Verbally Communicate
Residents ask for an EPA assessment
- In person
- Confirm a prior email request for an EPA

Observation of the EPA
Residents can be observed
- Directly
- Indirectly: e.g. case presentation, chart review

Direct Observation   Indirect Observation

Verbally Communicate
Assessor gives feedback in a coaching manner

Communicate
Confirm how the EPA will be completed in Elentra based on options A, B, C, D below.

1. Trainee-triggered assessment?
Trainee logs into Elentra: desktop, laptop, mobile
  A.   Email blank form
  B.   Complete and confirm via email *
  C.   Complete and confirm via PIN *
  D.   Self Assessment, then blank email form
*clarify how much of the form the trainee will complete

Or

2. Assessor-triggered assessment?
Assessor logs into Elentra: desktop, laptop, mobile
  1.   Triggers assessment and completes form

Trainee-triggered assessment

A. Email blank form

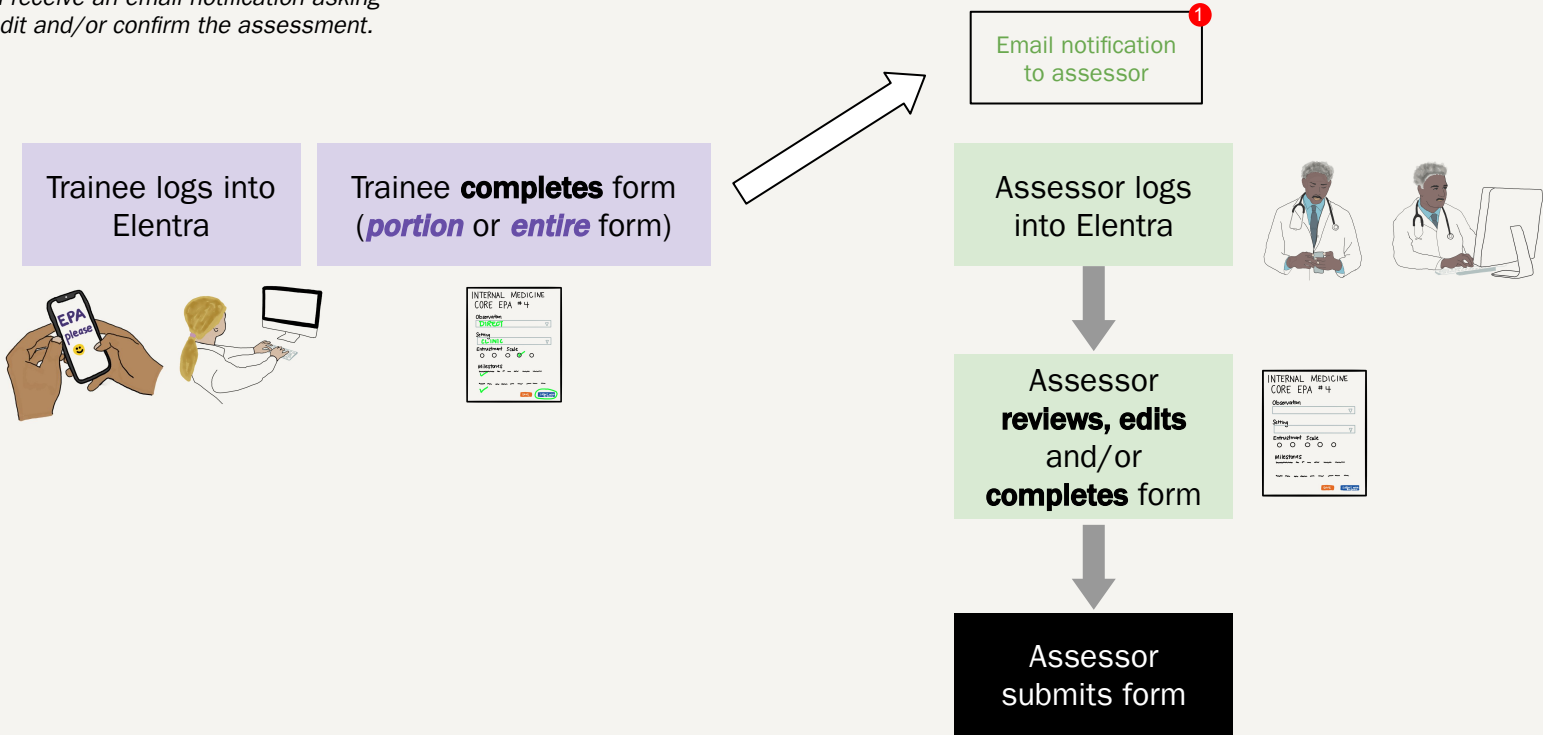*Trainee sends a blank form
The assessor will receive an
email notification to complete
an assessment*

Trainee logs into
Elentra

Email notification
to assessor

Assessor logs
into Elentra

Assessor
completes
entire form

Assessor
submits form
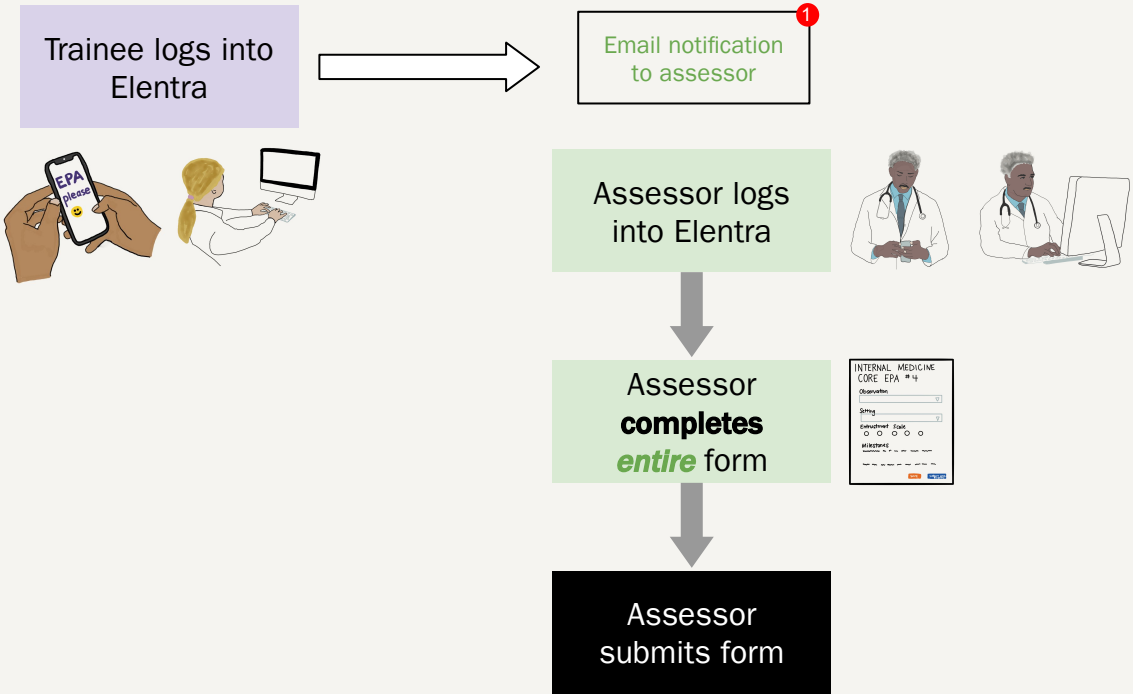
Trainee-triggered assessment

B. Complete and confirm via email

Trainee completes portions or all of the form and assessor confirms and submits form after logging into Elentra.

The assessor will receive an email notification asking them to review, edit and/or confirm the assessment.

Trainee logs into Elentra

Trainee **completes** form (*portion* or *entire* form)

Email notification to assessor

Assessor logs into Elentra

Assessor **reviews, edits** and/or **completes** form

Assessor submits form

Trainee-triggered assessment

c. Complete and confirm via PIN

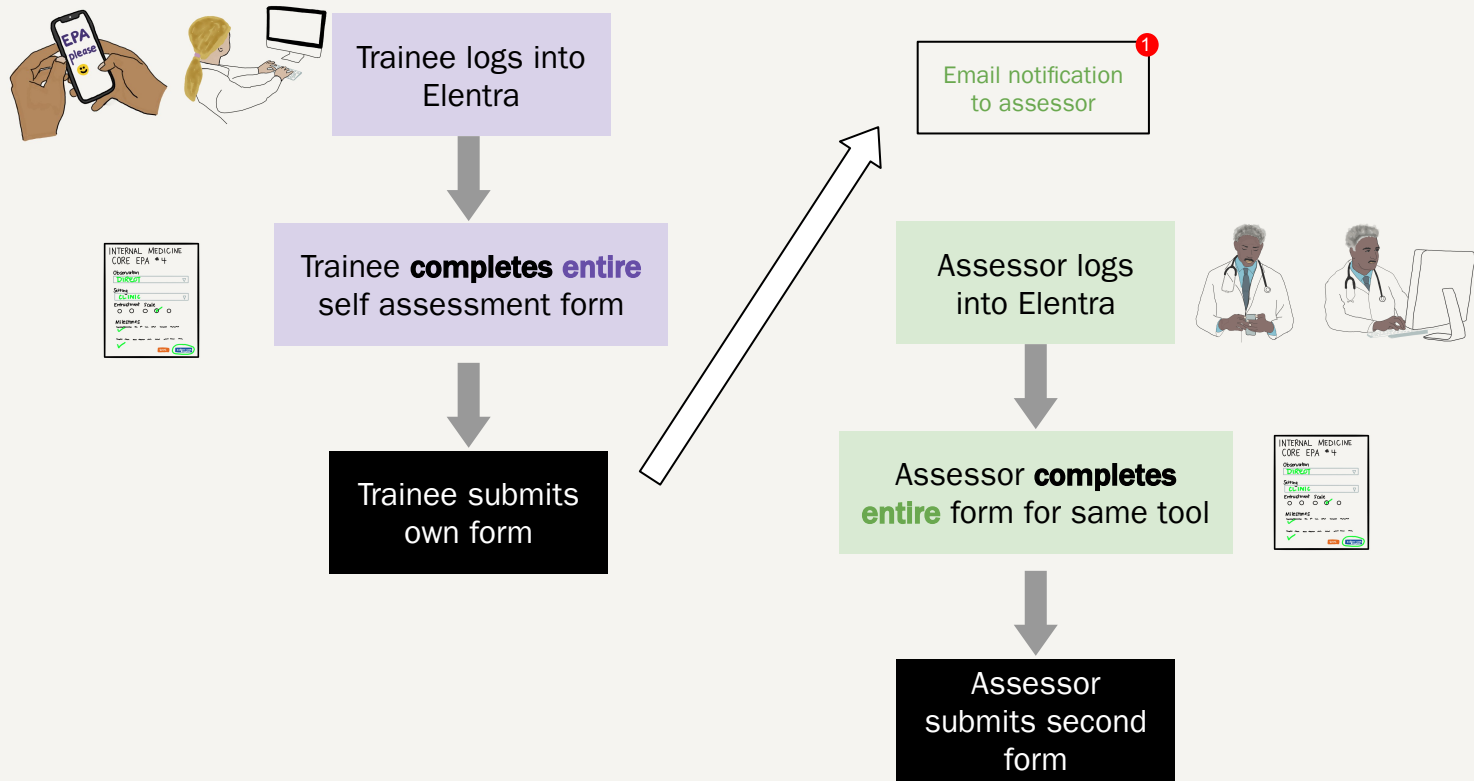*Trainee completes portions or all of the form and assessor confirms and submits form using personal identification number (PIN) on the spot.*

Trainee logs into Elentra

Trainee **completes** form (*portion* or *entire* form)

Trainee shows form on mobile device to assessor

Assessor **reviews, edits** and/or **completes** form

Assessor submits form by entering PIN

Assessor does not log into Elentra!
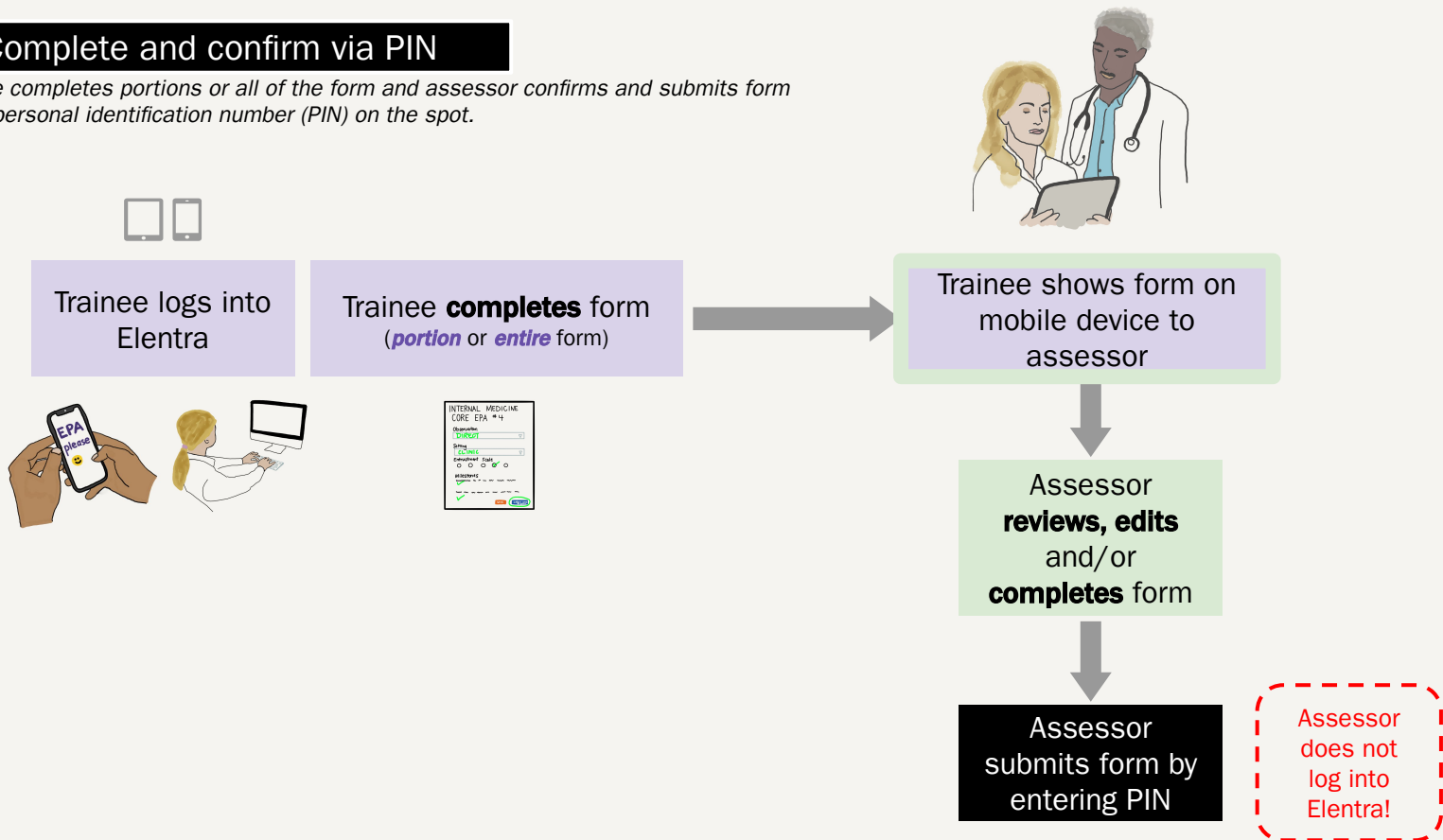
Trainee-triggered assessment

D. Self Assessment, then blank email form

Trainee completes a self assessment based on the selected tool. Upon completion, the assessor will receive a blank assessment task for the same tool
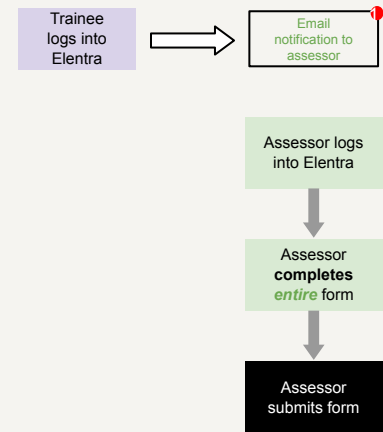
Trainee logs into Elentra

Trainee **completes entire** self assessment form

Trainee submits own form

Email notification to assessor

Assessor logs into Elentra

Assessor **completes entire** form for same tool
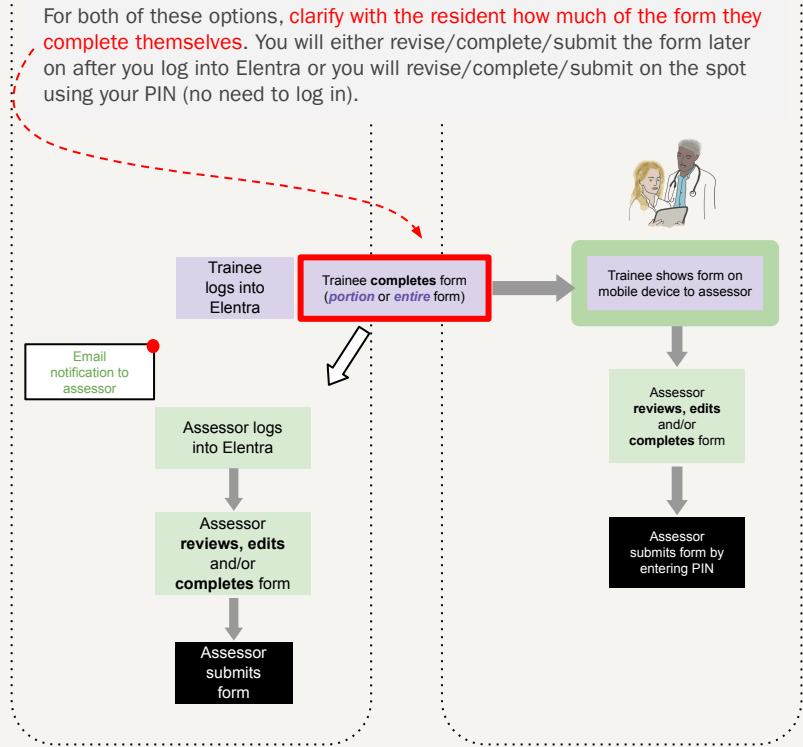
Assessor submits second form

Trainee-triggered assessment
Choose one of the 4 options below

Email blank form

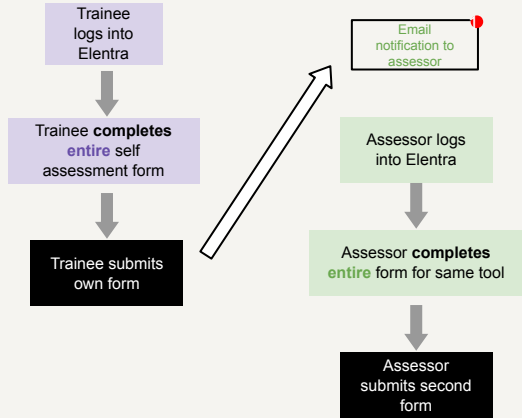The assessor will receive an email notification to complete a blank assessment.

Trainee logs into Elentra → Email notification to assessor

Assessor logs into Elentra ↓ Assessor **completes** *entire* form ↓ Assessor submits form

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Complete and confirm via email

Complete and confirm via PIN

For both of these options, clarify with the resident how much of the form they complete themselves. You will either revise/complete/submit the form later on after you log into Elentra or you will revise/complete/submit on the spot using your PIN (no need to log in).

Trainee logs into Elentra → Trainee **completes** form (*portion* or *entire* form) → Trainee shows form on mobile device to assessor

Email notification to assessor

Assessor logs into Elentra ↓ Assessor **reviews, edits** and/or **completes** form ↓ Assessor submits form

Assessor **reviews, edits** and/or **completes** form ↓ Assessor submits form by entering PIN

Self Assessment, then blank email form

Complete an assessment based on the selected tool. Upon completion, the assessor will receive a blank assessment task with the same assessment tool.

Trainee logs into Elentra ↓ Trainee **completes** *entire* self assessment form ↓ Trainee submits own form → Email notification to assessor

Assessor logs into Elentra ↓ Assessor **completes** *entire* form for same tool ↓ Assessor submits second form

Assessor-triggered assessment

Trainee does not trigger, complete, or submit anything

Assessor logs
into Elentra

Assessor **completes**
entire form

Assessor
submits form