

How to View Trainee Progress – CBME Dashboard High Level Overview

Target Audience: Program Directors, Program Administrators, Trainees,
Academic Coaches, Competence Committee Members

Updated *January 6, 2021*

ROYAL COLLEGE COMPETENCY BASED MEDICAL EDUCATION MODULE

This document outlines how to navigate the Royal College CBME module and will focus on how to view trainee progress using various tabs available such as the EPA Dashboard and Portfolio Review Dashboard.

SUMMARY OF TABS

Entrustable Professional Activities (EPA)	The EPA dashboard is populated by the completion of CBME/EPA forms. When CBME forms are completed, they will be displayed in the EPA dashboard under the appropriate Stage/EPA.
Supporting Documentation	Files can be uploaded here by PDs, PAs, trainees, academic coaches, and competence committee members.
Reflection Documentation	Files can be uploaded here by trainees.
Assessments	All assessments for the trainee are displayed here along with their completion status (pending, complete, etc). This includes ITARS, WBAs, CBME Forms.
Program Evaluations	Displays trainee completion status of required program evaluations (faculty, rotation, presenter, and event evaluations).
Events	Displays overall event attendance and a breakdown of all academic sessions the trainee has been registered for in the Event Manager.
Activities (Procedures)	Displays activities/procedures that have been logged by the trainee.
Summary Report	Allows PAs, PDs, academic coaches and competence committee members to generate a Learner Summary Report which includes all assessment data on the trainee for the date range specified.
Review Dashboard	Facilitates the competence committee reviews and all applicable documentation relevant to reviews will be in this dashboard.

EPA DASHBOARD

See user guides and videos on 'How to View Trainee Progress – EPA Dashboard Breakdown' for more detailed information on how to navigate the EPA dashboard.

The screenshot shows the EPA Dashboard interface with the following data:

EPA	Program Assessment	Individual Assessment	# of Forms	Level of Supervision/Entrustment	Status	Actions	Comments
Stage 1 - Transition to Discipline	90%				Approved	Mark as In Progress	
EPA 1. PSYCHIATRIC HISTORY	100%		2	0 0 0 0 2	Ready for Review	Mark as In Progress	+ Add note
Collect 2 observations of achievement	100%						
At least 1 by a psychiatrist	100%						
At least 2 different case types	100%						
EPA 2. COMMUNICATING ENCOUNTERS	80%		2	0 0 0 0 2	In Progress	Mark as Achieved	+ Add note
Collect 2 observations of achievement	100%						
At least 1 by a psychiatrist	100%						
At least 1 verbal presentation	100%						
At least 1 history	0%						
At least 1 written/electronic documentation	100%						

Annotations in the screenshot include:

- A red box highlights the 'EPAs' tab in the top navigation bar.
- A red arrow points to the 'Stage' column header.
- A red arrow points to the 'EPA' column header.
- A red arrow points to the 'Requirement' column header.
- Red arrows point to the 'Level of Supervision/Entrustment' column, with a note: "Double click to view completed forms".
- A yellow banner at the top reads: "When CBME forms are completed, the populate the EPA dashboard".

SUPPORTING DOCUMENTATION

Categories	Description	CanMEDS Role	Curriculum Item	Files	Last Updated
Electives	PGY3 elective planning	n/a		test.docx	in 14-Oct-2020 at 11:58
Certificates / Courses	ACLS Certificate	n/a		test.docx	in 14-Oct-2020 at 11:58
Competence committee communication	PGY2 research project abstract	Scholar	QA	test.docx	in 14-Oct-2020 at 11:58
Certificates / Courses	e-module completion certificate	n/a		test.docx	in 14-Oct-2020 at 11:58

ASSESSMENTS

Activity	Start Date	End Date	Evaluation	Trigger	Source	Created By	Evaluator	Evaluatee	Alerts	Status	Action
CTU Sr Med Res-Hamilton General Hospital	25-Aug-2020	21-Sep-2020	ITER - Internal Medicine - CTU Sr Med Res. General Internal Medicine Q	End of Rotation 07-Sep-2020	Distributed	Hanekamp, Nicole 10-Sep-2020	Chui, Betty	Victoria, Sunny Q		Completed 18-Sep-2020	View
CTU Sr Med Res-Hamilton General Hospital	25-Aug-2020	21-Sep-2020	ITER - Internal Medicine - CTU Sr Med Res. General Internal Medicine Q	End of Rotation 07-Sep-2020	Distributed	Hanekamp, Nicole 10-Sep-2020	Ng, Kelvin Kuan Huel	Victoria, Sunny Q		Pending	
Respirology-St. Joseph's Hospital Hamilton	28-Jul-2020	24-Aug-2020	ITER - Internal Medicine - Respirology V2 Q	End of Rotation 10-Aug-2020	Scheduled	Automatic 11-Aug-2020	Neighbour, Helen (Supervisor)	Victoria, Sunny Q		Completed 21-Aug-2020	View
Respirology-St. Joseph's Hospital Hamilton	28-Jul-2020	24-Aug-2020	ITER - Internal Medicine - Respirology V2 Q	End of Rotation 10-Aug-2020	Scheduled	Automatic 11-Aug-2020	Wald, Joshua (Supervisor)	Victoria, Sunny Q		Declined	
Respirology-St. Joseph's Hospital Hamilton	28-Jul-2020	24-Aug-2020	ITER - Internal Medicine - Respirology V2 Q	End of Rotation 10-Aug-2020	Scheduled	Automatic 11-Aug-2020	Amer, Rebecca K (Supervisor)	Victoria, Sunny Q		Pending	
ICU-St. Joseph's Hospital Hamilton	01-Jul-2020	27-Jul-2020	ITER CBME - Internal Medicine - Intensive Care Unit Q	End of Rotation 13-Jul-2020	Distributed	Ligori, Tania 21-Jul-2020	Rudkowski, Jill	Victoria, Sunny Q		Completed 14-Aug-2020	View

PROGRAM EVALUATIONS

Evaluation Type	Completed	Pending	Expired
Event Evaluation	0	0	0
Presenter Evaluation	84	3	22
Rotation Evaluation	16	1	0
Teacher Evaluation	41	2	3

EVENTS

Event Program	Base Location	Event	Event Template	Topic	Event Type	Event Date	Time From	Time To	Participant Status	Attendance Status
Adult Respirology	Hamilton Region [HAMILTON]	0800 ROTATOR LECTURES	0800 ROTATOR LECTURES	N/A	Lecture/Grand Rounds	11-Aug-2020	08:00AM	09:00AM	Participant	Present
Adult Respirology	Hamilton Region [HAMILTON]	0800 ROTATOR LECTURES	0800 ROTATOR LECTURES	N/A	Lecture/Grand Rounds	06-Aug-2020	08:00AM	09:00AM	Participant	Present
Adult Respirology	Hamilton Region [HAMILTON]	0800 ROTATOR LECTURES	0800 ROTATOR LECTURES	N/A	Lecture/Grand Rounds	18-Aug-2020	08:00AM	09:00AM	Participant	Present
Internal Medicine	Hamilton Region [HAMILTON]	AHD - PGY2 - Lung Cancer - Arani Sathiyapalan	AHD - PGY2	Lung Cancer	Lecture/Grand Rounds	19-Aug-2020	02:45PM	04:00PM	Participant	Present
Internal Medicine	Hamilton Region [HAMILTON]	AHD - PGY2 Sarcoid - Anurag Bhatta	AHD - PGY2	Sarcoid	Lecture/Grand Rounds	05-Aug-2020	02:45PM	04:00PM	Participant	Present

ACTIVITIES (PROCEDURES)

Activities for Learner: Arora, Serena Jain [01-Jul-2019 - 30-Jun-2021]			
Activity	Details	Supervisor	Status
EENT - Remove Cerumen			
07-Nov-2019	Location: New Vision Family Health Team Program: Family Medicine Rotation: Family Medicine [Family Medicine]		1 <input type="checkbox"/> <input checked="" type="checkbox"/> Submitted
GI - Paracentesis			
12-Nov-2019	Location: Cambridge Memorial Hospital Program: Family Medicine Rotation: Emergency Medicine		1 <input type="checkbox"/> <input checked="" type="checkbox"/> Submitted

SUMMARY REPORT

See user guides on ‘Sample Learner Summary Report’ and ‘How to Generate a Learner Summary Report’ for more details about the LSR.

Summary Report Settings	
Start Date: <input type="text" value="01-Jul-2020"/>	- PDs, PAs, academic coaches and competence committee members can run the learner summary report - Ability to pull by date range - Select data to be included in the report
End Date: <input type="text" value="30-Sep-2020"/>	
Stage: <input type="checkbox"/> Stage 1 - Transition to Discipline <input checked="" type="checkbox"/> Stage 2 - Foundations of Discipline <input type="checkbox"/> Stage 3 - Core of Discipline <input type="checkbox"/> Stage 4 - Transition to Practice	
EPA: <input checked="" type="checkbox"/> Summary <input checked="" type="checkbox"/> Milestones <input checked="" type="checkbox"/> Comments	
Narrative: <input checked="" type="checkbox"/>	
ITERs/WBAs: <input checked="" type="checkbox"/>	
Activities: <input checked="" type="checkbox"/>	
Attendance: <input checked="" type="checkbox"/>	
<input type="button" value="Generate"/> <input type="button" value="Clear"/>	

REVIEW DASHBOARD

See user guides and videos on ‘How to View Trainee Progress – Competence Committee Review Dashboard’ for more detailed information on how to navigate the Review Dashboard. For Program Administrators, see user guides on ‘How to Setup Competence Committee Review Templates’.

Details | EPAs | Supporting Documentation | Reflection Documentation | Assessments | Program Evaluations | Events | Activities | Summary Report | **Review Dashboard**

PGY2 Review 1 Total: 4

Search: + Add Requirement

Sequence #	Requirement	Responsible for Requirement	Template Files	Files	Due Date	Step Complete	Last Updated
1	Learner Summary Report	Administrator		Shah - LSR (July 1 2020 - Sep 30, 2020).docx		<input checked="" type="checkbox"/>	14-Oct-2020
2	Resident Reflection Report	Trainee	Resident Reflection Template (Foundations).docx	Shah - Completed Stage 2 Reflection.docx		<input checked="" type="checkbox"/>	14-Oct-2020
3	Academic Coach Report	Academic Coach	Academic Coach Report Template (Foundations).docx			<input type="checkbox"/>	
4	Competence Committee Report	Competency Committee	Competence Committee Report Template.docx			<input type="checkbox"/>	

Showing 1 to 4 of 4 entries Show 25 entries First Previous 1 Next Last

Meeting Date:

Date Decision Ratified:

Overall Status:

Purpose of Meeting:

Outcome of Meeting:

Promotion:

Comments:

History Last modified on 14-Oct-2020, 12:09 by Chantelle Sampbell. Save Delete

Click to upload a document (points to the 'Files' column)

Keeps all relevant review materials in one place (points to the top of the dashboard)

Click to view documents (points to the 'Files' column)

Click to download file templates assigned by the PA (points to the 'Template Files' column)

Tracks meeting details and outcomes (points to the form fields)

Dashboard accessible by PDs, PAs, trainees, academic coaches and competence committee members (points to the bottom right)

QUESTIONS?

If you have any questions or difficulties with this process, please contact MedSIS at medsis@mcmaster.ca