

# 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.**

## TABLE OF CONTENTS

<b>1.0</b>	<b>All Users.....</b>	<b>4</b>
1.1	Support Contacts.....	5
1.2	Browser Limitations.....	6
1.3	Saving Elentra as a Shortcut on Desktop and/or Mobile.....	7
1.3.1	Saving as a Shortcut on a Desktop Computer.....	7
1.3.2	Saving as a Shortcut on iOS Devices.....	8
1.3.3	Saving as a Shortcut on Android Devices.....	9
1.4	Logging into Elentra.....	9
1.4.1	Elentra Credentials.....	9
1.4.2	Main Page Information.....	10
1.5	Profile Features.....	11
1.5.1	Setting a PIN.....	11
1.5.2	Secondary Email.....	12
1.6	Bookmarks.....	13
<b>2.0</b>	<b>All Faculty.....</b>	<b>14</b>
2.1	EPAs.....	15
2.1.1	Triggering EPAs.....	15
2.1.2	Resident Triggered EPAs.....	15
2.1.3	Faculty Triggered EPAs.....	16
2.1.4	Completing EPAs Saved as Draft.....	19
2.1.5	EPA Expiry and Email Reminders.....	20
2.1.6	Viewing Completed EPAs.....	21
2.2	Viewing Assessment Feedback from Residents.....	22
<b>3.0</b>	<b>Academic Advisors.....</b>	<b>23</b>
3.1	How to Obtain AA Access.....	24
3.2	Creating AA Groups.....	24
3.3	Access to Dashboard of AA's Learners.....	26
3.3.1	Pinning an Assessment.....	28
<b>4.0</b>	<b>Competence Committee Members.....</b>	<b>30</b>
4.1	How to Obtain CC Access.....	31
4.2	Access to Dashboard of All Learners.....	31
4.3	Marking an EPA or Stage of Training Complete.....	33
<b>5.0</b>	<b>Program Directors.....</b>	<b>35</b>
5.1	EPA Assessments.....	36
5.1.1	Triggering Assessments on Behalf of Others.....	36
5.1.2	Triggering Assessments to External Assessors.....	37
5.1.3	Reviewing Outstanding, Deleted, and Expired EPAs.....	39
5.1.4	Sending EPA Reminders and Deleting EPA Tasks.....	39
5.1.5	Concern Flags and Emails.....	42
5.2	Accessing My Faculty Tab.....	43
<b>6.0</b>	<b>Program Administrators.....</b>	<b>45</b>
6.1	Course Setup.....	46
6.2	EPA Assessments.....	48
6.2.1	Triggering Assessments on Behalf of Others.....	48

6.2.2	Triggering Assessments to External Assessors.....	49
6.2.3	Reviewing Outstanding, Deleted, and Expired EPAs .....	51
6.2.4	Sending EPA Reminders and Deleting EPA Tasks .....	51
6.2.5	Concern Flags and Emails .....	54
6.3	Accessing My Learners Tab.....	55
6.3.1	CBME Dashboard .....	56
6.3.2	My Learner Assessments.....	57
6.4	Accessing My Faculty Tab .....	59
<b>7.0</b>	<b>Residents .....</b>	<b>61</b>
7.1	EPAS as a Target.....	62
7.1.1	Triggering EPAs .....	62
7.1.2	Completing EPAs .....	67
7.1.3	EPA Expiries and Reminder Emails.....	69
7.1.4	Viewing Tasks Completed on Me.....	70
7.1.5	Viewing My Triggered Tasks and Sending Reminders .....	71
7.2	EPAS as an Assessor .....	72
7.2.1	Triggering and Completing EPAs.....	72
7.2.2	Viewing My Completed Tasks .....	77
7.3	Managing CBME Dashboard .....	78
7.3.1	Multiple Programs .....	78
7.3.2	Stages .....	79
7.3.3	Assessments and Providing Faculty Feedback .....	80
7.3.4	Assessment Items, Trends, and Comments .....	81
7.3.5	Pins .....	82
<b>8.0</b>	<b>Report Portal.....</b>	<b>83</b>
8.1	Elentra Access Policy.....	84
8.2	Who Has Access? .....	84
8.3	Accessing the Report Portal.....	85
8.4	Available Reports .....	86
8.4.1	Assessor Statistics Reports .....	86
8.4.2	Raw EPA Data .....	89
8.4.3	Resident EPA Summary & Resident EPA Details .....	90
8.4.4	Resident Milestone Summary .....	92

## 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

## 1.1 SUPPORT CONTACTS

Contact	Email
<p><b>Elenra Support</b> for Postgraduate and Undergraduate Medical Programs</p> <p>*Questions for Elenra support should be specific to the use of Elenra only. Program-specific questions should be addressed to the Program Director or Program Administrator.</p>	<p><a href="mailto:Elenra.support@schulich.uwo.ca">Elenra.support@schulich.uwo.ca</a></p>
<p><b>Schulich Helpdesk</b> – Schulich IT issues unrelated to Elenra</p>	<p>Website <a href="#">link</a>.</p>
<p><b>WTS</b> – UWO password reset</p>	<p>Website <a href="#">link</a>.</p>
<p><b>Postgraduate Medical Education Policies</b></p>	<p>Website <a href="#">link</a>.</p>

## 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/> 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.**



### Your connection is not private

Attackers might be trying to steal your information from **elentra-staging.schulich.uwo.ca** (for example, passwords, messages, or credit cards). [Learn more](#)

NET::ERR\_CERT\_AUTHORITY\_INVALID

- Help improve security on the web for everyone by sending URLs of some pages you visit, limited system information, and some page content to Google. [Privacy policy](#)

Advanced

1

Back to safety



### Your connection is not private

Attackers might be trying to steal your information from **elentra-staging.schulich.uwo.ca** (for example, passwords, messages, or credit cards). [Learn more](#)

NET::ERR\_CERT\_AUTHORITY\_INVALID

- Help improve security on the web for everyone by sending URLs of some pages you visit, limited system information, and some page content to Google. [Privacy policy](#)

Hide advanced

Back to safety

This server could not prove that it is **elentra-staging.schulich.uwo.ca**; its security certificate is not trusted by your computer's operating system. This may be caused by a misconfiguration or an attacker intercepting your connection.

Proceed to [elentra-staging.schulich.uwo.ca](https://elentra-staging.schulich.uwo.ca/) (unsafe)

2

## 1.3 SAVING ELENTRA AS A SHORTCUT ON DESKTOP AND/OR MOBILE

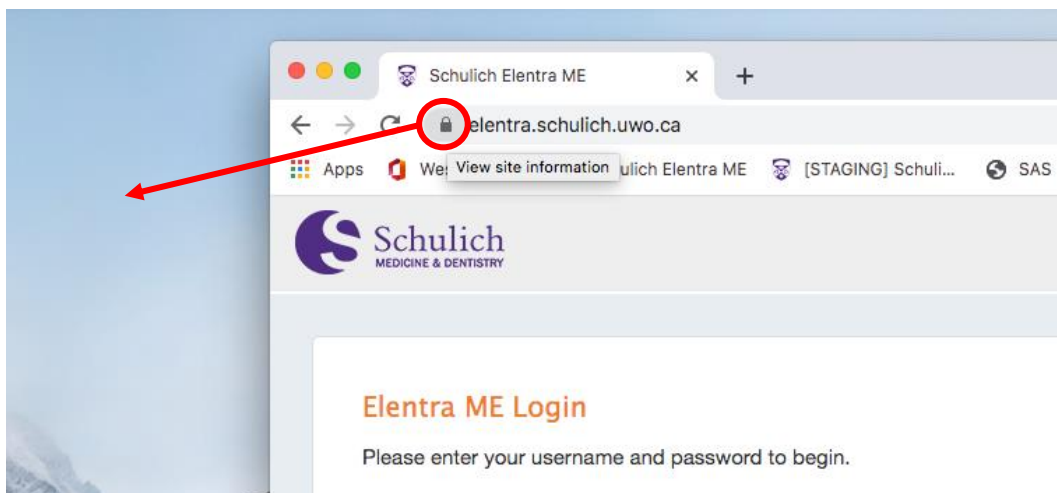
Elentra can be used on any desktop and/or iOS or Android device. The following section of this guide shows how to save Elentra as a shortcut on your device in order to navigate to the website easily for continued use.

### 1.3.1 Saving as a Shortcut on a Desktop Computer

Depending on the browser used, the following step may vary 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.

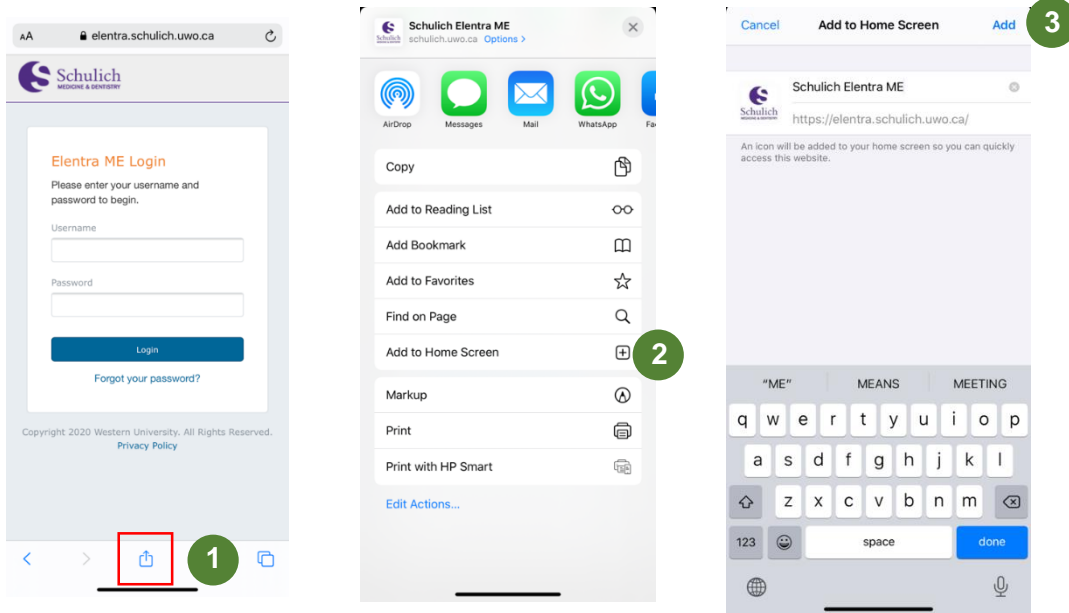


### 1.3.2 Saving as a Shortcut on iOS Devices

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.

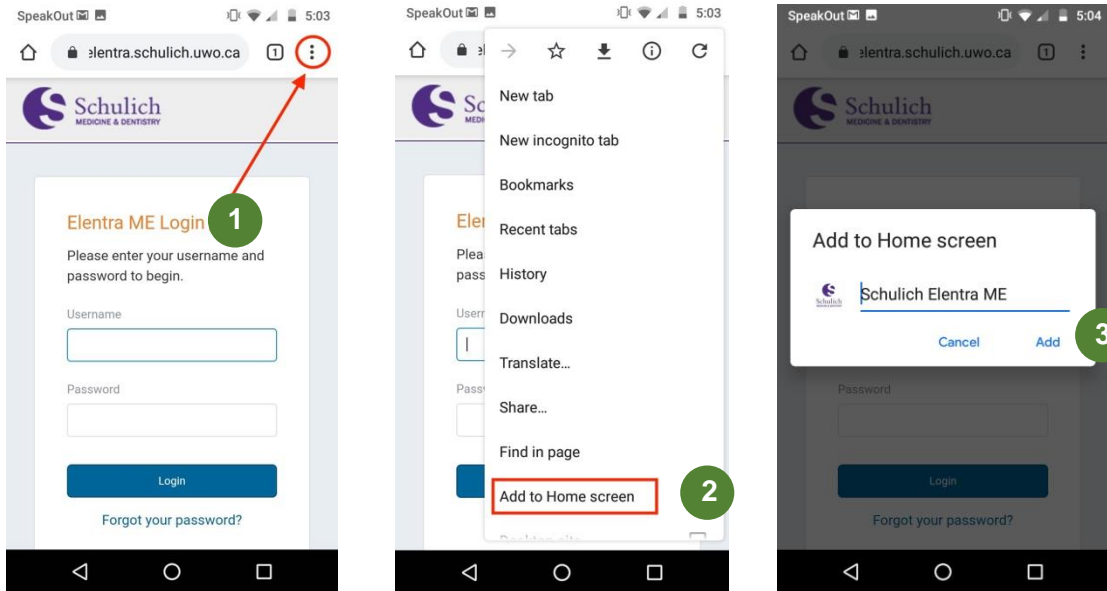




### 1.3.3 Saving as a Shortcut on Android Devices

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?7>.

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

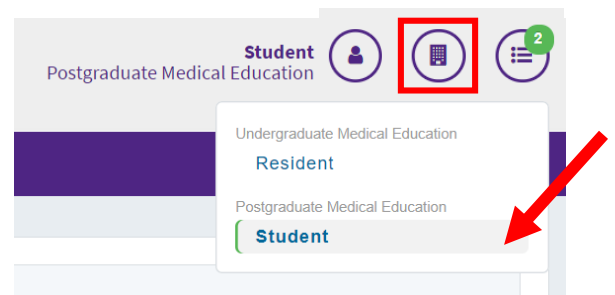
When logging into Elentra, you will notice two or three icons in the top right corner of the page, depending on your user permissions. Below gives a brief overview of what these three icons contain. This manual will refer to these areas often and will explain their functionality in greater detail.

- 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.

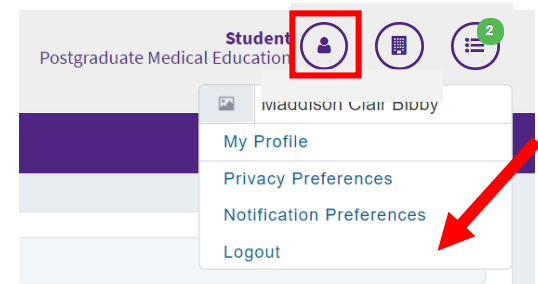


- 2 **Switch between UME & PGME\*** – after clicking on the icon indicated, you will then see a drop down where you can choose between UME and PGME. You won't see this unless you are a member of both organizations.

**\*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.

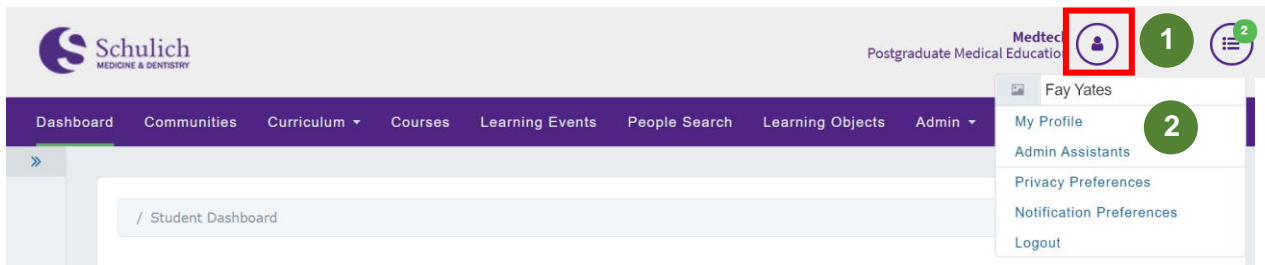


## 1.5 PROFILE FEATURES

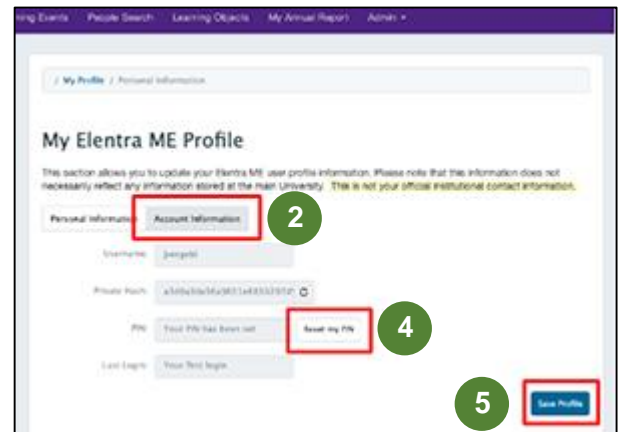
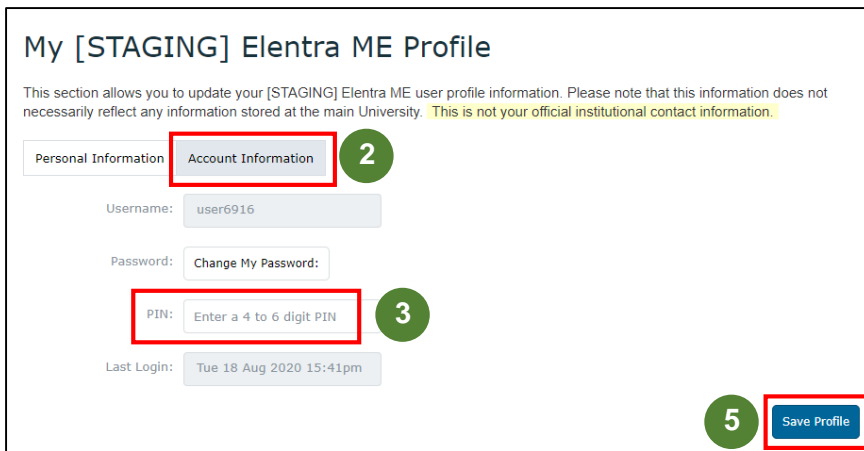
### 1.5.1 Setting a PIN

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).



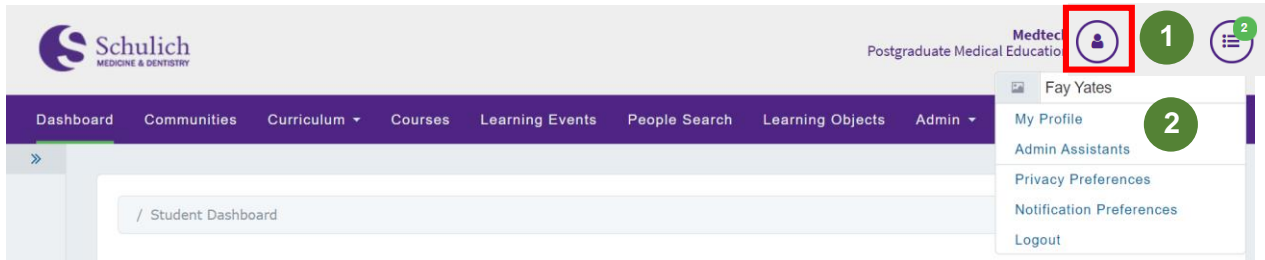
2. Toggle to Account Information (2). If you have not yet set up a PIN, you can enter it in the corresponding boxes (3). If you have already set up a PIN, and wish to reset it, click Reset PIN (4). Finally, click Save Profile (5).



## 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).

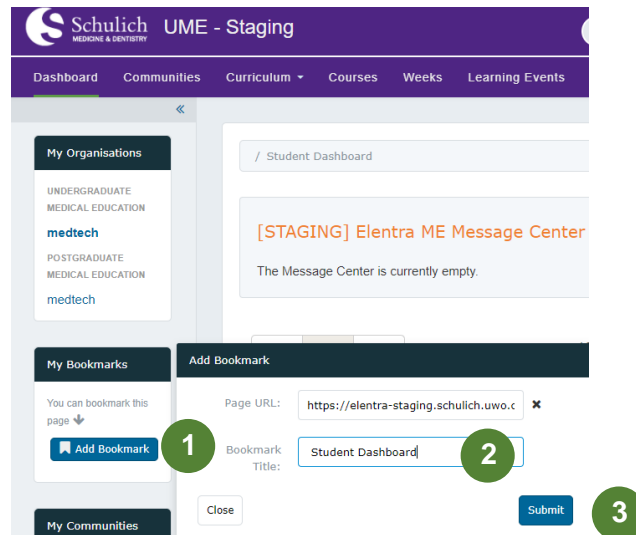
## My [STAGING] Elentra ME Profile

This section allows you to update your [STAGING] Elentra ME user profile information. necessarily reflect any information stored at the main University. **This is not your official**

Personal Information	Account Information
<input type="text" value="Orlando Ingram"/>	
Primary E-mail: <input type="text" value="user+6916@example.org"/>	
Secondary E-mail: <input type="text" value="example@email.com"/>	
<input type="checkbox"/> Use Secondary Email: (4)	Checking this box will enable Elentra to send all automated email messages to you at this secondary email address, as well as to your primary (@uwo.ca) email account. This is a good option for people who rarely check UWO mail, and/or have NOT forwarded their UWO mail to a preferred email account.
	(5) <input type="button" value="Save Profile"/>

## 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

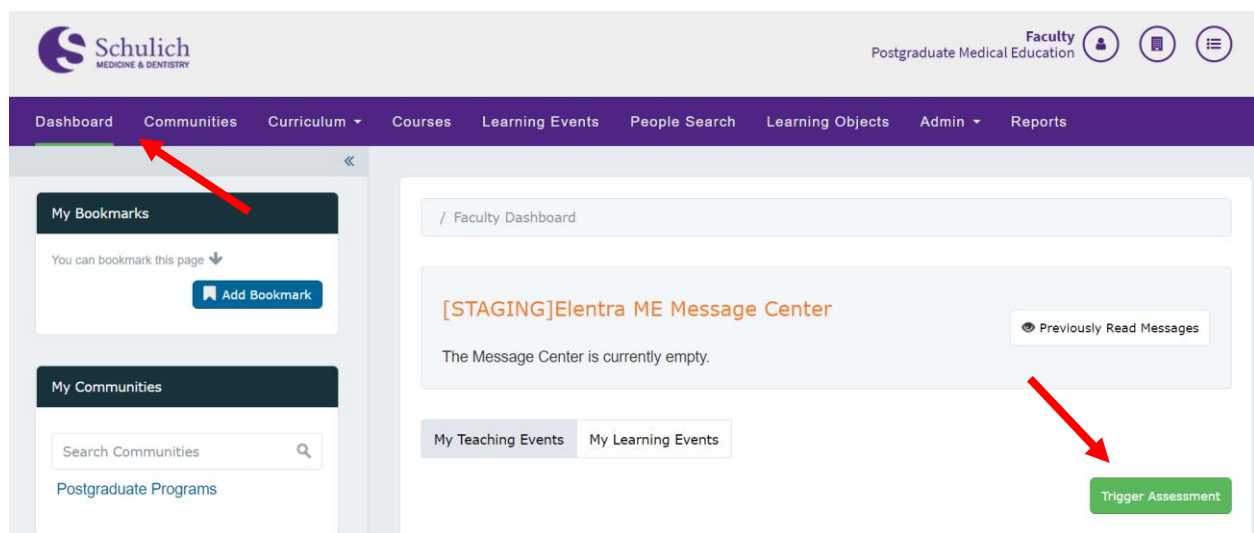
### 2.2 Viewing Assessment Feedback from Residents

## 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.

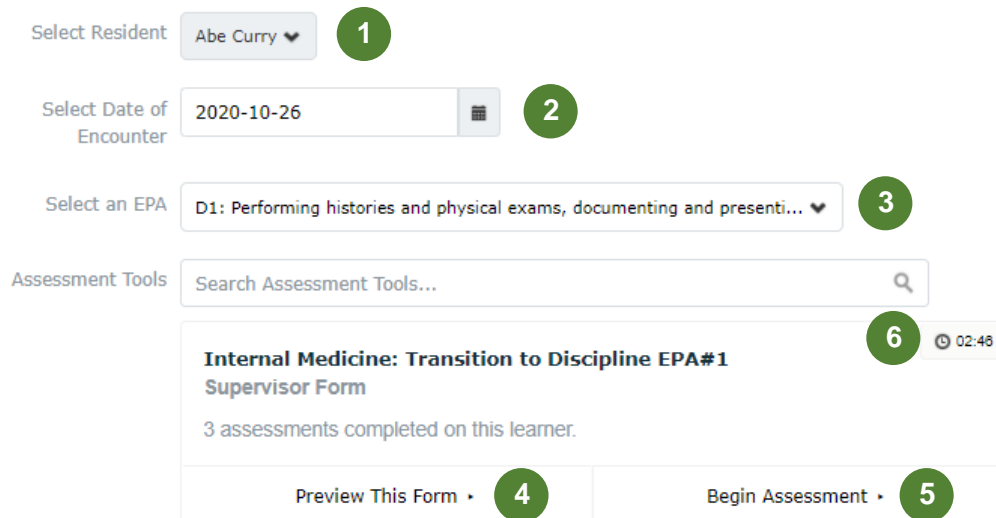
The steps below cover how to complete an entire EPA. Depending on the trigger method, some areas may already be filled in and will just need to be reviewed:

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.

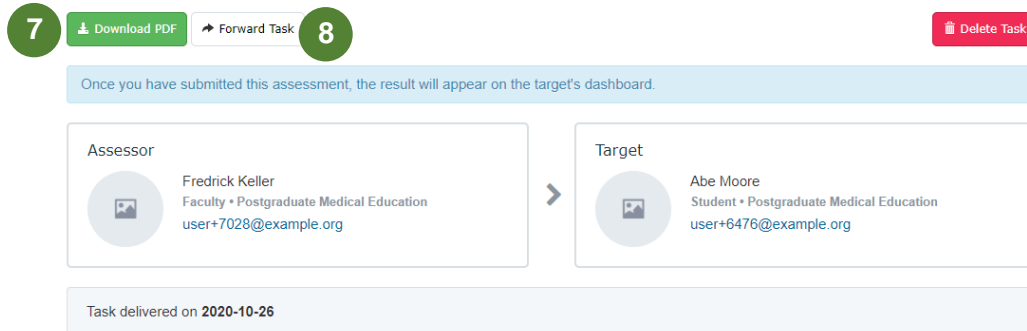
## Assessment Tools



The screenshot shows the 'Assessment Tools' interface. At the top, there is a 'Select Resident' dropdown menu with 'Abe Curry' selected (1). Below it is a 'Select Date of Encounter' field with '2020-10-26' and a calendar icon (2). The 'Select an EPA' dropdown menu shows 'D1: Performing histories and physical exams, documenting and presenti...' (3). The 'Assessment Tools' section has a search bar with 'Search Assessment Tools...' and a magnifying glass icon. Below the search bar, a card displays 'Internal Medicine: Transition to Discipline EPA#1 Supervisor Form' (6) with a clock icon showing '02:46'. At the bottom of the card, there are two buttons: 'Preview This Form' (4) and 'Begin Assessment' (5). Below the card, it says '3 assessments completed on this learner.'

- 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



The screenshot shows the assessment task interface. At the top, there are three buttons: 'Download PDF' (7), 'Forward Task' (8), and 'Delete Task'. Below the buttons, there is a light blue box with the text: 'Once you have submitted this assessment, the result will appear on the target's dashboard.' Below this, there are two boxes: 'Assessor' and 'Target'. The 'Assessor' box shows a profile picture, the name 'Fredrick Keller', and the text 'Faculty • Postgraduate Medical Education user+7028@example.org'. The 'Target' box shows a profile picture, the name 'Abe Moore', and the text 'Student • Postgraduate Medical Education user+6476@example.org'. Below these boxes, there is a light blue box with the text: 'Task delivered on 2020-10-26'.

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

Assessment Plan:

- Indirect observation by supervisor

Basis of Assessment

-- Please Select --

Assessor's Role

-- Please Select --

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.

No  
 Yes

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

Are there other reasons to flag this assessment?  
No

Have feedback about this form? (eg, "Missing Dx", etc.)  
No

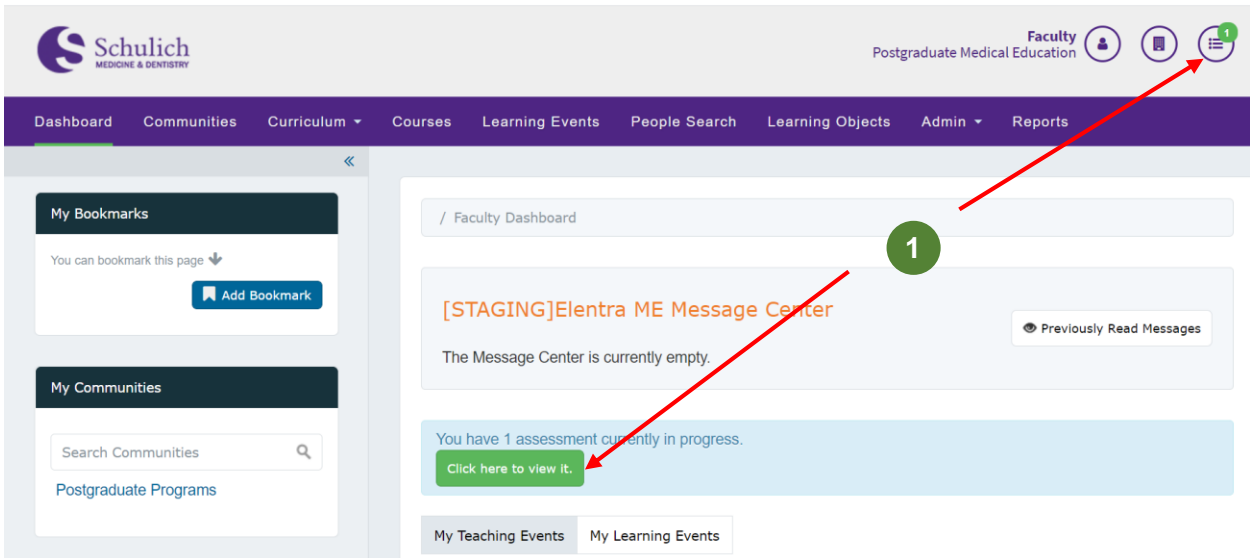
No  
 Yes

9

Save as Draft or Submit

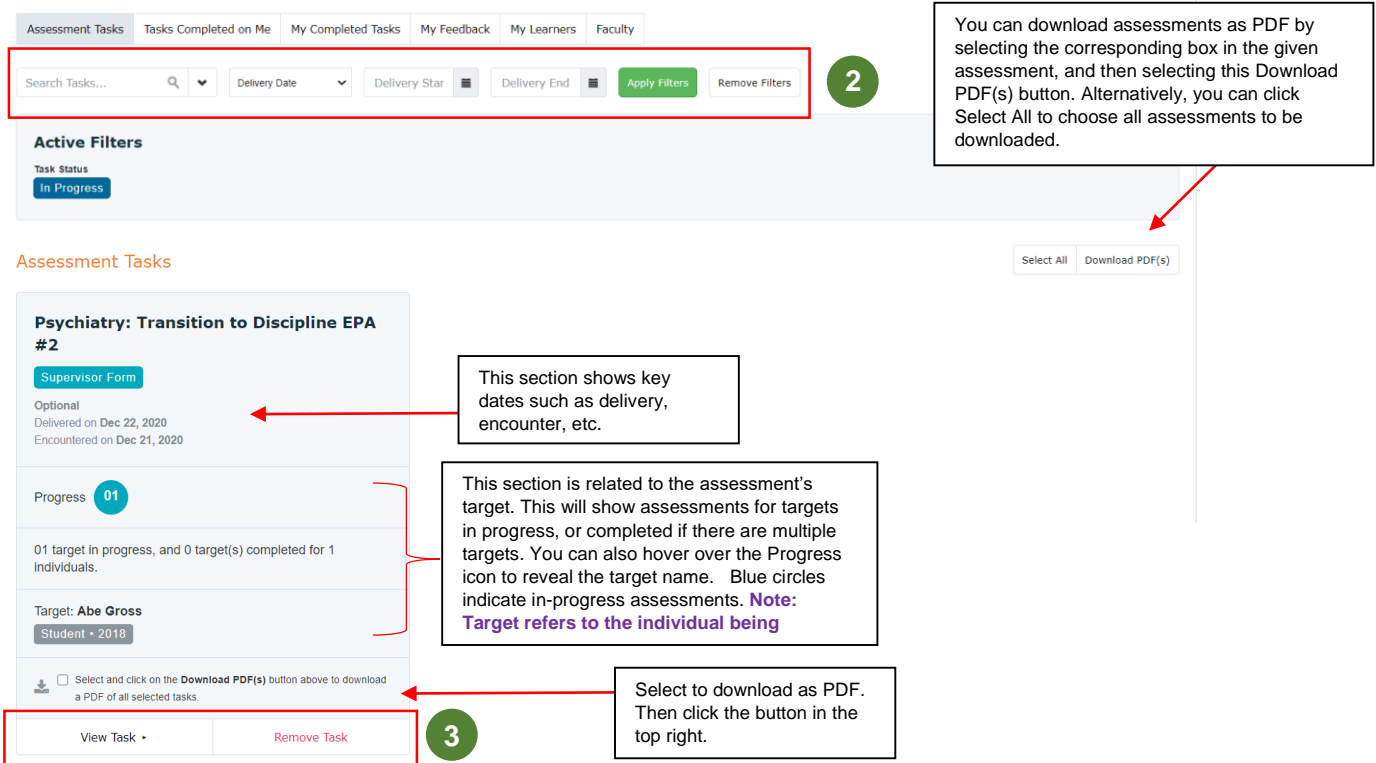
## 2.1.4 Completing EPAs Saved as Draft

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.



The screenshot displays the Schulich Faculty Dashboard. At the top right, there is a notification icon with a '1' badge. A red arrow points from this icon to a green circle containing the number '1' on the dashboard. Below this, a message states: 'You have 1 assessment currently in progress.' A green button labeled 'Click here to view it.' is positioned below the message. Another red arrow points from this button to the notification icon. The dashboard also features a navigation menu with items like Dashboard, Communities, Curriculum, Courses, Learning Events, People Search, Learning Objects, Admin, and Reports. On the left, there are sections for 'My Bookmarks' and 'My Communities'. At the bottom, there are tabs for 'My Teaching Events' and 'My Learning Events'.

- 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.



The screenshot shows the 'Assessment Tasks' page. At the top, there are navigation tabs: 'Assessment Tasks', 'Tasks Completed on Me', 'My Completed Tasks', 'My Feedback', 'My Learners', and 'Faculty'. Below these is a search and filter section with a search bar, dropdowns for 'Delivery Date', 'Delivery Start', and 'Delivery End', and buttons for 'Apply Filters' and 'Remove Filters'. A green circle with the number '2' is placed over this section. A callout box points to the 'Download PDF(s)' button, stating: '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.' Below the search section is an 'Active Filters' section showing 'Task Status: In Progress'. The main content area is titled 'Assessment Tasks' and shows a task card for 'Psychiatry: Transition to Discipline EPA #2'. The card includes a 'Supervisor Form' button, delivery dates, a progress indicator '01', and a target 'Abe Gross'. A callout box points to the delivery dates, stating: 'This section shows key dates such as delivery, encounter, etc.'. Another callout box points to the progress indicator, stating: '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'. At the bottom of the card, there is a checkbox for downloading as PDF and buttons for 'View Task' and 'Remove Task'. A green circle with the number '3' is placed over these buttons. A callout box points to the checkbox, stating: 'Select to download as PDF. Then click the button in the top right.'

### 2.1.5 EPA Expiry and Email Reminders

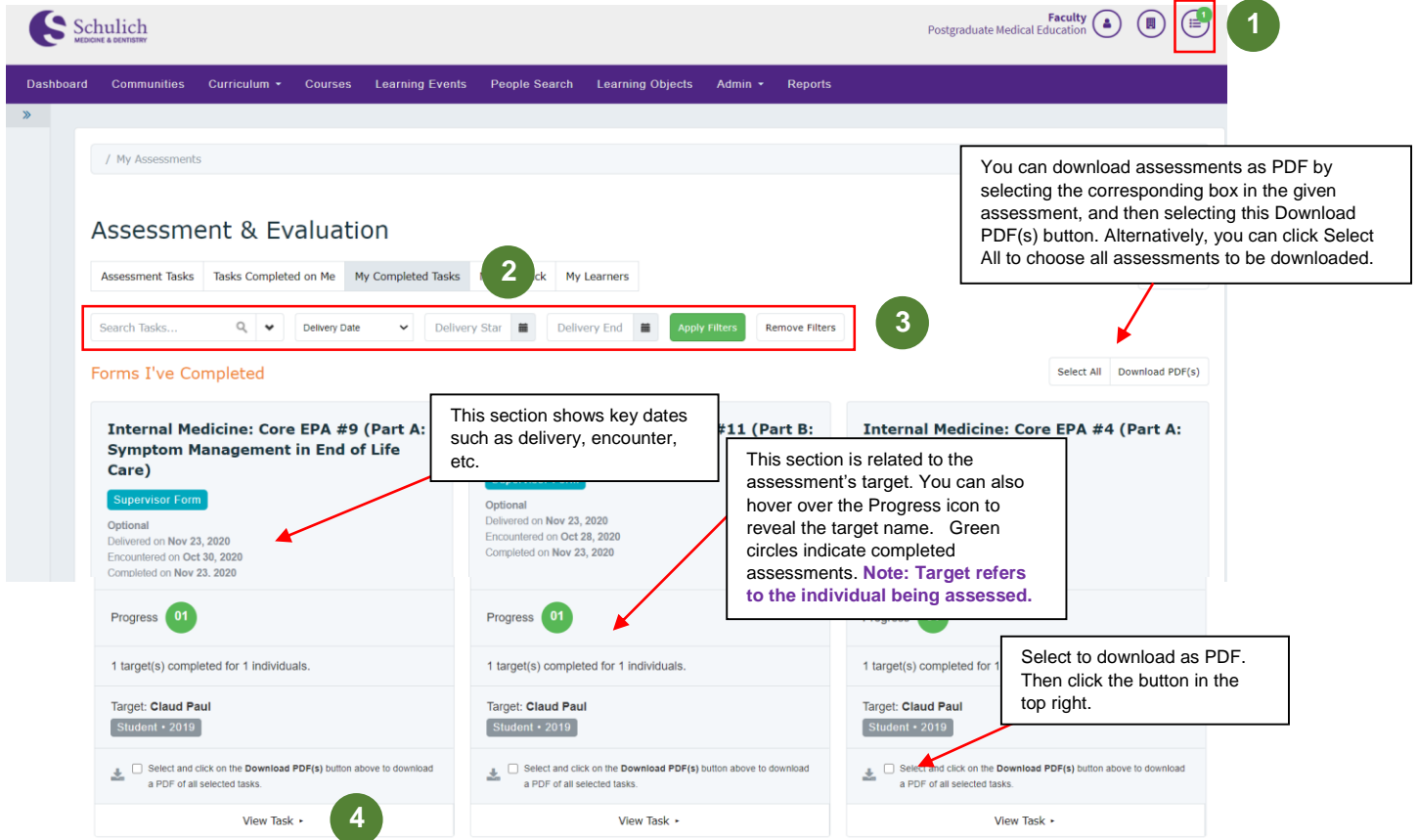
Incomplete EPA assessments will automatically expire 30 days after the initial trigger date. This timeframe will be revisited often to determine an optimal balance between the quality and prioritization of EPA completion with adapting to our new CBME culture.

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

- 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).



The screenshot shows the 'Assessment & Evaluation' page in the Schulich system. The interface includes a navigation menu at the top, a search bar, and a list of completed tasks. Callouts 1 through 4 highlight key features: 1. The Assessment & Evaluation icon in the top right. 2. The 'My Completed Tasks' tab. 3. The filter options (Search Tasks, Delivery Date, Delivery Star, Delivery End, Apply Filters, Remove Filters). 4. The 'View Task' button for a specific assessment.

**1** 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.

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

**3** 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.**

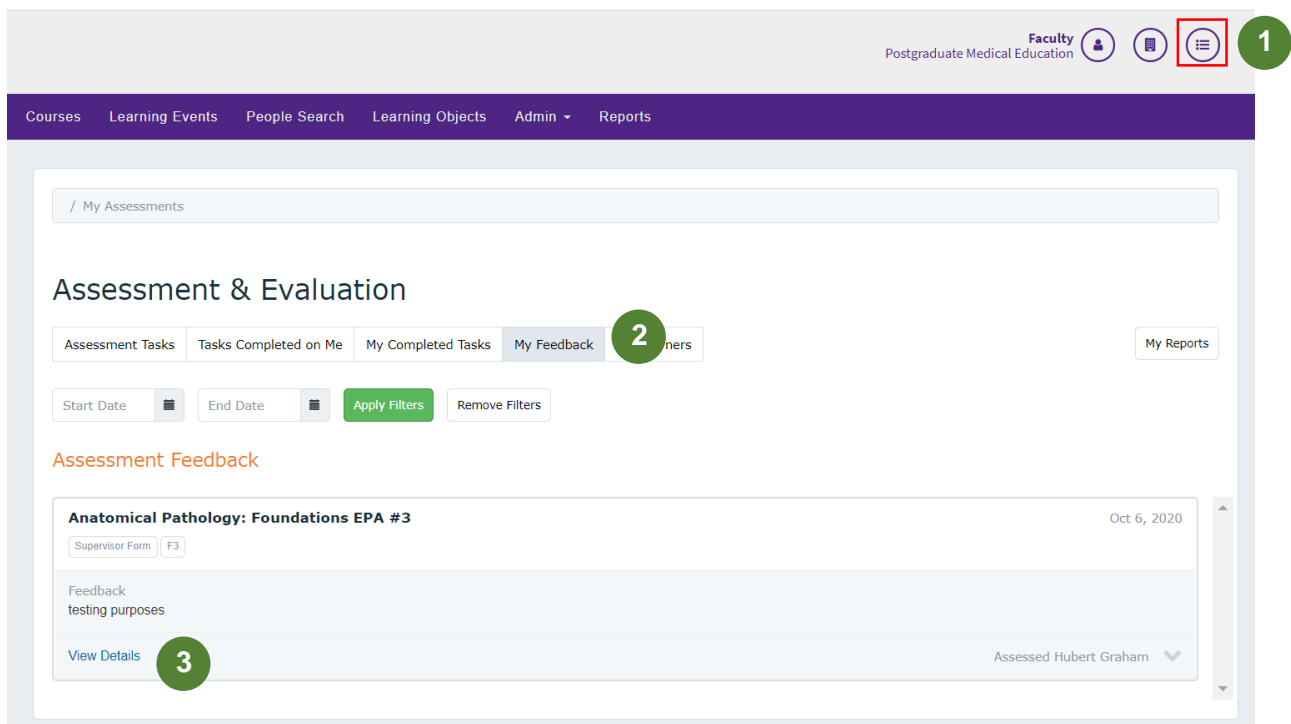
**4** Select to download as PDF. Then click the button in the top right.

## 2.2 VIEWING ASSESSMENT FEEDBACK FROM RESIDENTS

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).



## 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

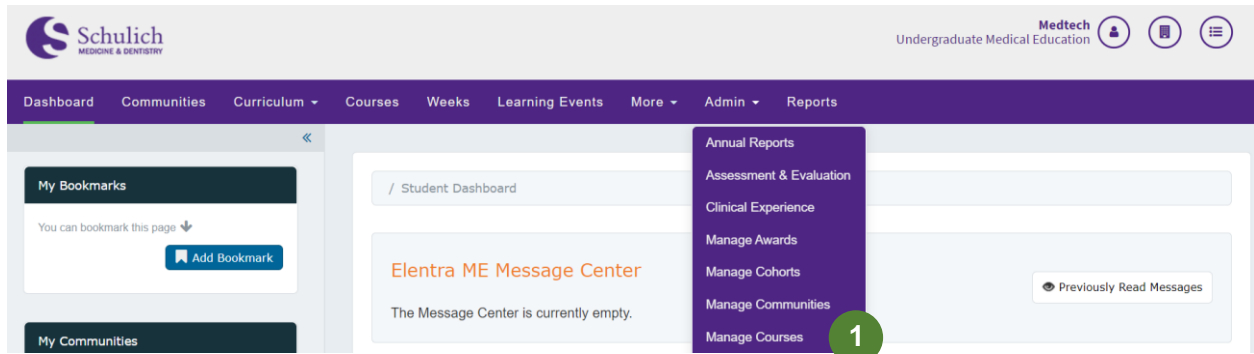
Those with PA or PD access are able to create AA groups. Anyone with a faculty Elentra account is able to be granted this access. PAs/PDs are able to set up these groups by following the instructions in section 3.2 of this guide. If support is required for this set-up, please contact [elentra.support@schulich.uwo.ca](mailto:elentra.support@schulich.uwo.ca).

If you are an AA already, you can proceed to section [3.3](#) of this guide.

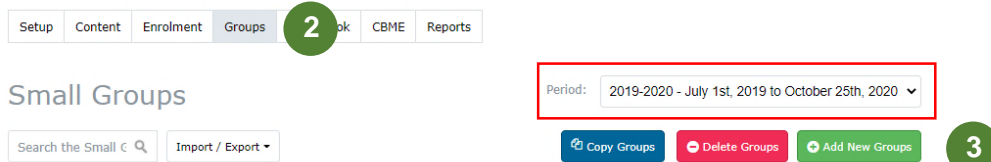
### 3.2 CREATING AA GROUPS

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](#).

### Add Group

Period: 2019-2020 - July 1st, 2019 to October 25th, 2020 ▼

#### Group Details

Group Name Prefix\*

4

The group prefix will be used to automatically create the sequential group names. For example, a group prefix of "Small Group" would result in group names of "Small Group 1", "Small Group 2", "Small Group 3", etc.

Group Type\*  Create  empty groups

5

Automatically populate groups

Cancel

6

Add

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...

7

#### 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.

Select Members\* Search All Members ▼

8

#### Members to be Added on Submission

Cancel

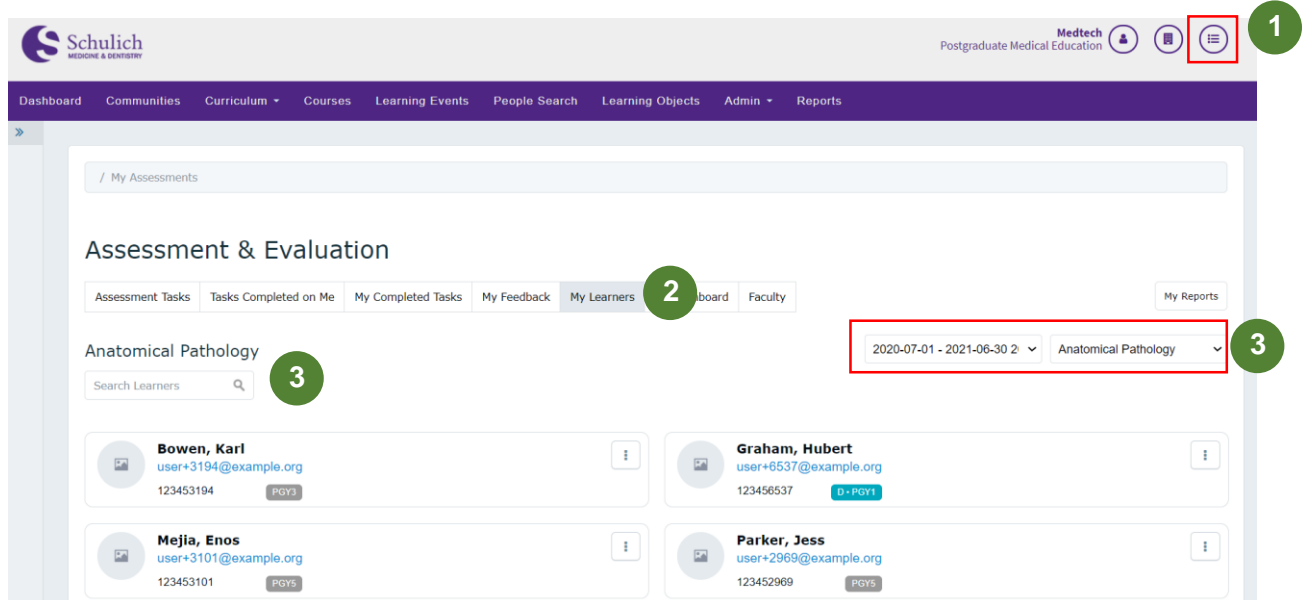
9

Proceed

### 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).



The screenshot shows the 'Assessment & Evaluation' section of the Schulich Medtech system. The 'My Learners' tab is selected. A search bar is visible, and a list of learners is displayed. A red box highlights the date range and program dropdown, and a green circle highlights the 'My Learners' tab.

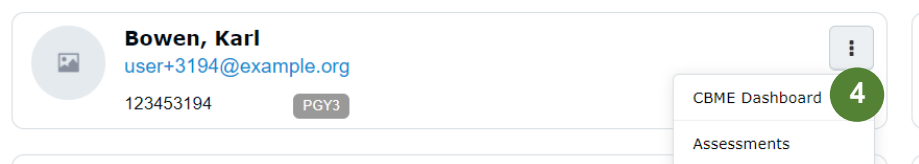
2. After navigating to the My Learners area of Elentra, click on the ellipsis of the learner you wish to view the CBME Dashboard of, and select CBME Dashboard (4).

### Assessment & Evaluation

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

#### Anatomical Pathology

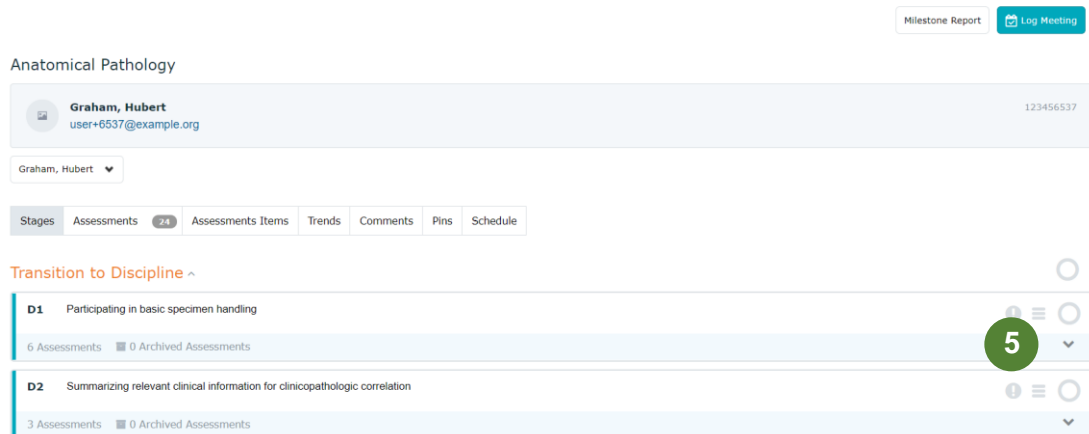
Search Learners



The screenshot shows a learner card for 'Bowen, Karl' with a dropdown menu open. The 'CBME Dashboard' option is highlighted with a green circle.

- 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).

### CBME Dashboard



Milestone Report Log Meeting

Anatomical Pathology

Graham, Hubert  
user+6537@example.org 123456537

Graham, Hubert

Stages Assessments 24 Assessments Items Trends Comments Pins Schedule

Transition to Discipline ^

**D1** Participating in basic specimen handling 5

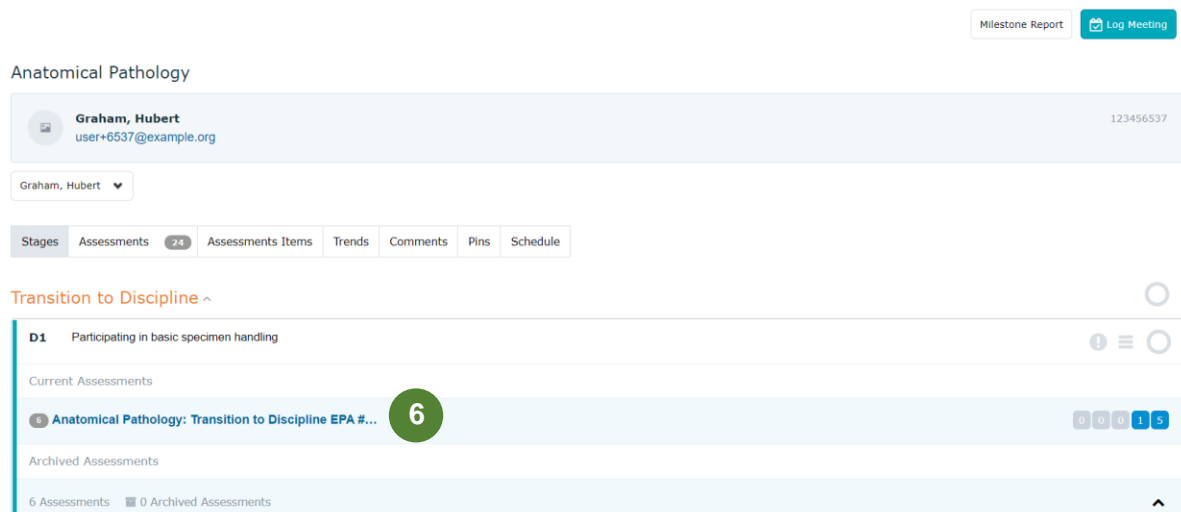
6 Assessments 0 Archived Assessments

**D2** Summarizing relevant clinical information for clinicopathologic correlation

3 Assessments 0 Archived Assessments

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

### CBME Dashboard



Milestone Report Log Meeting

Anatomical Pathology

Graham, Hubert  
user+6537@example.org 123456537

Graham, Hubert

Stages Assessments 24 Assessments Items Trends Comments Pins Schedule

Transition to Discipline ^

**D1** Participating in basic specimen handling

Current Assessments

**6** Anatomical Pathology: Transition to Discipline EPA #...

Archived Assessments

6 Assessments 0 Archived Assessments

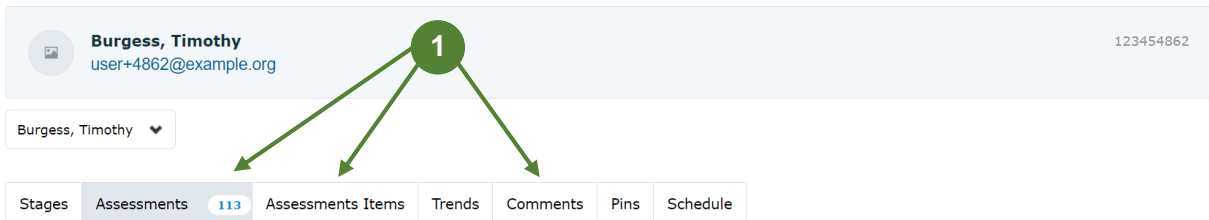
### 3.3.1 Pinning an Assessment

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.

#### CBME Dashboard

Critical Care Medicine



Burgess, Timothy  
user+4862@example.org 123454862

Burgess, Timothy

Stages Assessments **113** Assessments Items Trends Comments Pins Schedule

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).


Completed In Progress Pending Deleted

Completed Assessments

Mark All as Read


**Critical Care Medicine: Foundations EPA #3** Nov 16, 2020

Supervisor Form F3 ★★★★★

View Details Assessed By Charlie Santiago  **2**


**Critical Care Medicine: Foundations EPA #3** Nov 16, 2020

Supervisor Form F3 ★★★★★

View Details Assessed By Charlie Santiago 

**Critical Care Medicine: Core EPA #3** Nov 16, 2020

Supervisor Form C3 ★★★★★

View Details Assessed By Charlie Santiago 

- To view pinned items, scroll back to the CBME Dashboard ribbon and select Pins (3).

## CBME Dashboard

Critical Care Medicine



**Burgess, Timothy**  
user+4862@example.org

123454862

Burgess, Timothy ▾

Stages	Assessments 113	Assessments Items	Trends	Comments	Pins 3	Module
--------	-----------------	-------------------	--------	----------	--------	--------

## 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:

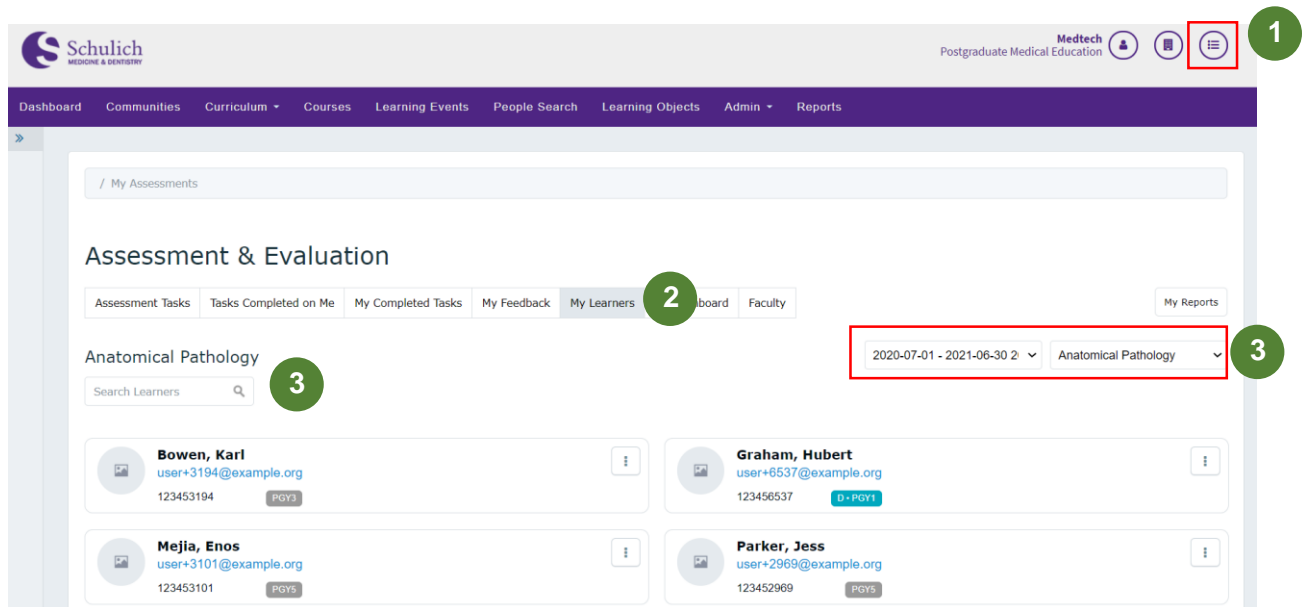
- 4.1 How to Obtain CC Access
- 4.2 Access to Dashboard of All Learners
- 4.3 Marking an EPA or Stage of Training Complete

## 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).

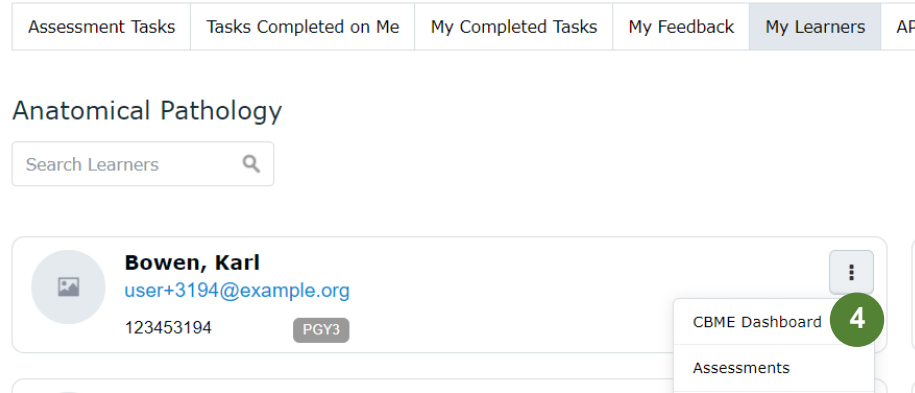


The screenshot shows the Schulich Medtech Postgraduate Medical Education interface. The top right corner features a navigation menu with an icon circled in green and labeled '1'. The main navigation bar includes 'Dashboard', 'Communities', 'Curriculum', 'Courses', 'Learning Events', 'People Search', 'Learning Objects', 'Admin', and 'Reports'. The 'Assessment & Evaluation' section is active, with a sub-menu containing 'Assessment Tasks', 'Tasks Completed on Me', 'My Completed Tasks', 'My Feedback', 'My Learners' (circled in green and labeled '2'), 'My Reports', and 'Faculty'. Below this, the 'Anatomical Pathology' section is visible, with a search bar for learners (circled in green and labeled '3') and a dropdown menu for curriculum periods (2020-07-01 - 2021-06-30 2) and a dropdown menu for the program (Anatomical Pathology, circled in green and labeled '3'). The learner list includes:

Name	Email	ID	Program
Bowen, Karl	user+3194@example.org	123453194	PGY3
Graham, Hubert	user+6537@example.org	123456537	D+PGY1
Mejia, Enos	user+3101@example.org	123453101	PGY3
Parker, Jess	user+2969@example.org	123452969	PGY3

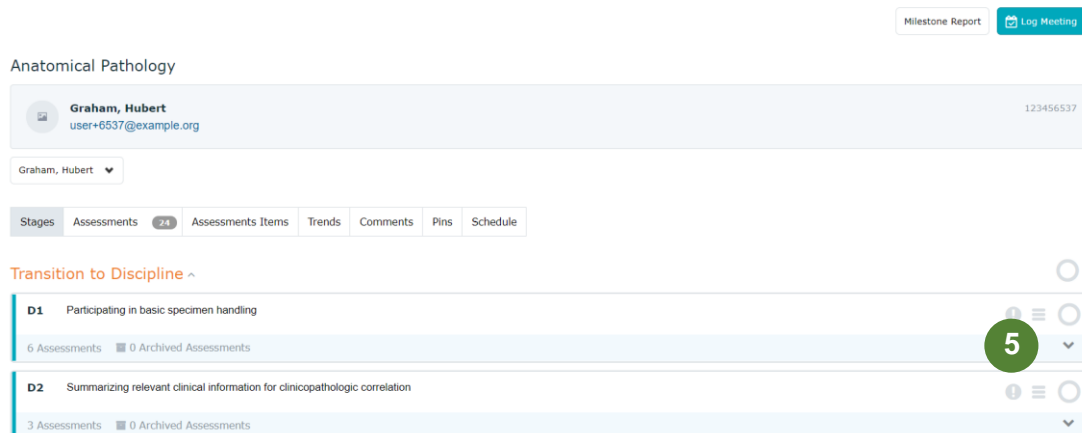
- After navigating to the My Learners area of Elentra, click on the ellipsis of the learner you wish to view the CBME Dashboard of, and select CBME Dashboard (4).

## Assessment & Evaluation



- 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).

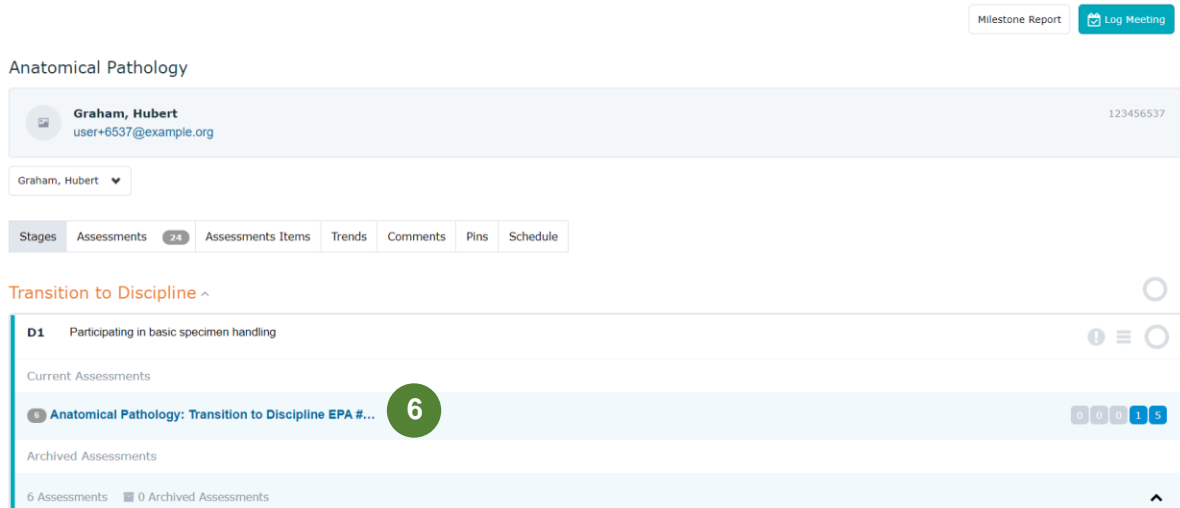
## CBME Dashboard





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

### CBME Dashboard



Milestone Report [Log Meeting](#)

Anatomical Pathology

Graham, Hubert  
user+6537@example.org 123456537

Graham, Hubert

Stages Assessments **2/4** Assessments Items Trends Comments Pins Schedule

Transition to Discipline ^

D1 Participating in basic specimen handling

Current Assessments

**6** Anatomical Pathology: Transition to Discipline EPA #...

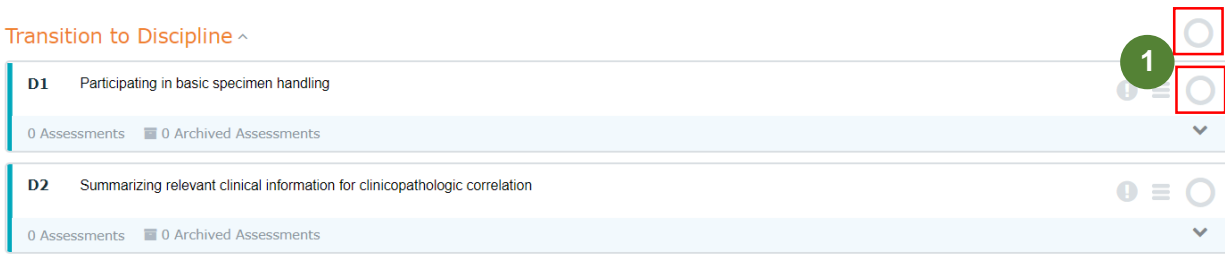
Archived Assessments

6 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:

- Clicking on the circle (1) of the corresponding EPA or stage of training you wish to indicate as complete.



Transition to Discipline ^

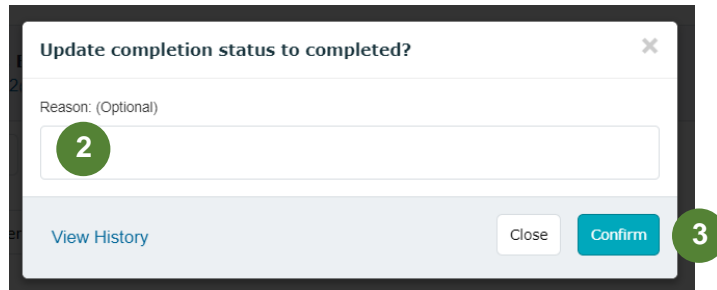
D1 Participating in basic specimen handling

0 Assessments 0 Archived Assessments

D2 Summarizing relevant clinical information for clinicopathologic correlation

0 Assessments 0 Archived Assessments

- You can then enter an optional reasoning (2) and click Confirm (3).



A dialog box titled "Update completion status to completed?". It features a text input field labeled "Reason: (Optional)" with a green circle containing the number "2" overlaid on it. At the bottom, there are three buttons: "View History" (blue text), "Close" (white text on a light grey button), and "Confirm" (white text on a blue button). A green circle containing the number "3" is overlaid on the "Confirm" button.

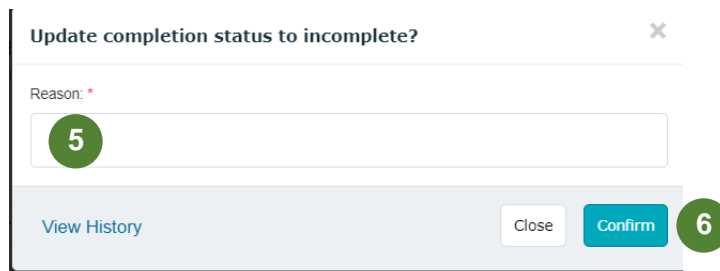
- If you wish to uncheck an EPA or stage of training, you can do so in the same method by clicking on the checkmark (4).

### Transition to Discipline ^



The interface shows two rows of training items. The first row is for "D1 Performing initial assessments for uncomplicated obstetric patients" and the second is for "D2 Performing an initial assessment of uncomplicated gynecologic patients". Each row includes a status bar with "5 Assessments" and "0 Archived Assessments", and a set of icons: an exclamation mark, a hamburger menu, and a checkmark. A green circle with the number "4" is overlaid on the checkmark icon of the first row. A green checkmark icon is also visible at the top right of the section.

- You will then be asked to enter a mandatory reason (5) then select Confirm (6).



A dialog box titled "Update completion status to incomplete?". It features a text input field labeled "Reason: \*" with a red asterisk indicating a mandatory field. A green circle containing the number "5" is overlaid on the input field. At the bottom, there are three buttons: "View History" (blue text), "Close" (white text on a light grey button), and "Confirm" (white text on a blue button). A green circle containing the number "6" is overlaid on the "Confirm" button.

## 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](mailto: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

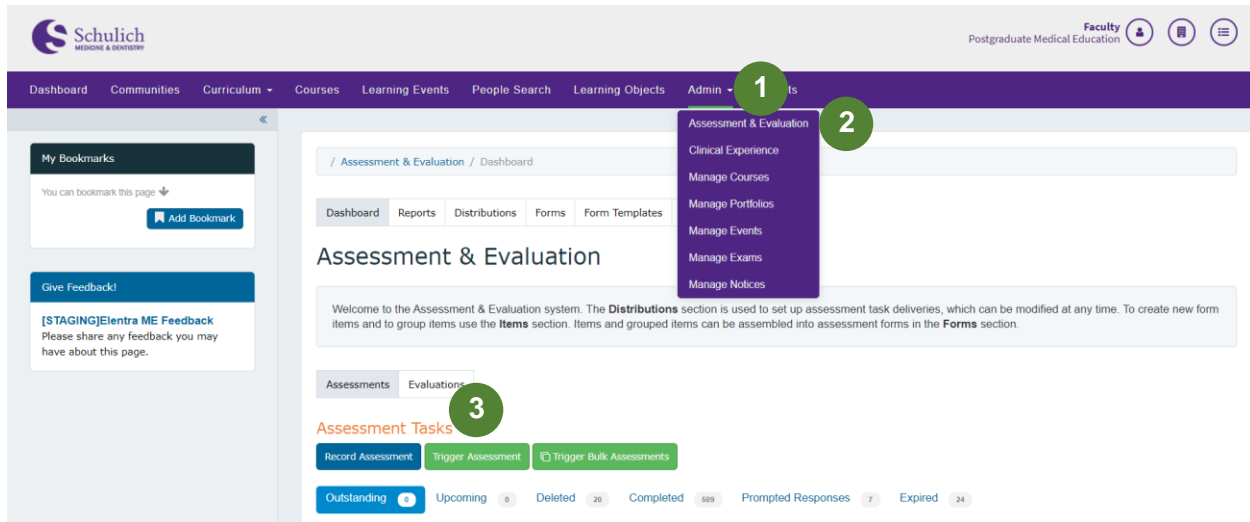
### 5.2 Accessing My Faculty Tab

## 5.1 EPA ASSESSMENTS

### 5.1.1 Triggering Assessments on Behalf of Others

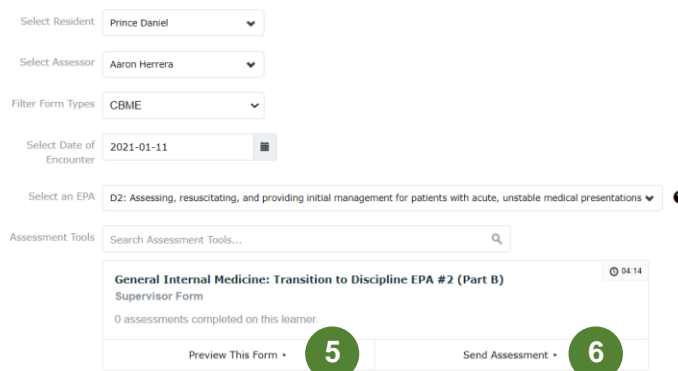
An assessment can be triggered for any program's resident and assessor by both Program Directors and/or Program Administrators.

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).

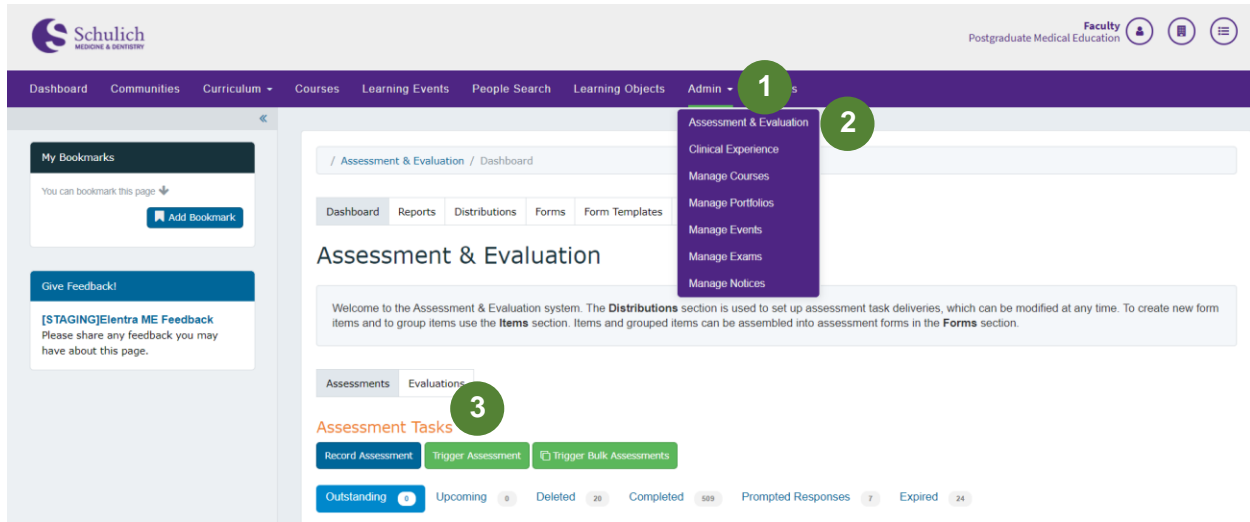
#### Assessment Tools



## 5.1.2 Triggering Assessments to External Assessors

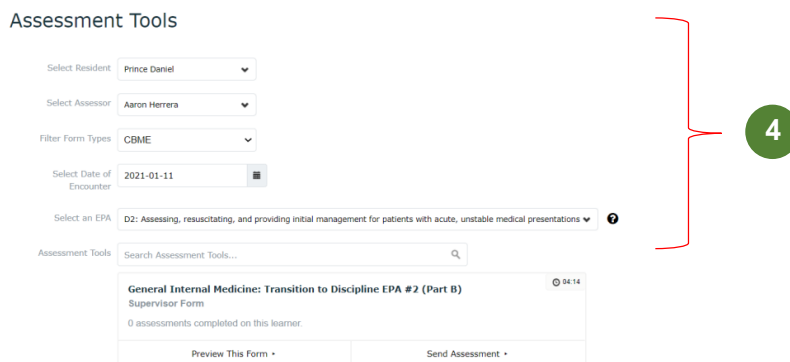
To trigger to an external assessor, the steps are similar to those in [5.1.1](#), however an extra step is required when selecting the assessor.

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



The screenshot shows the Schulich Assessment & Evaluation dashboard. The navigation menu at the top includes 'Admin' (1). A dropdown menu is open under 'Admin', with 'Assessment & Evaluation' (2) selected. Below this, the 'Assessment & Evaluation' section is visible, featuring a 'Trigger Assessment' button (3) among other options like 'Record Assessment' and 'Trigger Bulk Assessments'. The dashboard also displays various statistics and filters for assessment tasks.

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.



The 'Assessment Tools' form contains several input fields: 'Select Resident' (Prince Daniel), 'Select Assessor' (Aaron Herrera), 'Filter Form Types' (CBME), and 'Select Date of Encounter' (2021-01-11). Below these is a dropdown for 'Select an EPA' (D2: Assessing, resuscitating, and providing initial management for patients with acute, unstable medical presentations). A search bar for 'Assessment Tools' is also present. A red bracket on the right side of the form groups the first four fields, with a green circle containing the number '4' next to it.

- 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](mailto: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.

Select Resident: Prince Daniel

Select Assessor: Click here to select an assessor

External Assessor: Begin typing to search... [Add Assessor] [Cancel]

Filter Form Types: Filtering Items by Assessor

- Aaron Burns
- Aaron Dixon
- Aaron Herrera
- Aaron Johnston
- Aaron Lawrence
- Aaron Long
- Aaron Paul
- Aaron Potter
- Aaron Valdez

Select Date of Encounter: [Date Picker]

Select an EPA: [Dropdown]

External Assessor **5**

- 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

Select Resident: Prince Daniel

Select Assessor: Click here to select an assessor

External Assessor: First Name Last Name Email Address [Add Assessor] [Cancel] **6**

Filter Form Types: CBME

Select Date of Encounter: 2021-01-11

Select an EPA: D2: Assessing, resuscitating, and providing initial management for patients with acute, unstable medical presentations

Assessment Tools: Search Assessment Tools...

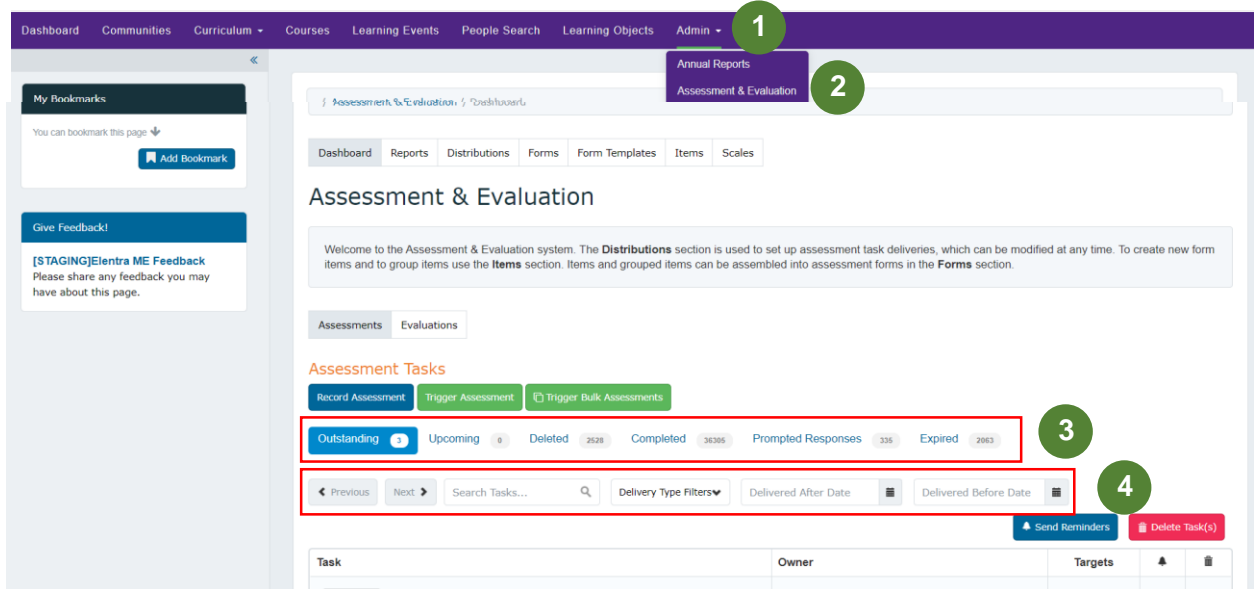
**General Internal Medicine: Transition to Discipline EPA #2 (Part B)** 04:14  
Supervisor Form  
0 assessments completed on this learner.

Preview This Form • Send Assessment • **7**

### 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:

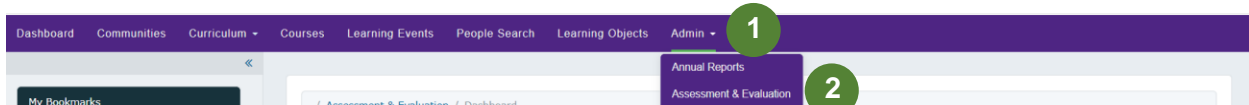
1. Click on Admin (1) then Assessment & Evaluation (2). You can then use the various filters (3) to sort the EPAs by outstanding, deleted, completed, prompted responses, or expired. Additionally, you can filter further by using the search bar and delivery type filters (4).



### 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.



- 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)**.



### Assessment Tasks

Record Assessment Trigger Assessment Trigger Bulk Assessments

Outstanding **3** Upcoming **0** Deleted **2528** Completed **36305** Prompted Responses **335** Expired **2063**

← Previous Next → Search Tasks... Delivery Type Filters Delivered After Date Delivered Before Date

**4** Send Reminders Delete Task(s)

Task	Owner	Targets		
Assessment 2020-12-09 Psychiatry: Foundations EPA #2	Sanford Adams	1	<input checked="" type="checkbox"/>	<b>3</b>
Assessment 2020-12-06 Internal Medicine: Foundations EPA #2 (Part A: Patient Assessment and Management) [updated]	Daniyal Abdali	1	<input type="checkbox"/>	<input type="checkbox"/>
Assessment 2020-12-05 Urology: Core EPA #13 Part A	Alvaro Ramirez	1	<input type="checkbox"/>	<input type="checkbox"/>

- A popup will then appear for your review. Select Confirm Reminders **(5)** to proceed.

**Send Reminders** ✕

A reminder will be sent for the following assessor(s):

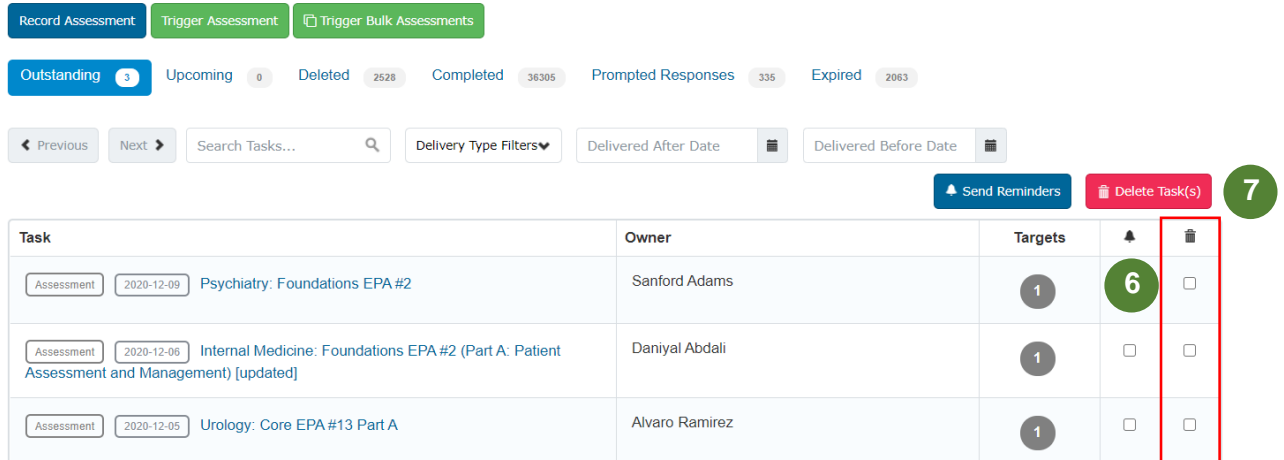
Assessor Name	Number of Notifications
Sanford Adams	1

**5**



- 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).

### Assessment Tasks



Record Assessment Trigger Assessment Trigger Bulk Assessments

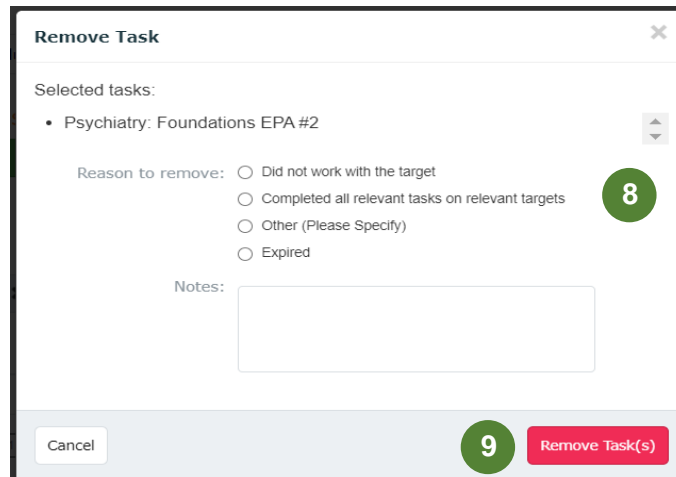
Outstanding 3 Upcoming 0 Deleted 2528 Completed 36305 Prompted Responses 335 Expired 2063

Previous Next Search Tasks... Delivery Type Filters Delivered After Date Delivered Before Date

Send Reminders Delete Task(s) 7

Task	Owner	Targets		
Assessment 2020-12-09 Psychiatry: Foundations EPA #2	Sanford Adams	1	6	<input type="checkbox"/>
Assessment 2020-12-06 Internal Medicine: Foundations EPA #2 (Part A: Patient Assessment and Management) [updated]	Daniyal Abdali	1	<input type="checkbox"/>	<input type="checkbox"/>
Assessment 2020-12-05 Urology: Core EPA #13 Part A	Alvaro Ramirez	1	<input type="checkbox"/>	<input type="checkbox"/>

- 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.



Remove Task

Selected tasks:

- Psychiatry: Foundations EPA #2

Reason to remove:

Did not work with the target

Completed all relevant tasks on relevant targets 8

Other (Please Specify)

Expired

Notes:

Cancel 9 Remove Task(s)

### 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.

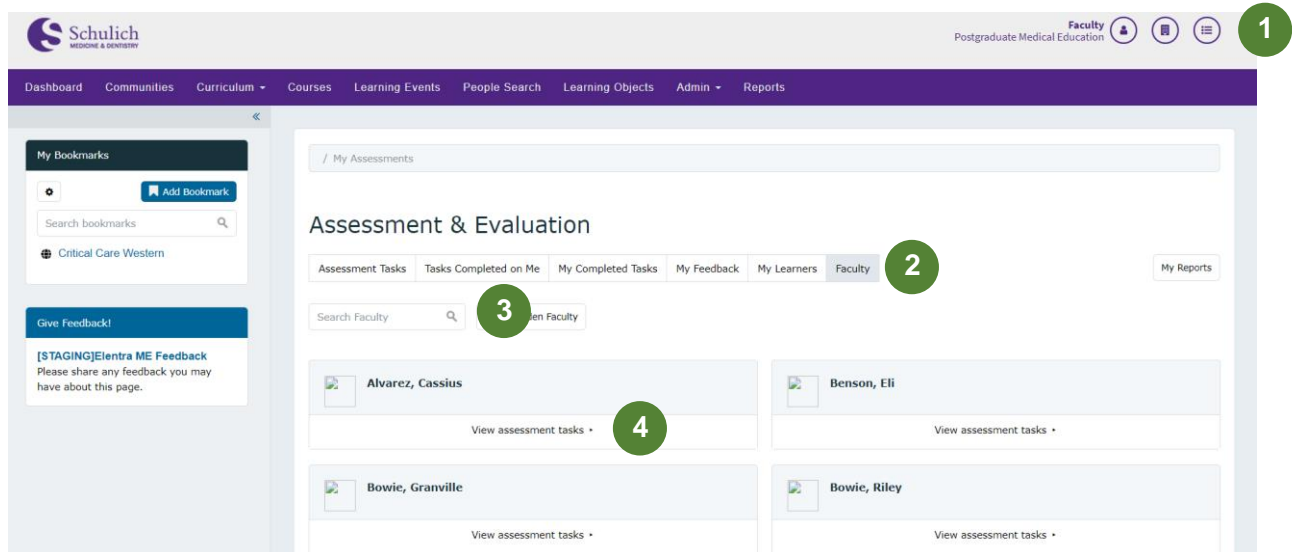
Concerns
<p>▶ Do you have patient safety concerns related to this resident's performance?</p> <p>No</p>
<p>▶ Do you have professionalism concerns about this resident's performance?</p> <p>No</p>
<p>▼ Are there other reasons to flag this assessment?</p> <p>No</p>
<p><input checked="" type="checkbox"/> No</p> <p><input type="checkbox"/> Yes</p>

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.

## 5.2 ACCESSING MY FACULTY TAB

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).



The screenshot displays the Schulich Postgraduate Medical Education interface. The top navigation bar includes 'Dashboard', 'Communities', 'Curriculum', 'Courses', 'Learning Events', 'People Search', 'Learning Objects', 'Admin', and 'Reports'. The 'Faculty' tab is highlighted in the top right corner (1). The main content area is titled 'Assessment & Evaluation' and features a tabbed interface with 'Assessment Tasks', 'Tasks Completed on Me', 'My Completed Tasks', 'My Feedback', 'My Learners', and 'Faculty' (2). A search bar labeled 'Search Faculty' (3) is present. Below the search bar, four faculty members are listed: Alvarez, Cassius; Benson, Eii; Bowie, Granville; and Bowie, Riley. Each entry includes a 'View assessment tasks' link (4).

- 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).

## Cassius Alvarez's Assessments

Current Tasks
Completed Tasks
5 Pending Tasks
Tasks Completed on Faculty

Search Tasks...

Delivery Date

Delivery Star

Delivery End

Apply Filters

Remove Filters

Cassius Alvarez's Forms Completed

Select All

Download PDF(s)

7

**Critical Care Medicine: Core EPA #3**

Supervisor Form

Optional  
Delivered on Dec 4, 2020  
Encountered on Dec 3, 2020  
Completed on Dec 4, 2020

Progress 01

1 target(s) completed for 1 individuals.

Target: **Don Park**

Student • 2020

Select and click on the **Download PDF(s)** button above to download a PDF of all selected tasks.

View Task ▾

**Critical Care Medicine: Core EPA #3**

Supervisor Form

Optional  
Delivered on Dec 4, 2020  
Encountered on Dec 3, 2020  
Completed on Dec 4, 2020

Progress 01

1 target(s) completed for 1 individuals.

Target: **Don Park**

Student • 2020

Select and click on the **Download PDF(s)** button above to download a PDF of all selected tasks.

View Task ▾

**Critical Care Medicine: Core EPA #2**

Supervisor Form

Optional  
Delivered on Dec 4, 2020  
Encountered on Dec 3, 2020  
Completed on Dec 4, 2020

Progress 01

1 target(s) completed for 1 individuals.

Target: **Don Park**

Student • 2020

Select and click on the **Download PDF(s)** button above to download a PDF of all selected tasks.

View Task ▾

6

## 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.

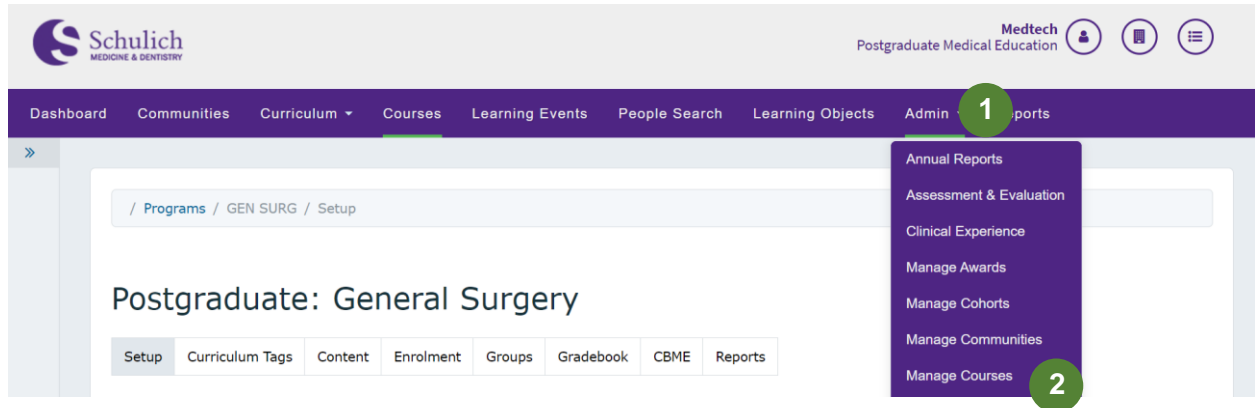
The topics discussed in this section include:

- 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 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

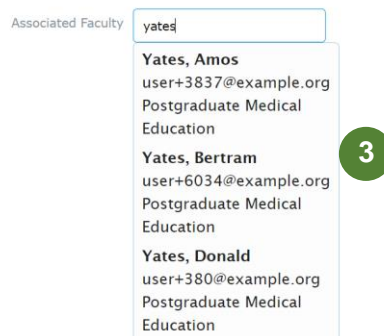
The course setup is where you can view and adjust the associated faculty of your program. Here is also where you can update members of your program's Competence Committee.

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).

Ross, Reuben ✕  
Ryan, Emil ✕  
Stevens, Orlando ✕  
Stewart, Wilford ✕  
Terry, Fredrick ✕  
Vedder, Roland ✕  
Walters, Bryant ✕ **4**  
Yates, Fay ✕

Competency Committee Members

Barnett, Elias ✕  
Barnett, Isaac ✕

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

### Course Syllabus

Automatic Generation  Enabled  
 Disabled

Cancel

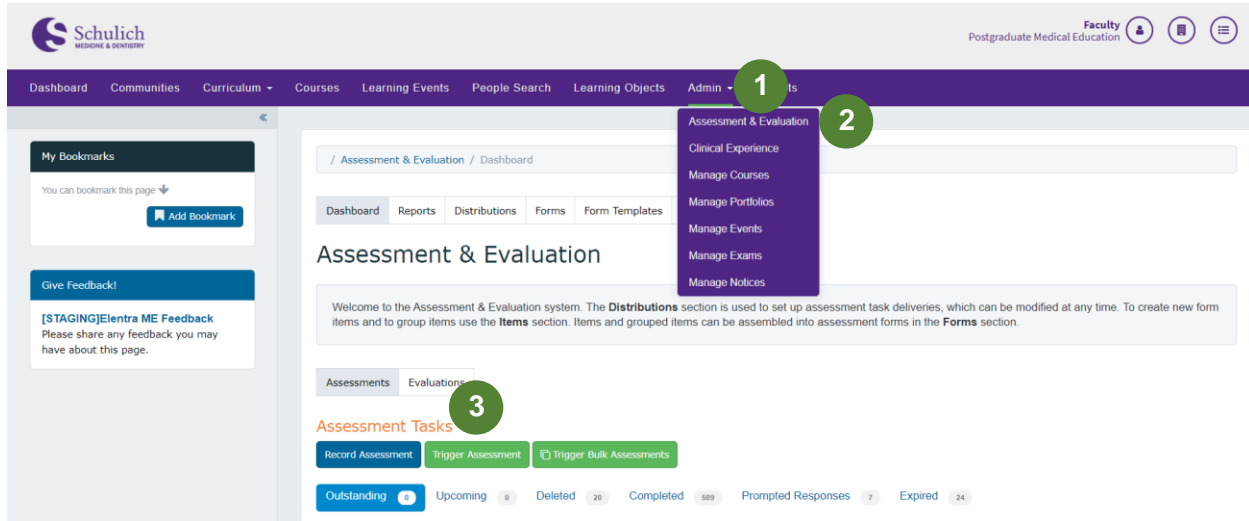
**5** Save

## 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.

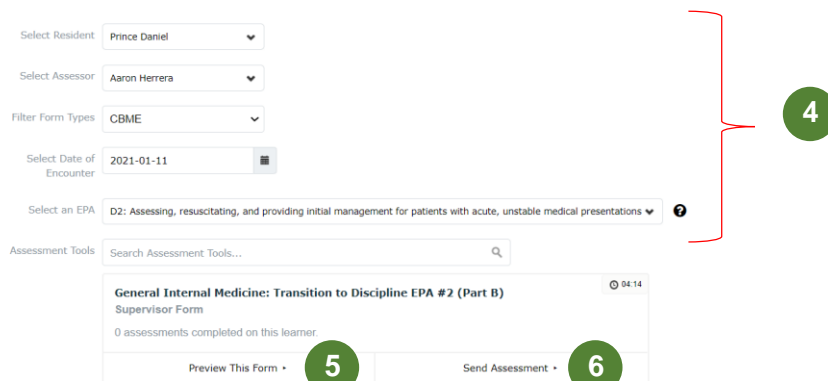
1. Click on Admin (1) then Assessment & Evaluation (2). Click on Trigger Assessment (3).



The screenshot shows the Schulich Assessment & Evaluation system interface. The top navigation bar includes 'Admin' (1) and 'Assessment & Evaluation' (2). The 'Assessment & Evaluation' dropdown menu is open, showing options like 'Clinical Experience', 'Manage Courses', and 'Trigger Assessment'. The 'Trigger Assessment' button is highlighted with a green circle (3). The main content area shows 'Assessment Tasks' with buttons for 'Record Assessment', 'Trigger Assessment', and 'Trigger Bulk Assessments'. A status bar at the bottom shows 'Outstanding' (1), 'Upcoming' (3), 'Deleted' (20), 'Completed' (503), 'Prompted Responses' (7), and 'Expired' (24).

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).

#### Assessment Tools



The 'Assessment Tools' form contains the following fields and options:

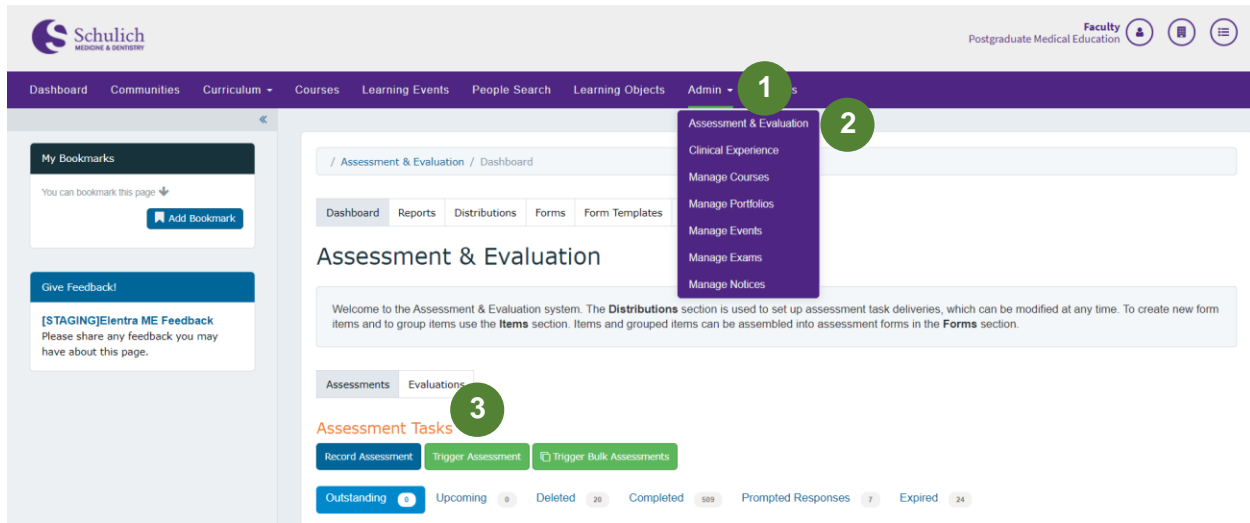
- Select Resident: Prince Daniel
- Select Assessor: Aaron Herrera
- Filter Form Types: CBME
- Select Date of Encounter: 2021-01-11
- Select an EPA: D2: Assessing, resuscitating, and providing initial management for patients with acute, unstable medical presentations
- Assessment Tools: Search Assessment Tools...
- Result: General Internal Medicine: Transition to Discipline EPA #2 (Part B) Supervisor Form (0 assessments completed on this learner)
- Buttons: Preview This Form (5), Send Assessment (6)



## 6.2.2 Triggering Assessments to External Assessors

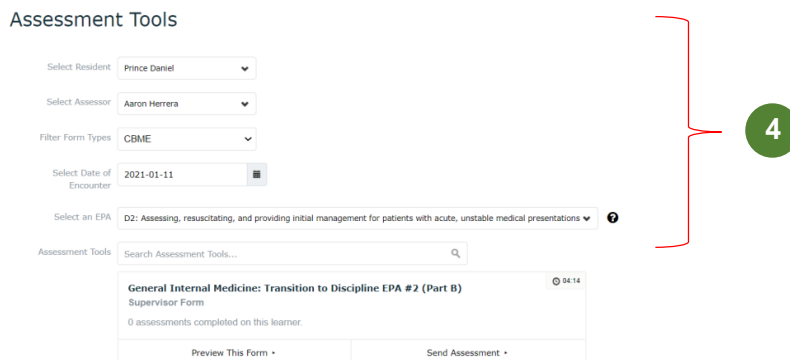
To trigger to an external assessor, the steps are similar to those in [6.2.1](#), however an extra step is required when selecting the assessor.

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



The screenshot shows the Schulich Assessment & Evaluation dashboard. The 'Admin' menu is open, and 'Assessment & Evaluation' is selected. The 'Trigger Assessment' button is highlighted under 'Assessment Tasks'.

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.



The screenshot shows the 'Assessment Tools' form. The form includes fields for 'Select Resident', 'Select Assessor', 'Filter Form Types', 'Select Date of Encounter', and 'Select an EPA'. A red bracket highlights the 'Select an EPA' field and the 'Assessment Tools' list.

- 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](mailto: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.

Select Resident: Prince Daniel

Select Assessor: Click here to select an assessor

External Assessor: Begin typing to search...

Filter Form Types:  Aaron Burns  
 Aaron Dixon  
 Aaron Herrera  
 Aaron Johnston  
 Aaron Lawrence  
 Aaron Long  
 Aaron Paul  
 Aaron Potter  
 Aaron Valdez

Select Date of Encounter: [Calendar icon]

Select an EPA: [Dropdown menu]

External Assessor **5**

- 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

Select Resident: Prince Daniel

Select Assessor: Click here to select an assessor

External Assessor: First Name Last Name Email Address   **6**

Filter Form Types: CBME

Select Date of Encounter: 2021-01-11

Select an EPA: D2: Assessing, resuscitating, and providing initial management for patients with acute, unstable medical presentations

Assessment Tools: Search Assessment Tools...

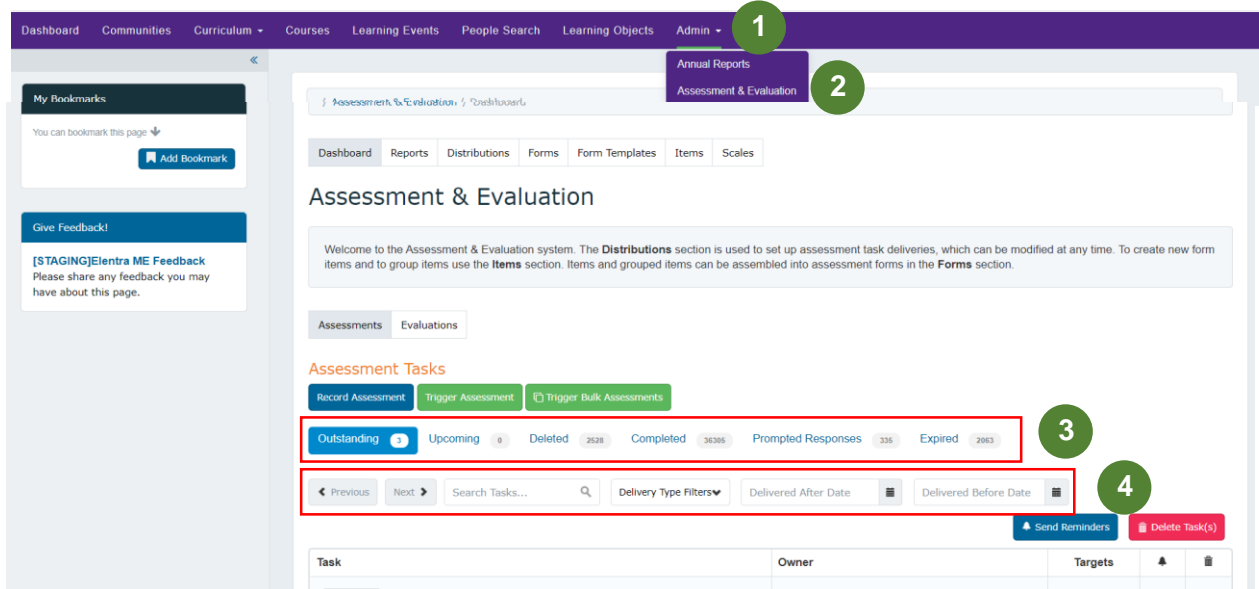
**General Internal Medicine: Transition to Discipline EPA #2 (Part B)** 04:14  
 Supervisor Form  
 0 assessments completed on this learner.

Preview This Form •  **7**

### 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:

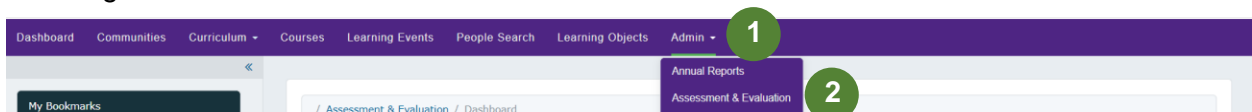
1. Click on Admin (1) then Assessment & Evaluation (2). You can then use the various filters (3) to sort the EPAs by outstanding, deleted, completed, prompted responses, or expired. Additionally, you can also use filter further by using the search bar and delivery type filters (4).



### 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.



- 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)**.



### Assessment Tasks

Record Assessment Trigger Assessment Trigger Bulk Assessments

Outstanding **3** Upcoming **0** Deleted **2528** Completed **36305** Prompted Responses **335** Expired **2063**

← Previous Next → Search Tasks... Delivery Type Filters Delivered After Date Delivered Before Date

**4** Send Reminders Delete Task(s)

Task	Owner	Targets		
Assessment 2020-12-09 Psychiatry: Foundations EPA #2	Sanford Adams	1	<input checked="" type="checkbox"/>	<b>3</b>
Assessment 2020-12-06 Internal Medicine: Foundations EPA #2 (Part A: Patient Assessment and Management) [updated]	Daniyal Abdali	1	<input type="checkbox"/>	<input type="checkbox"/>
Assessment 2020-12-05 Urology: Core EPA #13 Part A	Alvaro Ramirez	1	<input type="checkbox"/>	<input type="checkbox"/>

- A popup will then appear for your review. Select Confirm Reminders **(5)** to proceed.

**Send Reminders** ✕

A reminder will be sent for the following assessor(s):

Assessor Name	Number of Notifications
Sanford Adams	1

**5**

- 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).

### Assessment Tasks

Record Assessment Trigger Assessment Trigger Bulk Assessments

Outstanding 3 Upcoming 0 Deleted 2528 Completed 38305 Prompted Responses 335 Expired 2063

Previous Next Search Tasks... Delivery Type Filters Delivered After Date Delivered Before Date

Send Reminders Delete Task(s) 7

Task	Owner	Targets		
Assessment 2020-12-09 Psychiatry: Foundations EPA #2	Sanford Adams	1	6	<input type="checkbox"/>
Assessment 2020-12-06 Internal Medicine: Foundations EPA #2 (Part A: Patient Assessment and Management) [updated]	Daniyal Abdali	1	<input type="checkbox"/>	<input type="checkbox"/>
Assessment 2020-12-05 Urology: Core EPA #13 Part A	Alvaro Ramirez	1	<input type="checkbox"/>	<input type="checkbox"/>

- 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.

**Remove Task** ✕

Selected tasks:

- Psychiatry: Foundations EPA #2

Reason to remove:

Did not work with the target  
 Completed all relevant tasks on relevant targets 8  
 Other (Please Specify)  
 Expired

Notes:

9

### 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.

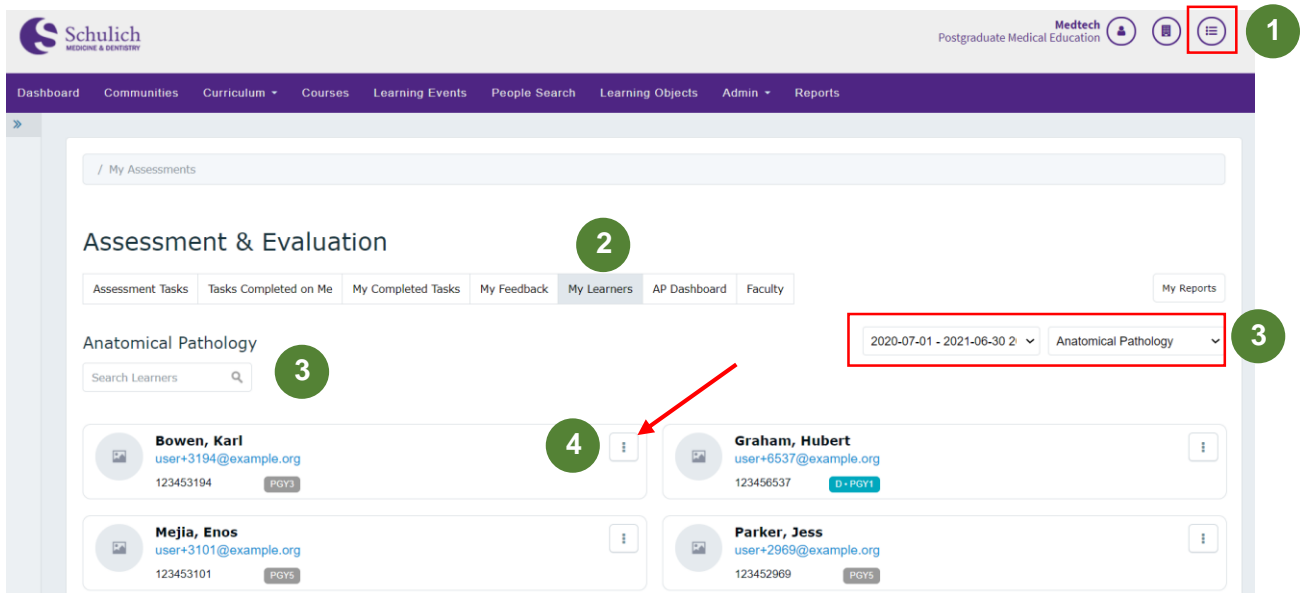
Concerns
<p>▶ Do you have patient safety concerns related to this resident's performance?</p> <p>No</p>
<p>▶ Do you have professionalism concerns about this resident's performance?</p> <p>No</p>
<p>▼ Are there other reasons to flag this assessment?</p> <p>No</p>
<p><input checked="" type="checkbox"/> No</p> <p>Yes</p>

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.

## 6.3 ACCESSING MY LEARNERS TAB

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.



The screenshot shows the 'My Assessments' page in the Schulich Medtech system. The top navigation bar includes 'Dashboard', 'Communities', 'Curriculum', 'Courses', 'Learning Events', 'People Search', 'Learning Objects', 'Admin', and 'Reports'. The 'Assessment & Evaluation' section is active, with a sub-tab for 'My Learners'. Below this, the 'Anatomical Pathology' section is visible, featuring a search bar and dropdown menus for curriculum period (2020-07-01 - 2021-06-30 2) and program (Anatomical Pathology). A list of learners is displayed, including Karl Bowen, Hubert Graham, Enos Mejia, and Jess Parker. A red arrow points to the ellipsis menu icon next to Karl Bowen's name, which is labeled with a green circle '4'.

### 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	<b>My Learners</b>	AP
------------------	-----------------------	--------------------	-------------	--------------------	----

### Anatomical Pathology



**Bowen, Karl**

user+3194@example.org

123453194 PGY3

⋮

CBME Dashboard 1


Assessments

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).

### CBME Dashboard

[Milestone Report](#)
[Log Meeting](#)

#### Anatomical Pathology



**Graham, Hubert**

user+6537@example.org

123456537

Graham, Hubert ▾

Stages

Assessments 24

Assessments Items

Trends

Comments

Pins

Schedule

Transition to Discipline ^

D1

Participating in basic specimen handling

⋮

6 Assessments 0 Archived Assessments

D2


Summarizing relevant clinical information for clinicopathologic correlation

⋮

3 Assessments 0 Archived Assessments

Last updated: 2021-04-07

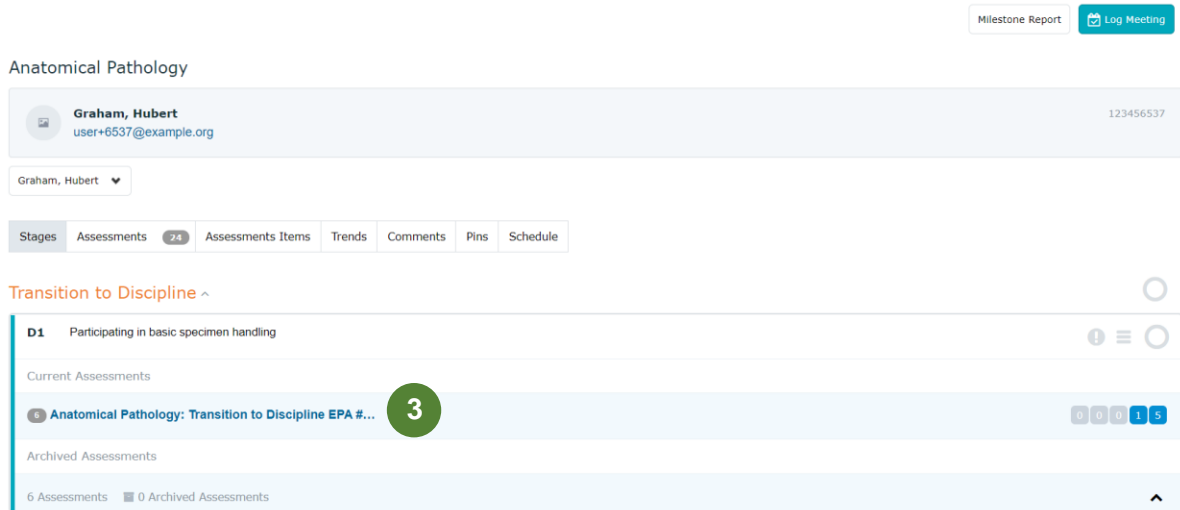
56





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

### CBME Dashboard



Milestone Report [Log Meeting](#)

Anatomical Pathology

**Graham, Hubert**  
user+6537@example.org 123456537

Graham, Hubert

Stages Assessments 2/4 Assessments Items Trends Comments Pins Schedule

Transition to Discipline ^

D1 Participating in basic specimen handling

Current Assessments

Anatomical Pathology: Transition to Discipline EPA #... 3

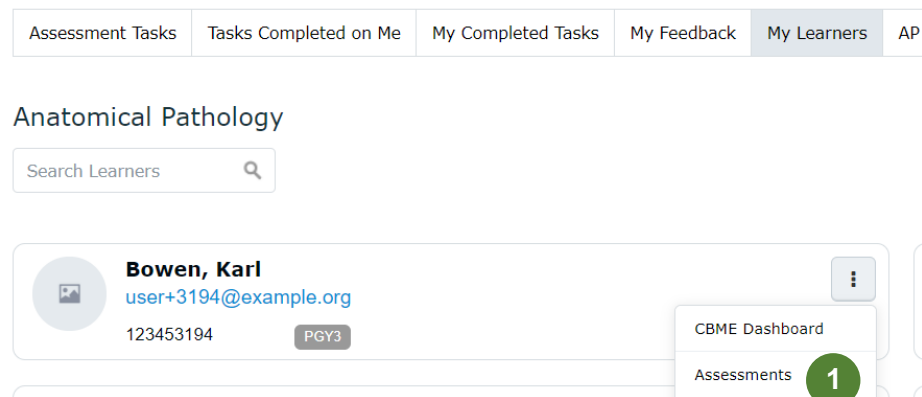
Archived Assessments

6 Assessments 0 Archived Assessments

### 6.3.2 My Learner Assessments

- 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).

### 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

Assessments 1

- 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).

### Hubert Graham's Assessments

Tasks Completed on Learner
Pending Tasks on Learner
Upcoming Tasks on Learner
Learner's Current Tasks
Learner's Upcoming Tasks

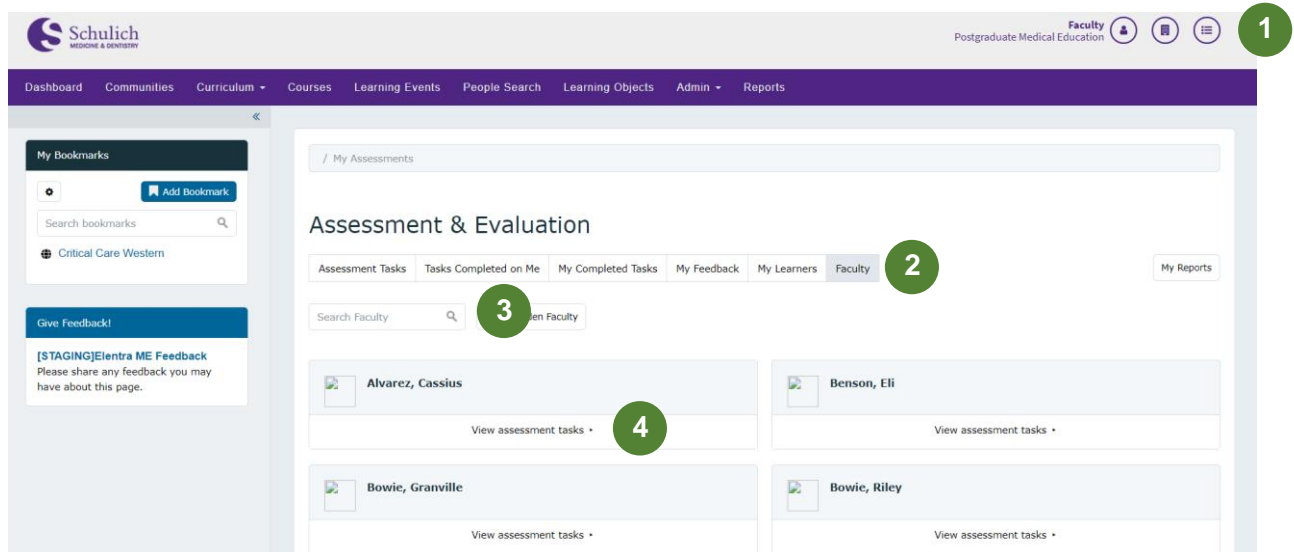
Tasks Completed on Hubert Graham

Anatomical Pathology: Foundations EPA #3	Anatomical Pathology: Foundations EPA #3	Anatomical Pathology: Foundations EPA #3
<p><b>Supervisor Form</b></p> <p>Optional Visible to target Delivered on Nov 16, 2020 Encountered on Nov 8, 2020 Expires on Dec 16, 2020 Completed on Nov 20, 2020</p> <hr/> <p>Target: <b>Hubert Graham</b> Student • 2020</p> <hr/> <p>Assessor: <b>Giles Ball</b> Student • 2019</p> <hr/> <p><input type="checkbox"/> Select and click on the <b>Download PDF(s)</b> button above to download a PDF of all selected tasks.</p> <p style="text-align: right;">View Task • <span style="border: 1px solid green; border-radius: 50%; padding: 2px 5px; font-weight: bold;">4</span></p>	<p><b>Supervisor Form</b></p> <p>✓ Seen By Target on Nov 16, 2020</p> <p>Optional Visible to target Delivered on Nov 2, 2020 Encountered on Nov 1, 2020 Expires on Dec 2, 2020 Completed on Nov 4, 2020</p> <hr/> <p>Target: <b>Hubert Graham</b> Student • 2020</p> <hr/> <p>Assessor: <b>Marcus Sherman</b> Faculty • Lecturer</p> <hr/> <p><input type="checkbox"/> Select and click on the <b>Download PDF(s)</b> button above to download a PDF of all selected tasks.</p> <p style="text-align: right;">View Task •</p>	<p><b>Supervisor Form</b></p> <p>Optional Visible to target Delivered on Oct 19, 2020 Encountered on Oct 12, 2020 Completed on Oct 19, 2020</p> <hr/> <p>Target: <b>Hubert Graham</b> Student • 2020</p> <hr/> <p>Assessor: <b>Warren Lewis</b> Faculty • Lecturer</p> <hr/> <p><input type="checkbox"/> Select and click on the <b>Download PDF(s)</b> button above to download a PDF of all selected tasks.</p> <p style="text-align: right;">View Task •</p>

## 6.4 ACCESSING MY FACULTY TAB

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).



The screenshot displays the Schulich Postgraduate Medical Education interface. The top navigation bar includes 'Dashboard', 'Communities', 'Curriculum', 'Courses', 'Learning Events', 'People Search', 'Learning Objects', 'Admin', and 'Reports'. The 'Faculty' tab is highlighted in the top right corner (1). The main content area is titled 'Assessment & Evaluation' and features a tabbed interface with 'Assessment Tasks', 'Tasks Completed on Me', 'My Completed Tasks', 'My Feedback', 'My Learners', and 'Faculty' (2). A search bar labeled 'Search Faculty' (3) is present. Below the search bar, four faculty members are listed: Alvarez, Cassius; Benson, Eli; Bowie, Granville; and Bowie, Riley. Each entry includes a 'View assessment tasks' link (4).

- 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).

## Cassius Alvarez's Assessments

Current Tasks
Completed Tasks
Up **5** Tasks
Tasks Completed on Faculty

Delivery Date

Delivery Star

Delivery End

Apply Filters

Remove Filters

Cassius Alvarez's Forms Completed

Select All
Download PDF(s)

7

**Critical Care Medicine: Core EPA #3**

Supervisor Form

Optional  
 Delivered on Dec 4, 2020  
 Encountered on Dec 3, 2020  
 Completed on Dec 4, 2020

---

Progress 01

1 target(s) completed for 1 individuals.

---

Target: **Don Park**

Student • 2020

---

Select and click on the **Download PDF(s)** button above to download a PDF of all selected tasks.

View Task ▾

**Critical Care Medicine: Core EPA #3**

Supervisor Form

Optional  
 Delivered on Dec 4, 2020  
 Encountered on Dec 3, 2020  
 Completed on Dec 4, 2020

---

Progress 01

1 target(s) completed for 1 individuals.

---

Target: **Don Park**

Student • 2020

---

Select and click on the **Download PDF(s)** button above to download a PDF of all selected tasks.

View Task ▾

**Critical Care Medicine: Core EPA #2**

Supervisor Form

Optional  
 Delivered on Dec 4, 2020  
 Encountered on Dec 3, 2020  
 Completed on Dec 4, 2020

---

Progress 01

1 target(s) completed for 1 individuals.

---

Target: **Don Park**

Student • 2020

---

Select and click on the **Download PDF(s)** button above to download a PDF of all selected tasks.

View Task ▾

Select All
Download PDF(s)

6

## 7.0 RESIDENTS

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

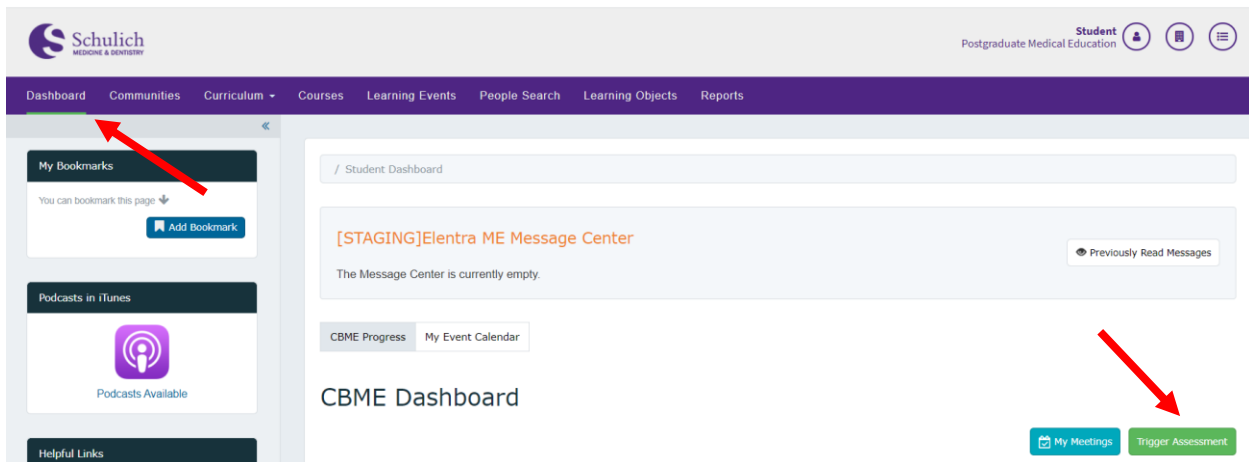
- 7.3.1 Multiple Programs
- 7.3.2 Stages
- 7.3.3 Assessments and Providing Faculty Feedback
- 7.3.4 Assessment Items, Trends and Comments
- 7.3.5 Pins

## 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.



The screenshot shows the Elentra Student Dashboard. The top navigation bar includes 'Dashboard', 'Communities', 'Curriculum', 'Courses', 'Learning Events', 'People Search', 'Learning Objects', and 'Reports'. The main content area displays the 'Student Dashboard' with a message center, 'CBME Progress', and 'My Event Calendar'. At the bottom right, there are buttons for 'My Meetings' and 'Trigger Assessment'. Red arrows point to the 'Dashboard' link in the top navigation bar and the 'Trigger Assessment' button.

- 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).

/ My Assessments / Assessment Tools

If you are the one being assessed, you should select "I am the Target", if you are assessing another resident, you should select "I am the assessor".

I am the target **1**
 I am the assessor

### Assessment Tools

Select Assessor [Click here to select an assessor](#)

Select Program

Select assessment method

Filtering Items by Assessor

- Aaron Burns
- Aaron Dixon **2**
- Aaron Herrera
- Aaron Johnston
- Aaron Lawrence
- Aaron Long
- Aaron Paul
- Aaron Potter
- Aaron Valdez

Select Date of Encounter

External Assessor **3**

Please select an assessor in order to continue.

- 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](mailto:elentra.support@schulich.uwo.ca) to remove the duplicate.

### Assessment Tools

Before you add an external assessor to the system, please make sure that you have searched for your assessor by their first name, last name, and email address using the correct spelling to reduce the possibility of creating a duplicate account.

Select Assessor

External Assessor      **4**

Select Program

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/confirm 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

Select an EPA [Click here to select an EPA](#)

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 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  

Select Program   



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   

Select an EPA   

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

Select Program

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

Select an EPA

Assessment Tools

**Internal Medicine: Transition to Discipline EPA #2** 03:01

**Supervisor Form**

0 assessments completed on this learner.

**9**
 **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.

**Assessment Cue**

Assessment Cue (optional) - please do not include any patient identifiers:

## 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)**

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

Download PDF Forward Task Delete Task

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

<b>Assessor</b>  Fredrick Keller Faculty • Postgraduate Medical Education user+7028@example.org	>	<b>Target</b>  Abe Moore Student • Postgraduate Medical Education user+6476@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

Key Features:

- This EPA includes verifying pertinent clinical findings and completing relevant clinical documentation, including orders

Assessment Plan:

- Indirect observation by supervisor

Basis of Assessment  
 -- Please Select --

Assessor's Role  
 -- Please Select --

- 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.

No  
 Yes

---

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

---

Are there other reasons to flag this assessment?  
No

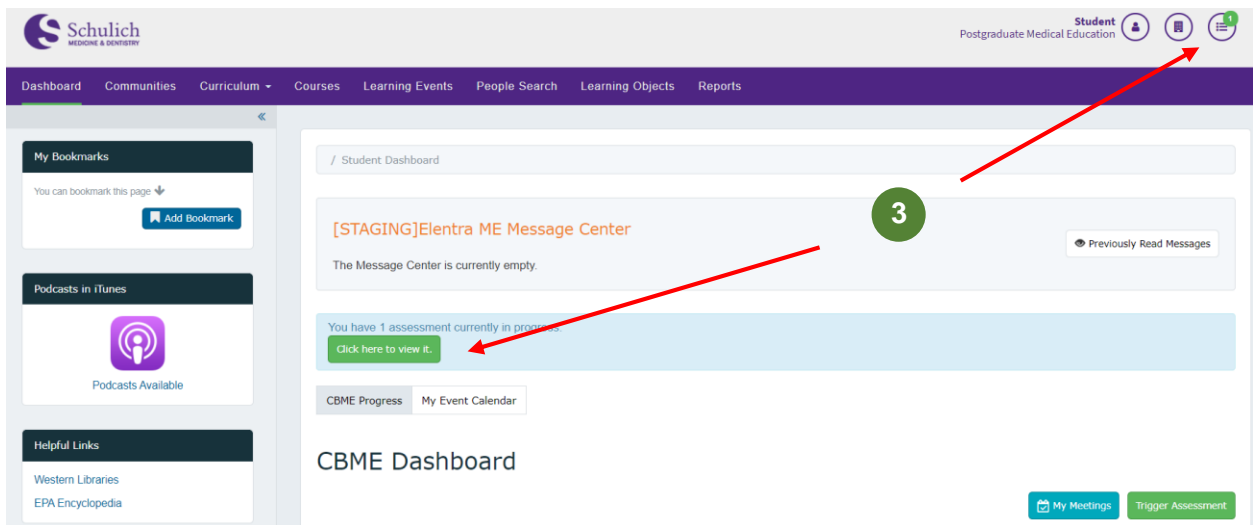
---

Have feedback about this form? (eg, "Missing Dx", etc.)  
No

No  
 Yes

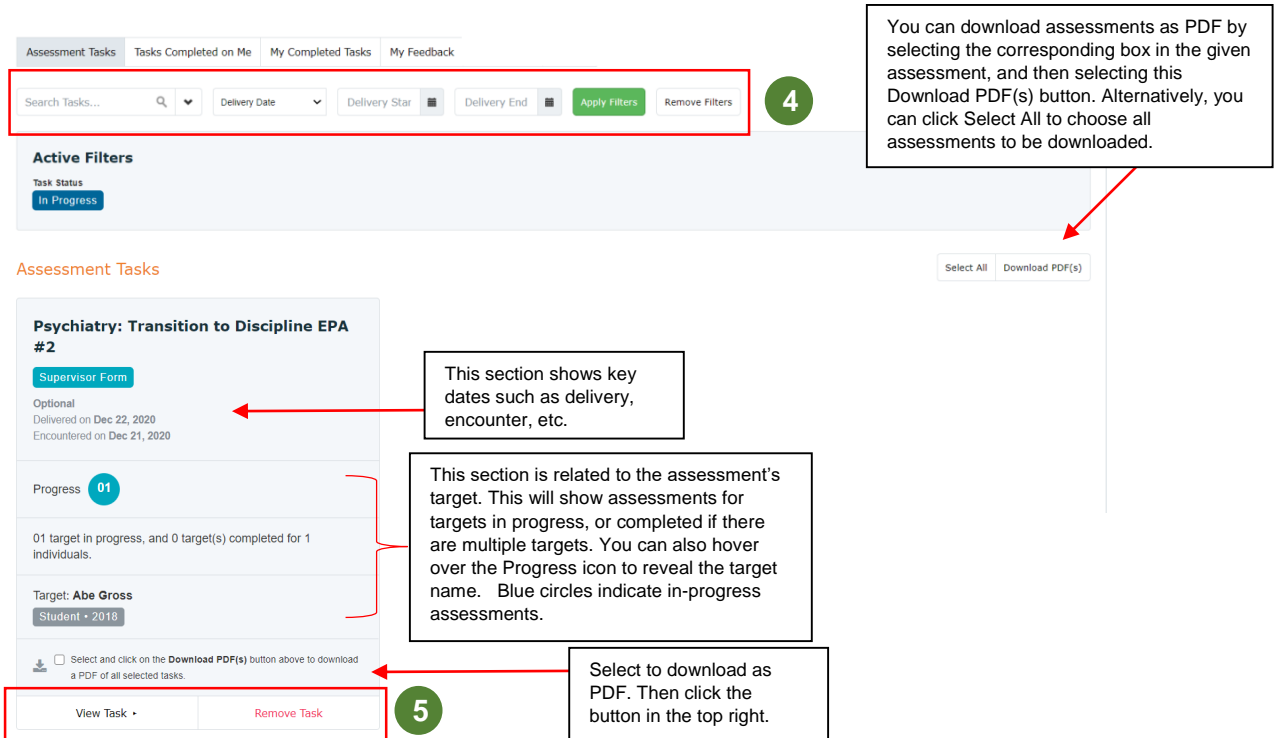
2
or
Submit and notify assessor by email

- 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.



The screenshot shows the Schulich Student Dashboard. In the top right corner, there is a notification icon with a green badge containing the number '3'. A red arrow points from this icon to a notification box in the main content area. The notification box contains the text: "You have 1 assessment currently in progress" and a green button that says "Click here to view it:". Another red arrow points from a green circle with the number '3' to this notification box. The dashboard also features a navigation menu, a sidebar with "My Bookmarks", "Podcasts in iTunes", and "Helpful Links", and a "CBME Dashboard" section at the bottom.

- 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.



The screenshot shows the 'Assessment Tasks' interface. At the top, there are tabs for 'Assessment Tasks', 'Tasks Completed on Me', 'My Completed Tasks', and 'My Feedback'. Below the tabs is a search bar with a search icon and a dropdown arrow. To the right of the search bar are filters for 'Delivery Date', 'Delivery Star', and 'Delivery End', along with 'Apply Filters' and 'Remove Filters' buttons. A red box highlights the search and filter area, with a callout box (4) stating: '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.' Below the search bar is an 'Active Filters' section with a 'Task Status' dropdown set to 'In Progress'. The main content area is titled 'Assessment Tasks' and shows a list of tasks. The first task is 'Psychiatry: Transition to Discipline EPA #2'. It includes a 'Supervisor Form' button, 'Optional' status, and dates: 'Delivered on Dec 22, 2020' and 'Encountered on Dec 21, 2020'. Below this is a 'Progress' section with a blue circle containing '01'. A callout box explains: '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.' The target name is 'Abe Gross' (Student • 2018). At the bottom of the task card, there is a checkbox for 'Download PDF(s)' and a callout box (5) stating: 'Select to download as PDF. Then click the button in the top right.' At the very bottom of the task card are 'View Task' and 'Remove Task' buttons.

### 7.1.3 EPA Expiries and Reminder Emails

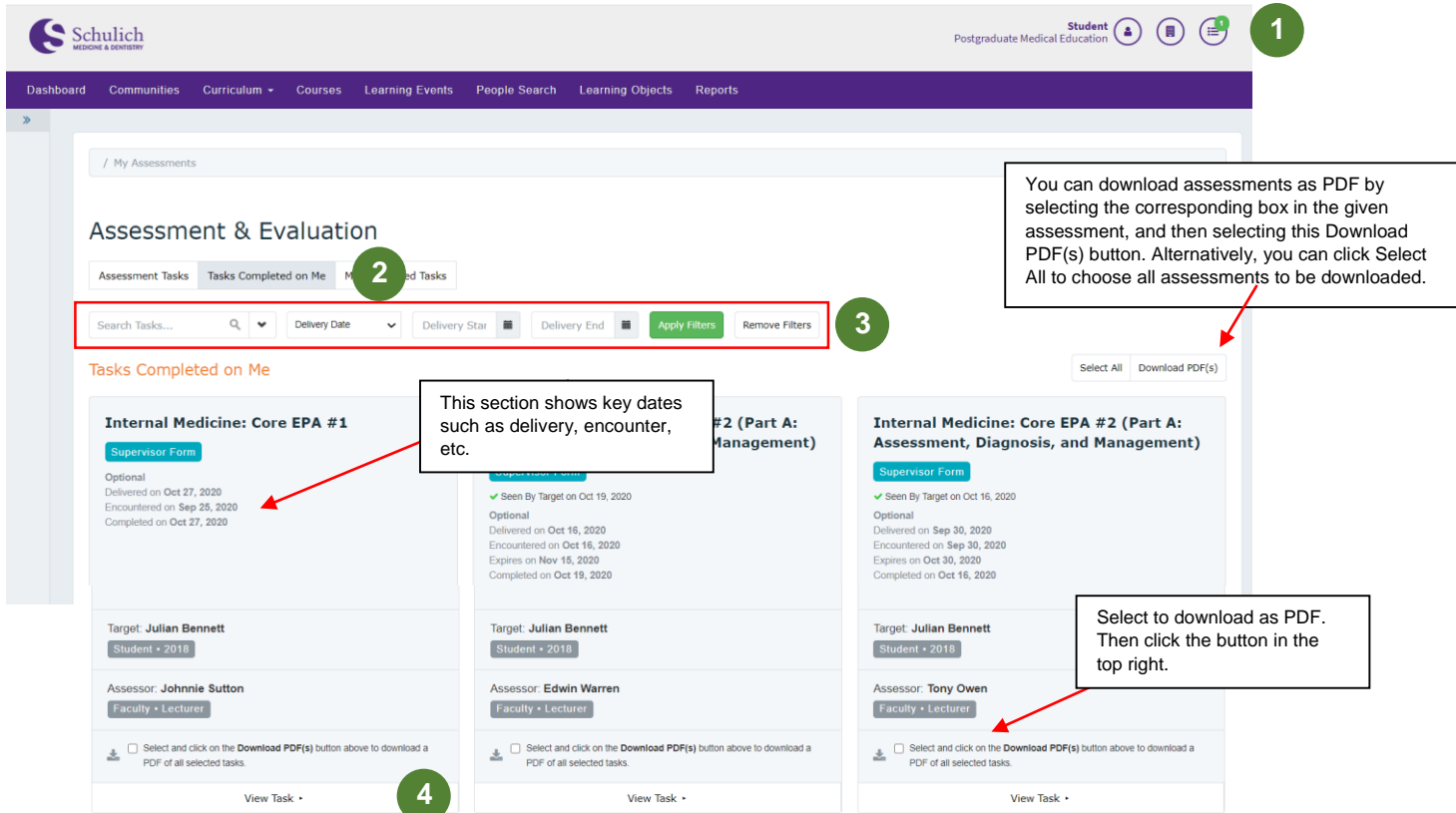
Incomplete EPA assessments will automatically expire 30 days after the initial trigger date. This timeframe will be revisited often to determine an optimal balance between the quality and prioritization of EPA completion with adapting to our new CBME culture.

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

- 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).

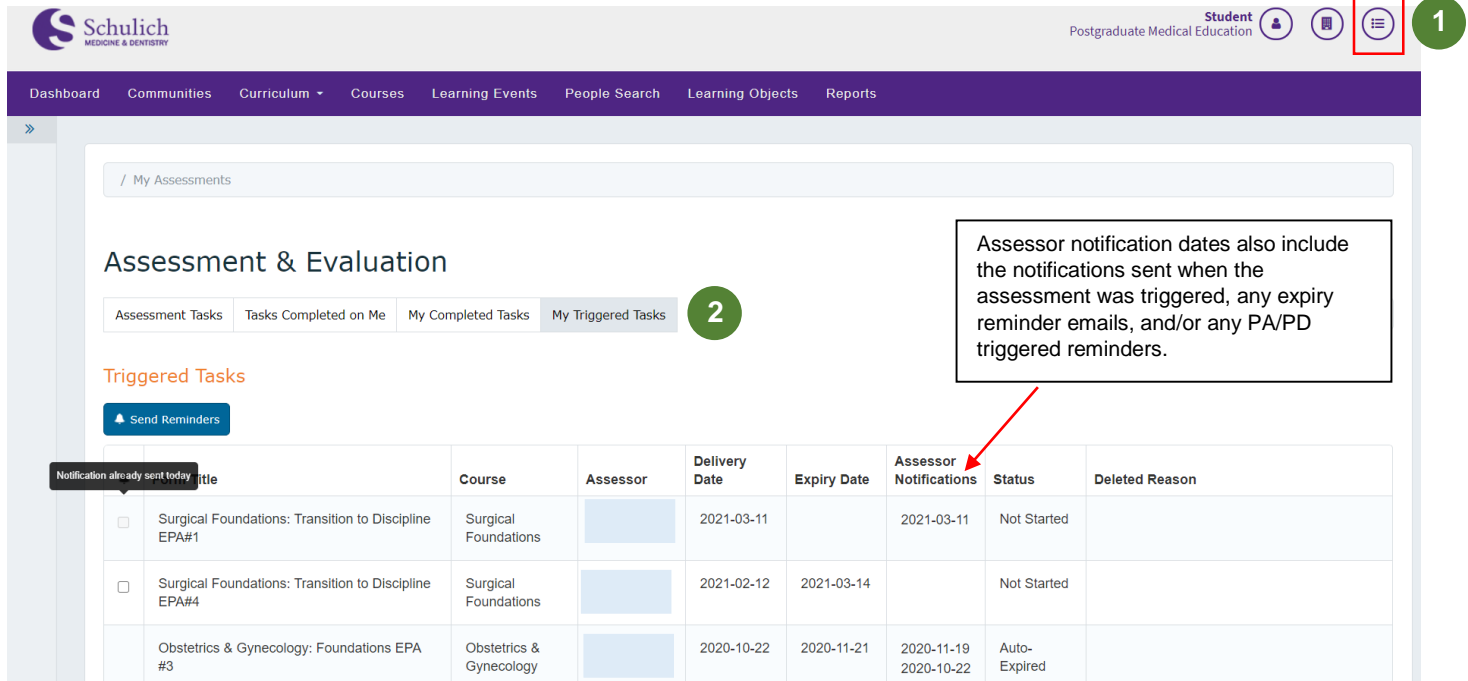


The screenshot shows the 'Assessment & Evaluation' section of the Schulich system. The top navigation bar includes 'Student' and 'Postgraduate Medical Education' with a notification icon (1). The main content area is titled 'Assessment & Evaluation' and has tabs for 'Assessment Tasks', 'Tasks Completed on Me' (2), and 'My Completed Tasks'. A filter bar (3) contains a search field, 'Delivery Date', 'Delivery Star', and 'Delivery End' dropdowns, along with 'Apply Filters' and 'Remove Filters' buttons. Below the filter bar, the section 'Tasks Completed on Me' displays three assessment cards. Each card includes a 'Supervisor Form' button, 'Optional' status, delivery/encounter/expiration/completion dates, target and assessor information, and a 'Download PDF(s)' button. Callout 4 points to the 'View Task' button at the bottom of each card. A separate callout explains that clicking the 'Download PDF(s)' button allows for downloading assessments as PDFs, either individually or by selecting all.

## 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.



Assessment & Evaluation

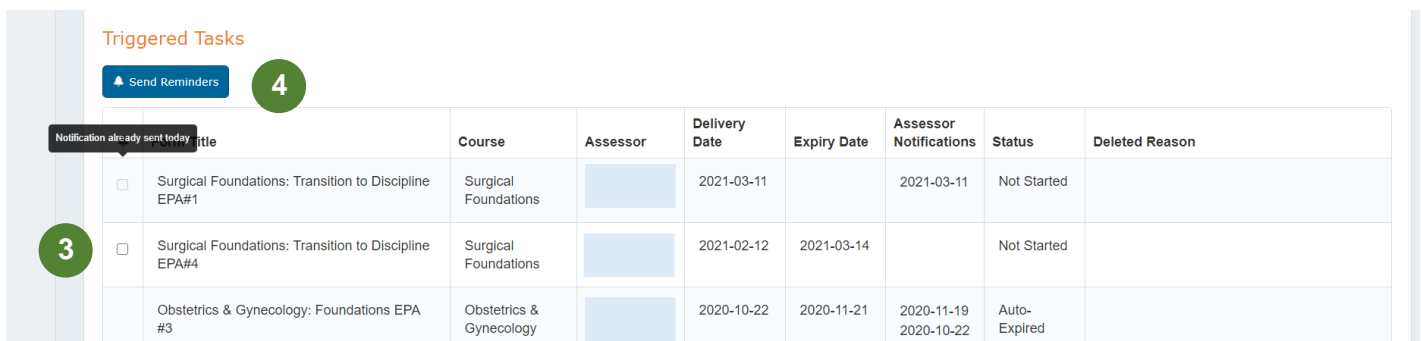
Assessment Tasks | Tasks Completed on Me | My Completed Tasks | My Triggered Tasks (2)

Triggered Tasks

Send Reminders

Notification already sent today	Title	Course	Assessor	Delivery Date	Expiry Date	Assessor Notifications	Status	Deleted Reason
<input type="checkbox"/>	Surgical Foundations: Transition to Discipline EPA#1	Surgical Foundations		2021-03-11		2021-03-11	Not Started	
<input type="checkbox"/>	Surgical Foundations: Transition to Discipline EPA#4	Surgical Foundations		2021-02-12	2021-03-14		Not Started	
	Obstetrics & Gynecology: Foundations EPA #3	Obstetrics & Gynecology		2020-10-22	2020-11-21	2020-11-19 2020-10-22	Auto-Expired	

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.



Triggered Tasks

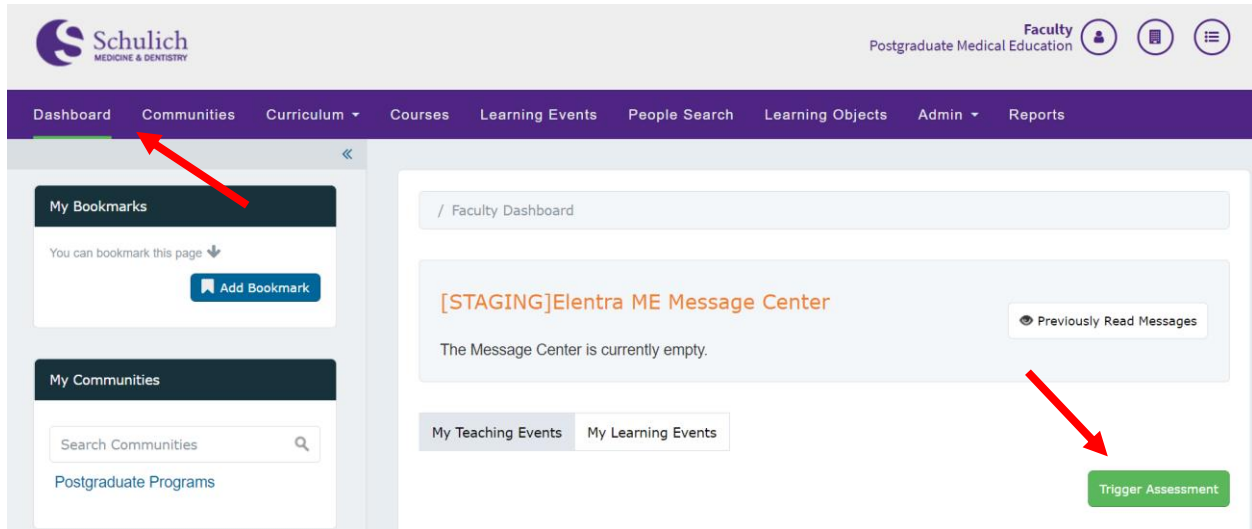
Send Reminders (4)

Notification already sent today	Title	Course	Assessor	Delivery Date	Expiry Date	Assessor Notifications	Status	Deleted Reason
<input type="checkbox"/>	Surgical Foundations: Transition to Discipline EPA#1	Surgical Foundations		2021-03-11		2021-03-11	Not Started	
<input type="checkbox"/>	Surgical Foundations: Transition to Discipline EPA#4	Surgical Foundations		2021-02-12	2021-03-14		Not Started	
	Obstetrics & Gynecology: Foundations EPA #3	Obstetrics & Gynecology		2020-10-22	2020-11-21	2020-11-19 2020-10-22	Auto-Expired	

## 7.2 EPAS AS AN ASSESSOR

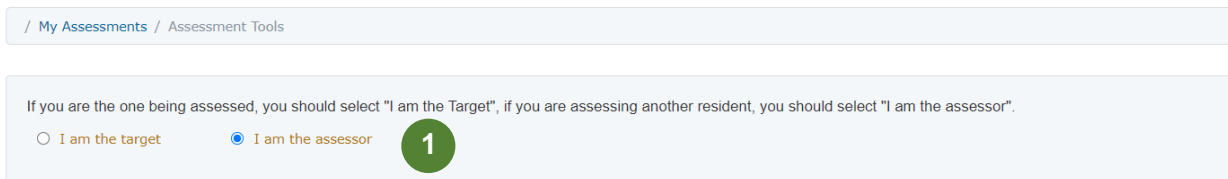
### 7.2.1 Triggering and Completing EPAs

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.



The screenshot shows the Elentra Faculty Dashboard. The top navigation bar includes 'Dashboard', 'Communities', 'Curriculum', 'Courses', 'Learning Events', 'People Search', 'Learning Objects', 'Admin', and 'Reports'. The 'Communities' menu item is highlighted with a red arrow. The main content area shows a message center with a 'Trigger Assessment' button highlighted by another red arrow.

1. Select I am the assessor (1).



The screenshot shows the 'Assessment Tools' section. It includes a breadcrumb trail: / My Assessments / Assessment Tools. Below this, there is a text instruction: "If you are the one being assessed, you should select 'I am the Target', if you are assessing another resident, you should select 'I am the assessor'". Two radio buttons are present: "I am the target" and "I am the assessor". The "I am the assessor" option is selected and circled with a green '1'.

### Assessment Tools

Select Resident

Select Date of Encounter



- 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

Select Resident  (2)

Select Date of Encounter  (3)

Select an EPA  (4)

Assessment Tools

**Internal Medicine: Transition to Discipline EPA#1** (7) ⌚ 02:46

**Supervisor Form**

3 assessments completed on this learner.

(5)      (6)

- 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**

(8)

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

<p>Assessor</p> <div style="display: flex; align-items: center;"> <div style="margin-left: 10px;"> <p>Fredrick Keller</p> <p>Faculty • Postgraduate Medical Education</p> <p>user+7028@example.org</p> </div> </div>	➔	<p>Target</p> <div style="display: flex; align-items: center;"> <div style="margin-left: 10px;"> <p>Abe Moore</p> <p>Student • Postgraduate Medical Education</p> <p>user+6476@example.org</p> </div> </div>
--	---	--

Task delivered on 2020-10-26

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

Assessment Plan:

- Indirect observation by supervisor

Basis of Assessment

-- Please Select --
▼

Assessor's Role

-- Please Select --
▼

- 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.

No  
 Yes

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

Are there other reasons to flag this assessment?  
No

Have feedback about this form? (eg, "Missing Dx", etc.)  
No

No  
 Yes

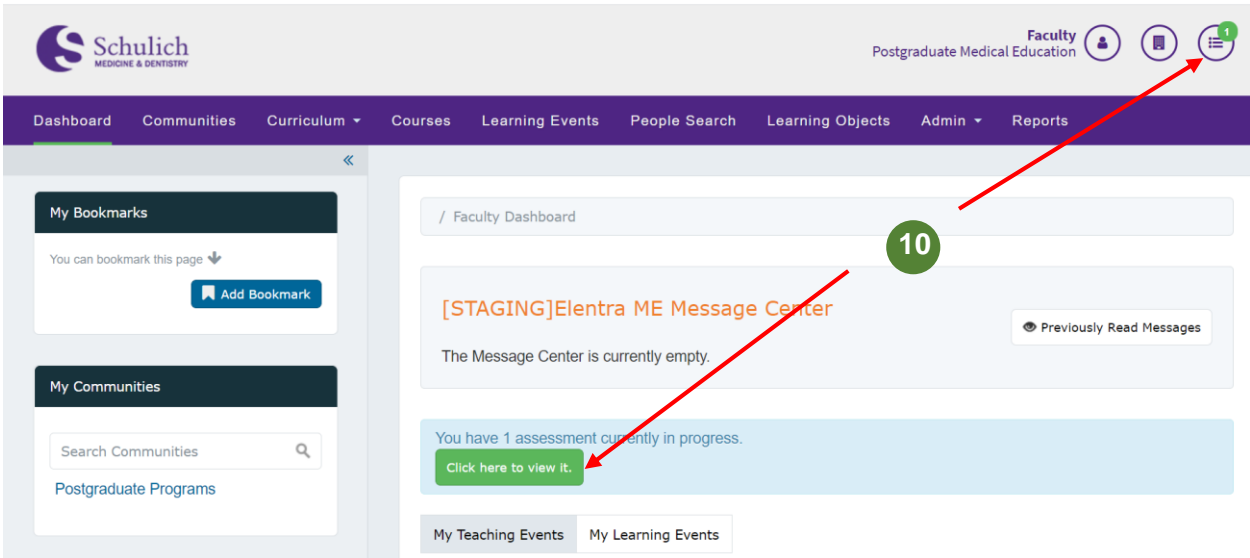
9

Save as Draft

or

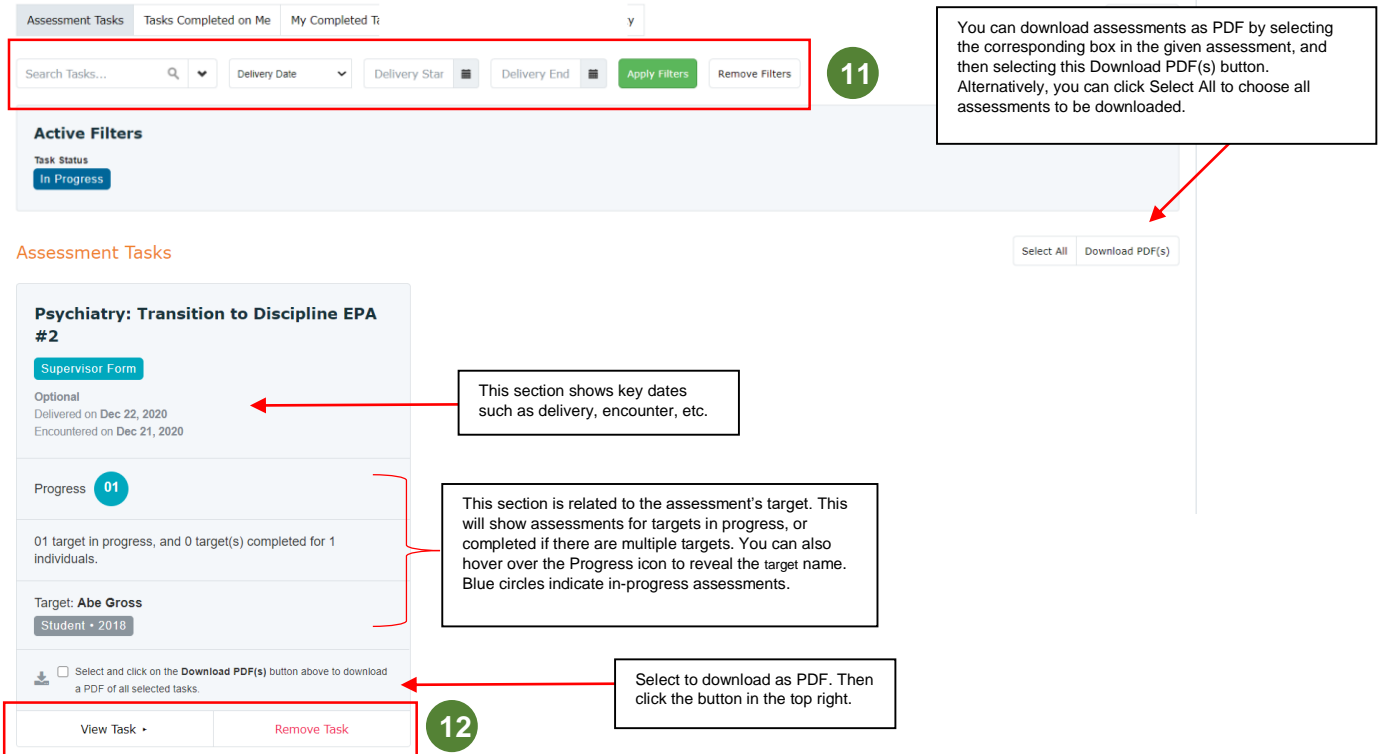
Submit

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.



The screenshot displays the Schulich Faculty Dashboard. The top navigation bar includes the Schulich logo, the text 'Faculty Postgraduate Medical Education', and icons for user profile, mobile, and notifications (with a '1' badge). The main navigation menu contains: Dashboard, Communities, Curriculum, Courses, Learning Events, People Search, Learning Objects, Admin, and Reports. The dashboard content area shows a breadcrumb trail '/ Faculty Dashboard' and a message center titled '[STAGING]Elentra ME Message Center' which is currently empty. A blue notification banner states 'You have 1 assessment currently in progress.' with a green button labeled 'Click here to view it.'. A green circle with the number '10' is placed over the notification banner. A red arrow points from the notification banner to the notification icon in the top right corner.

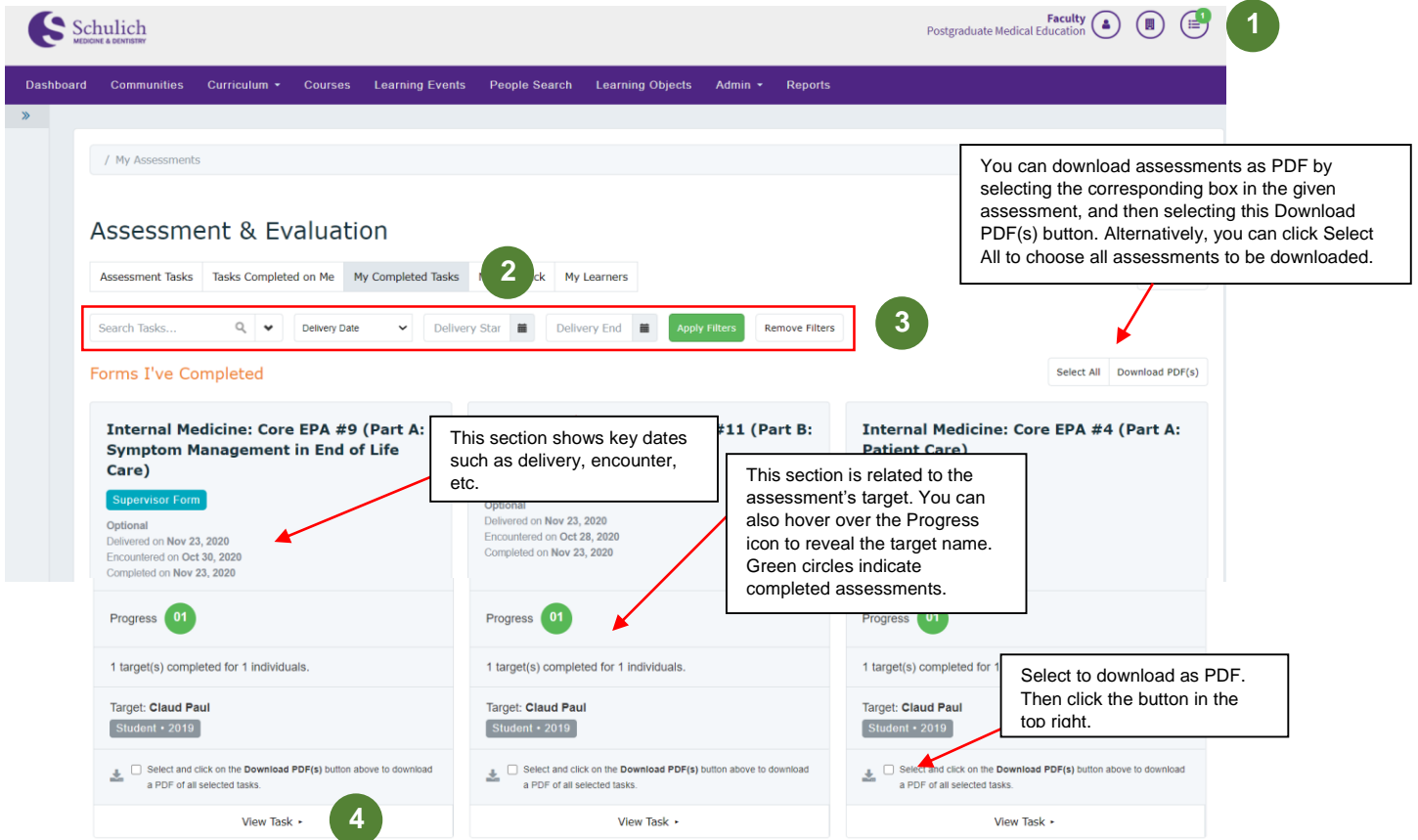
6. Clicking on either of these options will take you to the following screen. Here you will see a list of your outstanding assessments. If you have multiple assessments, you can also use the search functions to narrow down your results (11). On each task you also have the option to View Task or Remove Task (12). Clicking View Task will allow you to continue filling out the form.



The screenshot shows the 'Assessment Tasks' interface. At the top, there are tabs for 'Assessment Tasks', 'Tasks Completed on Me', and 'My Completed T'. Below the tabs is a search bar and filter options for 'Delivery Date', 'Delivery Star', and 'Delivery End'. A green callout '11' points to the search and filter area. A text box explains: '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.' Below the filters is an 'Active Filters' section showing 'Task Status: In Progress'. The main content area is titled 'Assessment Tasks' and shows a task card for 'Psychiatry: Transition to Discipline EPA #2'. The card includes a 'Supervisor Form' section with dates, a 'Progress' section with a blue circle '01' and a target 'Abe Gross', and a 'Download PDF(s)' checkbox. A green callout '12' points to the 'View Task' and 'Remove Task' buttons at the bottom of the card. A text box explains: 'This section shows key dates such as delivery, encounter, etc.' (pointing to the Supervisor Form), '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.' (pointing to the Progress section), and 'Select to download as PDF. Then click the button in the top right.' (pointing to the Download PDF(s) checkbox).

## 7.2.2 Viewing My Completed Tasks

- 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).



The screenshot shows the 'Assessment & Evaluation' section of the Schulich system. The interface includes a navigation menu at the top, a search bar, and a list of completed tasks. Callouts 1 through 4 highlight key features: 1 points to the Assessment & Evaluation icon in the top right; 2 points to the 'My Completed Tasks' tab; 3 points to the filter options (Search Tasks, Delivery Date, Delivery Star, Delivery End, Apply Filters, Remove Filters); and 4 points to the 'View Task' button at the bottom of a task card.

**1** 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.

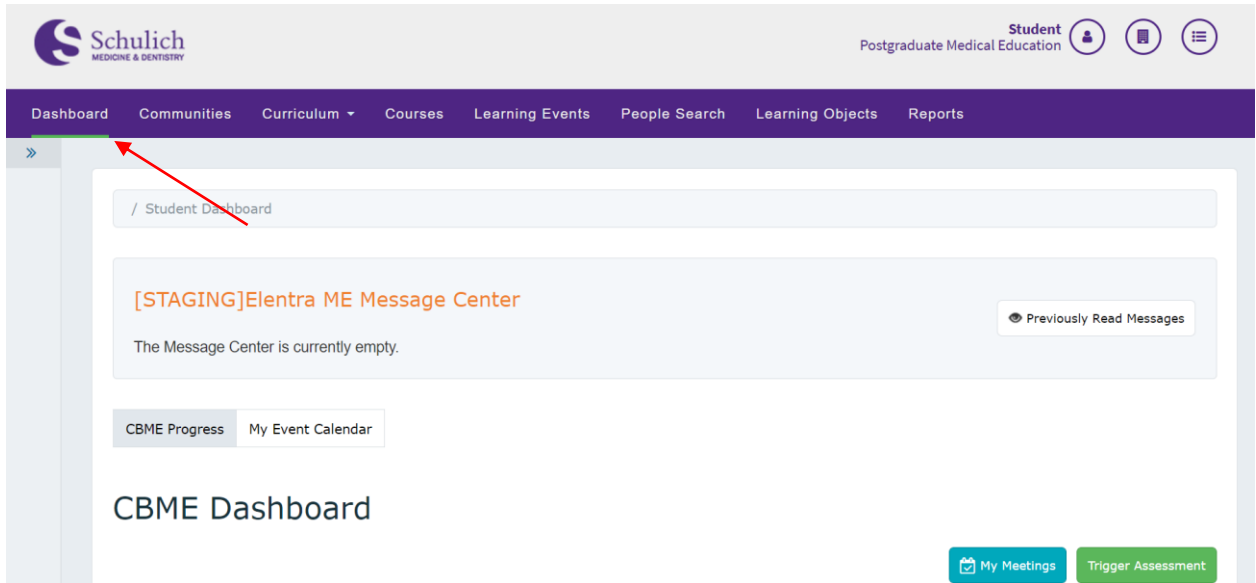
**2** This section shows key dates such as delivery, encounter, etc.

**3** 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.

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

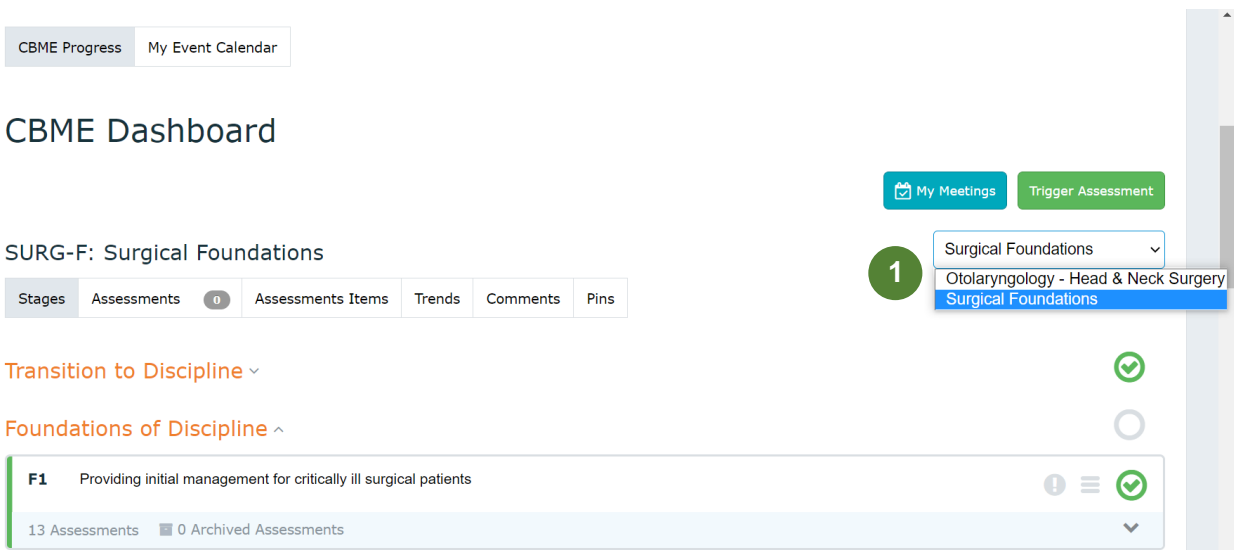
## 7.3 MANAGING CBME DASHBOARD

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

- 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.

SURG-F: Surgical Foundations Surgical Foundations ▾

Stages (1) Items (0) Assessments Items Trends Comments Pins

Transition to Discipline ▾ ✔ (2)

Foundations of Discipline ^ ○

**F1** Providing initial management for critically ill surgical patients ! ☰ ✔

Current Assessments

6	Surgical Foundations: Foundations EPA#1	(4)	0	0	5	1	
7	Surgical Foundations: Foundations EPA#1 (Part B: Pr...		0	0	1	4	2

Archived Assessments

13 Assessments 0 Archived Assessments

**F2** Providing initial management for trauma patients ! ☰ ✔

3 Assessments 0 Archived Assessments

Number of EPAs

4

Score achieved per EPA completed.

3

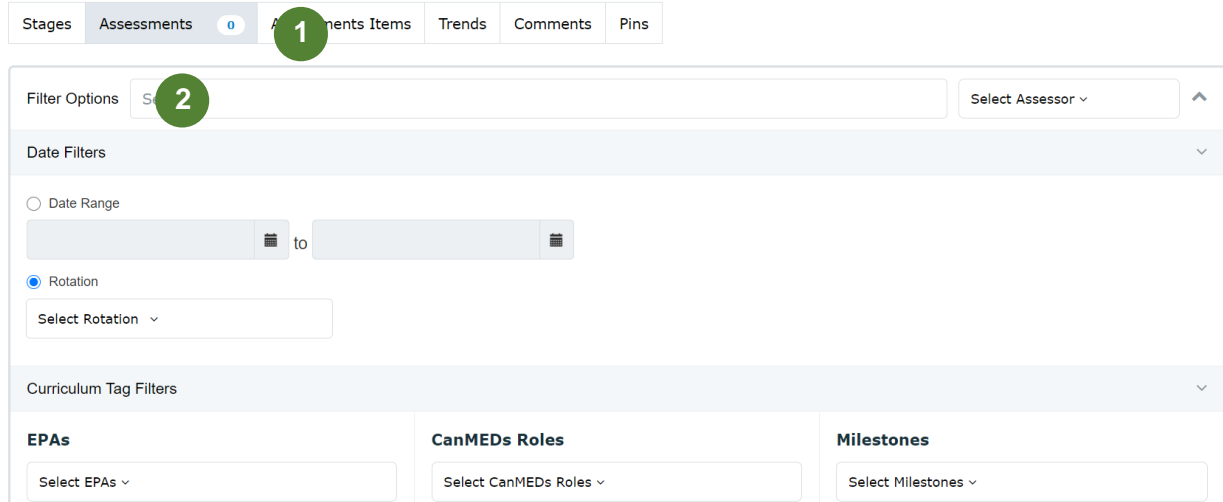
### 7.3.3 Assessments and Providing Faculty Feedback

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

Surgical Foundations



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 In Progress Pending Deleted

3

Completed Assessments

Mark All as Read

**Surgical Foundations: Foundations EPA#9** Nov 21, 2020  
 Supervisor Form F9 ★★★★★  
 View Details Assessed By Douglas Bailey 4

**Surgical Foundations: Foundations EPA#8** Nov 2, 2020  
 Supervisor Form F8 ★★★★★  
 View Details Assessed By Earl Rose 5

**Surgical Foundations: Foundations EPA#8** Nov 2, 2020  
 Supervisor Form F8 ★★★★★  
 View Details Assessed By Earl Rose

7.3.4 Assessment Items, Trends, and Comments

- 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.

CBME Dashboard

SURG-F: Surgical Foundations Surgical Foundations

Stages Assessments Assessments Items Trends Comments Pin 1

Filter Options Search Select Assessor

Date Filters

Date Range [ ] to [ ]

Rotation Select Rotation

Curriculum Tag Filters

EPAs Select EPAs CanMEDs Roles Select CanMEDs Roles Milestones Select Milestones

### 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.

## CBME Dashboard

SURG-F: Surgical Foundations

Surgical Foundations ▾

Stages Assessments **0** Assessments Items Trends Comments Pins **1**

Filter Options  Select Assessor ▾

Date Filters

Date Range

to

Rotation

Select Rotation ▾

Curriculum Tag Filters ▾

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

Assessments Items Comments **2**

### Completed Assessments

**Surgical Foundations: Foundations EPA#8** Oct 24, 2020

Supervisor Form F8 ★★★★★

[View Details](#) Assessed By Jess Richards 👍 👁 📌 ▾

Showing 1 of 1 Filtered Assessments

## 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.

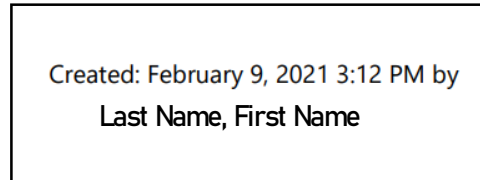
The topics covered in this section include:

- 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?

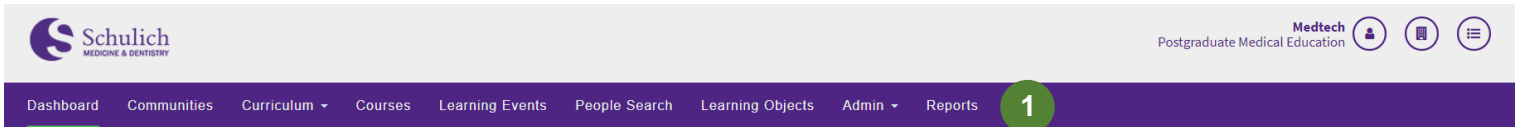
The reports portal has a variety of different reports available, including Assessor Statistics Reports, Raw EPA Data, Resident EPA Summary, Resident EPA Details, and Resident Milestone Summary. The table below shows a breakdown of which roles have access to which reports, and what information is available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

Report	Available User Groups	How to Obtain Access	Data Available
Assessor Statistics Report	Faculty & Residents	Automatic	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.
	PAs & PDs* *If CBME Leads wish to obtain access to this please contact <a href="#">Elentra Support</a> .	PAs & PDs should have access during course set up, but if not please contact <a href="#">Elentra Support</a> .	PAs and PDs can see assessor statistic data for faculty within their program.
Raw EPA Data	Residents	Automatic	Residents are able to see Raw EPA Data for the EPAs they have completed.
	Academic Advisors	Ensure you are set up as an AA, or contact <a href="#">Elentra Support</a> for help.	AAs can see Raw EPA Data for their Learners only.

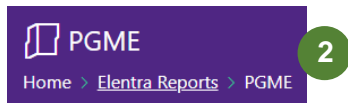
	PAs & PDs	PAs & PDs should have access during course set up, but if not please contact <a href="#">Elentra Support</a> .	PAs and PDs can see Raw EPA Data for the EPAs that their program's residents have completed.
Resident EPA Summary & Resident EPA Details & Resident Milestone Summary	Residents	Automatic	Residents are able to see their own data.
	Academic Advisors	Ensure you are set up as an AA, or contact <a href="#">Elentra Support</a> for help	AAs can see data for their Learners only.
	PAs, PDs & CC Members	PAs, PDs and 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

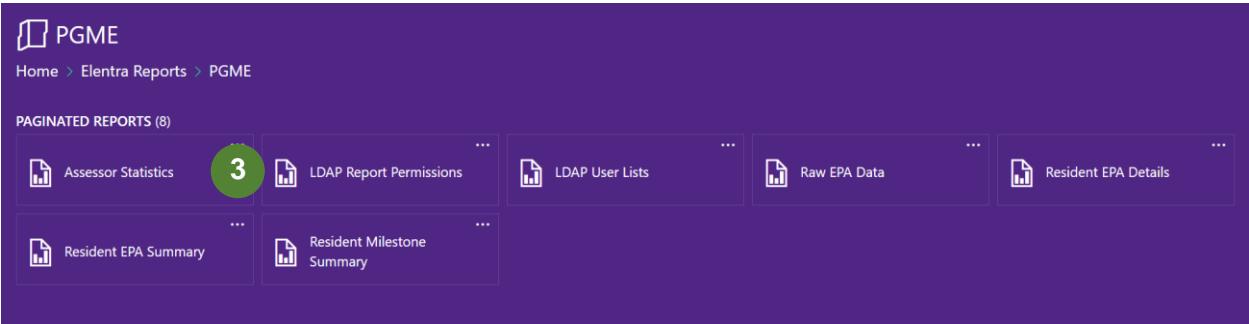
1. To access the Assessor Statistics Report, click on the Reports **(1)** tab.



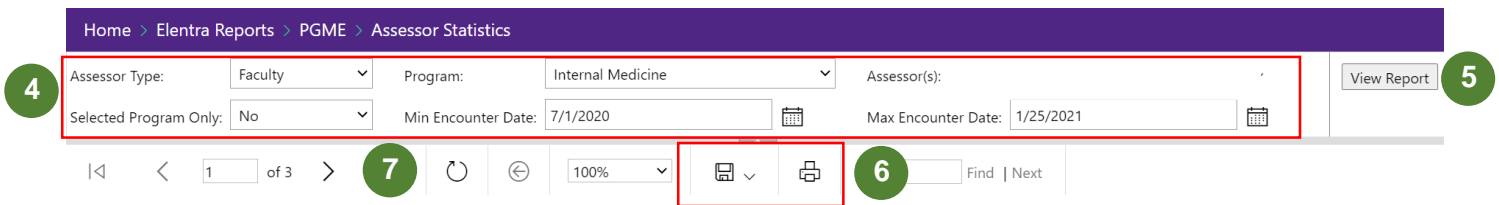
2. A new browser page will then open where you will be asked to enter your UWO credentials. Once logged in, click on Elentra Reports, then PGME **(2)**.



- 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.



- 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

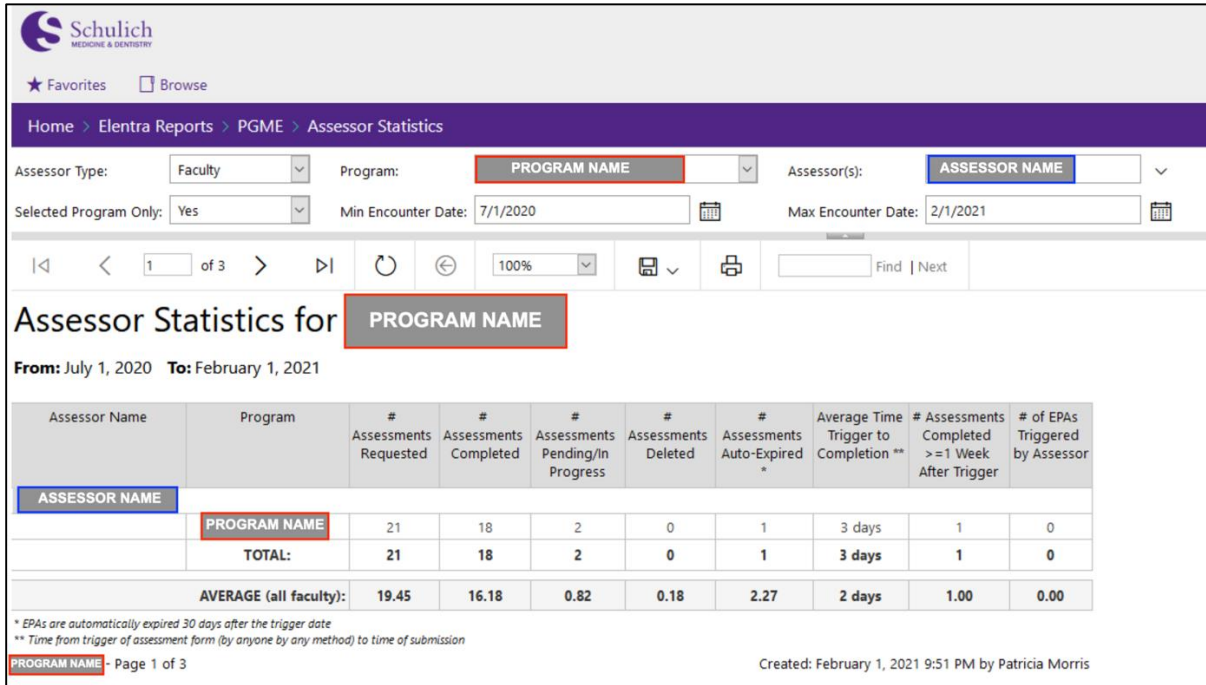
This section of the manual describes the different reports available and the type of information you can find in each report. For instructions on how to navigate to the report portals and how to filter your results, refer to section [8.2](#).

### 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.




The screenshot shows the Schulich Assessor Statistics report interface. At the top, there are navigation links for Home, Elentra Reports, PGME, and Assessor Statistics. Below this, there are filter options for Assessor Type (Faculty), Program (PROGRAM NAME), Assessor(s) (ASSESSOR NAME), Selected Program Only (Yes), Min Encounter Date (7/1/2020), and Max Encounter Date (2/1/2021). A toolbar includes navigation arrows, a refresh button, a search box, and a 'Find | Next' button. The main heading is 'Assessor Statistics for PROGRAM NAME' with a date range 'From: July 1, 2020 To: February 1, 2021'. A table displays the following data:

Assessor Name	Program	# Assessments Requested	# Assessments Completed	# Assessments Pending/In Progress	# Assessments Deleted	# Assessments Auto-Expired *	Average Time Trigger to Completion **	# Assessments Completed >= 1 Week After Trigger	# of EPAs Triggered by Assessor
ASSESSOR NAME	PROGRAM NAME	21	18	2	0	1	3 days	1	0
<b>TOTAL:</b>		<b>21</b>	<b>18</b>	<b>2</b>	<b>0</b>	<b>1</b>	<b>3 days</b>	<b>1</b>	<b>0</b>
<b>AVERAGE (all faculty):</b>		<b>19.45</b>	<b>16.18</b>	<b>0.82</b>	<b>0.18</b>	<b>2.27</b>	<b>2 days</b>	<b>1.00</b>	<b>0.00</b>

Footnote: \* EPAs are automatically expired 30 days after the trigger date  
 \*\* Time from trigger of assessment form (by anyone by any method) to time of submission

Page 1 of 3 | Created: February 1, 2021 9:51 PM by Patricia Morris

- 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.


★ Favorites  Browse

Home > Elenra Reports > PGME > Assessor Statistics

Assessor Type:  Program:  Assessor(s):

Selected Program Only:  Min Encounter Date:  Max Encounter Date:

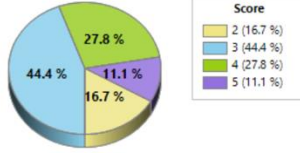
100% Find | Next

**From:** July 1, 2020 **To:** February 1, 2021

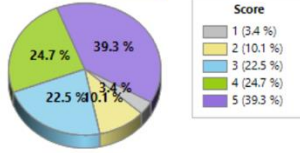
**Distribution of Completed Entrustment Scale Scores**

Faculty Name	Program	# Assessments Completed	5	4	3	2	1
<input type="text" value="ASSESSOR NAME"/>	<input type="text" value="PROGRAM NAME"/>	18	11.1%	27.8%	44.4%	16.7%	0.0%
<b>TOTAL:</b>		<b>18</b>	<b>11.1%</b>	<b>27.8%</b>	<b>44.4%</b>	<b>16.7%</b>	<b>0.0%</b>

**Distribution of Entrustment Scale Scores**  
EPAs from  completed by



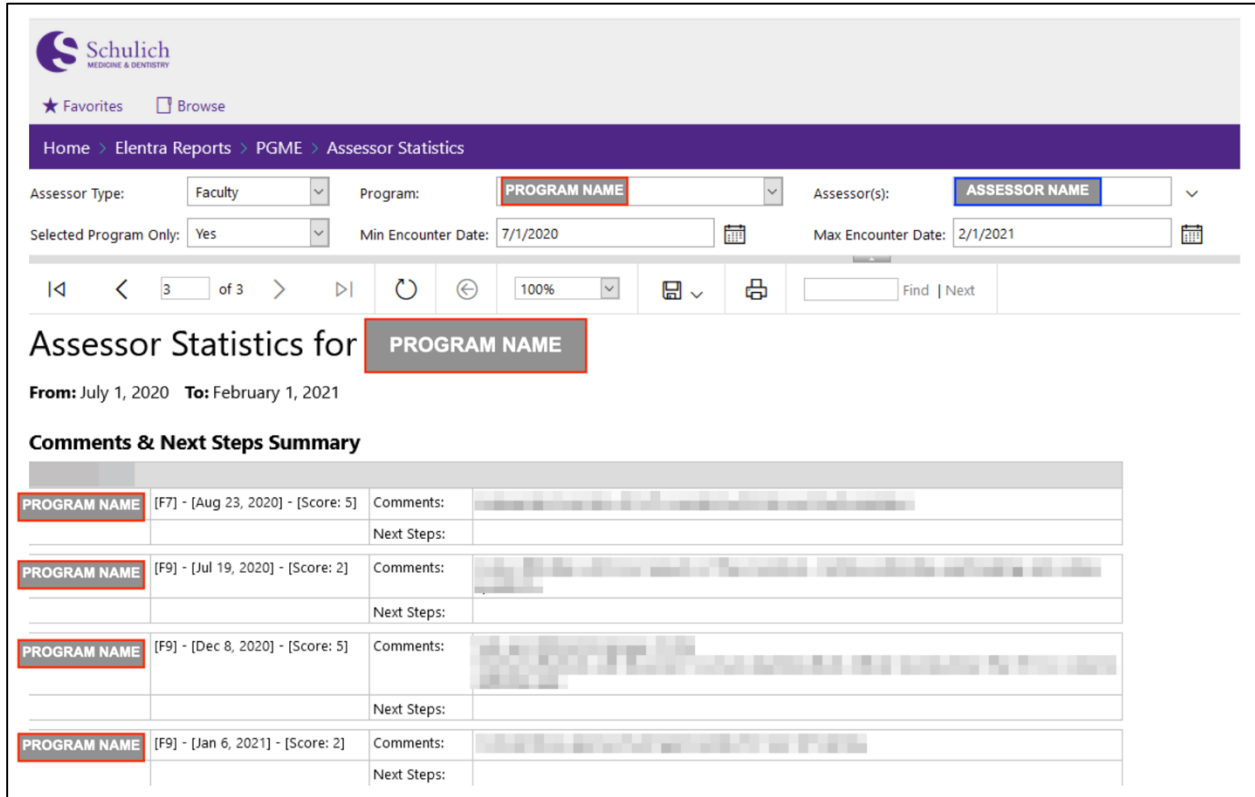
**Distribution of Entrustment Scale Scores**  
EPAs from  completed by all  faculty



- Page 2 of 3
Created: February 1, 2021 9:51 PM by Patricia Morris



- The third page shows the narrative comments and next steps entered into Elentra by the faculty member.



Assessor Type: Faculty Program: PROGRAM NAME Assessor(s): ASSESSOR NAME

Selected Program Only: Yes Min Encounter Date: 7/1/2020 Max Encounter Date: 2/1/2021

Assessor Statistics for PROGRAM NAME

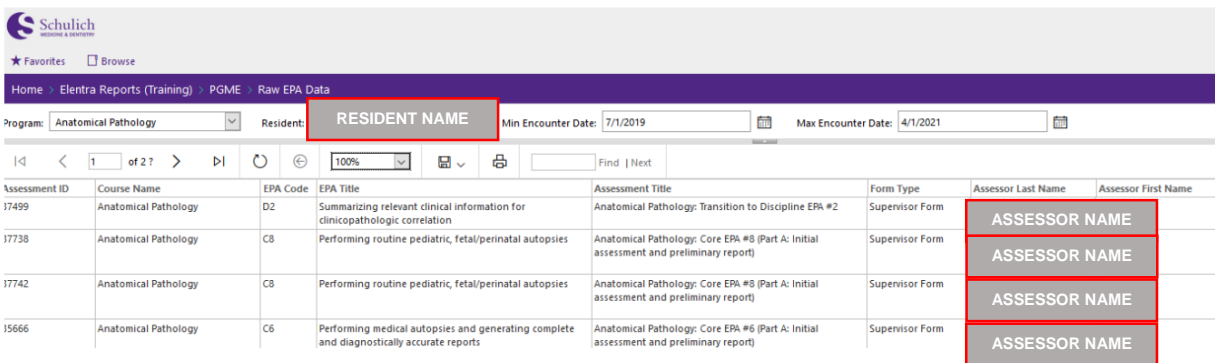
From: July 1, 2020 To: February 1, 2021

**Comments & Next Steps Summary**

PROGRAM NAME	Encounter	Score	Comments	Next Steps
PROGRAM NAME	[F7] - [Aug 23, 2020]	[Score: 5]	[Redacted]	[Redacted]
PROGRAM NAME	[F9] - [Jul 19, 2020]	[Score: 2]	[Redacted]	[Redacted]
PROGRAM NAME	[F9] - [Dec 8, 2020]	[Score: 5]	[Redacted]	[Redacted]
PROGRAM NAME	[F9] - [Jan 6, 2021]	[Score: 2]	[Redacted]	[Redacted]

### 8.4.2 Raw EPA Data

The Raw EPA Data report shows all data associated with an EPA. The type of information shown in 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 snippet of what the Raw EPA Data report looks like due to the large amount of information.

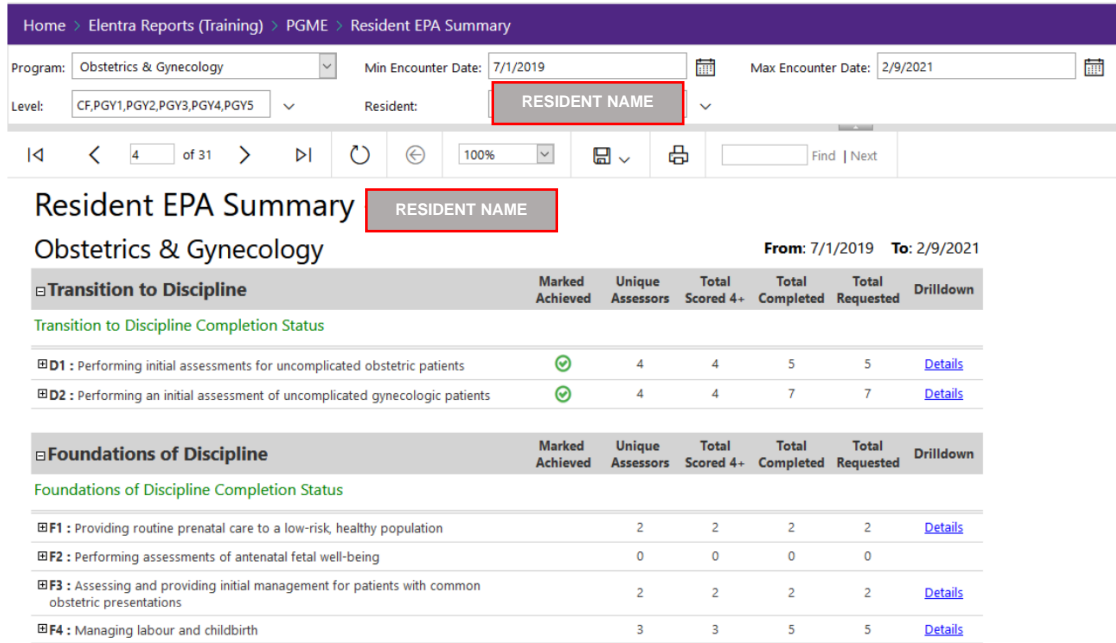


Program: Anatomical Pathology Resident: RESIDENT NAME Min Encounter Date: 7/1/2019 Max Encounter Date: 4/1/2021

Assessment ID	Course Name	EPA Code	EPA Title	Assessment Title	Form Type	Assessor Last Name	Assessor First Name
17499	Anatomical Pathology	D2	Summarizing relevant clinical information for clinicopathologic correlation	Anatomical Pathology: Transition to Discipline EPA #2	Supervisor Form	ASSESSOR NAME	
17738	Anatomical Pathology	C8	Performing routine pediatric, fetal/perinatal autopsies	Anatomical Pathology: Core EPA #8 (Part A: Initial assessment and preliminary report)	Supervisor Form	ASSESSOR NAME	
17742	Anatomical Pathology	C8	Performing routine pediatric, fetal/perinatal autopsies	Anatomical Pathology: Core EPA #8 (Part A: Initial assessment and preliminary report)	Supervisor Form	ASSESSOR NAME	
15666	Anatomical Pathology	C6	Performing medical autopsies and generating complete and diagnostically accurate reports	Anatomical Pathology: Core EPA #6 (Part A: Initial assessment and preliminary report)	Supervisor Form	ASSESSOR NAME	

### 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.



**Resident EPA Summary** RESIDENT NAME

**Obstetrics & Gynecology** From: 7/1/2019 To: 2/9/2021

	Marked Achieved	Unique Assessors	Total Scored 4+	Total Completed	Total Requested	Drilldown
<b>Transition to Discipline</b>						
Transition to Discipline Completion Status						
D1 : Performing initial assessments for uncomplicated obstetric patients	4	4	4	5	5	<a href="#">Details</a>
D2 : Performing an initial assessment of uncomplicated gynecologic patients	4	4	4	7	7	<a href="#">Details</a>
<b>Foundations of Discipline</b>						
Foundations of Discipline Completion Status						
F1 : Providing routine prenatal care to a low-risk, healthy population		2	2	2	2	<a href="#">Details</a>
F2 : Performing assessments of antenatal fetal well-being		0	0	0	0	
F3 : Assessing and providing initial management for patients with common obstetric presentations		2	2	2	2	<a href="#">Details</a>
F4 : Managing labour and childbirth		3	3	5	5	<a href="#">Details</a>

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:

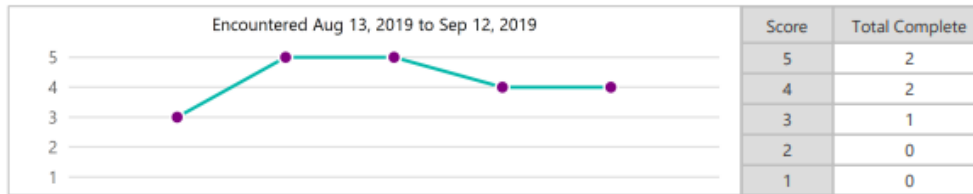
Collect 3 observations of achievement

- At least 1 antepartum patient
- At least 1 intrapartum patient
- At least 2 observations by faculty
- At least 3 different observers

**Assessments**

	Faculty Assessors	Resident Assessors	All Assessors
Unique Assessors (Scores 4+)	3	1	4
Complete (Scores 4+)	3	1	4
Complete (Any Score)	4	1	5
Requested Assessments	4	1	5

**Entrustment Scores**



### 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.

Home > Elentra Reports (Training) > PGME > Resident Milestone Summary

Program: Gastroenterology
 Min Encounter Date: 7/1/2019
 Max Encounter Date: 4/1/2021

Level: CF,PGY4,PGY5
 Resident: RESIDENT NAME

⏪ ⏩ 1 of 6 ⏪ ⏩ ↺ ↻ 100% 📄 🖨 🔍 Find | Next

## EPA Assessment Milestone Summary

### Gastroenterology

RESIDENT NAME

From: 7/1/2019 To: 4/1/2021

✔

**Gastroenterology: Transition to Discipline EPA #1**

Assessing, triaging, and initiating management for patients with GI emergencies

Milestone	Not observed	In Progress	Achieved
D CL3.1.1 Identify patients requiring handover to other physicians or health care professionals	0	0	6
D ME2.1.1 Determine the acuity of the issue and establish priorities for patient care	0	0	6
D ME2.2.1 Perform a history and physical exam relevant to the patient's presentation, in a time-effective manner	0	0	6
D ME2.2.2 Develop a differential and provisional diagnosis relevant to the patient's presentation	0	1	5
D ME2.4.1 Develop and implement initial management plans for gastrointestinal emergencies	0	1	5
D ME4.1.1 Determine the need and timing of referral to another health care professional	0	0	6
D PR1.1.1 Work within personal limitations, asking for assistance as needed	0	0	6