COMPETENCE COMMITTEES AND ONE45

Accessing Resident Information in one45

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As a member of the competence committee, there are several options to review EPA forms and other documents for your residents. Check with your Program Administrator to see which options are available and then follow the directions below. The first guide is a quickstart guide to using the Competency/EPA report accessible through your access as a "Mentor" in one45. Check with your Program Administrator (PA) if you have Mentor access. Read on for detailed instructions on that and other ways to access the information you need.

QUICKSTART GUIDE: Using the EPA Achievement and CBME/EPA Summary Reports

The best way to get a sense of your resident's progress with EPAs is the EPA Achievement Report, EPA Detail Report, and the CBME/EPA Summary Report in the Reports Center of that resident's account. Follow these directions to access that report.

1. From your one45 account, click on the dropdown in your eDossier (ToDos page of one45) and select a resident in the Mentees section to view.
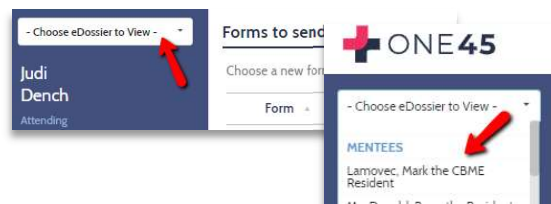
2. If you wish to see if the resident has met the basic requirements of an EPA (assessment plan/contextual information, minimum number of observations of achievement), use the *EPA Achievement Report.*

3. Pick the date range you want to see the EPAs from as well as the EPA list (see your PA about which list(s) you should select), and click *View Report*.
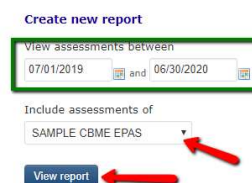
4. one45 will generate, for each EPA in that list, a summary of the contextual/assessment plan requirements for each EPA.

   The *EPA Status section* tells you if they met all requirements or not. You can also mark it as achieved (careful as for right now, only one45 can undo that) You can see the requirements met (only shows you minimum, not extras.)

   Evaluation status shows how many times they triggered it, if any are expired or pending (faculty didn't do them) and how many had a score of 4 or more.

5. From this report you can jump to the rest of the reports with shortcuts at the bottom of the page of the EPA Achievement Report
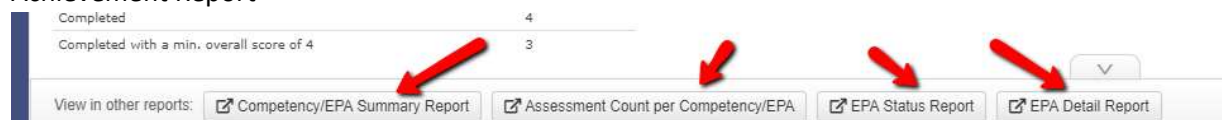
6. If you wish to see a summary of all instances of an EPA for that resident, to review milestones or check on any assessment plan/contextual information that cannot be tallied by the EPA Achievement Report (example: short answer questions), run the EPA Detail Report. From the shortcut, it will, by default, show you a summary of all the 4s and 5s for that EPA.

   If you want to see a summary of ALL the observations of an EPA, not just the 4s and 5s, you can click Create New Report on the top right and select all the values.

7. If you wanted to look at individual instances of an EPA form, or check who the evaluators were for the observations of achievement, run the Competency/EPA Summary Report. This report will generate three mini-reports. The first one gives you a basic tally of the observations of achievement.
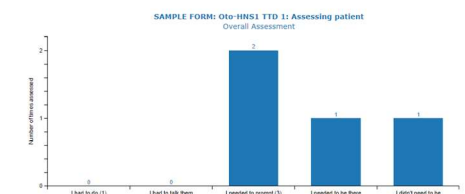

8. The next mini-report is the trajectory summary which gives you the most access/detail. It plots the dates that each assessment occurred. Note some might have multiple assessments on the same day.

9. If you hover over each plot on the trajectory report, it will give you a brief summary of the completed EPA form.
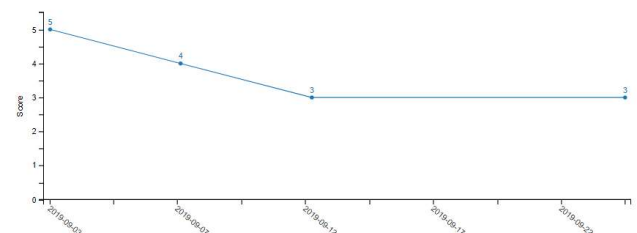
10. Clicking the dot on the trajectory will open an even more detailed summary, including the evaluator's name, the score, the narrative feedback, and a link to view the entire completed EPA form.

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

12. When the form opens, you can then check the context of that particular completed assessment.

13. The next mini-report is a tally of Narrative feedback but also includes the names of the evaluators, the score from the overall assessment, and the date of the event.

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.

14. 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

No likert scores have been given for this competency or EPA.
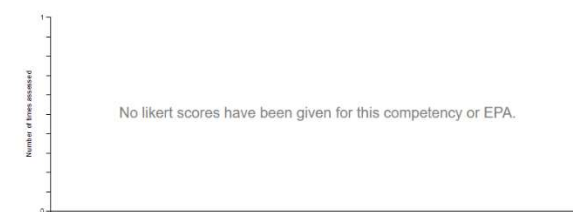
REPORTS IN RESIDENT EDOSSIER

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. From your one45 account, click on the dropdown in your eDossier (ToDos page of one45) and select a resident in the Mentees section to view.
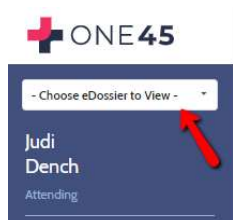
2. Click *Reports Center*.
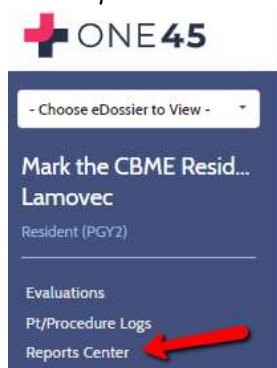
3. A selection of reports will appear. +

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 wont 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*
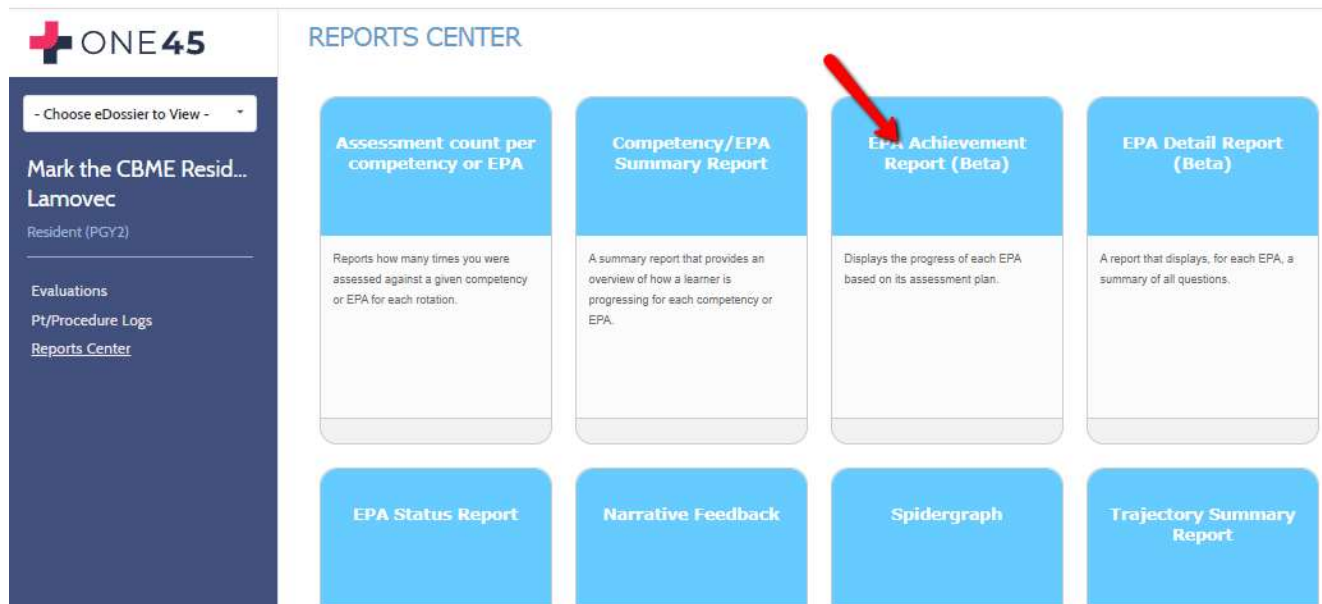
2. Specify the date range that covers the EPAs you wish to look at. Remember that second-year or later residents might have EPAs from stages spanning multiple years. You may need to set the start date to a year or more back.
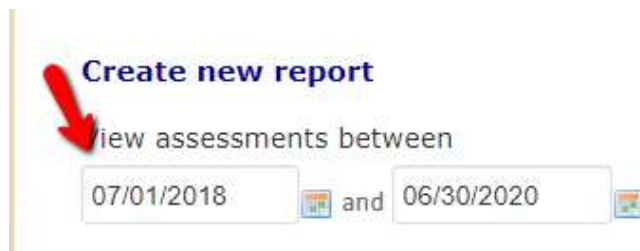
3. Specify the mapping list you wish to use. Mapping lists contain all the EPAs you want to analyze for that resident. Some departments' have their mapping lists divided by stage (Surgical Foundations 01 Transition to Discipline, Surgical Foundations 02 Foundations of Discipline, etc.) while others have 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.

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).

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.)

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.

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.

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.

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.

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.

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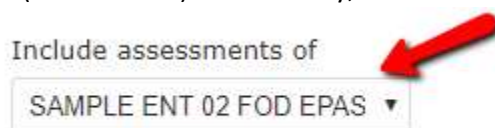
5. Select all the EPAs you wish to see in the report.

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.

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.

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).

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.

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?

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

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

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 superviso

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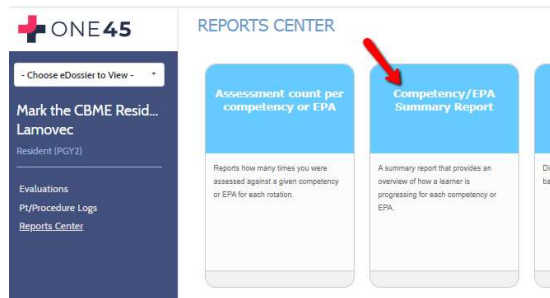
2. Specify the date range and mapping list you want to report on and click *View Report*. (for your more senior residents, you may need to include multiple years to capture all the EPAs for that stage.)
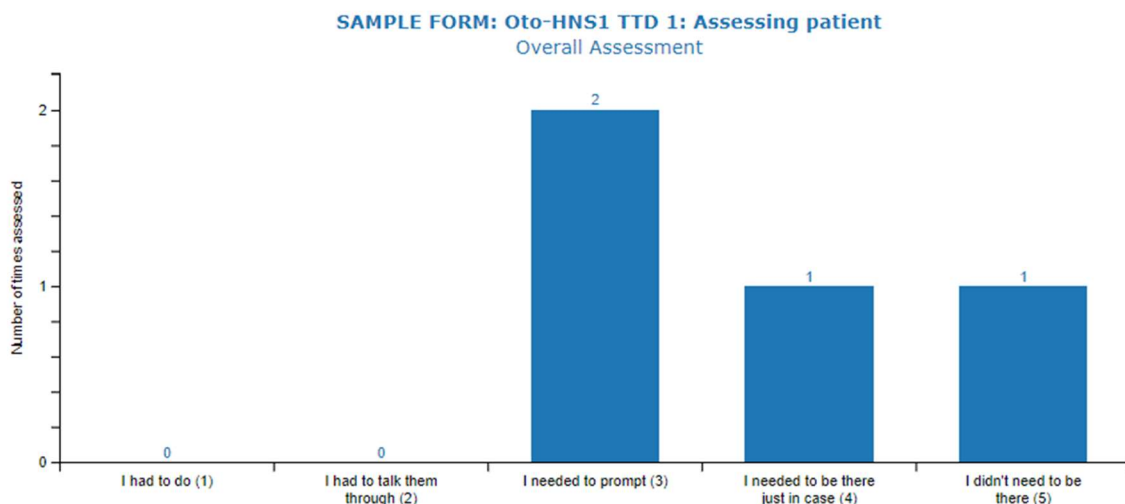

3. one45 will generate, for each EPA in that list, a series of mini-reports in one screen. The first mini-report is a bar graph that shows you the number of forms completed for that EPA and the score from each form's Overall Assessment question.

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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.

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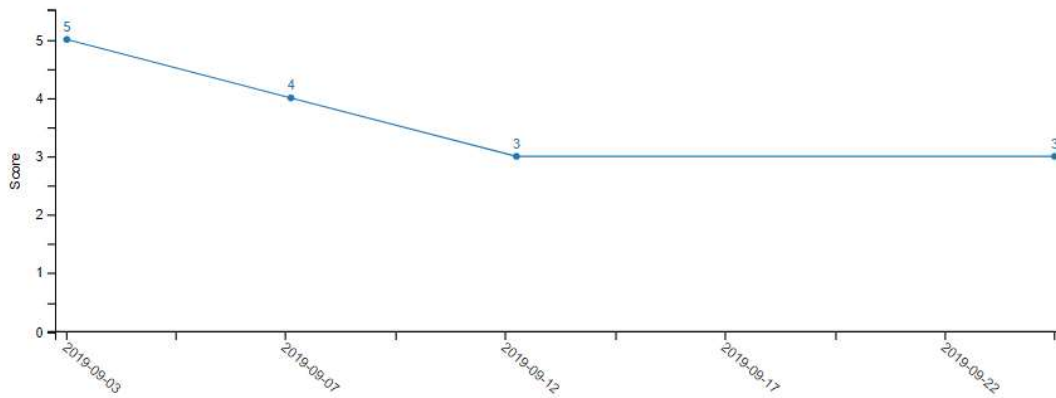
5. If you hover with your mouse over each plot on the trajectory report, it will give you a brief summary of the completed EPA form.

Trajectory summary

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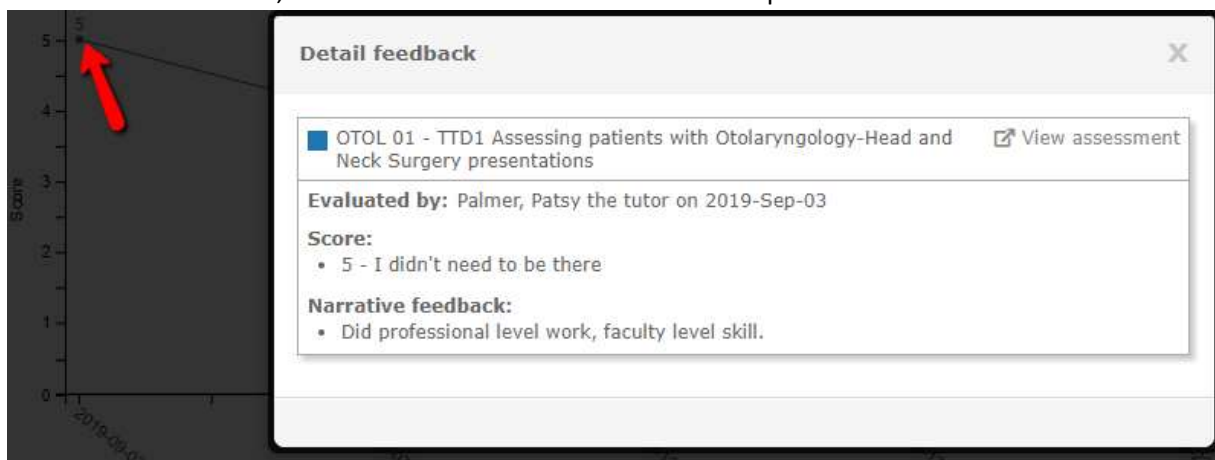
7. Click *View assessment* to view that completed EPA form. It will open in a new window.

TTD1 Assessing patients with Otolaryngology-Head and ☐ View assessment
ery presentations

y: Palmer, Patsy the tutor on 2019-Sep-03

't need to be there

edback:

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

Dalhousie University
Sample CBME

Evaluated By : Palmer, Patsy the tutor (Attending)
Evaluating : **Moy the CBME Resident, Bonny (Resident) - PGY1**
Rotation : 01 - Transition to Discipline (Sample CBME Otolaryngology)
Dates : Sep 3, 2019
Completed on : Sep 26, 2019

* indicates a mandatory response

Otolaryngology - Head and Neck Surgery: Transition to Discipline EPA #1

Assessing patients with Otolaryngology-Head and Neck Surgery presentations

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

*Type of observation
Direct Observation

*Consult Type
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

No likert scores have been given for this competency or EPA.

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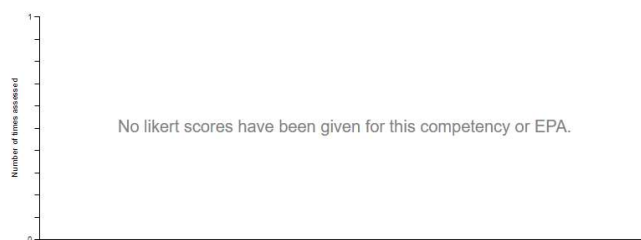
11. You can return to the Reports Center by clicking the *Reports Center* link at the top of the page.

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 06/30/2020
Include assessments of: SAMPLE ENT 01 TTD EPAS
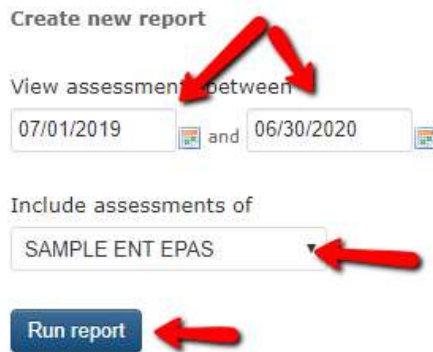Generated on: 06/29/2020

< Reports Center   ⚙ Create new report ▾

- Choose eDossier to View -   ▾

Mark the CBME Resid...
Lamovec

Resident (PGY2)

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.

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 peritonsillar	0	0	2	1	3

Other Reports In The Report Center

Other reports that you wish to review are also listed in the report center.
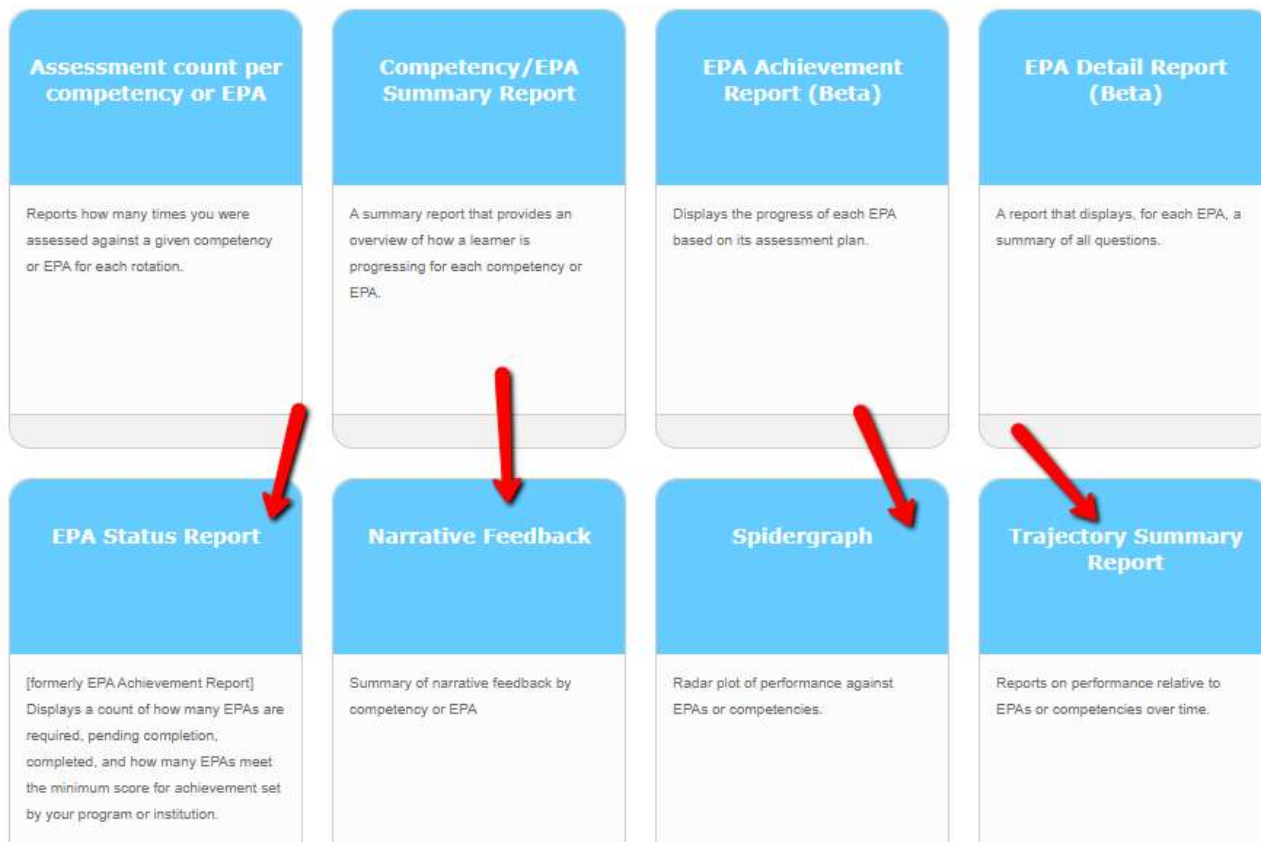
Trajectory Summary Report

The Trajectory Summary Report combines the trajectory lines from all the EPAs in a mapping list into one chart.
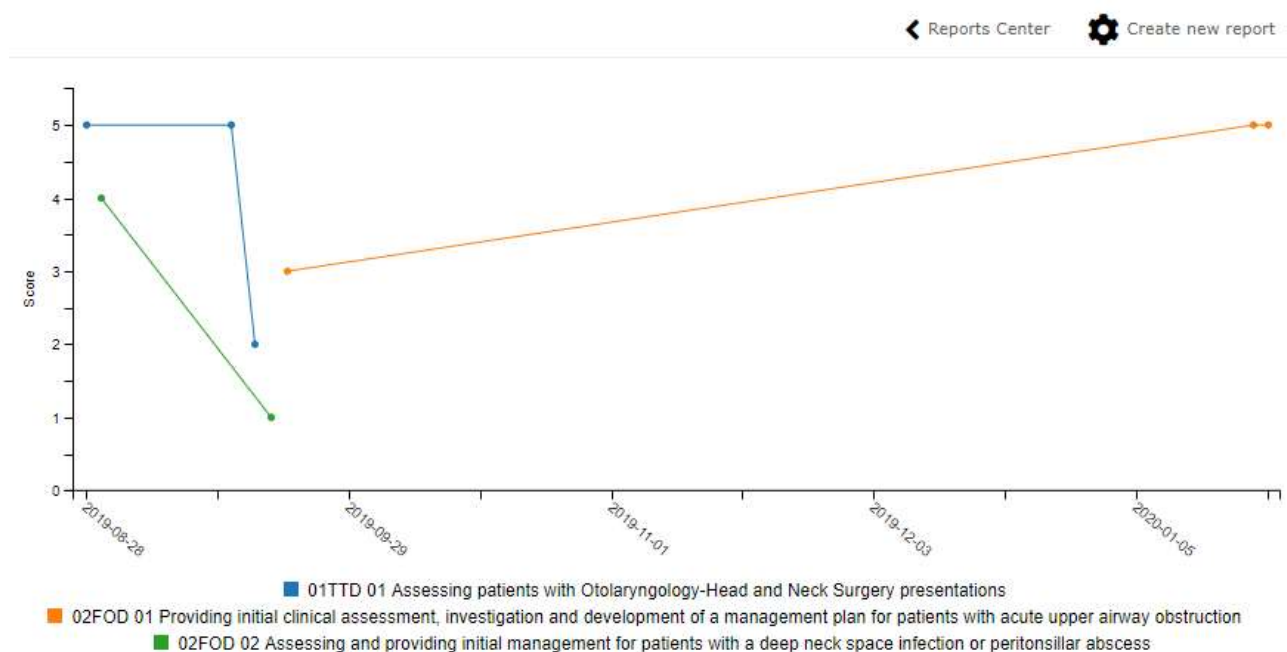
You can click on the EPA names in the table legend at the bottom to turn them off from the view.

■ 01TTD 01 Assessing patients with Otolaryngology-Head and Neck Surgery presentations
■ 02FOD 01 Providing initial clinical assessment, investigation and development of a management plan for patients with acute upper airway obstruction
■ 02FOD 02 Assessing and providing initial management for patients with a deep neck space infection or peritonsillar abscess

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

❮ Reports Center　　◉ Show/hide columns ▾　　▼ Filters ▾　　⚙ Run new report ▾

[Excel]　[Search]

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	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.

‹ Reports Center   ◉ Show/hide columns ▾   ▼ Filters ▾   ⚙ Run new report ▾

Excel   Search

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.

SPIDERGRAPH (R. MARK THE RESIDENT LAMOVEC)

Radar plot of performance against EPAs or competencies.

‹ Reports Center   ⚙ Create new report ▾
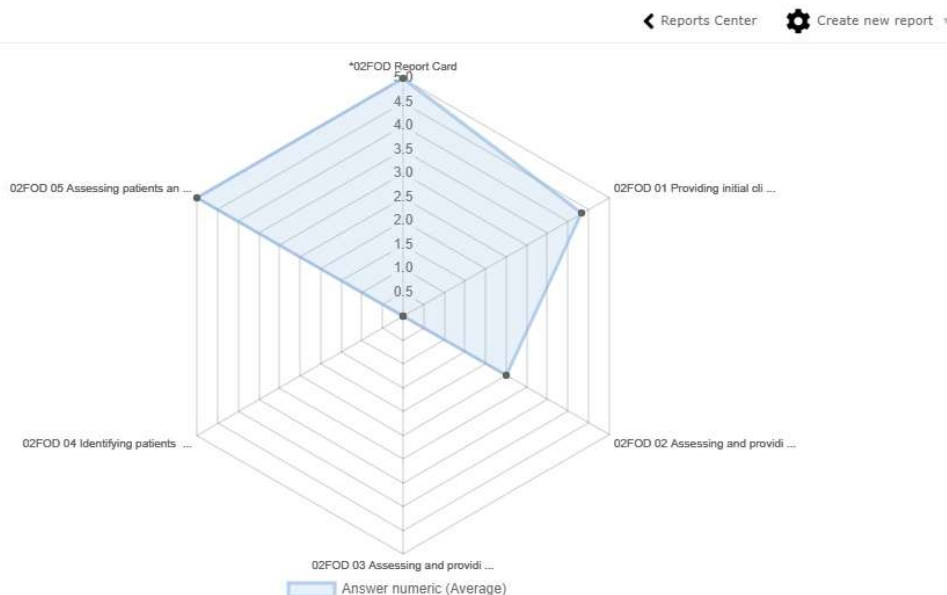
Reviewing Individual ITERS

The Mentor tool can also provide you with access to all of a resident's evaluation forms including ITERs from their various rotations. If your PA has set you up as a mentor of your resident, you can use this report.

1. Log into your one45 account.

2. Click on the dropdown in your eDossier (ToDos page of one45) and select a resident under *Mentees* to view.
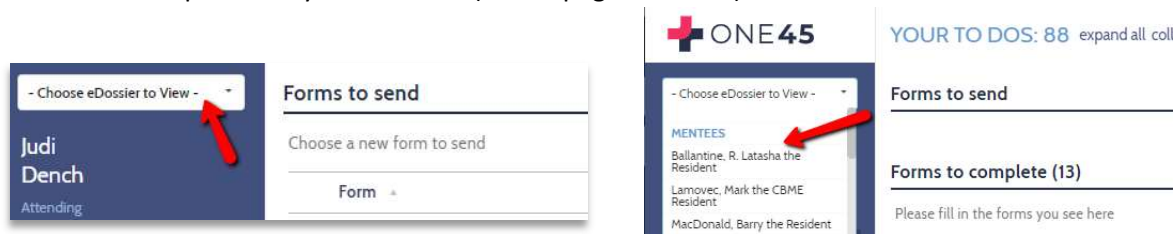
3. Click *Evaluations* to access the list of completed forms on the resident.
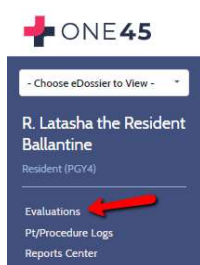
4. A list of Evaluations will appear. You can see the rotation the form was sent on, the date of the event, the date the evaluator completed it, and the date it was confirmed by the resident.

5. Unfortunately, form names are not listed, and form name is how one identifies the specific EPA the resident was evaluated on. To know which form was used, mouse over the evaluator and the form name will appear.

6. To view an evaluation, click the name of the evaluator. The form with all its details will open in a new window.

7. When a preceptor's name is not linked this indicates the form has not been completed. You can click on the *P* if you wish to review the *empty* form.

8. Where you see multiple forms with one labelled *r* or *h*, know that these indicate a releaser or head form along with their contributor forms. In these cases, multiple faculty evaluated the resident and one faculty member either summarized those contributions or summarized them along with their own comments. The red admin indicates that the resident does not get to see those contributor forms but this is not always the case. Not all departments use head or releaser forms so you may not see these.

USING THE ROTATION HEAD TOOL

Your PA may assign you as a "rotation head" to the CBME rotations used to schedule the residents and send out EPA forms. If you have this access, you will be able to access the following features. Now that the EPA Detail Report has been released, you may not have a need for this access.
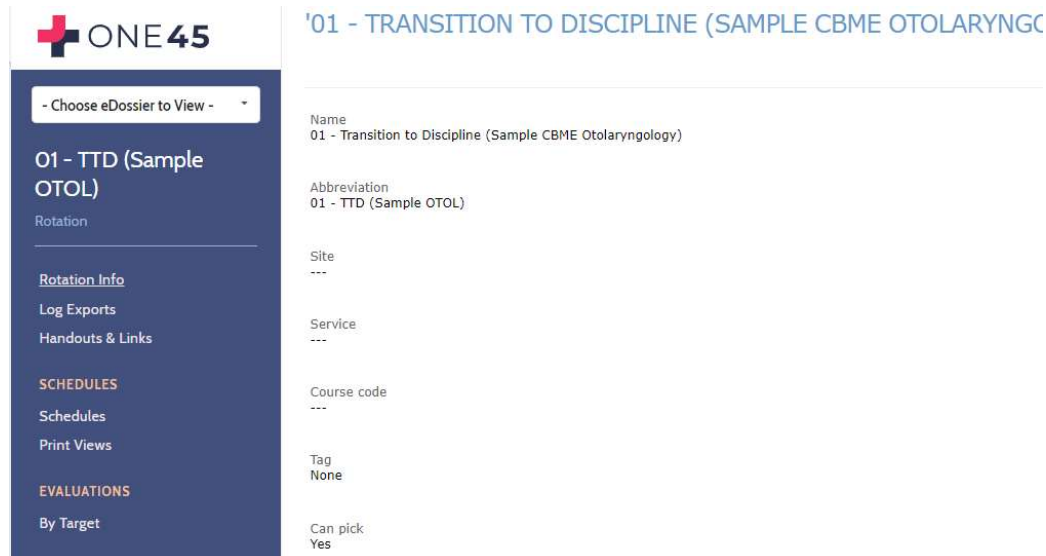
1. To begin, click the dropdown called Choose eDossier to View, located in the top right corner of your ToDos.
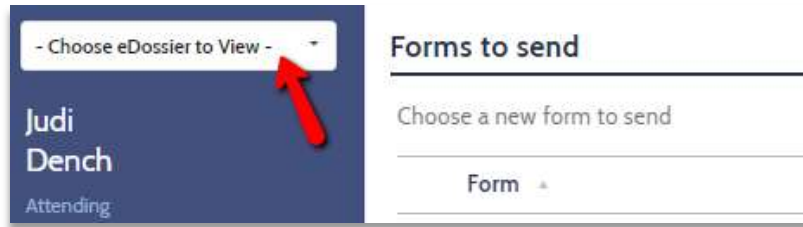
2. Pick the CBME rotation you wish to examine under the Rotations heading.
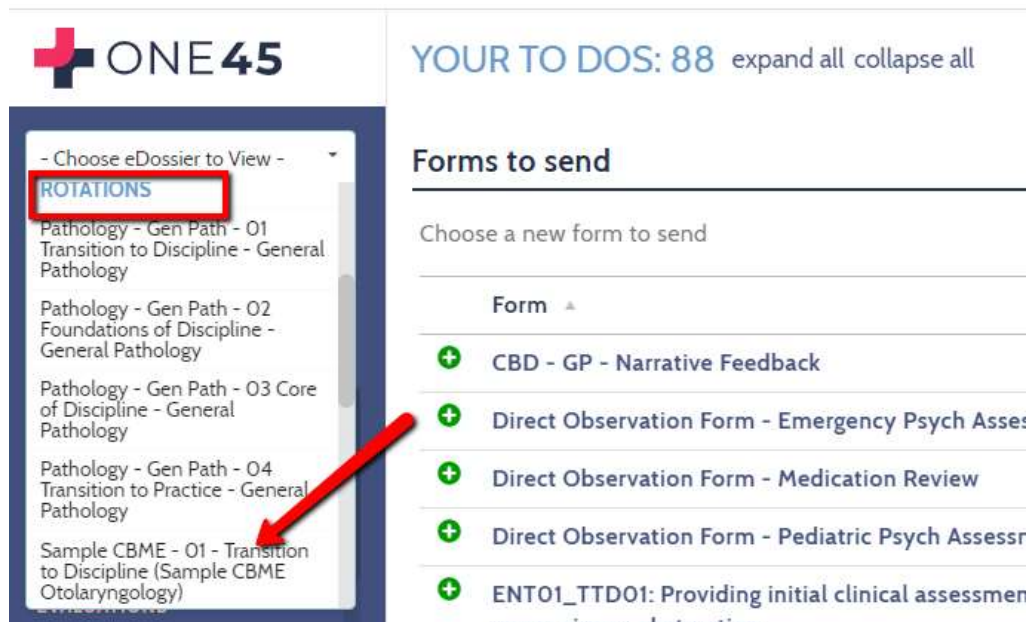
3. You will be taken to a Rotation eDossier. Continue on for instructions on how to access the reports from here.

Evaluations by Target

Evaluations by Target will allow you to see all the EPA forms (not ITERs) for a resident in one place. **Once you have accessed the Rotation Head tool (above),** follow the instructions below to access the Evaluations by Target feature.
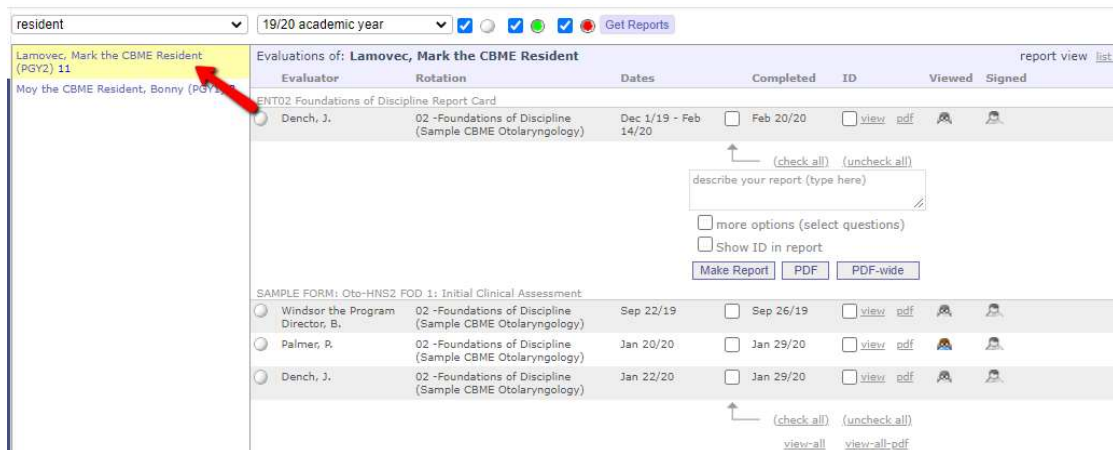
1. Click By Target under Evaluations in the side menu.
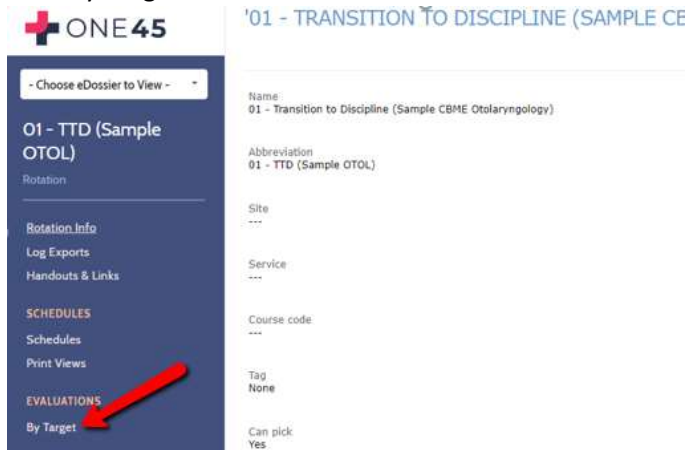
2. Click *Evals of* and select resident, select the date range you are interested in, and click *Get Reports*. Note: You can select a wide date range if you want to look at a multiple year span.
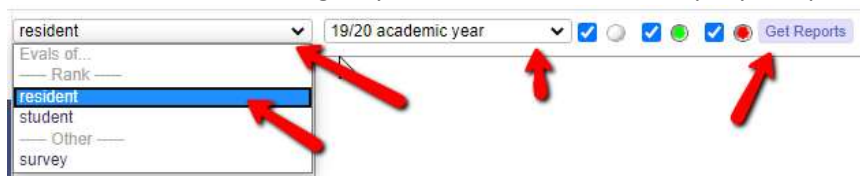
3. A list of residents will appear. Click on one of the residents to access their EPA forms.

4. For each EPA form, individual results will be listed. You can view those individual forms by clicking *view* for each one.

5. You can also look at all the INDIVIDUAL forms in one document. Click *check-all* then *view-all* and one45 will open a new tab, listing each form one after the other on the same page. *View-all-pdf* will do the same thing but put it in a pdf.

6. This is the view of each EPA form one after the other.

Evaluated By : Windsor the Program Director, Barbara (Attending)
Evaluating : Lamovec, Mark the CBME Resident (Resident) - PGY2
Rotation : 01 - Transition to Discipline (Sample CBME Otolaryngology)
Dates : Aug 28, 2019
Completed on : Sep 26, 2019

* indicates a mandatory response

Otolaryngology – Head and Neck Surgery: Transition to Discipline EPA #1

Assessing patients with Otolaryngology-Head and Neck Surgery presentations

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

*Type of observation
Direct Observation

*Consult Type
Emergency

7. You can also SUMMARIZE all the instances of each EPA into one report. For each EPA click *check-all*, to select all the forms, enter a name for the report, and click *Make Report* (or PDF if you prefer it in that format). one45 will then generate a SUMMARY of that EPA's forms with averages and counts. You can also make a PDF of this as well.

8. You can then see a summary of assessment plan information, Global Ratings Scales, etc. However, this report won't be helpful in trying to isolate if the context requirements were met because it is summarizing ALL the instances of the EPA, including the ones requiring assistance from the preceptor. In the example below, at least one successful Emergency consult is required but we don't know by looking at the summary if the two emergency consults noted occurred at the time of the two "I didn't need to be there" ratings or when the other rating was given.

9. If you know which dates the resident had observations of achievement for that EPA, you can run the report based ONLY on those results. You can also mark them green or red.

10. The resulting report will provide a summary of just the observations of achievement. This means any contextual information in the assessment plan WOULD have been part of the observations of achievement. In the example below, the resident has met all requirements for successfully completing that EPA.

Otolaryngology – Head and Neck Surgery: Transition to Discipline EPA #1
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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

Type of observation
2 Direct Observation
0 Indirect Observation

Consult Type
1 Emergency
1 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	0	0	0	2	2	5.0

MILESTONES

	Not observed	In Progress	Achieved	N	Mean
Elicit a basic head and neck history	0	0	2	2	2.0
Synthesize patient information including symptoms, differential diagnosis, and treatment plan clearly and concisely	0	0	2	2	2.0
Perform a head and neck physical exam	0	0	2	2	2.0
• Use of microscope for otoscopy					
• Pneumatic otoscopy	0	0	2	2	2.0
• Tuning fork tests (Weber and Rinne)	0	0	2	2	2.0
• Use of headlight for anterior rhinoscopy and examination of oral cavity	0	0	2	2	2.0
• Palpation of neck, including thyroid	0	0	2	2	2.0
• Examination of cranial nerves	0	0	2	2	2.0
Organize information in appropriate sections within an electronic or written medical record	0	0	2	2	2.0
	0	0	18	18	2.0

NOTE: You cannot combine multiple EPAs' forms into one report. The reports have to be based on one EPA. Example: You cannot summarize EPA 1, EPA 2, and EPA 3 into one report because they are different forms with different questions. Use the EPA Detail Report in the resident's Report Center for such a summary.

Log Exports

Evaluations by Target will allow you to see all the EPA forms (not ITERs) for a resident in one place. **Once you have accessed the Rotation Head tool (above),** follow the instructions below to access the Evaluations by Target feature.

1. If your department makes use of the log tool, click on *Log Exports*.
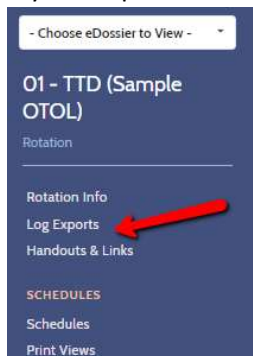
2. Pick the log and the competency list you wish to export.

3. Pick the competency items and questions you wish to include. You can quickly check all to pick all items.

4. Select a date range, if feedback is enabled for your log, check it, and export the report.

5. The report will export to Excel as a download. Open it.

6. The report will list the log entries for all residents.

Name	Rotation	Date Ente	Levels/gra	Date	Preceptor	Identify the Procedure	Was this procedure:	My strengths are...	My areas of improvemen t are...	I agree with the student's observations .	Clerk Strengths	Clerk Area of Improvemen t
Barry Macdonald	01 TTD	02-20-202	PGY3	02-20-202	Judi Denc	Arterial line insertion	Prompted	I communicat ed well with the patient	I need more practice in simulation as I made the patient uncomfortab le	Yes	They are correct that they communicat ed well.	They definitely need simulation experience as that should have gone smoothly

Handouts and Links

Any documents that the PA has attached to the rotation will appear in the Handouts and Links section. Some PAs have attached their list of EPAs for each stage to those rotations. If your PA has documents listed, click Handouts and Links to access them.