



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

Details EPAs Supporting Documentation Reflection Docu	mentation Assessments Program Evaluations	Events Activities S	iummary Report Review Das	board		Supervise Required Take Over 1	o Supervision	Minimal Supervision 3	Performs with Independance	Can Teach
Search:	When field notes are complete populate the EPA dashboard	d, they						/		
EPAs				# of For	ms	Level of Supervision/Ent	ustment		Co	mments
✓ Domains of Care										
V Foundations of Primary Care Company Care	Care						4			
EPA 1. Care for patients with unselected and undifferentiated pr	esentations (all comers)	ble Professional A	ctivity (EPA)	,	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 modif	fy approach to individual patient care		lick on the # of Forms-		0	0 0	0	0	0	+ Add note
EPA 4. Care of Indigenous people			of Supervision scores individual field notes		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	PAs	Supporting Documentation	Reflection Documentation	Assessments	Program Evaluations	Events	Activities	Summary F	Report	Review Das	hboard						
All Data																	
rch:		EPA 1. Care for patients v	vith unselected and undiffe	rentiated prese	ntations (all comers)	-	_	-	-	-		-	-	×			
15		Evaluations												Total: 3			Comments
Domains of Foundation	Activ	vity							Start ^ Date _	End ^ Date _	Assessment	Evaluator	Status	Actions			
EPA 1. C	ar Rotal	tion: Maternal Child, Locatior	n: St. Joseph's Hospital Hamilto	n, Period: 25-Aug	2020/19-Oct-2020				25-Aug-	19-Oct- 2020	Family Medicine Field Note	Bracken,	Complete	Q View	1	0	+ Add note
EPA 2. C	Car								2020	2020		Keyna	01-Sep- 2020		0	0	+ Add note
EPA 3. P	ro Rotal	tion: Maternal Child, Locatior	n: St. Joseph's Hospital Hamilto	n, Period: 25-Aug	2020/19-Oct-2020				25-Aug- 2020	19-Oct- 2020	Family Medicine Field Note	Bracken, Keyna	Complete 01-Sep-	Q View	0	0	+ Add note
EPA 4. C	Car								2020	2020		Reyna	2020		0	0	+ Add note
EPA 5. S	iaf Rotal	tion: Maternal Child, Locatior	n: St. Joseph's Hospital Hamilto	n, Period: 25-Aug	2020/19-Oct-2020				25-Aug- 2020	19-Oct- 2020	Family Medicine Field Note	Bracken, Kevna	Complete 01-Sep-	Q View	0	0	+ Add note
EPA 6. S	iup								2020	2020		Toyna	2020		0	0	+ Add note
EPA 7. A	Sho	wing 1 to 3 of 3 entries Sh	ow 25 🗸 entries									First Pr	revious 1	Next Last	0	0	+ Add note
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EPA 1. R	loi												L	n 01050	0	0	+ Add note

SUPPORTING DOCUMENTATION

Details EPAs Support	ting Documentation	Reflection Documentation	Assessments	Program Evaluations	Events	Activities	Summary Report	Review Dashboard		Click to u	pload documents
				ervisors can uploa useful for portfolio							+ Add Documentation
Categories	Description			CanMEDS Role	C	urriculum Ite	m			Files	Last Updated
Education plans	test file				Ci	are for patient	s with unselected and	d undifferentiated prese	ntations (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	Lo	w-risk SVD				Test file.docx	Campbell, Chantelle in 31-Aug-2020 at 12:57
Electives	PGY2 Elective Plann	ning								Test file.docx	Campbell, Chantelle in 31-Aug-2020 at 12:57
Assessments (non EPA)	Leadership Requirem	nent - 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

	s EPAs Supporting Documentation	Reliect	ion Docun	Assessments Program Evaluations Events	Activities Su	immary Repo	t Review Dashboa	IIG						
È Eva	aluations													
di Evali	luations			All field notes and ITARS can b and in-progress so you can see										·
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E	Field Note Evaluation													Total:
	Learner ITER Evaluation													Total:
A		Start Date	End ^ Date	Evaluation	Trigger	Source	Created By	Evaluator	Evaluatee 🗸	Alerts	Status	Action	Expiry Date	Feedback
	amilton	25- Aug- 2020	19- Oct- 2020	Common Competency Based ITER for FM Residents CBME v2 July 2018 $\ensuremath{\mathbf{Q}}$	Start of Rotation 25-Aug-2020	On- Demand	-	Bracken, Keyna			× Not Distributed	Required Evaluations		
	amilton	25- Aug- 2020	19- Oct- 2020	Common Competency Based ITER for FM Residents CBME v2 July 2018 ${\bf Q}$	Start of Rotation 25-Aug-2020	On- Demand		Bracken, Keyna			O In Progress	Required Evaluations	0 93 days 18-Dec-2020	
		28-Jul- 2020	24- Aug- 2020	Common Competency Based ITER for FM Residents CBME v2 July 2018 $\ensuremath{\mathbf{Q}}$	End of Rotation 14-Aug-2020	Scheduled		Babic, Bojana (Supervisor)	-		O Pending	Required Evaluations	<mark>⊘ 28 days</mark> 14-Oct-2020	
	ediatric Emergency Medicine-McMaster	01-Jul-		Common Competency Based ITER for FM Residents CBME v2 July 2018 Q	End of Rotation 17-Jul-2020	Scheduled		Koelink, Eric (Supervisor)			Completed	Q View 🗸		

McMaster University



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
	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 v entries			First Previous 1 Next Last

EVENTS

Details EPAs Supporting Documentation Reflection Docume	ntation Assessments Program E	Evaluations Events Activities	Summary Report	Review Dashboard				
Event Attendance Absent: 1		Exempted: 0				Present: 11		
Search: Q Search X	···							
Events: Absent	V Filter		Show Selected					
Events	Events Event Program Base Location	Q Search CLEAR SELECTION						Total: 1
Event Program A Base Location	Event	Absent Exempted		rent Type	Event Date		· · · · · · · · · · · · · · · · · · ·	Attendance Status
Family Medicine Centre [SFHC] C Showing 1 to 1 of 1 entries Show 25 v entries		Present		cture/Grand Rounds	12-Aug-2020	02:00PM	04:30PM	Absent Previous 1 Next Last
	Time From		_					
	Time To Attendance Status		X Close	re: the	vent table displays all event table displays all event has been registe eir attendance status at ter the event table	red into and	© 1999 - 2020 Knowledge4You	J Corporation. All rights reserved.

ACTIVITIES (PROCEDURES)

Details EPAs Supporting Documentation Reflection Documentation Assessments Program Evaluations Events	Activities Summary Report Review Dashboard
i≡ Activities for Learner: Arora, Serena Jain [01-Jul-2019 - 30-Jun-2021]	
Activity	^ Details
07-Nov-2019	Location: New Vision Family Health Team Program: Family Medicine Family Medicine Kotation: Family Medicine Family Medicine)
∧ GI - Paracentesis	
12-Nov-2019	Location: Cambridge Memorial Hospital Program: Family Medicine Rotation: Emergency Medicine

SUMMARY REPORT

Deta	s EPAs	Supporting Documentation	Reflection Documentation	Assessments	Program Evaluations	Events	Activities	Summary Report	Review Dashboard
Summ	ary Report S	ttings							
		rt Date: 01-Jul-2020 d Date: 31-Aug-2020 EPA: Summary	W	rill display all ummarized re	upervisors can ge EPA, ITAR, Activit aport. y date range.				
	N	arrative: 🗸			a to be included in	the ren	ort		
	ITER	WBAs: 🗸				the tep	on		
	A	ctivities: 🗸							
	Atte	ndance: 🗸							





REVIEW DASHBOARD

Learner: Bhojani, Faizal						
Start Date: 01-Jul-2020						
						←Ba
Details EPAs Supporting Documen	tation Reflection Documentation Assess	ments Program Evaluations Events Activities Summar	y Report Review Dashboard			
			Click on files to d	lownload and view		
Initial PGY1 Portfolio Review			1			Т
arch:		Click on templates to download ar	nd complete			+ Add Requirem
equirement	^ Responsible for Requirement	C Template Files	Files	🔿 Due Date 🔿 🗄	Step Complete	C Last Updated
Learner Summary Report	Administrator	iempiate rites	LSR - Bhojani, F.pdf	C Due Date C 4	Step Complete	16-Sep-2020
Age/Sex Report (Hamilton Residents)	Administrator		Age-Sex Report - Bhojani, F.pdf		V	16-Sep-2020
RCDC Report (Hamilton Residents)	Administrator		RCDC Report - Bhojani, F.pdf			16-Sep-2020
Resident Reflection	Trainee	Resident Reflection Template.docx			_	
Portfolio Review Form	Academic Coach	PGY-1 Initial Portfolio Review Form.pdf				
Competence Committee Review	Competency Committee	Competence Committee Resident Report Template.docx				
howing 1 to 6 of 6 entries Show 25 🗸						First Previous 1 Next
Meeting Date: 25-Sep-2	2020					
Date Decision Ratified:		Assign the meeting of	late			
		and overall status				
Overall Status: Progress	ing as expected on schedule	v /				
Comments:				SAVE S	SAVE SAVE!	
D History						🖺 Save 📋 f
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Learner: Bhojani, Faizal		Uploading your completed doo	cuments	h.		
Learner: Bhojani, Faizal		Uploading your completed doo	suments	h.		€ Ba
Learner: Bhojani, Faizal Start Date: 01-Jul-2020	ntation Reflection Documentation Assess	Uploading your completed doo		ę.		€ Ba
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QUESTIONS?

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