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 date on the resident for the date range specified
Review Dashboard	All applicable Portfolio Review materials will be available here.

EPA Dashboard

Supporting Documentation

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

Click to upload documents

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

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

Template Record · Hidden Evaluation · Hidden Template

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	Start of Rotation 25-Aug-2020	On-Demand		Bracken, Keyna			✖ 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	Start of Rotation 25-Aug-2020	On-Demand		Bracken, Keyna			⏱ In Progress	Required Evaluations	⏱ 93 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	End of Rotation 14-Aug-2020	Scheduled		Babic, Bojana (Supervisor)			⏱ Pending	Required Evaluations	⏱ 28 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	End of Rotation 17-Jul-2020	Scheduled		Koelink, Eric (Supervisor)			✔ Completed 29-Jul-2020	Q View ▾		

Showing 1 to 4 of 4 entries   Show 15 entries   First Previous 1 Next Last

PROGRAM EVALUATIONS

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

☰ Program Evaluations — Total: 4

Search: _____

Displays how many program evaluations this resident has completed, pending and expired

🗎 Export

Evaluation Type	Completed	Pending	Expired
Event Evaluation	2	0	1
Presenter Evaluation	11	0	0
Rotation Evaluation	1	1	0
Teacher Evaluation	2	3	0

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

EVENTS

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

Event Attendance

Absent: **1**   Exempted: **0**   Present: **11**

Search: 🔍 Search ✕   ...

Events: Absent

▽ Filter   ☑ Show Selected

∨ Events   🔍 Search
- Event Program   **CLEAR SELECTION**
- Base Location   ☑ Absent
- Event   ☐ Exempted
- Event Template   ☐ Present
- Topic
- Event Type
- Time From
- Time To
- **Attendance Status**

🖋 Clear   ✓ Apply   ✕ Close

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

☰ Events — Total: 1

Search: _____   🗎 Export

Event Program	Base Location	Ev...	...ent Type	Event Date	Time From	Time To	Attendance Status
Family Medicine	Stonechurch Family Health Centre [SFHC]	Ha... Gr...	...cture/Grand Rounds	12-Aug-2020	02:00PM	04:30PM	Absent

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

© 1999 – 2020 Knowledge4You Corporation. All rights reserved.

ACTIVITIES (PROCEDURES)

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

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

SUMMARY REPORT

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

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, ITAR, 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

QUESTIONS?

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