



FACULTY AND CBME

Triggering, Completing, and Reviewing Forms in
one45 and on a mobile device

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Faculty and CBME: Overview

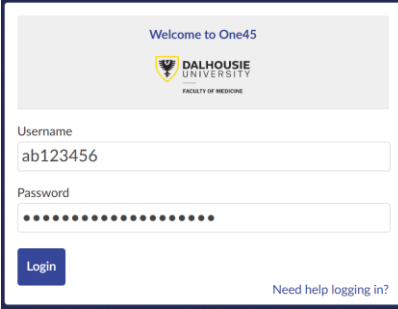
Logging into one45

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.

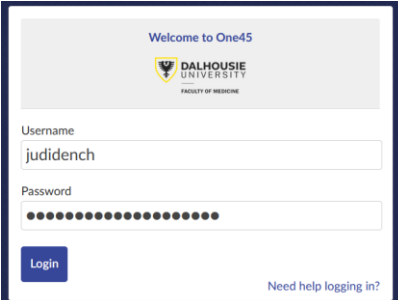


The screenshot shows the 'Welcome to One45' login page for Dalhousie University Faculty of Medicine. It features a 'Username' field containing 'ab123456' and a 'Password' field with masked characters. A blue 'Login' button is positioned below the fields, and a link for 'Need help logging in?' is located at the bottom right of the form area.

- 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 'Welcome to One45' login page for Dalhousie University Faculty of Medicine. It features a 'Username' field containing 'judidench' and a 'Password' field with masked characters. A blue 'Login' button is positioned below the fields, and a link for 'Need help logging in?' is located at the bottom right of the form area.

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

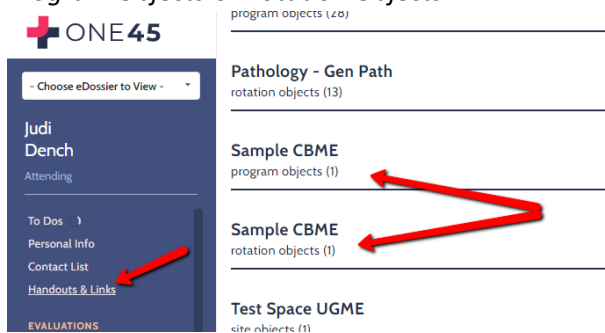
1. Navigate to <https://one45.med.dal.ca> if you have not already.
2. Click *Need help logging in?*
3. Enter the email address associated with your one45 account (the email address you receive one45 alerts in).
4. Click *Send email reminder*.
5. One45 will send you a username and a password reset link.

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

Knowing the EPAs and their requirements (Desktop and Mobile)

Note there is no way for you to preview blank EPA forms in one45 prior to triggering them on residents. Some program administrators have uploaded a pdf of each stage's EPAs, either as program object or a rotation objects. If this is the case in your program, you can find them in your *Handouts and Links* section. Follow the directions below to access that tool.

1. Log in to one45 (see section above on how to do this).
2. Click on *Handouts and Links* in the main menu (mobile users, click the *Menu* button first). Click on either *Program Objects* or *Rotation Objects*.



3. If available to you, the EPAs may be in one or more documents found in those sections .

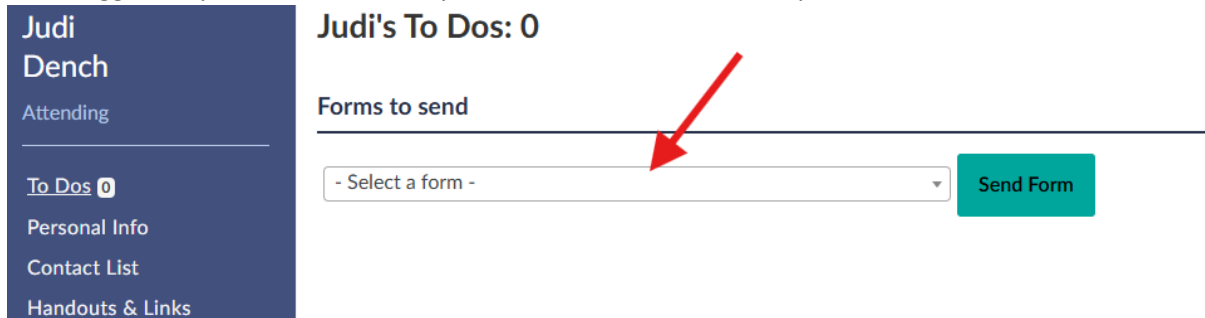


Triggering EPA forms

Please find instructions below on how you as a faculty member can trigger forms to evaluate residents on their performance on a particular EPA. These instructions include both desktop and mobile browser steps.

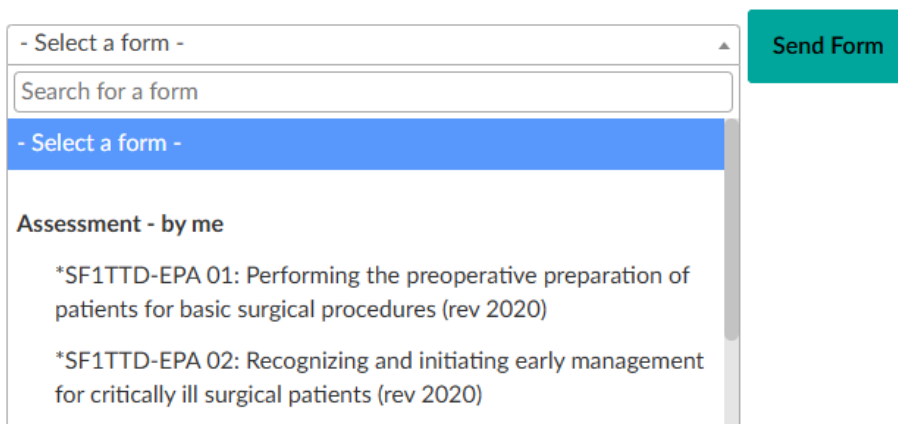
Triggering EPA forms for residents you wish to assess (Desktop version)

6. Log into one45 (see the Logging In to One45 section at the start of the manual.)
7. Once logged in, you will be taken to your ToDos. You will see a drop down menu under *Forms to Send*. Click it.

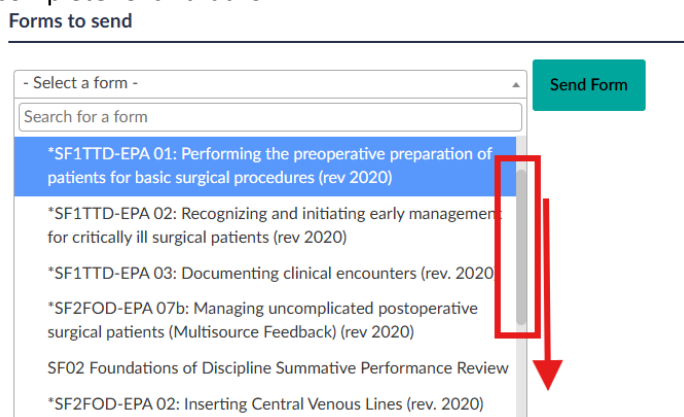


8. A menu and a search box will appear.

Forms to send



9. You can do one of two things to find your form:
 - a. OPTION 1: You can scroll down using the scroll bar on the right until you find the form you want to complete. Click that form.



- b. OPTION 2: You can search for the form by typing in a keyword and then clicking the form you want to select.

Forms to send

- Select a form -
Send Form

preoperative

Assessment - by me

*SF1TTD-EPA 01: Performing the preoperative preparation of patients for basic surgical procedures (rev 2020)

*SF2FOD-EPA 04: Providing risk assessment and management for preoperative patients in preparation for surgery (rev. 2020)

- c. Once you have selected your form, click *Send Form* to send the form to yourself to complete.

My To Dos: 0

Forms to send

*SF1TTD-EPA 01: Performing the preoperative preparation of pa...
Send Form

10. A window will open asking you for information. If you have the option, pick which rotation you observed or participated in the EPA you are now assessing the resident on. However, many departments run their EPA forms either off of a single rotation called CMBE or off rotations based on CBME stage (like TTD, FOD, etc). If this is the case, a default will be automatically selected, as seen below. Click *Continue to step 2*.

Form to send
SF1TTD-EPA 01: Performing the preoperative preparation of patients for basic surgical procedures

Step 1 - Select an event
Surgical Foundations - Transition to Discipline (Surgical Foundations)

Surgical Foundations - Transition to Discipline (Surgical Foundations)

Continue to step 2 →

Step 2 - Select a date

11. Specify the date the EPA was assessed.

Form to send
SF1TTD-EPA 01: Performing the preoperative preparation of patients for basic surgical procedures

Step 1 - Select an event
Surgical Foundations - Transition to Discipline (Surgical Foundations)

Step 2 - Select a date
Jun 04, 2019

Jun 04, 2019

Jun
2019

Su	Mo	Tu	We	Th	Fr	Sa
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29

12. You can also enter an assessment cue that will remind the resident about the context of the interaction.
Example: *Patient with bone cancer*. Remember to be mindful of your department's patient privacy policies. Click

Continue to step 3 when done.

Step 2 - Select a date and add an assessment cue
Nov 30, 2020

SWITCH TO DATE RANGE

Assessment cue (optional)
Patient with bone cancer

BACK TO STEP 1 CONTINUE TO STEP 3 →

13. Search for the resident you are looking for, check their name, and click *Send form*.

Step 3 - Choose who you will be assessing
Parton, Dolly the Resident (resident) show selections

Pick from suggestions or dolly Last name Search

From search:

Select: all none

Parton, Dolly the Resident (resident)

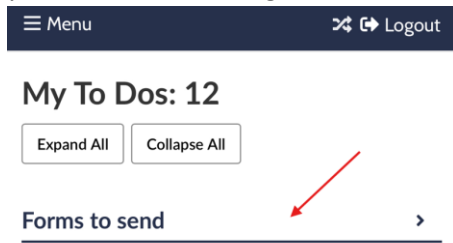
Back to step 2 Send form

14. If you only picked one resident, it should open automatically. Otherwise, you can access it in your *Forms to Complete* section of your ToDos, ready to complete. Click on it, fill out all the mandatory questions, and submit it as you would other forms. If you need help with this process, see the *Completing EPA Forms* section of this manual below.

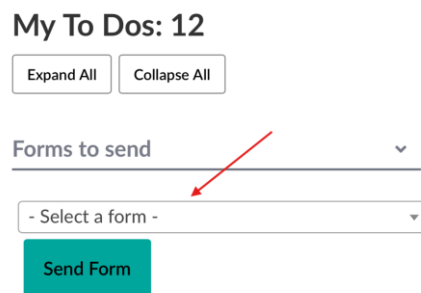
Forms to complete (13)						
(PGY1)	(Otolaryngology)				Initial Clinical Assessment	
Moy the CBME Resident, Bonny (PGY1)	01 - Transition to Discipline (Sample CBME Otolaryngology)	Sample CBME	Aug 5/19	SAMPLE FORM: Oto-HNS! TTD 1: Assessing patient	---	
MacDonald, Barry the Resident (PGY1)	Med 1 (2023) :: 07 Electives or Family Medicine Experience	Undergrad	Aug 1/19 - 30/19	Assessment of Student by Preceptor - Rotating Elective Project	Dalhousie UGME	
Parton, Dolly the Resident (PGY2) (due: Jul 10, 11:59pm)	04 - Transition to Practice (Otolaryngology)	Workshop - CBME	Jul 31/19	ENTO_TTD01: Providing initial clinical assessment, investigation and development	---	

Triggering EPA forms for residents you wish to assess (Mobile version)

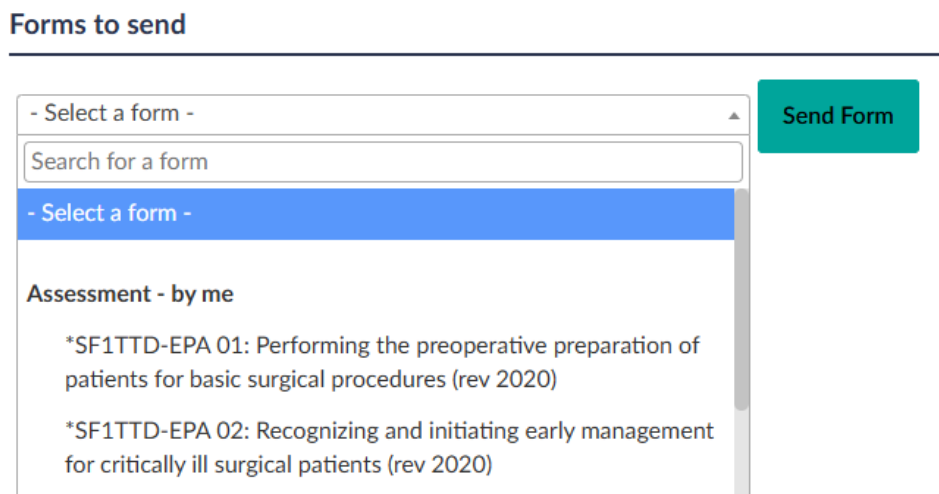
1. Log into one45 (see the Logging In to One45 section at the start of the manual.)
2. You will be taken to your ToDos. Note that logout is to the right, a menu with other options is to the left, and you have several categories of ToDos to pick from. Click *Forms to Send*.



3. A dropdown box will appear. Click the dropdown.



4. A menu and a search box will appear.



5. You can do one of two things to find your form:
 - a. OPTION 1: You can scroll down using the scroll bar on the right until you find the form you want to complete. Click that form.

Forms to send

- Select a form - Send Form

Search for a form

- *SF1TTD-EPA 01: Performing the preoperative preparation of patients for basic surgical procedures (rev 2020)
- *SF1TTD-EPA 02: Recognizing and initiating early management for critically ill surgical patients (rev 2020)
- *SF1TTD-EPA 03: Documenting clinical encounters (rev. 2020)
- *SF2FOD-EPA 07b: Managing uncomplicated postoperative surgical patients (Multisource Feedback) (rev 2020)
- SF02 Foundations of Discipline Summative Performance Review
- *SF2FOD-EPA 02: Inserting Central Venous Lines (rev. 2020)

- b. OPTION 2: You can search for the form by typing in a keyword and then clicking the form you want to select.

Forms to send

- Select a form - Send Form

preoperative

Assessment - by me

- *SF1TTD-EPA 01: Performing the preoperative preparation of patients for basic surgical procedures (rev 2020)
- *SF2FOD-EPA 04: Providing risk assessment and management for preoperative patients in preparation for surgery (rev. 2020)

- c. Once you have selected your form, click *Send Form* to send the form to yourself to complete.

My To Dos: 0

Forms to send

*SF1TTD-EPA 01: Performing the preoperative preparation of pa... Send Form

6. A window will open asking you for information. If you have the option, pick which rotation you observed or participated in the EPA you are now assessing the resident on. However, many departments run their EPA forms either off of a single rotation called CMBE or off rotations based on CBME stage (like TTD, FOD, etc). If this is the case, a default will be automatically selected, as seen below. Click *Continue to step 2*.

Form to send X

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

Step 1 - Select an event

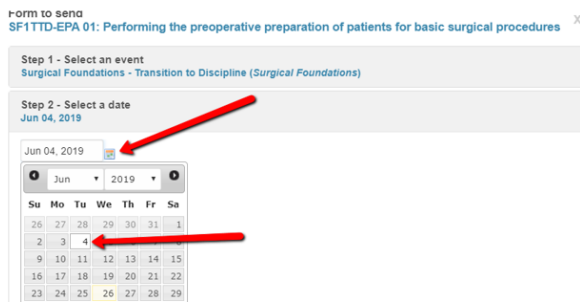
02 -Foundations of Discipline (Sample CBME Otolaryngology) (Sample CBME)

- 02 -Foundations of Discipline (Sample CBME Otolaryngology) (Sample CBME)

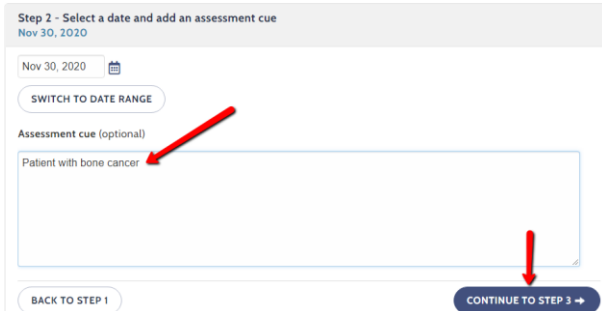
Continue to step 2 →

Step 2 - Select a date

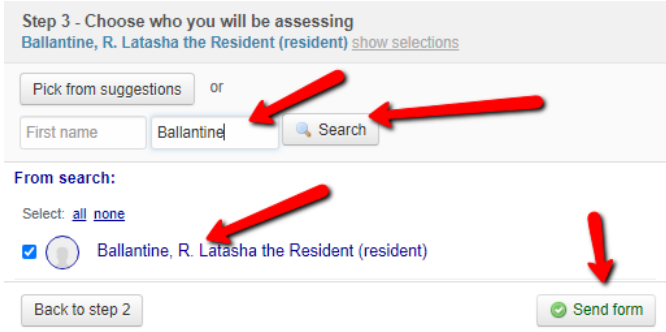
7. Specify the date the EPA was assessed.



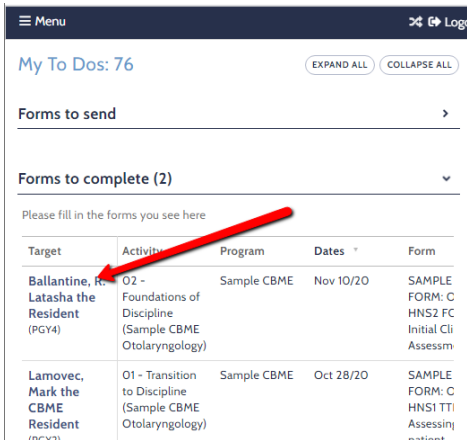
8. You can also enter an assessment cue that will remind the resident about the context of the interaction. Example: *Patient with bone cancer*. Remember to be mindful of your department’s patient privacy policies. Click *Continue to step 3* when done.



9. You may see the resident’s name listed at the bottom of the search window. Click on their name or, if they are not listed, search and select the resident you are looking for. Click Send Form.



10. If you only picked one resident, it should open automatically, ready for you to complete. Otherwise, you can access it in your *Forms to Complete* section of your Todos. Click on it, fill out all the mandatory questions, and submit it as you would other forms. If you need help with this process, see the *Completing EPA Forms* section of this manual below.

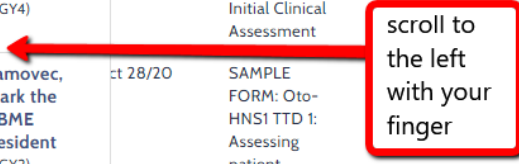


- a. NOTE: You might not be sure which form to open as some mobile devices cannot display all of the details of the form in smaller screens. Use your finger to scroll over to see the other details such as the name of the form that might be hidden.

Forms to complete (2) ▼

Please fill in the forms you see here

Target	ates ▼	Form	Contact
Ballantine, R. Latasha the Resident (PGY4)	ov 10/20	SAMPLE FORM: Oto-HNS2 FOD 1: Initial Clinical Assessment	---
Lamovec, Mark the CBME Resident (PGY2)	ct 28/20	SAMPLE FORM: Oto-HNS1 TTD 1: Assessing patient	



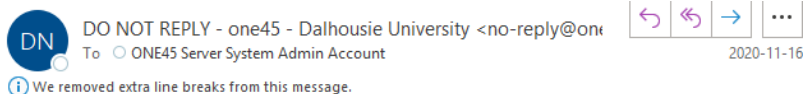
Completing EPA Forms

Completing EPA forms sent to you by residents (Desktop version)

1. You may receive an email from one45.com alerting you to a new ToDo to complete. If you do, click the link within the email and you will automatically be logged into your account. Otherwise, proceed to step 2.

NOTE:

- a. The log in links only work once. If you click on the link, but aren't ready to complete your form, it will not work for you later. You will need to log in manually (see step 2).
- b. If you were sent multiple forms in the same day, one45 will only send you one email so as not to bother you with multiple emails. Please periodically log in manually to check you don't have outstanding forms.



CAUTION: The Sender of this email is not from within Dalhousie.

Dalhousie University

You have a task to complete in the One45 system (e.g. survey, evaluation, objectives, log, form distribution).

You have received this email from the One45 system, because you either never logged into One45 and need to set up a password or because you have requested to reset it.

Your username is: ppalmer

Please click on the following link to reset your password:

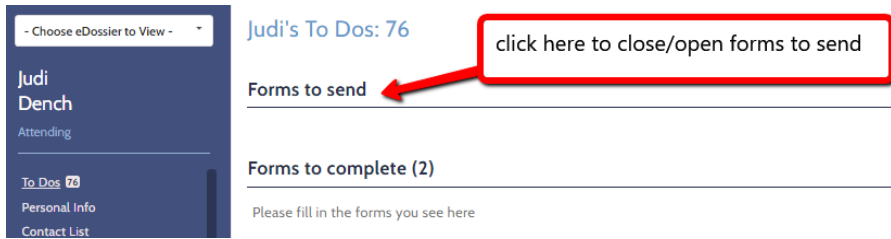
<https://one45.med.dal.ca/web/one45.php/auth/auto/redirect/0a798d9d85c7f69193a942c2c6690cd318>



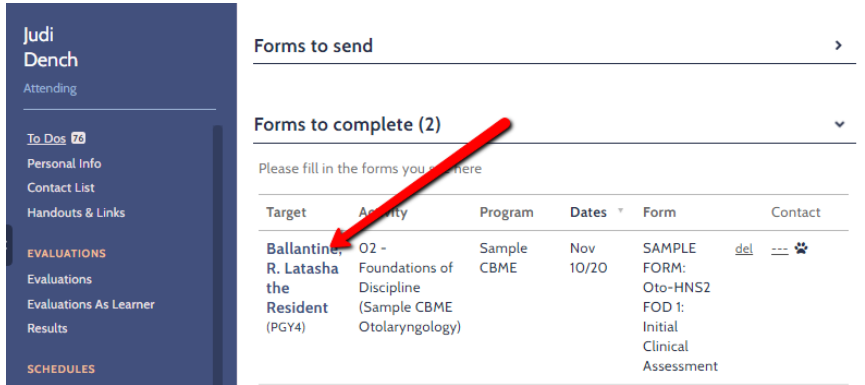
2. If you need to manually log in, see the Logging In to One45 section at the start of the manual.
3. Once logged in, you will be taken to your ToDos by default.

Form	Assessment
**EM SAMPLE Foundations of Discipline Report Card	by me
CBD - GP - Narrative Feedback	by me
Direct Observation Form - Emergency Psych Assessment	by me
Direct Observation Form - Medication Review	by me
Direct Observation Form - Pediatric Psych Assessment	by me
ENT01_TTD01: Providing initial clinical assessment, investigation and development of a management plan with acute upper airway obstruction	by me
Eval of Resident by Faculty	by me
evaluation of faculty by student	by me
GERI-S2 FOD 2A: Assessing and providing initial management for patients with a deep neck space infection or peritonsillar abscess	by me
ITER - General Alien Medicine (c. 2017)	by me
KF SAMPLE FORM (c. May 2020 3:41pm)	by me

4. You will want to access your *Forms To Complete* section. If you don't see it right away, you can scroll down OR close the *Forms to Send* section by clicking on the *Forms to Send* title.



- If you have been sent any EPA forms, you will see them in the *Forms to Complete* section. Click on the resident's name to open the EPA form.



- The form will open in a new window. Fill out your form.

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

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

Key Features:

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

Assessment Plan:

Part A: Patient Assessment

Supervisor does assessment based on direct or indirect observation

Collect 1 observation of achievement:

- At least one emergent case

*Case scenario

- Any required fields will be marked with a red asterisk.

*Case scenario

*Setting

	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	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

MILESTONES

- When you are ready to submit the form, click *Submit*.

If you need to revisit the form later, save your changes by clicking *Save and Close*. It will be in your *Forms to*

Complete section until you are ready to finish it or until the form expires.

Yes

No



SUBMIT

Commit responses and remove form from your inbox.

SAVE AND CLOSE

Save current responses and keep form available in your inbox for revision.

CANCEL

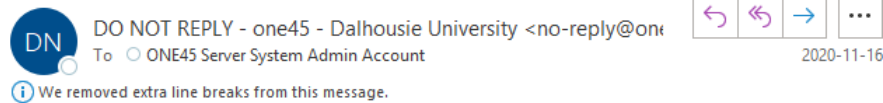
Discard any changes to responses and keep form available in inbox for completion.

Completing EPA forms sent to you by residents (Mobile version)

1. You may receive an email from one45.com alerting you to a new ToDo to complete. If you do, click the link within the email and you will automatically be logged into your account. Otherwise, proceed to step 2.

NOTE:

- a. The log in links only work once. If you click on it, but aren't ready to complete your form, it will not work for you later. You will need to log in manually (see step 2).
- b. If you were sent multiple forms in the same day, one45 will only send your one email so as not to bother you with emails. Please periodically log in manually to check you don't have outstanding forms.



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Dalhousie University

You have a task to complete in the One45 system (e.g. survey, evaluation, objectives, log, form distribution).

You have received this email from the One45 system, because you either never logged into One45 and need to set up a password or because you have requested to reset it.

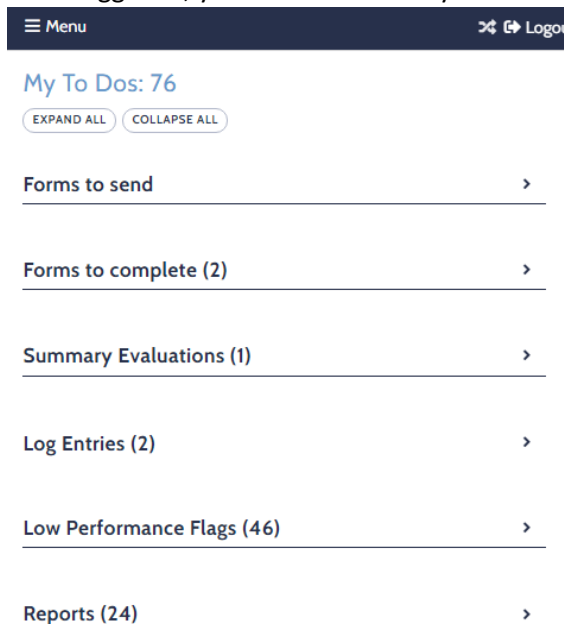
Your username is: ppalmer

Please click on the following link to reset your password:


<https://one45.med.dal.ca/web/one45.php/auth/auto/redirect/0a798d9d85c7f69193a942c2c6690cd318>




2. If you need to manually log in, see the Logging In to One45 section at the start of the manual.
3. Once logged in, you will be taken to your ToDos by default.




4. Click the *Forms To Complete* section.

Forms to complete (2) 


Please fill in the forms you see here

Target	Activity	Program	Dates 
Ballantine, R. Latasha the Resident (PGY4)	O2 - Foundations of Discipline (Sample CBME Otolaryngology)	Sample CBME	Nov 10/20
Lamovec, Mark the CBME Resident (PGY2)	O1 - Transition to Discipline (Sample CBME Otolaryngology)	Sample CBME	Oct 28/20

5. If you have been sent any EPA forms, you will see them listed with the residents' names. Click on a resident's name to open the EPA form.

Forms to complete (2) 


Please fill in the forms you see here


Target	Activity	Program	Dates 
Ballantine, R. Latasha the Resident (PGY4)	O2 - Foundations of Discipline (Sample CBME Otolaryngology)	Sample CBME	Nov 10/20
Lamovec, Mark the	O1 - Transition to Discipline	Sample CBME	Oct 28/20

6. The form will open, oftentimes in the same window. Fill out your form.

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
 

*Setting
 

*Overall Assessment
 I had to do
 I had to talk them through
 I needed to prompt

7. The resident may have included an assessment cue at the top of the page to remind you of the context of the EPA you are being asked to assess.

* indicates a mandatory response

Assessment cue:
Patient with bone cancer that you said I communicated with well

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

8. Any required fields will be marked with a red asterisk.

MILESTONES

*Recognize urgent issues that may need the involvement of more senior colleagues and engage them immediately

Not observed

In Progress

Achieved

9. When you are ready to submit the form, click *Submit*.

If you need to revisit the form later, save your changes by clicking *Save and Close*. It will be in your *Forms to Complete* section until you are ready to finish it or the form expires.

SUBMIT **SAVE AND CLOSE**


Commit responses and remove form from your inbox.

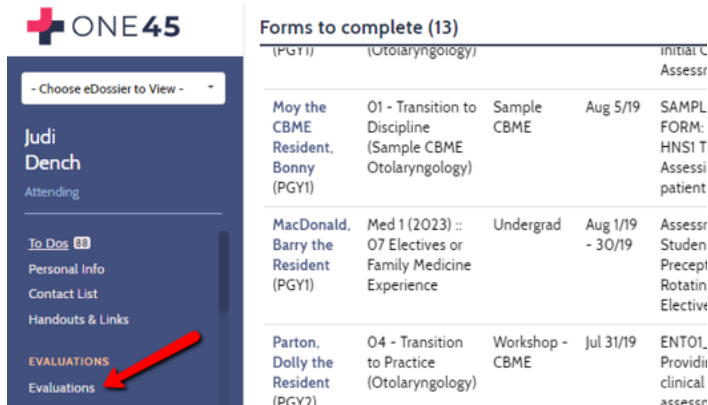
Save current responses and keep form available in your inbox for revision.

CANCEL

Discard any changes to responses and keep form available in inbox for completion.

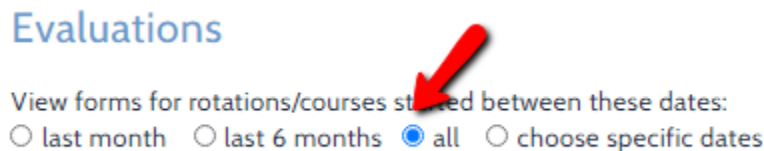
Reviewing forms you previously completed (Desktop and Mobile)

- To look at forms you have completed previously, click *Evaluations*. (If you are using a mobile device, you will need to click on the Menu button first )



(PGY1)	(Otolaryngology)			Initial C
Moy the CBME Resident, Bonny (PGY1)	01 - Transition to Discipline (Sample CBME Otolaryngology)	Sample CBME	Aug 5/19	SAMPL FORM: HNSI T Assessi patient
MacDonald, Barry the Resident (PGY1)	Med 1 (2023) :: 07 Electives or Family Medicine Experience	Undergrad	Aug 1/19 - 30/19	Assessr Studen Precept Rotatin Electiv
Parton, Dolly the Resident (PGY1)	04 - Transition to Practice (Otolaryngology)	Workshop - CBME	Jul 31/19	ENTO1, Providin clinical assessr

- For quick results, click **all**.

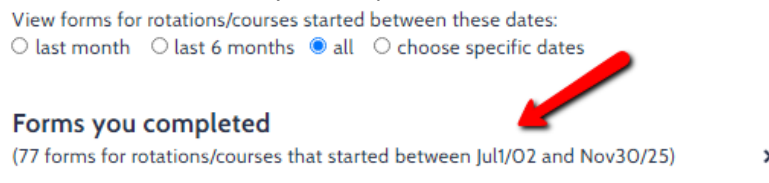


Evaluations

View forms for rotations/courses started between these dates:

last month last 6 months all choose specific dates

- Click the section *Forms you completed*.



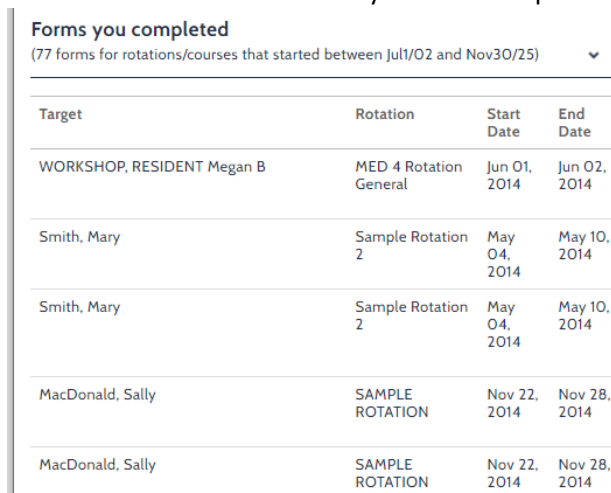
View forms for rotations/courses started between these dates:

last month last 6 months all choose specific dates

Forms you completed

(77 forms for rotations/courses that started between Jul1/02 and Nov30/25) >

- You will now see all the forms you have completed on residents and students.



Target	Rotation	Start Date	End Date
WORKSHOP, RESIDENT Megan B	MED 4 Rotation General	Jun 01, 2014	Jun 02, 2014
Smith, Mary	Sample Rotation 2	May 04, 2014	May 10, 2014
Smith, Mary	Sample Rotation 2	May 04, 2014	May 10, 2014
MacDonald, Sally	SAMPLE ROTATION	Nov 22, 2014	Nov 28, 2014
MacDonald, Sally	SAMPLE ROTATION	Nov 22, 2014	Nov 28, 2014

5. You can sort the results by target name, rotation, start or end date, form, etc.

Forms you completed
(77 forms for rotations/courses that started between Jul1/02 and Nov30/25)

Target	Rotation	Start Date	End Date
Ballantine, R. Latasha the Resident	O1 - Transition to Discipline (Otolaryngology)	Oct 23, 2019	Oct 23, 2019
Ballantine, R. Latasha the Resident	O2 - Foundations of Discipline (Otolaryngology)	Sep 01, 2020	Sep 15, 2020
Ballantine, R. Latasha the Resident	CBME	Aug 26, 2020	Aug 26, 2020

6. For users on a desktop, click the *view* link at the end of each row and the form will open in a new tab.

indicates a mandatory response

Formative In-training Evaluation

Competencies
Please evaluate your student against expectations for his/her level of training

SKILLED CLINICIAN

	Unable to assess	Fails to Meet	Partially Meets	Meets	Exceeds
*1. Obtain a complete and accurate history	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
*2. Complete a thorough and accurate physical examination	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Jul1/02 and Jun26/25) click to view

Form	Group	
new ITER - Surgery (c.03/2014)	Test Space UGME	view
Assessment of Student by Preceptor - Med 3 ITER (FORMATIVE) 12/13	Test Space UGME	view
Assessment of Student by Preceptor - Med 3 ITER (SUMMATIVE) 12/13 (Updated Jan 2013)	Test Space UGME	view
*ITER - Surgery (deactivated 06/01/2017)	Test Space UGME	view
Evaluation of Faculty by student	Test Space UGME	view
Evaluation of Peer - Professional Competencies (c. Oct. 2015)	Test Space UGME	view
Evaluation of Peer - Professional Competencies (c. Oct. 2015)	Test Space UGME	view
dummy NEPH1 - TOD - 1A - Assessing patients with kidney disease	Workshop - CBME	view

7. For users on a mobile device, do the following:

a. Scroll over to the right to access the view menu. Click view for the form you want.


Forms you completed
(77 forms for rotations/courses that started between Jul1/02 and Nov30/25)

Start Date	End Date	Form	Group	
Oct 23, 2019	Oct 23, 2019	SAMPLE FORM: Oto-HNS2 FOD O1: Initial Clinical Assessment	Workshop - CBME	view
Sep 01, 2020	Sep 15, 2020	SAMPLE FORM WITH two answers	Workshop - CBME	view
		SAMPLE Foundations of Discipline Report Card	Test Space PGME	view
		SAMPLE Foundations of Discipline Report Card	Test Space PGME	view
Aug 22, 2018	Sep 18, 2018	ITER - Dermatology	Workshop - CBME	view
Aug 22, 2018	Sep 18, 2018	ITER - Dermatology	Workshop - CBME	view

scroll to the right with your finger

- b. The form will open, on some browsers as a new window, on others in the same window.

Dalhousie University
Workshop - CBME

 Evaluated : Dench, Judi (Attending)
By
Evaluating : **Ballantine, R. Latasha the Resident (Resident) - PGY4**
Rotation : O1 - Transition to Discipline (Otolaryngology)
Dates : Oct 23, 2019
Completed : Feb 28, 2019
on

* 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

- c. If it opened in the same window, hit back on your browser to get back to the one45 interface.