One45 and CBME: Training, Timelines and Guidelines
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One45 and CBME: Introduction

Preparing for Competency-Based Medical Education (CBME) in one45 is a shift in skills and operating procedures for Program Administrators (PAs). This document outlines the skills a PA requires for CBME, items required to get started in one45, workshops they can attend to familiarize themselves with CBME and general one45 tools, and timelines for when they should complete various stages of preparation.

New Skills for CBME

Prior to CBME, a Program Administrator’s work in one45 was often limited to basic scheduling, simple workflows, and infrequent send-outs and reporting. CBME brings a change in operating procedures to for assessing residents in this new method. Program Administrators will need to know how to:

- **Build and edit forms**
  CBME requires the use of many and different types of forms, each representing an Entrustable Professional Activity or EPA. It is very important that PAs know how to build but also edit and replace their forms as they may frequently change in the early days of CBME.

- **Use mapping tools to connect forms with lists of EPAs**
  one45 has developed reporting tools that allow the tracking of completion of EPAs by residents. These reports require connecting questions in forms to what is called a mapping list that contains all the names of the EPAs. This is a new tool that requires training.

- **Setting up new types of workflows**
  Traditionally, assessment forms get sent to the PA to distribute to the faculty members that worked with the resident and can evaluate them. In CBME, residents trigger forms themselves and pick the faculty that worked with them on a particular procedure or interaction. Some departments have faculty trigger the forms on the resident as well. PAs will not only need to know how to set up workflows to allow these self-send scenarios but also know how to organize/name their forms so that residents and faculty can easily find the EPA they wish to use for evaluation.

- **Generate new reports**
  Reporting was relatively simple to do and infrequent prior to CBME. One45 is still developing new tools for reporting on EPA completion, and there are gaps in what their reporting tools directly provide. PAs need to know alternative methods to get at the information the Competency Committee (CC) needs to do a proper assessment of resident achievement.

- **Grant one45 access to Competency Committee members for review of resident files**
  One of the methods for gathering information on achievement by the CC and advisors is to provide direct access to resident evaluations. This is a new requirement and there are several methods to allow that CC members that access.

- **Track faculty stats**
  Faculty will now need to complete assessment forms far more frequently and quickly, as residents need multiple assessments on specific interactions. If too much time passes, faculty will not necessarily remember details from the exchange or forms with short turnaround times will expire. Departments currently doing CBME are now reviewing the timeliness of form completion as well as tracking how often faculty let forms expire. PAs will need to know how to calculate this as there is no single report in one45, for now, that generates this information.
Workshops
It is recommended a PA take the following workshops on one45 tools for CBME.

- **Form Building**
  This workshop teaches skills on how to build and edit forms, set low performance flags, and establish workflows for those forms.

- **CBME Setup**
  Teaches how to design a form for CBME, map forms to EPA lists for later reporting, create workflows for self-sends by residents, and consider strategies for scheduling.

- **CBME Reporting**
  Covers topics on how to get and package the data the residents, program directors, and Competency Committee members require to assess resident progress.

- **CBME Readiness (optional)**
  Designed for those PAs who may have had trouble fitting all the preparation steps into their already busy schedules, this open-ended workshop provides brief reviews on the various steps to get ready for CBME and lab time to complete the steps. The Medical Education Technologist will be available the entire time for questions, individual queries, etc. PAs will hopefully leave the workshop either with their work completed or well on its way.

- **General Reporting (optional)**
  This covers other types of reporting, some of which may be useful for addressing very specific questions not addressed by standard CBME reporting.
Items Required for the PA to Prepare for CBME

The Program Administrator will need to have various sources of information about their department’s approach to CBME in order to build anything in one45. The PA must work with their Program Director to gather this information in a timely fashion so they can begin their preparation on time and develop all pieces for their CBME launch.

- **List of EPAs names**
  - A document or Excel file with the full list of EPA names is required for building a mapping list to link the EPA forms to the reporting tool in one45.
  - Some departments maintain a list of a full names for the reports as well as an abbreviated list to use for the form names. Using abbreviated names for the forms allow residents/faculty to quickly find the EPA they want without weeding through too much text. The Royal College has official short names for the EPA names.

- **EPA forms**
  - All the EPA forms should include:
    - Stage, EPA name and number
    - Key Features
    - Assessment plan information such as how the EPA is observed and by whom
    - How many observations of achievement are required and required elements
    - Other information that is being collected (type of observation, procedure, setting, etc)
    - What form should be used (Form 1, 2, 3, or 4) for global rating/narrative feedback
    - Any milestones that should be assessed. The Royal College requires all bolded milestones listed on provided EPA forms to be included.
    - If used, as mentioned in section above, any abbreviations for the lengthy EPA names
  - Note that the Royal College will issue official EPA forms officially 6 months prior to the CBME launch.

- **Form Behaviours**
  - Will only residents will trigger EPA forms? Or will your faculty have ability to trigger them on residents they worked with? Will all faculty be able to trigger forms or just some? Are there some EPAs where faculty from other departments or nurses may want to trigger forms? This information affects how the workflows in one45 are designed.
  - How long will forms be available to faculty to complete? Some departments keep forms open for 30 days while others make the form close after 14 days. Some even think it should be shorter because they believe a faculty member will not remember the details of a resident’s performance during a single procedure for very long.

- **Competency Committee Details**
  - CC members can review resident files on their own in one45 as mentors of the residents and as rotation heads of the CBME rotations in the program space. The names are required ahead of time to set this up.
  - Note that Postgrad has rules about non-Dalhousie faculty/staff (such as nurses and other community members) who will have access to assessment data in one45. The department will need to request a guest Dalhousie NetID (user account) for each user needed as well as have
them sign confidentiality forms. See Postgrad if you have Competency Committee members like this.

- What role will the PA play in Competency Committees? Will they be present at meetings to update report cards, distribute summary reports, etc? Or will they leave all that to the members to generate?
- What do they need to see and in what format?

**Report Cards for each CBME Stage**

- For each stage in CBME (Transition to Discipline, Foundations of Discipline, etc), the department needs a report card to track which EPAs were completed, which EPAs needed further action, and details about promotion to the next stage. Faculty of Medicine’s CBME Team Lead has a guidelines document for this if you have questions.
- The report card can be housed and run in the one45 system just like the EPA forms, triggered instead by members of the Competency Committee, committee chair, and/or the PA. PAs should consult with MedIT about strategies for designing this report card in one45 as there are system constraints on the types of questions that can be used.
Recommended Timeline for CBME Launch on July 1st (includes a pilot starting April 1st)

- **September**
  - Program Administrator (PA) and Program Director (PD) consult with Medical Education Specialist in MedIT on how one45 works for CBME, possible tools, etc.

- **October**
  - PA attends the *one45 Form Building Workshop*.

- **November**
  - PA builds a selection of forms using any draft EPA forms from the Royal College.
  - PA requests general review of forms from MedIT Medical Education Specialist

- **December**
  - PD reviews the sample EPA forms and makes suggestions or changes to layout.
  - PA makes changes as suggested by PD.

- **January**
  - PA builds official EPA forms as released by the Royal College based on prior feedback from PD and Medical Education Specialist.

- **February**
  - PA attends the *one45 CBME Setup Workshop*.
  - PA creates their mapping lists, maps their forms, creates any CBME rotations, and sets up their evaluation workflows.

- **March**
  - PA requests from MedIT any additional lines in their rotation schedule for CBME rotations (01 TTD, 02 FOD, etc). *Note: Departments that have launched CBME have used extra lines in the schedule. They schedule their primary rotations in the top line and rotations based on CBME stages in the second line. Some use a third line to ensure residents on-call can trigger EPA forms from future stages.*
  - PA attends the *one45 CBME Reporting Workshop* to learn how to get data from one45 on CBME residents.
  - PA single-sends a few CBME forms to their program director using a sample resident as the target for completion and testing reporting tools.

- **April**
  - If any of the above steps were not completed by this time, PA attend *one45 CBME Readiness Workshop*.
  - Department launches pilot CBME program with a few forms and non-CBME residents

- **May**
  - PA enrolls their new CBME residents in the rotation schedule for the next academic year, scheduling their normal rotations and CBME rotations.
  - PA makes any final changes to any forms or workflows.

- **June**
  - Final review of all details tied to CBME
  - PA attends *one45 General Reporting Workshop*. The workshop provides instruction on other types of reporting that might be useful when trying to narrow down data points for CBME.

- **Following Fall**
  - If the PA needs a refresher, they attend any of the other workshops previously offered.
CBME Readiness Checklist

Are you ready to launch CBME on July 1st? Use this checklist to ensure you are ready to go! To contact the Medical Education Specialist (MedEd Specialist) listed below, email meditsupport@dal.ca.

<table>
<thead>
<tr>
<th>Task</th>
<th>How do I do that?</th>
<th>To do by....</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Meet with MedIT Medical Education Specialist for introduction to CBME in one45</td>
<td>Contact the MedEd Specialist at <a href="mailto:meditsupport@dal.ca">meditsupport@dal.ca</a></td>
<td>September</td>
</tr>
<tr>
<td>☐ Gather EPA names and <strong>draft</strong> EPA forms.</td>
<td>Contact your PD for these details</td>
<td></td>
</tr>
<tr>
<td>☐ Attend <em>Form Building Workshop</em></td>
<td>MedEd Specialist will send out survey for signup. Contact if you have not received notice. This is <strong>REQUIRED</strong> for form building access.</td>
<td>October</td>
</tr>
<tr>
<td>☐ Build a selection of practice EPA forms using Royal College <strong>draft</strong> EPAs</td>
<td>Use skills obtained from Form Building Workshop; review <em>Form Building Module</em> in one45 manuals.</td>
<td>November</td>
</tr>
<tr>
<td>☐ Have Medical Education Specialist review sampling of forms (general layout, question type choice, font)</td>
<td>Contact the MedEd Specialist at <a href="mailto:meditsupport@dal.ca">meditsupport@dal.ca</a></td>
<td></td>
</tr>
<tr>
<td>☐ Have PD review your forms and make changes based on feedback</td>
<td>Contact your PD. If they do not have one45 administrative access to see the forms, contact <a href="mailto:meditsupport@dal.ca">meditsupport@dal.ca</a> to request it.</td>
<td>December</td>
</tr>
<tr>
<td>☐ Build final EPA forms released from the Royal College</td>
<td>Use skills obtained from Form Building Workshop; review <em>Form Building Module</em> in one45 manuals.</td>
<td>January</td>
</tr>
<tr>
<td>☐ Have PD review final forms</td>
<td>Contact your PD and instruct them to review the EPA forms.</td>
<td>February</td>
</tr>
<tr>
<td>☐ Attend <em>CBME Setup Workshop</em></td>
<td>MedEd Specialist will send out survey for signup. Contact if you have not received notice.</td>
<td></td>
</tr>
<tr>
<td>☐ Create your CBME rotations (optional)</td>
<td>Use skills from CBME Setup Workshop; review <em>Create a New Rotation</em> in one45 manuals.</td>
<td></td>
</tr>
<tr>
<td>☐ New lines in schedule added (optional)</td>
<td>Contact the MedEd Specialist at <a href="mailto:meditsupport@dal.ca">meditsupport@dal.ca</a> to make this request.</td>
<td></td>
</tr>
<tr>
<td>☐ EPA mapping list created</td>
<td>Use skills from CBME Setup Workshop; review <em>Add Mapping List</em> in one45 manuals or request MedEd Specialist import mapping list.</td>
<td></td>
</tr>
<tr>
<td>☐ Forms mapped to mapping list</td>
<td>Use skills from CBME Setup Workshop; review <em>Linking Assessments to Milestones</em> in one45 manuals.</td>
<td></td>
</tr>
<tr>
<td>☐ Forms added to evaluation workflows/self send scenarios setup</td>
<td>Use skills from CBME Setup Workshop; review <em>Add Forms to Evaluation Workflow</em> and <em>Self Send Setup</em> in one45 manuals. Before beginning, see MedEd Specialist for tips on setting these up quickly!</td>
<td></td>
</tr>
<tr>
<td>☐ Faculty added to best guess lists (if using)</td>
<td>Use skills from CBME Setup Workshop; review <em>Best Guess List</em> in one45 manuals.</td>
<td></td>
</tr>
<tr>
<td>Task</td>
<td>Details</td>
<td>Month</td>
</tr>
<tr>
<td>----------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>--------</td>
</tr>
<tr>
<td>Low performance flags added to the patient safety/professionalism questions</td>
<td>Use skills from CBME Setup Workshop; review <a href="#">Low Performance Flagging</a> in one45 manuals.</td>
<td></td>
</tr>
<tr>
<td>Attend CBME Reporting Workshop</td>
<td>MedEd Specialist will send out survey for signup. Contact if you have not received notice.</td>
<td>March</td>
</tr>
<tr>
<td>Confirm one45 has enabled CBME Reporting for department space in one45</td>
<td>If CBME reporting is not available, contact the MedEd Specialist at <a href="mailto:meditsupport@dal.ca">meditsupport@dal.ca</a>.</td>
<td></td>
</tr>
<tr>
<td>PA and PD test drive their setup with test resident scheduled into current year, triggering and completing EPA forms and examining reports</td>
<td>Use skills from CBME Setup Workshop</td>
<td>April</td>
</tr>
<tr>
<td>Competency Committee members added as mentors/rotation heads</td>
<td>Use skills from CBME Setup Workshop; review <a href="#">Mentor Training</a> and <a href="#">Rotation Head Setup</a> in one45 manuals.</td>
<td>April</td>
</tr>
<tr>
<td>Schedule the current residents piloting CBME forms/launch pilot</td>
<td>Use skills from CBME Setup Workshop; review <a href="#">Rotation Schedule</a> in one45 manuals.</td>
<td>May</td>
</tr>
<tr>
<td>Any final form or workflow changes made.</td>
<td>Use skills obtained from <a href="#">Form Building and CBME Setup Workshop</a>; review <a href="#">Form Building Module</a> and <a href="#">Add Forms to Evaluation Workflow</a> in one45 manuals.</td>
<td>May</td>
</tr>
<tr>
<td>New CBME residents scheduled for new academic year</td>
<td>Use skills from CBME Setup Workshop; review <a href="#">Rotation Schedule</a> in one45 manuals.</td>
<td>June</td>
</tr>
<tr>
<td>Attend General Reporting Workshop for additional methods for reporting in one45</td>
<td>MedEd Specialist will send out survey for signup. Contact if you have not received notice.</td>
<td>June</td>
</tr>
</tbody>
</table>
Specialized Instructions for CBME

Some of the recommendations for running CBME in one45 exist are specific to Dalhousie Faculty of Medicine, lack one45 instructions, or must use tools outside of the system. Below, please find instructions for several tasks you will need for implementing CBME in one45: setting up your Competency Committee members as mentors and rotation heads to review your CBME residents and calculating how many EPA forms your faculty are completing (or not completing) and how quickly they respond to them.

Using the Rotation Head Tool to Provide Competency Committee Members with Access to Individual and Summarized EPA Forms

If your department schedules your CBME residents into rotations based on stages of CBME (Transition to Discipline, Foundations of Discipline, etc.) and runs EPA forms off those rotations, you can make use of the Rotation Head tool to grant access for your Competency Committee members to see them. Via this tool, they can use Reports by Target to collate EPA forms. Follow the instructions below to set up a Competency Committee role and attach your committee members.

NOTE: Assigning the rotation heads to the CBME stage rotations will NOT grant them access to their ITERs from standard rotations. They will need to use the Mentor role (instructions following) to access that.

1. Click on the Setup Tab.

2. Click Rotation Heads from the side menu.

3. Click manage roles.

4. Click add new role.
5. Enter Competency Committee as the title of the new role. Click Save.

6. It will now save as a new tab. Now check “View Student and Resident Evaluations” and any other permissions you may wish for them to have (e.g. you may wish for them to see the rotation schedule for the CBME stages, Handouts and Links, Procedure Logs, etc). It saves automatically.

7. Not click on rotation overview to add your members.

8. You can add committee members to a single rotation or you can bulk add them to multiple CBME rotations at the same time. If you are using only a single CBME rotation (usually called CBD or CBME), proceed to the next step, 8a. If you are using four CBME rotations (e.g. 01 TTD, 02 FOD, etc), then skip to step 9.

   a. To add people to a single rotation, click add people in the rotation you want to modify.

   b. A window will appear. Pick Competency Committee from the dropdown. Then select the start date they began on the committee and, if you know a termination date, an end date for when they
will be off the committee. You do NOT need to enter an end date. 

**NOTE:** Even if you set the start date in a particular year, they will still be able to see PAST forms for that rotation from previous years. They will be able to look at a resident’s EPA forms from those CBME rotations.

c. Now search for your faculty. You can add people one by one if they have different dates but more likely, you will want to add them all to the list before you click save. Start by searching for one faculty member:

d. Click the name of the faculty member so it copies to the column on the right.

e. Search for your next faculty members and add them.
f. Click Save when done.

g. They will now appear under the rotation as members of the Competency Committee.

h. To remove a name, click their name and a window will open. Click delete to get rid of them from the list.

9. If you use four rotations for CBME stages and want to add your Competency Committee members to all of them at once, you can do the following:
   a. To add people in bulk to multiple rotations as Competency Committee members, click bulk add.
b. A window will appear but before you do anything with it, check the rotations you will be adding to first. This way you don’t forget at the end.

c. Pick Competency Committee from the dropdown. Then select the start date the members will start on the committee and, if you know a termination date, an end date for when they will be off the committee. You do NOT need to enter an end date.

NOTE: Even if you set the start date in a particular year, they will still be able to see PAST forms for that rotation from previous years. They will be able to look at a resident’s EPA forms from those
CBME rotations.

d. Now search for your faculty. You can add people one by one if they have different dates but more likely, you will want to add them all to the list before you click save. Start by searching for one faculty member:

e. Click the name of the faculty member so it copies to the column on the right.

e. Search for your next faculty members and add them.
10. Your Competency Committee members now have the ability to look at details for each CBME stage.

11. This means they can also access *Reports by Target* for each stage to look at each resident’s individual EPA forms as well as generate summaries of each EPA.
12. For the Competency Committee members to see the specialized CBME summary reports or ITERs and other forms derived from standard rotations, you need to assign them as mentors. See the instructions following.
Using the Mentors Tool to Provide Competency Committee Members with Access to the CBME EPA Report and ITERs

Adding your Competency Committee members as mentors to your CBME residents will give them access to each resident’s Competency/EPA Report and other reports. They will also be able to view ITERs and other forms that come from their specific discipline-specific rotations.

1. In order to add your Competency Committee members as mentors to your residents, they first have to be in your Attending rolodex. This includes anyone who sits on your committee from outside your department. Click rolodexes.

2. Click Attendings.

3. Review the list of attendings.
4. If anyone is missing, click *add faculty* at the bottom of the Attending rolodex.

5. Search for the committee member by entering their last name and clicking Search.

6. If they don’t exist, follow steps a through 6. If they come up, skip to step 7.
   a. If no name came up, click create a new faculty.
   b. Enter the committee member’s name, email, and other relevant details.
   c. Click Submit when ready.
   d. The faculty member will be added to your rolodex. Repeat this process if you have other faculty to add.

7. If your search produced results, click the name of your committee member, and the name will appear on the right.
8. Click “Add to my department/rolodex” to add them.

9. Now add them as mentors. Click on the Setup tab.

10. Click Mentors in the side menu.

11. For each Competency Committee member, click add residents.

13. Click each of your CBME residents. They will appear to the right.

14. Click Ok.

15. The residents will now be listed as mentees for that committee member. Repeat for the rest of your committee.

16. As Mentors, they will access the residents’ profiles from their eDossier. They will pick their name from a drop-down menu.

17. They can look at the residents’s Competency/EPA Summary and other reports.
18. They can also look at individual ITERs for specific rotations.

19. If you make use of the Procedure Logs, they can see those too.