

How to View Trainee Progress – EPA and Portfolio Review Dashboards

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

Updated *January 18, 2021*

FAMILY MEDICINE COMPETENCY BASED MEDICAL EDUCATION MODULE

This document outlines how to navigate the Family Medicine 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 FM field notes. When field notes are completed, they will be displayed in the EPA dashboard under the appropriate Domain of Care/EPA
Supporting Documentation	Files can be uploaded here by Admins, Supervisors and Residents
Reflection Documentation	Disregard
Assessments	ITARs and Field notes are displayed here along with their completion status (pending, complete, etc)
Program Evaluations	Displays resident completion status of required program evaluations (faculty, rotation evaluations)
Events	Displays overall event attendance and a breakdown of all academic sessions the resident has been registered for
Activities (Procedures)	Displays activities/procedures that have been logged by the resident (only some residents are using this feature)
Summary Report	Allows Admins and Supervisors to generate a Learner Summary Report which includes all assessment data on the resident for the date range specified
Review Dashboard	All applicable Portfolio Review materials will be available here.

EPA Dashboard

The screenshot shows the EPA Dashboard interface. At the top, there are navigation tabs: Details, **EPA**, Supporting Documentation, Reflection Documentation, Assessments, Program Evaluations, Events, Activities, Summary Report, and Review Dashboard. Below the tabs is a search bar and a table of EPA data. The table has columns for EPA description, # of Forms, and Level of Supervision/Entrustment (with sub-columns for Supervisor Required to Take Over, Close Supervision, Minimal Supervision, Performs with Independence, and Can Teach). Annotations include:

- A red box around the 'EPA' tab with the text: "When field notes are completed, they populate the EPA dashboard".
- A red arrow pointing to the 'Domain of Care' column header with the text: "Domain of Care".
- A red arrow pointing to the 'Entrustable Professional Activity (EPA)' column header with the text: "Entrustable Professional Activity (EPA)".
- A red arrow pointing to the '# of Forms' column with the text: "Double click on the # of Forms or Level of Supervision scores to view individual field notes".

EPA	# of Forms	Level of Supervision/Entrustment					Comments
		Supervisor Required to Take Over	Close Supervision	Minimal Supervision	Performs with Independence	Can Teach	
Domains of Care							
Foundations of Primary Care							
EPA 1. Care for patients with unselected and undifferentiated presentations (all comers)	3	0	1	1	1	0	+ Add note
EPA 2. Care for a diverse population of patients	0	0	0	0	0	0	+ Add note
EPA 3. Provide care using social determinants of health to modify approach to individual patient care	0	0	0	0	0	0	+ Add note
EPA 4. Care of Indigenous people	0	0	0	0	0	0	+ Add note
EPA 5. Safely and appropriately manage pharmaceuticals for all patients	0	0	0	0	0	0	+ Add note
EPA 6. Support continuity of patient care	0	0	0	0	0	0	+ Add note
EPA 7. Adapt to clinical context	0	0	0	0	0	0	+ Add note

Details **EPA's** Supporting Documentation Reflection Documentation Assessments Program Evaluations Events Activities Summary Report Review Dashboard

-- All Data --

Search:

EPA 1. Care for patients with unselected and undifferentiated presentations (all comers)

EPA's Evaluations Total: 3

Activity	Start Date	End Date	Assessment	Evaluator	Status	Actions	1	0	Comments
Rotation: Maternal Child, Location: St. Joseph's Hospital Hamilton, Period: 25-Aug-2020/19-Oct-2020	25-Aug-2020	19-Oct-2020	Family Medicine Field Note	Bracken, Keyna	Completed 01-Sep-2020	View	1	0	+ Add note
Rotation: Maternal Child, Location: St. Joseph's Hospital Hamilton, Period: 25-Aug-2020/19-Oct-2020	25-Aug-2020	19-Oct-2020	Family Medicine Field Note	Bracken, Keyna	Completed 01-Sep-2020	View	0	0	+ Add note
Rotation: Maternal Child, Location: St. Joseph's Hospital Hamilton, Period: 25-Aug-2020/19-Oct-2020	25-Aug-2020	19-Oct-2020	Family Medicine Field Note	Bracken, Keyna	Completed 01-Sep-2020	View	0	0	+ Add note

Showing 1 to 3 of 3 entries Show 25 entries

First Previous 1 Next Last Close

SUPPORTING DOCUMENTATION

Details EPA's **Supporting Documentation** Reflection Documentation Assessments Program Evaluations Events Activities Summary Report Review Dashboard

Click to upload documents [+ Add Documentation](#)

Residents, Admins and Supervisors can upload day to day documentation that might be useful for portfolio reviews

Categories	Description	CanMEDS Role	Curriculum Item	Files	Last Updated
Education plans	test file		Care for patients with unselected and undifferentiated presentations (all comers)	Test file.docx	in 03-Sep-2020 at 18:37
Certificates / Courses	ACLS certificate			Test file.docx	Campbell, Chantelle in 31-Aug-2020 at 12:56
Assessments (non EPA)	OB Birth Log	Medical Expert	Low-risk SVD	Test file.docx	Campbell, Chantelle in 31-Aug-2020 at 12:57
Electives	PGY2 Elective Planning			Test file.docx	Campbell, Chantelle in 31-Aug-2020 at 12:57
Assessments (non EPA)	Leadership Requirement - Presentation Feedback	Leader		Test file.docx	in 31-Aug-2020 at 12:55
Miscellaneous	LOA Form			Test file.docx	in 31-Aug-2020 at 12:58

ASSESSMENTS

Details EPA's Supporting Documentation Reflection Documentation **Assessments** Program Evaluations Events Activities Summary Report Review Dashboard

All field notes and ITARS can be viewed here, including forms that are pending and in-progress so you can see which forms have not yet been completed

Click to expand window

Field Note Evaluation Total: 5

Learner ITER Evaluation Total: 4

Activity	Start Date	End Date	Evaluation	Trigger	Source	Created By	Evaluator	Evaluatee	Alerts	Status	Action	Expiry Date	Feedback
Maternal Child-St. Joseph's Hospital Hamilton	25-Aug-2020	19-Oct-2020	Common Competency Based ITER for FM Residents CBME v2 July 2018 Q	Start of Rotation 25-Aug-2020	On-Demand		Bracken, Keyna		X Not Distributed	Not Distributed	Required Evaluations		
Maternal Child-St. Joseph's Hospital Hamilton	25-Aug-2020	19-Oct-2020	Common Competency Based ITER for FM Residents CBME v2 July 2018 Q	Start of Rotation 25-Aug-2020	On-Demand		Bracken, Keyna		In Progress	In Progress	Required Evaluations	33 days 18-Dec-2020	
CTU Pediatric (MUMC)-McMaster Children's Hospital	28-Jul-2020	24-Aug-2020	Common Competency Based ITER for FM Residents CBME v2 July 2018 Q	End of Rotation 14-Aug-2020	Scheduled		Babic, Bojana (Supervisor)		Pending	Pending	Required Evaluations	29 days 14-Oct-2020	
Pediatric Emergency Medicine-McMaster Children's Hospital	01-Jul-2020	27-Jul-2020	Common Competency Based ITER for FM Residents CBME v2 July 2018 Q	End of Rotation 17-Jul-2020	Scheduled		Koelink, Eric (Supervisor)		Completed	Completed 29-Jul-2020	View		

Showing 1 to 4 of 4 entries Show 15 entries

First Previous 1 Next Last

PROGRAM EVALUATIONS

Program Evaluations				
Search:	Completed	Pending	Expired	Total: 4
<input type="checkbox"/> Evaluation Type				
<input type="checkbox"/> Event Evaluation	2	0	1	
<input type="checkbox"/> Presenter Evaluation	11	0	0	
<input type="checkbox"/> Rotation Evaluation	1	1	0	
<input type="checkbox"/> Teacher Evaluation	2	3	0	

Showing 1 to 4 of 4 entries

EVENTS

Event Attendance: Absent: 1, Exempted: 0, Present: 11

Search: [Q Search] [Absent]

Filter

- Events
 - Event Program
 - Base Location
 - Event
 - Event Template
 - Topic
 - Event Type
 - Time From
 - Time To
 - Attendance Status

Absent
 Exempted
 Present

Apply

Event table displays all events the resident has been registered into and their attendance status at each. Ability to filter the event table

Event Type	Event Date	Time From	Time To	Attendance Status
.../Grand Rounds	12-Aug-2020	02:00PM	04:30PM	Absent

ACTIVITIES (PROCEDURES)

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 Submitted
GI - Paracentesis			
12-Nov-2019	Location: Cambridge Memorial Hospital Program: Family Medicine Rotation: Emergency Medicine		1 Submitted

SUMMARY REPORT

Summary Report Settings

Start Date: 01-Jul-2020
End Date: 31-Aug-2020

EPA: Summary Comments
Narrative:
ITeRs/WBAs:
Activities:
Attendance:

Admins and Supervisors can generate a learner summary report that will display all EPA, ITeR, Activity/Procedure and Attendance data in a summarized report.

Ability to pull by date range.

Select the data to be included in the report.

Generate Clear

REVIEW DASHBOARD

Family Medicine - FM 1.0
Learner: Bhojani, Faizal
Start Date: 01-Jul-2020

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

Initial PGY1 Portfolio Review Total: 6

Search:

Click on templates to download and complete

Requirement	Responsible for Requirement	Template Files	Files	Due Date	Step Complete	Last Updated
1. Learner Summary Report	Administrator		LSR - Bhojani, F.pdf		<input checked="" type="checkbox"/>	16-Sep-2020
2. Age/Sex Report (Hamilton Residents)	Administrator		Age-Sex Report - Bhojani, F.pdf		<input checked="" type="checkbox"/>	16-Sep-2020
3. RCDC Report (Hamilton Residents)	Administrator		RCDC Report - Bhojani, F.pdf		<input checked="" type="checkbox"/>	16-Sep-2020
4. Resident Reflection	Trainee	Resident Reflection Template.docx			<input type="checkbox"/>	
5. Portfolio Review Form	Academic Coach	PGY-1 Initial Portfolio Review Form.pdf			<input type="checkbox"/>	
6. Competence Committee Review	Competency Committee	Competence Committee Resident Report Template.docx			<input type="checkbox"/>	

Showing 1 to 6 of 6 entries | Show 25 entries

Meeting Date: 25-Sep-2020

Date Decision Ratified:

Overall Status: Progressing as expected on schedule

Comments:

SAVE SAVE SAVE!

History | Save | Delete

Family Medicine - FM 1.0
Learner: Bhojani, Faizal
Start Date: 01-Jul-2020

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

Initial PGY1 Portfolio Review Total: 6

Search:

Uploading your completed documents

Requirement	Responsible for Requirement	Template Files	Files	Due Date	Step Complete	Last Updated
1. Learner Summary Report	Administrator		LSR - Bhojani, F.pdf		<input checked="" type="checkbox"/>	16-Sep-2020
2. Age/Sex Report (Hamilton Residents)	Administrator		Age-Sex Report - Bhojani, F.pdf		<input checked="" type="checkbox"/>	16-Sep-2020
3. RCDC Report (Hamilton Residents)	Administrator		RCDC Report - Bhojani, F.pdf		<input checked="" type="checkbox"/>	16-Sep-2020
4. Resident Reflection	Trainee	Resident Reflection Template.docx			<input type="checkbox"/>	
5. Portfolio Review Form	Academic Coach	PGY-1 Initial Portfolio Review Form.pdf			<input type="checkbox"/>	
6. Competence Committee Review	Competency Committee	Competence Committee Resident Report Template.docx			<input type="checkbox"/>	

Showing 1 to 6 of 6 entries | Show 25 entries

Meeting Date: 25-Sep-2020

Date Decision Ratified:

Overall Status: Progressing as expected on schedule

Comments:

Requirement

Requirement: 5. Portfolio Review Form

Responsible for Requirement: Academic Coach

Due Date: DD-MM-YYYY

Step Complete: NO

Template Files:

Files:

3. SAVE! | Save | Delete | Cancel

1. Once you have completed your form, it needs to be uploaded to the dashboard. Click on the requirement to upload your completed form.

2. Drag and drop your file here or click to upload the completed form from your computer. Update the "Step Complete" toggle to "Yes"

History | Save | Delete

QUESTIONS?

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