Residents and CBME: Triggering EPA forms/tracking your progress in one45

Please find instructions below on how to send your preceptors your EPA forms. See also step-by-step instructions for tracking your progress using specific-CBME reports and examination of individual EPA forms. one45 adds new features periodically to support CBME so tools other than those listed here may appear. We have also requested specific improvements for residents to track their progress.

**Triggering EPA forms**

1. Log into one45 with your NetID and password.

2. In your ToDos, you will see a list of forms under *Forms to send*.

3. 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*.

4. Specify the date the EPA was assessed. Click *Continue to step 3*. 
5. Search for the faculty member you are looking for, check their name, and click Send form.

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

See the instructions on the next page for tracking these EPA forms.
Tracking and reviewing each EPA form individually
If you have sent several EPA forms, you may lose track of what forms have come back to you and what hasn’t. In order to ascertain what is still outstanding, you can review your EPA forms individually in your Evaluations section of your one45 account. Follow these steps to look at individual forms or save them for review offline.

1. Log into one45.

2. Click on Evaluations on the left side of your one45 menu.

3. You will be taken to your list of completed and outstanding evaluations.

4. On the left is the rotation the EPA form came from and the date of the event. Some departments use a named rotation like the one below:

   Others will have you trigger your forms off rotations based on the stage of CBME you are in, like Foundations of Discipline or Core of Discipline:

5. On the right, if a form has been completed, the evaluator’s name is underlined and the date of completion is listed. If you confirmed receipt of the evaluation, that date is listed as well.
6. If a name is not underlined, it means the evaluator has not completed the form you sent them. (The little \( p \) is clickable and allows you to print the blank form if you desire).

7. Unfortunately, the NAME of the form, which indicates the EPA, is currently not immediately visible in the list. At this time, you have to hover over the name of the evaluator to see the EPA name.

8. Click on any underlined name to view the form the evaluator completed.

The next section outlines how to track your progress with other reporting tools.
Tracking your CBME progress overview

There are several methods of tracking your CBME progress and EPA completion in one45. Tracking how many observations of achievement you have for each EPA is relatively simple with the current reporting tools in one45. However, ascertaining if those observations of achievement also meet specific requirements of the EPA’s assessment plan is a bit more difficult. See the example below.

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

The standard reporting tool will easily be able to tell you if you have the required 3 observations of achievement for that EPA.

However, it will not tell you if you meet the other requirements so you will need to review each EPA form individually.

one45 adds new reporting tools for CBME periodically, and we have stressed the importance of allowing the resident to track the assessment plan information more easily. Residents also have fewer reporting options available to them than the competence committee or program director/administrator do so we have asked them to make it a priority.

Using the CBME Reporting Tool to track your progress

To use the CBME Reporting Tool in one45, follow the directions below. There are multiple reports available.

1. Log into one45.
2. Click on Reports Center in your side menu of your account.
3. Click on Assessment count per competency or EPA

4. Set the date range for the time period you are looking to examine.

5. Pick the EPA list from the dropdown. Note, your department might have them all in one group or have broken them up by stage. Click Run Report when ready.

6. One45 will list all the EPAs on the left and all the rotations you collected them from. Note that most departments run the EPA forms off CBME stage-based rotations only. You can filter the results and hide columns.

7. You will likely only use this report to see if you are triggering some EPAs more than others. It’s useful to tell you where you need to focus your efforts in obtaining EPA feedback from faculty.

Return to the main menu by clicking Reports Center.
8. Click on *Competency/EPA Summary Report*. This will likely be your go-to report.

9. Specify the date range you are looking for, pick the EPA list you are looking for information for, and view your report.

10. The report will list the following items for each EPA in one report:
   a. *Achievement count* (tells you how many observations of achievement you have)

   ![Achievement count chart]

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

   ![Achievement chart]

   b. A trajectory summary. Mouse over each dot on the graph to tell you the dates you received the observation of achievement. This is important for tracking assessment plan information later.
c. Narrative feedback

<table>
<thead>
<tr>
<th>Start date</th>
<th>End date</th>
<th>Evaluator name</th>
<th>Answer text</th>
</tr>
</thead>
<tbody>
<tr>
<td>04-Oct-2017</td>
<td>04-Oct-2017</td>
<td>Palmer, Pat the tutor</td>
<td>Still a bit rough around the edges</td>
</tr>
<tr>
<td>01-Nov-2017</td>
<td>01-Nov-2017</td>
<td>Palmer, Pat the tutor</td>
<td>Should review the skills for this procedure and seek assistance from the simulation lab to prepare them for the next time,</td>
</tr>
<tr>
<td>18-Sep-2017</td>
<td>18-Sep-2017</td>
<td>Palmer, Pat the tutor</td>
<td>THEIR examination of the cranial nerves was not appropriate but better than last time. More simulation time preferred but posted no danger to the patient.</td>
</tr>
<tr>
<td>15-Oct-2018</td>
<td>14-Oct-2018</td>
<td>DESROCHER, Jude the unit head</td>
<td>Much more advanced than last time. However, had to prompt on several concerns. Should seek advice on turning fork technique from simulation lab.</td>
</tr>
<tr>
<td>03-Sep-2018</td>
<td>03-Sep-2018</td>
<td>Winston the Program Director, Barbara</td>
<td>This resident needs much more practice with assessing patients. Was unprofessional (see below)</td>
</tr>
</tbody>
</table>

11. Other reports you can trigger are Narrative Feedback (Narrative Feedback summaries for all EPAs in one report) and Trajectory Summary Report (plots your trajectories for all EPAs on one graph) but you likely won’t use these that often since both are in the previous report:

For Narrative Feedback, you can hide columns of data, filter the results, or export to Excel.

For the Trajectory Report, you can show as many EPAs as there are in your list of available EPAs or reduce them to a few you are particularly interested in by clicking on the names below the chart.
12. This is also a Spidergraph report which plots your performance compared to other EPAs but most residents have not found this useful.

An example of how to use these reports to track your progress

Below find the steps a resident takes to track their progress for a particular EPA. Again, we hope this becomes simpler, with a single quick report in the near future.

1. The resident has already triggered EPA forms to various preceptors. When they received those forms back, they noted their assessment plan for each EPA.

2. After collecting several of the same EPA forms, they go to the Reports Center.

3. They click on the Competency/EPA Summary Report and run it based on the stage and dates they want.

4. The bar chart is checked to see if they meet the basic requirement for number of observations of achievement. If the number matches the minimum or more, they proceed to the trajectory part of the report.
5. The resident notes the dates they obtained observations of achievement. They can hover over the dots to see the dates if it is not obvious from the chart.

6. They click on *Evaluations* in their side menu.

7. Based on the dates noted from step 5, the resident views the forms from those dates, checking if various requirements of the assessment plan were met.

8. This will let the resident know what situations or conditions for a particular EPA that they still need observations of achievement in.

Have suggestions for what you think the reporting tools should contain going forward? Please email *one45@dal.ca* as we are regularly giving feedback.