

EPA EXPORT TYPES: HIGH LEVEL EXPLANATION

TARGET AUDIENCE: CBME OFFICE ADMINISTRATORS, PROGRAM ADMINISTRATORS,
PROGRAM DIRECTORS

Updated October 3, 2024

EPA Export Types

1. Full EPA Export

a. Royal College Programs

The **Full EPA Export** that the MedSIS Team can pull upon request through the following [Google Form](#). Currently includes the following fields:

- Learner CPSO
- Learner Last Name
- Learner First Name
- Learning Path Program
- Learning Path Curriculum
- Stage of Training
- Start of Stage
- End of Stage
- EPA
- EPA Score
- Context Variable 1 -20
- Context Variable 1-20 Value
- Milestone 1-40
- Milestone 1-40 Value

NEW Expanded Export Fields

In addition to the above fields, the Full EPA Export now also includes:

- Observer Name
- Observation Completion Date
- Rotation Name
- Rotation Location
- Rotation Dates
- Comments
- The CanMeds role the milestone is associated with

b. *NEW* Family Medicine Program

The **Family Medicine Full EPA Export** that the MedSIS Team can pull upon request through the following [Google Form](#). Currently includes the following fields:

- Learner CPSO
- Learner Last Name
- Learner First Name
- Learner Base Location

- Learning Path Program
- Learning Path Curriculum
- Domain of Care
- EPA
- EPA Score
- Observer
- Observation Completion Date
- Rotation Name
- Rotation Location
- Rotation Dates
- Comments (separated appropriately by heading: Done Well and Work On)

2. Royal College Export

The **Royal College EPA Export** is another type of export that the MedSIS Team can pull upon request through the following [Google Form](#).

This is a report developed for the Royal College dashboard project. The fields in the report were the minimum data set required by Royal College. **The data is anonymized.**

The Royal College Export includes the following fields:

| Field | Definition | Comments |
|-----------------------------|--|--|
| Institution ID | The institution where the resident is enrolled in training. | McMaster is 44 |
| Specialty ID | The specialty training program of the learner. Each program is assigned an ID number by the Royal College which is included in the technical files | there is a separate list of all the program names and their corresponding ID numbers |
| Resident ID | A unique alphanumeric identifier of the resident. This is intended to identify records that belong to the same learner. | |
| Cohort DT | The program start date for the learner | |
| Stage Start DT | The date the trainee started the stage | There's an issue with this field, for some records it's blank - sitting with K4Y |
| Stage ID | The stage of training the resident was in at the time the observation was submitted | |
| EPA Short Name | The EPA short name assigned by the Royal College which is included in the technical files | |
| EPA Effective Dt | The date this version of the EPA was effective. This will ensure accurate alignment of CBD metrics to different versions of EPA's. | EPA effective dates did not always exist in the technical files. This field was added only when versioning came around so if the field is blank it means no effective date was assigned to that EPA at the time the EPA was imported into MedSIS |
| Observation Initiation Date | The date that a single EPA observation was initiated | |
| Observation Completion Date | The date that a single EPA observation was submitted by the observer | |
| Rating Value | The numeric entrustment score for a single observation of an EPA by an observer | |
| Rating Scale | The max rating value possible for an observation. The default is 5 | |
| Resident Rotation | The rotation the trainee was on when the form was triggered. Includes Rotation Name; Location; Rotation Dates | |
| Context | The contextual variables selected on the EPA form (ie Setting: OR Complexity: High) | |
| Observer ID | A unique alphanumeric identifier of the observer | |
| Observer Type | H: Allied Health Professional R: Trainee O: Other C: Physician S: Student P: Patient | Only the top 4 are Royal College Requirements but we have Student and Patient in MedSIS so I've asked K4Y to assign S to Student and P to Patient. If the Observer Type field is blank, it means that observer was not assigned a type in MedSIS. We did not implement Observer Types until we had several thousands of supervisors in MedSIS. We are working on using some calculations to back track and get some of these assigned a type. |

Example of RC Excel Export File:

| # | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P |
|---|----------------|--------------|-------------|------------|----------------|----------|-------------------|---------------|---------------|---------------|--------------|--------------|---------------------------|-------------------|-------------|---------------|
| 1 | INSTITUTION_ID | SPECIALTY_ID | RESIDENT_ID | COHORT_DT | STAGE_START_DT | STAGE_ID | EPA_SHORT_NAME | EPA_EFFECTIVE | OBSERVATION_I | OBSERVATION_C | RATING_VALUE | RATING_SCALE | RESIDENT_ROTATION | CONTEXT | OBSERVER_ID | OBSERVER_TYPE |
| 2 | 44 | 348 | 9696 | 2018-07-01 | 2018-07-01 | 2 | SURGICAL PROC | 2018-02-06 | 2019-08-04 | 2019-08-28 | 3 | 5 | Rotation: Arthro | Role of observer | 64932 | |
| 3 | 44 | 348 | 10150 | 2018-07-01 | 2018-07-01 | 2 | PRE-OP OPTIMIZ | 2018-02-06 | 2020-04-26 | 2020-05-02 | 5 | 5 | Rotation: Urolog | Patient risk cate | 64912 | |
| 4 | 44 | 136 | 10866 | 2019-07-01 | 2020-06-01 | 3 | ACUTE PRESENTA | 2018-09-06 | 2020-07-07 | 2020-07-12 | 3 | 5 | Rotation: Nephro | Focus of care:ema | 58213 | |
| 5 | 44 | 315 | 10835 | 2020-07-01 | | 2 | FUNDAMENTALS | 2020-07-01 | 2020-08-06 | 2020-08-06 | 3 | 5 | Rotation: ACS JR | Observer Role:gi | 55001 | |
| 6 | 44 | 315 | 8579 | 2020-07-01 | 2020-07-01 | 3 | COLONOSCIPIES | 2020-07-01 | 2020-09-13 | 2020-09-13 | 5 | 5 | Rotation: Genera | Findings:normal | 54773 | |
| 7 | 44 | 348 | 10903 | 2019-07-01 | 2021-03-02 | 2 | CRITICALLY ILL SU | 2018-02-06 | 2020-09-14 | 2020-09-14 | 5 | 5 | Rotation: Pediatr | Case complexity | 66709 | R |
| 8 | 44 | 136 | 12969 | 2021-07-01 | | 1 | INITIAL ASSESSM | 2018-09-06 | 2021-07-17 | 2021-07-17 | 4 | 5 | Rotation: CTU M | Type of patient v | 88197 | C |
| 9 | 44 | 145-A | 12828 | 2021-07-01 | | 1 | HANDOVER | 2020-07-01 | 2021-10-06 | 2021-10-06 | 5 | 5 | Rotation: CTU Medicine Jr | Med Re | 62676 | |

3. Evaluation Schedule Export

The **Evaluation Schedule Export** is essentially a high-level summary that does not include individual evaluation data such as qualitative comments or rating scale scores.

Programs can pull Evaluation Schedule reports at any time that would include both the trigger date and completion date. **This report type does not need to be requested through MedSIS as both Program Directors and Program Administrators have access to pull this information themselves.**

Your PA should be familiar with pulling reports from Evaluation Schedule, but I encourage them to submit a ticket if they require assistance with this.

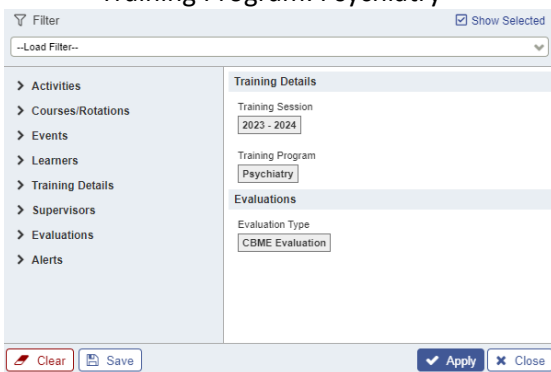
The Evaluation Schedule Export includes the following **key** fields:

- Rotation/Activity Name
- Rotation/Activity Dates
- Evaluator/Supervisor Name
- Evaluatee/Trainee Name
- Form Type/Name
- Trigger Date
- Completion Date
- Form Status (ie: completed, expired, pending, etc.)

Example:

I've included an example below showing all available filter headings (in bold that can be expanded/collapsed) as well as selected filters to pull all CBME Evaluations for a specific training session and program:

- Training Session: 2023- 2024
- Evaluation Type: CBME Evaluation
- Training Program: Psychiatry



However, Program Administrators can add even more filters to include specific trainees or specific supervisors if warranted.

Export Formats

All three types will dump the data into a large excel sheet – *pivot tables are an excellent organizational tool for excel savvy folks.*

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.