for narrative use. EPAs that use Form 4 will be treated the same as external requirements.

STAGE AND EPA STATUSES

Pending – no forms have been completed.

In Progress – at least one form has been completed for the Stage or EPA.

Ready to Review – the minimum requirements for the stage or EPA have been met.

Committees/Programs will manually mark the EPA or Stage as ‘Achieved’ under the Actions column. Statuses can be overridden or rolled back. Academic Coaches and Trainees do not have access to the Actions column.

Requirements	Program Assessment	Individual Assessment	Attempts	Attempt Breakdown	Status	Actions
Stage 1 - Transition to Discipline EPA 1. INITIAL MANAGEMENT Collect 2 observations of achievement At least 2 different observers At least 1 direct observation	39%	53%	3	0 1 0 1 1	In Progress	Mark as Achieved

Program Directors, Administrators and committee members have access to manually update stage and EPA statuses

HOW TO VIEW THE HISTORY LOG OF STAGE AND EPA STATUSES

On each EPA there is a history log that will let the user know when an EPA status was updated.

Requirements	History															
Stage 1 - Transition to Discipline INITIAL MANAGEMENT Collect 2 observations of achievement At least 2 different observers At least 1 direct observation	<table border="1"> <thead> <tr> <th>Action</th> <th>Action by</th> <th>Date</th> <th>Status</th> <th>Requirements</th> </tr> </thead> <tbody> <tr> <td>Update</td> <td></td> <td>26-Jun-2019 14:36</td> <td>Achieved</td> <td>At least 2 different observers, At least 1 direct observation, Collect 2 observations of achievement</td> </tr> <tr> <td>Update</td> <td></td> <td>26-Jun-2019 14:35</td> <td>Ready for Review</td> <td>At least 2 different observers, At least 1 direct observation, Collect 2 observations of</td> </tr> </tbody> </table>	Action	Action by	Date	Status	Requirements	Update		26-Jun-2019 14:36	Achieved	At least 2 different observers, At least 1 direct observation, Collect 2 observations of achievement	Update		26-Jun-2019 14:35	Ready for Review	At least 2 different observers, At least 1 direct observation, Collect 2 observations of
Action	Action by	Date	Status	Requirements												
Update		26-Jun-2019 14:36	Achieved	At least 2 different observers, At least 1 direct observation, Collect 2 observations of achievement												
Update		26-Jun-2019 14:35	Ready for Review	At least 2 different observers, At least 1 direct observation, Collect 2 observations of												

HOW TO VIEW COMPLETED CBME FORMS FROM THE DASHBOARD

You can click on the 'Attempts', 'Attempt Breakdown' and all of the progress percentages to view the list of completed forms that contributed to that value.

The screenshot shows a dashboard with columns for Requirements, Program Assessment, Individual Assessment, Attempts, Attempt Breakdown, and Status. A pop-up window titled 'INITIAL MANAGMNT' is open, displaying a table of evaluations. The table has columns for Activity, Start Date, End Date, Assessment, Evaluator, Status, and Actions. Two entries are shown, both with a 'Completed' status. The first entry is dated 07-Jun-2019 and the second is dated 17-Apr-2019. The pop-up window also includes a search bar, a 'Showing 1 to 2 of 2 entries' indicator, and navigation buttons like 'First', 'Previous', 'Next', and 'Last'.

HOW TO VIEW THE FULL DETAILS OF AN EPA

When you hover over an EPA, an info button will appear. Click here to display additional details such as key features.

The screenshot shows a pop-up window titled 'INITIAL MANAGMNT' with a close button (X). The window contains the following information:

- Title:** Recognizing, assessing, and providing initial management for patients who are critically ill, seeking assistance when appropriate
- Key Features:**
 - This EPA focuses on the initial medical care of patients who are critically ill, including assessment, initial diagnosis, and preliminary management. An important feature of this EPA is the timely and appropriate recognition of the need for additional assistance.
 - It may include the recognition of clinical deterioration of a patient already in the intensive care unit.
 - This EPA may be observed in a variety of clinical settings, including the intensive care unit, emergency room, and on the wards.
 - This EPA does not include resuscitation (TTD2), nor developing a fully matured differential diagnosis for complex presentations, or a complete management plan (F1).

STAGE, EPA AND MILESTONE GRAPHS

For more information on the various summary graphs that can be accessed on the CBME dashboard, please see the user guide 'How to View Trainee Progress – Stage, EPA and Milestone Graphs'.

QUESTIONS?

If you have any questions or difficulties with this process, please contact MedSIS at medsis@mcmaster.ca