



COMPETENCE COMMITTEES AND ONE45

Accessing Resident Information in one45

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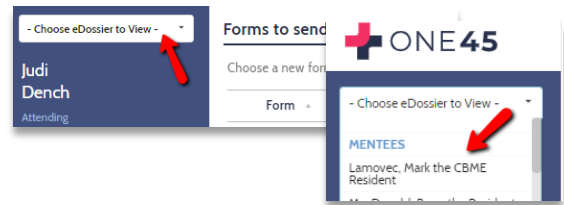
As a member of the competence committee, there are several options to review EPA forms and other documents for your residents. Check with your Program Administrator to see which options are available and then follow the directions below. The first guide is a quickstart guide to using the Competency/EPA 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.

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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.

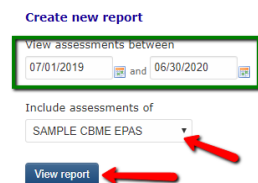
- From your one45 account, click on the dropdown in your eDossier (ToDos page of one45) and select a resident in the Mentees section to view.



- 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*.



- 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*.



- one45 will generate, for each EPA in that list, a summary of the contextual/assessment plan requirements for each EPA.

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

EPA Status: 36%

Mark Achieved

Criteria	Counted toward required observations	Required	Progress
Collect 5 observations of achievement	2	5	40%
• At least 1 deviated nasal septum	0	1	0%
• At least 3 rhinosinusitis including...	1	3	33%
• ...with 2 faculty observers	1	2	50%

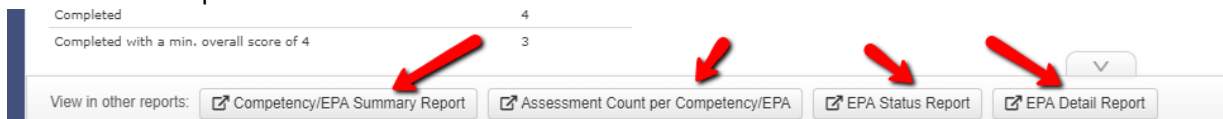
Encounter date	Sent date	Assessment cue	Evaluator	Count
Expired/deleted				4
2022/03/06	2022/03/15	-	Judi Dench the faculty	
2022/02/25	2022/02/25	The small child with a raisin in their nose	Judi Dench the faculty	
2021/06/30	2021/07/14	-	Sigourney Weaver	
2020/09/26	2020/09/28	-	Judi Dench the faculty	
Pending				0
Completed below score threshold				1
2020/03/11	2020/04/01	-	Judi Dench the faculty	
Completed meeting score threshold				2
2021/06/30	2021/07/14	-	Judi Dench the faculty	
2020/10/15	2020/10/15	-	Judi Dench the faculty	

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.)

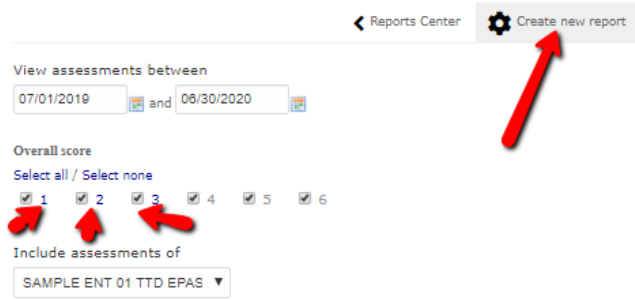
Evaluation status shows how many times they triggered it, if any are expired or pending (faculty didn't do them) and how many had a score of 4 or more.

- 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



- 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.



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

Form: SAMPLE FORM: Oto-HNS1 TTD 1: Assessing patient

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
 3 Direct Observation
 0 Indirect Observation

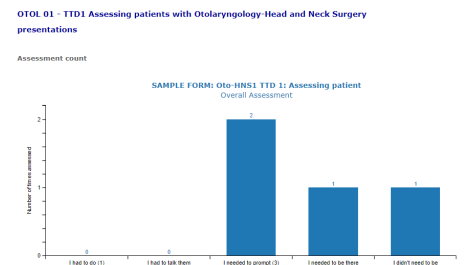
Consult Type
 2 Emergency
 1 Non-Emergency

	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

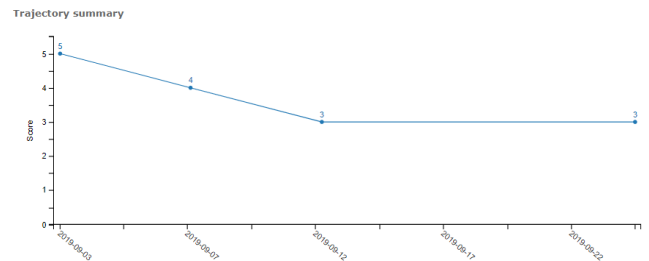
MILESTONES

	In Progress	Achieved
Elicit a basic head and neck history	1	2
Synthesize patient information including symptoms, differential	1	2

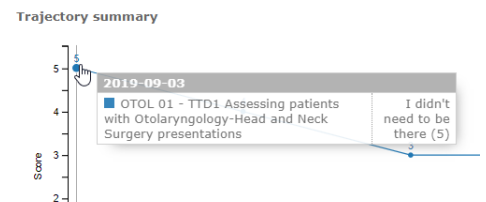
- If you wanted to look at individual instances of an EPA form, or check who the evaluators were for the observations of achievement, run the Competency/EPA Summary Report. This report will generate three mini-reports. The first one gives you a basic tally of the observations of achievement.



- 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.



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



- 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.

Detail feedback

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

Evaluated by: Palmer, Patsy the tutor on 2019-Sep-03

Score:
 • 5 - I didn't need to be there

Narrative feedback:
 • Did professional level work, faculty level skill.

[View assessment](#)

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

TTD1 Assessing patients with Otolaryngology-Head and Neck Surgery presentations [View assessment](#)

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

't need to be there

edback:

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

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

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.

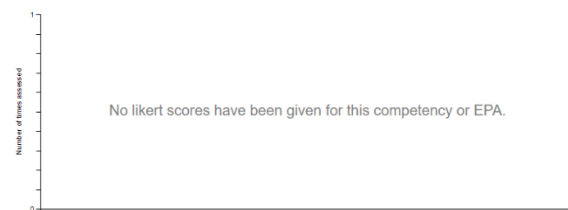
Narrative feedback

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



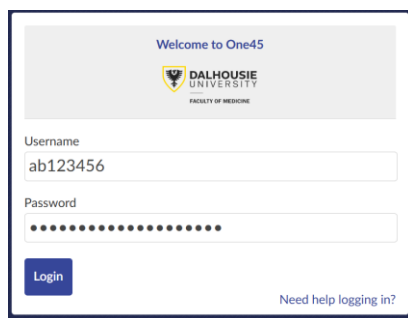
LOGGING IN TO ONE45

To review resident CBME reports, you will need to log into one45 at <https://one45.med.dal.ca>. Most faculty log in with a one45-created username and password, while others log in with their Dal NetID and password, usually by request of the faculty member or if they were recently a resident. Find instructions below based on the two options.

- If you are not sure which method you use to log in, try your Dal NetID and password first (option 1). If it doesn't work, try option 2. If it still doesn't work, email medit@dal.ca with subject line "one45 log in assistance."
- If you do not currently log in with your Dal NetID and password but would like to, email medit@dal.ca with subject line "one45 login with Dal NetID request" and provide your name and NetID and ask that MedIT link your one45 account to your Dal login.

OPTION 1: If you login with your Dal NetID and password

To log in with your Dal credentials, visit <https://one45.med.dal.ca> and enter your NetID only (eg. ab123456, NOT ab123456@dal.ca) and your Dal password. Click Login.

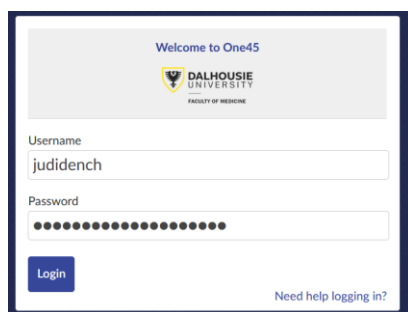


The screenshot shows the One45 login interface. At the top, it says "Welcome to One45" and features the Dalhousie University Faculty of Medicine logo. Below the logo, there are two input fields: "Username" with the text "ab123456" and "Password" with a masked field of dots. A blue "Login" button is positioned below the password field. In the bottom right corner, there is a link that says "Need help logging in?".

- If you have forgotten your Dal password, visit Dal's website to reset it. You cannot use the "Need Help Logging In?" link on one45's log in page. Reset it here: <https://myaccount.dal.ca/>

OPTION 2: If you login with a one45 username and password

To log in with your one45 credentials, navigate to <https://one45.med.dal.ca> and enter your one45 username and password.



The screenshot shows the One45 login interface. At the top, it says "Welcome to One45" and features the Dalhousie University Faculty of Medicine logo. Below the logo, there are two input fields: "Username" with the text "judidench" and "Password" with a masked field of dots. A blue "Login" button is positioned below the password field. In the bottom right corner, there is a link that says "Need help logging in?".

If you do not know or remember your one45 credentials, you can request your username and password reset from one45. Follow these directions:

1. Navigate to <https://one45.med.dal.ca> if you have not already.
2. Click *Need help logging in?*
3. Enter the email address associated with your one45 account (the email address you receive one45 alerts in).
4. Click *Send email reminder*.
5. One45 will send you a username and a password reset link.

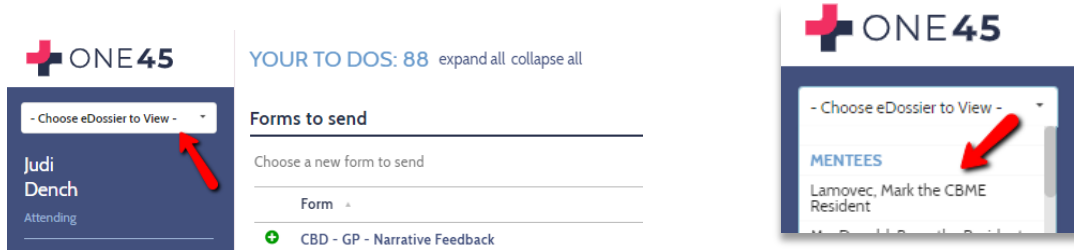
NOTE: It expires in ten minutes so be ready to log in when making the request.

REPORTS IN RESIDENT EDOSSIER

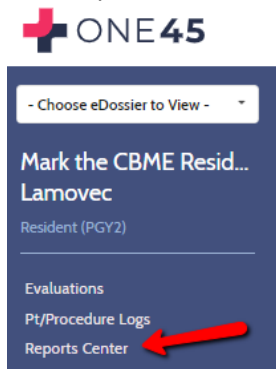
The following reports are generated from the resident’s account menu. Competence Committee members will have access to the resident’s account and those reports via the mentor role, a dropdown above your name in your eDossier. Residents have access to the same reports you see from their own account menu.

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

1. From your one45 account, click on the dropdown in your account (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 committee member 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 but pending, completed successfully, or expired before the preceptor could get to it?

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

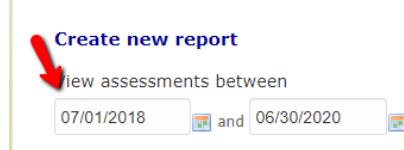
- Some EPAs ask for a “variety of hospital settings” or a “mix of conditions.” *Variety* and *mix* do not stipulate exact numbers so one45 would have no way to know if a requirement was met or not.
- Some EPAs have questions with open-ended text boxes for the answer. Again, one45 would have no idea if “Thoracic” entered as an answer and “Thoracic surgery” were the same procedure so cannot tabulate them.
- EPAs that have no overall assessment scales or don’t have five point scales won’t be pulled into the report. For example, some programs have Narrative Feedback forms that have no scale at all. Those EPAs will populate in this report but they will not be tallied or considered “above the threshold.” The *EPA Detail Report* and *Competency/EPA Summary Report* are useful for examining those forms.

Follow the steps below to access this report.

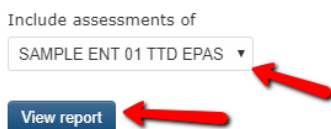
1. To begin, in your resident’s report center, click the *EPA Achievement Report*



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*.

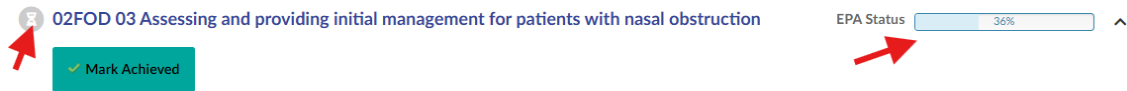


4. A report will generate for all the EPAs in that mapping list. This is an overview of what it looks like.

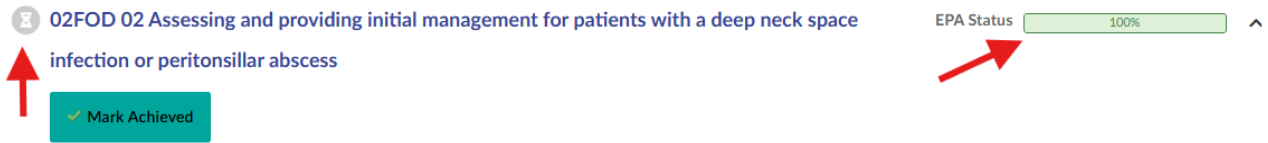
5. Let’s review some of your menu options. In the top right corner, you can go back to the main *Reports Center* menu, create a new EPA Achievement Report, or print this report to paper or pdf using these options at the top.

6. Each EPA will be listed along with the status of the EPA. The EPA status calculates the percentage of completion of that EPA. This percentage is based on how many points of achievement the EPA needs in order to be marked achieved and has so far been acquired, such as specific number of observations of achievement, required procedures or conditions that occurred during that observation, etc. The EPA statuses have different colors.
- Green: all points of achievement have been met, as far as one45 is concerned
 - Blue: EPA is in progress, and more points of achievement are required
 - Orange: something on the form cannot be tallied by one45 (an open-ended question, a narrative observation form lacking an overall achievement scale, etc.)

7. The hourglass symbol indicates if an EPA is still in progress and has not been marked as achieved by the competence committee.



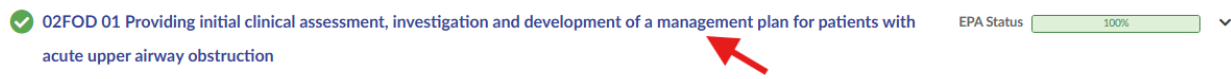
Even if one45 thinks the EPA is complete, the symbol will still be an hourglass until marked as achieved by the competence committee.



Once the competence committee marks it as achieved, it will then turn to a green check and designate who marked it as achieved and when. Note, it is not easily unmarked so if you accidentally mark it as achieved, let your PA know to contact MedIT. Only one45 can unmark the EPA as achieved at this time.



7. Click on one of the EPAs to see more information.



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. Most programs consider ratings of 4s (*I had to be there just in case*) and 5s (*I didn't have to be there*) to be observations of achievement. 1s through 3s would not be considered achieved nor would they tally.

The other criteria follow but are tallied only if they coincided with an observation of achievement. It lists how many of each requirement is needed, how many that they have obtained, *up to the minimum required*, and the percentage they have achieved so far. Note in the example, one EPA form might meet one of all three of the requirements for that EPA (could be successfully achieved, be an emergency consult, and be one of three unique assessors). In the example below, the resident may have actually submitted 2 successful emergency consults but one45 only displays the MINIMUM requirement of one.

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%

9. Below the requirements are basic details about ALL submissions of this EPA’s forms by preceptors. Details include whether a form was completed, expired, or is still pending; whether the completed forms met the threshold (usually 4 or 5), the assessment cue (if provided), the evaluator, and how many forms there are.

Encounter date	Sent date	Assessment cue	Evaluator	Count
Expired/deleted				4
2022/03/06	2022/03/15	-	Judi Dench the faculty	
2022/02/25	2022/02/25	The small child with a raisin in their nose	Judi Dench the faculty	
2021/06/30	2021/07/14	-	Sigourney Weaver	
2020/09/26	2020/09/28	-	Judi Dench the faculty	
Pending				0
-				
Completed below score threshold				1
2020/03/11	2020/04/01	-	Judi Dench the faculty	
Completed meeting score threshold				2
2021/06/30	2021/07/14	-	Judi Dench the faculty	
2020/10/15	2020/10/15	-	Judi Dench the faculty	

10. If we look at those closely, we can see only one form had an assessment cue and four forms expired.

Encounter date	Sent date	Assessment cue
Expired/deleted		
2022/03/06	2022/03/15	
2022/02/25	2022/02/25	The small child with a raisin in their nose
2021/06/30	2021/07/14	
2020/09/26	2020/09/28	-
Pending		
-		
Completed below score threshold		
2020/03/11	2020/04/01	-
Completed meeting score threshold		
2021/06/30	2021/07/14	-
2020/10/15	2020/10/15	-

11. We can see almost all of the EPAs were sent to Judi Dench with only one to Sigourney Weaver.

Evaluator	Count
	4
Judi Dench the faculty	
Judi Dench the faculty	
Sigourney Weaver	
Judi Dench the faculty	
	0
	1
Judi Dench the faculty	
	2
Judi Dench the faculty	
Judi Dench the faculty	

12. We can also see one form was not considered entrusted or successfully performed.

Completed below score threshold			1
2020/03/11	2020/04/01	-	Judi Dench the faculty
Completed meeting score threshold			2
2021/06/30	2021/07/14	-	Judi Dench the faculty
2020/10/15	2020/10/15	-	Judi Dench the faculty

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

14. NOTE: Some programs 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.

SF01TTD-*Transition to Discipline Report Card

EPA Status 33%

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

15. Note that Narrative Observation forms and Multi-source feedback forms, which usually lack an Observation of Achievement scale, will appear as “below the threshold” for they have no numerical value. Use *EPA Detail Report* and *Competency/EPA Summary Report* to review those.

02FOD 06 Narrative Observation EPA Status 0%

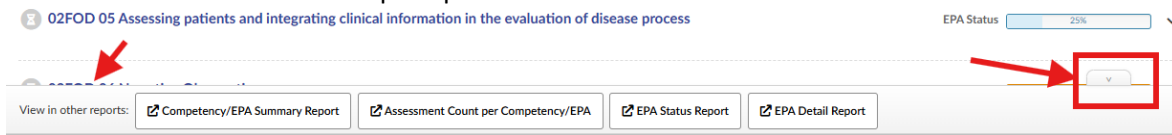
✔ Mark Achieved

Criteria	Counted toward required observations	Required	Progress
Collect 5 observations of achievement	0	5	0%
<div style="border: 1px solid #ccc; padding: 5px; font-size: small;"> ⓘ Heads up! We do not currently support observation of the achievement for this requirement. You may need to manually verify the result using the EPA Detail Report. </div>			

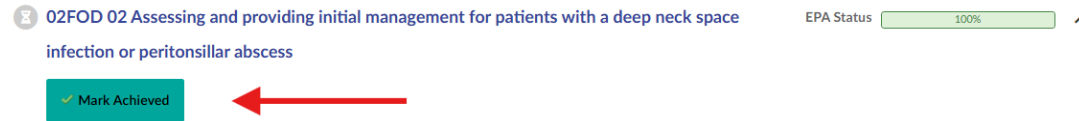
Encounter date	Sent date	Assessment cue	Evaluator	Count
Expired/deleted				
2022/03/08	2022/03/15	-	Patsy the tutor Palmer	2
2020/09/28	2020/09/28	-	Patsy the tutor Palmer	
Pending				0

Completed below score threshold			1
2020/09/24	2020/09/28	-	Judi Dench the faculty
Completed meeting score threshold			0

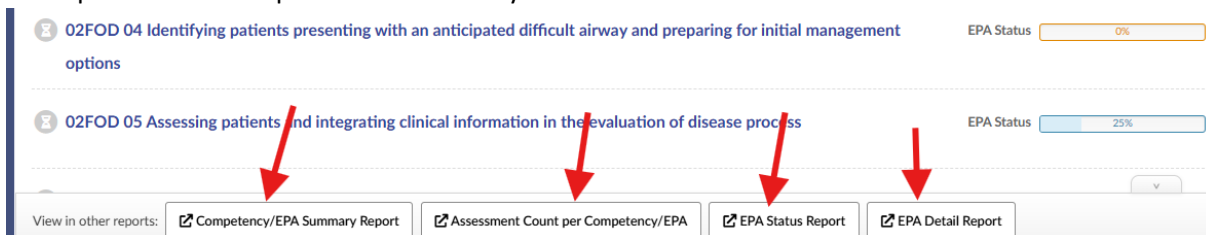
16. If you cannot see the final EPA on the list as the menu at the bottom covers it, you can collapse the menu to make room. Note that the collapse option is VERY faint.



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



18. 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 and other reports, 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.



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:

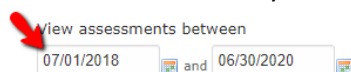
- examining progress on milestones
- reviewing assessment plan/contextual requirements, especially those that are not tallied automatically by the EPA Achievement Report
- summarizing Forms 3 and 4 that may or may not have an overall assessment question or are limited to narrative feedback only
- summarizing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

Note, if you launch it from the EPA Achievement Report, the report will maintain your settings (date range, EPA list) BUT it will only show you ONLY the successful EPAs by default. You would need to adjust the report settings to see anything different. The instructions below walk you through running the EPA Detail Report from scratch.

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



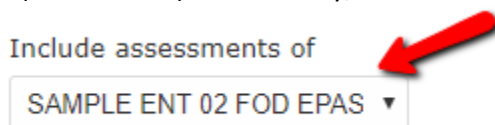
2. Specify the date range that covers the EPAs you wish to look at. Remember that if you are examining a second-year or later resident, they might have EPAs from stages spanning multiple years. You may need to set the start date to a year or more back.




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*.



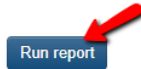
- Select all the EPAs you wish to see in the report.

EPA(s) 

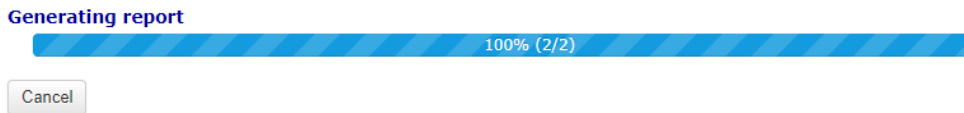
Select all / Select none

- 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
- 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


- Click Run Report.



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



- 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.



ONE45

Choose eDossier to View -

Mark the CBME Resident Lamovec
Resident (PGY2)

Evaluations
Pt/Procedure Logs
Reports Center

EPA DETAIL REPORT (MARK THE CBME RESIDENT LAMOVEC)

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

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

Reports Center Create new report

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

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

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

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

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

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

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

Case scenario
 3 Emergent
 0 Elective

Setting
 2 Clinical
 1 Simulation

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

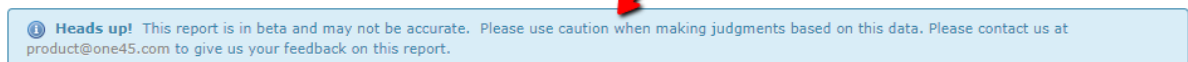
MILESTONES

	In Progress	Achieved
Recognize urgent issues that may need the involvement of more senior colleagues and engage them immediately	0	3
Identify and differentiate normal and abnormal findings in history and physical exam	1	2

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

EPA DETAIL REPORT

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



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



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

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

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

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

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

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

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

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

Case scenario
 3 Emergent
 0 Elective

Setting
 2 Clinical
 1 Simulation

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

MILESTONES

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

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

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

- B Windsor
- P Palmer
- P Palmer

Type of observation
 3 Direct Observation
 0 Indirect Observation

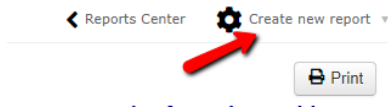
Consult Type
 3 Emergency
 0 Non-Emergency

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

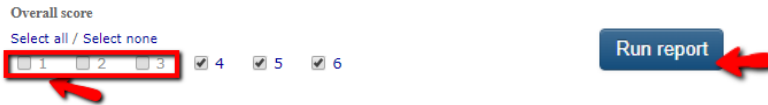
MILESTONES

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

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



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 supervisor

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

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

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

Type of observation
1 Direct Observation
0 Indirect Observation

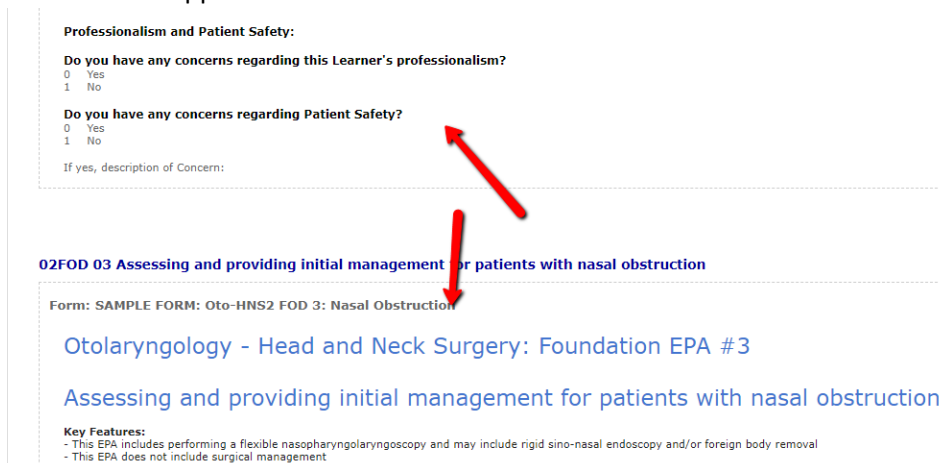
Consult Type
1 Emergency
0 Non-Emergency

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

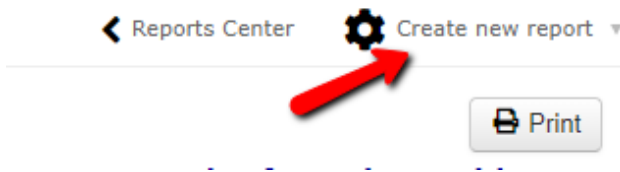
MILESTONES

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

16. Each EPA will appear one after the other.



17. To see the results from forms with **no overall assessment score** in EPA Detail Report, click *Create New Report*.



18. Ensure all numerical values are **unchecked**. This will ensure that ALL forms will be displayed. Click *Run Report*.

View assessments between
07/01/2018 and 06/01/2024

Overall score
Select all / Select none
 1 2 3 4 5 6

Include assessments of
SAMPLE ENT 02 FOD E

EPA(s)
Select all / Select none
 02FOD 00 Report Card
 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
 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
 02FOD 05 Assessing patients and integrating clinical information in the evaluation of disease process
 02FOD 06 Narrative Observation

Run Report

19. You will now see responses in the Narrative Observation form.

02FOD 06 Narrative Observation

Form: SAMPLE FORM: Oto-HNS2 FOD 6: Narrative Observation

Otolaryngology - Head and Neck Surgery: Foundations of Discipline EPA #6
Narrative Observation

Key Features:
- This EPA ensures the resident establishes the skills and knowledge of clinical medicine in order to effectively function, in later stages, as a pathology consultant for a wide variety of patients and conditions.
- This EPA includes performing clinical assessments, including history and physical exam, selecting and interpreting the results of investigations, and collaborating with clinical colleagues to develop a differential diagnosis and treatment or management plan.
- It also includes communicating with patients and their families to gather clinical information and convey information about the diagnosis and/or management plan.
- This EPA will be observed in the ambulatory or inpatient setting, with adult and pediatric patients, in a range of medical and surgical clinical conditions.

Assessment Plan:
Direct observation and/or case review by supervisor
Collect at least 5 observations

Feedback to Resident and Competency Committee:
- Mark was always on time but not often prepared for the day. Seemed stressed and out of sorts in the morning. Would calm and be more focused as the day progressed. Was very capable at differential diagnoses but his treatment plans lacked thorough processing. Must do review on treatment of disease rather than just identification.

Professionalism and Patient Safety:
Do you have any concerns regarding this Learner's professionalism?
0 Yes
1 No

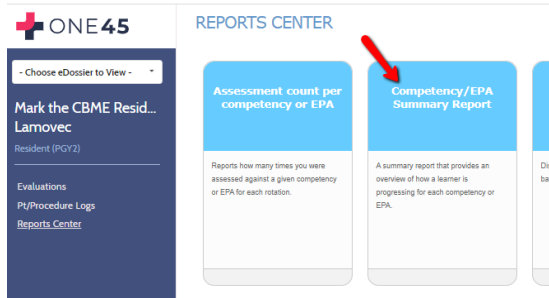
Do you have any concerns regarding Patient Safety?
0 Yes
1 No

If YES, description of concern:

20. This report can be used in conjunction with the EPA Achievement Report and Competency/EPA Summary 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

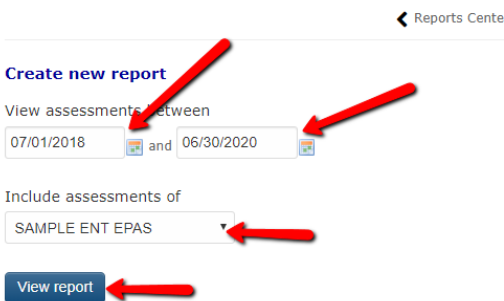
1. In the resident's Report Center, click *Competency/EPA Summary Report* in the menu that appears.



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.)

COMPETENCY/EPA SUMMARY REPORT (R)

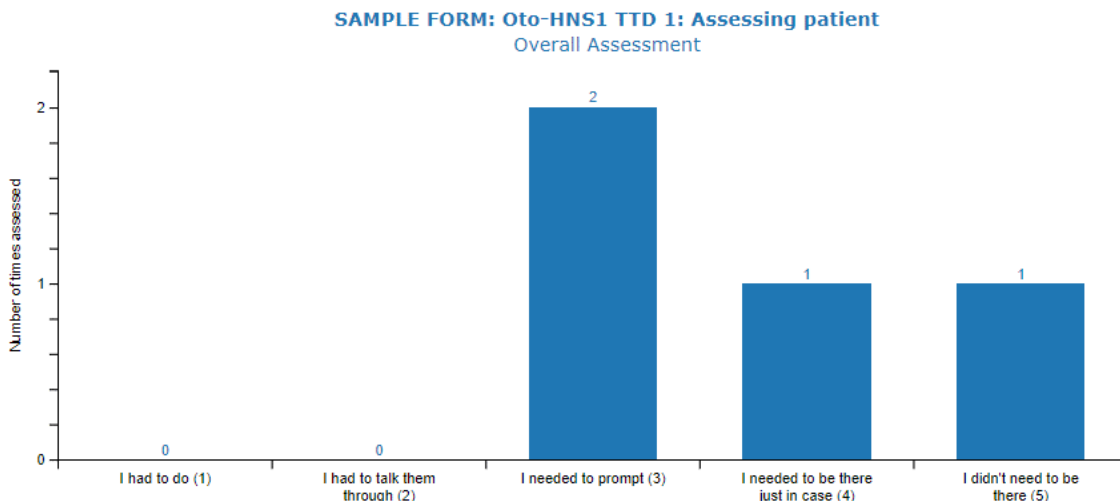
A summary report that provides an overview of how a learner is progressing



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

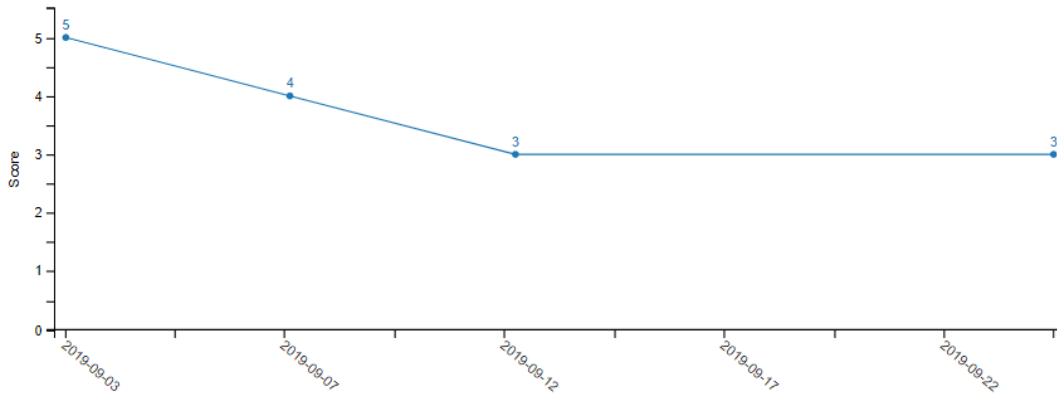
OTOL 01 - TTD1 Assessing patients with Otolaryngology-Head and Neck Surgery presentations

Assessment count



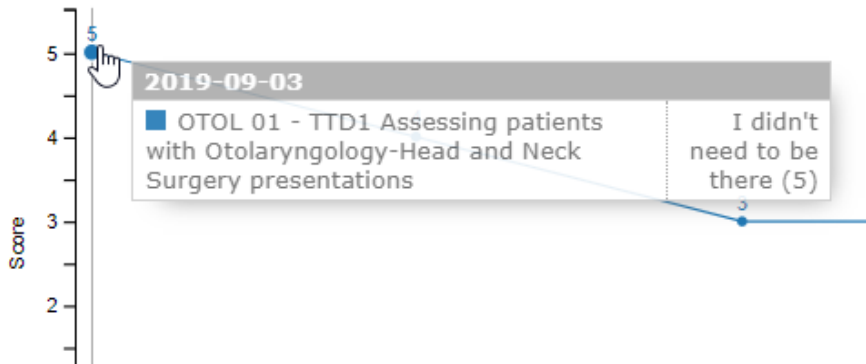
4. The next mini-report is the trajectory summary. It plots the dates that each assessment occurred. Note some might have multiple assessments on the same day.

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.

A screenshot of a 'Detail feedback' window. The window is titled 'Detail feedback' and has a close button (X) in the top right corner. It contains the following information:

- OTOL 01 - TTD1 Assessing patients with Otolaryngology-Head and Neck Surgery presentations** [View assessment](#)
- Evaluated by:** Palmer, Patsy the tutor on 2019-Sep-03
- Score:**
 - 5 - I didn't need to be there
- Narrative feedback:**
 - Did professional level work, faculty level skill.

The window is overlaid on a trajectory graph. A red arrow points to the first data point (2019-09-03, 5) on the graph.

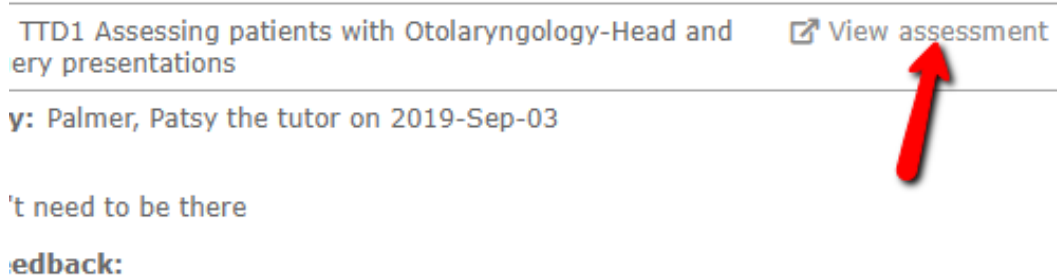
- Click *View assessment* to view that completed EPA form. It will open in a new window.

TTD1 Assessing patients with Otolaryngology-Head and Neck Surgery presentations [View assessment](#)

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

't need to be there

edback:



- 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

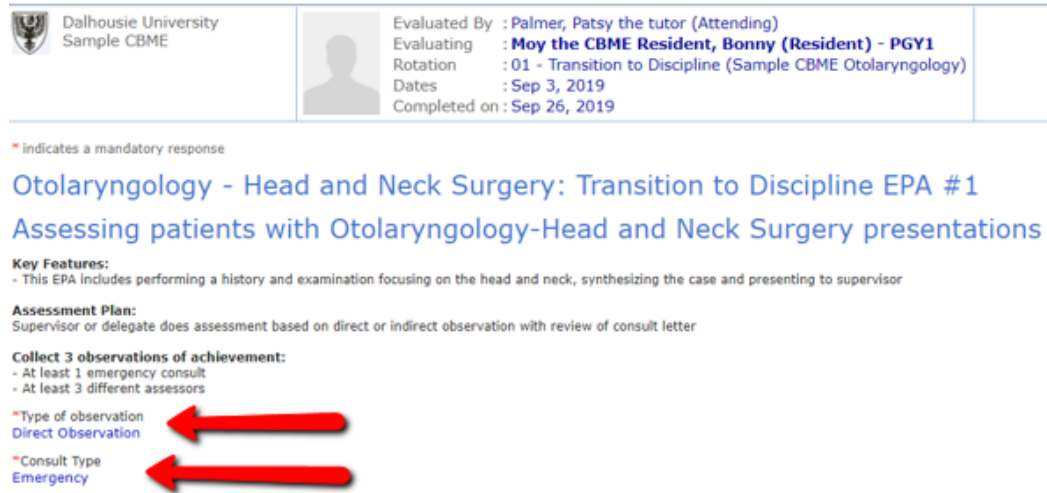
Key Features:
- This EPA includes performing a history and examination focusing on the head and neck, synthesizing the case and presenting to supervisor

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



- 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.

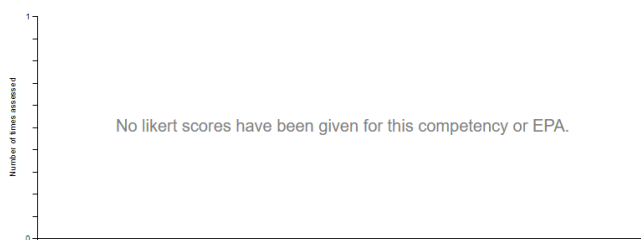
Narrative feedback

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.

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

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

Assessment count



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

ONE45

- Choose eDossier to View -

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

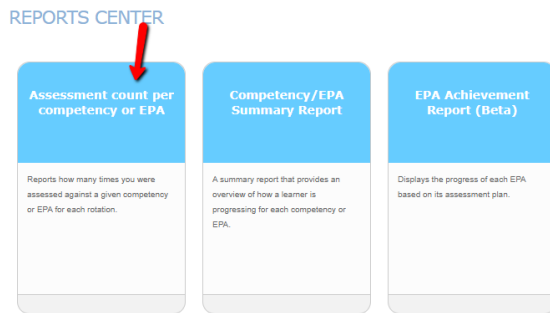
COMPETENCY/EPA SUMMARY REPORT (MARK THE CBME RESIDENT LAMOVEC)
A summary report that provides an overview of how a learner is progressing for each competency or EPA.

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

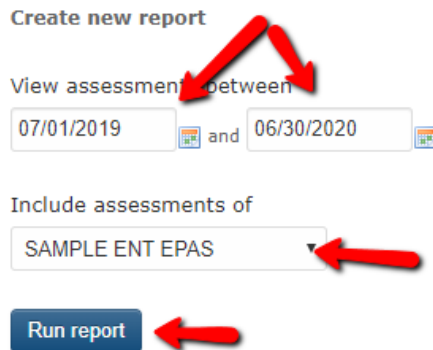
← Reports Center ⚙️ Create new report +

EPA Status Report

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



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



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

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

[Excel](#)

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.

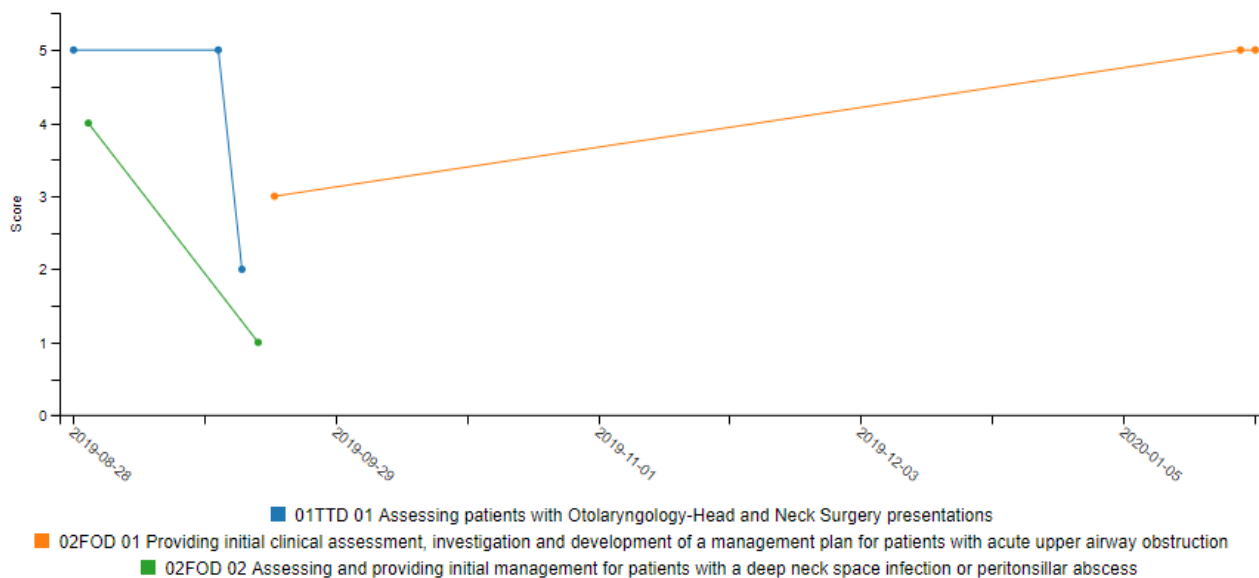
REPORTS CENTER

<p>Assessment count per competency or EPA</p> <p>Reports how many times you were assessed against a given competency or EPA for each rotation.</p>	<p>Competency/EPA Summary Report</p> <p>A summary report that provides an overview of how a learner is progressing for each competency or EPA.</p>	<p>EPA Achievement Report (Beta)</p> <p>Displays the progress of each EPA based on its assessment plan.</p>	<p>EPA Detail Report (Beta)</p> <p>A report that displays, for each EPA, a summary of all questions.</p>
<p>EPA Status Report</p> <p>[formerly EPA Achievement Report] Displays a count of how many EPAs are required, pending completion, completed, and how many EPAs meet the minimum score for achievement set by your program or institution.</p>	<p>Narrative Feedback</p> <p>Summary of narrative feedback by competency or EPA.</p>	<p>Spidergraph</p> <p>Radar plot of performance against EPAs or competencies.</p>	<p>Trajectory Summary Report</p> <p>Reports on performance relative to EPAs or competencies over time.</p>

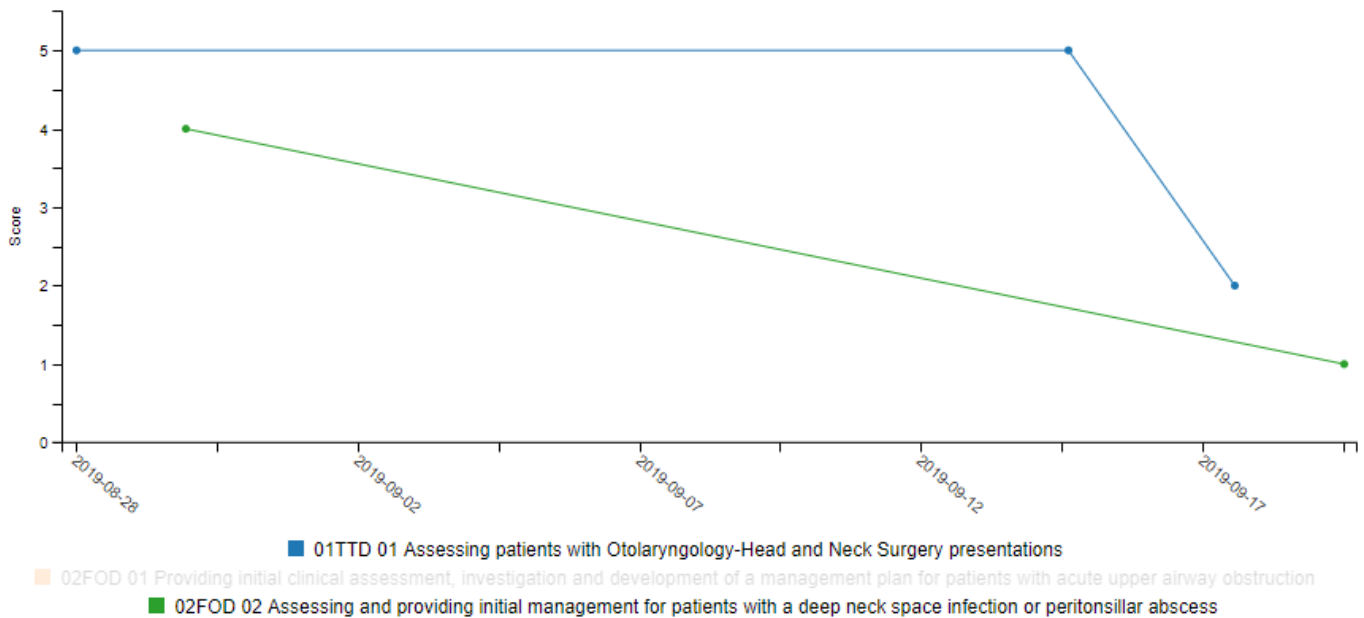
Trajectory Summary Report

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

◀ Reports Center ⚙ Create new report ▾



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

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

[Excel](#)

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](#)

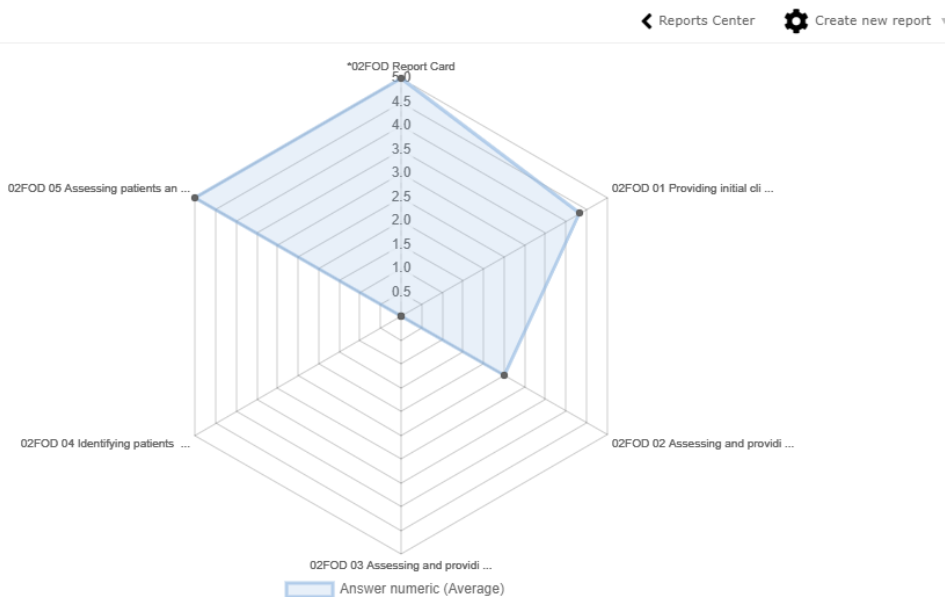
Competency or EPA name	01 - TTD (Sample OTOL)	02 - FOD (Sample OTOL)	ANES	CARD SURG	CONSULT	Total
01TTD 01 Assessing patients with Otolaryngology-Head and Neck Surgery presentations	3	0	0	0	0	3
02FOD 01 Providing initial clinical assessment, investigation and development of a management plan for patients 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)

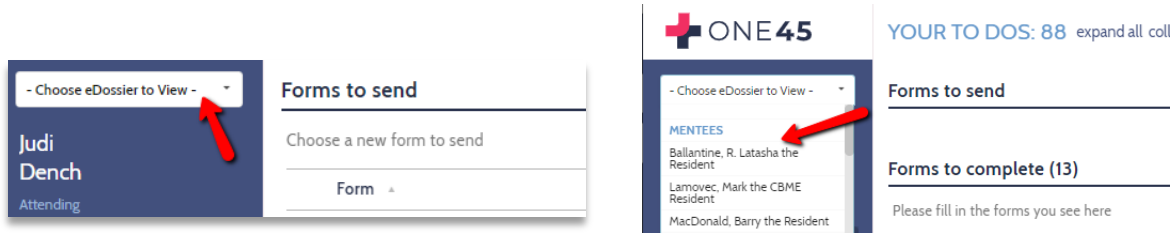
Radar plot of performance against EPAs or competencies.



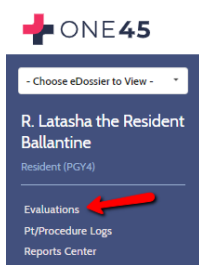
Reviewing Individual ITERS

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.

	from	to	evaluator (print)	done	confirmed viewed by me
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, Jan Leonard	Jul 03/19	Jul 03/19
Dermatology (Workshop - CBME)	Aug 22	Sep 18	2018 Dench, Judi, h Dench, Judi, admin Palmer, Patsy, the tutor, admin	Feb 15/19 Nov 19/18 Nov 19/18	
Emergency (Workshop - CBME)	Jul 25	Aug 21	Palmer, Patsy, the tutor	Nov 19/18	Nov 19/18
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.

	from	to	evaluator (print)	done	confirmed viewed by me
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, Jan Leonard	Jul 03/19	Jul 03/19
Dermatology (Workshop - CBME)	Aug 22	Sep 18	2018 Dench, Judi, h Dench, Judi, admin Palmer, Patsy, the tutor, admin	Feb 15/19 Nov 19/18 Nov 19/18	
Emergency (Workshop - CBME)	Jul 25	Aug 21	Palmer, 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

	from	to	evaluator (print)
01 - Transition to Discipline (Otolaryngology) (Workshop - CBME)	Oct 23	Oct 23	2019 Dench, Judi
Surgical Foundations - Transition to Discipline (Surgical Foundations)	Jun 18	Jun 18	2018 Epstein, Ian Leonard
Dermatology (Workshop - CBME)	Aug 22	Sep 18	2018 Dench, Judi, h Dench, Judi, admin Palmer, Patsy the tutor, admin
Emergency (Workshop - CBME)	Jul 25	Aug 21	2018 Palmer, Patsy the tutor
CVICU (Workshop - CBME)	Jul 01	Jul 24	2018 Windsor the Program Director, Barbara

Dalhousie University
Workshop - CBME

Evaluated By : [Dench, Judi \(Attending\)](#)
Evaluating : [Ballantine, R. Latasha the Resident \(Resident\) - PGY4](#)
Rotation : [01 - Transition to Discipline \(Otolaryngology\)](#)
Dates : [Oct 23, 2019](#)
Completed on : [Feb 28, 2019](#)

* indicates a mandatory response

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

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

Key Features:
- 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

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	2018	Dench, Judi
02 - Foundations of Discipline (Otolaryngology) (Workshop - CBME)	Sep 06	Sep 06		Windsor the Program Director, Barbara <i>P</i>
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.

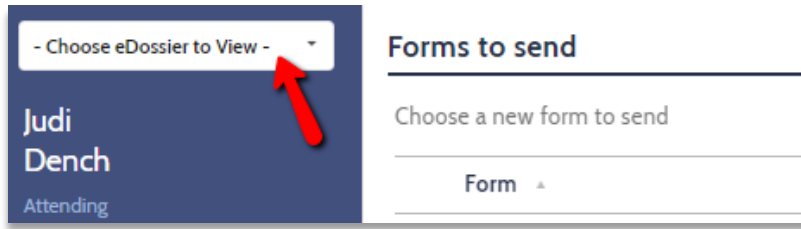
R. Latasha the Resident
Ballantine's Evaluations

	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	2018 Epstein, Ian Leonard	Jul 03/19
Dermatology (Workshop - CBME)	Aug 22	Sep 18	2018 Dench, Judi, h Dench, Judi, admin Palmer, Patsy the tutor, admin	Feb 15/19 Nov 19/18 Nov 19/18
Emergency (Workshop - CBME)	Jul 25	Aug 21	2018 Palmer, Patsy the tutor	Nov 19/18
CVICU (Workshop - CBME)	Jul 01	Jul 24	2018 Windsor the Program Director, Barbara	Nov 19/18

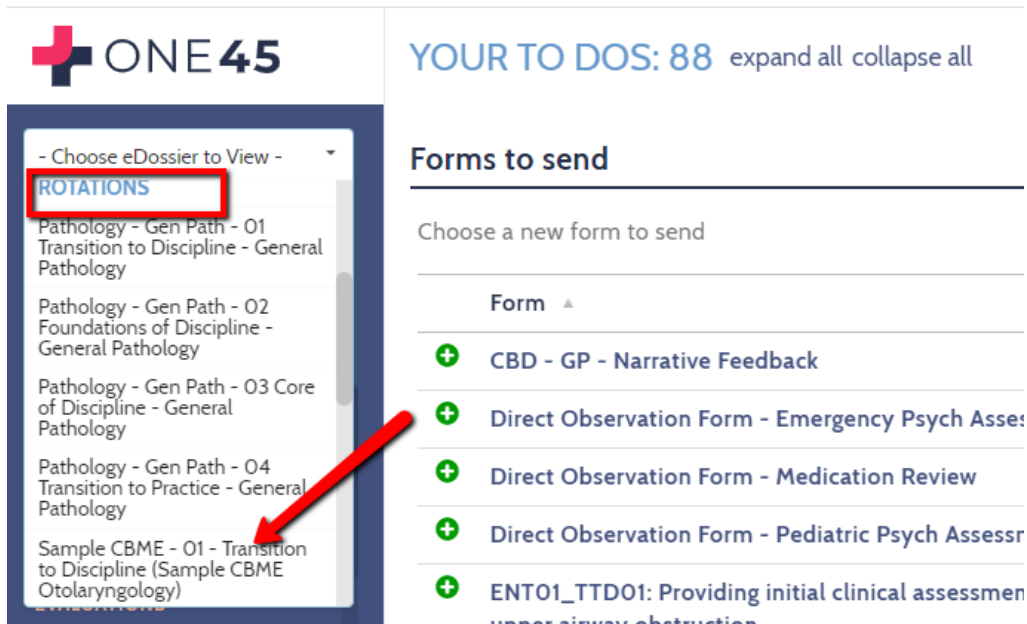
USING THE ROTATION HEAD TOOL

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.

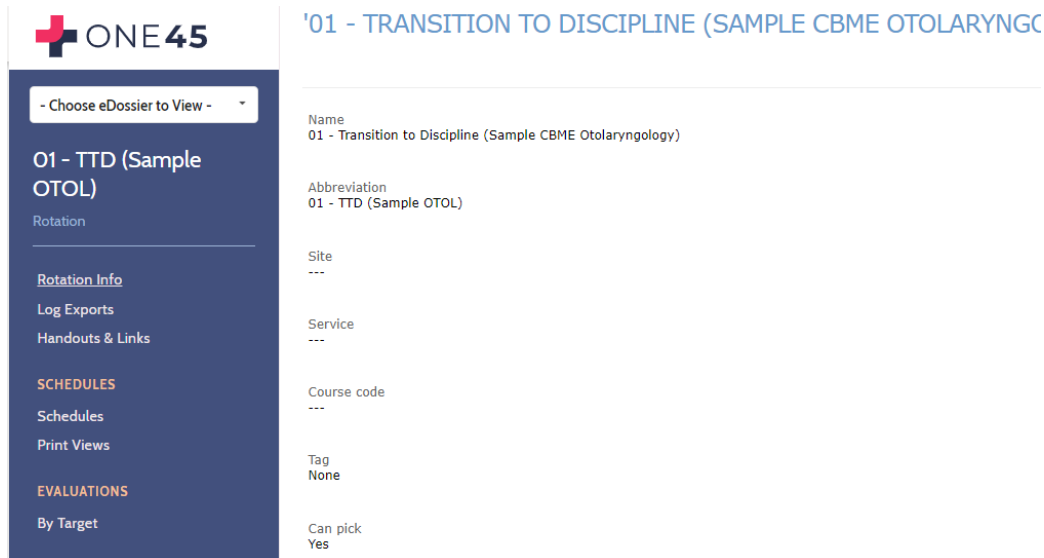
1. To begin, click the dropdown called Choose eDossier to View, located in the top right corner of your ToDos.



2. Pick the CBME rotation you wish to examine under the Rotations heading.



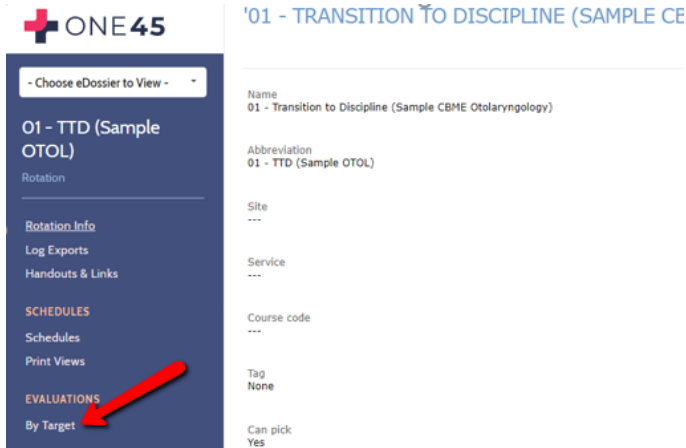
3. You will be taken to a Rotation eDossier. Continue on for instructions on how to access the reports from here.



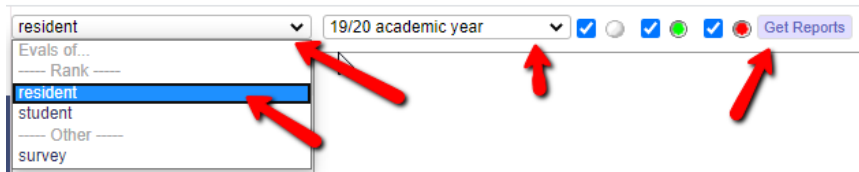
Evaluations by Target

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.

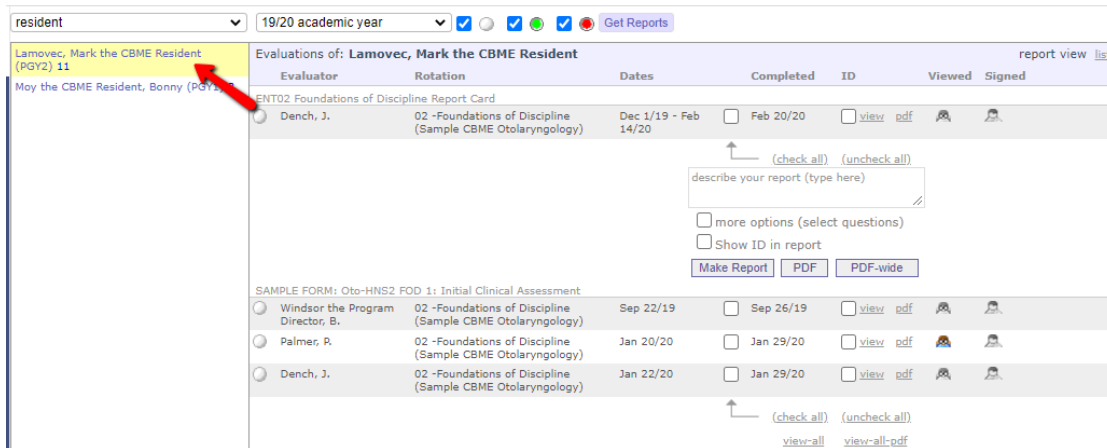
1. Click By Target under Evaluations in the side menu.



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.

SAMPLE FORM: Oto-HNS1 TTD 1: Assessing patient

<input type="radio"/>	Windsor the Program Director, B.	01 - Transition to Discipline (Sample CBME Otolaryngology)	Aug 28/19	<input checked="" type="checkbox"/>	Sep 26/19	<input type="checkbox"/> view pdf		
<input type="radio"/>	Palmer, P.	01 - Transition to Discipline (Sample CBME Otolaryngology)	Sep 15/19	<input checked="" type="checkbox"/>	Sep 26/19	<input type="checkbox"/> view pdf		
<input type="radio"/>	Dench, J.	01 - Transition to Discipline (Sample CBME Otolaryngology)	Sep 18/19	<input checked="" type="checkbox"/>	Sep 26/19	<input type="checkbox"/> view pdf		

(check all) (uncheck all)
 view-all view-all-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.

SAMPLE FORM: Oto-HNS1 TTD 1: Assessing patient

<input type="radio"/>	Windsor the Program Director, B.	01 - Transition to Discipline (Sample CBME Otolaryngology)	Aug 28/19	<input checked="" type="checkbox"/>	Sep 26/19	<input type="checkbox"/> view pdf		
<input type="radio"/>	Palmer, P.	01 - Transition to Discipline (Sample CBME Otolaryngology)	Sep 15/19	<input checked="" type="checkbox"/>	Sep 26/19	<input type="checkbox"/> view pdf		
<input type="radio"/>	Dench, J.	01 - Transition to Discipline (Sample CBME Otolaryngology)	Sep 18/19	<input checked="" type="checkbox"/>	Sep 26/19	<input type="checkbox"/> view pdf		

(check all) (uncheck all)
 view-all view-all-pdf

more options (select questions)
 Show ID in report

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

Consult Type

- 3 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	1	0	1	2	4	4.0

MILESTONES

	Not observed	In Progress	Achieved	N	Mean
Elicit a basic head and neck history	0	1	3	4	1.8
Synthesize patient information including symptoms, differential diagnosis, and treatment plan clearly and concisely	0	1	3	4	1.8
Perform a head and neck physical exam	0	1	3	4	1.8
• 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	0	1	3	4	1.8
Organize information in appropriate sections within an electronic or written medical	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.

SAMPLE FORM: Oto-HNS1 TTD 1: Assessing patient

Assessor	Observation	Date	Status	Report Date	Actions
Windsor the Program Director, B.	01 - Transition to Discipline (Sample CBME Otolaryngology)	Aug 28/19	Green	Sep 26/19	view, pdf, [icon]
Palmer, P.	01 - Transition to Discipline (Sample CBME Otolaryngology)	Sep 15/19	Green	Sep 26/19	view, pdf, [icon]
Dench, J.	01 - Transition to Discipline (Sample CBME Otolaryngology)	Sep 18/19	Red	Sep 26/19	view, pdf, [icon]

(check all) (unchecked all)
view-all view-all-pdf

Transition to Discipline Report ACHIEVED

more options (select questions)
Show ID in report

Make Report PDF PDF-wide

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

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

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

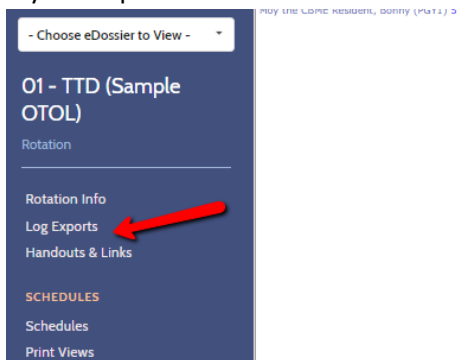
	Not observed	In Progress	Achieved	N	Mean
Elicit a basic head and neck history	0	0	2	2	2.0
Synthesize patient information including symptoms, differential diagnosis, and treatment plan clearly and concisely	0	0	2	2	2.0
Perform a head and neck physical exam	0	0	2	2	2.0
- Use of microscope for otoscopy	0	0	2	2	2.0
- 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.

LOG EXPORTER: CONFIGURE EXPORT

Log:

- GIM PROCEDURE LOG
- Sample Field Note (learner)

Competency list:

PROCEDURES LOG

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

Competency items to include:

- 24 hour ABPM interpretation
- Arterial line insertion
- Bone marrow aspiration and biopsy
- Central line insertion
- Invasive ventilation management

(check all) (uncheck all)

Questions to include:

- Date
- Preceptor
- Identify the Procedure
- Was this procedure:
- My strengths are...

(check all) (uncheck all)

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

Performed/Experienced between:

Jul 1 2019 to Apr 1 2020

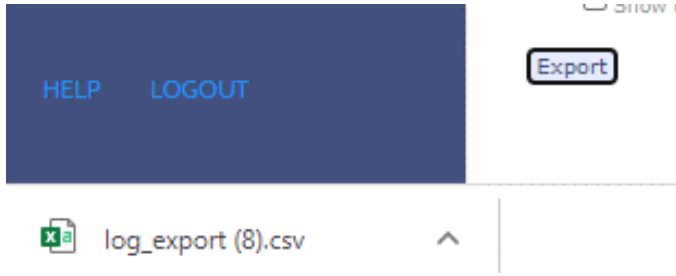
Include people types

Include feedback

Show results from this log across all groups (will not show the "Rotation Name" column)

Export

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



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

	A	B	C	D	E	F	G	H	I	J	K	L	M
1													
2	From 2019-07-01 to 2020-04-01												
3	Report produced on 2020-04-01												
4	Name	Rotation	Date Este	Levels/gr	Date	Preceptor	Identify the Procedure	Was this procedure:	My strengths are...	My areas of improvement are...	I agree with the student's observations	Clerk Strengths	Clerk Area of Improvement
5	Barry Macdonald	01 TTD	02-20-2021	PGY3	02-20-2021	Judi Deno	Arterial line insertion	Prompted	I communicated well with the patient	I need more practice in simulation as I made the patient uncomfortable	Yes	They are correct that they communicated well.	They definitely need simulation experience as that should have gone smoothly
6													
7													

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.



The screenshot displays the ONE45 interface. On the left, a dark blue sidebar contains the ONE45 logo at the top, followed by a dropdown menu labeled '- Choose eDossier to View -'. Below this, the text '01 - TTD (Sample OTOL)' is shown, with 'Rotation' underneath. A horizontal line separates this from a list of options: 'Rotation Info', 'Log Exports', and 'Handouts & Links'. A red arrow points to 'Handouts & Links'. The main content area on the right is titled 'HANDOUTS & LINKS' and contains a single document entry: 'Competence Committee Guide (2195Kb; docx)'. A red arrow points to this document entry.