



# PROGRAM ADMINISTRATORS AND CBME IN ONE45

Reporting on Resident and  
Faculty Performance in CBME

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Rev. January 2020

# CBME REPORTING OPTIONS FOR PROGRAM ADMINISTRATORS

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## OVERVIEW OF REPORTING OPTIONS ON RESIDENTS

There are a variety of ways to report on resident progress with Entrustable Professional Activities (EPAs) in your Competency-based Medical Education (CBME) program. Note that some of these tools are only available to you as a program admin (PA). Please see separate guides for Competency Committee members and Residents.

These are some of the tools or strategies covered in this manual.

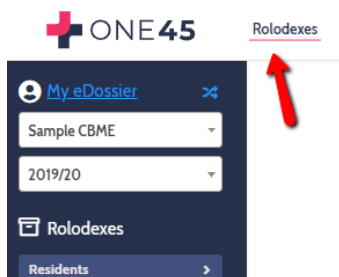
- Accessed from Resident's eDossier
  - EPA Achievement Report
  - Competency/EPA Summary Report
  - EPA Status Report
  - Assessment Count Per Competency or EPA
  - Trajectory Summary Report
  - Narrative Feedback
  - Spidergraph
- Accessed from Admin Menus
  - Form Data Export
  - Reports by Form
  - Reports by Target

## REPORTS IN RESIDENT EDOSSIER

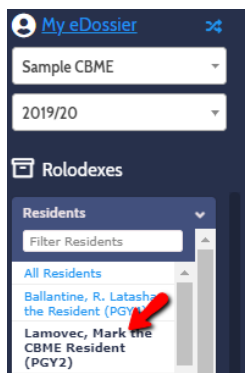
The following reports are generated from the resident's account. You would find these reports by clicking on your resident in your rolodex and then clicking *Report Center*. Committee members will have access to these reports via the mentor role, and residents have access from their own account menu.

To access a resident's *Report Center*, follow these steps:

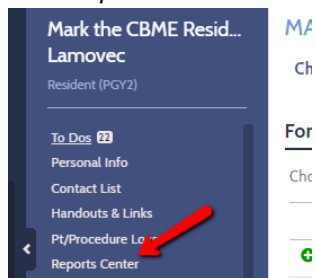
1. In your one45 account, click on *rolodexes*.



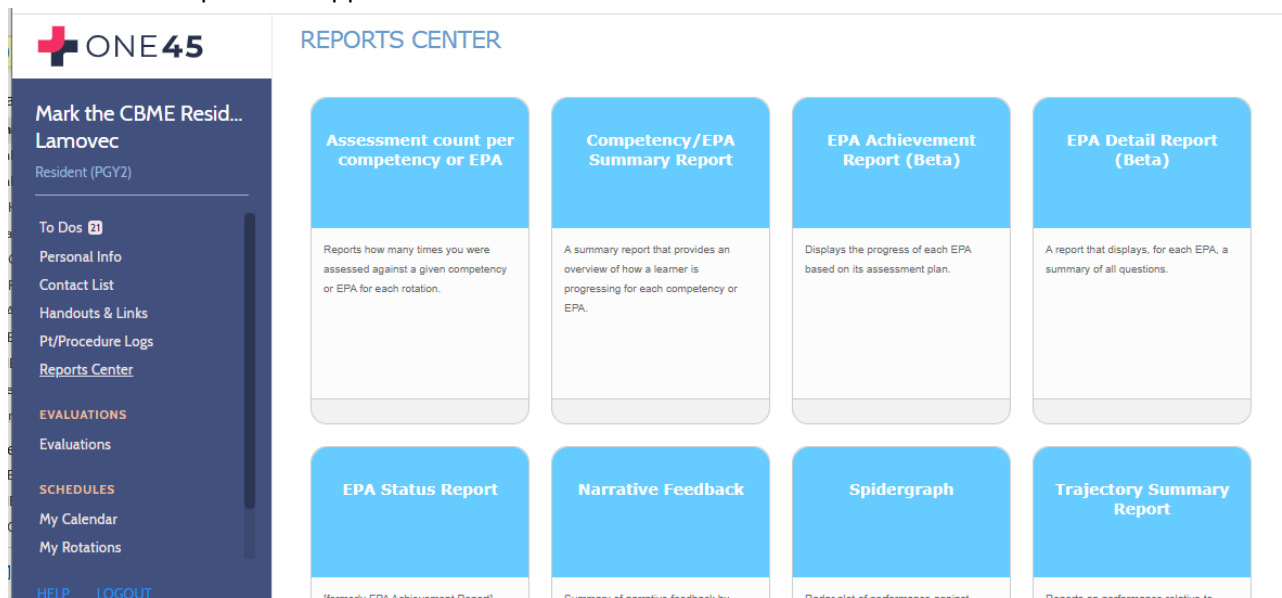
2. Click the name of a resident.



3. Click *Reports Center*.



4. A selection of reports will appear.



Proceed to learn about each report below.

## EPA Achievement Report

This will be one of the most important reports you will use. This report will help you answer questions such as:

- Did the resident achieve the minimum number of required observations of achievement?
- Did those observations of achievement also meet the other requirements of the assessment plan? For example, a department may need to know if a specific EPA had several assessors, covered required conditions, or was performed in simulation or not.
- How many times was a specific EPA triggered, completed, and closed without the preceptor completing?

Note that some details of an assessment plan cannot be met. Examples of contextual requirements that cannot be supported by the report:

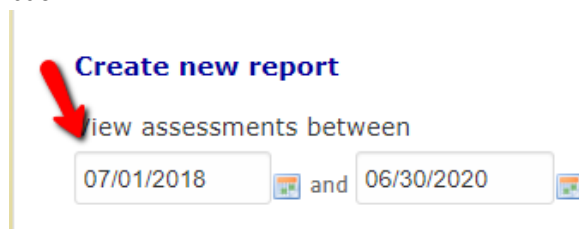
- Some EPAs ask for a “variety of hospital settings” or a “mix of conditions.” *Variety* and *mix* do not stipulate exact numbers so one45 would have no way to know if a requirement was met or not.
- Some EPAs have questions with open-ended text boxes for the answer. Again, one45 would have no idea if “Thoracic” entered as an answer and “Thoracic surgery” were the same procedure so cannot tabulate them.
- EPAs that have no overall assessment scales or don’t have five point scales won’t be pulled into the report. For example, some departments have Transition to Discipline (TTD) EPAs with an overall assessment score of *In Progress* or *Achieved*. Those EPAs will not populate in this report.

Follow the steps below to access this report.

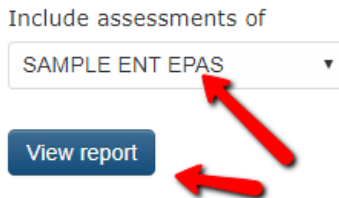
1. To begin, in your resident’s report center, click the *EPA Achievement Report (Beta)*



2. Specify the date range that covers the EPAs you wish to look at. Remember that second-year or later residents might have EPAs from stages spanning multiple years. You may need to set the start date to a year or more back.



3. Specify the mapping list you wish to use. Mapping lists contain all the EPAs you want to analyze for that resident. Some departments’ have their mapping lists divided by stage (Surgical Foundations 01 Transition to Discipline, Surgical Foundations 02 Foundations of Discipline, etc.) while others have one list for all their EPAs (All ENT EPAs). When ready, click *View report*.



4. A report will generate for all the EPAs in that mapping list. This is an overview of what it looks like.

**EPA ACHIEVEMENT REPORT**  
Displays the progress of each EPA based on its assessment plan.

**Heads up!** This report is in beta and may not be accurate. Please use caution when making judgments based on this data. Please contact us at [product@one45.com](mailto:product@one45.com) to give us your feedback on this report.

← Reports Center ⚙️ Create new report +

Print

**02FOD 01 Providing initial clinical assessment, investigation and development of a management plan for patients with acute upper airway obstruction**

EPA Status  100%

Criteria	Counted toward required observations	Required	Progress
Collect 1 observations of achievement	1	1	100%
• At least one emergent case	1	1	100%

Evaluation status	Count
Expired/deleted	0
Pending	0
Completed	3
Completed with a min. overall score of 4	2

5. Let's break it down in detail. At the top is a warning. This is a new report and might need modification as time goes on. As mentioned, some requirements are hard or impossible to tally automatically. This warning serves to warn residents and CC members not to rely ONLY on this report for determining completion of an EPA (as they should not be doing anyway).

### EPA ACHIEVEMENT REPORT (R. MARK THE RESIDENT LAMOVEC)


Displays the progress of each EPA based on its assessment plan.

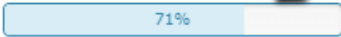

**Heads up!** This report is in beta and may not be accurate. Please use caution when making judgments based on this data. Please contact us at [product@one45.com](mailto:product@one45.com) to give us your feedback on this report.

6. You can go back to the main Reports Center menu, create a new EPA Achievement Report, or print this report to paper or pdf using these options at the top.




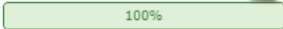

7. Each EPA will be listed along with the status of the EPA. If an EPA has not been marked as achieved by the competence committee, it will have an hourglass. The EPA status calculates the percentage of completion of that EPA. This percentage is based on how many points of achievement the resident needs but has acquired, such as specific number of observations of achievement, required procedures or conditions that occurred during that observation, etc. It will also have a button that allows you to mark it as achieved (careful, as only one45 has the power to UNDO that if a mistake is made.)

 **01TTD 01 Assessing patients with Otolaryngology-Head and Neck Surgery presentations**

EPA Status  

When an EPA has met minimum requirements but has still not been marked as achieved by committee, it will list the EPA at 100% but still have an hour glass.

 **SF1TTD-EPA 01: Performing the preoperative preparation of patients for basic surgical procedures**

EPA Status  

When it has been achieved and marked as such by the committee, it will be marked by a green check and indicate who marked it as achieved and when.

 **02FOD 01 Providing initial clinical assessment, investigation and development of a management plan for patients with acute upper airway obstruction**

EPA Status  Marked achieved by Kevin French (one45 administrator) on Feb 14, 2020

When the EPA Status section is orange, it means that something in the assessment plan could not be tallied automatically and requires individual review by the committee.

 **02FOD 04 Identifying patients presenting with an anticipated difficult airway and preparing for initial management options**

EPA Status  

Criteria	Counted toward required observations	Required	Progress
Collect 5 observations of achievement	0	5	
<ul style="list-style-type: none"> <li>Variety of procedures [requires individual review due to open-ended question]</li> </ul>	 <b>Heads up!</b> We do not currently support observation of the achievement for this requirement. You may need to manually verify the result using the EPA Detail Report.		

8. The Criteria section lists all the specific requirements for that EPA. The first criterion lists the minimum number of observations of achievement that must be obtained in order to fulfill that EPA. Some departments may determine an observation of achievement as only a 5 (*I didn't have to be there*) while most others include 4s (*I had to be there just in case*) as well.

Criteria	Counted toward required observations	Required	Progress
Collect 5 observations of achievement	0	5	

9. The other criteria follow but are tallied only if they coincided with an observation of achievement, a 4 or 5. Example, in the example below, they would only get an emergency consult counted if they also achieved a 4 or 5 on that observation. It lists how many of each requirement they have obtained, *up to the minimum required*, the

number that were required, and the percentage they have achieved so far.

Criteria	Counted toward required observations	Required	Progress
Collect 3 observations of achievement	2	3	67%
• At least 1 emergency consult	1	1	100%
• At least 3 different assessors	2	3	67%

10. Note, even if a resident achieves more than the required amount, only what achieves the requirement is displayed. This is due to the current design of the system. For example, in the image below, one observation of achievement is required. The resident met that, and this is reflected with a 1 in the column “Counted toward required observations.” However, under evaluation status, you can see the resident actually obtained 2 observations of achievement.

**EPA Status** 100%


Criteria	Counted toward required observations	Required	Progress
Collect 1 observations of achievement	1	1	100%
• At least one emergent case	1	1	100%

Evaluation status	Count
Expired/deleted	0
Pending	0
Completed	3
Completed with a min. overall score of 4	2

11. Each EPA will be listed in the report. Scroll through it to view each one.

12. To mark an EPA as achieved, simply click the button “Mark Achieved.”

 **02FOD 04 Identifying patients presenting with an anticipated difficult airway and preparing for initial management options**

EPA Status 0% ✓ Mark achieved

13. NOTE: Some departments might also use the EPA Achievement Report for their Report Cards. It can be used by the Competency Committee to quickly see what EPAs were achieved in their last meeting and what still needs to be worked on. It may also be an easy way to indicate to the Postgrad Office if progression on that stage has occurred.



## SF01TTD-\*Transition to Discipline Report Card

EPA Status

33%

Criteria	Counted toward required observations	Required	Progress
Collect 1 observations of achievement	1	1	100%
• COMMITTEE RECOMMENDS PROGRESSION	0	1	0%
• ACHIEVED: TTD-EPA 01 Performing the preoperative preparation of patients for basic surgical procedures	0	1	0%
• ACHIEVED: TTD EPA 02 Recognizing and initiating early management for critically ill surgical patients	0	1	0%
• ACHIEVED: TTD EPA 03 Documenting clinical encounters	0	1	0%
• ACHIEVED: TTD EPA 04 Demonstrating handover technique	0	1	0%
• ACHIEVED: TTD EPA 05 Demonstrating ability to function in the operating room	0	1	0%
• ACHIEVED: TTD EPA 06 Repairing simple skin incisions/lacerations "Suturing skin"	1	1	100%

14. At the bottom of the EPA Achievement Report are shortcuts to several other reports so you don't have to return to the Reports Center. Note when you use the shortcut to the EPA Detail Report, it will default to observations of achievement based on 4s and 5s. You can edit the report to show all values or simply access the report from the Reports Center directly.



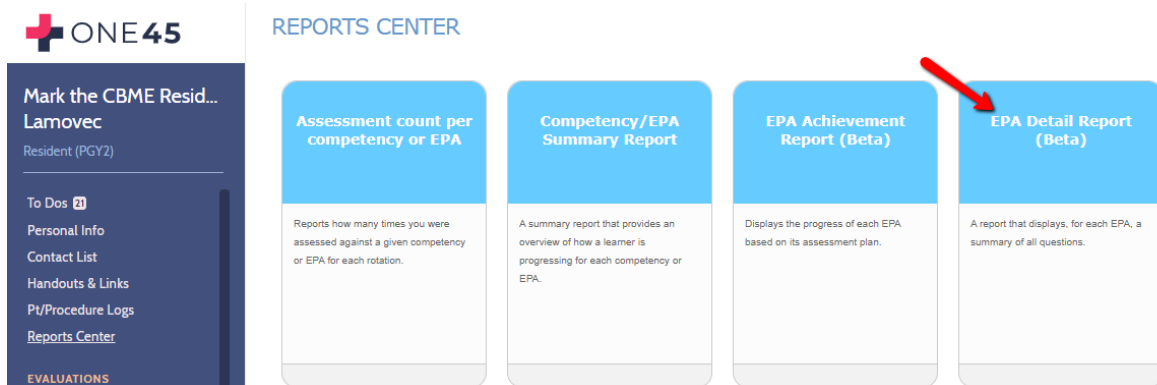
15. Also note that the EPA Achievement Report only works for EPAs that have an overall assessment 5-point scale. You will need other reports to examine forms that are solely based on narrative feedback.

## EPA Detail Report

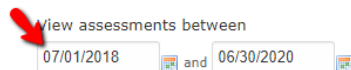
The EPA Detail Report allows you to summarize all the forms for an EPA or multiple EPAs into a single report. It is a useful report for many reasons:

- examining progress on milestones
- reviewing assessment plan/contextual requirements, especially those that are not tallied automatically by the EPA Achievement Report
- summarizing Forms 3 and 4 that may or may not have a overall assessment question or are limited to narrative feedback only
- summarizing the experiences of the resident that were not observations of achievements

1. Click on the *EPA Detail Report* in the resident's *Report Center*.



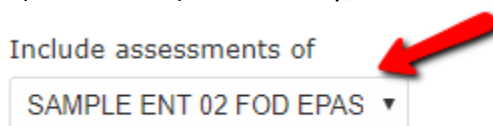
2. Specify the date range that covers the EPAs you wish to look at. Remember that if you are examining a second-year or later resident, they might have EPAs from stages spanning multiple years. You may need to set the start date to a year or more back.



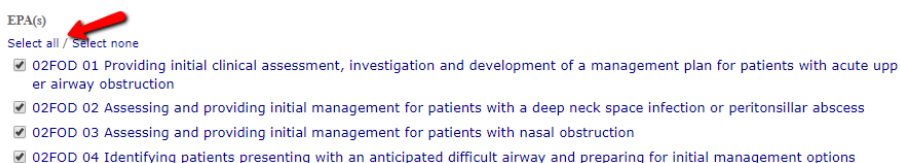
3. Specify the values from the Overall Assessment in the EPAs you want to look at. For this first example, we will look at ALL the numbers which includes 5 (*I didn't have to be there*) as well as all the other ratings such as 2 (*I had to prompt*). Note 6 is not typically used as a value on EPA forms but is there if needed.



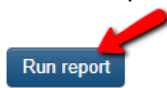
4. Specify the mapping list you wish to use. Mapping lists usually contain all the EPAs you want to review. Some departments' have their mapping lists divided by stage (Surgical Foundations 01 Transition to Discipline, Surgical Foundations 02 Foundations of Discipline, etc.) while others have one list for all their EPAs (All ENT EPAs). When ready, click *View report*.



5. Select all the EPAs you wish to see in the report.



6. Click Run Report.



7. One45 will now generate your report. The report will load with varying speeds, depending on the number of forms you included.

Generating report



8. This is what the report looks like. You will see the report has summaries of each form that look like the EPA form you triggered.

**Mark the CBME Resid... Lamovec**  
Resident (PGY2)

To Dos  
Personal Info  
Contact List  
Handouts & Links  
PI/Procedure Logs  
Reports Center  
EVALUATIONS  
Evaluations  
SCHEDULES  
My Calendar  
My Rotations  
Vacation/Leave  
Manage Calendar Feeds  
ADMINS ONLY  
Low Performance  
Admin Status

**EPA DETAIL REPORT (MARK THE CBME RESIDENT EMPLOYEE)**  
A report that displays, for each EPA, a summary of all questions.

**Heads up!** This report is in beta and may not be accurate. Please use caution when making judgments based on this data. Please contact us at product@one45.com to give us your feedback on this report.

Reports Center Create new report Print

**02FOD 01 Providing initial clinical assessment, investigation and development of a management plan for patients with acute upper airway obstruction**

Form: SAMPLE FORM: Oto-HNS2 FOD 1: Initial Clinical Assessment

**Otolaryngology - Head and Neck Surgery: Foundations of Discipline EPA #1**  
Providing initial clinical assessment, investigation and development of a management plan for patients with acute upper airway obstruction

**Key Features:**  
-The observation of this EPA is divided into two parts: patient assessments and performing a procedure (elective tracheostomy: open tracheotomy, percutaneous tracheotomy, cricothyroidotomy)  
-The patient assessment aspect of this EPA may include performing a flexible nasopharyngolaryngoscopy

**Assessment Plan:**  
**Part A: Patient Assessment**  
Supervisor does assessment based on direct or indirect observation

**Collect 1 observation of achievement:**  
-At least one emergent case

**Case scenario**  
3 Emergent  
0 Elective

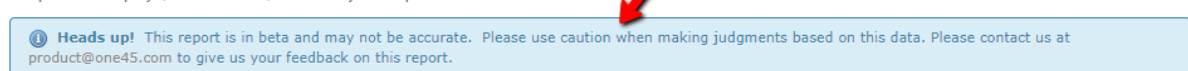
**Setting**  
2 Clinical  
1 Simulation

	I had to do	I had to talk them through	I needed to prompt	I needed to be there just in case	I didn't need to be there
Overall Assessment	0	0	1	0	2

9. Let's break it down in detail. At the top is a warning. This is a new report and might need modification as time goes on. This warning serves to warn residents and CC members not to rely ONLY on this report for determining completion of an EPA (as they should not be doing anyway).

### EPA DETAIL REPORT

A report that displays, for each EPA, a summary of all questions.



10. You can go back to the main Reports Center menu, create a new EPA Achievement Report, or print this report to paper or pdf using these options at the top.



11. Each EPA will be listed along with summary details of each instance of that EPA form. For example, in the example below, we can see there were 2 observations of achievement 5 (*I didn't need to be there*), 1 case of prompting, and 3 emergent cases done.

**02FOD 01 Providing initial clinical assessment, investigation and development of a management plan for patients with acute upper airway obstruction**

Form: SAMPLE FORM: Oto-HNS2 FOD 1: Initial Clinical Assessment

**Otolaryngology - Head and Neck Surgery: Foundations of Discipline EPA #1**

**Providing initial clinical assessment, investigation and development of a management plan for patients with acute upper airway obstruction**

**Key Features:**  
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**Assessment Plan:**  
**Part A: Patient Assessment**  
 Supervisor does assessment based on direct or indirect observation

**Collect 1 observation of achievement:**  
 -At least one emergent case

**Case scenario**  
 3 Emergent  
 0 Elective

**Setting**  
 2 Clinical  
 1 Simulation

	I had to do	I had to talk them through	I needed to prompt	I needed to be there just in case	I didn't need to be there
Overall Assessment	0	0	1	0	2

**MILESTONES**

	In Progress	Achieved
Recognize urgent issues that may need the involvement of more senior	0	3

12. When the report is run with ALL responses, we don't know which answers to various questions are associated with the observation of achievement. For example, did Dr. Windsor have to do the procedure or did she have to be there just in case? Was the head and neck history milestone observed *as In Progress* when the preceptor had to talk them through or was it observed then the preceptor was there just in case?

**Faculty Initial and Last Name (e.g. K. French)**

- B Windsor
- P Palmer
- P Palmer

**Type of observation**  
 3 Direct Observation  
 0 Indirect Observation

**Consult Type**  
 3 Emergency  
 0 Non-Emergency

	I had to do	I had to talk them through	I needed to prompt	I needed to be there just in case	I didn't need to be there
Overall Assessment	1	1	0	1	0

**MILESTONES**

	In Progress	Achieved
Elicit a basic head and neck history	1	2
Synthesize patient information including symptoms, differential diagnosis, and treatment plan clearly and concisely	2	1

13. Let's do a more refined report. Click *Create new report* at the top.

◀ Reports Center ⚙ Create new report ▼

Print

14. Uncheck the first three options in *Overall Score* and run the report again.

Overall score

Select all / Select none

☐ 1 ☐ 2 ☐ 3 ☒ 4 ☒ 5 ☒ 6

Run report

15. We can now see clearly that we have met the Emergency requirement of our assessment plan, that Dr. Windsor was one of the assessors when the resident got an observation of achievement, and the milestones are rated what is to be expected for someone observed achieving this EPA.

**Key Features:**  
- This EPA includes performing a history and examination focusing on the head and neck, synthesizing the case and presenting to supervisor

**Assessment Plan:**  
Supervisor or delegate does assessment based on direct or indirect observation with review of consult letter

**Collect 3 observations of achievement:**  
- At least 1 emergency consult  
- At least 3 different assessors

**Faculty Initial and Last Name (e.g. K. French)**  
• B Windsor

**Type of observation**  
1 Direct Observation  
0 Indirect Observation

**Consult Type**  
1 Emergency  
0 Non-Emergency

	I had to do	I had to talk them through	I needed to prompt	I needed to be there just in case	I didn't need to be there
Overall Assessment	0	0	0	1	0

**MILESTONES**

	In Progress	Achieved
Elicit a basic head and neck history	0	1
Synthesize patient information including symptoms, differential diagnosis, and treatment plan clearly and concisely	0	1
Perform a head and neck physical exam	0	1

16. Each EPA will appear one after the other.

**Professionalism and Patient Safety:**

**Do you have any concerns regarding this Learner's professionalism?**  
0 Yes  
1 No

**Do you have any concerns regarding Patient Safety?**  
0 Yes  
1 No

If yes, description of Concern:

**02FOD 03 Assessing and providing initial management for patients with nasal obstruction**

Form: SAMPLE FORM: Oto-HNS2 FOD 3: Nasal Obstruction

**Otolaryngology - Head and Neck Surgery: Foundation EPA #3**

**Assessing and providing initial management for patients with nasal obstruction**

**Key Features:**  
- This EPA includes performing a flexible nasopharyngolaryngoscopy and may include rigid sino-nasal endoscopy and/or foreign body removal  
- This EPA does not include surgical management

17. This report can be used in conjunction with the EPA Achievement Report to ensure the resident is meeting the EPA assessment plan requirements and that their milestones are matching to their overall assessment scores.

## Competency/EPA Summary Report

1. In the resident's Report Center, click *Competency/EPA Summary Report* in the menu that appears.

### REPORTS CENTER



2. Specify the date range and mapping list you want to report on and click *View Report*. (for your more senior residents, you may need to include multiple years to capture all the EPAs for that stage.)

### COMPETENCY/EPA SUMMARY REPORT (R.

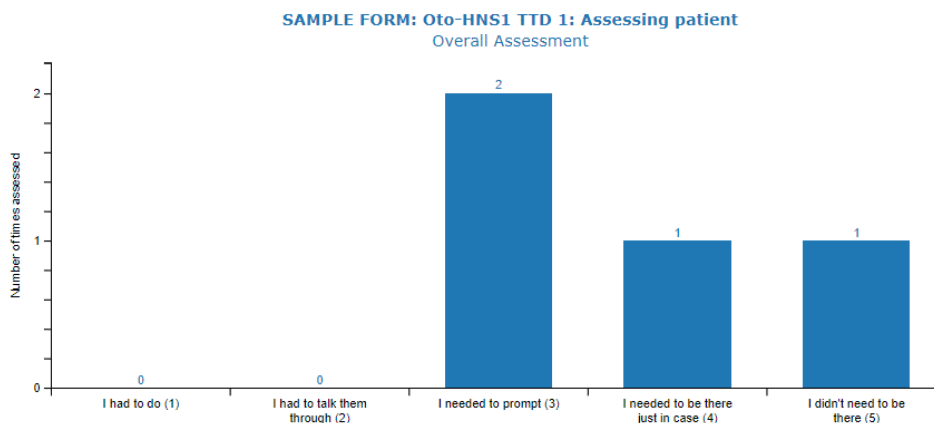
A summary report that provides an overview of how a learner is progressing

The screenshot shows a form titled 'Create new report' with a back arrow labeled 'Reports Center'. It includes a date range selector 'View assessments between' with dates '07/01/2018' and '06/30/2020'. Below is a dropdown menu 'Include assessments of' with 'SAMPLE ENT EPAS' selected. A 'View report' button is at the bottom. Red arrows point to the date range, the dropdown menu, and the 'View report' button.

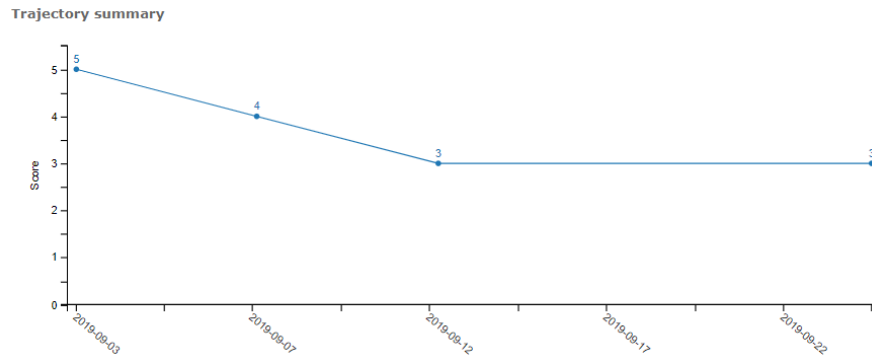
3. one45 will generate, for each EPA in that list, a series of mini-reports in one screen. The first mini-report is a bar graph that shows you the number of forms completed for that EPA and the score from each form's Overall Assessment question.

### OTOL 01 - TTD1 Assessing patients with Otolaryngology-Head and Neck Surgery presentations

#### Assessment count



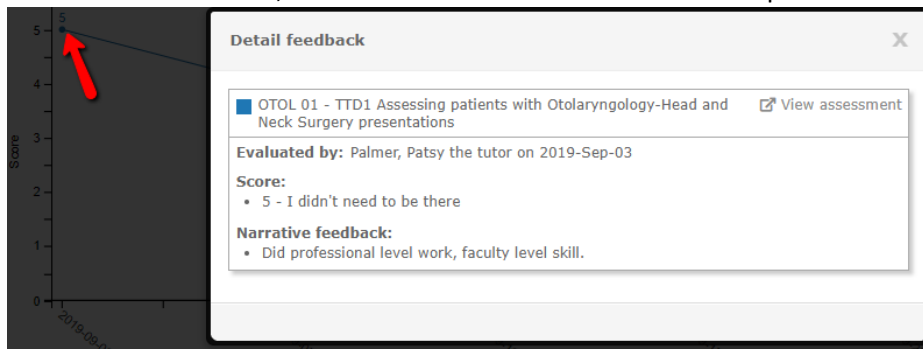
4. The next mini-report is the trajectory summary. It plots the dates that each assessment occurred. Note some might have multiple assessments on the same day.



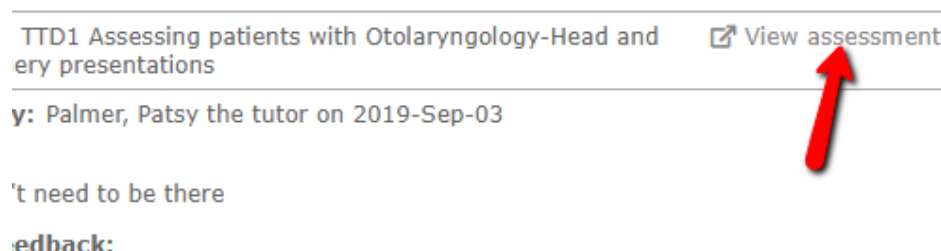
5. If you hover with your mouse over each plot on the trajectory report, it will give you a brief summary of the completed EPA form.



6. Clicking the dot on the trajectory will open a more detailed summary, including the evaluator's name, the score, the narrative feedback, and a link to view the details of the completed EPA form.



7. Click *View assessment* to view that completed EPA form. It will open in a new window.



8. When the form opens, you can then check the context that the assessment occurred in.

Dalhousie University  
Sample CBME

Evaluated By : Dench, Judi (Attending)  
Evaluating : Lamovec, Mark the CBME Resident (Resident) - PGY2  
Rotation : O2 - Foundations of Discipline (Sample CBME Otolaryngology)  
Dates : Feb 3, 2020  
Completed on : May 20, 2020

\* Indicates a mandatory response

Otolaryngology - Head and Neck Surgery: Foundations of Discipline EPA #2

Assessing and providing initial management for patients with a deep neck space infection or peritonsillar abscess

Key Features:  
- This EPA includes performing a history and examination focusing on the head and neck, synthesizing the case and presenting to supervisor

Assessment Plan:  
Supervisor or delegate does assessment based on direct or indirect observation with review of consult letter

Collect 3 observations of achievement:  
- At least 1 emergency consult  
- At least 3 different assessors

\* Faculty Initial and Last Name (e.g. K. French)  
J Dench

\* Type of observation  
Direct Observation

\* Consult Type  
Non-Emergency

9. The next mini-report is the tally of Narrative feedback. It also lists the date of the event, the evaluator's name, and the score from the overall assessment.

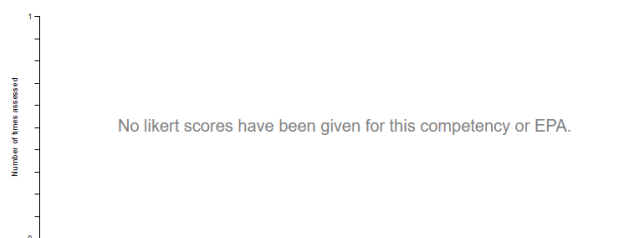
#### Narrative feedback

Start date	End date	Evaluator name	Score	Answer text
13-Sep-2019	13-Sep-2019	Dench, Judi	3	Needed some assistance with examination of cranial nerves but otherwise excellent performance.
08-Sep-2019	08-Sep-2019	Windsor the Program Director, Barbara	4	Excellent work!
25-Sep-2019	25-Sep-2019	Dench, Judi	3	Needs to improve otoscopy skills as well as of examination techniques. Recommend simulations./
03-Sep-2019	03-Sep-2019	Palmer, Patsy the tutor	5	Did professional level work, faculty level skill.

10. These reports repeat for each EPA. If a specific EPA has not been triggered, the report will appear as blank.

#### OTOL 02 - F2 Assessing and providing initial management for patients with a deep neck space infection or peritonsillar abscess

##### Assessment count



11. You can return to the Reports Center by clicking the *Reports Center* link at the top of the page.

Mark the CBME Resid...  
Lamovec  
Resident (PGY2)

To Dos  
Personal Info  
Contact List  
Handouts & Links  
PitProcedure Logs  
Reports Center

EVALUATIONS  
Evaluations

SCHEDULES  
My Calendar  
My Rotations  
Vacation/Leave  
Manage Calendar Feeds

### COMPETENCY/EPA SUMMARY REPORT (MARK THE CBME RESIDENT LAMOVEC)

A summary report that provides an overview of how a learner is progressing for each competency or EPA.

Report details  
View assessments between: 07/01/2019 and 09/30/2020  
Include assessments of: SAMPLE ENT 02 FOD EPAs  
Generated on: 05/29/2020

← Reports Center ⚙️ Create new report

02FOD 01 Providing initial clinical assessment, investigation and development of a management plan for patients with acute upper airway obstruction

Assessment count

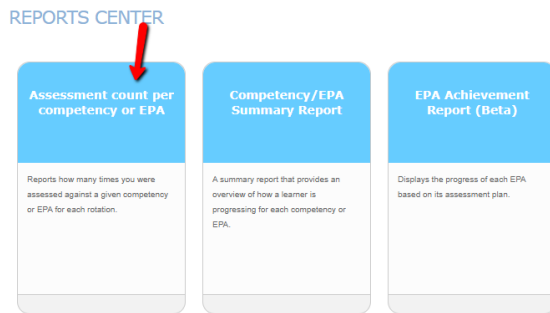
SAMPLE FORM: Oto-HNS2 FOD 1: Initial Clinical Assessment  
Overall Assessment

2

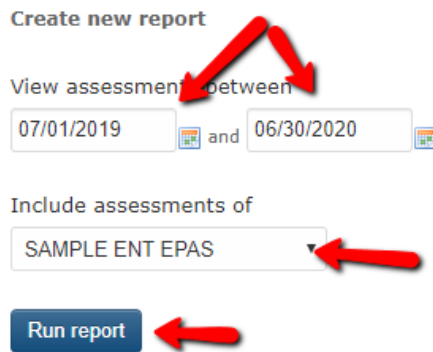


## EPA Status Report

1. The EPA Status Report is also accessed from the Reports Center.



2. You select the date range and the mapping list you want to report on and click *Run Report*.



3. EPA Status Report is a simple report that lists the number of EPA forms a resident has triggered, counting how many are expired/deleted (where faculty failed to complete the form before the close date), pending, completed, required for progression, and total observations of achievement. This information is also in the EPA Achievement Report.

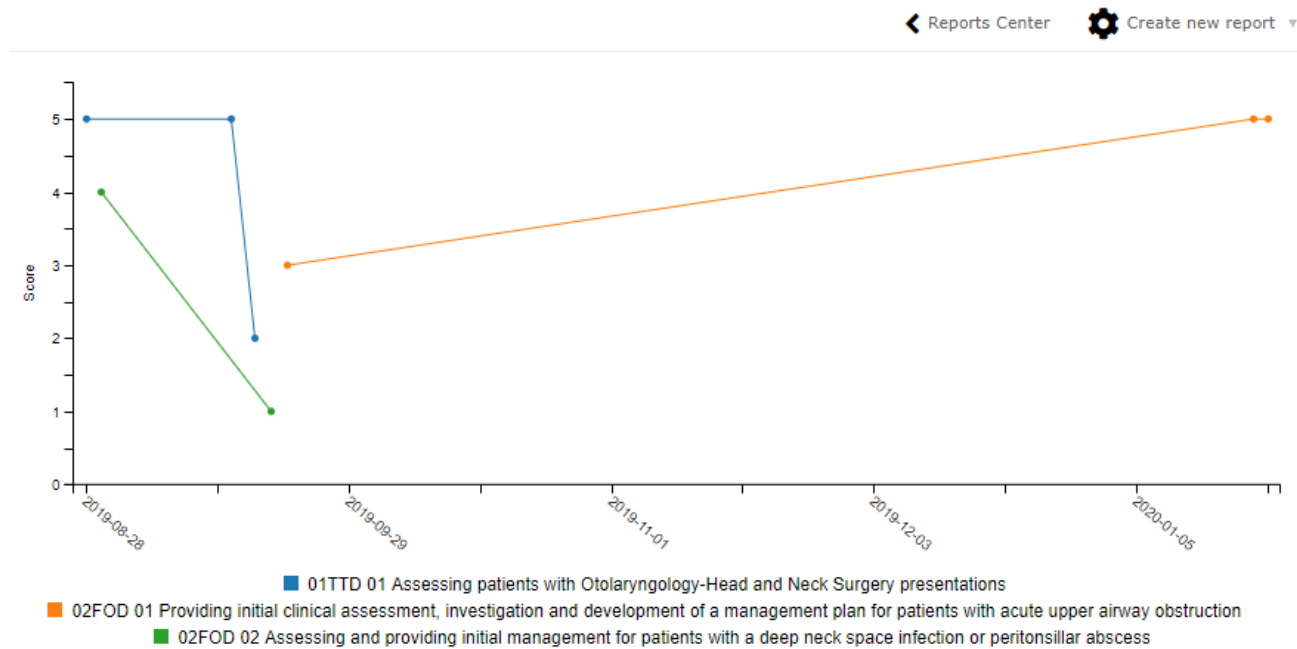
[← Reports Center](#)
[Show/hide columns](#)
[Filters](#)
[Run new report](#)

Excel Search

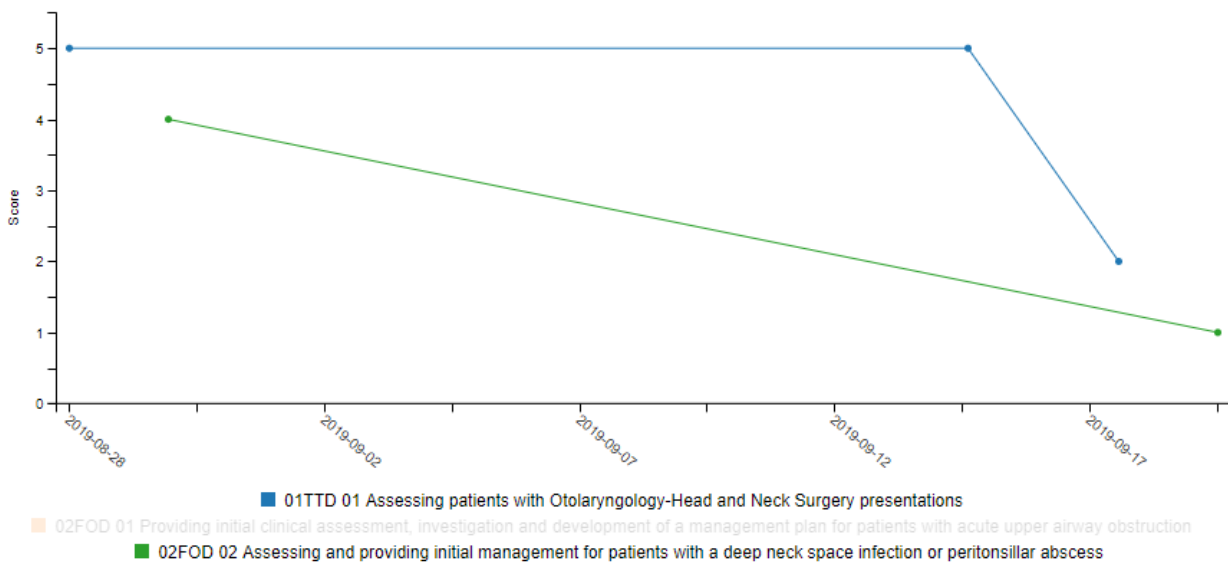
EPA name	Expired/deleted	Pending	Completed	EPAs with min. score of 4	Required
01TTD 01 Assessing patients with Otolaryngology-Head and Neck Surgery presentations	0	0	3	2	3
02FOD 01 Providing initial clinical assessment, investigation and development of a management plan for patients with acute upper airway obstruction	0	0	3	2	1
02FOD 02 Assessing and providing initial management for patients with a deep neck space infection or necrotic collar	0	0	2	1	3

## Trajectory Summary Report

The Trajectory Summary Report combines the trajectory lines from all the EPAs in a mapping list into one chart.



You can click on the EPA names in the table legend at the bottom to turn them off from the view.



## Narrative Feedback

The Narrative Feedback Report lists all the narrative feedback from the EPAs in one place, listing the EPA name, the date of observation, the evaluator's name, the overall assessment score, and the feedback text.

### NARRATIVE FEEDBACK (R. MARK THE RESIDENT LAMOVEC)

Summary of narrative feedback by competency or EPA

<div>◀ Reports Center</div> <div>👁 Show/hide columns ▼</div> <div>🔍 Filters ▼</div> <div>⚙ Run new report ▼</div>					
<div>Excel</div> <div>Search</div>					
Competency or EPA name	Start date	End date	Evaluator name	Score	Answer text
01TTD 01 Assessing patients with Otolaryngology-Head and Neck Surgery presentations	18-Sep-2019	18-Sep-2019	Dench, Judi	2	This was the resident's first experience so they were nervous. Recommend review of practices and simulations
01TTD 01 Assessing patients with Otolaryngology-Head and Neck Surgery presentations	15-Sep-2019	15-Sep-2019	Palmer, Patsy the tutor	5	No concern. Excellent skill
01TTD 01 Assessing patients with Otolaryngology-Head and Neck Surgery presentations	28-Aug-2019	28-Aug-2019	Windsor the Program Director	5	Excellent work

## Assessment Count Per Competency or EPA

The Assessment Count Per Competency or EPA report lists the total numbers for each EPA the resident has logged and in what rotation the EPA was triggered from. This is likely not very useful because most departments run their EPAs off rotations based on CBME stages.

### ASSESSMENT COUNT PER COMPETENCY OR EPA (R. MARK THE RESIDENT LAMOVEC)

Reports how many times you were assessed against a given competency or EPA for each rotation.

<div>◀ Reports Center</div> <div>👁 Show/hide columns ▼</div> <div>🔍 Filters ▼</div> <div>⚙ Run new report ▼</div>						
<div>Excel</div> <div>Search</div>						
Competency or EPA name	01 - TTD (Sample OTOL)	02 - FOD (Sample OTOL)	ANES	CARD SURG	CONSULT	Total
01TTD 01 Assessing patients with Otolaryngology-Head and Neck Surgery presentations	3	0	0	0	0	3
02FOD 01 Providing initial clinical assessment, investigation and development of a management plan for patients with acute upper airway obstruction	0	3	0	0	0	3
Total	3	5	0	0	0	8

## Spidergraph Report

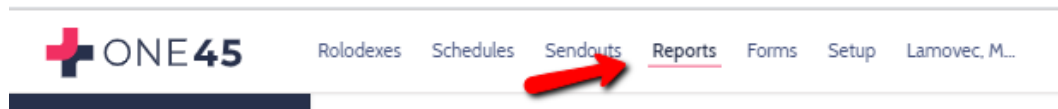
The spidergraph report displays the average of the overall assessments for each EPA. It has shown to be of little value to departments.

## REPORTS ACCESSED FROM ADMIN MENUS

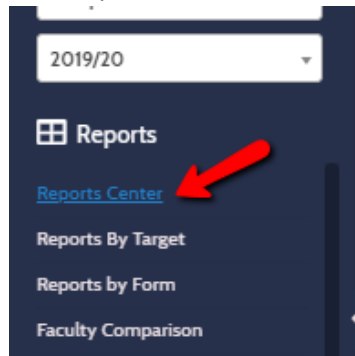
### Competency Assessment Counts

The Competency Assessment Counts report lists all the residents and EPA names in one chart to check if residents are obtaining their EPA forms and compare them to each other.

1. Click the *Reports* tab.

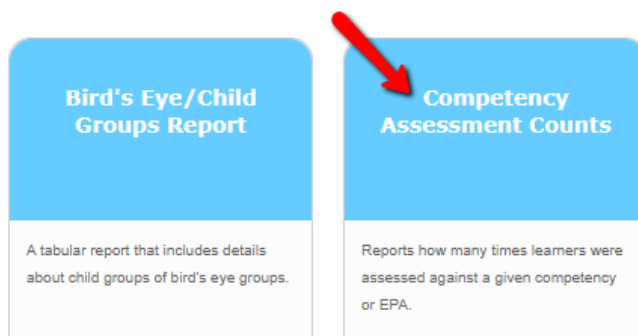


2. Click *Reports Center*.



3. Click *Competency Assessment Counts*.

### REPORTS CENTER



4. Specify the date range and the mapping list you wish to report on. Click *Run Report*.

A screenshot of the 'Create new report' form. It contains the following elements: a header 'Create new report', a label 'View assessments between', two date input fields with '07/01/2019' and '06/30/2020', a label 'Include assessments of', a dropdown menu with 'SAMPLE ENT EPAS', and two buttons at the bottom: 'Run report' (highlighted with a red arrow) and 'Export to Excel'. Red arrows indicate the sequence of steps: from the header to the first date field, then to the second date field, then to the dropdown menu, and finally to the 'Run report' button.

5. The report will list all the EPA names and tally how many have been completed on each resident. It allows comparisons between residents, displaying those that are successful at obtaining EPAs and those that aren't.

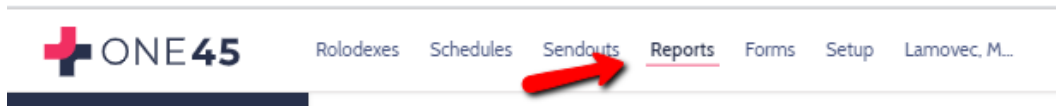
[Reports Center](#)
[Save report](#)
[Show/hide columns](#)
[Filters](#)
[Run new report](#)

[Excel](#)

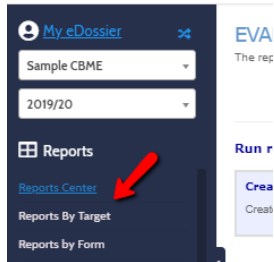
Competency or EPA name	Lamovec, R. Mark the Resident	Moy the CBME Resident, Bonny	Sahr, R. Jennifer the Resident	Total
01TTD 01 Assessing patients with Otolaryngology-Head and Neck Surgery presentations	3	5	0	8
02FOD 01 Providing initial clinical assessment, investigation and development of a management plan for patients with acute upper airway obstruction	3	2	0	5
02FOD 02 Assessing and providing initial management for patients with a deep neck space infection or peritonsillar abscess	2	0	0	2
02FOD 06 Assessing and providing initial management for patients with nasal obstruction	0	0	0	0
03COD 01 Providing Post-Operative Management	0	0	0	0
<b>Total</b>	<b>8</b>	<b>7</b>	<b>0</b>	<b>15</b>

## Reports by Target

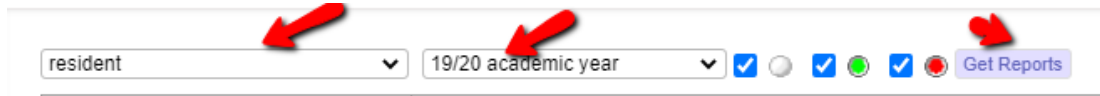
1. You can get individual summary reports for each resident using Reports by Target. Click the *Reports* tab.



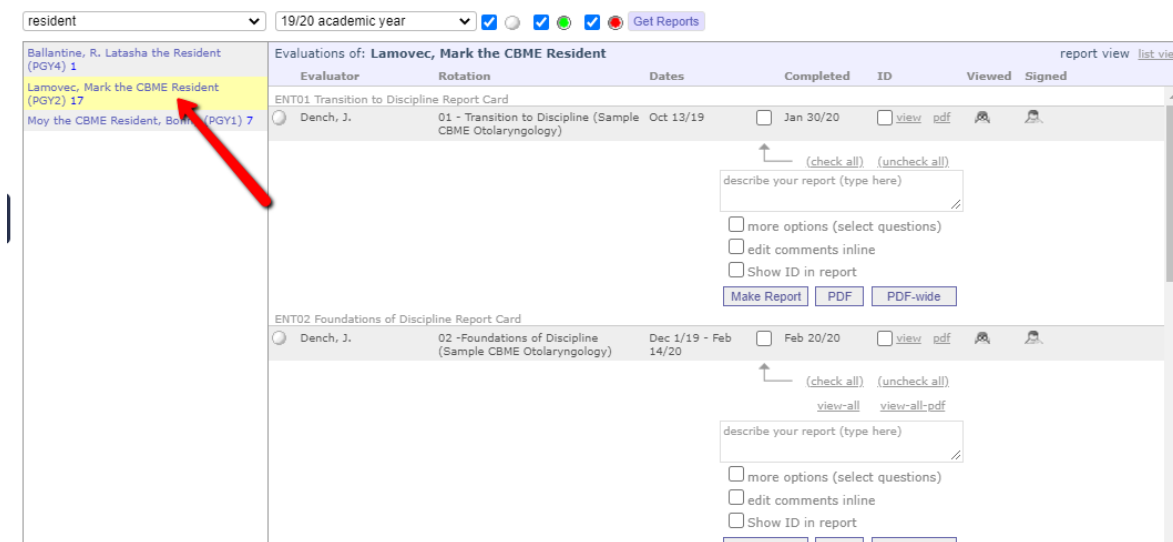
2. Click *Reports by Target*.



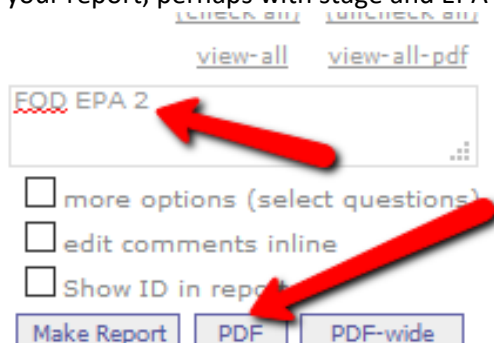
3. Click resident, the date range you want, and *Get Reports*.



4. Click the resident you want and find the EPA you want to report on. Click *check all* to select all the forms for that EPA.



5. Describe your report, perhaps with stage and EPA name. Then click *PDF*.



- Dalhousie University  
Sample CBME
- Report on resident: Lamovec, Mark the CBME Resident  
Compiled on: Jun 29, 2020
- Note: FOD EPA 2
- 
- ## Otolaryngology - Head and Neck Surgery: Foundations of Discipline EPA #1
- ### Providing initial clinical assessment, investigation and development of a management plan for patients with acute upper airway obstruction
- Key Features:**
- The observation of this EPA is divided into two parts: patient assessments and performing a procedure (elective tracheostomy: open tracheotomy, percutaneous tracheotomy, cricothyroidotomy)
  - The patient assessment aspect of this EPA may include performing a flexible nasopharyngolaryngoscopy
- Assessment Plan:**
- Part A: Patient Assessment**
- Supervisor does assessment based on direct or indirect observation
- Collect 1 observation of achievement:**
- At least one emergent case
- Case scenario**
- 3 Emergent  
0 Elective
- Setting**
- 2 Clinical  
1 Simulation

- Dalhousie University**  
Sample CBME

Report on resident: **Lamovec, Mark** the CBME Resident  
Compiled on: **Jun 29, 2020**

Note: FOD EPA 2

## Otolaryngology - Head and Neck Surgery: Foundations of Discipline EPA #1

**Providing initial clinical assessment, investigation and development of a management plan for patients with acute upper airway obstruction**

**Key Features:**

  - The observation of this EPA is divided into two parts: patient assessments and performing a procedure (elective tracheostomy, open tracheostomy, percutaneous tracheostomy, cricothyroidotomy)
  - The patient assessment aspect of this EPA may include performing a flexible nasopharyngolaryngoscopy

**Assessment Plan:**  
**Part A: Patient Assessment**  
 Supervisor does assessment based on direct or indirect observation

**Collect 1 observation of achievement:**  
 -At least one emergent case

**Case scenario**

  - Emergent
  - Elective

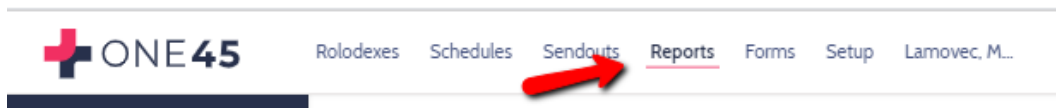
**Setting**

  - Clinical
  - Simulation

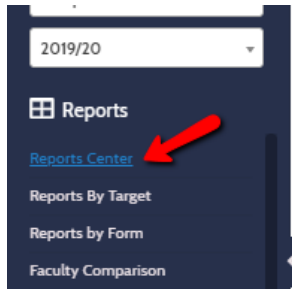
	I had to do	I had to talk them through	I needed to prompt	I needed to be there just in case	I didn't need to be there	N	Mean
Overall Assessment	0	0	0	0	2	2	5.8

## Using Form Data Report – Single Form

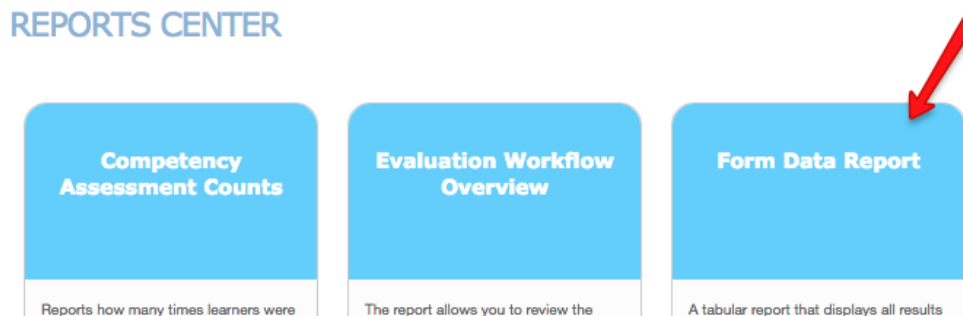
1. Click on the Reports tab.



2. From the side menu, click *Reports Center*



3. From the menu options that appear, pick *Form Data Report*.



4. Specify the date range you seek.

### Create new report

View assessments between

07/01/2017 and 06/30/2019

Form(s)

### Create new report

View assessments between

07/01/2017 and 06/30/2019

Form(s)

5. Specify the form you want data on.

Form(s)

Select all / Select none

- ☐ ITER - CVICU
- ☐ ITER - Surgery
- ☐ Kevin - ITER - Surgery (c. Oct 2017)
- ☐ SAMPLE FORM: Oto-HNS2 TTD 1: Assessing patient
- ☒ **SAMPLE FORM: Oto-HNS2 FOD 1: Initial Clinical Assessment**
- ☐ SAMPLE FORM: Oto-HNS2 FOD 2: Initial Management

6. Click *Submit*



## 7. To select only the columns you wish to see, click *Show/Hide columns*

### FORM DATA REPORT

A tabular report that displays all results for a particular form within a date range. You can customize the display on screen and export the results to Excel.

Reports Center Show/hide columns Filters Create new report

Excel Search

Form name	Evaluator lastname	Evaluator middlename	Evaluator firstname	Evaluator role	Evaluator grad year	Target lastname	Target middlename	Target firstname	Target role
SAMPLE FORM: Oto-HNS2 FOD 1: Initial Clinical Assessment	WORKSHOP_DR		KEVINFRENCH2	attending	WORKSHOP			RESIDENT Connie	resident

## 8. Check only the details and questions you wish to show. You may find it easier to click *Select none* first if you only have a few fields you want. Click *OK* to reset your table.

### Show/hide columns

Select all / Select none

Numerical Answer Select all / Select none Text Answer Select all / Select none

#### Information about assessment

Select all / Select none

- ☐ Form type
- ☐ Moment ID
- ☐ Batch ID (saID)
- ☐ Result ID (faID)
- ☒ Form name
- ☒ Evaluator lastname
- ☐ Evaluator middlename
- ☐ Evaluator firstname
- ☐ Evaluator email
- ☐ Evaluator role
- ☐ Evaluator rank
- ☐ Evaluator grad year
- ☐ Evaluator student/employee/faculty number
- ☐ Evaluator PGY level
- ☐ Evaluator one45 ID
- ☒ Target lastname
- ☐ Target middlename
- ☒ Target firstname
- ☐ Target email
- ☐ Target role
- ☐ Target rank
- ☐ Target grad year
- ☐ Target student/employee/faculty number
- ☐ Target PGY level
- ☐ Target one45 ID
- ☒ Group name
- ☒ Activity
- ☐ Activity abbreviation
- ☐ Evaluation start date
- ☐ Evaluation end date
- ☐ Evaluation sent date
- ☐ Evaluation received date
- ☐ Evaluation completed date

#### SAMPLE FORM: Oto-HNS2 FOD 1: Initial Clinical Assessment questions

Select all / Select none

- ☒ Type of observation
- ☒ Consult Type
- ☒ Overall Assessment
- ☒ Overall Assessment
- ☐ Synthesize patient information including symptoms, differential diagnosis, and t ...
- ☐ Perform a head and neck physical exam\* Use of microscope for otoscopy (Numerical ...)
- ☐ \* Use of headlight for anterior rhinoscopy and examination of oral cavity (Numerical Answer)
- ☐ \* Use of headlight for anterior rhinoscopy and examination of oral cavity (Text Answer)
- ☐ \* Palpation of neck, including thyroid
- ☐ Organize information in appropriate sections within an electronic or written med ...
- ☒ \*Feedback to Resident and Competence Committee:
- ☐ Do you have any concerns regarding this Learner's professionalism?

## 9. You will now see a table with only those answers.

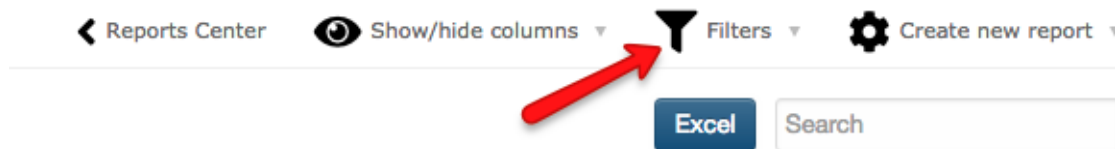
A tabular report that displays all results for a particular form within a date range. You can customize the display on screen and export the results to Excel.

Reports Center Show/hide columns Filters Create new report

Excel Search

Form name	Evaluator lastname	Target lastname	Target firstname	Activity	Type of observation	Consult Type	Overall Assessment (Numerical Answer)	Overall Assessment	*Feedback to Resident and Competence Committee:
SAMPLE FORM: Oto-HNS2 FOD 1: Initial Clinical Assessment	WORKSHOP_DR	WORKSHOP	RESIDENT Connie	02 - Foundations of Discipline (Otolaryngology)	Direct Observation	Non-Emergency	2	I had to talk them through	Resident twice shined the light in the patient's eyes up close when using the headlight due to lack of warning that she was moving around with it or going to use it. Should always warn patient to close their eyes.

## 10. If you wish to limit the responses to certain answers, like only see answers if they got a 4 or 5 for overall assessment, click *Filters*.



11. Specify your criteria. In this example, we want the numerical responses for Overall Assessment to be between 4 and 5. Otherwise, we don't want to see the answers. Click **OK**.

**Filters**

Match for **All** of the following rules

Overall Assessment (Numerical Answer) is in the range 4 and 5

**Ok** **Cancel**

12. The results will refresh and only show the data for responses of between 4 and 5.

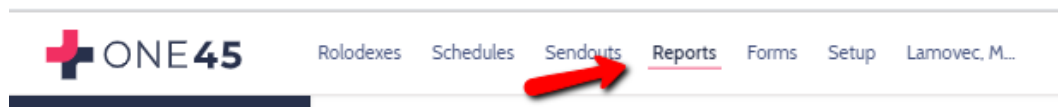
	Evaluator lastname	Target lastname	Target firstname	Activity	Type of observation	Consult Type	Overall Assessment (Numerical Answer)	Overall Assessment	*Feedback to Resident and Competence Committee:
2:	WORKSHOP_DR	MacDonald	Barry the Resident	02 - Foundations of Discipline (Otolaryngology)	Direct Observation	Non-Emergency	5	I didn't need to be there	I didnt need to be there. Skilled and ready for Foundations.
2:	WORKSHOP_DR	MacDonald	Barry the Resident	02 - Foundations of Discipline (Otolaryngology)	Indirect Observation	Non-Emergency	5	I didn't need to be there	Had some issues with headlight but resolved them without me. I didnt need to be there.
2:	DENCH	MacDonald	Barry the Resident	02 - Foundations of Discipline (Otolaryngology)	Indirect Observation	Emergency	4	I needed to be there just in case	Almost there. I wasnt completely confident owing to his last go at it but feel pretty confident now.
2:	DENCH	MacDonald	Barry the Resident	02 - Foundations of Discipline (Otolaryngology)	Direct Observation	Emergency	5	I didn't need to be there	Excellent patient interaction. Would have been confident not being there.

13. You can download this data to Excel if you like.

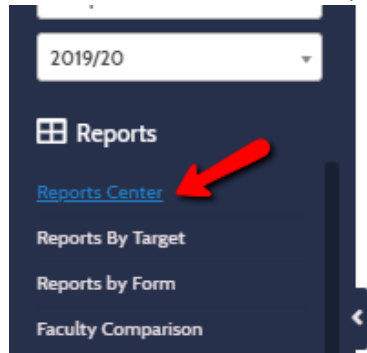


## Using Form Data Report – Multiple Reports

1. Click on the *Reports* tab.

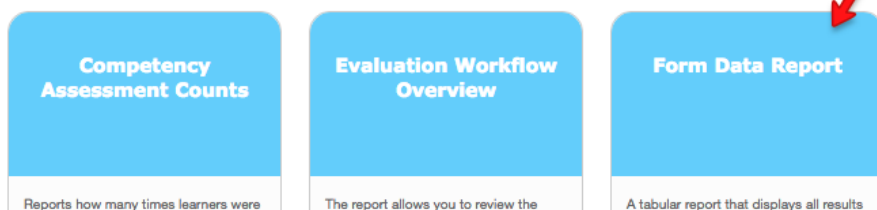


2. From the side menu, click *Reports Center*.



3. From the menu options that appear, pick *Form Data Report*.

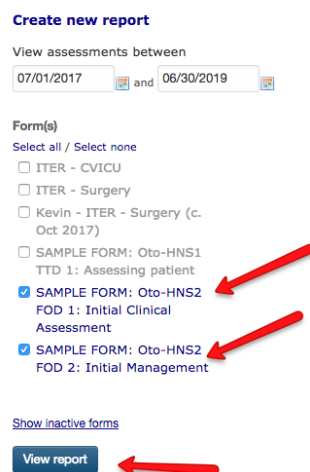
### REPORTS CENTER



4. Specify the date range you seek.



5. Check the multiple forms you want to collect data on. Click *View Report*.



## 6. To select only the columns you wish to see, click *Show/Hide columns*

### FORM DATA REPORT

A tabular report that displays all results for a particular form within a date range. You can customize the display on screen and export the results to Excel.

Reports Center **Show/Hide columns** Filters Create new report

Excel Search

Form name	Evaluator lastname	Evaluator middlename	Evaluator firstname	Evaluator role	Evaluator grad year	Target lastname	Target middlename	Target firstname	Target role
<p>SAMPLE FORM: Oto-HNS2 FOD 1: Initial Clinical Assessment</p> <p>Oto-HNS2 FOD 1: Initial Clinical Assessment      KEVINFRENCH2   attending      WORKSHOP      RESIDENT Connie   resident</p>									

## 7. Check only the details and questions you wish to show. You may find it easier to click *Select none* first if you only have a few fields you want, then check those fields. With multiple forms, you need to specify the questions you want to appear in the table. Click *OK* to reset your table.

### SAMPLE FORM: Oto-HNS2 FOD 1: Initial Clinical Assessment questions

Select all / Select none

☒ Type of observation

☒ Consult Type

☒ Overall Assessment (Numerical Answer)

☒ Overall Assessment (Text Answer)

☐ Elicit a basic head and neck history (Numerical Answer)

☐ Elicit a basic head and neck history (Text Answer)

☐ Synthesize patient information including symptoms, differential diagnosis, and t ... (Numerical Answer)

☐ Synthesize patient information including symptoms, differential diagnosis, and t ... (Text Answer)

☐ Perform a head and neck physical exam\* Use of microscope for otoscopy (Numerical Answer)

☐ Perform a head and neck physical exam\* Use of microscope for otoscopy (Text Answer)

☐ \* Pneumatic otoscopy (Numerical Answer)

☐ \* Pneumatic otoscopy (Text Answer)

☐ \* Tuning fork tests (Weber and Rinne) (Numerical Answer)

☐ \* Tuning fork tests (Weber and Rinne) (Text Answer)

☐ \* Use of headlight for anterior rhinoscopy and examination of oral cavity (Numerical Answer)

☐ \* Use of headlight for anterior rhinoscopy and examination of oral cavity (Text Answer)

☐ \* Palpation of neck, including thyroid (Numerical Answer)

☐ \* Palpation of neck, including thyroid (Text Answer)

☐ \* Examination of cranial nerves (Numerical Answer)

☐ \* Examination of cranial nerves (Text Answer)

☐ Organize information in appropriate sections within an electronic or written med ... (Numerical Answer)

☐ Organize information in appropriate sections within an electronic or written med ... (Text Answer)

☒ \*Feedback to Resident and Competence Committee:

☐ Do you have any concerns regarding this Learner's professionalism?

☐ Do you have any concerns regarding Patient Safety?

☐ If yes, description of Concern:

☐ Did you have an opportunity to meet with this trainee to discuss their performance?

☐ Did you have an opportunity to discuss your performance with your preceptor/supe ...

### SAMPLE FORM: Oto-HNS2 FOD 2: Initial Management questions

Select all / Select none

☐ Faculty Initial and Last Name (e.g. K. French)

☒ Type of observation

☒ Consult Type

☐ Synthesize patient information including symptoms, differential diagnosis, and t ... (Text Answer)

☐ Perform a head and neck physical exam\* Use of

☐ \* Use of headlight for anterior rhinoscopy and examination of oral cavity (Text Answer)

☐ \* Palpation of neck, including thyroid (Numerical Answer)

☐ Do you have any concerns regarding this Learner's professionalism?

☐ Do you have any concerns regarding Patient Safety?

## 8. Your answers for each form will appear in different columns.

### FORM DATA REPORT

A tabular report that displays all results for a particular form within a date range. You can customize the display on screen and export the results to Excel.

Reports Center **Show/Hide columns** Filters Create new report

Excel Search

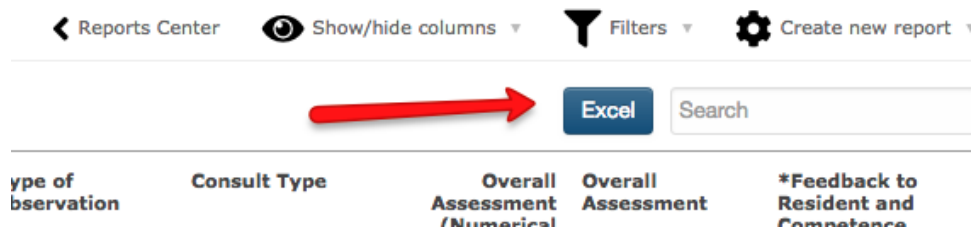
Target lastname	Target firstname	Activity	Type of observation	Consult Type	Overall Assessment (Numerical Answer)	Overall Assessment (Text Answer)	*Feedback to Resident and Competence Committee:	Type of observation	Consult Type
facDonald	Barry the Resident	02 - Foundations of Discipline (Otolaryngology)	Direct Observation	Non-Emergency	2	I had to talk them through	Resident twice shined the light in the patient's eyes up close when using the headlight due to lack of warning that she was moving around with it or going to	Direct Observation	Emergency

Showing 1 to 8 of 8 entries

Previous 1 Next

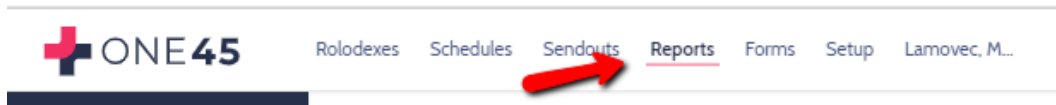
Entries per page: 100

9. Export to Excel to review or clean up the data.

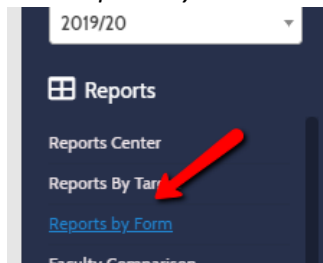


## Reports by Form

1. You may also find it useful to use Reports by Form. Reports by Form will give you all individual resident's results by EPA form. If you do a Report by Form for EPA 1 in Foundations of Discipline for example, you can get individual summaries for ALL residents in one PDF for EPA 1.
2. Click *Reports* tab.



3. Click *Reports by Form*



4. Pick the form that you want, the date range you want, and the scenario (will likely only be "attending evaluates resident")

**REPORTS BY FORM**

1. SAMPLE FORM: Oto-HNS2 FOD 2: Initial Management

2. last year

3. Select scenario:

☒ attending evaluates resident

☐ resident evaluates attending

5. Click *all individual results*.

4. Choose your report type:

a. see results for individual targets

b. all results combined onto one report

6. Check all of the rotations (should only be one if your forms are only attached to stage-based rotations) that appear.

You have chosen to report on form: **SAMPLE FORM: Oto-HNS2 FOD 2: Initial Management**  
For dates **Jul 01, 2017** to **Jun 30, 2018**  
Where **attending** evaluates **resident**

1. Pick your Rotations groupings (either individual, or you can combine a few into one "report group"):

☒ + 02 - FOD (OTOL) [Workshop - CBME]

7. Enter a name for this report, such as stage name with EPA number. Click *add group to cart*.

2. Enter a name for the group chosen above, then add to "shopping cart" below (you can add more than 1 group):

FOD EPA 2

Shopping Cart of Report Groupings

8. For the report that appears, click *i.pdf* (a pdf of all the summaries for that EPA).

Shopping Cart of Report Groupings

FOD EPA 2  (combined c.pdf individuals **i.pdf**)

02 - FOD (OTOL)

9. It will have summaries for each resident in a pdf report.

• J. Weaver  
• S. Weaver

**Type of observation**  
**4** Direct Observation  
**2** Indirect Observation

**Consult Type**  
**2** Emergency  
**4** Non-Emergency

	I had to do	I had to talk them through	I needed to prompt	I needed to be there just in case	I didn't need to be there	N	Mean
Overall Assessment	0	1	1	1	3	6	4.0

**MILESTONES**

	Not observed	In Progress	Achieved	N	Mean
Elicit a basic head and neck history	0	3	3	6	1.5
Synthesize patient information including symptoms, differential diagnosis, and treatment plan clearly and concisely	0	2	4	6	1.7
Perform a head and neck physical exam	0	2	4	6	1.7
* Use of microscope for otoscopy	0	2	4	6	1.7
* Pneumatic otoscopy	0	2	4	6	1.7
* Tuning fork tests (Weber and Rinne)	1	2	3	5	1.6
* Use of headlight for anterior rhinoscopy and examination of oral cavity	1	1	4	5	1.8
* Palpation of neck, including thyroid	0	2	4	6	1.7
* Examination of cranial nerves	0	2	4	6	1.7
Organize information in appropriate sections within an electronic or written medical record	1	0	5	5	2.0

Page 1

10. Do this for each EPA if it is useful to you.

## OVERVIEW OF REPORTING OPTIONS ON FACUTLY

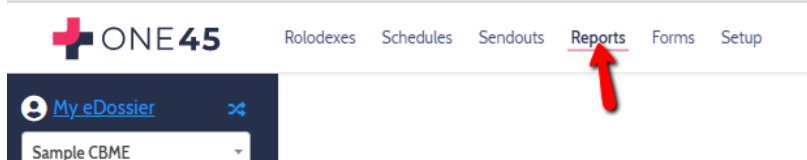
Departments may want to know how many forms a faculty has let expire or have left outstanding, especially compared to other faculty in the department. With CBME, departments may also want to know how quickly faculty are completing their forms. While one45 made improvements to form data to help in this regard, for large numbers of forms, there is an issue with access. For now, make use of Custom Search to get the information you need.

- PART A walks you through the Form Status Report and collecting and preparing your data. (p. 31)
- PART B contains steps to figure out how many completed, outstanding (saved/blank), or closed (expired) forms your faculty have from the data you collected in Part A (p. 33)
- PART C helps you calculate the average time between when your faculty receive their forms and when they complete them with the data from Part A (p. 37)

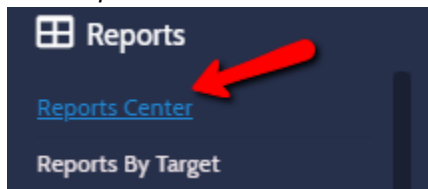
### Part 1: Form Status Report/Preparation of Data

The Form Status Report can be used on its own to give you a listing of each form sent in an academic year or span of years, who the target and evaluators were, the status of the form (pending, completed, closed, deleted)

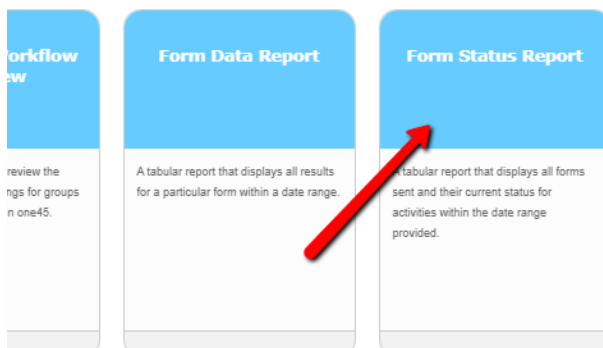
1. Navigate to <https://one45.med.dal.ca> in your browser and log in.
2. In your program space, click the *Reports* menu item.



3. Click *Reports Center* from the side menu.



4. Click Form Status Report.



5. The dates will automatically span the academic year. If you want to go wider or narrower, adjust them now.

#### Run report





6. Select the forms that you wish to check response times on.

Form(s)

[Select all](#) / [Select none](#)

<input type="checkbox"/> ENT01 Transition to Discipline Report Card	<input type="checkbox"/> ITER - Surgery	<input checked="" type="checkbox"/> SAMPLE FORM: Oto-HNS2 FOD 3: Nasal Obstruction	<input type="checkbox"/> Time Off Request Feedback
<input type="checkbox"/> ENT02 Foundations of Discipline Report Card	<input type="checkbox"/> ITER - Thoracic Surgery	<input checked="" type="checkbox"/> SAMPLE FORM: Oto-HNS2 FOD 4: Difficult Airway Procedures	<input type="checkbox"/> Time Off Request Form
<input type="checkbox"/> Evaluation of Faculty by Resident 2016	<input type="checkbox"/> new MED/ONC 3COD-EPA 01: Assessment and management plan for new patient consultation	<input checked="" type="checkbox"/> SAMPLE FORM: Oto-HNS2 FOD 5: Assessing patients and integrating clinical information in the evaluation of disease process	
<input type="checkbox"/> Evaluation of Service by Resident	<input checked="" type="checkbox"/> SAMPLE FORM: Oto-HNS1 TTD 1: Assessing patient	<input checked="" type="checkbox"/> SAMPLE FORM: Oto-HNS3 COD1: Post-Op Management	
<input type="checkbox"/> ITER - Anesthesia	<input checked="" type="checkbox"/> SAMPLE FORM: Oto-HNS2 FOD 1: Initial Clinical Assessment	<input checked="" type="checkbox"/> SAMPLE FORM: Oto-HNS3 COD2: Managing Inpatients	
<input type="checkbox"/> ITER - Cardiac Surgery	<input checked="" type="checkbox"/> SAMPLE FORM: Oto-HNS2 FOD 2: Initial Management	<input checked="" type="checkbox"/> SAMPLE FORM: Oto-HNS3 COD3: Thyroid/Parathyroid Gland Assessment	
<input type="checkbox"/> ITER - Consults	<input checked="" type="checkbox"/> SAMPLE FORM: Oto-HNS2 FOD 2: Initial Management (COHORT 2)	<input type="checkbox"/> Seminar/Presenter Evaluation	

7. Click *Export to Excel*.

[Show inactive forms](#)

[Run report](#)

[Export to Excel](#)

8. Find and open the Excel document you downloaded. Excel will likely request that you *Enable Editing* before you make changes. Do so.

AutoSave **OFF** Form Status Report (2) - Protected View

File Home Insert Page Layout Formulas Data Review View Help

PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. [Enable Editing](#)

Form name	Evaluator last name	Evaluator first name	Target last name
SAMPLE FORM: Oto-HNS1 TTD 1: Assessing patient	Dench	Judi	Moy the CBME Resident
SAMPLE FORM: Oto-HNS2 FOD 1: Initial Clinical Assessment	Windsor the Program Director	Barbara	Moy the CBME Resident

9. You need to get rid of the first blank line. Right-click over the number 1, and from the menu that appears, select *Delete*.

Clipboard Font Numbers Cells Alignment Styles Editing Ideas Sensitivity

Calibri **1** Form Status Report

Right-click over the 1

	Form name	Evaluator last name	Evaluator first name	Target last name
1				
2	INS1 TTD 1: Assessing patient	Dench	Judi	Moy the CBME Resident
3	INS2 FOD 1: Initial Clinical Assessment	Windsor the Program Director	Barbara	Moy the CBME Resident
4	INS1 TTD 1: Assessing patient	Barbara	Moy the CBME Resident	
5	INS1 TTD 1: Assessing patient	Judi	Moy the CBME Resident	
6	INS1 TTD 1: Assessing patient	Patsy the tutor	Moy the CBME Resident	
7	INS2 FOD 1: Initial Clinical Assessment	Barbara	Lamovec	
8	INS2 FOD 1: Initial Clinical Assessment	Barbara	Lamovec	
9	INS2 FOD 1: Initial Clinical Assessment	Barbara	Lamovec	
10	INS2 FOD 2: Initial Management	Palmer	Patsy the tutor	Lamovec
11	INS1 TTD 1: Assessing patient	Windsor the Program Director	Barbara	Lamovec

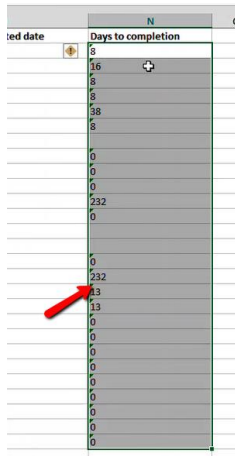
from the menu that appears, select Delete.

10. At the moment, one45 exports the data incorrectly. The Dates and Numbers in the sheet are viewed as text by Excel and need to be converted first to perform calculations. They look like numbers and dates, but Excel cannot perform calculations on them. One45 is aware of the glitch and are working to correct it.

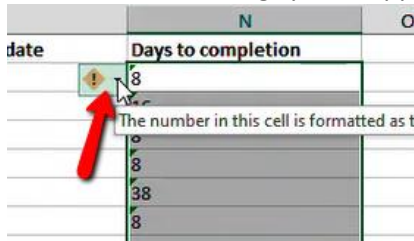
In the meantime, you have to convert the numbers from textual format to a numerical format.

You do not need to convert the date formats from text unless you have other calculations you would like to do as the reports below do not require those fields.

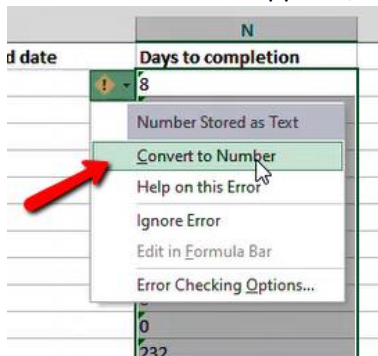
11. To convert the numbers from a text format to a numerical format, highlight all the numbers in the columns that contain numbers.



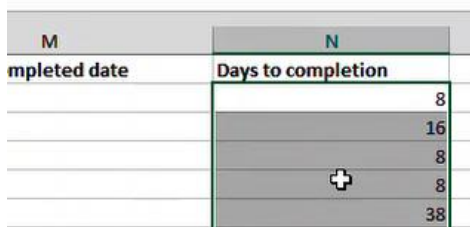
12. You will see a warning symbol appear. Click on it.



13. From the menu that appears, click Convert to Number.



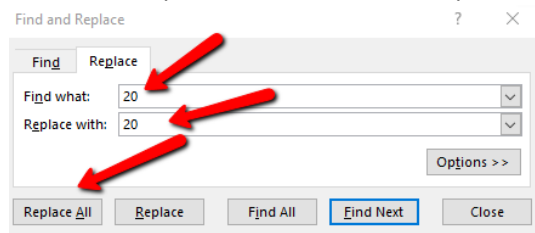
14. The numbers will shift to the right, now indicating that Excel views them as numbers.



15. To convert the dates from text to a calculable date format, click CTRL-A on your keyboard. It will highlight all the data on the sheet.

Evaluation sent date	Evaluation received date	Evaluation completed date	Days to
Jan-2019	21-Jan-2019	29-Jan-2019	
Jan-2019	21-Jan-2019	06-Feb-2019	
Jan-2019	21-Jan-2019	29-Jan-2019	
Jan-2019	21-Jan-2019	29-Jan-2019	
Jan-2019	21-Jan-2019	28-Feb-2019	
Jan-2019	21-Jan-2019	29-Jan-2019	
Jan-2019	21-Jan-2019		
Jan-2019	29-Jan-2019	29-Jan-2019	

16. Now click CTRL-H on your keyboard to bring up the Find and Replace menu. Enter 20 in the “Find what” box and 20 in the “Replace with” box. Click Replace All.



17. Excel will tell you the replacements have been made and the dates will shift to the right. They will now be in a format that can be used for calculations.

21-Jan-19	21-Jan-19
29-Jan-19	29-Jan-19
29-Jan-19	
29-Jan-19	
06-Feb-19	
06-Feb-19	
06-Feb-19	
06-Feb-19	06-Feb-19
06-Feb-19	06-Feb-19
06-Feb-19	

Microsoft Excel

All done. We made 392 replacements.

**OK**

	K	L	
	Evaluation sent date	Evaluation received date	Eva
ig-18	21-Jan-19	21-Jan-19	
ig-18	21-Jan-19	21-Jan-19	
iv-18	21-Jan-19	21-Jan-19	
iv-18	21-Jan-19	21-Jan-19	
iv-18	21-Jan-19	21-Jan-19	
iv-18	21-Jan-19	21-Jan-19	
iv-18	21-Jan-19	21-Jan-19	
iv-18	21-Jan-19	21-Jan-19	

*Note: A red arrow points to the '21-Jan-19' date in the 'iv-18' row of the second table.*

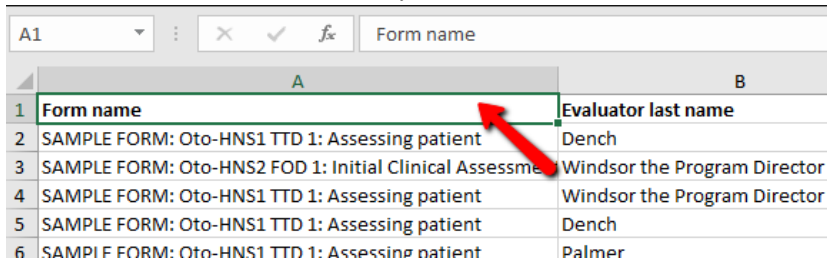
11. Now we can move on to generating the reports.

## Part 2: Status of Faculty Forms

This report will provide you with a count of the various form statuses a faculty member has within your specified date span. The statuses can include:

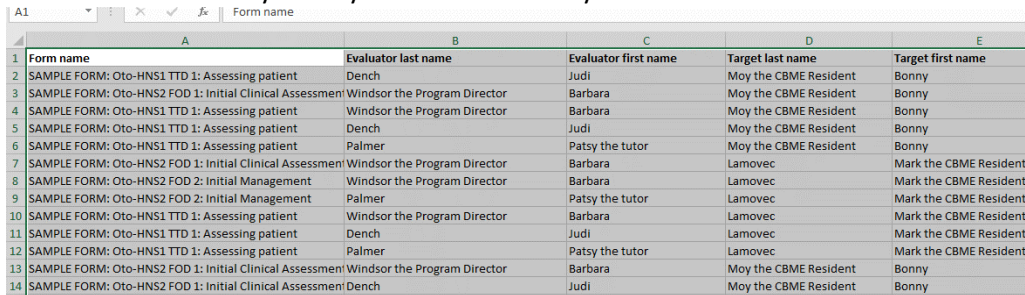
- **CLOSED:** The faculty member never completed this form and it expired.
- **COMPLETED:** The faculty member completed the form.
- **SAVED, NOT COMPLETED:** The faculty member has started but did not complete the form
- **OUTSTANDING:** The faculty member has not completed nor started this form yet.

1. Click on *Form Name* in cell A1 of your sheet.



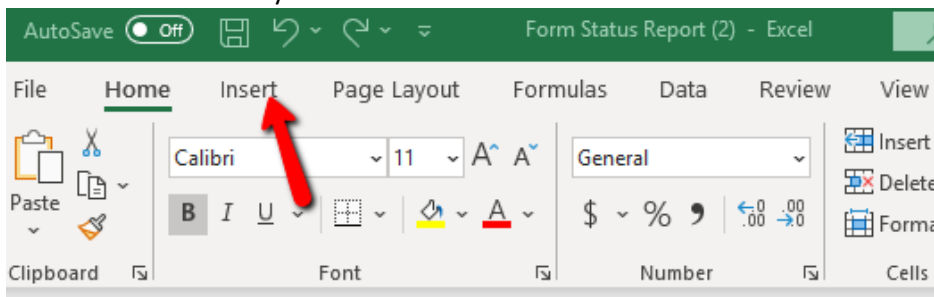
	A	B
1	Form name	Evaluator last name
2	SAMPLE FORM: Oto-HNS1 TTD 1: Assessing patient	Dench
3	SAMPLE FORM: Oto-HNS2 FOD 1: Initial Clinical Assessment	Windsor the Program Director
4	SAMPLE FORM: Oto-HNS1 TTD 1: Assessing patient	Windsor the Program Director
5	SAMPLE FORM: Oto-HNS1 TTD 1: Assessing patient	Dench
6	SAMPLE FORM: Oto-HNS1 TTD 1: Assessing patient	Palmer

2. Press CTRL and A on your keyboard to select all your data.

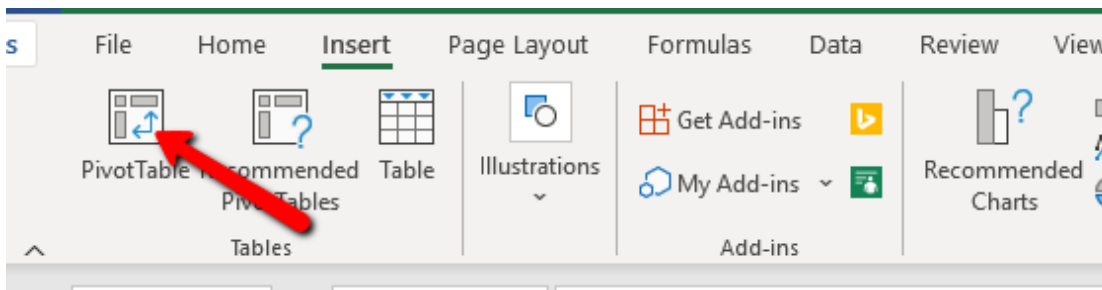


	A	B	C	D	E
1	Form name	Evaluator last name	Evaluator first name	Target last name	Target first name
2	SAMPLE FORM: Oto-HNS1 TTD 1: Assessing patient	Dench	Judi	Moy the CBME Resident	Bonny
3	SAMPLE FORM: Oto-HNS2 FOD 1: Initial Clinical Assessment	Windsor the Program Director	Barbara	Moy the CBME Resident	Bonny
4	SAMPLE FORM: Oto-HNS1 TTD 1: Assessing patient	Windsor the Program Director	Barbara	Moy the CBME Resident	Bonny
5	SAMPLE FORM: Oto-HNS1 TTD 1: Assessing patient	Dench	Judi	Moy the CBME Resident	Bonny
6	SAMPLE FORM: Oto-HNS1 TTD 1: Assessing patient	Palmer	Patsy the tutor	Moy the CBME Resident	Bonny
7	SAMPLE FORM: Oto-HNS2 FOD 1: Initial Clinical Assessment	Windsor the Program Director	Barbara	Lamovec	Mark the CBME Resident
8	SAMPLE FORM: Oto-HNS2 FOD 1: Initial Management	Windsor the Program Director	Barbara	Lamovec	Mark the CBME Resident
9	SAMPLE FORM: Oto-HNS2 FOD 2: Initial Management	Palmer	Patsy the tutor	Lamovec	Mark the CBME Resident
10	SAMPLE FORM: Oto-HNS1 TTD 1: Assessing patient	Windsor the Program Director	Barbara	Lamovec	Mark the CBME Resident
11	SAMPLE FORM: Oto-HNS1 TTD 1: Assessing patient	Dench	Judi	Lamovec	Mark the CBME Resident
12	SAMPLE FORM: Oto-HNS1 TTD 1: Assessing patient	Palmer	Patsy the tutor	Lamovec	Mark the CBME Resident
13	SAMPLE FORM: Oto-HNS2 FOD 1: Initial Clinical Assessment	Windsor the Program Director	Barbara	Moy the CBME Resident	Bonny
14	SAMPLE FORM: Oto-HNS2 FOD 1: Initial Clinical Assessment	Dench	Judi	Moy the CBME Resident	Bonny

3. Click the *Insert* tab on your Excel menu.



4. Click *Pivot Table*.



5. On the menu that appears, click OK.

Create PivotTable

Choose the data that you want to analyze

☒ Select a table or range

Table/Range: Sheet1!\$A\$1:\$N\$33

☐ Use an external data source

Choose Connection...

Connection name:

☐ Use this workbook's Data Model

Choose where you want the PivotTable report to be placed

☒ New Worksheet

☐ Existing Worksheet

Location:

Choose whether you want to analyze multiple tables

☒ Add this data to the Data Model

OK Cancel

6. A new tab will open on your worksheet with an empty pivot table.

PivotTable2

To build a report, choose fields from the PivotTable Field List

PivotTable Fields

Choose fields to add to report:

Search

☐ Form name

☐ Evaluator last name

☐ Evaluator first name

☐ Target last name

☐ Target first name

☐ Group name

☐ Activity

Drag fields between areas below:

Filters

Columns

Rows

Values

Defer Layout Update

Update

7. To start, click the *Evaluator Last Name* box and click and drag the box that appears into the ROWS section (if it doesn't go there automatically).

PivotTable Fields

Choose fields to add to report:

Search

☐ Form name

☒ Evaluator last name

☐ Evaluator first name

☐ Target last name

☐ Target first name

☐ Group name

☐ Activity

Drag fields between areas below:

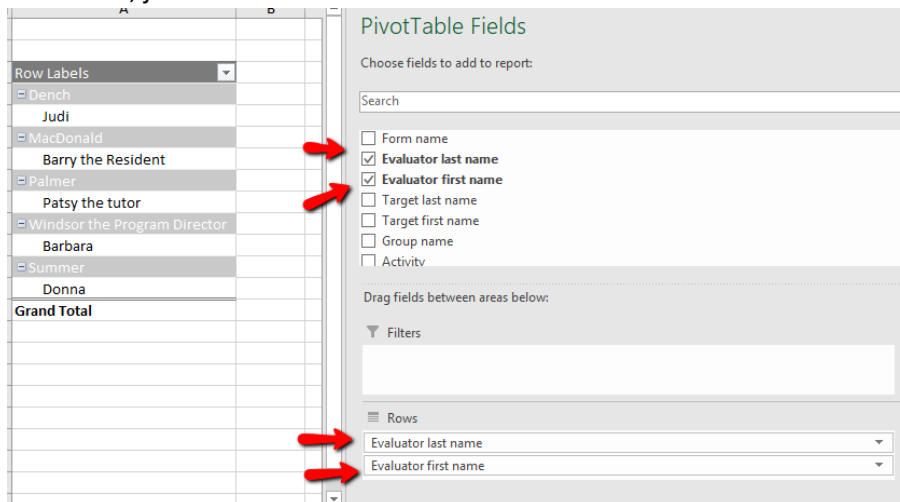
Filters

Columns

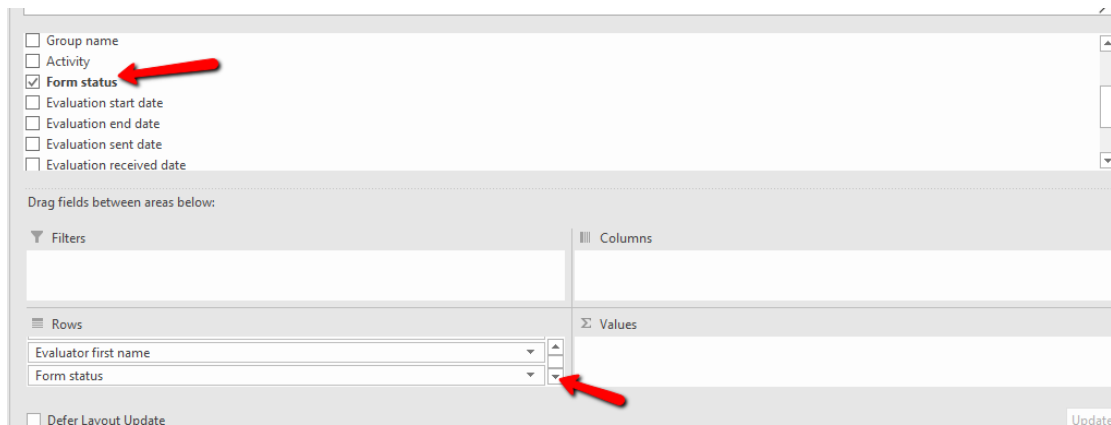
Rows

Evaluator last name

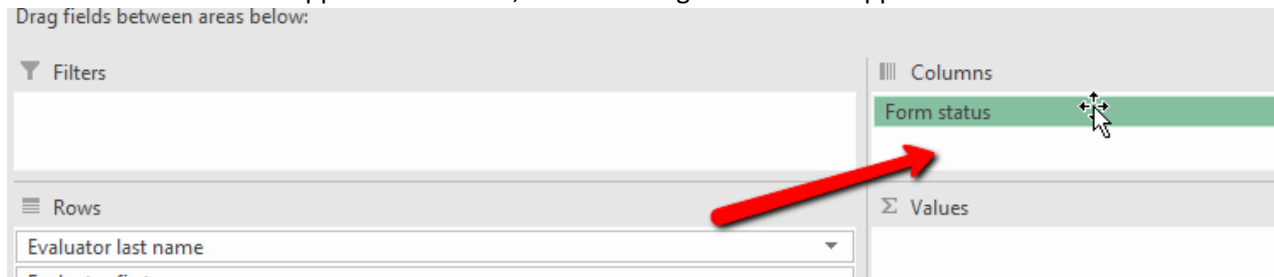
- a. Note, if any of your faculty have the same last name, you will also need to check *Evaluator First Name*. Otherwise, just leave it at last name.



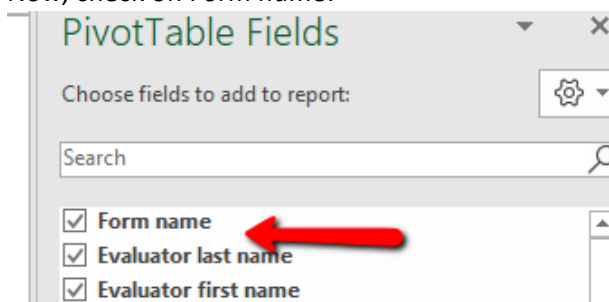
8. Then check off *Form Status* from the list.



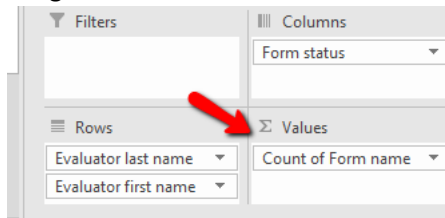
9. If *Form Status* does not appear in Columns, click and drag the box that appears over to the COLUMNS.



10. Now, check off *Form name*.



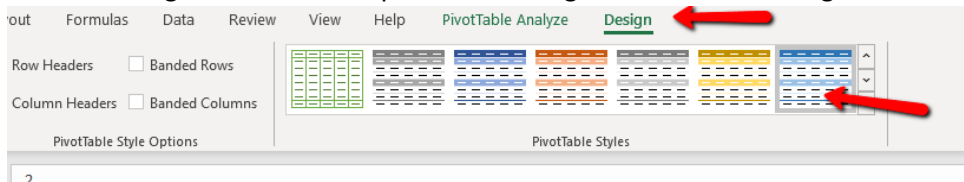
11. Drag it to the VALUES section.



12. You will now have a count of your faculty's forms and their statuses.

Count of Form name	Column Labels				
Row Labels	Completed	Sent	Closed	Deleted	Grand Total
Dench	10	4			14
MacDonald	1				1
Palmer	5	2	1		8
Windsor the Program Director	4	2	1		7
Summer	1			1	2
<b>Grand Total</b>	<b>21</b>	<b>8</b>	<b>2</b>	<b>1</b>	<b>32</b>

13. You can change the look of the pivot table using the Pivot Table Design tools.



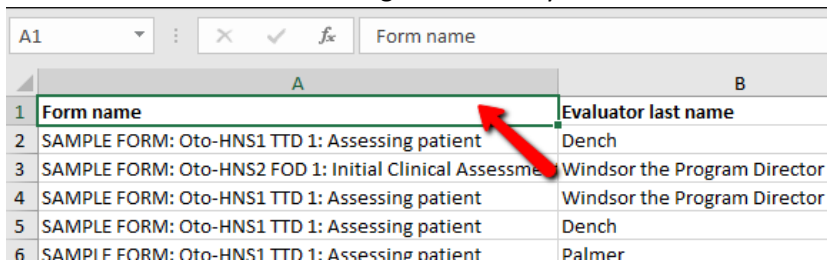
14. Note that large numbers of *Closed* indicate areas of concern as it means the forms expired and were never completed. *Sent* forms COULD be well-overdue forms, but they can also be forms they only just recently received.

15. Now you can proceed to PART C to learn how to report on the faculty's average time to complete a form.

### Part 3: Time to Completion Report

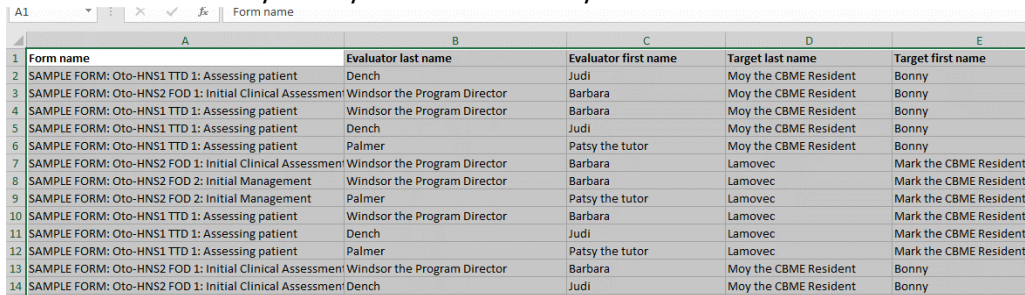
This report will tell you how long, on average, your faculty members complete their forms. If their average is zero, it means they complete their forms as soon as they receive them. Anything above that indicates the average number of days it takes them to complete them. If you already created a pivot table in PART B, you could modify it run this report. However, the steps below create a NEW pivot table (in case you didn't need to do PART B).

1. Click on the *Form Name* heading in cell A1 of your sheet.



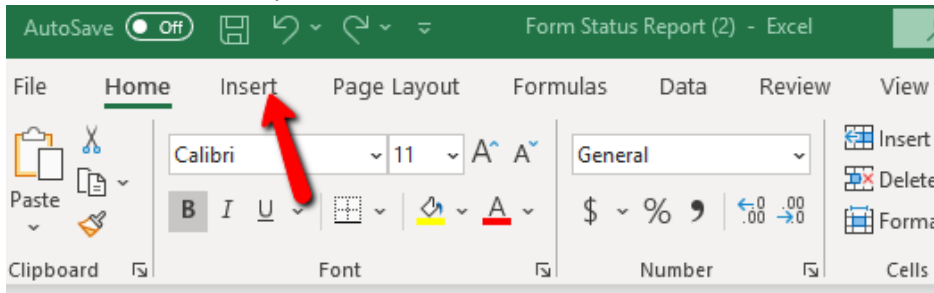
	A	B
1	Form name	Evaluator last name
2	SAMPLE FORM: Oto-HNS1 TTD 1: Assessing patient	Dench
3	SAMPLE FORM: Oto-HNS2 FOD 1: Initial Clinical Assessment	Windsor the Program Director
4	SAMPLE FORM: Oto-HNS1 TTD 1: Assessing patient	Windsor the Program Director
5	SAMPLE FORM: Oto-HNS1 TTD 1: Assessing patient	Dench
6	SAMPLE FORM: Oto-HNS1 TTD 1: Assessing patient	Palmer

2. Press CTRL and A on your keyboard to select all your data.

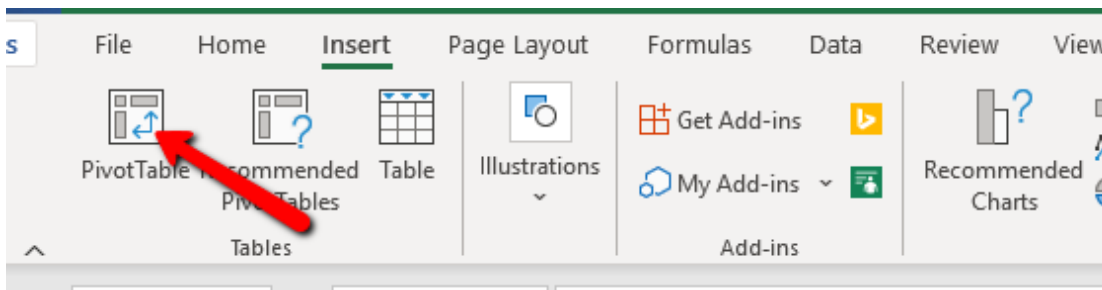


	A	B	C	D	E
1	Form name	Evaluator last name	Evaluator first name	Target last name	Target first name
2	SAMPLE FORM: Oto-HNS1 TTD 1: Assessing patient	Dench	Judi	Moy the CBME Resident	Bonny
3	SAMPLE FORM: Oto-HNS2 FOD 1: Initial Clinical Assessment	Windsor the Program Director	Barbara	Moy the CBME Resident	Bonny
4	SAMPLE FORM: Oto-HNS1 TTD 1: Assessing patient	Windsor the Program Director	Barbara	Moy the CBME Resident	Bonny
5	SAMPLE FORM: Oto-HNS1 TTD 1: Assessing patient	Dench	Judi	Moy the CBME Resident	Bonny
6	SAMPLE FORM: Oto-HNS1 TTD 1: Assessing patient	Palmer	Patsy the tutor	Moy the CBME Resident	Bonny
7	SAMPLE FORM: Oto-HNS2 FOD 1: Initial Clinical Assessment	Windsor the Program Director	Barbara	Lamovec	Mark the CBME Resident
8	SAMPLE FORM: Oto-HNS2 FOD 2: Initial Management	Windsor the Program Director	Barbara	Lamovec	Mark the CBME Resident
9	SAMPLE FORM: Oto-HNS2 FOD 2: Initial Management	Palmer	Patsy the tutor	Lamovec	Mark the CBME Resident
10	SAMPLE FORM: Oto-HNS1 TTD 1: Assessing patient	Windsor the Program Director	Barbara	Lamovec	Mark the CBME Resident
11	SAMPLE FORM: Oto-HNS1 TTD 1: Assessing patient	Dench	Judi	Lamovec	Mark the CBME Resident
12	SAMPLE FORM: Oto-HNS1 TTD 1: Assessing patient	Palmer	Patsy the tutor	Lamovec	Mark the CBME Resident
13	SAMPLE FORM: Oto-HNS2 FOD 1: Initial Clinical Assessment	Windsor the Program Director	Barbara	Moy the CBME Resident	Bonny
14	SAMPLE FORM: Oto-HNS2 FOD 1: Initial Clinical Assessment	Dench	Judi	Moy the CBME Resident	Bonny

3. Click the *Insert* tab on your Excel menu.



4. Click *Pivot Table*.





5. On the menu that appears, click OK.

Create PivotTable

Choose the data that you want to analyze

☒ Select a table or range

Table/Range: Sheet1!\$A\$1:\$N\$33

☐ Use an external data source

Choose Connection...

Connection name:

☐ Use this workbook's Data Model

Choose where you want the PivotTable report to be placed

☒ New Worksheet

☐ Existing Worksheet

Location:

Choose whether you want to analyze multiple tables

☐ Add this data to the Data Model

OK Cancel

6. A new tab will open on your worksheet with an empty pivot table.

PivotTable Fields

Choose fields to add to report:

Search

☐ Form name

☐ Evaluator last name

☐ Evaluator first name

☐ Target last name

☐ Target first name

☐ Group name

☐ Activity

Drag fields between areas below:

Filters

Columns

Rows

Values

Defer Layout Update

Update

7. To start, click the *Evaluator Last Name* box and click and drag the box that appears into the ROWS section (if it doesn't go there automatically).

PivotTable Fields

Choose fields to add to report:

Search

☐ Form name

☒ Evaluator last name

☐ Evaluator first name

☐ Target last name

☐ Target first name

☐ Group name

☐ Activity

Drag fields between areas below:

Filters

Columns

Rows

Evaluator last name

- a. Note, if any of your faculty have the same last name, you will also need to check *Evaluator First Name*. Otherwise, just leave it at last name.

PivotTable Fields

Choose fields to add to report:

Search

☐ Form name

☒ Evaluator last name

☒ Evaluator first name

☐ Target last name

☐ Target first name

☐ Group name

☐ Activity

Drag fields between areas below:

Filters

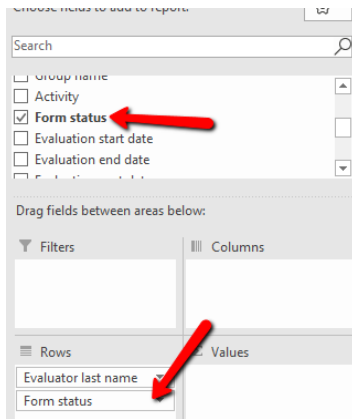
Columns

Rows

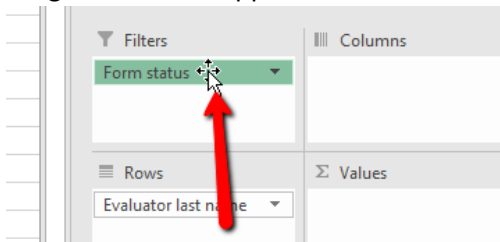
Evaluator last name

Evaluator first name

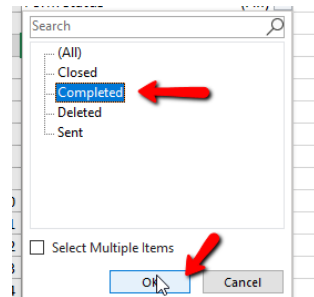
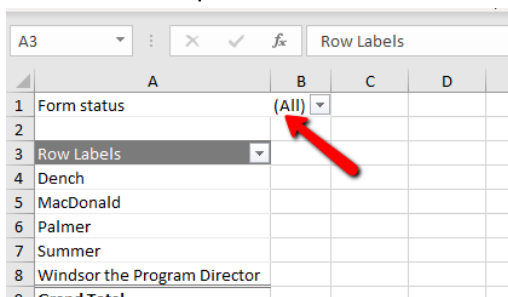
8. Check *Form Status* in the menu box.



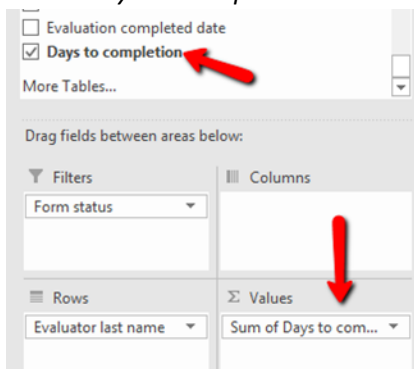
9. Drag the box that appears into the FILTERS section.



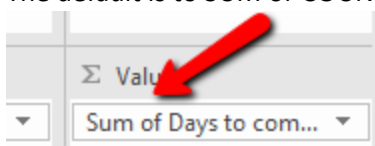
10. In the dropdown that appears above your pivot table, click the FORM STATUS dropdown and select *Completed*. Click OK. We need to do this as we are looking at the average completion time so we need to exclude everything that is NOT completed.



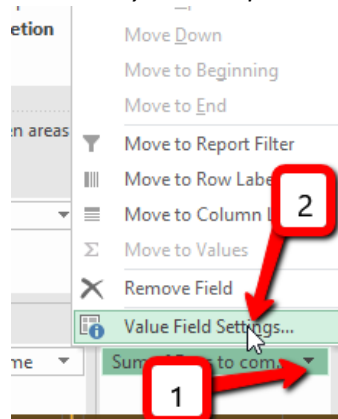
11. Check *Days to Completion* and ensure it is in the VALUES section.



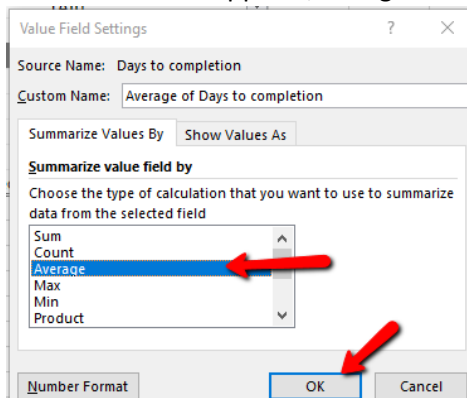
The default is to SUM or COUNT the *Days to Completion* (see below) but that's not what we want.



12. On the *Days to Completion* box, click the arrow to access a menu. Select *Value Field Settings*



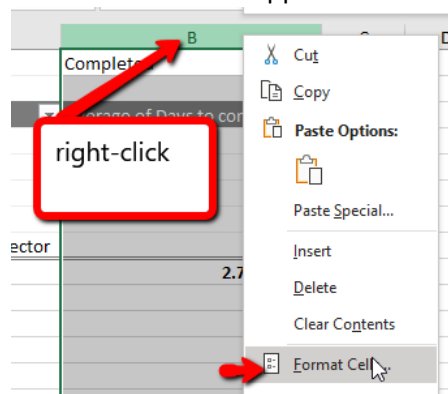
13. In the menu that appears, change it to AVERAGE and click OK.



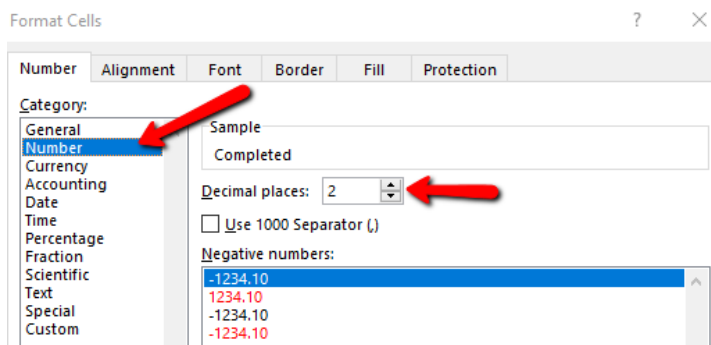
14. You will now have the average number of days it takes for each of your faculty to complete their forms.

	A	B
1	Form status	Completed
2		
3	Row Labels	Average of Days to completion
4	Dench	3.8
5	MacDonald	0
6	Palmer	1.6
7	Summer	0
8	Windsor the Program Director	3
9	Grand Total	2.761904762

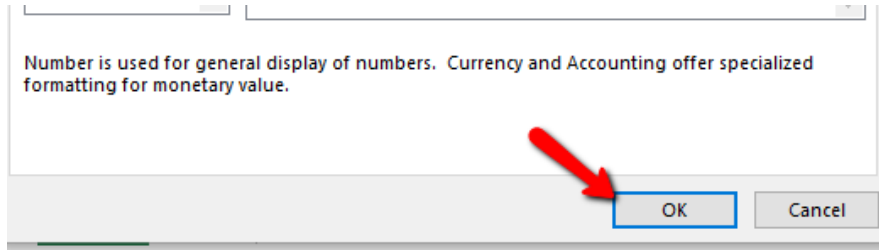
15. If you wish to limit the decimal points, right-click over the column with averages in it and select *Format Cells* from the menu that appears.



16. Select Number from the next menu that appears and set it to 2 decimal points (or your desired number).



17. Click OK when done.



18. Your averages will now be limited to two decimal points.

	A	B
1	Form status	Completed
2		
3	Row Labels	Average of Days to completion
4	Dench	3.80
5	MacDonald	0.00
5	Palmer	1.60
7	Summer	0.00
8	Windsor the Program Director	3.00
9	<b>Grand Total</b>	<b>2.76</b>