ELENTRA USER GUIDE FOR PGME

The purpose of this guide is to provide detailed information and instructions on the use of Elentra for the purpose of competency-based medical education (CBME) for Postgraduate Medical Education (PGME). The guide is divided into several sections including all users, faculty, Academic Advisors, Competence Committee members, Program Directors, Program Administrators and residents.
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1.0 ALL USERS

This section of the manual pertains to all Elentra users whether you are a Resident, Program Administrator, Competence Committee Member, or Program Director.

The topics discussed in this section include:

1.1 Support Contacts
1.2 Browser Limitations
1.3 Saving Elentra as a Shortcut on Desktop and/or Mobile
   1.3.1 Saving as a Shortcut on Desktop
   1.3.2 Saving as a Shortcut on iOS Devices
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1.4 Logging into Elentra
   1.4.1 Elentra Credentials
   1.4.2 Main Page Information
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   1.5.1 Setting PIN
   1.5.2 Secondary Email
1.6 Bookmarks
# 1.1 Support Contacts

<table>
<thead>
<tr>
<th>Contact</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Elentra Support</strong> for Postgraduate and Undergraduate Medical Programs</td>
<td><a href="mailto:Elentra.support@schulich.uwo.ca">Elentra.support@schulich.uwo.ca</a></td>
</tr>
<tr>
<td><em>Questions for Elentra support should be specific to the use of Elentra only. Program-specific questions should be addressed to the Program Director or Program Administrator.</em></td>
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</tr>
<tr>
<td><strong>Schulich Helpdesk</strong> – Schulich IT issues unrelated to Elentra</td>
<td>Website <a href="#">link</a></td>
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<td><strong>WTS</strong> – UWO password reset</td>
<td>Website <a href="#">link</a></td>
</tr>
<tr>
<td><strong>Postgraduate Medical Education Policies</strong></td>
<td>Website <a href="#">link</a></td>
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</table>
1.2 BROWSER LIMITATIONS

It is important to note that Elentra is **NOT compatible with Internet Explorer**. Using Elentra with Internet Explorer will limit its functionality and cause issues. Therefore, it is recommended to use one of the following browsers:

- Google Chrome
- Mozilla Firefox
- Safari
- Microsoft Edge (available on newer hospital computers)

When entering the Elentra website [https://elentra.schulich.uwo.ca/](https://elentra.schulich.uwo.ca/) for the first time, you may see a screen indicating “Your connection is not private” (or similar depending on the browser used). If this occurs, follow these steps:

1. Click Advanced (1), then proceed to the website (2). **Please note: the following screens are from Google Chrome; your screen may vary.**
1.3 SAVING ELENTRA AS A SHORTCUT ON DESKTOP AND/OR MOBILE

Elentra can be used on any desktop and/or iOS or Android device. The following section of this guide shows how to save Elentra as a shortcut on your device in order to navigate to the website easily for continued use.

1.3.1 Saving as a Shortcut on a Desktop Computer

Depending on the browser used, the following step may very slightly. However, the concept should remain the same. The following instructions are specifically for Google Chrome. If you are having difficulties adding the shortcut with your chosen browser, search on the Internet how to create a shortcut with your specific browser for instructions.

On your device’s browser, navigate to [https://elentra.schulich.uwo.ca/](https://elentra.schulich.uwo.ca/).

Drag and drop the icon to the left of the address bar (the padlock) to the desktop as shown in the photo below.
1.3.2 Saving as a Shortcut on iOS Devices

On your device’s browser, navigate to https://elentra.schulich.uwo.ca/.

Tap the Share icon (1), then choose Add to Home Screen (2). Next, change the shortcut title to whatever you wish, and tap Add (3).

Note: the following screenshots are from Safari. Depending on the app you are using, your screen may be slightly different.
1.3.3 Saving as a Shortcut on Android Devices

On your device's browser, navigate to [https://elentra.schulich.uwo.ca/](https://elentra.schulich.uwo.ca/).

Tap the three dots (kebab) icon (1), then choose Add to Home screen (2). Next, change the shortcut title to whatever you wish, and tap Add (3).

1.4 LOGGING INTO ELENTRA

1.4.1 Elentra Credentials

Your username and password will be your Western ID (e.g. janedoe2). Your password is the same as other UWO applications (email, myHR, etc.)

If you do not know this password, you will need to reset it through the Western Identity Manager: [https://identity.uwo.ca/secondary-login?](https://identity.uwo.ca/secondary-login?).

If you have not previously set up your challenge questions, you will need to contact the Computer Accounts Office to reset the password. You will likely need to provide them with your Employee Number and/or other personal information. If you are unsure of what your employee number is, please contact your program’s administration. More information can be found here: [https://wts.uwo.ca/identity/identity_support/support.html](https://wts.uwo.ca/identity/identity_support/support.html).
1.4.2 Main Page Information

When logging into Elentra, you will notice two or three icons in the top right corner of the page, depending on your user permissions. Below gives a brief overview of what these three icons contain. This manual will refer to these areas often and will explain their functionality in greater detail.

**Assessment & Evaluation** – outstanding assessment and evaluations are indicated in the green circle on the top right corner of the screen. Clicking on this icon will take you directly to this page.

**Switch between UME & PGME** – after clicking on the icon indicated, you will then see a drop down where you can choose between UME and PGME. You won’t see this unless you are a member of both organizations.

*Note:* You will have to switch between organizations to see the corresponding number of outstanding assessment and evaluations.

**User Profile** – From this menu you can access your user profile as well as a number of different options depending on your role (student, faculty, etc.) This is also where you will find the logout button.
1.5 PROFILE FEATURES

1.5.1 Setting a PIN

Setting a personal identification number (PIN) allows you to complete an assessment form at the point of contact with a learner without having to log into your Elentra account. In order to set your PIN, follow these instructions:

1. Click on the profile icon (1) in the top right corner, then select My Profile (2).

2. Toggle to Account Information (2). If you have not yet set up a PIN, you can enter it in the corresponding boxes (3). If you have already set up a PIN, and wish to reset it, click Reset PIN (4). Finally, click Save Profile (5).
1.5.2 Secondary Email

Elentra related emails and notifications automatically go to your UWO email account. However, some Elentra users rarely check their UWO mail, and/or have not forwarded their UWO mail to a preferred account. Adding a secondary email allows Elentra to send all automated email messages to a user’s secondary email address in addition to the UWO email. This can be done by the following steps:

1. Click on the profile icon (1) in the top right corner, then select My Profile (2).

2. Enter a Secondary Email (3) and select Use Secondary Email (4). At the bottom right hand of the page, click Save Profile (5).
1.6 BOOKMARKS

You can bookmark any page within Elentra by simply clicking on the Add Bookmark (1) icon in the left-hand side of any Elentra page. You can then input what you wish to title (2) the bookmark and click Submit (3). The bookmark will then be added under “My Bookmarks” and can be accessed at any time.
2.0 ALL FACULTY

This section of the manual pertains to Elentra users who are faculty members. Faculty members may want to review section 1.0 – All Users before proceeding.

The topics discussed in this section include:

2.1 EPAs
   2.1.1 Triggering EPAs
   2.1.2 Resident Triggered EPAs
   2.1.3 Faculty Triggered EPAs
   2.1.4 Completing EPAs Saved as Draft
   2.1.5 EPA Expiry and Email Reminders
   2.1.6 Viewing Completed EPAs

2.2 Viewing Assessment Feedback from Residents
2.1 EPAS

An Entrustable Professional Activity (EPA) is a key task of a discipline that an individual can be trusted to perform without direct supervision in a given health care context, once sufficient competence has been demonstrated. Each EPA typically consists of multiple milestones.

2.1.1 Triggering EPAs

Faculty members can trigger an EPA assessment from the Elentra Dashboard, which is where you will be when you first log in. You can always return to your dashboard by clicking Dashboard in the top left of your Elentra screen.

2.1.2 Resident Triggered EPAs

When an assessor triggers an assessment, there is only one method. The assessor would trigger, complete, and submit the assessment.

However, it is important to note that when a resident triggers an assessment, there are four different options to choose from. The options for residents to trigger an EPA include emailing a blank form, complete and confirm via email, complete and confirm via PIN, and self-assessment, then blank email form.

1. **Blank form** – With the blank form method, the resident would log into Elentra and trigger the assessment with a blank form. This would then send an email notification to the assessor. The assessor would then need to log into Elentra and complete the entire form, and then submit.

2. **Complete and confirm via email** – With this method, the resident can log in and trigger the assessment. The resident can also complete the form, either in full or partially. An email notification would also be given to the assessor, who can then log into Elentra to review, edit, and/or complete the form prior to submitting.
3. **Complete and confirm via PIN** – With this method, the resident can log in and trigger the assessment. The resident can also complete the form, either in full or partially. The resident can then share the form with the assessor via a mobile device. The assessor can then review, edit and/or complete the form. The assessor would then submit the form by entering the PIN. With this method, the assessor does not need to log into Elentra.

4. **Self assessment, then blank email form** – With the self-assessment, the resident would log into Elentra and complete and submit the entire form. An email notification would then be sent to the assessor, who can then log into Elentra. From here, the assessor completes an entire form for the same task and submits the second form.

### 2.1.3 Faculty Triggered EPAs

After triggering an assessment, faculty will have to complete the EPA assessment form. Please note that for assessments sent to faculty by residents, the amount of information needed to fill in may vary. Refer to [2.1.2](#) for an explanation of the various methods.

The steps below cover how to complete an entire EPA. Depending on the trigger method, some areas may already be filled in and will just need to be reviewed:

1. Select the resident (1) for whom you wish to complete the EPA assessment. Additionally, you may then be prompted to select which program you wish to complete the EPA from. This will only be present if the resident is enrolled in more than one program. Next, select the date of the encounter (2) and the EPA (3) from the drop-down menu.
You will then be prompted to either Preview This Form (4) or Begin Assessment (5). The time shown in the top right corner (6) indicates the average time taken to complete this assessment form.

**Assessment Tools**

1. Select Resident: Abe Curry
2. Select Date of Encounter: 2020-10-26
3. Select an EPA: D1: Performing histories and physical exams, documenting and presenting
4. Preview This Form
5. Begin Assessment
6. Search Assessment Tools

2. Once you begin the assessment, you will be prompted to fill out and complete the EPA. The below screens show what this looks like. One important note is that you can download this form as a PDF (7) or forward the task to another assessor to complete (8).

**Surgical Foundations: Transition to Discipline EPA #1**

7. Download PDF
8. Forward Task

Once you have submitted this assessment, the result will appear on the target's dashboard.

Assessor: Fredrick Keller, Faculty • Postgraduate Medical Education
User: user7029@example.org

Target: Abe Moore, Student • Postgraduate Medical Education
User: user4076@example.org

Task delivered on 2020-10-26
3. You can either Save as Draft, or Submit the EPA (9). If you choose to save as a draft, you will receive an email notification after 48 hours to remind you that you have an EPA in drafts to finish.
2.1.4 Completing EPAs Saved as Draft

1. If you save the EPA as a draft, you can find it later in two different ways (10). On your dashboard, you will see a section indicating you have an assessment in progress. You can also see this task by clicking the notification in the top right corner.
2. Clicking on either of these options will take you to the following screen. Here you will see a list of your outstanding assessments. If you have multiple assessments, you can also use the search functions to narrow down your results. For each task you also have the option to View Task or Remove Task. Clicking View Task will allow you to continue filling out the form.

You can download assessments as PDF by selecting the corresponding box in the given assessment, and then selecting this Download PDF(s) button. Alternatively, you can click Select All to choose all assessments to be downloaded.

This section shows key dates such as delivery, encounter, etc.

This section is related to the assessment’s target. This will show assessments for targets in progress, or completed if there are multiple targets. You can also hover over the Progress icon to reveal the target name. Blue circles indicate in-progress assessments. Note: Target refers to the individual being assessed.

Select to download as PDF. Then click the button in the top right.

2.1.5 EPA Expiry and Email Reminders

Incomplete EPA assessments will automatically expire 30 days after the initial trigger date. This timeframe will be revisited often to determine an optimal balance between the quality and prioritization of EPA completion with adapting to our new CBME culture.

An email reminder will be sent to the assessor 7 days after the assessment has been triggered if it has not yet been completed.

Once an EPA assessment expires, an email will then be sent to the resident to inform him/her of the expiry.
2.1.6 Viewing Completed EPAs

1. To view completed EPAs, click on the Assessment & Evaluation icon (1) in the top right corner. Next select My Completed Tasks (2). You will then see a list of your completed tasks. To narrow down, you can use the filters (3). To view the task, click View Task (4).

You can download assessments as PDF by selecting the corresponding box in the given assessment, and then selecting this Download PDF(s) button. Alternatively, you can click Select All to choose all assessments to be downloaded.

This section shows key dates such as delivery, encounter, etc.

This section is related to the assessment’s target. You can also hover over the Progress icon to reveal the target name. Green circles indicate completed assessments. Note: Target refers to the individual being assessed.

Select to download as PDF. Then click the button in the top right.
Residents are able to provide feedback on completed assessments by providing a “thumbs up” and an optional comment. This feedback lets faculty know whether or not their feedback has been helpful.

To view resident feedback:

1. Click the Assessment & Evaluation icon in the top right corner. Select the My Feedback tab. You will then see a list of feedback. To view in more detail, select View Details.
3.0 ACADEMIC ADVISORS

This section of the manual pertains to all Elentra users who are Academic Advisors (AA), or those looking to set up AAs, such as Program Administrators (PAs) or Program Directors (PDs). Those who are AAs and faculty members may wish to review sections 1.0 – All Users, and 2.0 – Faculty before proceeding.

The topics discussed in this section include:

3.1 How to Obtain AA Access
3.2 Creating AA Groups
3.3 Access to Dashboards of AA Learners
   3.3.1 Pinning an Assessment
3.1 HOW TO OBTAIN AA ACCESS

Those with PA or PD access are able to create AA groups. Anyone with a faculty Elentra account is able to be granted this access. PAs/PDs are able to set up these groups by following the instructions in section 3.2 of this guide. If support is required for this set-up, please contact elentra.support@schulich.uwo.ca.

If you are an AA already, you can proceed to section 3.3 of this guide.

3.2 CREATING AA GROUPS

Setting up AA groups can be done by the following steps. Please note that only PAs or PDs have access to do so.

1. Go to Admin, Manage Courses. Select the course you wish to add the AA group to.

2. Under the Groups tab, select Add New Groups. It is important to ensure you are in the correct academic period before proceeding.
3. Enter a Group Name Prefix (4). Fill in the blank under Group Type (5) with Create 1 empty groups*. Each group will pertain to an individual AA. Example group name: Advisor [NAME OF AA]. Click Add (6).

*Note: You can also create multiple groups at once. If you need support with this, please contact Elentra Support.

4. Once the group is added successfully, click on the newly created group. Add the AA under Tutor (7), and the corresponding residents under Select Members (8). Once added, click Proceed (9) to save.
3.3 ACCESS TO DASHBOARD OF AA’S LEARNERS

Once AAs have been set up with access, they are able to access the CBME Dashboard of their assigned learners by following these steps.

1. Access through the Assessment & Evaluation icon (1) in the top right corner, then click My Learners (2). Here you can search for the resident you wish to look at. You may need to adjust to the corresponding curriculum period or program (3).

2. After navigating to the My Learners area of Elentra, click on the ellipsis of the learner you wish to view the CBME Dashboard of, and select CBME Dashboard (4).
3. You will then be taken to the resident’s CBME Dashboard where you can view completed assessments. View further assessment details by clicking on the drop-down menu (5).

<table>
<thead>
<tr>
<th>Stages</th>
<th>Assessments</th>
<th>Assessments Items</th>
<th>Trends</th>
<th>Comments</th>
<th>Reshuf</th>
<th>Schedule</th>
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</thead>
<tbody>
<tr>
<td><strong>CBME Dashboard</strong></td>
<td></td>
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</table>

Anatomical Pathology

<table>
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<tr>
<th>Graham, Hubert</th>
<th>1234567890</th>
</tr>
</thead>
<tbody>
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<td><a href="mailto:user@example.org">user@example.org</a></td>
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Transition to Discipline -

<table>
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<tr>
<th>D1</th>
<th>Participating in basic specimen handling</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 Assessments</td>
<td>0 Archived Assessments</td>
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</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>D4</th>
<th>Summarizing relevant clinical information for clinicopathologic correlation</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>3 Assessments</td>
<td>0 Archived Assessments</td>
<td></td>
</tr>
</tbody>
</table>

4. You can also click on the individual assessment (6) to view further information and breakdowns.

<table>
<thead>
<tr>
<th>Stages</th>
<th>Assessments</th>
<th>Assessments Items</th>
<th>Trends</th>
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<th>D1</th>
<th>Participating in basic specimen handling</th>
<th>6</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 Assessments</td>
<td>0 Archived Assessments</td>
<td></td>
</tr>
</tbody>
</table>

<table>
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<tr>
<th>Current Assessments</th>
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<td><strong>Anatomical Pathology</strong>: Transition to Discipline EPA</td>
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</tr>
<tr>
<td>Archived Assessments</td>
<td>6 Assessments</td>
<td>0 Archived Assessments</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

Last updated: 2021-04-07
3.3.1 Pinning an Assessment

AAs can also pin a Learner’s assessment, items or comments so that assessments can be found more easily in the future. To do this, first follow the steps in 3.3 of this guide, then:

1. Click on the Assessments, Assessment Items or Comments (1) tab on your learner’s CBME Dashboard.

2. Scroll down to the bottom of the page to view the assessment, items or comments. Beside the assessment you wish to pin, click on the pin icon (2).
3. To view pinned items, scroll back to the CBME Dashboard ribbon and select Pins (3).
4.0 COMPETENCE COMMITTEE MEMBERS

This section of the manual pertains to all Elentra users who are part of a program's Competence Committee (CC). CC members may also wish to review sections 1.0 – All Users, and 2.0 – Faculty before proceeding.

The topics discussed in this section include:

4.1 How to Obtain CC Access
4.2 Access to Dashboard of All Learners
4.3 Marking an EPA or Stage of Training Complete
4.1 HOW TO OBTAIN CC ACCESS

A program’s PA or PD can add relevant members to their Competence Committee members list on the course set up. Adding an individual to this will grant them access to see all learners in the given program’s information. Information includes access to a learner’s dashboard as well as the ability to mark an EPA or stage of training as completed. PAs can refer to section 6.1 of this guide on how to add Competence Committee members.

4.2 ACCESS TO DASHBOARD OF ALL LEARNERS

1. Access through the Assessment & Evaluation icon (1) in the top right corner, then click My Learners (2). Here you can search for the resident you wish to look at. You may need to adjust to the corresponding curriculum period or program (3).
2. After navigating to the My Learners area of Elentra, click on the ellipsis of the learner you wish to view the CBME Dashboard of, and select CBME Dashboard (4).

Assessment & Evaluation

- Assessment Tasks
- Tasks Completed on Me
- My Completed Tasks
- My Feedback
- My Learners
- AP

Anatomical Pathology

- Search Learners

Bowen, Karl
user+3194@example.org
123453194
PGY3

CBME Dashboard

Anatomical Pathology

- Graham, Robert
user+9572@example.org

Transition to Discipline

- D1: Participating in basic specimen handling
  - 3 Assessments, 0 Archived Assessments

- D2: Summarizing relevant clinical information for clinicopathologic correlation
  - 1 Assessment, 0 Archived Assessments

3. You will then be taken to the resident’s CBME Dashboard where you can view completed assessments. View further assessment details by clicking on the drop-down menu (5).
4. You can also click on the individual assessment (6) to view further information and breakdowns.

CBME Dashboard

Anatomical Pathology

Graham, Hubert
user-0537@example.org

Stages Assessments Assessments Items Trends Comments Pass Schedule

Transition to Discipline

D1 Participating in basic specimen handling
0 Assessments 0 Archived Assessments

D2 Summarizing relevant clinical information for clinicopathologic correlation
0 Assessments 0 Archived Assessments

4.3 MARKING AN EPA OR STAGE OF TRAINING COMPLETE

To mark an EPA or stage of training on a given resident complete, users must first follow all steps in section 4.2 of this guide. Following these steps, an EPA or training stage can be marked by:

1. Clicking on the circle (1) of the corresponding EPA or stage of training you wish to indicate as complete.
2. You can then enter an optional reasoning (2) and click Confirm (3).

3. If you wish to uncheck an EPA or stage of training, you can do so in the same method by clicking on the checkmark (4).

4. You will then be asked to enter a mandatory reason (5) then select Confirm (6).
This section of the manual pertains to Elentra users who are Program Directors (PDs). PDs may also wish to review sections 1.0 – All Users, 2.0 – Faculty, 3.0 – Academic Advisors, and 4.0 – Competence Committee Members before proceeding.

If CBME Leads wish to obtain access to any of the topics in this section please reach out to elentra.support@schulich.uwo.ca.

The topics discussed in this section include:

5.1 EPA Assessments
   5.1.1 Triggering Assessments on Behalf of Others
   5.1.2 Triggering Assessments to External Assessors
   5.1.3 Reviewing Outstanding, Deleted, and Expired EPAs
   5.1.4 Sending EPA Reminders and Deleting EPA Tasks
   5.1.5 Concern Flags and Emails

5.2 Accessing My Faculty Tab
5.1 EPA ASSESSMENTS

5.1.1 Triggering Assessments on Behalf of Others

An assessment can be triggered for any program’s resident and assessor by both Program Directors and/or Program Administrators.

1. Click on Admin (1) then Assessment & Evaluation (2). Click on Trigger Assessment (3).

2. You will then be prompted to select the corresponding information (4) including Resident (Note: you can either use the search bar or filter by curriculum period), Assessor, Date of Encounter and EPA. The form type should be CBME. You can then either Preview This Form (5) or Send Assessment (6).
5.1.2 Triggering Assessments to External Assessors

To trigger to an external assessor, the steps are similar to those in 5.1.1, however an extra step is required when selecting the assessor.

1. Click on Admin (1) then Assessment & Evaluation (2). Click on Trigger Assessment (3).

2. You will then be prompted to select the corresponding information (4) including Resident, Date of Encounter, and EPA. The form type should be CBME.
3. To add an external assessor, first try searching for their first name, last name, or email in the assessor search bar to ensure that an account has not already been created for them and to avoid duplicates. In the case that two options are listed for an assessor, **please use the one with UWO email** and notify elentra.support@schulich.uwo.ca to remove the duplicate. If the user you are looking for is not there, you can add them by clicking the External Assessor (5).

**Assessment Tools**

Before you add an external assessor to the system, please make sure that you have searched for your assessor by correct spelling to reduce the possibility of creating a duplicate account.

![Assessment Tools](image)

4. Enter the external assessor’s first name, last name and email, then click Add Assessor (6). Click Send Assessment (7). The external assessor will then be emailed a link where they can complete the EPA assessment.
5.1.3 Reviewing Outstanding, Deleted, and Expired EPAs

PDs are able to review any outstanding, deleted, or expired EPAs within their program. This can be done by:

1. Click on Admin (1) then Assessment & Evaluation (2). You can then use the various filters (3) to sort the EPAs by outstanding, deleted, completed, prompted responses, or expired. Additionally, you can filter further by using the search bar and delivery type filters (4).

5.1.4 Sending EPA Reminders and Deleting EPA Tasks

PDs also have the option to send EPA reminders or delete EPA tasks. Sending an EPA reminder will then notify the assessor via email with information on which EPA assessment remains outstanding.

1. Click on Admin (1) then Assessment & Evaluation (2). You can then use the various filters to narrow your search. Note: These filters are explained above in 5.1.3 of this guide.
2. To send a reminder, select the corresponding EPA notification box (3) (bell icon). You can select multiple EPAs at once. Once selected, click Send Reminders (4).

3. A popup will then appear for your review. SelectConfirm Reminders (5) to proceed.
4. Deleting EPA assessments is done in a similar manner. To delete an EPA, select the corresponding EPA notification box (6) (trash bin icon). You can select multiple EPAs at once. Once selected, click Delete Task(s) (7).

5. You will then be asked to select a reason as to why the task is being deleted (8). Check off the corresponding box and provide a comment if specified as other. Click Remove Task(s) (9) to proceed.
5.1.5 Concern Flags and Emails

Within your program's EPA Assessments, the forms have an option for any concern flags such as professionalism issues, etc. An example of what this looks like is shown in the photo below.

<table>
<thead>
<tr>
<th>Concerns</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do you have patient safety concerns related to this resident's performance?</td>
</tr>
<tr>
<td>No</td>
</tr>
<tr>
<td>Do you have professionalism concerns about this resident's performance?</td>
</tr>
<tr>
<td>No</td>
</tr>
<tr>
<td>Are there other reasons to flag this assessment?</td>
</tr>
<tr>
<td>No</td>
</tr>
<tr>
<td>Yes</td>
</tr>
</tbody>
</table>

If a concern flag is selected on an EPA Assessment, PDs and PAs will receive an email notification indicating that a concern flag has been raised. Residents are not notified of these concerns.
PDs have the ability to access their program’s faculty’s assessments including any that are outstanding or completed.

1. Click on the Assessment & Evaluation icon in the top right corner (1). Select the Faculty (2) tab. You can then search for the faculty member you wish to look at (3). Click View assessment tasks (4).
2. You can then use the various tabs and search bars to see the faculty member’s outstanding and completed tasks (5). To save an assessment as a PDF, check off the assessment(s) you wish you save (6) then select Download PDF(s) (7).
This section of the manual pertains to Elentra users who are Program Administrators (PAs). PAs may also wish to review sections 1.0 – All Users, 3.0 – Academic Advisors, and 4.0 – Competence Committee Members before proceeding.

The topics discussed in this section include:

6.1 Course Setup

6.2 EPA Assessments
   6.2.1 Triggering Assessments on Behalf of Others
   6.2.2 Triggering Assessments to External Assessors
   6.2.3 Reviewing Outstanding, Deleted, and Expired EPAs
   6.2.4 Sending EPA Reminders and Deleting EPA Tasks
   6.2.5 Concern Flags and Emails

6.3 Accessing My Learners Tab
   6.3.1 CBME Dashboard
   6.3.2 My Learner Assessments

6.4 Accessing My Faculty Tab
6.1 COURSE SETUP

The course setup is where you can view and adjust the associated faculty of your program. Here is also where you can update members of your program’s Competence Committee.

1. To view your course setup, click on Admin (1) then Manage Courses (2) and select your course from the list.

2. You will then be taken to the course setup page. Scroll down to Program Contacts to see a list of course members including the PD, PAs, Associated Faculty and Competence Committee members. It is important to keep this list up to date at all times to ensure members of your program have the access they need.

To add a member, simply start typing their name in the search field and click on their name once it appears (3).
3. To remove a member, simply click on the X beside their name (4).

4. After making any changes, click Save (5) at the bottom right of the page.
6.2 EPA ASSESSMENTS

6.2.1 Triggering Assessments on Behalf of Others

An assessment can be triggered for any program’s resident and assessor by both Program Directors and/or Program Administrators.

1. Click on Admin (1) then Assessment & Evaluation (2). Click on Trigger Assessment (3).

2. You will then be prompted to select the corresponding information (4) including Resident, Assessor, Date of Encounter and EPA. The form type should be CBME. You can then either Preview This Form (5) or Send Assessment (6).
6.2.2 Triggering Assessments to External Assessors

To trigger to an external assessor, the steps are similar to those in 6.2.1, however an extra step is required when selecting the assessor.

1. Click on Admin (1) then Assessment & Evaluation (2). Click on Trigger Assessment (3).

2. You will then be prompted to select the corresponding information (4) including Resident, Date of Encounter, and EPA. The form type should be CBME.
3. To add an external assessor, first try searching for their first name, last name, or email in the assessor search bar to ensure that an account has not already been created for them and to avoid duplicates. In the case that two options are listed for an assessor, please use the one with UWO email and notify elentra.support@schulich.uwo.ca to remove the duplicate. If the user you are looking for is not there, you can add them by clicking the External Assessor (5).

4. Enter the external assessor’s first name, last name and email, then click Add Assessor (6). Click Send Assessment (7). The external assessor will then be emailed a link where they can complete the EPA assessment.
6.2.3 Reviewing Outstanding, Deleted, and Expired EPAs

PAs are able to review any outstanding, deleted, or expired EPAs within their program. This can be done by:

1. Click on Admin (1) then Assessment & Evaluation (2). You can then use the various filters (3) to sort the EPAs by outstanding, deleted, completed, prompted responses, or expired. Additionally, you can also use filter further by using the search bar and delivery type filters (4).

6.2.4 Sending EPA Reminders and Deleting EPA Tasks

PAs also have the option to send EPA reminders or delete EPA tasks. Sending an EPA reminder will then notify the assessor via email with information on which EPA assessment they still have outstanding.

1. Click on Admin (1) then Assessment & Evaluation (2). You can then use the various filters to narrow your search. Note: These filters are explained above in 6.2.3 of this guide.
2. To send a reminder, select the corresponding EPA notification box (3) (bell icon). You can select multiple EPAs at once. Once selected, click Send Reminders (4).

3. A popup will then appear for your review. Select Confirm Reminders (5) to proceed.
4. Deleting EPA assessments is done in a similar manner. To delete an EPA, select the corresponding EPA notification box (6) (trash bin icon). You can select multiple EPAs at once. Once selected, click Delete Task(s) (7).

5. You will then be asked to select a reason why the task is being deleted (8). Check off the corresponding box and provide a comment if specified as other. Click Remove Task(s) (9) to proceed.
6.2.5 Concern Flags and Emails

Within your program's EPA Assessments, the forms have an option for any concern flags such as professionalism issues, etc. An example of what this looks like is shown in the photo below.

If a concern flag is selected on an EPA Assessment, PDs and PAs will receive an email notification indicating that a concern flag has been raised. Residents are not informed of these concern flags.
PAs are able to view their residents’ Assessments and CBME Dashboard. This only pertains to Learners who faculty have completed assessments on. You can see the assessments you have completed on Learners by the following steps:

1. Access through the Assessment & Evaluation icon (1) in the top right corner, then click My Learners (2). Here you can search for the resident you wish to look at. You may need to adjust to the corresponding curriculum period or program (3) – (this feature will only be available to those with multiple program/curriculum period access). Clicking on the ellipsis (4) will then open further options – CBME Dashboard or Assessments.
6.3.1 CBME Dashboard

1. After navigating to the My Learners area of Elentra, click on the ellipsis of the learner you wish to view the CBME Dashboard of, and select CBME Dashboard (1).

Assessment & Evaluation

| Assessment Tasks | Tasks Completed on Me | My Completed Tasks | My Feedback | My Learners | AP |

Anatomical Pathology

Search Learners

2. You will then be taken to the resident’s CBME Dashboard where you can view completed assessments. View further assessment details by clicking on the drop-down menu (2).
3. You can also click on the individual assessment (3) to view further information and breakdowns.

CBME Dashboard

6.3.2 My Learner Assessments

1. After navigating to the My Learners area of Elentra, click on the ellipsis of the learner you wish to view the CBME Dashboard of, and select Assessments (1).
2. You can then search for a specific assessment using the search bar and filters (2), or view completed, pending, upcoming, etc. tasks of the learner (3). To view more details on the task, click View Task (4).
PAs have the ability to access their program’s faculty’s assessments including any that are outstanding or completed.

1. Click on the Assessment & Evaluation icon in the top right corner (1). Select the Faculty (2) tab. You can then search for the specific faculty member you are looking for (3). Click View assessment tasks (4).
2. You can then use the various tabs and search bars to see the faculty member’s outstanding and completed tasks (5). To save an assessment as a PDF, check off the assessment(s) you wish you save (6) then select Download PDF(s) (7).
This section of the manual pertains to Elentra users who are residents. Residents may also wish to review section 1.0 – All Users before proceeding.

The topics discussed in this section include:

7.1 EPAS as a Target
   7.1.1 Triggering EPAs
   7.1.2 Completing EPAs
   7.1.3 EPA Expiry and Email Reminders
   7.1.4 Viewing Tasks Completed on Me
   7.1.5 Viewing My Triggered Tasks and Sending Reminders

7.2 EPAs as an Assessor
   7.2.1 Triggering and Completing EPAs
   7.2.2 Viewing My Completed Tasks

7.3 Managing CBME Dashboard
   7.3.1 Multiple Programs
   7.3.2 Stages
   7.3.3 Assessments and Providing Faculty Feedback
   7.3.4 Assessment Items, Trends and Comments
   7.3.5 Pins
7.1 EPAS AS A TARGET

Completing EPAs as a target refers to EPAs where you are the one being assessed. If you wish to complete an EPA as an assessor, please proceed to section 7.2.

7.1.1 Triggering EPAs

Residents can trigger an EPA assessment from the Elentra Dashboard, which is the first screen shown after logging in. You can always return to your CBME Dashboard by clicking Dashboard in the top left of your Elentra screen.
1. When being assessed, ensure that I am the target (1) is selected. Under Select Assessor (2), use the search bar to search for the assessor you are looking for. If your assessor is external and does not have a UWO account, you should first still use the search bar to verify this. This will help ensure duplicate names for the same assessor are not created in Elentra. If they are not listed, you can then add them as an External Assessor (3).

   ![Assessment Tools](image)

   a. If you are adding an External Assessor, you will then have to enter their First Name, Last Name, and Email Address and click Add Assessor (4). It is important to first check to make sure that your external assessor isn't already available in the Assessor options before adding a new one. In the case that two options are listed for an assessor, please use the one with UWO email and notify elentra.support@schulich.uwo.ca to remove the duplicate.
2. If you are in multiple residency programs, use the dropdown menu in the Select Program field to choose the program you are completing the EPA for. Note: this will only be required if you are enrolled in more than one program, e.g., Neurosurgery and Surgical Foundations.

When triggering an assessment, there are four different options to choose from (6). These options include emailing from a blank form, complete and confirm via email, complete and confirm via PIN, and self assessment, then blank email form.

- **Blank form** – This would then send an email notification to the assessor. The assessor would then need to log into Elentra and complete the entire form, and then submit.

- **Complete and confirm via email** – With this method you can fill out the form, either in full or partially. An email notification would also be given to the assessor, who can then log into Elentra to review, edit, and/or complete the form prior to submitting.

- **Complete and confirm via PIN** – With this method you can fill out the form, either in full or partially. The assessor can then review, edit and/or complete the form. The assessor would then submit the form by entering the PIN. With this method, the assessor does not need to log into Elentra. Note: this method will only be available to assessors set up a PIN.

- **Self assessment, then email blank form** – With the self assessment, you are able to complete and submit the entire form. An email notification would then be sent to the assessor, who can then log into Elentra. From here, the assessor completes an entire form separately, and submits the second form.

Next, select the Date of Encounter (7) and the corresponding EPA you wish to have completed (8).
Assessment Tools

Select Assessor: Aaron Burns
Select Program: Internal Medicine

Select assessment method:
- Email blank form: The assessor will receive an email notification to complete an assessment based on the selected tool.
- Complete and confirm via email:
  Complete an assessment using the selected tool. Upon completion, the assessor will receive an email notification asking them to review/edit and confirm the assessment.
- Complete and confirm via PIN:
  The selected assessor has not set their PIN.
- Self-assessment, then email blank form:
  Complete an assessment based on the selected tool. Upon completion, the assessor will receive a blank assessment task with the same assessment tool.

Select Date of Encounter: 2021-01-21

Select an EPA: D2: Identifying and assessing unstable patients, providing initial management, and obtaining help
3. You will then have the option to either Preview the Form (9) or Send Assessment/Begin Assessment, depending on the assessment method chosen (10).

4. If you chose email a blank form as your assessment method, you will then be prompted with an optional Assessment Cue. The purpose of this is to remind assessors of the assessment they are to complete. It is important NOT to include any patient information in this area.
7.1.2 Completing EPAs

If you chose to complete and confirm via email, complete and confirm via PIN, or self assessment as your assessment method, you will then be prompted to complete the EPA (see section 7.1.1).

You should be given instructions by your program or by the individual assessor as to how much of the form you are allowed to complete. If you are unsure, ask your assessor or PD.

1. Once you begin the assessment, you will be prompted to fill out and complete the EPA. The below screens show what this looks like. One important note is that you can download this form as a PDF (1)

   Surgical Foundations: Transition to Discipline EPA#1

   Once you have submitted this assessment, the result will appear on the target's dashboard.

   Assessor: Frederick Keeler
   Faculty: Postgraduate Medical Education
   user: 2029@example.org

   Target: Abe Moore
   Student: Postgraduate Medical Education
   user: 5478@example.org

   Task delivered on 2020-10-26

   Surgical Foundations: Transition to Discipline EPA #1
   Performing the preoperative preparation of patients for basic surgical procedures
   
   Assessment Plan
   
   Indirect observation by supervisor
   
   Basis of Assessment
   
   Assessor’s Role

(1) Refer to the actual form for specific details and instructions.
2. You can then either Save as Draft, or Submit the EPA (2). If you choose to save as a draft, you will receive an email notification after 48 hours to remind you that you have an EPA in drafts to finish.

3. If you save the EPA as a draft, you can find it later in two different ways (3). The first being on your dashboard, you will see a screen indicating you have an assessment in progress. Secondly, you can also see this task by clicking the notification in the top right corner.
4. Clicking on either of these options will take you to the following screen. Here you will see a list of your outstanding assessments. If you have multiple assessments, you can also use the search functions to narrow down your results (4). On each task you also have the option to View Task or Remove Task (5). Clicking View Task will allow you to continue filling out the form.

You can download assessments as PDF by selecting the corresponding box in the given assessment, and then selecting this Download PDF(s) button. Alternatively, you can click Select All to choose all assessments to be downloaded.

This section shows key dates such as delivery, encounter, etc.

This section is related to the assessment's target. This will show assessments for targets in progress, or completed if there are multiple targets. You can also hover over the Progress icon to reveal the target name. Blue circles indicate in-progress assessments.

Select to download as PDF. Then click the button in the top right.

7.1.3 EPA Expiries and Reminder Emails

Incomplete EPA assessments will automatically expire 30 days after the initial trigger date. This timeframe will be revisited often to determine an optimal balance between the quality and prioritization of EPA completion with adapting to our new CBME culture.

An email reminder will be sent to the assessor 7 days after the assessment has been triggered if it has not yet been completed.

Once an EPA assessment expires, an email will then be sent to the resident to inform him/her of the expiry.
7.1.4 Viewing Tasks Completed on Me

1. To view completed EPAs, click on the Assessment & Evaluation icon (1) in the top right corner. Next select Tasks Completed on Me (2). You will then see a list of your completed tasks. To narrow down, you can use the filters (3). To view the task, click View Task (4).

You can download assessments as PDF by selecting the corresponding box in the given assessment, and then selecting this Download PDF(s) button. Alternatively, you can click Select All to choose all assessments to be downloaded.

Select to download as PDF. Then click the button in the top right.

This section shows key dates such as delivery, encounter, etc.
7.1.5 Viewing My Triggered Tasks and Sending Reminders

Residents are able to view the status of their triggered assessments and send assessors email reminders regarding outstanding assessments by:

1. Click on the Assessment & Evaluation (1) icon in the top right corner, then My Triggered Tasks (2). You will then see a list of tasks you have triggered and their status (e.g., not started, auto-expired, deleted, etc.) along with the dates of any previous notifications sent.

2. For assessments that haven't been started or are in-progress, you are able to send the assessor an email notification. To do so, click on the check box (3) of the assessment you wish to send a reminder for then click Send Reminders (4). Note – there is a limit of one email notification per assessment per day. If an email notification has already been sent for that assessment, the check box will be greyed out with a notice that the notification has already been sent today.
7.2 EPAS AS AN ASSESSOR

7.2.1 Triggering and Completing EPAs

Residents can trigger an EPA assessment from the Elentra Dashboard, which is where you will be when you first log in. You can always return to your CBME Dashboard by clicking Dashboard in the top left of your Elentra screen.

1. Select I am the assessor (1).

Assessment Tools

Select Resident: Click here to select a resident
Select Date of Encounter
2. Select the learner (2) you wish to assess. Additionally, you may then be prompted to select which program you wish to complete the EPA from. This will only be present if the learner is enrolled in more than one program. Next, select the date of the encounter (3) and the EPA (4) from the drop-down menu.

You will then be prompted to either Preview This Form (5) or Begin Assessment (6). The time shown in the top right corner (7) indicates the average time taken to complete this assessment form.

3. Once you begin the assessment, you will be prompted to fill out and complete the EPA. The below screens show what this looks like. One important note is that you can download this form as a PDF (8).
Surgical Foundations: Transition to Discipline EPA #1
Performing the preoperative preparation of patients for basic surgical procedures

**Key Features:**
- This EPA includes verifying pertinent clinical findings and completing relevant clinical documentation, including orders
- Indirect observation by supervisor

**Assessment Plan:**

**Basis of Assessment**

- Please Select

**Assessor's Role**

- Please Select

4. You can then either Save as Draft, or Submit the EPA (9). If you choose to save as a draft, you will receive an email notification after 48 hours to remind you that you have an EPA in drafts to finish.

- **Do you have professionalism concerns about this resident's performance?**
  - No
  - Yes

- **Are there other reasons to flag this assessment?**
  - No

- **Have feedback about this form? (e.g. "Missing Dx", etc.)**
  - No
  - Yes

[Save as Draft] or [Submit]
5. If you save the EPA as a draft, you can find it later in two different ways (10). The first being on your dashboard, you will see a screen indicating you have an assessment in progress. Secondly, you can also see this task by clicking the notification in the top right corner.
6. Clicking on either of these options will take you to the following screen. Here you will see a list of your outstanding assessments. If you have multiple assessments, you can also use the search functions to narrow down your results (11). On each task you also have the option to View Task or Remove Task (12). Clicking View Task will allow you to continue filling out the form.

You can download assessments as PDF by selecting the corresponding box in the given assessment, and then selecting this Download PDF(s) button. Alternatively, you can click Select All to choose all assessments to be downloaded.

Assessment Tasks

This section shows key dates such as delivery, encounter, etc.

This section is related to the assessment's target. This will show assessments for targets in progress, or completed if there are multiple targets. You can also hover over the Progress icon to reveal the target name. Blue circles indicate in-progress assessments.

Select to download as PDF. Then click the button in the top-right.
7.2.2 Viewing My Completed Tasks

1. To view completed EPAs, click on the Assessment & Evaluation icon (1) in the top right corner. Next select My Completed Tasks (2). You will then see a list of your completed tasks. To narrow down, you can use the filters (3). To view the task, click View Task (4).

You can download assessments as PDF by selecting the corresponding box in the given assessment, and then selecting this Download PDF(s) button. Alternatively, you can click Select All to choose all assessments to be downloaded.

This section shows key dates such as delivery, encounter, etc.

This section is related to the assessment’s target. You can also hover over the Progress icon to reveal the target name. Green circles indicate completed assessments.

Select to download as PDF. Then click the button in the top right.
Residents are able to view their progress at any time by viewing his/her CBME Dashboard. The Dashboard can be accessed from any page within Elentra, simply by clicking on the Dashboard tab in the main ribbon.

7.3.1 Multiple Programs

1. For residents who are in multiple programs, there will be a toggle (1) at the top of the CBME Dashboard where you can switch between programs for any aspect of the CBME Dashboard.
### 7.3.2 Stages

1. Under the Stages (1) tab of the CBME Dashboard, you will see an overview of your CBME stages. Green checkmarks (2) indicate completed EPAs and/or stages of training. Clicking on an EPA's arrow (3) will open the accordion to reveal further information. Clicking on a given EPA (4) will then take you to a new page with further details.
7.3.3 Assessments and Providing Faculty Feedback

1. Under the Assessments (1) tab of the CBME Dashboard, you are able to filter (2) completed, in-progress, pending, and deleted EPAs if needed.

   CBME Dashboard

   SURG-F: Surgical Foundations

   Filter Options (1) → Select Assessments (2) → Select Rotation

   Date Filters

   ◼ Date Range
   ◼ Rotation

   Curriculum Tag Filters

   EPAs (Select EPAs) → CanMEDS Roles (Select CanMEDS Roles) → Milestones (Select Milestones)

2. Otherwise, you can simply scroll to the bottom of the page to see the various EPAs you have completed, or are pending, in progress, or deleted by clicking on the corresponding tabs (3).

   Assessor Feedback – to provide assessors with feedback, simply click on the thumb’s up icon (4) beside the EPA you wish to provide the feedback on. You can then add a comment prior to submitting. The purpose of this is to let your assessors know if their narrative comments were helpful to your learning or not.
**Pinning Assessments** – to pin an assessment, you can simply click on the thumbtack icon (5). This will store your saved assessments in the Pin section of the CBME Dashboard, as explained in section 7.3.5.

![Completed Assessments](image)

7.3.4 **Assessment Items, Trends, and Comments**

1. Residents can also view their CBME Dashboard by further breakdowns such as Assessment Items, Trends, and Comments (1). These tabs work in the same way as presented in 7.3.3.
7.3.5 Pins

1. Items which you have pinned (as outlined in sections 7.3.3 and 7.3.4) can easily be accessed under the Pins tab (1) of the CBME Dashboard.

2. Items which can be pinned include assessments, items and comments (2).

Completed Assessments
This section of the manual pertains to the reports portal. The reports portal is a separate system, but can be accessed via Elentra.

The topics covered in this section include:

8.1 Elentra Access Policy
8.2 Who Has Access?
8.3 Accessing the Reports Portal
8.4 Available Reports
  8.4.1 Assessor Statistics Reports
  8.4.2 Raw EPA Data
  8.4.3 Resident EPA Summary & Resident EPA Details
  8.4.4 Resident Milestone Summary
It is important that all users using the Reports portal is reminded to destroy any files in which they download. It is all Elentra users’ responsibility to do so, as well as ensuring to log out of your browser after using.

All downloaded files from the Reports portal shows the date, time, and name of the user at the bottom of the page.

More information on the Elentra Access Policy can be found here.

8.2 WHO HAS ACCESS?

The reports portal has a variety of different reports available, including Assessor Statistics Reports, Raw EPA Data, Resident EPA Summary, Resident EPA Details, and Resident Milestone Summary. The table below shows a breakdown of which roles have access to which reports, and what information is available to them within these reports.

<table>
<thead>
<tr>
<th>Report</th>
<th>Available User Groups</th>
<th>How to Obtain Access</th>
<th>Data Available</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assessor Statistics Report</td>
<td>Faculty &amp; Residents</td>
<td>Automatic</td>
<td>Faculty and residents are able to see their own assessor statistics data. Residents will see their data for when they are acting as an assessor.</td>
</tr>
<tr>
<td></td>
<td>PAs &amp; PDs*</td>
<td>PAs &amp; PDs should have access during course set up, but if not please contact Elentra Support.</td>
<td>PAs and PDs can see assessor statistic data for faculty within their program.</td>
</tr>
<tr>
<td></td>
<td>*If CBME Leads wish to obtain access to this please contact Elentra Support.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Raw EPA Data</td>
<td>Residents</td>
<td>Automatic</td>
<td>Residents are able to see Raw EPA Data for the EPAs they have completed.</td>
</tr>
<tr>
<td></td>
<td>Academic Advisors</td>
<td>Ensure you are set up as an AA, or contact Elentra Support for help.</td>
<td>AAs can see Raw EPA Data for their Learners only.</td>
</tr>
<tr>
<td>Resident EPA Summary &amp; Resident EPA Details &amp; Resident Milestone Summary</td>
<td>PAs &amp; PDs</td>
<td>PAs &amp; PDs should have access during course set up, but if not please contact Elentra Support.</td>
<td>PAs and PDs can see Raw EPA Data for the EPAs that their program’s residents have completed.</td>
</tr>
<tr>
<td>---</td>
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<td>---</td>
<td>---</td>
</tr>
<tr>
<td>Residents</td>
<td>Automatic</td>
<td>Residents are able to see their own data.</td>
<td></td>
</tr>
<tr>
<td>Academic Advisors</td>
<td>Ensure you are set up as an AA, or contact Elentra Support for help</td>
<td>AAs can see data for their Learners only.</td>
<td></td>
</tr>
<tr>
<td>PAs, PDs &amp; CC Members</td>
<td>PAs, PDs and CC Members should have access during course set up, but if not please contact Elentra Support.</td>
<td>PAs, PDs &amp; CC Members can see data for their program’s residents only.</td>
<td></td>
</tr>
</tbody>
</table>

**8.3 ACCESSING THE REPORT PORTAL**

1. To access the Assessor Statistics Report, click on the Reports (1) tab.

2. A new browser page will then open where you will be asked to enter your UWO credentials. Once logged in, click on Elentra Reports, then PGME (2).
3. You will then see the reports available to you. Simply click on the desired report to proceed (3). Note – you will not see all reports listed in the example below.

![Report Portal Screenshot]

4. Use the search filters (4) for the necessary fields needed to generate your report. Note – your filter options will vary depending on the report you select and your user role. Click View Report (5) to load. Once generated, you can then Save or Print (6) the report. The report will generate three different pages. Click on the arrows (7) to navigate between pages.

![Search Filters Screenshot]

### 8.4 Available Reports

This section of the manual describes the different reports available and the type of information you can find in each report. For instructions on how to navigate to the report portals and how to filter your results, refer to section 8.2.

#### 8.4.1 Assessor Statistics Reports

All users have access to their Assessor Statistics report; however, it may look slightly different depending on your user access. Please refer to the access chart in 8.1 for an overview of what data you can expect to see.

Residents and faculty can expect to see the following report for their own data ONLY. PAs and PDs have access to view all faculty and resident data in their programs. If users have the same role in multiple programs, they will need to choose the desired program from the filtering menu (e.g. a faculty member who has completed EPAs in Internal Medicine and Surgical Foundations can filter between the two programs).
1. The first page of the Assessor Statistics report shows various metrics including # of EPA assessments requested, # of EPA assessments completed, etc.
2. The second page shows the distribution of entrustment ratings. There is also a pie chart showing the breakdown of entrustment ratings for comparison against a program’s entire list of faculty. PAs have the ability to edit their program’s faculty list as explained in section 6.1 of this guide.
3. The third page shows the narrative comments and next steps entered into Elentra by the faculty member.

8.4.2 Raw EPA Data

The Raw EPA Data report shows all data associated with an EPA. The type of information shown is this report lists all triggered EPAs and includes: EPA title, assessor information, status of EPA, encounter date, comments, and so forth. The example below shows only a small snipped of what the Raw EPA Data report looks like due to the large amount of information.
8.4.3 Resident EPA Summary & Resident EPA Details

The Resident EPA Summary provides an overview of a user’s EPAs and stages of discipline that have been completed. An example of what this looks like can be seen below.

Users can click on Details of any EPA to view further information. Doing so will take you directly to the Resident EPA Details report. You can also access this report via the Report Portal. A snippet of this report can be seen below.
RESIDENT NAME

Obstetrics & Gynecology
D1
From: July 1, 2019 To: February 9, 2021

Obstetrics & Gynecology: Transition to Discipline EPA #1
Performing initial assessments for uncomplicated obstetric patients

Key Features:
- This EPA includes assessment, documentation, and case presentation, including a basic differential diagnosis and initial investigation of uncomplicated obstetric patients.
- This EPA must be observed in a clinical setting.

Assessment Plan:
Collect 3 observations of achievement
- At least 1 antepartum patient
- At least 1 intrapartum patient
- At least 2 observations by faculty
- At least 3 different observers

Assessments

<table>
<thead>
<tr>
<th></th>
<th>Faculty Assessors</th>
<th>Resident Assessors</th>
<th>All Assessors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unique Assessors (Scores 4+)</td>
<td>3</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>Complete (Scores 4+)</td>
<td>3</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>Complete (Any Score)</td>
<td>4</td>
<td>1</td>
<td>5</td>
</tr>
<tr>
<td>Requested Assessments</td>
<td>4</td>
<td>1</td>
<td>5</td>
</tr>
</tbody>
</table>

Entrustment Scores

Score | Total Complete
---    |---------
5      | 2
4      | 2
3      | 1
2      | 0
1      | 0

Encountered Aug 13, 2019 to Sep 12, 2019

Created: February 9, 2021 3:12 PM by
8.4.4 Resident Milestone Summary

The Resident Milestone Summary gives an overview of a resident's milestones for the corresponding EPAs. An example of what this looks like can be seen below.