ELENTRA USER GUIDE FOR PGME

The purpose of this guide is to provide detailed information and instructions on the use of Eletona 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.
## Elentra User Guide Updates

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<tr>
<th>Date</th>
<th>Version Number</th>
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<tr>
<td>August 27, 2021</td>
<td>Version 1.1</td>
<td>• Addition of <a href="#">1.7 EPA Encyclopedia</a> (All Users)</td>
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<td>• Addition of <a href="#">2.1.7 Declining EPAs</a> (All Faculty)</td>
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<td>• Update to <a href="#">2.3 Narrative Notes</a> (All Faculty)</td>
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<td>• Update to section <a href="#">5.1.5 Concern Flags and Form Feedback</a> (Program Directors)</td>
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<td>• Update to <a href="#">7.3 Managing CBME Progress</a> (Residents)</td>
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<td>• Update to <a href="#">7.4 Narrative Notes</a> (Residents)</td>
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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
   1.3.3 Saving as a Shortcut on Android Devices
1.4 Logging into Elentra
   1.4.1 Elentra Credentials
   1.4.2 Main Page Information
1.5 Profile Features – Set PIN, Secondary Email, etc.
   1.5.1 Setting PIN
   1.5.2 Secondary Email
1.6 Bookmarks
1.7 EPA Encyclopedia
## 1.1 Support Contacts

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<thead>
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<th>Contact</th>
<th>Email</th>
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<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>
<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>
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<td>Website <a href="#">link</a></td>
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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/.

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/.

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?

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.
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.

1. **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.

2. **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.

3. **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.

1.7 EPA ENCYCLOPEDIA

Users have access to the EPA Encyclopedia of their program(s). The EPA Encyclopedia can be accessed from the main Dashboard under Helpful Links in the left side menu.
This will then take you to the EPA Encyclopedia of your program(s) where you can search for EPAs (1), view detailed descriptions (2) as well as the EPA Program map (3). If you have multiple programs, with updated CBME versions you can use the drop box (4) to toggle to the corresponding information.
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
   2.1.7 Declining EPAs

2.2 Viewing Assessment Feedback from Residents

2.3 Narratives
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 present...
4. Preview This Form
5. Begin Assessment
6. Internal Medicine: Transition to Discipline EPA#1 Supervisor Form
   3 assessments completed on this learner.

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
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 (2). For each task you also have the option to View Task or Remove Task (3). 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).

2.1.7 Declining EPAs

You may receive an EPA initiated by a resident that you wish to decline for various reasons. Common reasons are listed below:

- **Duplication** – An EPA for the same event may be sent more than once. Please make note of the duplication in the comments when declining the EPA.
- **Test or Training EPA** – An EPA may have been sent to you to practice using the system or to train others. This is typically triggered by another faculty member, and a conversation about the EPA being for training purposes only will likely have occurred in advance.
- **Incorrect EPA** – This can take place if the person triggering the assessment selected an EPA in error that does not align with the activities observed. Please decline the incorrect EPA and trigger the correct one.
- **Unaware an assessment would be requested** – An EPA may be declined if the assessor was unaware that an EPA would be triggered prior to an observed activity. Please provide reasons for declining the EPA in the comments, and provide feedback to the trainee to discuss the assessment prior to the activity in the future.

- **Did not work with the learner** – An EPA may be declined if the assessor was sent an EPA request for an activity they did not observe. Please note this in the comments when the EPA is declined.

1. Once logged into Elentra, click on your outstanding assessments (1) to view any EPAs that residents have initiated to you.

2. On the EPA you wish to decline, simply click on Remove Task (2). This will open a pop up where you will have to provide a reason as to why you wish to remove the task.
3. Choose a reason from removal from the list, or choose Other (3) if your reason isn't listed and add a description in the text box.

The reason provided for declining EPAs is visible to the resident in their My Triggered Tasks.

Faculty can see the amount of EPAs that have been deleted in their faculty assessor report but can't see any details associated with that deleted EPA (i.e. which resident deleted the EPA, which EPA it was linked to, etc.).

More information on this can be found in the reports section of this guide (8.0).
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 (1) icon in the top right corner. Select the My Feedback (2) tab. You will then see a list of feedback. To view in more detail, select View Details (3).
Narrative Notes allow Faculty members to be able to leave constructive comments and/or upload documents related to a CBME learner’s progress.

1. Under the profile icon, select Narratives (1) from the drop-down menu. Click Add Note (2).

2. Next, fill in the mandatory fields (3): Select a Resident, Select a Program, and add Comment. Optionally, upload a document to attach to the narrative note. Click Submit (4).
3. The Narrative Note added (as well as any others previously added) will then be displayed. You can then edit or delete your submitted reflections (5). NOTE: Residents can view Narrative Notes in the Resident Dashboard (7.5 of this guide). Narratives are also viewable in the Competence Committee Dashboard (9.0 of this guide).

Manage Narratives

<table>
<thead>
<tr>
<th>Date</th>
<th>Resident, Course</th>
<th>Note</th>
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<td>Narrative for Cardio test resident.</td>
<td>narrative_reflection_for_resident.doc</td>
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<tr>
<td>06/23/2021</td>
<td>Resident, Anesthesiology</td>
<td>Narrative Reflection uploaded for testing purposes.</td>
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</table>
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 (1). Select the course you wish to add the AA group to.

2. Under the Groups tab (2), select Add New Groups (3). 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.

   Edit Group

   Group Details

   Group Name: test
   Tutors: Type to search for tutors...

   View Members

   No Members Found.

   Add Members

   If you would like to add users that already exist in the course enrolment to this group, you can do so by clicking the checkbox beside their name from the list below. Once you have reviewed the list at the bottom and are ready, click the Proceed button at the bottom to complete the process.

   Members to be Added on Submission

   Cancel

   Proceed

   Add
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. NOTE – Academic Advisors also have access to view the NEW Competence Committee Dashboard of their assigned residents. Information on this can be found in section 9.0 of this guide.

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).

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

This section provides instructions on how to use the previous CBME Dashboard. Please note, a new updated Competence Committee Dashboard has been added to Elentra. Instructions on this can be found in section 9.0 of this guide.

The use of the previous CBME Dashboard explained in this section will continue to be available adjacent with the New Dashboard. Any stages of training or EPA’s marked as achieved will automatically be transferred into the New Dashboard.

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). 

![Dashboard Screenshot](image-url)
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).

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 (5).
3. You can also click on the individual assessment (6) to view further information and breakdowns.

CBME Dashboard

Anatomical Pathology

Graham, Hubert
user:6537@example.org

Transition to Discipline -

D1 Participating in basic specimen handing

2021-08-27

To mark an EPA or stage of training achieved, 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 achieved.
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).
5.0 PROGRAM DIRECTORS

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 Form Feedback

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](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.

![Assessment Tools](image)
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. 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 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 Form Feedback

When faculty complete EPAs, all EPA forms conclude with a concern and form feedback section. **Concerns** are intended to identify any patient safety, professional concerns, etc. related to the resident, whereas the **form feedback** is intended to be about the form or EPA itself (resident feedback should be in the EPA comments). Both of these sections are not viewable to residents.

If a concern and/or form feedback is indicated, PDs and PAs will receive an email notification. PDs and PAs can also view any of these prompted responses by navigating to **Admin → Assessment & Evaluation (1)** within Elentra, then under the **Prompted Responses (2)** filter.
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).
6.0 PROGRAM ADMINISTRATORS

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 Form Feedback
6.3 Accessing My Learners Tab
   6.3.1 CBME Dashboard
   6.3.2 My Learner Assessments
6.4 Accessing My Faculty Tab
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.
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).

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 Form Feedback

When faculty complete EPAs, all EPA forms conclude with a concern and form feedback section. Concerns are intended to identify any patient safety, professional concerns, etc. related to the resident, whereas the form feedback is intended to be about the form or EPA itself (resident feedback should be in the EPA comments). Both of these sections are not viewable to residents.

Concerns
Related to resident
Not viewable by resident

Form feedback
Related to form or EPA
Not viewable by resident

If a concern and/or form feedback is indicated, PDs and PAs will receive an email notification. PDs and PAs can also view any of these prompted responses by navigating to Admin → Assessment & Evaluation (1) within Elentra, then under the Prompted Responses (2) filter.
PAs are able to view their program’s residents’ Assessments and CBME Dashboard 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

NOTE – Program Administrators also have access to view the NEW Competence Committee Dashboard of their program’s residents. Information on this can be found in section 9.0 of this guide.

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).

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**

**Anatomical Pathology**

<table>
<thead>
<tr>
<th>Graham, Hubert</th>
<th><a href="mailto:user+0037@example.org">user+0037@example.org</a></th>
</tr>
</thead>
<tbody>
<tr>
<td>1234567890</td>
<td></td>
</tr>
</tbody>
</table>

**Transition to Discipline**

**01** Participating in basic specimen handling

**Current Assessments**

| Anatomical Pathology: Transition to Discipline EPA | 3 |

**Archived Assessments**

6 Assessments 0 Archived Assessments

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### 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

7.4 Narratives
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 (5) 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 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
- Complete and confirm via email
- Complete and confirm via PIN
- Self-Assessment, then email blank form

Select Date of Encounter: 2021-01-21

Select an EPA:
D0: 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).

- **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
- **Assessment Tools:** Search Assessment Tools...

![Assessment Cue](image)

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.

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

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

   **Assessor:**
   Frederick Koller
   Faculty + Postgraduate Medical Education
   user: 7020@example.org

   **Target:**
   Abe Moore
   Student + Postgraduate Medical Education
   user: 9476@example.org

   Task delivered on 2020-10-20
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.

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.

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

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

Assessment Tools

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
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.
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.

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 their CBME Progress. The Dashboard can be accessed from any page within Elentra, simply by clicking on the Dashboard tab in the main ribbon, and then the CBME Progress tab.

NOTE – a NEW Resident Dashboard is now available as of August 2021, information on this can be found in section 7.5 NEW Resident Dashboard.

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 Progress where you can switch between programs for any aspect of the CBME Progress.

7.3.2 Stages

1. Under the Stages (1) tab of the CBME Progress, 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.
### Assessments and Providing Faculty Feedback

7.3.3 Assessments and Providing Faculty Feedback

<table>
<thead>
<tr>
<th>Number of EPAs</th>
<th>Score achieved per EPA completed.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>F1</strong></td>
<td>Providing initial management for critically ill surgical patients</td>
</tr>
<tr>
<td><strong>F2</strong></td>
<td>Providing initial management for trauma patients</td>
</tr>
</tbody>
</table>
1. Under the Assessments (1) tab of the CBME Progress, you are able to filter (2) completed, in-progress, pending, and deleted EPAs if needed.

CBME Dashboard

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 Progress, as explained in section 7.3.5.

Completed Assessments

7.3.4 Assessment Items, Trends, and Comments

1. Residents can also view their CBME Progress 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 Progress.

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

7.4 NARRATIVE NOTES

Narrative Notes added by Faculty members (as outlined in section 2.3 of this guide) are now available in the NEW Resident Dashboard. Information on the NEW Resident Dashboard can be found in the next section of this guide.
7.5 NEW RESIDENT DASHBOARD

7.5.1 Accessing the NEW Resident Dashboard

As of August 2021, the NEW Resident Dashboard will automatically display when logging into Elentra. You can navigate back to this page at any time by clicking on the Dashboard option in the purple ribbon.

The previous CBME Progress section is still accessible by clicking on the following tab. The CBME Progress will be phased out in the future as soon as residents become more familiar with the NEW Resident Dashboard.
7.5.2 Key Dashboard Features

The following images show what the new dashboard looks like at a glance. Please note that clicking on the (i) infographics will open up a detailed description on each of the widgets. These descriptions will explain what information the widget contains, as well as a legend to any necessary colour coding.

For the purposes of this guide, each widget and important information in the accordion has been numbered. A corresponding explanation for each of these areas can be found on the subsequent page below the screenshots in Table B.

NOTE: Assessment Plan data is calculated once daily while all other Dashboard features are updated automatically.
<table>
<thead>
<tr>
<th></th>
<th>TABLE B – Dashboard Key Features Explanations</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td><strong>Resident Information</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Level:</strong> The resident’s current PGY level of training</td>
</tr>
<tr>
<td></td>
<td><strong>Start Year:</strong> The year the resident started their current program</td>
</tr>
<tr>
<td></td>
<td><strong>Status:</strong> The current status as determined by the Competence Committee (CC). The status is set when a CC Meeting Note is logged*</td>
</tr>
<tr>
<td></td>
<td><strong>Last EPA Achieved:</strong> The most recent EPA that has been achieved, as determined by the CC*</td>
</tr>
<tr>
<td></td>
<td><strong>Last CC Meeting:</strong> The date of the most recent CC meeting. This is set when a CC Meeting Note is logged*</td>
</tr>
<tr>
<td></td>
<td>*N/A will be displayed if the resident is new and has not yet achieved an EPA or been reviewed by the CC</td>
</tr>
<tr>
<td>2</td>
<td><strong>Scatter Plot</strong></td>
</tr>
<tr>
<td></td>
<td>The scatter chart shows the relationship between the entrustment score (y) over time (x). Each plot on the chart represents a completed EPA assessment; hovering over the plot will display the assessment title, assessor, completion date, and narrative comments. The plots are colour coded by stage of training, seen throughout Elentra: Blue - Transition to Discipline Green - Foundations of Discipline Orange - Core of Discipline Red - Transition to Practice</td>
</tr>
<tr>
<td></td>
<td>There are options to display all EPA assessments completed on the resident in the past 30, 90, or 365 days; as well as since the last CC Meeting (this option will only be displayed if a CC Meeting Note has been logged).</td>
</tr>
<tr>
<td>3</td>
<td><strong>EPA Metrics</strong></td>
</tr>
<tr>
<td></td>
<td>This chart displays the number of EPA metrics for the resident since the last CC Meeting as well as for the current stage of training.</td>
</tr>
<tr>
<td></td>
<td><strong>Requested:</strong> The number of EPA assessments that were triggered by either the resident or the assessor</td>
</tr>
<tr>
<td></td>
<td><strong>Completed:</strong> The number of EPA assessments that were completed</td>
</tr>
<tr>
<td><strong>Entrustment Score &gt;=4:</strong></td>
<td>The number of completed assessments with an entrustment score of 4 or 5</td>
</tr>
<tr>
<td>----------------------------</td>
<td>---------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Expired:</strong></td>
<td>The number of EPA assessments that expired without being completed in 30 days</td>
</tr>
<tr>
<td><strong>Please note:</strong></td>
<td>The number of EPA assessments that were completed or expired could include assessments that were initiated prior to the last CC Meeting, so these totals could be higher than the number requested.</td>
</tr>
</tbody>
</table>
| **Stage Total Colouring:** | - Green: +6 above cohort average  
- Blue: +/-5 from cohort average  
- Yellow: -6 below cohort average |

4) Notes

Different types of notes are added to your dashboard by your program's faculty members and/or CC:

**EPA Note:** This type of note is linked to a specific EPA.

**Narrative:** This type of note can be used to provide narrative feedback to the resident that is not tied to a specific EPA.

5) Accordions

Click on the dropdown arrows to expand each stage of training and EPA.

Expanding the stage of training will reveal the EPAs associated with the stage, with further dropdown options to view the EPA Assessment Plan.

6) Achieved Stages & EPAs

Green checkmarks indicate that the corresponding EPA or stage of training have been achieved. This is added manually by the program's CC.

7) Entrustment Scale Scores

This area provides a summary of the completed EPA assessments and their associated entrustment scale score.

The first box shows how many EPA assessments were completed with a score of 1, the next with a score of 2, and so on.
| 8) Assessment Plan | Note - This feature will be missing if your Assessment Plan has not yet been configured by the PGME Elentra Team. Please see the note below for more information on this.

Each EPA with an Assessment Plan has the ability to drill down further into each Contextual Variable (CV) required to meet the EPA requirements. This will show how many of each CV the resident has achieved and how many are required.

Drilling down further on each CV accordion will show which assessments meet the given CV. Clicking on these assessments will open the completed form in a new tab for review.

**NOTE:** Assessment Plan data is updated once daily.

| 9) Assessment Info | Each assessment listed will include the form title, date of completion and the assessor name.

Hovering over the comment icon will reveal the mandatory comments left for that given assessment.

| 10) All Assessments | The All Assessments accordion shows a list of all of the resident's completed assessments for the given EPA.

| 11) Percentages | Each EPA will show the percentage of completion.

Some EPAs may show more than 100%. In this case, the resident has exceeded the Assessment Plan requirements for the given EPA.

EPAs may also show more than 100% when NOT all Assessment Plan requirements are met. In these instances, percentages will have an asterisks (*) next to them. For example, a resident may have 3/1 of one required CV, but 1/2 of another required CV. This would show their total as 133%* as they have not completed all requirements.

**NOTE** - Some Assessment Plans may not yet be available as the PGME Elentra team is continuously working on updating these for each EPA, for each program. If an Assessment Plan is not yet configured, there will be no Assessment Plan drop down for the given EPA. The PGME Elentra team will be in contact with programs with incomplete Assessment Plans and notify them as soon as they become available.
There are two types of notes available for residents to view that may be added by their program's faculty and/or Competence Committee: EPA Notes (can be added by CC only) and Narratives (can be added by all faculty). These notes will be displayed in the Notes section of the Dashboard, which can be filtered by Note type.

EPA Notes are also displayed on the EPA they correspond with, as seen in the example below. Clicking on the conversation icon will display the EPA Note.
8.0 REPORT PORTAL

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
8.1 ELENTRA ACCESS POLICY

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>
</tbody>
</table>
PAs & PDs | PAs & PDs should have access during course set up, but if not please contact Elentra Support. | PAs and PDs can see Raw EPA Data for the EPAs that their program’s residents have completed.
---|---|---
Residents | Automatic | Residents are able to see their own data.
Academic Advisors | Ensure you are set up as an AA, or contact Elentra Support for help | AAs can see data for their Learners only.
PAs, PDs & CC Members | PAs, PDs ands CC Members should have access during course set up, but if not please contact Elentra Support. | PAs, PDs & CC Members can see data for their program’s residents only.

### 8.3 ACCESSING THE REPORT PORTAL

1. To access the portal, 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.

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.

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.
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
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.

![Resident Milestone Summary example image]
The New Competence Committee Dashboard aims to replace the previous CBME Dashboard outlined throughout this guide. For the time being, both Dashboards will continue to be available.

Any stages of training or EPAs deemed as achieved in the previous CBME Dashboard will automatically be transferred to this New Dashboard.

The topics covered in this section include:

- 9.1 Accessing Residents' NEW Dashboard
- 9.2 Key Dashboard Features
  - 9.2.1 TABLE A – Dashboard Key Features Explanations
- 9.3 Adding Dashboard Notes
  - 9.3.1 CC Meeting Note
  - 9.3.2 EPA Note
  - 9.3.3 General Note
  - 9.3.4 Narrative
- 9.4 Marking EPAs or Stage of Training Complete
9.1 ACCESSING RESIDENTS’ NEW DASHBOARD

This dashboard is available for all Competence Committee (CC) members, Academic Advisors (AA), Program Directors (PD) and Program Administrators (PA) for all CBME programs launched in Elentra. Academic Advisors only have access to their corresponding residents (view only), whereas CC Members, PDs, and PAs have access to all residents in the program. If you are a CC, AA, PD, or PA and cannot access the dashboard, please reach out to Elentra Support at elentra.support@schulich.uwo.ca.

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).

4. After navigating to the My Learners area of Elentra, click on the ellipsis of the learner you wish to view the New Dashboard of, and select NEW Dashboard (4).
9.2 KEY DASHBOARD FEATURES

The following images show what the new dashboard looks like at a glance. Please note that clicking on the (i) infographics will open up a detailed description on each of the widgets. These descriptions will explain what information the widget contains, as well as a legend to any necessary colour coding.

For the purposes of this guide, each widget and important information in the accordion has been numbered. A corresponding explanation for each of these areas can be found on the subsequent page below the screenshots in Table A.

**NOTE: Assessment Plan data is calculated once daily while all other Dashboard features are updated automatically.**
### TABLE A – Dashboard Key Features Explanations

<table>
<thead>
<tr>
<th>1) Resident Information</th>
<th>Level: The resident’s current PGY level of training</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Start Year:</strong> The year the resident started their current program</td>
</tr>
<tr>
<td></td>
<td><strong>Status:</strong> The current status as determined by the Competence Committee (CC). The status is set when a CC Meeting Note is logged*</td>
</tr>
<tr>
<td></td>
<td><strong>Last EPA Achieved:</strong> The most recent EPA that has been achieved, as determined by the CC*</td>
</tr>
<tr>
<td></td>
<td><strong>Last CC Meeting:</strong> The date of the most recent CC meeting. This is set when a CC Meeting Note is logged*</td>
</tr>
<tr>
<td></td>
<td>*N/A will be displayed if the resident is new and has not yet achieved an EPA or been reviewed by the CC</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2) Cohort Comparison</th>
<th>This is a comparison of a resident’s progress within their current stage of training compared to the average of other residents in the same program and stage of training</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Stage:</strong> The resident's current CBME Stage of Training:</td>
</tr>
<tr>
<td></td>
<td>- <strong>D =</strong> Transition to Discipline</td>
</tr>
<tr>
<td></td>
<td>- <strong>F =</strong> Foundations of Discipline</td>
</tr>
<tr>
<td></td>
<td>- <strong>C =</strong> Core of Discipline</td>
</tr>
<tr>
<td></td>
<td>- <strong>P =</strong> Transition to Practice</td>
</tr>
<tr>
<td></td>
<td><strong>EPAs Achieved:</strong> The number of EPAs achieved within the resident's current stage of training (achieved EPAs will have a green check mark as added by the CC). Displayed as both a percentage and integer; colour-coded as follows:</td>
</tr>
<tr>
<td></td>
<td>- Green: Above average</td>
</tr>
<tr>
<td></td>
<td>- Blue: Same as average</td>
</tr>
<tr>
<td></td>
<td>- Yellow: Below average</td>
</tr>
</tbody>
</table>

| 3) Scatter Plot | The scatter chart shows the relationship between the entrustment score (y) over time (x). Each plot on the chart represents a completed EPA assessment; hovering over the plot will display the assessment title, assessor, completion date, and narrative |
comments. The plots are colour coded by stage of training, seen throughout Elentra:
- Blue - Transition to Discipline
- Green - Foundations of Discipline
- Orange - Core of Discipline
- Red - Transition to Practice

There are options to display all EPA assessments completed on the resident in the past 30, 90, or 365 days; as well as since the last CC Meeting (this option will only be displayed if a CC Meeting Note has been logged).

<table>
<thead>
<tr>
<th>4) EPA Metrics</th>
</tr>
</thead>
<tbody>
<tr>
<td>This chart displays the number of EPA metrics for the resident since the last CC Meeting as well as for the current stage of training, and compares it to the cohort average in the same program and stage of training.</td>
</tr>
<tr>
<td><strong>Requested:</strong> The number of EPA assessments that were triggered by either the resident or the assessor</td>
</tr>
<tr>
<td><strong>Completed:</strong> The number of EPA assessments that were completed</td>
</tr>
<tr>
<td><strong>Entrustment Score &gt;=4:</strong> The number of completed assessments with an entrustment score of 4 or 5</td>
</tr>
<tr>
<td><strong>Expired:</strong> The number of EPA assessments that expired without being completed in 30 days</td>
</tr>
<tr>
<td><strong>Please note:</strong> The number of EPA assessments that were completed or expired could include assessments that were initiated prior to the last CC Meeting, so these totals could be higher than the number requested.</td>
</tr>
<tr>
<td><strong>Stage Total Colouring:</strong></td>
</tr>
<tr>
<td>- Green: +6 above cohort average</td>
</tr>
<tr>
<td>- Blue: +/-5 from cohort average</td>
</tr>
<tr>
<td>- Yellow: -6 below cohort average</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>5) Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anyone with CC Dashboard access can add/edit/delete their own notes, and they can view notes added by others, with the exception of CC Meeting Notes, which can only be added and reviewed by CC members.</td>
</tr>
<tr>
<td>Feature</td>
</tr>
<tr>
<td>---------</td>
</tr>
<tr>
<td><strong>CC Meeting Note:</strong></td>
</tr>
<tr>
<td><strong>EPA Note:</strong></td>
</tr>
<tr>
<td><strong>General Note:</strong></td>
</tr>
<tr>
<td><strong>Narrative:</strong></td>
</tr>
<tr>
<td><strong>6) Accordions</strong></td>
</tr>
<tr>
<td><strong>7) Entrustment Scale Scores</strong></td>
</tr>
<tr>
<td><strong>8) Assessment Plan</strong></td>
</tr>
<tr>
<td>9) Assessment Info</td>
</tr>
<tr>
<td>-------------------</td>
</tr>
<tr>
<td>10) All Assessments</td>
</tr>
<tr>
<td>11) Percentages</td>
</tr>
</tbody>
</table>

**NOTE** - Some Assessment Plans may not yet be available as the PGME Elentra team is continuously working on updating these for each EPA, for each program. If an Assessment Plan is not yet configured, there will be no Assessment Plan drop down for the given EPA. The PGME Elentra team will be in contact with programs with incomplete Assessment Plans and notify them as soon as they become available.
9.3 ADDING DASHBOARD NOTES

Anyone with CC Dashboard access can add/edit/delete their own notes, and they can view notes added by others, with the exception of CC Meeting Notes, which can only be added and reviewed by CC members.

1. To add a note, simply click Add Note (1).
2. Next, select your Note Type (2) and fill in the mandatory fields (these may vary based on type of note). Optionally, you can upload a file to the note and click Submit (3) to add.
9.3.1 CC Meeting Note

This type of note is used to add dates of CC Meetings and the Resident Status as recommended at the meeting. The CC Meeting Date and Resident Status will be displayed in the Resident Profile, and the date will also determine which data is displayed in the Scatter Chart and the EPA Metrics Chart. **This type of note is available to CC Members only, and is NOT visible to the resident.**

Highlighted in red below are the areas that will update based on the date entered in the CC Meeting Note.

9.3.2 EPA Note

This type of note is linked to a specific EPA. **This type of notes is available to CC, PA and PDs, and is visible to the resident.**

Once an EPA Note is added, it is displayed beside the given EPA. Hovering over the conversation icon will display the information provided in the EPA Note.
9.3.3 General Note

This type of note can be used for any general purposes; it can be used to upload a file that is not necessarily CC Meeting or EPA related; and comments can be added. This type of note is available to CC, PAs and PDs, and is NOT visible to the resident.

General Notes are displayed in the Notes area of the Dashboard, along with all other note types. You can use the filter to choose which types of notes you want displayed.

![Image of Notes Area]

9.3.4 Narrative Notes

This type of note can be used to provide narrative feedback to the resident that is not tied to a specific EPA. This type of note is available to AA, CC, PAs and PDs, and is visible to the resident.

This type of note is also displayed in the Notes area of the CC Dashboard, as seen in the screenshot above in section 9.3.3.

Narratives can also be added by faculty members who do not have CC Dashboard access. More information on this can be found in section 2.3 of this guide.
Any EPAs or stages of training already marked as achieved will automatically be transferred to the new CC Dashboard.

The process of marking EPAs or stages achieved in the new CC Dashboard is very similar to the previous CBME dashboard:

1. Click on the checkbox (1) for the EPA or stage of training you wish to deem achieved.

2. Add an optional reason, and click Confirm (2).

**Note:** You can un-mark EPAs or stages of training by following the same process.