COMPETENCE COMMITTEES AND ONE45

Accessing Resident Information in one45

Kevin French Rev. June 2020 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.

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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.

- From your one45 account, click on the dropdown in your 1. 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.

EPA Status

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.)

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

A Mark achieved

02FOD 01 Providing initial clinical assessment, investigation and development of a management plan for

Choose eDossier to View

Evaluation status	Count
Expired/deleted	0
Pending	2
Completed	2
Completed with a min. overall score of 4	1

patients with acute upper airway obstruction

100%

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





Forms to send



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.



rm: SAMPLE FORM: Oto-HNS	1 TTD 1: Ass	essing patient					
Otolaryngology - H	lead and	Neck Su	irgery:	Transitior	n to Disci	pline EPA #:	L
Assessing patients presentations	with Ot	olaryngo	logy-Hea	ad and N	eck Surg	ery	
Key Features: - This EPA includes performing a histo	ry and examinati	on focusing on the	head and neck,	synthesizing the c	ase and presenting	g to supervisor	
Assessment Plan: Supervisor or delegate does assessme	nt based on dire	ct or indirect obser	vation with revie	w of consult letter			
Collect 3 observations of achieven - At least 1 emergency consult - At least 3 different assessors	nent:						
Type of observation 3 Direct Observation 0 Indirect Observation	_						
Consult Type 2 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		
Overall Assessment	0	0	0	2	1		
MILESTONES							
	1	In Progress		Achieved			
Elicit a basic head and neck history		1		2	-		
Synthesize patient information including symptoms, differential		1		2			

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

- 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 minireports. 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.



OTOL 01 - TTD1 As

Trajectory summary

- 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.

ery presenta		assessment
y: Palmer, Pa	atsy the tutor on 2019-Sep-03	
't need to be	there	
edback:		
euback.		
euback.		
euback.		

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

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
*Consult Type Emergency

 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.

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

🚽 ONE 45	REPORTS CENTER			
- Choose eDossier to View - * Mark the CBME Resid Lamovec	Assessment count per competency or EPA	Competency/EPA Summary Report	Ees Achievement Report (Beta)	EPA Detail Report (Beta)
Resident (PGY2) 	Reports how many times you were assessed against a given competency or EPA for each rotation.	A summary report that provides an overview of how a learner is progressing for each competency or EPA.	Displays the progress of each EPA based on its assessment plan.	A report that displays, for each EPA, a summary of all questions.
	EPA Status Report	Narrative Feedback	Spidergraph	Trajectory Summary 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.

Create new	report	
💙 iew assessm	nents between	

 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.

			A 2008 AV-	i l	
- Choose eDossier to View - 🔹	Heads up! This report is in beta and may not Please contact us at product@one45.com to give us	be accurate. Please use caution when making judgments base your feedback on this report.	d on this data.		
Aark the CBME Resid			Kepc	orts Center 🛛 📩 Cr	reate new report
amovec					
lesident (PGY2)					🔒 Print
valuations	01TTD 01 Assessing patients with	Otolaryngology-Head and Neck Surgery pres	sentations		
	V				
t/Procedure Logs					
Reports Center	EPA Status 100%	Service Mark achieved			
teports Center	EPA Status	And the second s			
Reports Center	EPA Status	Mark achieved			
eports Center	EPA Status	Mark achieved Counted toward required observation	s Required	Progress	-
<u>eports Center</u>			s Required	Progress 100%	
<u>eports Center</u>	Criteria	Counted toward required observation		Control (Science)	
eports Center	Criteria Collect 3 observations of achievement	Counted toward required observation	3	100%	
<u>eports Center</u>	Criteria Collect 3 observations of achievement • At least 1 emergency consult	Counted toward required observation 3	3	100% 200%	
<u>eports Center</u>	Criteria Collect 3 observations of achievement • At least 1 emergency consult	Counted toward required observation 3	3	100% 200%	
<u>eports Center</u>	Criteria Collect 3 observations of achievement • At least 1 emergency consult	Counted toward required observation 3	3	100% 200%	5
<u>eports Center</u>	Criteria Collect 3 observations of achievement • At least 1 emergency consult • At least 3 different assessors	Counted toward required observation 3 1 3	3	100% 200%	
<u>eports Center</u>	Criteria Collect 3 observations of achievement • At least 1 emergency consult • At least 3 different assessors Evaluation status	Counted toward required observation 3 1 3 Count Count	3	100% 200%	
Reports Center	Criteria Collect 3 observations of achievement • At least 1 emergency consult • At least 3 different assessors Evaluation status Expired/deleted	Counted toward required observation 3 1 3 Count 0	3	100% 200%	8 5 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).



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.

SF1TT	D-EPA 01: Performing the	preoperative preparation of patients for basic surgical procedures
EPA Status	100%	Ark achieved

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
EPA Status 100%	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.

PA Status 0% Aark ad	chieved		
riteria	Counted toward required observations	Required	Progress
collect 5 observations of achievement	Counted toward required observations	Required 5	Progress

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	0%

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.

Criteria	Counted toward required observation		Progress
Collect 1 observations of achievement	1	1	100%
 At least one emergent case 	1	1	100%
Evaluation status	Count		
Evaluation status Expired/deleted	Count 0		
an and the second se	Contract of the second		
Expired/deleted	0		

- 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."

O2FOD	04 Identifying patients pre	senting with an anticipated difficult airway and preparing for initial management options
EPA Status	0%	V 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.

PA 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.

	N			
View in other reports:	Competency/EPA Summary Report	Assessment Count per Competency/EPA	PA Status Report	PA Detail Report

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.

🚽 ONE 45	REPORTS CENTER			
- Choose eDossier to View - • Mark the CBME Resid Lamovec	Assessment count per competency or EPA	Competency/EPA Summary Report	EPA Achievement Report (Beta)	EPA Detail Report (Beta)
Resident (PGY2) Evaluations Pt/Procedure Logs <u>Reports Center</u>	Reports how many times you were assessed against a given competency or EPA for each rotation.	A summary report that provides an oveniew of how a learner is progressing for each competency or EPA.	Displays the progress of each EPA based on its assessment plan.	A report that displays, for each EPA, a summary of all questions.

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*.

Include assessments of	
SAMPLE ENT 02 FOD EPAS	•

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



- 🗹 02FOD 03 Assessing and providing initial management for patients with nasal obstruction
- 🗹 02FOD 04 Identifying patients presenting with an anticipated difficult airway and preparing for initial management options

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		
	100% (2/2)	
Cancel		

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.

💠 ONE 45	EPA DETAIL REPORT (MARK THE CBM A report that displays, for each EPA, a summary of all questions.	E RESIDENT	LAMOVEC)					
- Choose eDossier to View - *	B Heads up! This report is in beta and may not be accurate. P product@one45.com to give us your feedback on this report.	lease use caution whe	n mailong judgments based on this	data. Please contact us at				
Mark the CBME Resid Lamovec Resident (PGY2)	-						Reports Center	Critate new report *
Evaluations	02FOD 01 Providing initial clinical assessment, in	vestigation and	development of a manag	ement plan for pati	ients with acute uppe	r airway obstruction		
Pt/Procedure Logs	Form: SAMPLE FORM: Oto-HNS2 FOD 1: Initial Clin	ical Assessment						
Reports Center	Otolaryngology - Head and Neck S	Surgery: Fou	undations of Discip	line EPA #1				
	Providing initial clinical assessmer obstruction	nt, investiga	tion and developm	ent of a mana	agement plan fo	r patients with a	cute upper ai	irway
	Kay Features: The observation of this EPA is divided into two parts: patient as -The patient assessment aspect of this EPA may include perform			stomy: open tracheotomy,	percutaneous tracheotomy, c	ricothyroidatomy)		
	Assessment Plan: Part A: Patient Assessment Supervisor does assessment based on direct or indirect observat	tion						
	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	1 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 colleagues and engage them immediately		0		3			
	Edentify and differentiate normal and abnormal findings in history and physical exam		1		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).



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.

2FOD 01 Providing initial clinic pper airway obstruction	al assessmer	it, investigatio	on and develo	pment of a m	anagement pl	an for patients with ac
Form: SAMPLE FORM: Oto-HNS2	FOD 1: Initial	Clinical Asses	sment			
Otolaryngology - H	ead and	Neck Sur	gery: Fo	undations	of Discip	line EPA #1
Providing initial clin management plan						
Key Features: -The observation of this EPA is divided in tracheotomy, cricothyroidotomy) -The patient assessment aspect of this E					racheostomy: open	i tracheotomy, percutaneous
Assessment Plan: Part A: Patient Assessment Supervisor does assessment based on d Collect 1 observation of achievement -At least one emergent case Case scenario 3 Emergent 0 Elective		oservation				
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	1	
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?



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 hea	d and neck, synth	nesizing the case an	d presenting to supervi	
Assessment Plan: Supervisor or delegate does assessment	based on direct o	or indirect observatio	on with review of	consult letter		
Collect 3 observations of achievement - At least 1 emergency consult - At least 3 different assessors	nt:					
Faculty Initial and Last Name (e.g. K • B Windsor	. French)					
Type of observation 1 Direct Observation 0 Indirect Observation						
Consult Type 1 Emergency 0 Non-Emergency	11-11-7					
	I had to do	them through	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				N		
		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.

Do y	
	ou have any concerns regarding this Learner's professionalism?
1 N	15 n
Do y	ou have any concerns regarding Patient Safety?
	15
1 N	
If yes	description of Concern:
	and the second
	03 Assessing and providing initial management or patients with nasal obstruction SAMPLE FORM: Oto-HNS2 FOD 3: Nasal Obstruction
Form:	
Form: Ot	SAMPLE FORM: Oto-HNS2 FOD 3: Nasal Obstruction
Form: Oto As: Key F	SAMPLE FORM: Oto-HNS2 FOD 3: Nasal Obstruction

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.)

		Reports Center
Create new	report	
View assessm	entstetween	
07/01/2018	and 06/30/2020	
Include assess	sments of	
SAMPLE ENT	FPAS	

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



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.

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.



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
Supervisor or delegate does assessment based on direct or indirect observation with review of consult letter
Collect 3 observations of achievement:
- At least 3 different assessors
Type of observation
Type of observation

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.

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.

*Consult Type Emergency

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.



View assessments between: 07/01/2019 and 06/30/2020 Include assessments of: SAMPLE ENT 01 TTD EPAS Generated on: 06/29/2020

Report details



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*.



 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.

		Report	s Center 🗿 Sho	w/hide columns 🔻 🍸 Fil	ters v 🏟 Run new repo
				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	o	Q	3	2	3
02FOD 01 Providing initial clinical assessment, investigation and development of a management plan for patients with acute upper airway obstruction	O	0	3	2.	t
02FOD 02 Assessing and providing initial management for patients with a deep neck space infection or paritancillar	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.

REPORTS 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.

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

	< Rep	oorts Center 🛛 🔘	Show/hide columns *	Filters *	🛱 Run new rep	ort
Competency or EPA name	Start date	End date	Evaluator name	cel Search	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 Cer	iter 🗿 Shor	w/hide columns *	Filters •	Run new repo
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	٥	3	Ø	0	Q	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.



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.

		+ ONE 45	YOUR TO DOS: 88 expand all coll
- Choose eDossier to View -	Forms to send	- Choose eDossier to View -	Forms to send
udi Dench	Choose a new form to send	MENTEES Ballantine, R. Latasha the Resident	Forms to complete (13)
Attending	Form .	Lamovec, Mark the CBME Resident MacDonald, Barry the Resident	Please fill in the forms you see here

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.

🕂 ONE 45	R. Latasha the Resident Ballantine's Evaluations			Of Me By Me		confirmed
- Choose eDossier to View - 🔹		from	to	evaluator (print)	done	viewed by me
R. Latasha the Resident	01 - Transition to Discipline (Otolaryngology) (Workshop - CBME)	Oct 23	Oct 23 2019	Dench, Judi	Feb 28/19	
R. Latasna the Resident Ballantine	Surgical Foundations - Transition to Discipline (Surgical Foundations)	Jun 18	Jun 18	Epstein, Ian Leonard	Jul 03/19	Jul 03/19
Resident (PGY4)	Dermatology (Workshop - CBME)	Aug 22	Sep 18 2018	<u>Dench, Judi</u> h <u>Dench, Judi</u> admin Palmer, Patsy the tutor admin	Feb 15/19 Nov 19/18 Nov 19/18	
<u>Evaluations</u>	Emergency (Workshop - CBME)	Jul 25	Aug 21	Palmer, Patsy the tutor	Nov 19/18	Nov 19/18
Pt/Procedure Logs Reports Center	CVICU (Workshop - CBME)	Jul 01	Jul 24	Windsor the Program Director, Barbara	Nov 19/18	Nov 19/18

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.

one 45	R. Latasha the Resident Ballantine's Evaluations			ſ	Of Me By Me		confirmed
- Choose eDossier to View - *		from	to	e	valuator (print)	done	viewed by me
	01 - Transition to Discipline (Otolaryngology) (Workshop - CBME)	Oct 23	Oct 23	2019 D	ench, Judi	Feb 28/19	•
R. Latasha the Resident Ballantine	Surgical Foundations - Transition to Discipline (Surgical Foundations)	Jun 18	Jun 18	E	SAMPLE FORM: Oto-HN	IS2 FOD 01: Initial (Clinical Assessme
Resident (PGY4)	Dermatology (Workshop - CBME)	Aug 22	Sep 18	2018 <u>D</u>	ench, Judi_ h	Feb 15/19	
				D	ench, Judi <mark>admin</mark>	Nov 19/18	
				P	almer, Patsy the tutor admin	Nov 19/18	
Evaluations	Emergency (Workshop - CRME)	Jul 25	Aug 21	P	almer, Patsy the tutor	Nov 19/18	Nov 19/18

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

R. Latasha the Resident Ballantine's Evaluations		Of Me By Me	pdf p
	from to	evaluator (print)	Dalhousie University Workshop - CBME
01 - Transition to Discipline (Otolaryngology) (Workshop - CBME)	Oct 23 Oct 23	20 Sench, Judi	Evaluated By : Dench. (udi (Attending)
Surgical Foundations - Transition to Discipline (Surgical Foundations)	Jun 18 Jun 18	Epstein, Ian Leonard	Evaluating : Ballantine, R. Latasha the Resident (Resident) - PGY4
Dermatology (Warkahop - CBME)	Aug 22 Sep 18	2018 <u>Dench, Judi</u> , h <u>Dench, Judi</u> admin Palmer, Batsy, the tutor admin	Rotation : OI - Transition to Discipline (Otolaryngology) Dates : Oct 23. 2019 Completed on : Feb 28. 2019
Emergency (Workshop - CBME)	Jul 25 Aug 21	Palmer, Patsy the tutor	
CVICU Workshop - CBME)	Jul 01 Jul 24	Windsor the Program Director, Ba	* indicates a mandatory response
			nanagement plan for patients with acute upper airway obstruction 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
			- At least 1 emergency consult - At least 3 different assessors "Type of observation
			- At least 1 emergency consult - At least 3 different assessors

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.

01 - Transition to Discipline (Otolaryngology) (Workshop - CBME)	Oct 17	Oct 17 201	B Dench, Judi
02 - Foundations of Discipline (Otolaryngology) (Workshop - CBME)	Sep 06	Sep 06	Windsor the Program Director, Barbara
Dermatology (Workshop - CBME)	Aug 22	Sep 18	Dench, Judi h

8. Where you see multiple forms with one labelled *r* or *h*, know that these indicate a releasor 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 releasor forms so you may not see these.

R. Latasha the Resident Ballantine's Evaluations				Of Me By Me	
	from	to		evaluator (print)	done
01 - Transition to Discipline (Otolaryngology) (Workshop - CBME)	Oct 23	Oct 23	2019	Dench, Judi	Feb 28/19
Surgical Foundations - Transition to Discipline (Surgical Foundations)	Jun 18	Jun 18		Epstein, Ian Leonard	Jul 03/19
Dermatology (Workshop - CBME)	Aug 22	Sep 18	2018	Dench, Judi h	Feb 15/19
			[Dench, Judi admin	Nov 19/18
			- 1	Palmer, Patsy the tutor admin	Nov 19/18
Emergency (Workshop - CBME)	Jul 25	Aug 21		Palmer, Patsy the tutor	Nov 19/18
CVICU (Workshop - CBME)	Jul 01	Jul 24		Windsor the Program Director, Barbara	Nov 19/18

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.

- ONE 45	'01 - TRANSITION TO DISCIPLINE (SAMPLE CBME OTOLARYNG)
- Choose eDossier to View - *	Name 01 - Transition to Discipline (Sample CBME Otolaryngology)
01 - TTD (Sample	
OTOL)	Abbreviation
	01 - TTD (Sample OTOL)
	Site
Rotation Info	
Log Exports	
Handouts & Links	Service
SCHEDULES	Course code
Schedules	
Print Views	
EVALUATIONS	Tag None
By Target	Can pick Yes

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.

PONE45	'01 - TRANSITION TO DISCIPLINE (SAMPLE CE
- Choose eDossier to View - *	Name
01 - TTD (Sample	01 - Transition to Discipline (Sample CBME Otolaryngology)
OTOL) Rotation	Abbreviation 01 - TTD (Sample OTOL)
	Site
Rotation Info	1000
Log Exports	0.001 - 02
Handouts & Links	Service
SCHEDULES	Course code
Schedules	and
Print Views	percentry
EVALUATIONS	Tag None
By Target	Can pick Yes

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.

amovec, Mark the CBME Resident PGY2) 11	A ALCONOLO INCLUE A ALCONOLO INCLUE	ec, Mark the CBME Resident					report view <u>list</u>
loy the CBME Resident, Bonny (PGY1	Evaluator	Rotation	Dates	Completed	ID	Viewed	Signed
by the come nesident, bonny (POTA	ENTO2 Foundations of Dis						
	Dench, J.	02 -Foundations of Discipline (Sample CBME Otolaryngology)	Dec 1/19 - Fe 14/20	b Feb 20/20	<u>view</u> <u>pdf</u>	A	<u>A</u> .
				Check al) (uncheck all)		
				describe your report (ty	oe here)		
					1	8	
				more options (sel	ect questions)		
				Show ID in report			
			1	Make Report PDF	PDF-wide		
	CAMDLE FORM: OHALUNG?	FOD 1: Initial Clinical Assessment					
	Windsor the Program Director, B,		Sep 22/19	Sep 26/19	<u>view</u> <u>pdf</u>	A	A .
	Palmer, P.	02 -Foundations of Discipline (Sample CBME Otolaryngology)	Jan 20/20	🗌 Jan 29/20	<u>view</u> <u>pdf</u>	<u>A</u>	A.
	Dench, J.	02 -Foundations of Discipline (Sample CBME Otolaryngology)	Jan 22/20	Jan 29/20	<u>view</u> <u>edf</u>	A	<u>A</u>
				C (check al) (uncheck all)		
				view-al	l view-all-pdf		

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.

	: Windsor the Program Director, Barbara (Attending) : Lamovec, Mark the CBME Resident (Resident) - PGY2
Rotation	: 01 - Transition to Discipline (Sample CBME Otolaryngology)
	: 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

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Key Features:
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- 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.

				-					
SAI	IPLE FORM: Oto-HNS1 7	TTD 1: Assessing patient							
0	Windsor the Program Director, B.	01 - Transition to Discipline (Sample CBME Otolaryngology)	Aug 28/19		Sep 26/19	ie) <u>view</u>	<u>pdf</u>	A	Ø.
0	Palmer, P.	01 - Transition to Discipline (Sample CBME Otolaryngology)	Sep 15/19	1	Sep 26/19	🗐 <u>view</u>	<u>p.df</u>	A	A.
0	Dench, J,	01 - Transition to Discipline (Sample CBME Otolaryngology)	Sep 18/19		Sep 26/19	<u>view</u>	<u>pdf</u>	A	Ø.
				1	(check all)	(uncheck	all)		
			-	-	view-all	view-all-	pdf		
				TTD Trans	sition to Disciplin	ne Report			
			~		e options (sele	et eusetier		1	
					v ID in report	er doestoi	121		
				Make Re		PDF-wi	de		

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.

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 4 Direct Observation 0 Indirect Observation					1	1		
Consult Type								
3 Emergency 1 Non-Emergency					-			
l had to do	1	had to talk them through	I needed to pro	ompt	I needed to be there just in case	I didn't need to be there	N	Mean
Overall Assessment 0		1	0		1	2	4	4.0
MILESTONES		Not observe	d	In P	rogress	Achieved	N	Mean
Elicit a basic head and neck history		Not observe	20	-111-1	1	3	4	1.8
Synthesize patient information including symptoms, differential diagnosis, and tr plan clearly and concisely	eatment	0			3	3	4	1.8
Perform a head and neck physical exam • Use of microscope for otoscopy		0			1	3	4	1.8
Pneumatic otoscopy		0			1	3	4	1.8
 Tuning fork tests (Weber and Rinne) 		0			1	3	4	1.8
 Use of headlight for anterior rhinoscopy and examination of oral cavity 		0			1	3	4	1.8
 Palpation of neck, including thyroid 		0			1	3	4	1.8
Examination of cranial nerves	1	0			1	3	4	1.8
Organize information in appropriate sections within an electronic or written medi	cal	0			1	3	- 4	1.8

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.

UDE FORME ONCUNCT 7	TD 1: Assessing patient					2004		
Windsor the Program Director, B.	01 - Transition to Discipline (Sample CBME Otolaryngology)	Aug 28/19		Sep 26/19	View View	<u>pdf</u>	凤	2
Palmer, P.	01 - Transition to Discipline (Sample CBME Otolaryngology)	Sep 15/19	1	Sep 26/19	view 🗌	<u>p.df</u>	A	P
Dench, J.	01 - Transition to Discipline (Sample CBME Otolaryngology)	Sep 18/19		Sep 26/19	view View	<u>pdf</u>	凤	2
		-		(<u>check all</u>) 	(uncheck view-all-	102		
•			TTD Trans	sition to Disciplir D	ne Report	1		
	_		and the second se	e options (sele v ID in report	ct question	ns)		
		-	Make Re	eport PDF	PDF-w	de		

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 Assessing patients with Oto Key Features: - This EPA includes performing a history and exam	laryngolo	gy-Head and I	Neck Surge	ery presentati			
Assessment Plan: Supervisor or delegate does assessment based on	direct or indirect o	bservation 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 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	I didn't need to be there	N	Mean
Overall Assessment	0	0	0	case 0	2	2	5.0
MILESTONES							
		Not observed	ir	1 Progress	Achieved	N 2	Mean
Elicit a basic head and neck history Synthesize patient information including symptoms, differential diagnos and concisely	is, and treatment plan clea	arly 0		0	2	2	2.0
Perform a head and neck physical exam + Use of microscope for otoscopy		0		0	2	2	2.0
Pneumatic otoscopy		0		0	2	2	2.0
 Tuning fork tests (Weber and Rinne) Use of headlight for anterior rhinoscopy and examination of oral cavit 	7	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 wri	ten medical record	0		0	2 18	2	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.

24 hour ABPM interpretation	
Arterial line insertion	
Bone marrow aspiration and biopsy	
Central line insertion	
Invasive ventilation management	
(check all) (uncheck all) estions to include:	
stions to include:	
stions to include:	
estions to include: Date Preceptor	

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.

2	A	B	C	D	E	F	G	н	1	J	к	L	M
	From 2019-07-01 to 2020-04-01												
	Report produced on 2020-04-01												
	Name	Rotation	Date Ente	Levels/gra	Date		Identify the Procedure	Was this procedure:	My strengths are	My areas of improvemen t are	I agree with the student's observations		Clerk Area of Improvemen t
	Barry Macdonald	01 TTD	02-20-202			udi Denci	Arterial line	Prompted	I communicat ed well with the patient	I need more practice in simulation as I made the patient uncomfortab Ie	Yes	They are correct that they communicat ed well.	They definitely need simulation experience as that should have gone smoothly

Handouts and Links

Handouts & 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.



Faculty of Medicine – MedIT (created by Kevin French, Nov 2019)