

ADMINISTRATIVE CHECKLIST – SETTING UP AND MAINTAINING MY CBME LEARNERS

TARGET AUDIENCE: PROGRAM ADMINISTRATORS

Updated November 11, 2024

MEDSIS CBME MODULE

Below is a quick checklist outlining the tasks required in MedSIS to efficiently use the CBME module. Each task below has user documentation and/or videos that will provide further details about that task.

New Trainee Setup

1. Register trainees into the Learning Path
2. Assign trainees to an Academic Coach
3. Create Competence Committee (if not already done so)
4. Assign committee to trainees

Required Training Materials:

1. [Guide: How to Register a Trainee into a Learning Path \(PDF\)](#)
2. [How to Assign Trainees to an Academic Coach \(PDF\)](#)
3. [Guide: How to Create/Update Committees \(PDF\)](#)
4. [Guide: How to Assign Committees to a Trainee \(PDF\)](#)

Current Trainee Maintenance

1. Mark EPAs and stages achieved and approved after Competence Committee and Residency Program Committee decisions have been made.
2. Promote residents to the next appropriate stage of training after committee decisions have been made.
3. Close the trainee's learning path when they finish/leave the program.

Required Training Materials:

1. [Guide: How to Mark Entrustable Professional Activities \(EPAs\) or Stages Achieved and Approved \(PDF\)](#)
2. [Guide: How to Promote a Trainee to the Next Stage \(PDF\)](#)
3. [Guide: How to Close/End a Trainee's Learning Path \(PDF\)](#)

All MedSIS CBME training materials can be found on the MedSIS website organized by audience including a video of a full overview of the CBME module (How to View Trainee Progress – CBME Dashboard)

<https://healthsci.mcmaster.ca/medsis/training/cbme>

QUESTIONS?

If you have any questions or difficulties with this process, please submit a help ticket.

- To submit a ticket, please visit medsishelp.mcmaster.ca.