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
**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

Assessor logs into Elentra

Assessor completes entire form

Assessor submits form

Email notification to assessor

The assessor will receive an email notification to complete an assessment
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)

Assessor logs into Elentra

Assessor reviews, edits and/or completes form

Assessor submits form

Email notification to assessor
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 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

Assessor logs into Elentra

Assessor **completes entire** form for same tool

Assessor submits second form

Email notification to assessor
Trainee-triggered assessment
Choose one of the 4 options below

1. **Email blank form**
The assessor will receive an email notification to complete a blank assessment.

2. **Complete and confirm via email**
   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).

3. **Complete and confirm via PIN**

4. **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.
Assessor-triggered assessment

Trainee does not trigger, complete, or submit anything

Assessor logs into Elentra

Assessor completes entire form

Assessor submits form