



# RESIDENTS AND ONE45

Triggering Forms and Reviewing CBME Progress

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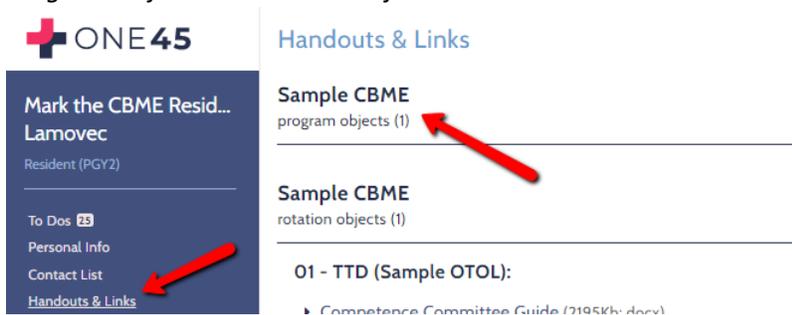
## Residents and CBME: Getting started in one45

Please find instructions below on how to send your preceptors your Entrustable Professional Activity (EPA) forms. See also step-by-step instructions for tracking your progress using specific-CBME reports that allow you to look at your progress in different ways.

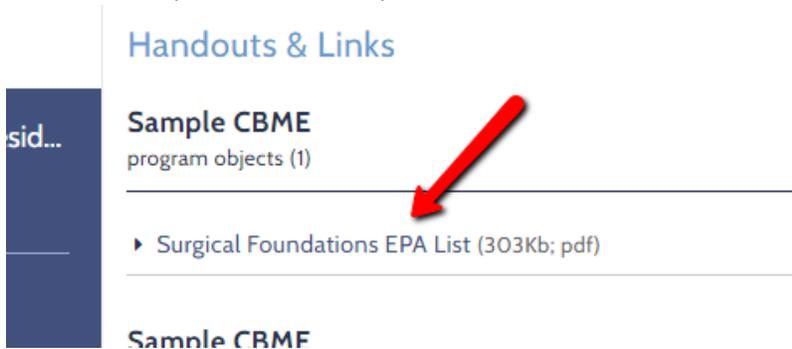
### Knowing the EPAs and their requirements

Note there is no way for you to preview blank EPA forms in one45 prior to sending them to your assessors. 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. Open a browser on your mobile device or desktop (Chrome, Firefox, Microsoft Edge, or Safari) and navigate to <https://one45.med.dal.ca>.
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 .



## Sending an EPA form to an assessor

### Triggering the form (Desktop version)

1. Open a browser window (Chrome, Firefox, or Microsoft Edge only).
2. Navigate to <https://one45.med.dal.ca> and log in with your NetID and password.
3. In your ToDos, you will see a list of forms under *Forms to send*.

ONE45  
YOUR TO DOS: 4 expand all collapse all

Choose proposal

Forms to send

Choose a new form to send

Form	Assessment
SAMPLE FORM: Oto-HNS2 FOD 1: Initial Clinical Assessment	of me
SAMPLE FORM: Oto-HNS2 FOD 2: Initial Management	of me
SAMPLE FORM: Oto-HNS2 FOD 2: Initial Management (COHORT 2)	of me
SAMPLE FORM: Oto-HNS2 FOD 3: Nasal Obstruction	of me
SAMPLE FORM: Oto-HNS2 FOD 4: Difficult Airway Procedures	of me
SAMPLE FORM: Oto-HNS2 FOD 5: Assessing patients and integrating clinical information in the evaluation of disease process	of me

4. If you have the option, pick which rotation you would like to send the EPA assessment from. Otherwise, the default is selected, as seen below. Click *Continue to step 2*.

Step 1 - Select an event

Jun 1, 2019 - Jun 30, 2019 Surgical Foundations - Foundations of Discipline (Surgical Foundations)

Surgical Foundations - Foundations of Discipline (Surgical Foundations)

Jun 1, 2019 - Jun 30, 2019

Continue to step 2 →

5. Specify the date the EPA was assessed. Click *Continue to step 3*.

Step 2 - Select a date

Jun 03, 2019

Jun 03, 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
30	1	2	3	4	5	6

Today Done

Back to step 1

Continue to step 3 →

6. Search for the faculty member you are looking for, check their name, and click *Send form*.

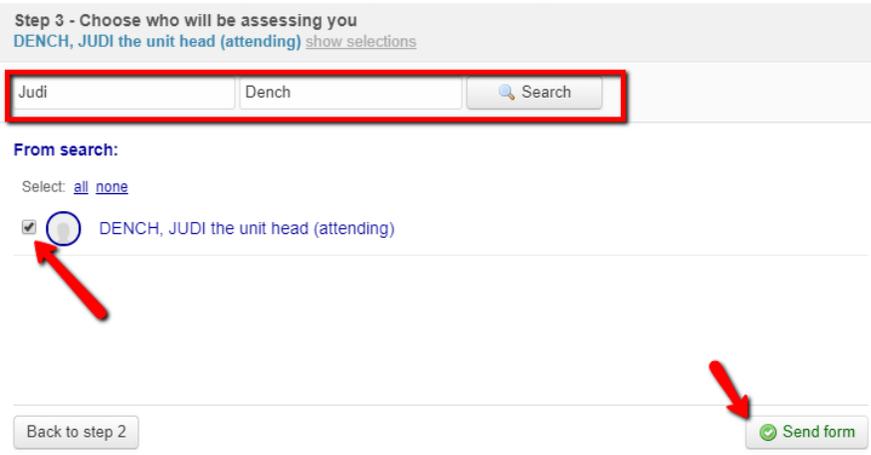
Step 3 - Choose who will be assessing you  
DENCH, JUDI the unit head (attending) [show selections](#)

Judi Dench Search

**From search:**  
Select: [all](#) [none](#)

DENCH, JUDI the unit head (attending)

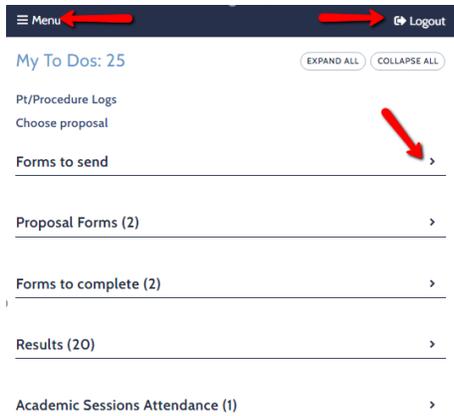
Back to step 2 Send form



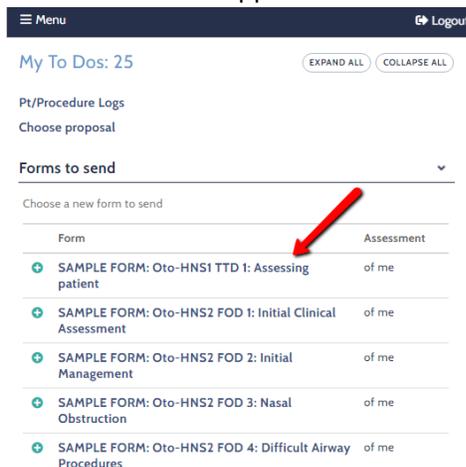
7. Your faculty member will receive the form in their ToDos and can now fill it out.

## Triggering the form (Mobile version)

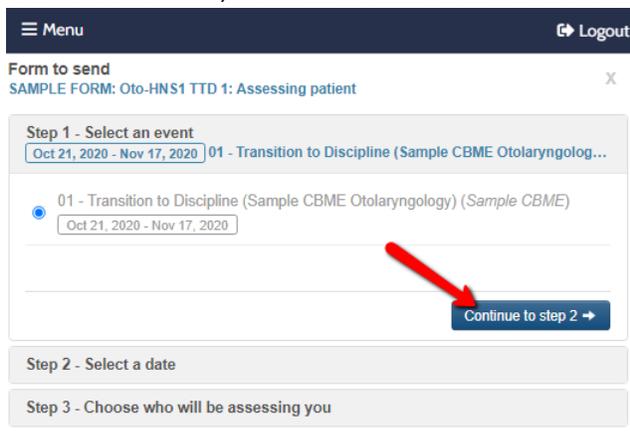
1. Open a browser window on your handheld device
2. Navigate to <https://one45.med.dal.ca> and log in with your Dalhousie NetID and password.
3. You will be taken to your ToDos. Note that logout is to the right, a menu with other options is to the left, and you have several categories of ToDos to pick from. Click *Forms to Send*.



4. A list of forms will appear. Pick the one you wish to send to an assessor.



5. If you have the option, pick which rotation you would like to send the EPA assessment from. Otherwise, the default is selected, as seen below. Click *Continue to step 2*.



6. Specify the date the EPA was assessed. Click *Continue to step 3*.

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

Step 1 - Select an event  
Oct 21, 2020 - Nov 17, 2020 01 - Transition to Discipline (Sample CBME Otolaryngolog...

Step 2 - Select a date  
Oct 28, 2020

Oct 28, 2020

Switch to date range

Back to step 1

Continue to step 3 →

Step 3 - Choose who will be assessing you

7. Your program may already have faculty names you can pick from for this form. If not, or if the person you want is not there, you can search for the faculty member. Once you see the name you are looking for below, check the box to the left of their name, and click *Send form*.

Step 3 - Choose who will be assessing you  
Dench, Judi (attending) show selections

Pick from suggestions or

First name Dench Search

From suggestions:

Select: all none

Dench, Judi (attending)

Palmer, Patsy the tutor (attending)

Windsor the Program Director, Barbara (attending)

Back to step 2

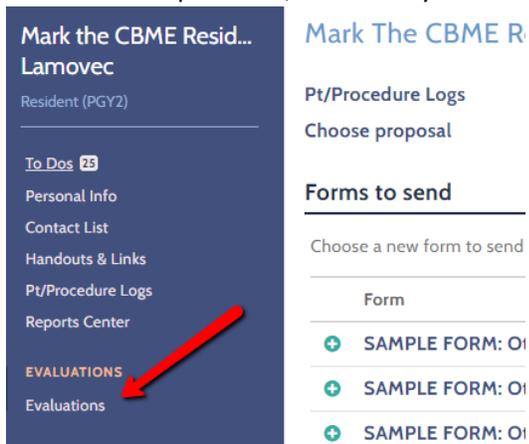
Send form

8. Your faculty member will receive the form in their ToDos and can now fill it out.

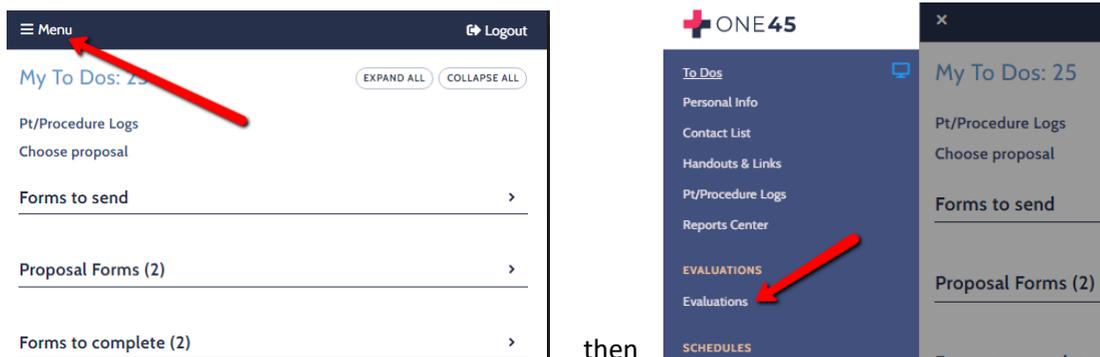
## Checking the status of and reviewing individual EPAs (Desktop and Mobile)

You may want to check if the faculty has completed the EPA or you may wish to view the result of that form. You can do this in your Evaluations menu.

1. For the desktop version, the menu you need is simply to the left. Click *Evaluations*.



- a. For the mobile version, click *Menu* and a menu will appear on the side. Click *Evaluations*.



2. You will see a list of forms. The form with the most recent FROM date will appear at the top. Forms that are not complete will have a letter P next to the evaluator's name (click the *p* to preview/print the blank form) and have no date under the *Done* column. Checking periodically will alert you if the assessor has not completed the form and may need a reminder.

### My Evaluations And Assessments

OF ME		BY ME				
Activity	From	To	Year	Evaluator	Form name	Done
01 - Transition to Discipline (Sample CBME Otolaryngology) (Sample CBME)	Oct 28	Oct 28	2020	Dench, Judi <b>p</b>	SAMPLE FORM: Oto-HNS1 TTD 1: Assessing patient	
02 - Foundations of Discipline (Sample CBME Otolaryngology) (Sample CBME)	Oct 15	Oct 15		<u>Dench, Judi</u>	SAMPLE FORM: Oto-HNS2 FOD 3: Nasal Obstruction	Oct 15/20

- Once the form is done, it will have a date under the Done column and the name of the evaluator will be hyperlinked. Click on the hyperlink to view the completed form.

**My Evaluations And Assessments**

OF ME BY ME

Activity	From	To	Year	Evaluator	Form name	Done
O1 - Transition to Discipline (Sample CBME Otolaryngology) (Sample CBME)	Oct 28	Oct 28	2020	Dench, Judi	SAMPLE FORM: Oto-HNS1 TTD 1: Assessing patient	
O2 - Foundations of Discipline (Sample CBME Otolaryngology) (Sample CBME)	Oct 15	Oct 15		<a href="#">Dench, Judi</a>	SAMPLE FORM: Oto-HNS2 FOD 3: Nasal Obstruction	Oct 15/20

- If you can't find a form you were expecting to see, talk to your Program Administrator. Some forms are specified by a department NOT to be returned to the resident.
- You will also see the completed EPA forms in your Todos. You will need to view and sign off on these EPAs in order to remove them from your Todos. Note your program administrator and program director can see if you have viewed and signed off on your forms or not.

Menu Logout

Choose proposal

---

Forms to send >

---

Proposal Forms (2) >

---

Forms to complete (2) >

---

Results (20) v

Please confirm your results by answering the question at the end of the following: (\*if you are unable to click a result below, please complete your outstanding forms above or you may have to wait until the end of the session dates.)

Evaluator	Activity	Program	Dates	Form
Dench, Judi	O2 - Foundations of Discipline (Sample CBME Otolaryngology)	Sample CBME	Sep 24/20	SAMPLE FORM: (HNS2 F) Narrativ Observe
French (one45 administrator), Kevin	O1 - Transition to Discipline (Sample CBME Otolaryngology)	Sample CBME	Jun 25/20	SAMPLE FORM: (HNS1 TT) Assessir patient

Dalhousie University  
Sample CBME

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Evaluated : Dench, Judi (Attending)  
By  
Evaluating : Lamovec, Mark the CBME Resident (Resident) - PGY2  
Rotation : O2 -Foundations of Discipline (Sample CBME Otolaryngology)  
Dates : Sep 24, 2020  
Completed: Sep 28, 2020  
on

---

\* indicates a mandatory response

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.

See the instructions in Resident Progress in One45 to track your progress generally.

## Sending an EPA form to yourself to evaluate a junior learner (Overview)

Most departments rely on the junior learner to trigger EPA forms for senior residents to complete. However, some departments allow senior residents to trigger the forms themselves. If your department is one of the latter, you can trigger these forms much the same way you do your own.

### Triggering the form (Desktop version)

1. Log into one45 on a browser on your desktop, <https://one45.med.dal.ca>.
2. You will be taken to your ToDos. If your department allows you to trigger forms on junior learners, the forms will appear in your Forms to Send section and will be designated with "by me." Click on the form name to begin.

The screenshot shows a user interface for a resident named Lamovec. The left sidebar contains navigation options like 'To Dos', 'Personal Info', 'Contact List', 'Handouts & Links', 'Pt/Procedure Logs', 'Reports Center', 'EVALUATIONS', 'SCHEDULES', and 'ACADEMIC SESSIONS'. The main content area is titled 'Mark The CBME Resident's To Dos: 26' and includes buttons for 'EXPAND ALL' and 'COLLAPSE ALL'. Below this, there are sections for 'Pt/Procedure Logs', 'Choose proposal', and 'Forms to send'. The 'Forms to send' section contains a table with columns for 'Form' and 'Assessment'. The table lists several sample forms, with the last one, 'SAMPLE FORM: Oto-HNS2 FOD 5: Assessing patients and integrating clinical information in the evaluation of disease process', marked as 'by me' in a red box. A red arrow points to this form.

Form	Assessment
+ SAMPLE FORM: Oto-HNS1 TTD 1: Assessing patient	of me
+ SAMPLE FORM: Oto-HNS2 FOD 1: Initial Clinical Assessment	of me
+ SAMPLE FORM: Oto-HNS2 FOD 2: Initial Management	of me
+ SAMPLE FORM: Oto-HNS2 FOD 3: Nasal Obstruction	of me
+ SAMPLE FORM: Oto-HNS2 FOD 4: Difficult Airway Procedures	of me
+ SAMPLE FORM: Oto-HNS2 FOD 5: Assessing patients and integrating clinical information in the evaluation of disease process	of me
+ SAMPLE FORM: Oto-HNS2 FOD 5: Assessing patients and integrating clinical information in the evaluation of disease process	by me

3. The system will ask you what rotation you would like the form to be associated with. Most likely, it will default to a rotation named after a CBME stage. Pick the rotation, if an option, and click *Continue to step 2*.

The screenshot shows a dialog box titled 'Form to send' with a close button (X). The main content is 'Step 1 - Select an event'. It displays a list of rotations: 'Nov 18, 2020 - Jun 30, 2021 02 - Foundations of Discipline (Sample CBME Otolaryngology) (Sample CBME)'. The second rotation, '02 - Foundations of Discipline (Sample CBME Otolaryngology) (Sample CBME)', is selected with a radio button. Below the list is a 'Continue to step 2' button with a right arrow, which is highlighted by a red arrow.

4. The system will not ask you to designate the date you observed the junior resident doing the EPA. Enter the date then click *Continue to step 3*.

Form to send  
SAMPLE FORM: Oto-HNS2 FOD 5: Assessing patients and integrating clinical information in the ...

Step 1 - Select an event  
Nov 18, 2020 - Jun 30, 2021 02 - Foundations of Discipline (Sample CBME Otolaryngology) (Sample CBME)

Step 2 - Select a date  
Nov 18, 2020

Nov 18, 2020

Switch to date range

Back to step 1

Continue to step 3 →

Step 3 - Choose who you will be assessing

5. The system will now ask you to designate the TARGET of the evaluation. You can find who you want to evaluate by either searching for their name or looking through and checking names from the provided suggestions, a list of residents currently scheduled for the rotation you picked previously.

Step 3 - Choose who you will be assessing  
Ballantine, R. Latasha the Resident (resident) show selections

Pick from suggestions or First name Ballantine Search

From suggestions:

Select: all none

Ballantine, R. Latasha the Resident (resident)

Moy the CBME Resident, Bonny (resident)

Back to step 2

Send form

6. The form will open and you can then complete it on the junior learner.

Dalhousie University  
Sample CBME

Evaluated By: Lamovec, Mark the CBME Resident (Resident) - PGY2  
Evaluating : Ballantine, R. Latasha the Resident (Resident) - PGY4  
Rotation : 02 - Foundations of Discipline (Sample CBME Otolaryngology)  
Dates : Nov 18, 2020

\* indicates a mandatory response

Otolaryngology - Head and Neck Surgery: Foundations of Discipline EPA #5  
Assessing patients and integrating clinical information in the evaluation of disease process

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.

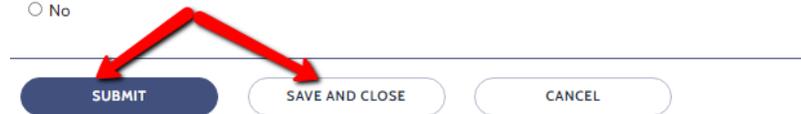
7. When you are ready to submit the form, click *Submit*.

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

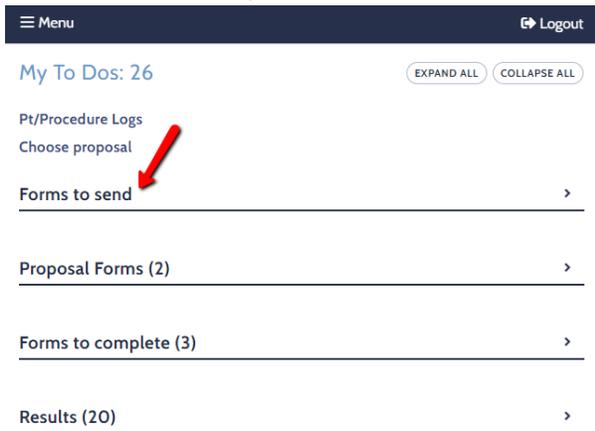
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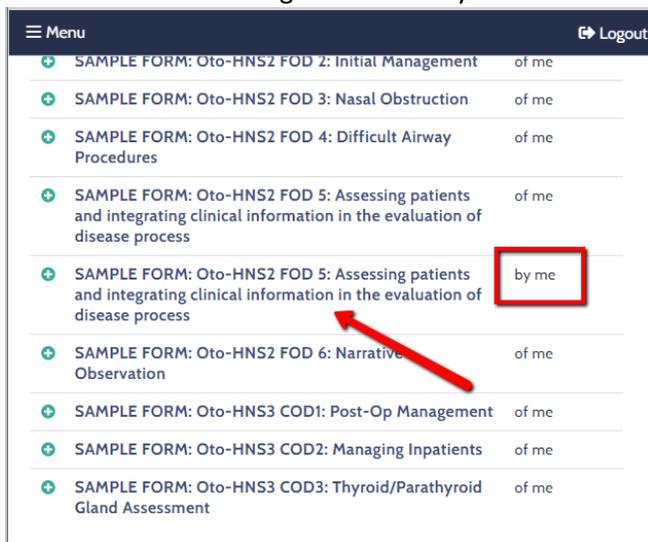
<b>SUBMIT</b>	<b>SAVE AND CLOSE</b>	<b>CANCEL</b>
Commit responses and remove form from your inbox.	Save current responses and keep form available in your inbox for revision.	Discard any changes to responses and keep form available in inbox for completion.

## Triggering the form (Mobile version)

1. Log into one45 on a browser on your mobile device, <https://one45.med.dal.ca>.
2. You will be taken to your ToDos. Click *Forms to Send* to find the EPA you wish to trigger.



3. If your department allows you to trigger forms on junior learners, the forms will appear in your *Forms to Send* section and will be designated with "by me." Click on the form name to begin.



4. The system will ask you what rotation you would like the form to be associated with. Most likely, it will default to a rotation named after a CBME stage. Pick the rotation, if an option, and click *Continue to step 2*.



- The system will not ask you to designate the date you observed the junior resident doing the EPA. Enter the date then click *Continue to step 3*.

**Step 1 - Select an event**  
 Nov 18, 2020 - Jun 30, 2021 O2 -Foundations of Discipline (Sample CBME Otolaryngology) (S...)

**Step 2 - Select a date**  
 Nov 18, 2020

Nov 18, 2020

Switch to date range

Back to step 1 Continue to step 3 →

- The system will now ask you to designate the TARGET of the evaluation. You can find who you want to evaluate by either searching for their name or looking through and checking names from the provided suggestions, a list of residents currently scheduled for the rotation you picked previously.

**Step 3 - Choose who you will be assessing**  
 Moy the CBME Resident, Bonny (resident) [show selections](#)

Pick from suggestions or

First name Moy Search

**From search:**  
 Select: [all](#) [none](#)

Moy the CBME Resident, Bonny (resident)

Moyer, Rebecca (attending)

Back to step 2 Send form

- The form will open and you can then complete it on the junior learner.

Dalhousie University  
 Sample CBME

Evaluated By: Lamovec, Mark the CBME Resident (Resident) - PGY2  
 Evaluating : Ballantine, R. Latasha the Resident (Resident) - PGY4  
 Rotation : O2 -Foundations of Discipline (Sample CBME Otolaryngology)  
 Dates : Nov 18, 2020

\* indicates a mandatory response

**Otolaryngology - Head and Neck Surgery: Foundations of Discipline EPA #5**  
 Assessing patients and integrating clinical information in the evaluation of disease process

**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.

- 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** **SAVE AND CLOSE** **CANCEL**

Commit responses and remove form from your inbox.

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

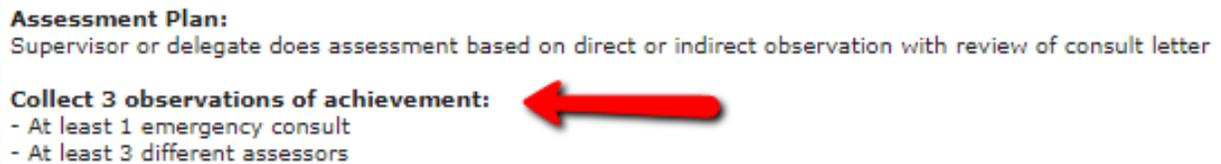
Discard any changes to responses and keep form available in inbox for completion.

## Resident progress in one45

### Tracking your CBME progress overview

There are several methods of tracking EPA completion in your Competency-based Medical Education (CBME) program. Once faculty have completed EPA forms with you as the subject, you will need to regularly determine if those results satisfy EPA assessment plan requirements and if you need to continue triggering specific EPA forms. See example of assessment plan requirements in an EPA form:

*The sample Foundations of Discipline EPA 1 form below requires that you collect at least 3 observations of achievement. Of those, at least one must be an emergency consult and at least 3 different assessors had to evaluate you.*



**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

There are many tools in one45 that will allow you to report on this information. Each report has a different purpose whether it's to do a basic tally of EPA forms faculty have not completed yet, to report on your progression with an EPA over time, or to determine if your EPA has been marked as achieved by the competence committee.

### Reports in Your eDossier

The following reports are generated in your *Report Center* in your one45 menu.

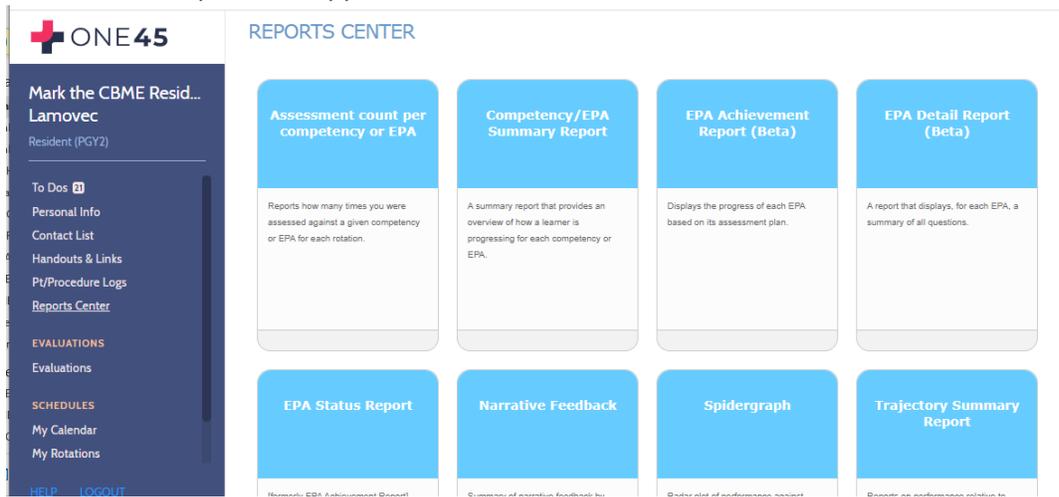
- EPA Achievement Report
- EPA Detail Report
- Competency/EPA Summary Report
- EPA Status Report
- Assessment Count Per Competency or EPA
- Trajectory Summary Report
- Narrative Feedback
- Spidergraph

To access your *Report Center*, follow these steps:

1. In your one45 account, click *Reports Center*.



2. A selection of reports will appear.



Proceed to learn about each report below. We have described them in order of usefulness.

## EPA Achievement Report

**\*NOTE: This report is brand new. Some departments have not set up their assessment plan requirements yet so you will only see a basic “observations of achievement” count.**

This will be one of the most important reports you will use. This report will help you answer questions such as:

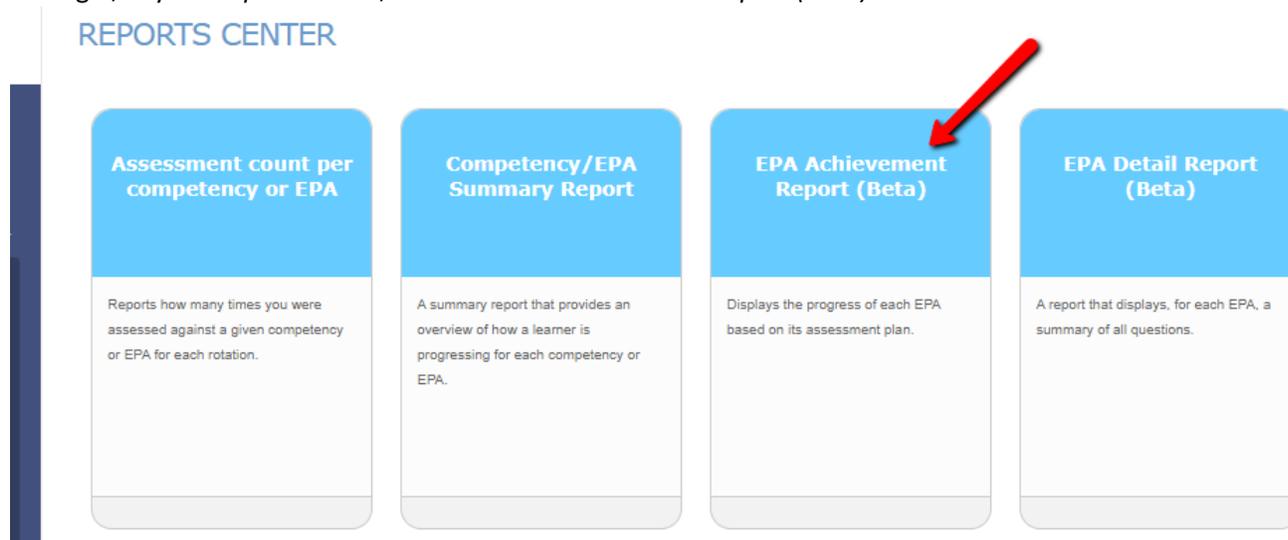
- Did you achieve the minimum number of required observations of achievement?
- Did those observations of achievement also meet the other requirements of the assessment plan? For example, a department may need to know if a specific EPA had several assessors, covered required conditions, or was performed in simulation or not.
- How many times was a specific EPA triggered, completed, and closed without the preceptor completing?

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

- Some EPAs ask for a “variety of hospital settings” or a “mix of conditions.” *Variety* and *mix* do not stipulate exact numbers so one45 would have no way to know if a requirement was met or not.
- Some EPAs have questions with open-ended text boxes for the answer. Again, one45 would have no idea if “Thoracic” entered as an answer and “Thoracic surgery” were the same procedure so cannot tabulate them.
- EPAs that have no overall assessment scales or don’t have five point scales wont be pulled into the report. For example, some departments have Transition to Discipline (TTD) EPAs with an overall assessment score of *In Progress* or *Achieved*. Those EPAs will not populate in this report **at this time**.

Follow the steps below to access this report.

1. To begin, in your *Report Center*, click the *EPA Achievement Report (Beta)*



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



- 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*.

**Create new report**

View assessments between

07/01/2018 and 06/30/2020

Include assessments of

SAMPLE ENT 02 FOD EPAS

**View report**

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

**EPA ACHIEVEMENT REPORT**  
Displays the progress of each EPA based on its assessment plan.

**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 Print

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

EPA Status 100%

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

Evaluation status	Count
Expired/deleted	0
Pending	0
Completed	3
Completed with a min. overall score of 4	2

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

**EPA ACHIEVEMENT REPORT (R. MARK THE RESIDENT LAMOVEC)**

Displays the progress of each EPA based on its assessment plan.

**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.

- 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.

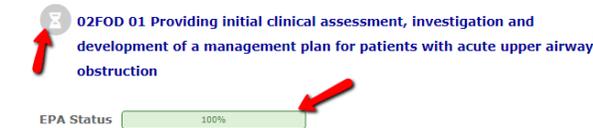
← Reports Center Create new report Print

- 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 resident needs but has acquired, such as specific number of observations of achievement, required procedures or conditions that occurred during that observation, etc.

**02FOD 02 Assessing and providing initial management for patients with a deep neck space infection or peritonsillar abscess**

EPA Status 43%

The hourglass symbol indicates if it an EPA is still in progress and may appear even if the EPA Achievement Report indicates you have met all the criteria.



It will only turn to a green check, an indication of achievement, when your competence committee marks it as such. It will also designate who marked it as achieved and when.



- The criteria section lists all the specific requirements for that EPA. The first criterion lists the minimum number of observations of achievement that must be obtained in order to fulfill that EPA. Some departments determine an observation of achievement as a 5 (*I didn't have to be there*) while others also include 4s as well (*I had to be there just in case*).

The other criteria follow but are tallied only if they coincided with an observation of achievement. It lists how many of each requirement is required, 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 all three of the requirements for that EPA.

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%

- Note, even if you achieve more than the required amount, only the minimum of what achieves the requirement is displayed. This is due to the current design of the system. For example, in the image below, one observation of achievement is required. The resident met that, and this is reflected with a 1 in the column “Counted toward required observations.” However, under evaluation status, you can see the resident actually obtained 2 observations of achievement.

EPA Status 100%

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

Evaluation status	Count
Expired/deleted	0
Pending	0
Completed	3
Completed with a min. overall score of 4	2

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

11. NOTE: Some departments might also use the EPA Achievement Report for their Report Cards. It can be used by the Competency Committee to quickly see what EPAs were achieved in their last meeting and what still needs to be worked on. It will also indicate to the Postgrad Office if progression on that stage has occurred.

**SF01TTD-\*Transition to Discipline Report Card**

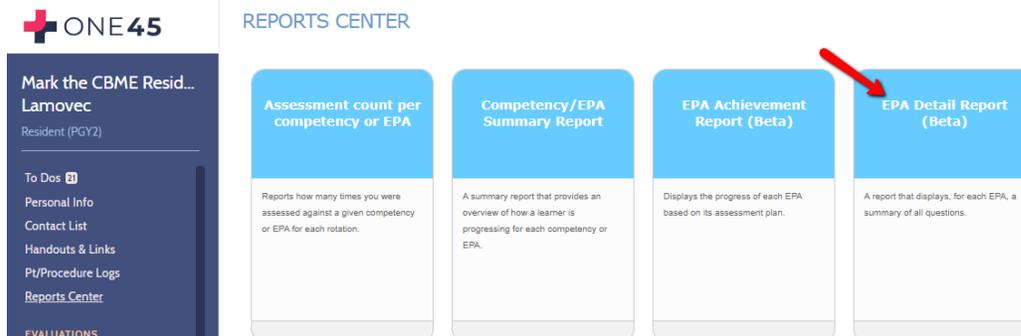
EPA Status 33%

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%

## 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 useful for determining if you have met the requirements of an EPA's assessment plan, especially for those requirements not supported by the EPA Achievement Report. This flexibility exists because you can see EPA summaries based on specific answers to the Overall Question in the EPAs.

1. Click on the *EPA Detail Report* in your *Report Center*.



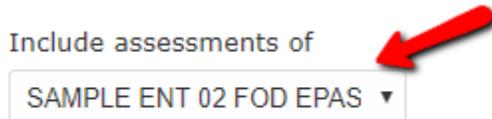
2. Specify the date range that covers the EPAs you wish to look at. Remember that if you are a second-year or later resident, you might have EPAs from stages spanning multiple years. You may need to set the start date to a year or more back.



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 only used on a few questions in a couple of departments.



4. Specify the mapping list you wish to use. Mapping lists usually contain all the EPAs you want to review. Some departments' have their mapping lists divided by stage (Surgical Foundations 01 Transition to Discipline, Surgical Foundations 02 Foundations of Discipline, etc.) while others have one list for all their EPAs (All ENT EPAs). When ready, click *View report*.



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



6. Click Run Report.

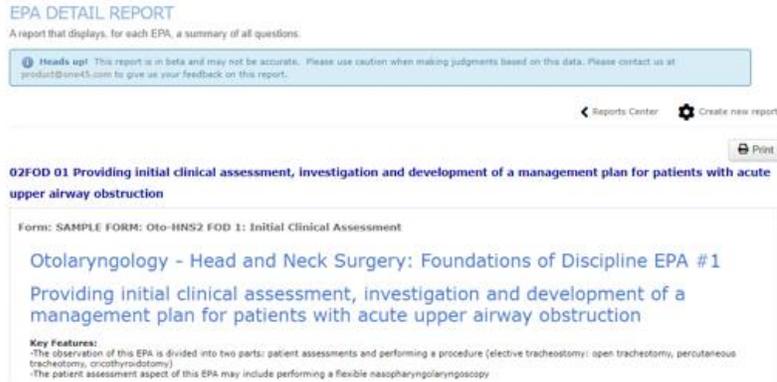


- One45 will now generate your report. The report will load with varying speeds, depending on the number of forms you included.

**Generating report**



- 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.



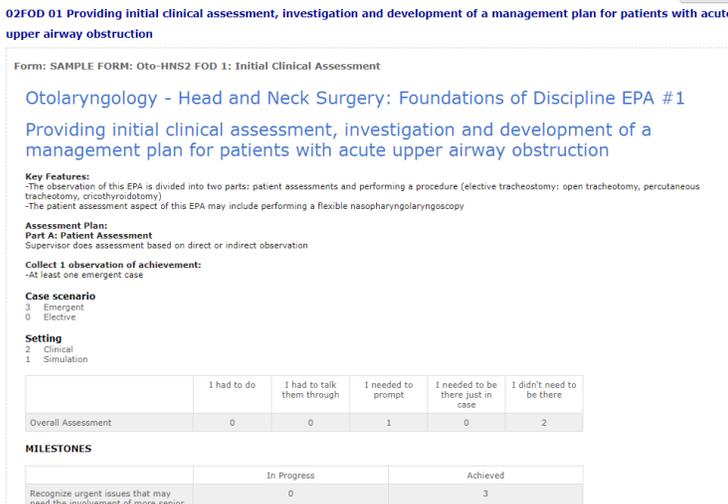
- Let's break it down in detail. At the top is a warning. This is a new report and might need modification as time goes on. This warning serves to warn residents and CC members not to rely ONLY on this report for determining completion of an EPA (as they should not be doing anyway).



- 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.



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



12. The problem with running the report for ALL responses is that 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.

← Reports Center  Create new report ▾

 Print

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

Overall score

Select all / Select none

1  2  3  4  5  6



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
<strong>Perform a head and neck physical exam</strong>	0	1

16. Each EPA will appear one after the other.

**Professionalism and Patient Safety:**

**Do you have any concerns regarding this Learner's professionalism?**  
0 Yes  
1 No

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

If yes, description of Concern:

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

Form: SAMPLE FORM: Oto-HNS2 FOD 3: Nasal Obstruction

Otolaryngology - Head and Neck Surgery: Foundation EPA #3

Assessing and providing initial management for patients with nasal obstruction

**Key Features:**

- This EPA includes performing a flexible nasopharyngolaryngoscopy and may include rigid sino-nasal endoscopy and/or foreign body removal
- This EPA does not include surgical management



17. This report can be used in conjunction with the EPA Achievement Report to ensure you are meeting your EPA assessment plan requirements.

## Competency/EPA Summary Report

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

### REPORTS CENTER



2. Specify the date range and mapping list you want to report on and click *View Report*. (you may need to include multiple years to capture all the EPAs for that stage.)

### COMPETENCY/EPA SUMMARY REPORT (R.

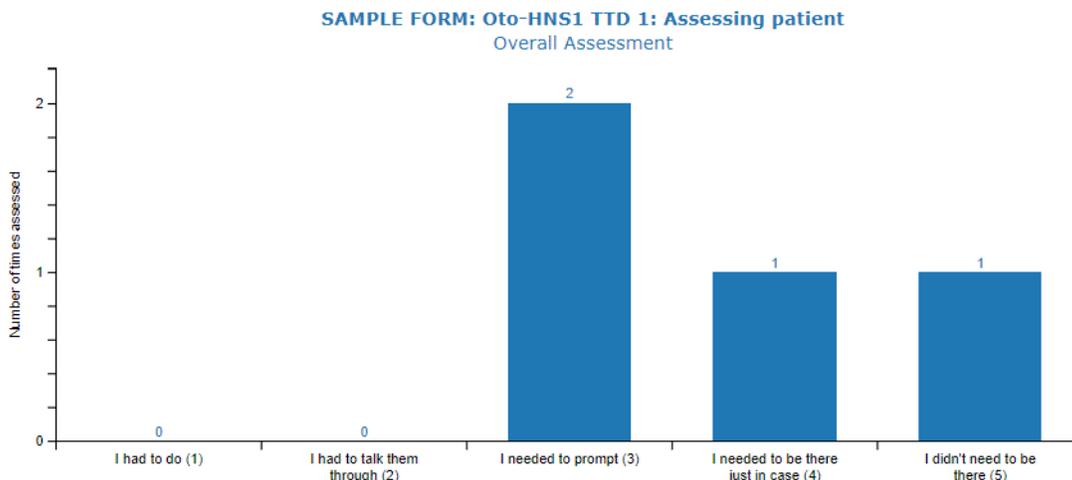
A summary report that provides an overview of how a learner is progressing



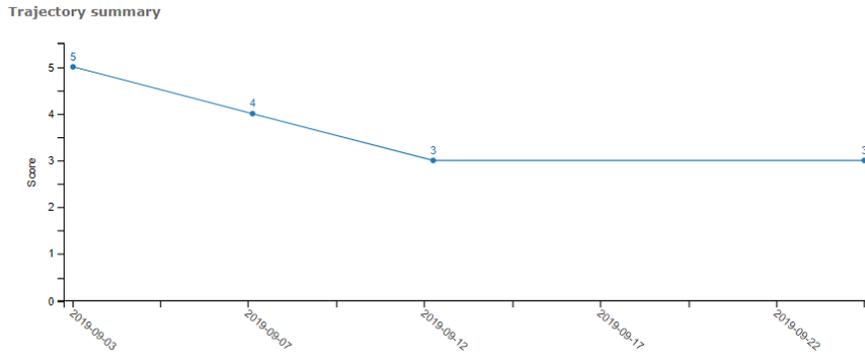
3. one45 will generate, for each EPA in that list, a series of mini-reports in one screen. The first mini-report is a bar graph that shows you the number of forms completed for that EPA and the score from each form's Overall Assessment question.

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

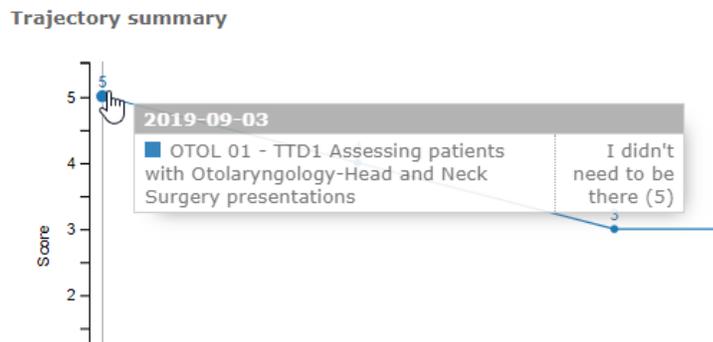
#### Assessment count



- 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.



- 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.



- 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.

Detail feedback

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.

- 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:

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

Dalhousie University  
Sample CBME

Evaluated By : Palmer, Patsy the tutor (Attending)  
Evaluating : Lamovec, Mark the CBME Resident (Resident) - PGY2  
Rotation : O1 - Transition to Discipline (Sample CBME Otolaryngology)  
Dates : Sep 15, 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**  
Non-Emergency

9. The next mini-report is the tally of Narrative feedback. It also lists the date of the event, the evaluator’s name, and the score from the overall assessment.

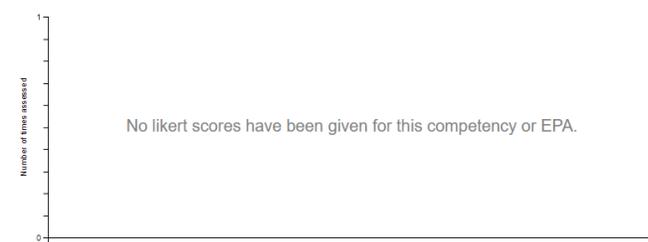
**Narrative feedback**

Start date	End date	Evaluator name	Score	Answer text
13-Sep-2019	13-Sep-2019	Dench, Judi	3	Needed some assistance with examination of cranial nerves but otherwise excellent performance.
08-Sep-2019	08-Sep-2019	Windsor the Program Director, Barbara	4	Excellent work!
25-Sep-2019	25-Sep-2019	Dench, Judi	3	Needs to improve otoscopy skills as well as of examination techniques. Recommend simulations./
03-Sep-2019	03-Sep-2019	Palmer, Patsy the tutor	5	Did professional level work, faculty level skill.

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

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

**Assessment count**



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

**COMPETENCY/EPA SUMMARY REPORT**  
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: 06/26/2020

Reports Center Create new report

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

**Assessment count**

SAMPLE FORM: Oto-HNSI TTD 1: Assessing patient Overall Assessment

## 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*.

**Create new report**

View assessment between

07/01/2019 and 06/30/2020

Include assessments of

SAMPLE ENT EPAS

**Run report**

The screenshot shows a form for creating a new report. It has a title 'Create new report' and a section 'View assessment between' with two date input fields: '07/01/2019' and '06/30/2020'. Below that is a section 'Include assessments of' with a dropdown menu showing 'SAMPLE ENT EPAS'. At the bottom is a blue button labeled 'Run report'. Red arrows point to the date range, the dropdown menu, and the 'Run report' button.

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

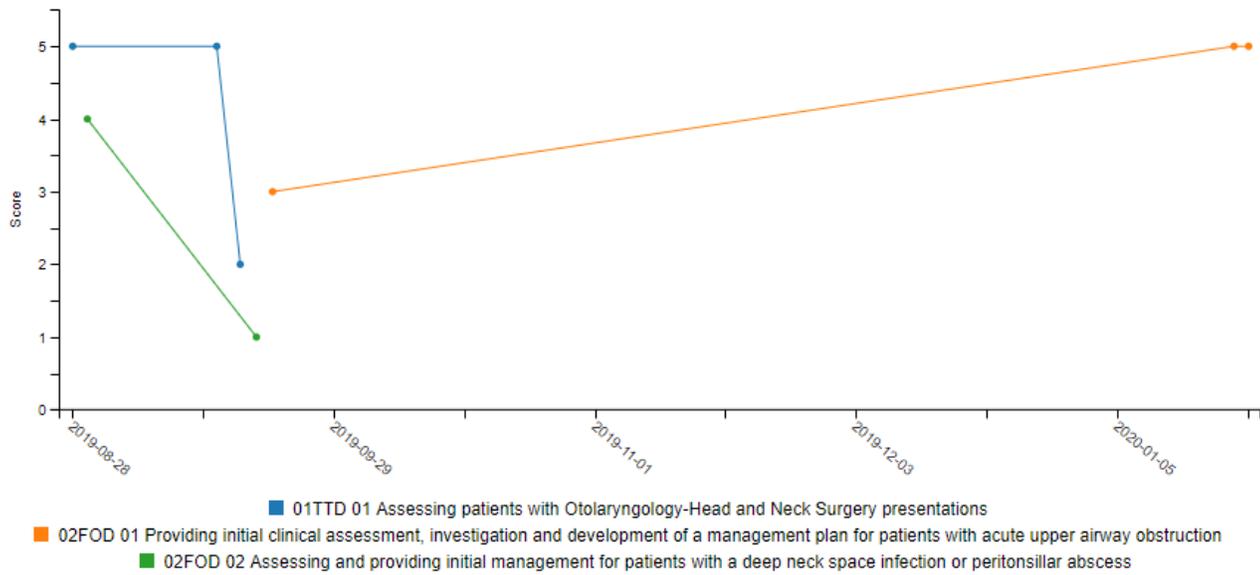
Excel Search

EPA name	Expired/deleted	Pending	Completed	EPAs with min. score of 4	Required
01TTD 01 Assessing patients with Otolaryngology-Head and Neck Surgery presentations	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 necrotic	0	0	2	1	3

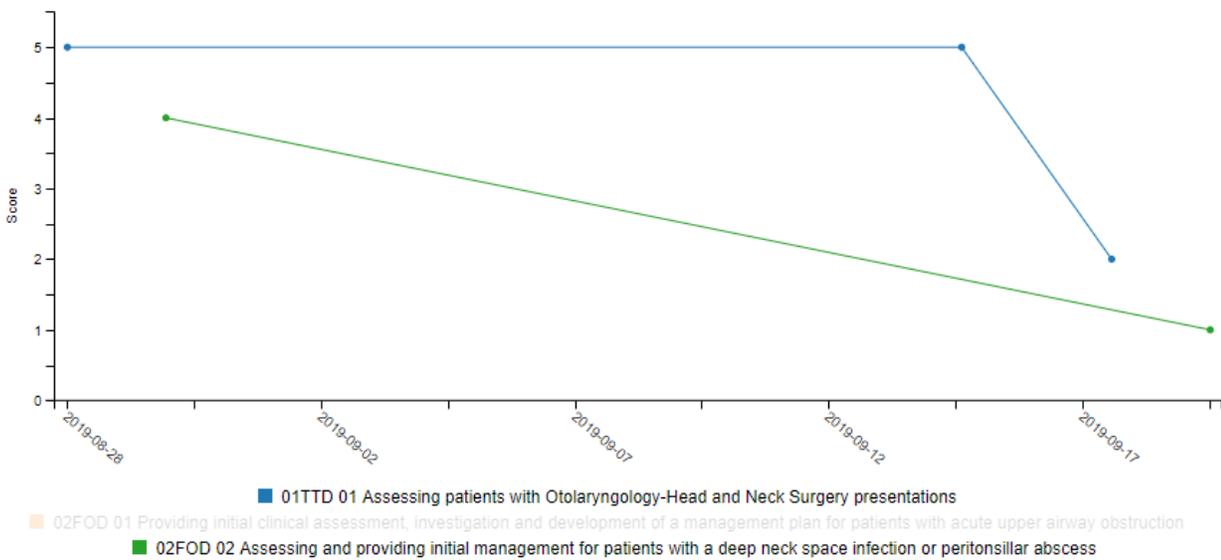
# Trajectory Summary Report

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 presentations	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
<b>Total</b>	<b>3</b>	<b>5</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>8</b>

## 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.