

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.

Elentra User Guide Updates

Date	Version Number	Details of Updates
August 27, 2021	Version 1.1	<ul style="list-style-type: none"> • Addition of 1.7 EPA Encyclopedia (All Users) • Addition of 2.1.7 Declining EPAs (All Faculty) • Update to 2.3 Narrative Notes (All Faculty) • Update to section 5.1.5 Concern Flags and Form Feedback (Program Directors) • Update to section 6.2.5 Concern Flags and Form Feedback (Program Administrators) • Update to 7.3 Managing CBME Progress (Residents) • Update to 7.4 Narrative Notes (Residents) • Addition of 7.5 NEW Resident Dashboard (Residents)

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1.0 ALL USERS

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

The topics discussed in this section include:

- 1.1 Support Contacts
- 1.2 Browser Limitations
- 1.3 Saving Elentra as a Shortcut on Desktop and/or Mobile
 - 1.3.1 Saving as a Shortcut on Desktop
 - 1.3.2 Saving as a Shortcut on iOS Devices
 - 1.3.3 Saving as a Shortcut on Android Devices
- 1.4 Logging into Elentra
 - 1.4.1 Elentra Credentials
 - 1.4.2 Main Page Information
- 1.5 Profile Features – Set PIN, Secondary Email, etc.
 - 1.5.1 Setting PIN
 - 1.5.2 Secondary Email
- 1.6 Bookmarks
- 1.7 EPA Encyclopedia

1.1 SUPPORT CONTACTS

Contact	Email
<p>Elenra Support 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>Elenra.support@schulich.uwo.ca</p>
<p>Schulich Helpdesk – Schulich IT issues unrelated to Elenra</p>	<p>Website link.</p>
<p>WTS – UWO password reset</p>	<p>Website link.</p>
<p>Postgraduate Medical Education Policies</p>	<p>Website link.</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 (unsafe)

2

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

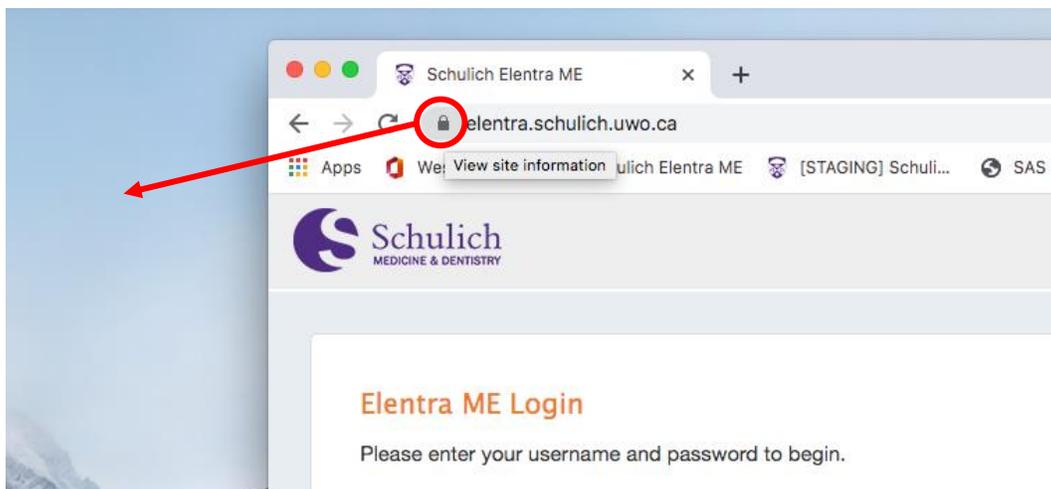
Elentra can be used on any desktop and/or iOS or Android device. The following section of this guide shows how to save Elentra as a shortcut on your device in order to navigate to the website easily for continued use.

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.

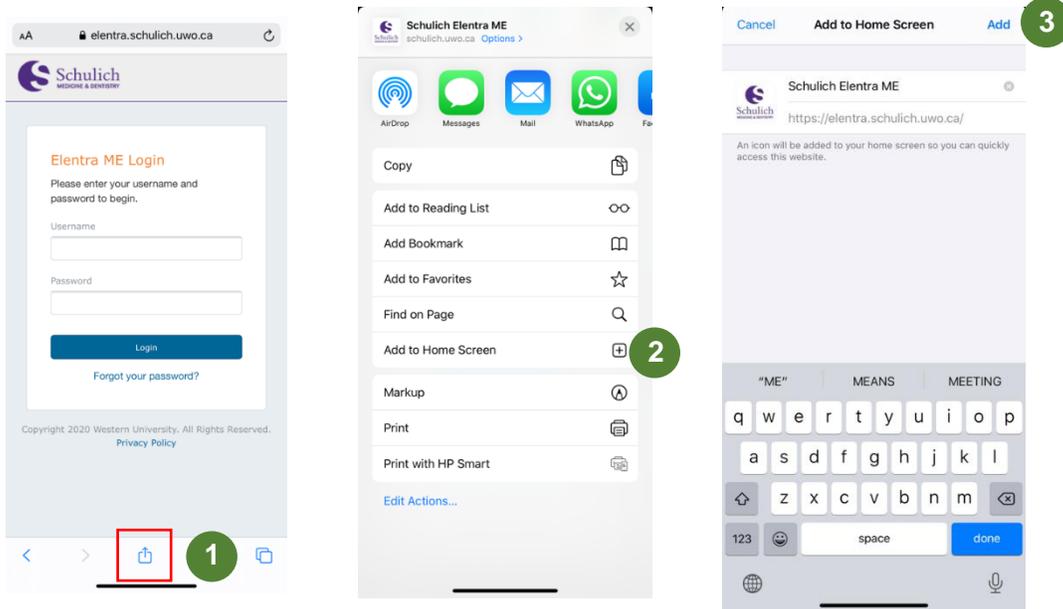


1.3.2 Saving as a Shortcut on iOS Devices

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).

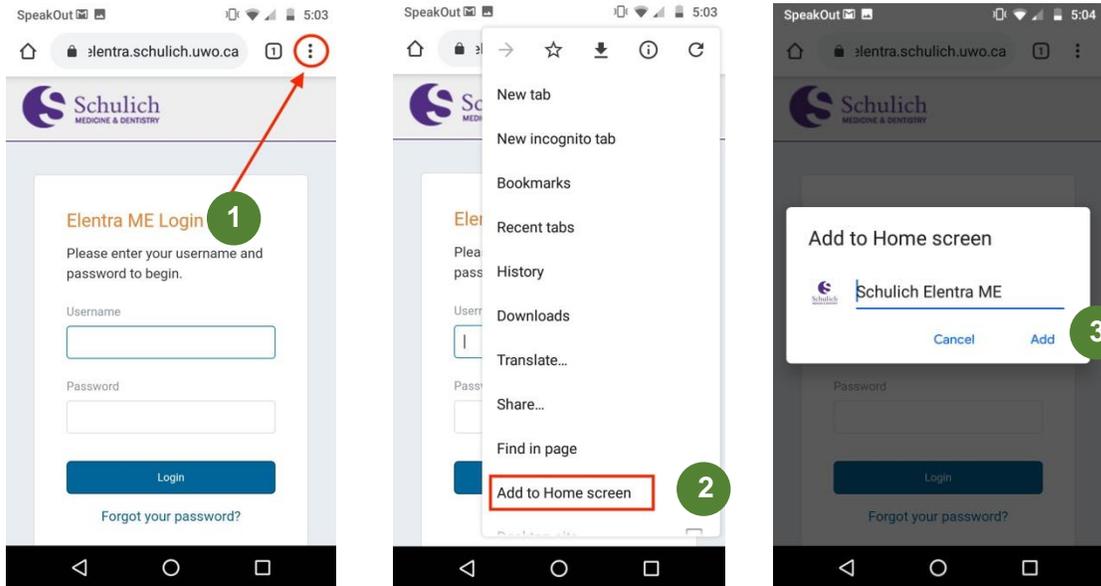
Note: the following screenshots are from Safari. Depending on the app you are using, your screen may be slightly different.



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.

1.4.2 Main Page Information

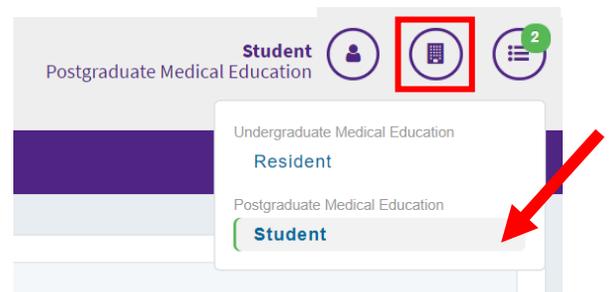
When logging into Elentra, you will notice two or three icons in the top right corner of the page, depending on your user permissions. Below gives a brief overview of what these three icons contain. This manual will refer to these areas often and will explain their functionality in greater detail.

- 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.

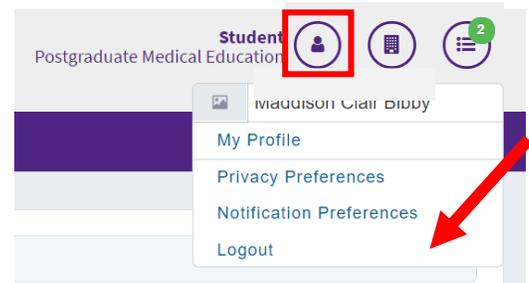


- 2 **Switch between UME & PGME*** – after clicking on the icon indicated, you will then see a drop down where you can choose between UME and PGME. You won't see this unless you are a member of both organizations.

***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.

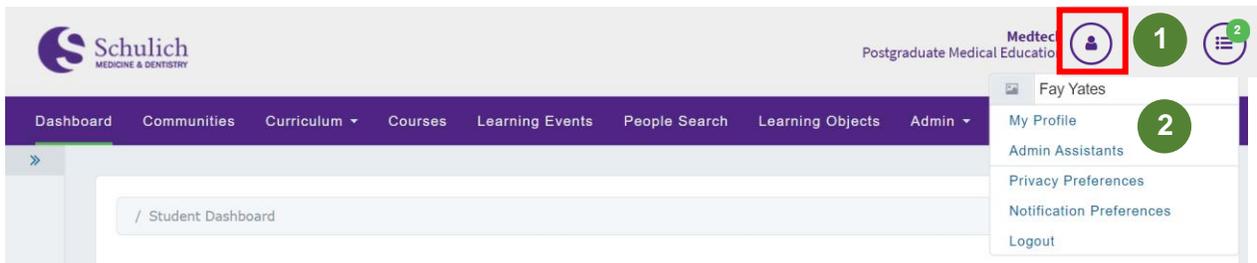


1.5 PROFILE FEATURES

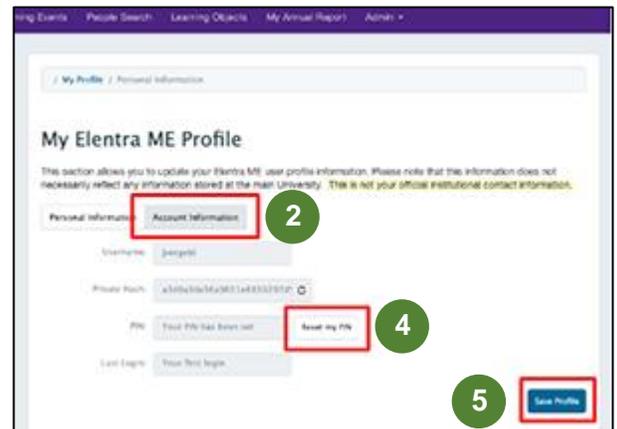
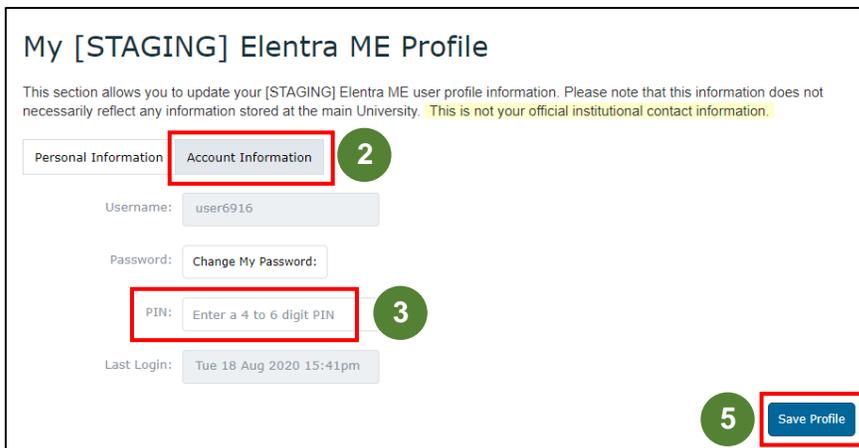
1.5.1 Setting a PIN

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).



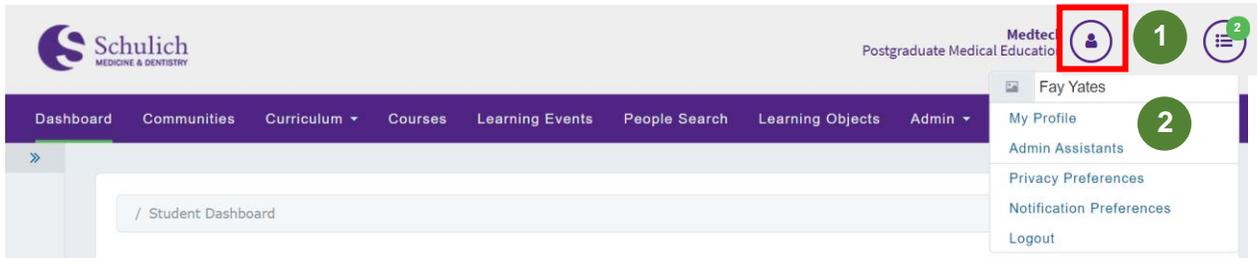
2. Toggle to Account Information (2). If you have not yet set up a PIN, you can enter it in the corresponding boxes (3). If you have already set up a PIN, and wish to reset it, click Reset PIN (4). Finally, click Save Profile (5).



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).

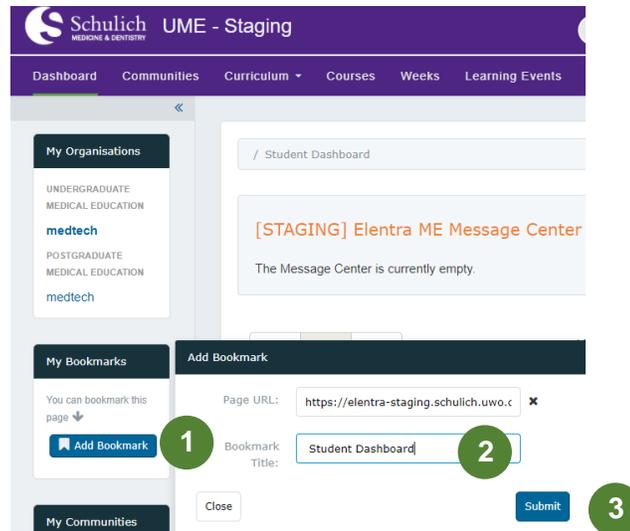
My [STAGING] Elentra ME Profile

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

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"/>

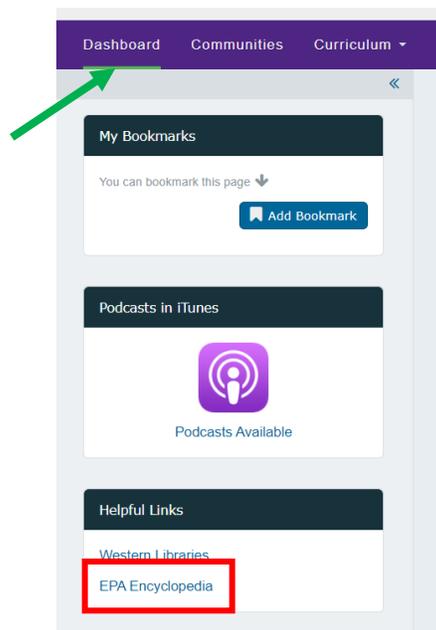
1.6 BOOKMARKS

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.



1.7 EPA ENCYCLOPEDIA

Users have access to the EPA Encyclopedia of their program(s). The EPA Encyclopedia can be accessed from the main Dashboard under Helpful Links in the left side menu.



This will then take you to the EPA Encyclopedia of your program(s) where you can search for EPAs (1), view detailed descriptions (2) as well as the EPA Program map (3). If you have multiple programs, with updated CBME versions you can use the drop box (4) to toggle to the corresponding information.

EPA Encyclopedia

Orthopaedic Surgery

1

Orthopaedic Surgery

CBME Version: Version 2

4

Transition to Discipline Hide ^

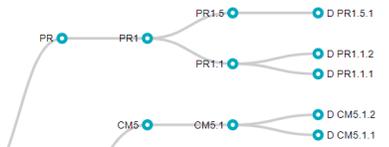
D1
Assessing and diagnosing patients with orthopedic illness or injury

Detailed Description 2

This EPA focuses on performing a focused history and appropriate physical examination, and ordering basic investigations. - This EPA also includes proposing a differential diagnosis and management plan for common orthopedic presentations with support and feedback from senior residents and attending orthopedic surgeon. - This EPA does not include the execution of a management plan. - This EPA may be observed in the inpatient setting, emergency department and outpatient clinic.

Program Map 3

D1



```

graph LR
    PR((PR)) --- PR1((PR1))
    PR1 --- PR15((PR1.5))
    PR1 --- PR11((PR1.1))
    PR15 --- DPR151((D PR1.5.1))
    PR11 --- DPR112((D PR1.1.2))
    PR11 --- DPR111((D PR1.1.1))
    CMS((CMS)) --- CMS51((CMS5.1))
    CMS51 --- DCMS512((D CMS5.1.2))
    CMS51 --- DCMS511((D CMS5.1.1))
    
```

2.0 ALL FACULTY

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

The topics discussed in this section include:

2.1 EPAs

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

2.2 Viewing Assessment Feedback from Residents

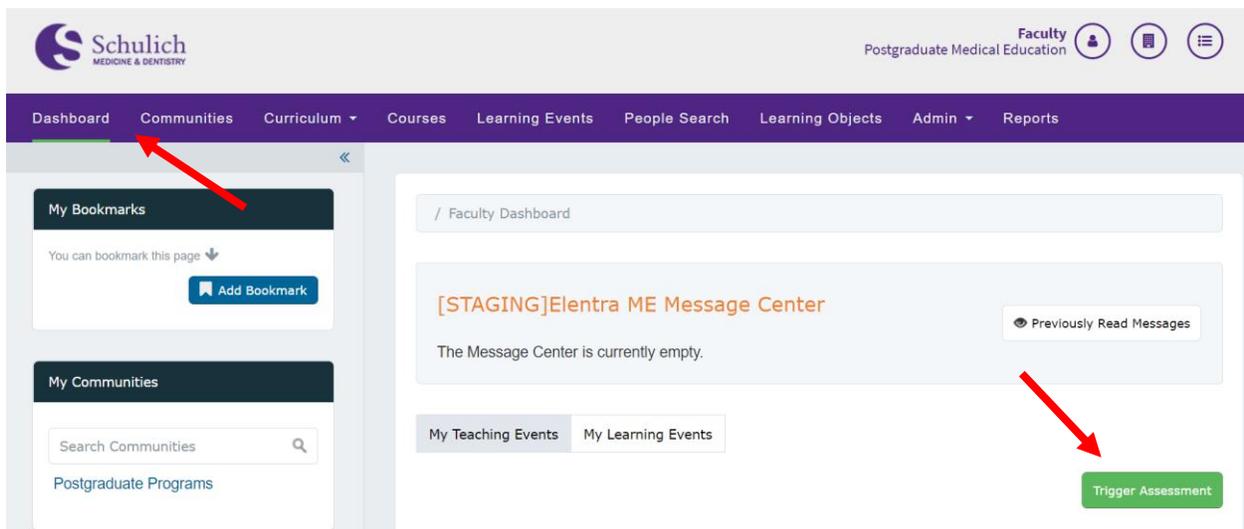
2.3 Narratives

2.1 EPAS

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

2.1.1 Triggering EPAs

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



2.1.2 Resident Triggered EPAs

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

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

1. **Blank form** – With the blank form method, the resident would log into Elentra and trigger the assessment with a blank form. This would then send an email notification to the assessor. The assessor would then need to log into Elentra and complete the **entire** form, and then submit.
2. **Complete and confirm via email** – With this method, the resident can log in and trigger the assessment. The resident can also complete the form, either in full or partially. An email notification would also be given to the assessor, who can then log into Elentra to review, edit, and/or complete the form prior to submitting.

- 3. Complete and confirm via PIN** – With this method, the resident can log in and trigger the assessment. The resident can also complete the form, either in full or partially. The resident can then share the form with the assessor via a mobile device. The assessor can then review, edit and/or complete the form. The assessor would then submit the form by entering the PIN. With this method, the assessor does not need to log into Elentra.
- 4. Self assessment, then blank email form** – With the self-assessment, the resident would log into Elentra and complete and submit the entire form. An email notification would then be sent to the assessor, who can then log into Elentra. From here, the assessor completes an entire form for the same task and submits the second form.

2.1.3 Faculty Triggered EPAs

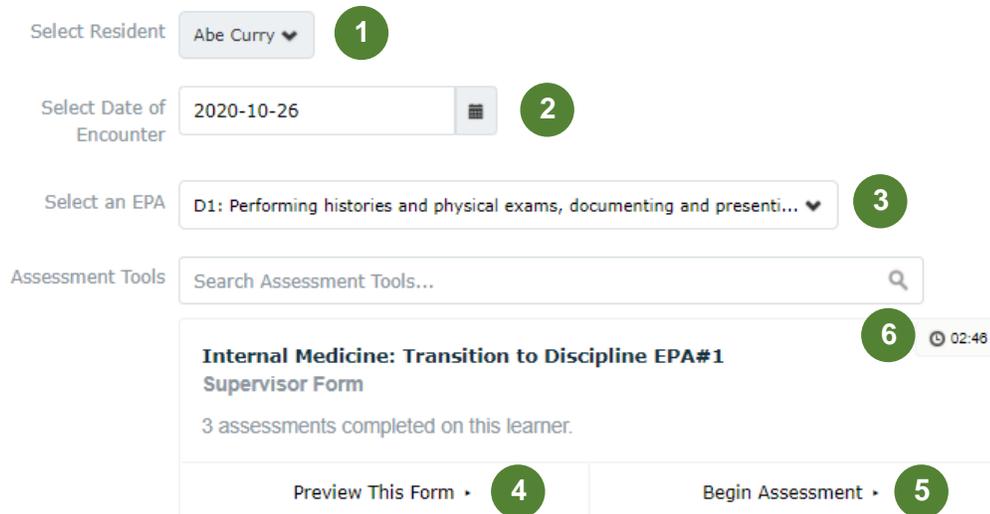
After triggering an assessment, faculty will have to complete the EPA assessment form. Please note that for assessments sent to faculty by residents, the amount of information needed to fill in may vary. Refer to [2.1.2](#) for an explanation of the various methods.

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

1. Select the resident **(1)** for whom you wish to complete the EPA assessment. Additionally, you may then be prompted to select which program you wish to complete the EPA from. This will only be present if the resident is enrolled in more than one program. Next, select the date of the encounter **(2)** and the EPA **(3)** from the drop-down menu.

You will then be prompted to either **Preview This Form (4)** or **Begin Assessment (5)**. The time shown in the top right corner **(6)** indicates the average time taken to complete this assessment form.

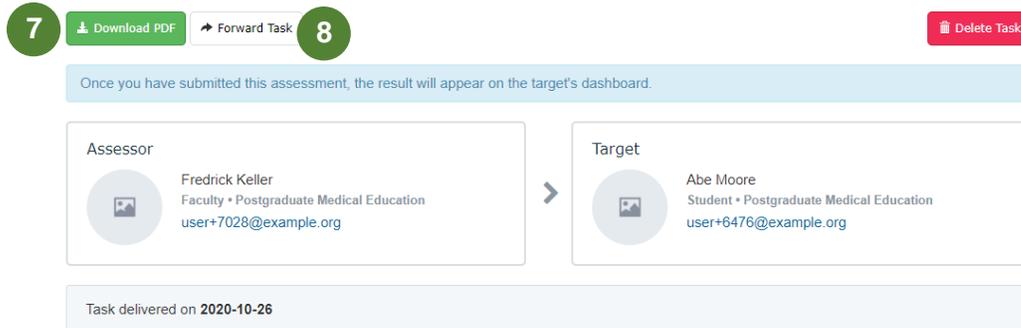
Assessment Tools



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...' (4). Below the search bar, a card displays 'Internal Medicine: Transition to Discipline EPA#1 Supervisor Form' with a timer '02:46' (6) and '3 assessments completed on this learner.' At the bottom of the card are two buttons: 'Preview This Form' (4) and 'Begin Assessment' (5).

- 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 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 is a card with two columns: 'Assessor' and 'Target'. The 'Assessor' column shows 'Fredrick Keller, Faculty • Postgraduate Medical Education, user+7028@example.org'. The 'Target' column shows 'Abe Moore, Student • Postgraduate Medical Education, user+6476@example.org'. Below the card is a grey 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

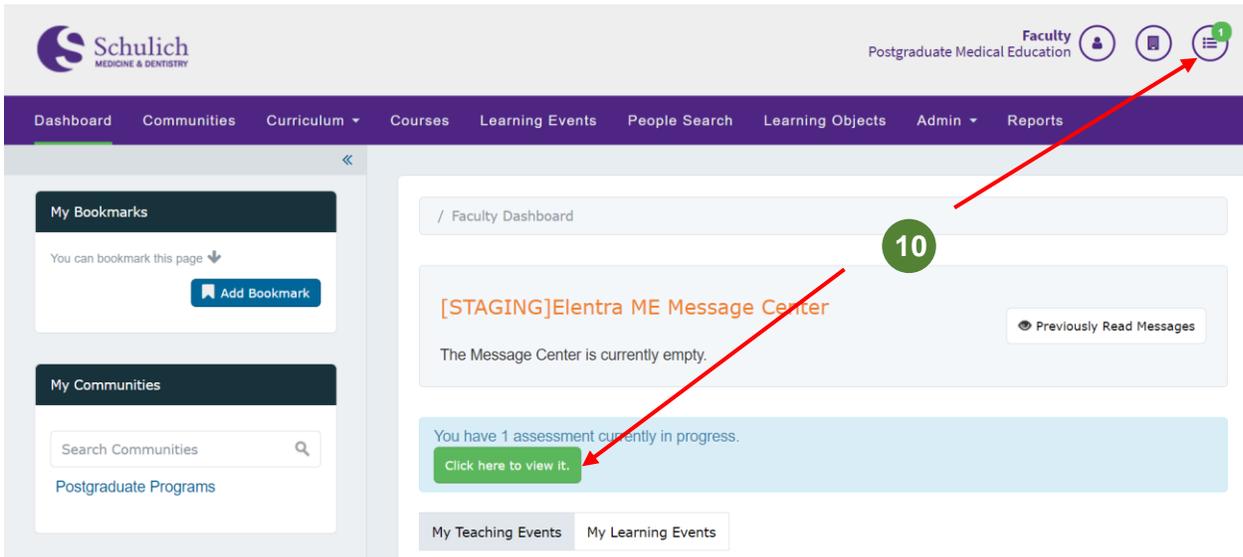
No
 Yes

9

Save as Draft or Submit

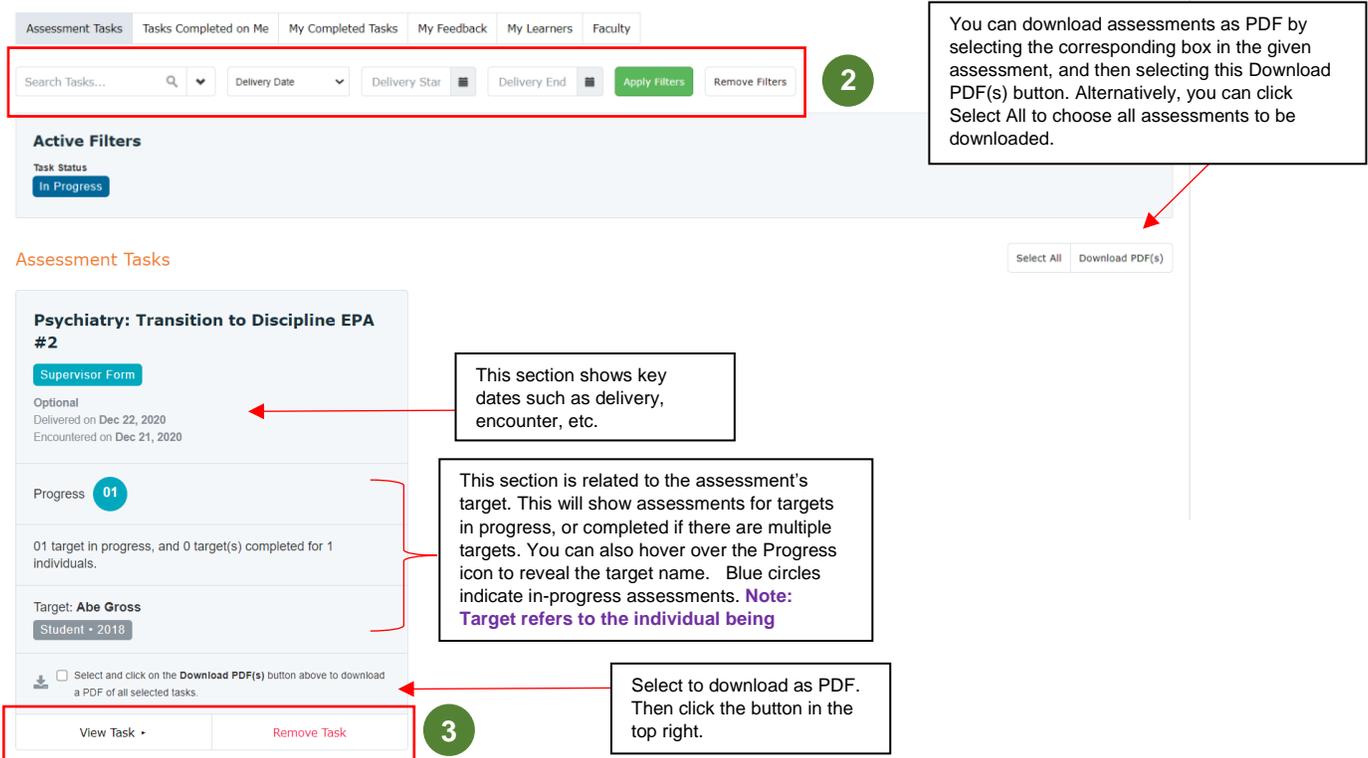
2.1.4 Completing EPAs Saved as Draft

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 '10'. Below this, a message center section is visible, containing the text "[STAGING]Elentra ME Message Center" and "The Message Center is currently empty." Below the message center, a blue notification bar states "You have 1 assessment currently in progress." with a green button labeled "Click here to view it." A red arrow points from this button to the '10' in the green circle. The dashboard includes 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.

- 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, dropdown menus for 'Delivery Date', 'Delivery Start', and 'Delivery End', and buttons for 'Apply Filters' and 'Remove Filters'. A callout labeled '2' points to this section, 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' area 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/encounter dates, a progress indicator '01', and target information 'Abe Gross (Student - 2018)'. A callout labeled '3' points to the 'View Task' and 'Remove Task' buttons at the bottom of the card, stating: 'Select to download as PDF. Then click the button in the top right.' Another callout points to the 'Progress' section, 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 assessed.' A third callout points to the dates, stating: 'This section shows key dates such as delivery, encounter, etc.'

2.1.5 EPA Expiry and Email Reminders

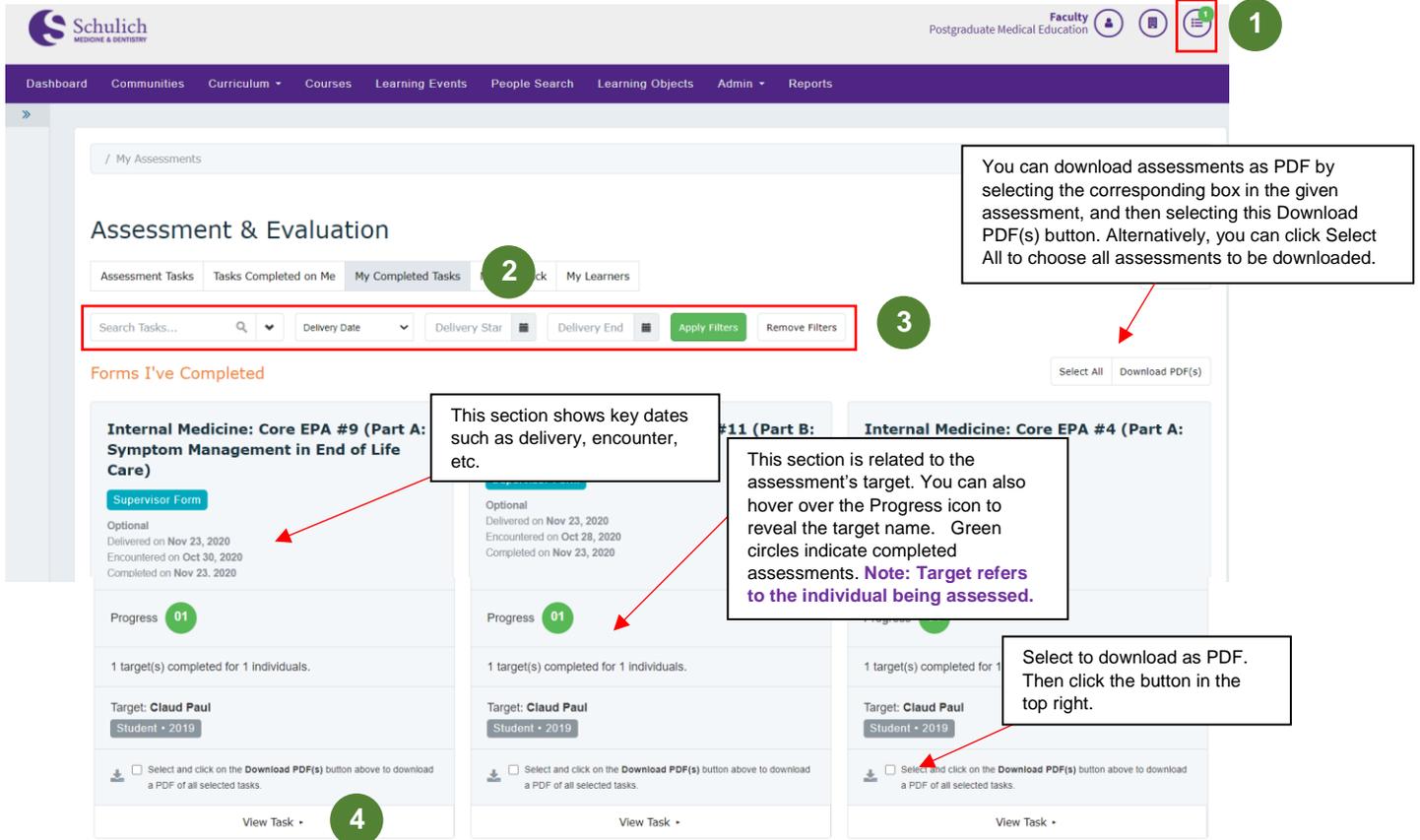
Incomplete EPA assessments will automatically expire 30 days after the initial trigger date. This timeframe will be revisited often to determine an optimal balance between the quality and prioritization of EPA completion with adapting to our new CBME culture.

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' section of the Schulich system. It features a navigation menu at the top with 'Assessment & Evaluation' highlighted. Below the menu, there are tabs for 'Assessment Tasks', 'Tasks Completed on Me', 'My Completed Tasks' (marked with a green circle 2), and 'My Learners'. A search bar and filter options (Delivery Date, Delivery Star, Delivery End) are present, with a red box around them and a green circle 3. A 'Download PDF(s)' button is visible in the top right corner, with a red box around it and a green circle 1. Below the search bar, there are three assessment cards for 'Internal Medicine: Core EPA #9 (Part A: Symptom Management in End of Life Care)', 'Internal Medicine: Core EPA #11 (Part B: ...)', and 'Internal Medicine: Core EPA #4 (Part A: ...)'. Each card shows a 'Progress' indicator (01), a 'Target' (Claud Paul), and a 'View Task' button. A red box around the 'View Task' button is labeled with a green circle 4. A 'Download PDF(s)' button is also present at the bottom of each card. A 'Select All' button is located above the cards. Several callout boxes provide additional information: one points to the 'Download PDF(s)' button in the top right, another points to the 'My Completed Tasks' tab, a third points to the filter options, a fourth points to the 'View Task' button, and a fifth points to the 'Download PDF(s)' button on the card. A sixth callout box explains that the section shows key dates such as delivery, encounter, etc. A seventh callout box explains that the section is related to the assessment's target and that green circles indicate completed assessments, with a note that 'Target refers to the individual being assessed'. An eighth callout box points to the 'Download PDF(s)' button on the card and says 'Select to download as PDF. Then click the button in the top right.'

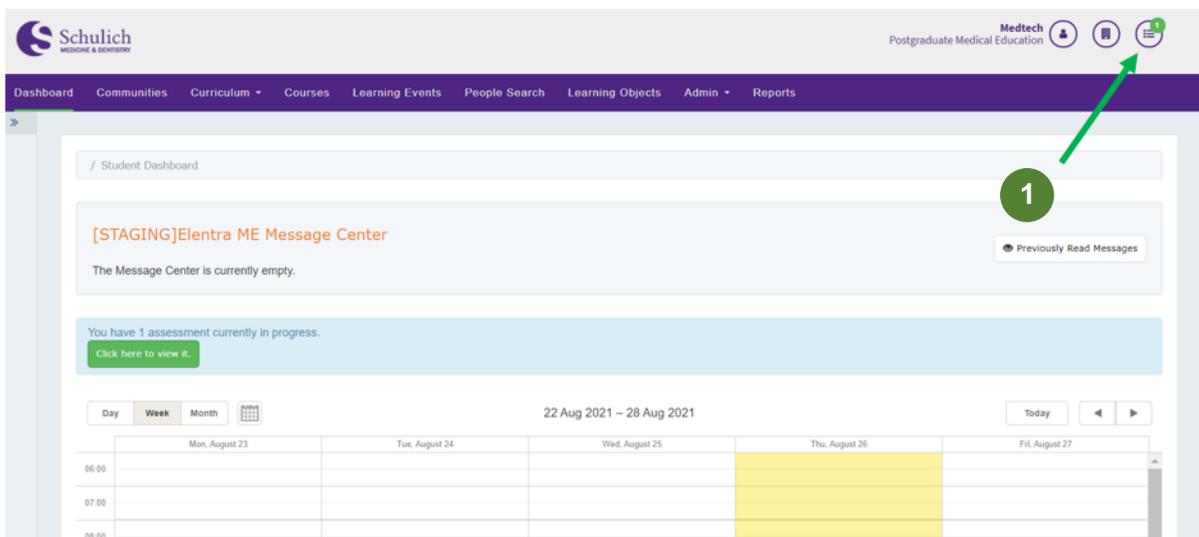
2.1.7 Declining EPAs

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

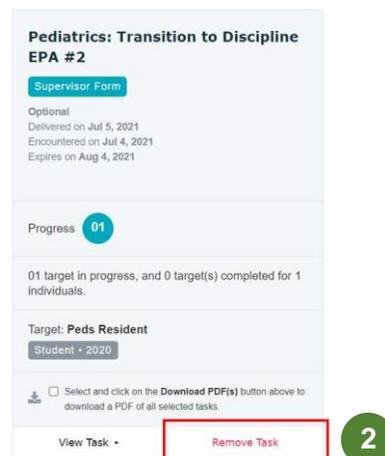
- Duplication** – An EPA for the same event may be sent more than once. Please make note of the duplication in the comments when declining the EPA.
- Test or Training EPA** – An EPA may have been sent to you to practice using the system or to train others. This is typically triggered by another faculty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

- **Unaware an assessment would be requested** – An EPA may be declined if the assessor was unaware that an EPA would be triggered prior to an observed activity. Please provide reasons for declining the EPA in the comments, and provide feedback to the trainee to discuss the assessment prior to the activity in the future.
- **Did not work with the learner** – An EPA may be declined if the assessor was sent an EPA request for an activity they did not observe. Please note this in the comments when the EPA is declined.

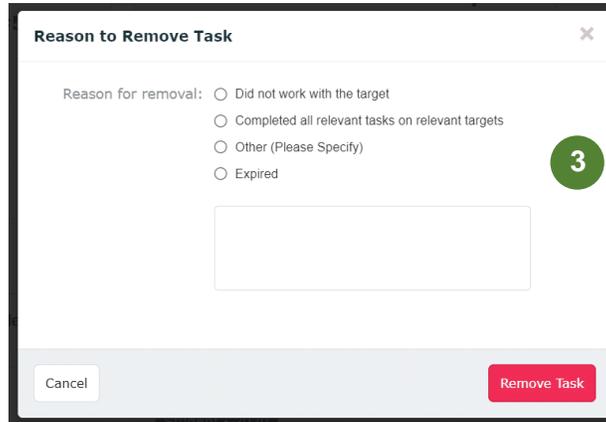
1. Once logged into Elentra, click on your outstanding assessments (1) to view any EPAs that residents have initiated to you.



2. On the EPA you wish to decline, simply click on Remove Task (2). This will open a pop up where you will have to provide a reason as to why you wish to remove the task.



3. Choose a reason from removal from the list, or choose Other (3) if your reason isn't listed and add a description in the text box.



Reason to Remove Task

Reason for removal:

- Did not work with the target
- Completed all relevant tasks on relevant targets
- Other (Please Specify) 3
- Expired

Cancel Remove Task

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

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

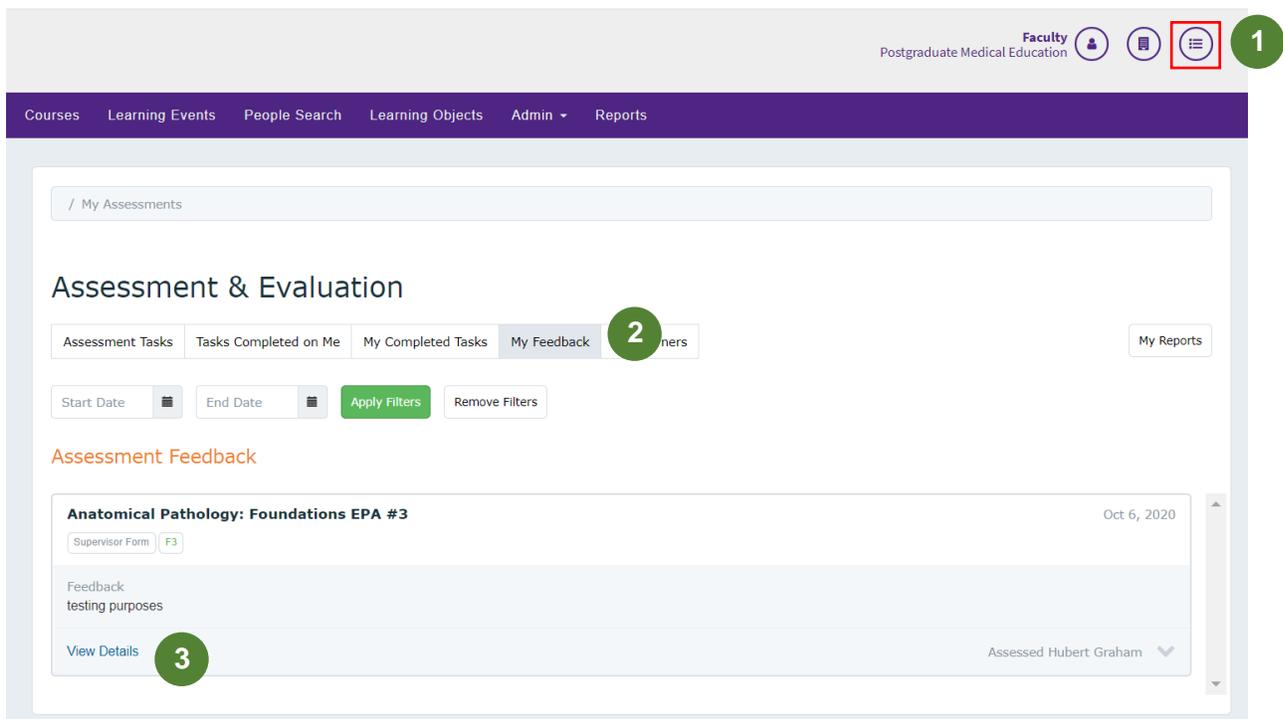
More information on this can be found in the reports section of this guide ([8.0](#)).

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).

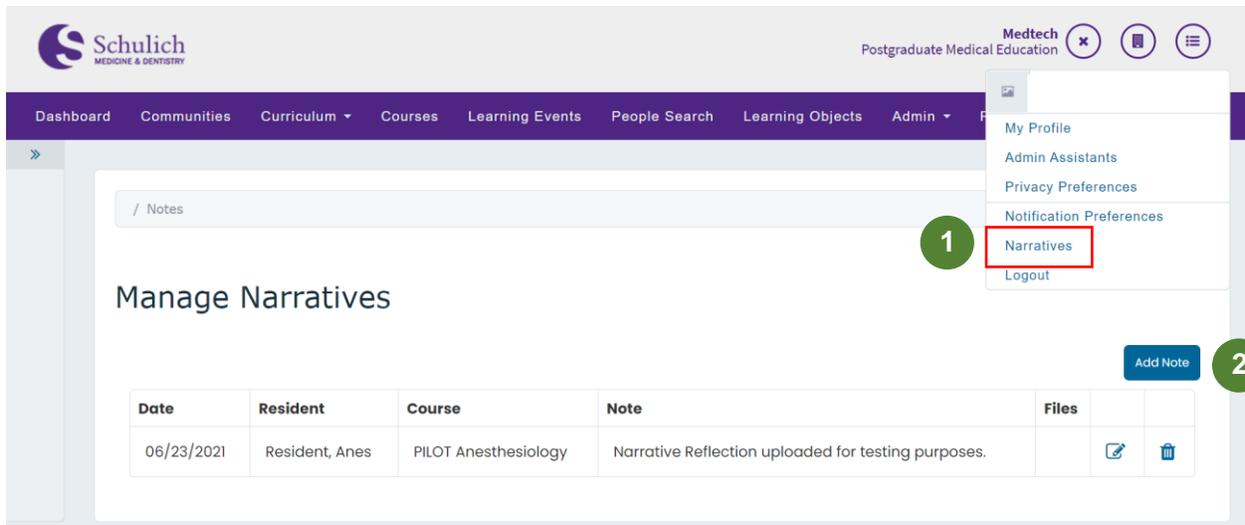


The screenshot displays the user interface for viewing assessment feedback. At the top right, there is a navigation bar with icons for Faculty, Postgraduate Medical Education, a user profile, a calendar, and a menu icon (1). Below this is a purple navigation bar with links for Courses, Learning Events, People Search, Learning Objects, Admin, and Reports. The main content area is titled "My Assessments" and "Assessment & Evaluation". It features several tabs: Assessment Tasks, Tasks Completed on Me, My Completed Tasks, My Feedback (2), and My Reports. Below the tabs are filters for Start Date and End Date, with buttons for Apply Filters and Remove Filters. The "Assessment Feedback" section shows a list of feedback items. The first item is "Anatomical Pathology: Foundations EPA #3" dated Oct 6, 2020, with a "Supervisor Form F3" tag. The feedback text is "testing purposes". A "View Details" link (3) is visible next to the feedback item. The item is assessed by "Hubert Graham".

2.3 NARRATIVE NOTES

Narrative Notes allow Faculty members to be able to leave constructive comments and/or upload documents related to a CBME learner's progress.

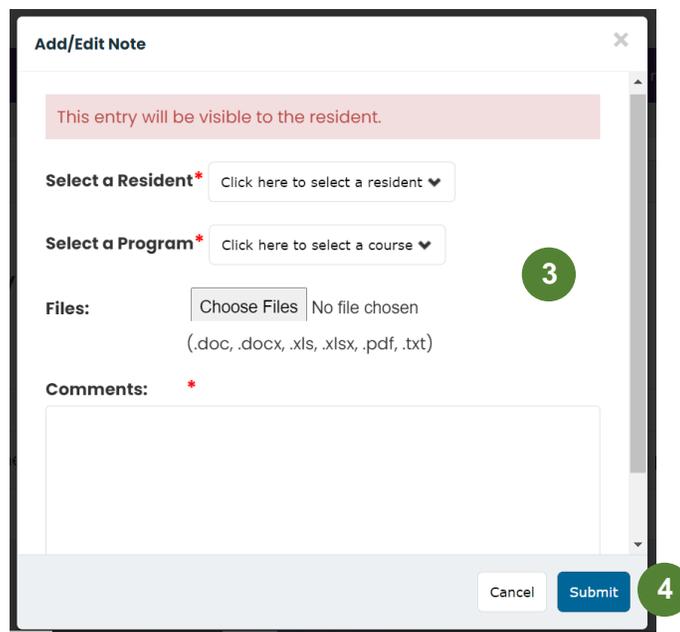
1. Under the profile icon, select Narratives (1) from the drop-down menu. Click Add Note (2).



The screenshot shows the 'Manage Narratives' interface. At the top, there is a navigation bar with 'Postgraduate Medical Education' and a profile icon. A dropdown menu is open from the profile icon, showing options: My Profile, Admin Assistants, Privacy Preferences, Notification Preferences, **Narratives** (highlighted with a red box and a green circle labeled '1'), and Logout. Below the navigation bar, the page title is 'Manage Narratives'. On the right side, there is a blue 'Add Note' button with a green circle labeled '2' next to it. Below the button is a table with the following data:

Date	Resident	Course	Note	Files
06/23/2021	Resident, Anes	PILOT Anesthesiology	Narrative Reflection uploaded for testing purposes.	 

2. Next, fill in the mandatory fields (3): Select a Resident, Select a Program, and add Comment. Optionally, upload a document to attach to the narrative note. Click Submit (4).



The 'Add/Edit Note' form contains the following elements:

- A red warning banner: "This entry will be visible to the resident."
- A dropdown menu for "Select a Resident*" with the text "Click here to select a resident".
- A dropdown menu for "Select a Program*" with the text "Click here to select a course".
- A "Files:" section with a "Choose Files" button and the text "No file chosen (.doc, .docx, .xls, .xlsx, .pdf, .txt)".
- A "Comments:" section with a red asterisk and a text area.
- At the bottom, there are "Cancel" and "Submit" buttons. The "Submit" button is highlighted with a green circle labeled '4'.

- The Narrative Note added (as well as any others previously added) will then be displayed. You can then edit or delete your submitted reflections **(5)**. **NOTE: Residents can view Narrative Notes in the Resident Dashboard (7.5 of this guide). Narratives are also viewable in the Competence Committee Dashboard (9.0 of this guide).**

Manage Narratives

[Add Note](#)

Date	Resident	Course	Note	Files		
06/23/2021	Resident, Cardio	PILOT Cardiology	Narrative for Cardio test resident.	narrative_reflection_for_resident.docx		
06/23/2021	Resident, Anes	PILOT Anesthesiology	Narrative Reflection uploaded for testing purposes.			

5

3.0 ACADEMIC ADVISORS

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

The topics discussed in this section include:

- 3.1 How to Obtain AA Access
- 3.2 Creating AA Groups
- 3.3 Access to Dashboards of AA Learners
 - 3.3.1 Pinning an Assessment

3.1 HOW TO OBTAIN AA ACCESS

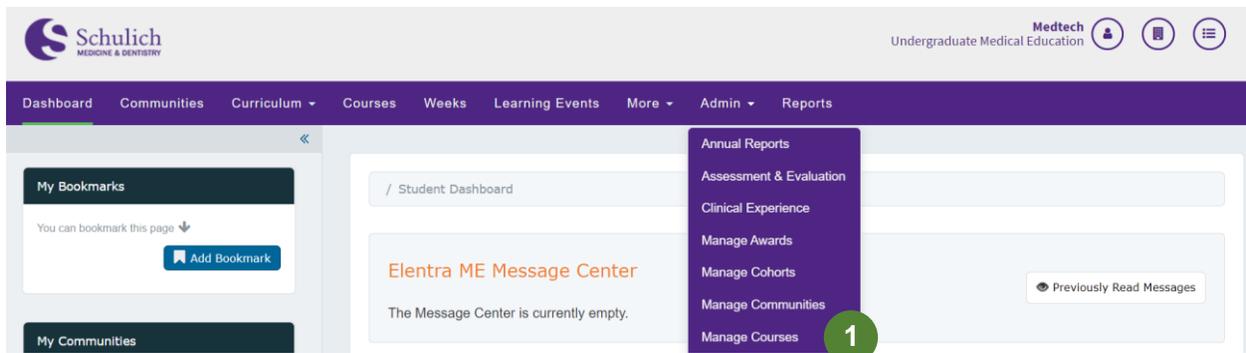
Those with PA or PD access are able to create AA groups. Anyone with a faculty Elentra account is able to be granted this access. PAs/PDs are able to set up these groups by following the instructions in section 3.2 of this guide. If support is required for this set-up, please contact elentra.support@schulich.uwo.ca.

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

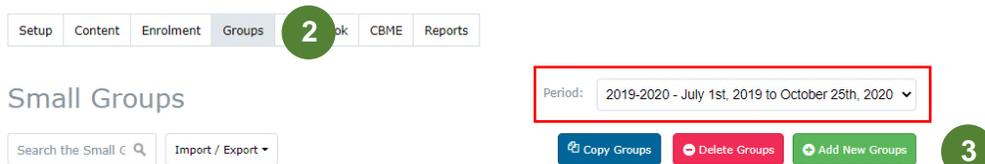
3.2 CREATING AA GROUPS

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

1. Go to Admin, Manage Courses (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*

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

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* (8)

Members to be Added on Submission

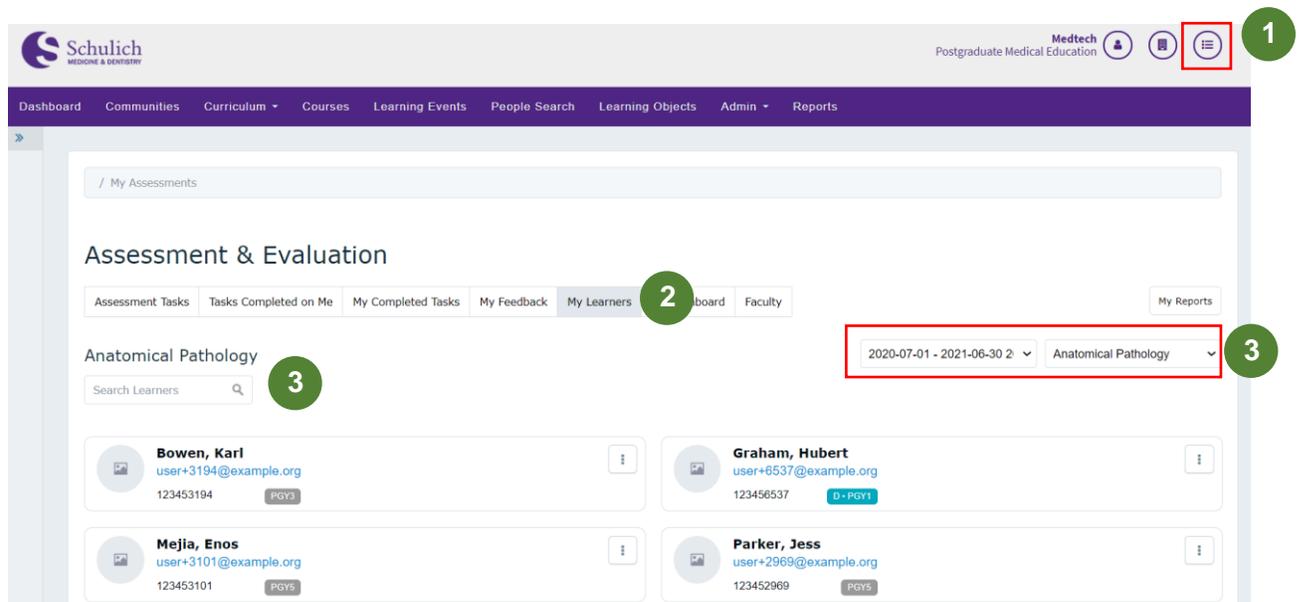
Cancel

(9) Proceed

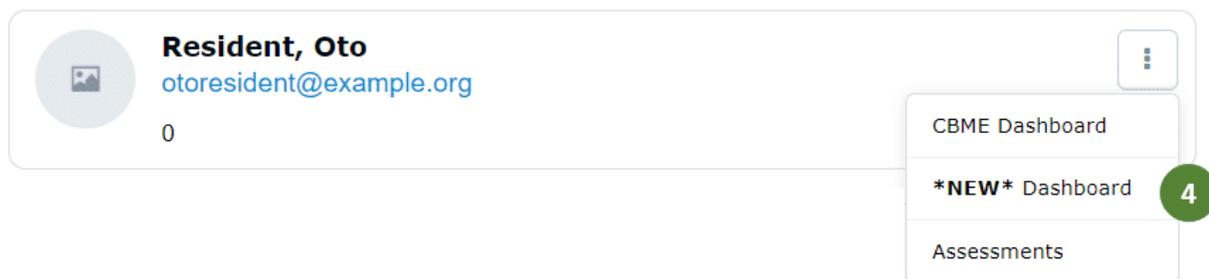
3.3 ACCESS TO DASHBOARD OF AA'S LEARNERS

Once AAs have been set up with access, they are able to access the CBME Dashboard of their assigned learners by following these steps. NOTE – Academic Advisors also have access to view the NEW Competence Committee Dashboard of their assigned residents. Information on this can be found in section [9.0](#) of this guide.

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

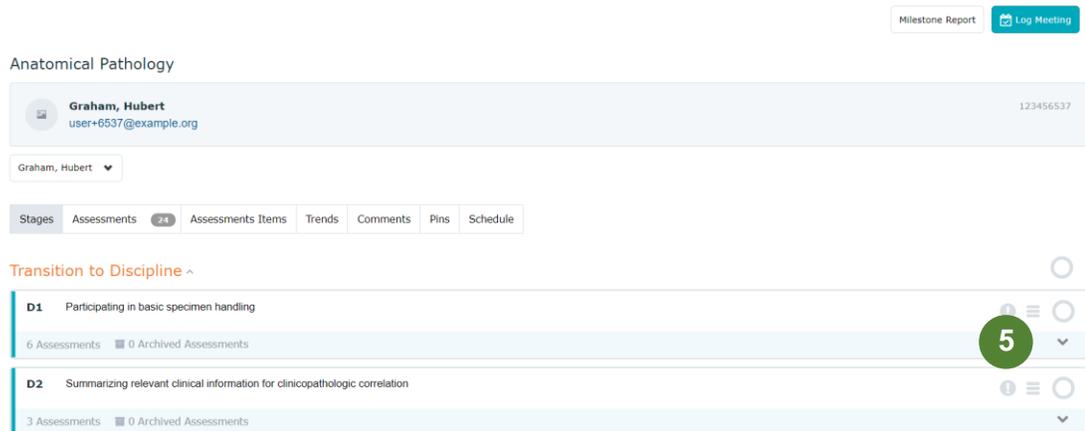


2. After navigating to the My Learners area of Elentra, click on the ellipsis of the learner you wish to view the CBME Dashboard of, and select CBME Dashboard (4).



- 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

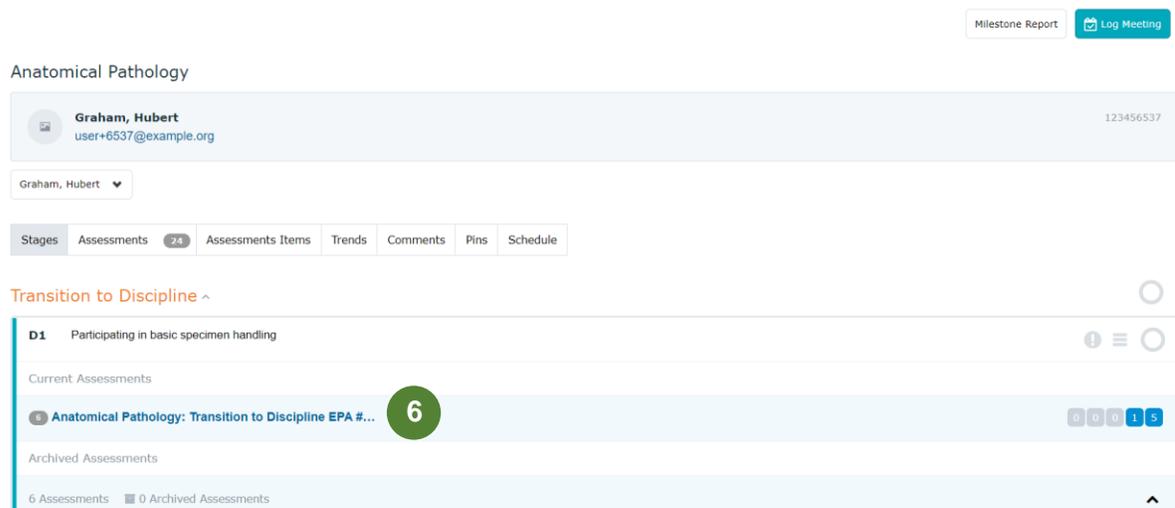
6 Assessments 0 Archived Assessments

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

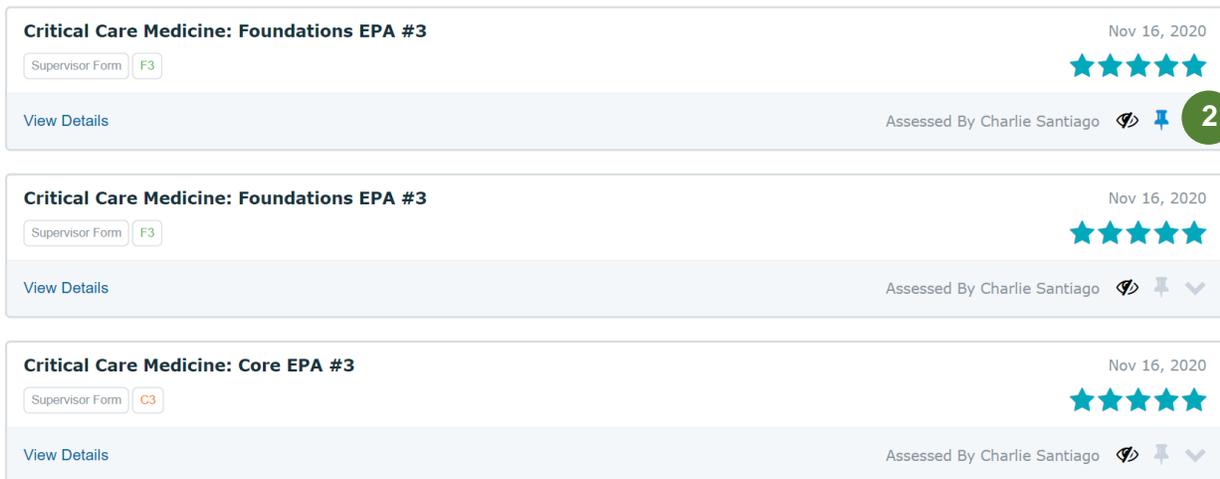
Stages Assessments 113 Assessments Items Trends Comments Pins Schedule

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 [pin icon] 2

Critical Care Medicine: Foundations EPA #3 Nov 16, 2020
Supervisor Form F3 ★★★★★
View Details Assessed By Charlie Santiago [pin icon]

Critical Care Medicine: Core EPA #3 Nov 16, 2020
Supervisor Form C3 ★★★★★
View Details Assessed By Charlie Santiago [pin icon]

- 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	Rule
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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 Achieved

4.1 HOW TO OBTAIN CC ACCESS

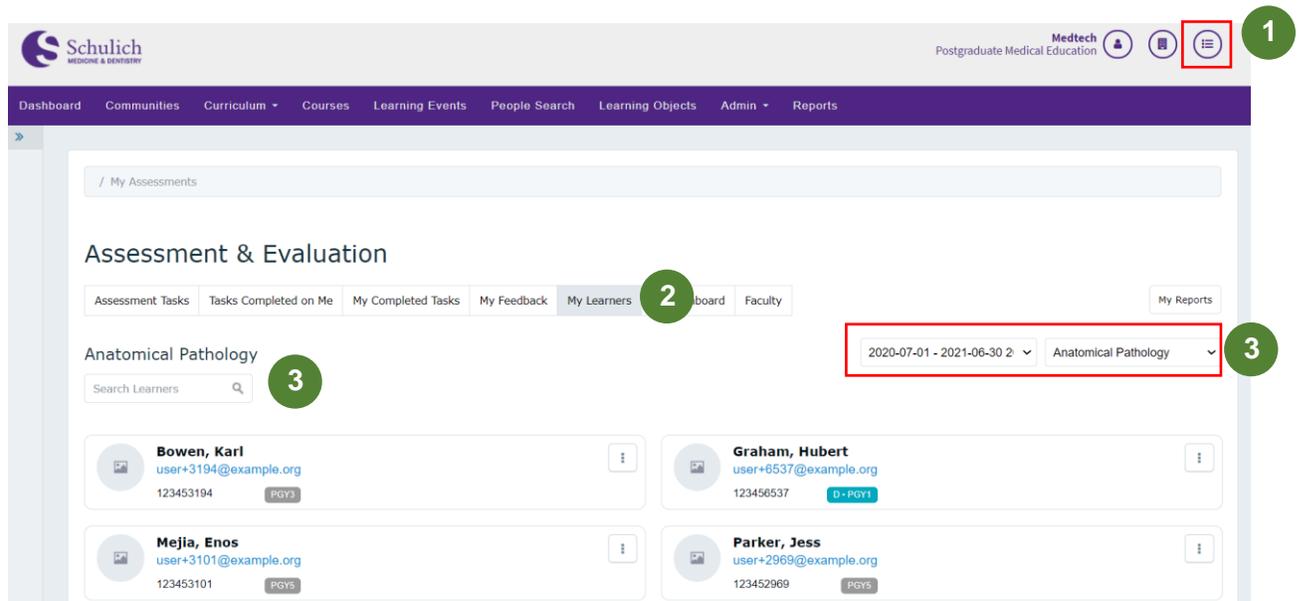
A program's PA or PD can add relevant members to their Competence Committee members list on the course set up. Adding an individual to this will grant them access to see all learners in the given program's information. Information includes access to a learner's dashboard as well as the ability to mark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

4.2 ACCESS TO DASHBOARD OF ALL LEARNERS

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

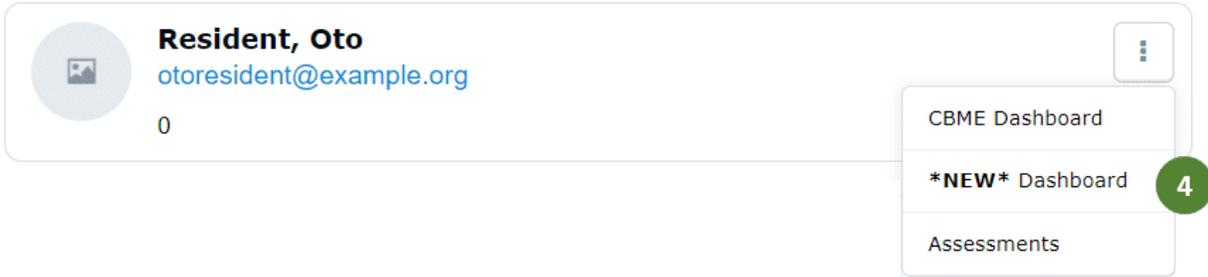
The use of the previous CBME Dashboard explained in this section will continue to be available adjacent with the New Dashboard. Any stages of training or EPA's marked as achieved will automatically be transferred into the New Dashboard.

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



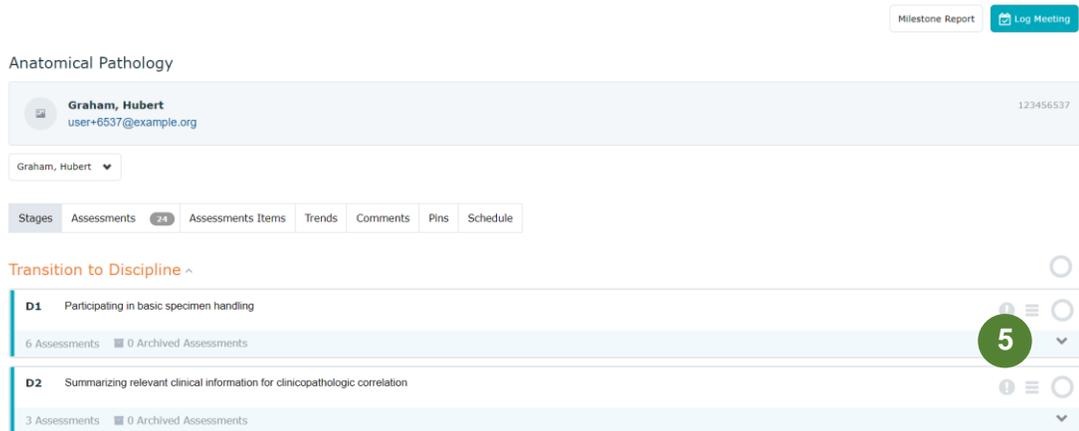
The screenshot displays the Elentra system interface. At the top right, there is a navigation icon (1) for Assessment & Evaluation. Below this, the 'My Learners' tab (2) is selected. A search box (3) is provided for finding learners. Additionally, there are dropdown menus for selecting the curriculum period and program. The main area shows a list of learners with their names, contact information, and PGY levels.

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).



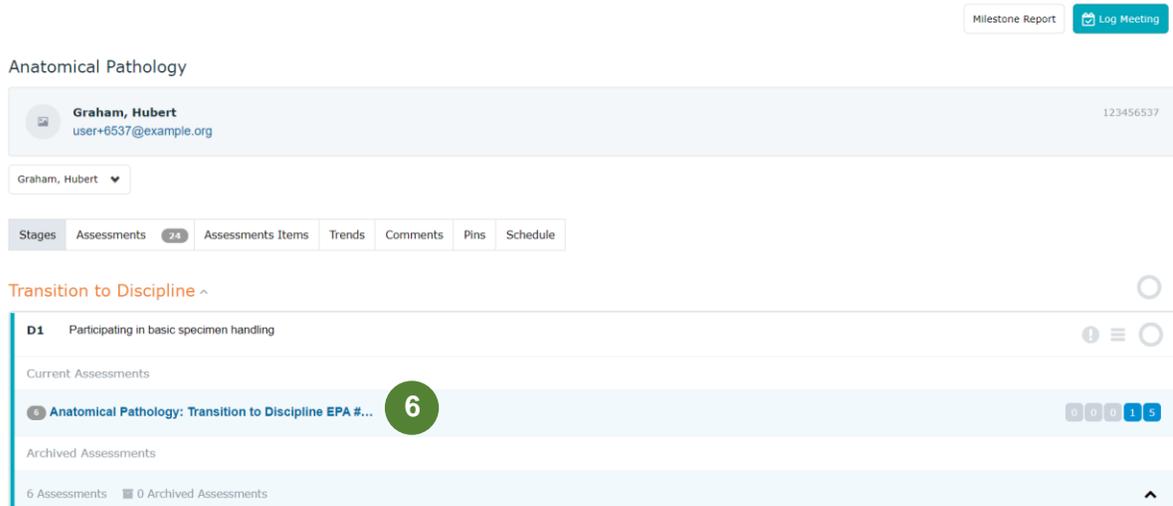
- You will then be taken to the resident's CBME Dashboard where you can view completed assessments. View further assessment details by clicking on the drop-down menu (5).

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 ACHIEVED

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

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



Transition to Discipline ^

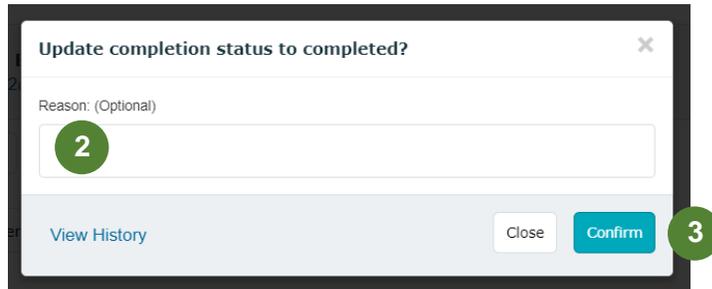
D1 Participating in basic specimen handling

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 contains 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", "Close", and "Confirm". A green circle containing the number "3" is overlaid on the "Confirm" button.

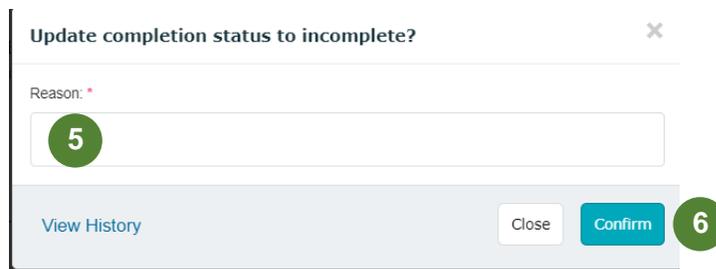
- If you wish to uncheck an EPA or stage of training, you can do so in the same method by clicking on the checkmark (4).

Transition to Discipline ^



The interface shows two rows of training items. The first row is "D1 Performing initial assessments for uncomplicated obstetric patients" with "5 Assessments" and "0 Archived Assessments". The second row is "D2 Performing an initial assessment of uncomplicated gynecologic patients" with "4 Assessments" and "0 Archived Assessments". Each row has a green checkmark icon on the right. A green circle containing the number "4" is overlaid on the checkmark of the first row.

- 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 contains a text input field labeled "Reason: *" with a green circle containing the number "5" overlaid on it. At the bottom, there are three buttons: "View History", "Close", and "Confirm". 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.

The topics discussed in this section include:

5.1 EPA Assessments

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

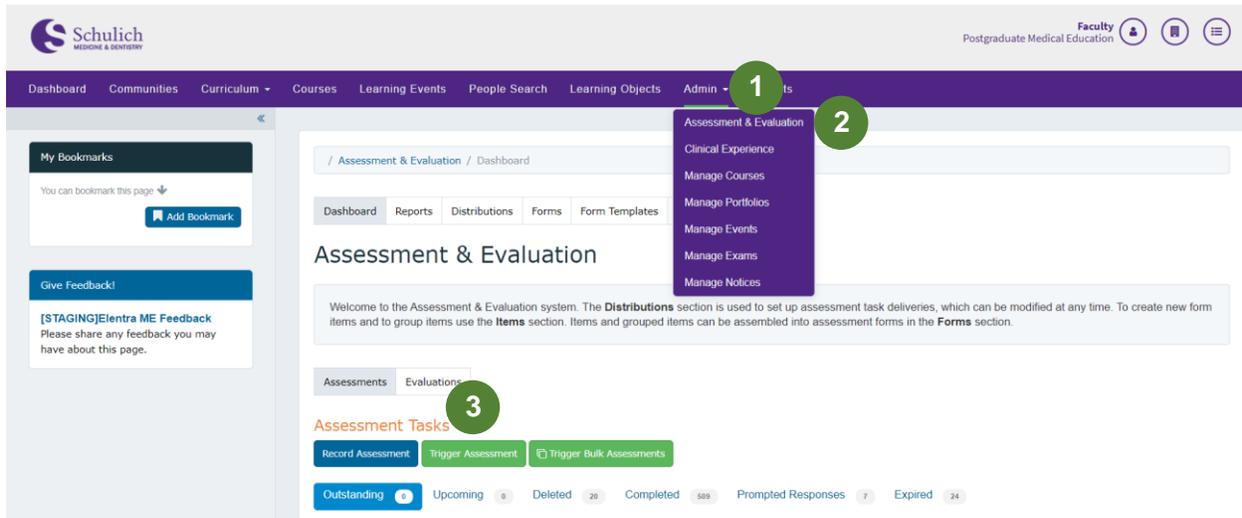
5.2 Accessing My Faculty Tab

5.1 EPA ASSESSMENTS

5.1.1 Triggering Assessments on Behalf of Others

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

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



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

Assessment Tools

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...

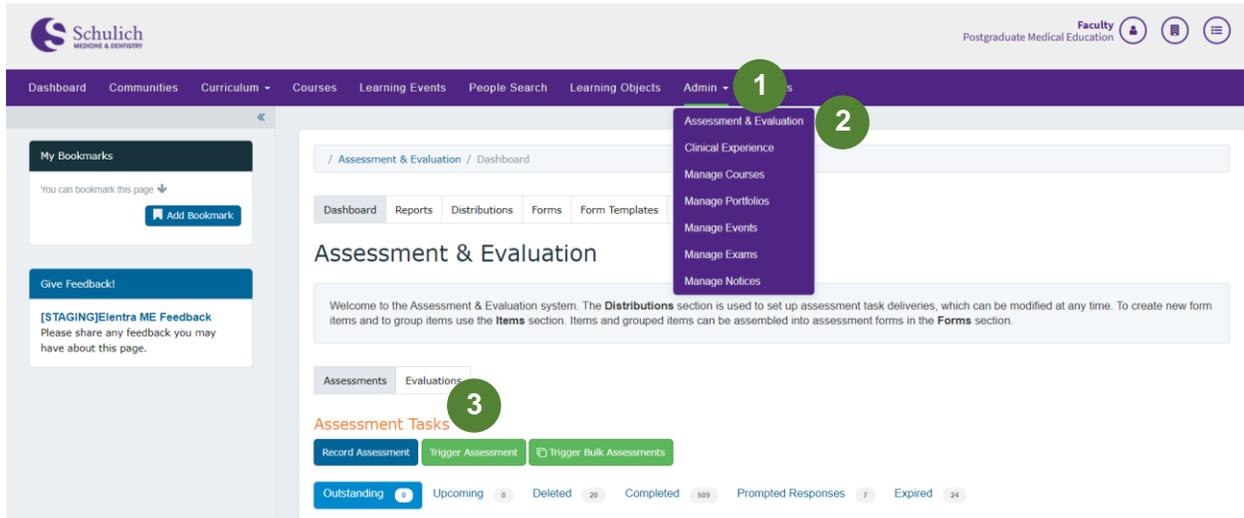
General Internal Medicine: Transition to Discipline EPA #2 (Part B) Supervisor Form
0 assessments completed on this learner

Preview This Form (5) Send Assessment (6)

5.1.2 Triggering Assessments to External Assessors

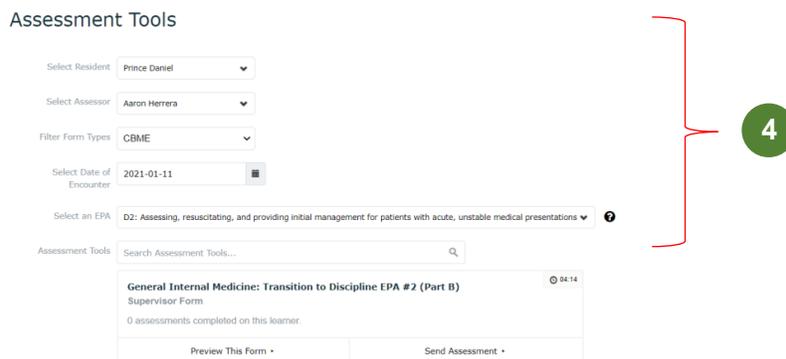
To trigger to an external assessor, the steps are similar to those in [5.1.1](#), however an extra step is required when selecting the assessor.

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



The screenshot shows the Schulich Assessment & Evaluation dashboard. The navigation menu at the top includes 'Admin' (1). A dropdown menu for 'Assessment & Evaluation' (2) is open, showing options like 'Clinical Experience', 'Manage Courses', and 'Trigger Assessment'. The 'Trigger Assessment' button is highlighted with a green circle (3). The dashboard also shows 'Assessment Tasks' and various filters for 'Outstanding', 'Upcoming', 'Deleted', 'Completed', 'Prompted Responses', and 'Expired' items.

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 fields for 'Select Resident' (Prince Daniel), 'Select Assessor' (Aaron Herrera), 'Filter Form Types' (CBME), 'Select Date of Encounter' (2021-01-11), and 'Select an EPA' (D2: Assessing, resuscitating, and providing initial management for patients with acute, unstable medical presentations) are highlighted with a red bracket and a green circle with the number '4'. The form also includes a search bar for 'Assessment Tools' and a list of available forms, such as 'General Internal Medicine: Transition to Discipline EPA #2 (Part B) Supervisor Form'.

- To add an external assessor, first try searching for their first name, last name, or email in the assessor search bar to ensure that an account has not already been created for them and to avoid duplicates. In the case that two options are listed for an assessor, **please use the one with UWO email** and notify elentra.support@schulich.uwo.ca to remove the duplicate. If the user you are looking for is not there, you can add them by clicking the External Assessor **(5)**.

Assessment Tools

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

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...

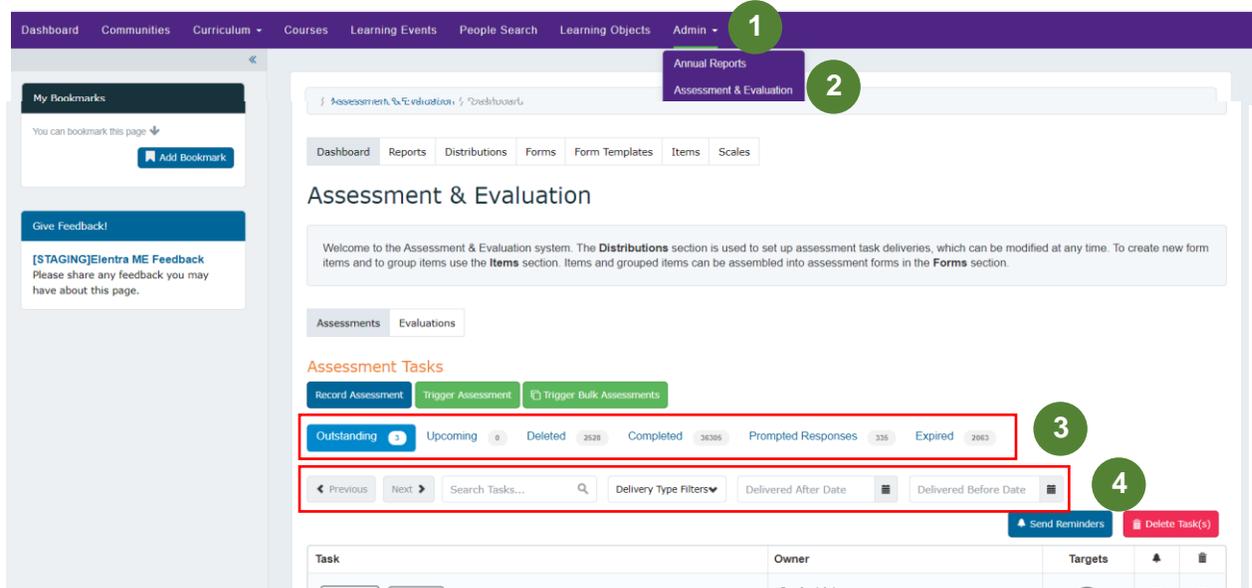
General Internal Medicine: Transition to Discipline EPA #2 (Part B) 04:14
Supervisor Form
0 assessments completed on this learner.

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](#)

[Delivery Type Filters](#)

4
[Send Reminders](#)
[Delete Task\(s\)](#)

Task	Owner	Targets		
Assessment 2020-12-09 Psychiatry: Foundations EPA #2	Sanford Adams	1	<input checked="" type="checkbox"/>	 3
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 ✕

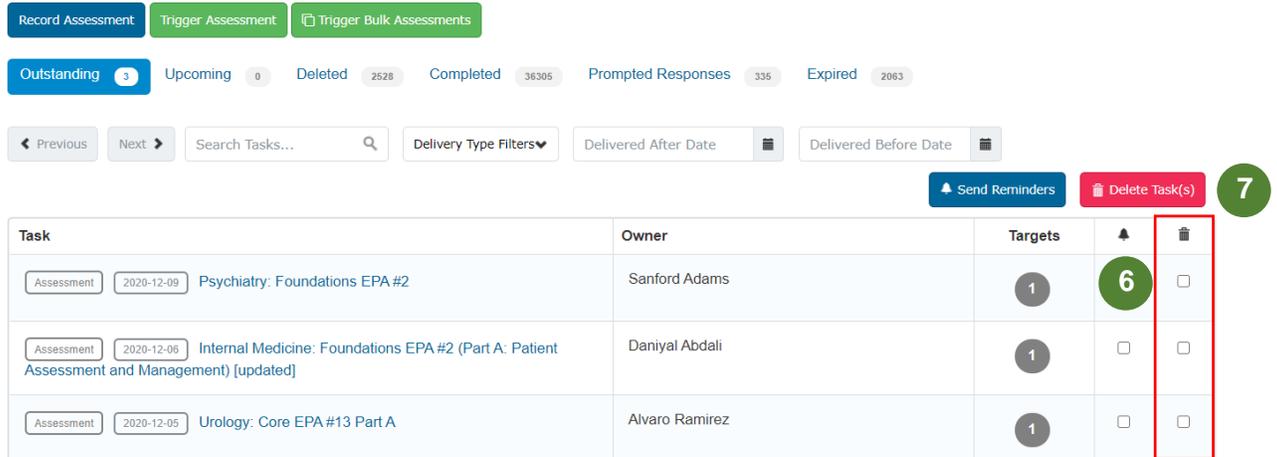
A reminder will be sent for the following assessor(s):

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).

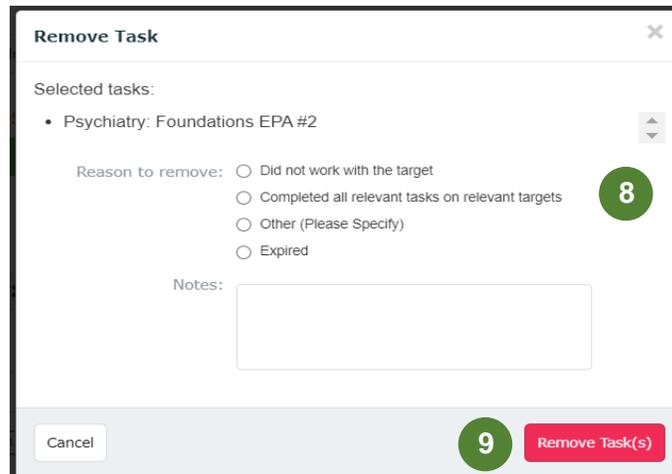
Assessment Tasks



The screenshot shows the 'Assessment Tasks' interface. At the top, there are buttons for 'Record Assessment', 'Trigger Assessment', and 'Trigger Bulk Assessments'. Below these are filters for 'Outstanding' (3), 'Upcoming' (0), 'Deleted' (2528), 'Completed' (36305), 'Prompted Responses' (335), and 'Expired' (2063). There are also navigation buttons for 'Previous' and 'Next', a search bar, and date filters for 'Delivered After Date' and 'Delivered Before Date'. On the right side, there are buttons for 'Send Reminders' and 'Delete Task(s)'. A table lists tasks with columns for 'Task', 'Owner', 'Targets', and a trash bin icon. The first row is highlighted, and the trash bin icon is circled in green with the number 6. The 'Delete Task(s)' button is circled in green with the number 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"/>

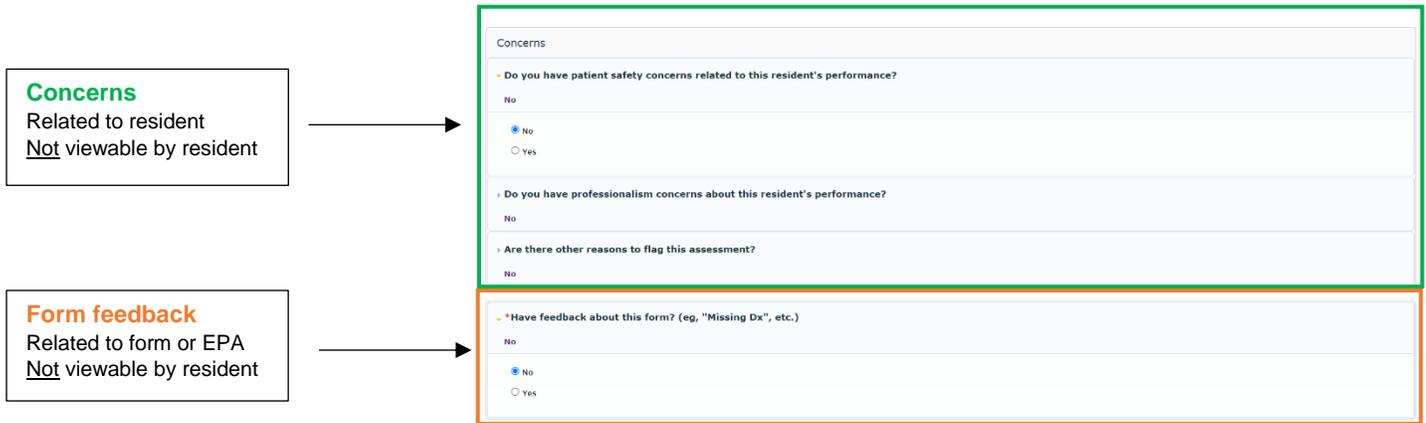
- You will then be asked to select a reason as to why the task is being deleted (8). Check off the corresponding box and provide a comment if specified as other. Click Remove Task(s) (9) to proceed.



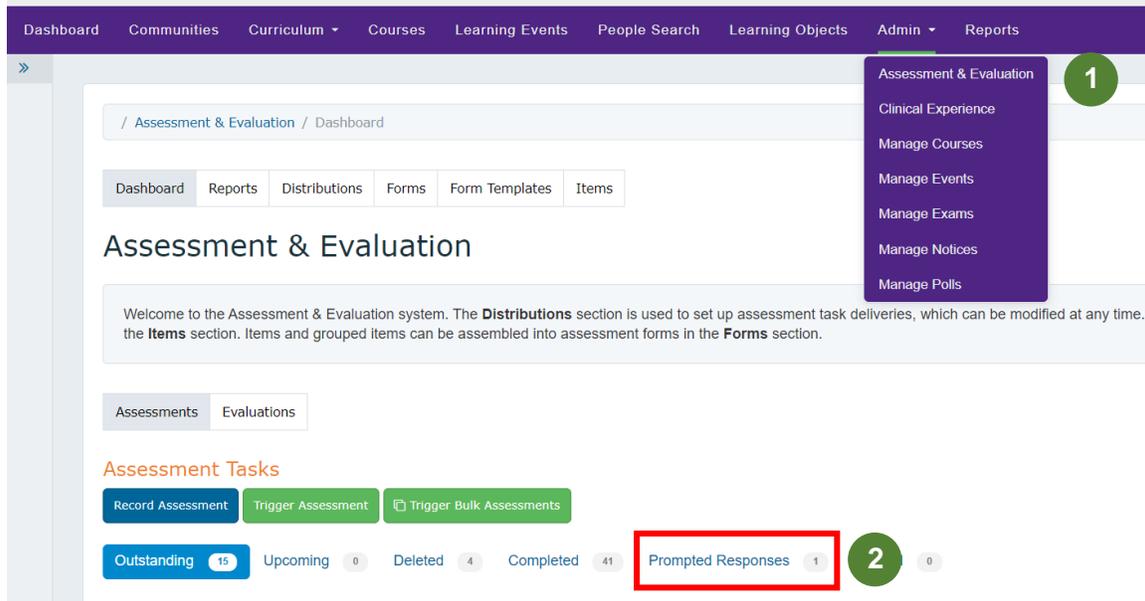
The screenshot shows the 'Remove Task' dialog box. It has a title bar with a close button. Below the title, it says 'Selected tasks:' followed by a list containing 'Psychiatry: Foundations EPA #2'. Underneath, there is a section 'Reason to remove:' with four radio button options: 'Did not work with the target', 'Completed all relevant tasks on relevant targets', 'Other (Please Specify)', and 'Expired'. The 'Completed all relevant tasks on relevant targets' option is selected and circled in green with the number 8. Below this is a 'Notes:' field with a text input area. At the bottom, there are two buttons: 'Cancel' and 'Remove Task(s)', with the latter circled in green with the number 9.

5.1.5 Concern Flags and Form Feedback

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



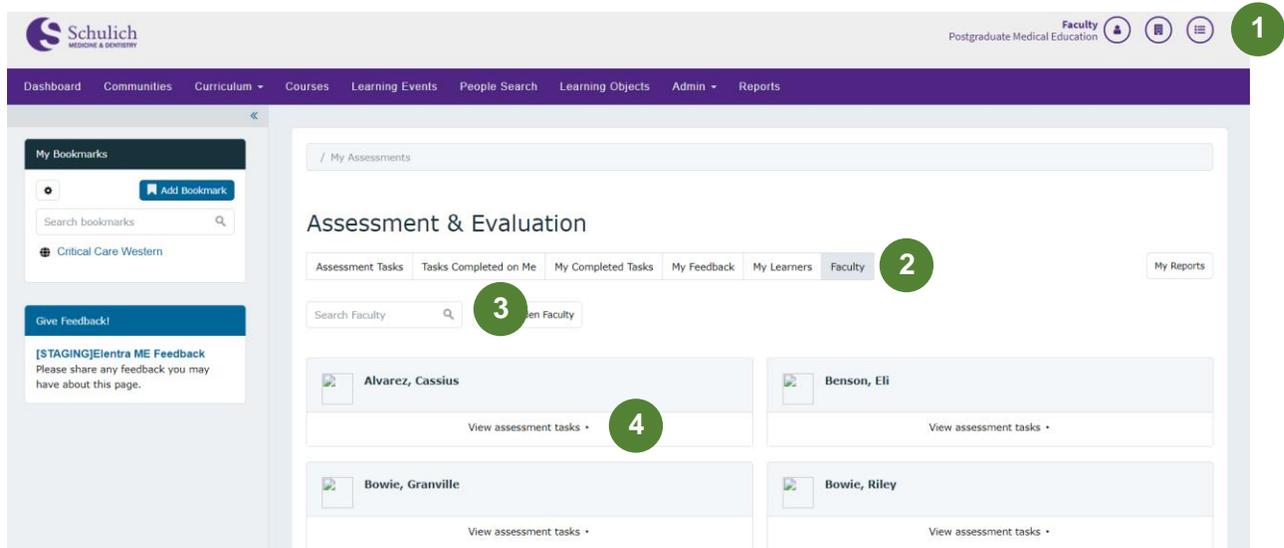
If a concern and/or form feedback is indicated, PDs and PAs will receive an email notification. PDs and PAs can also view any of these prompted responses by navigating to Admin → Assessment & Evaluation (1) within Elentra, then under the Prompted Responses (2) filter.



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' icon in the top right corner is highlighted with a green circle labeled '1'. The main content area is titled 'Assessment & Evaluation' and features several tabs: 'Assessment Tasks', 'Tasks Completed on Me', 'My Completed Tasks', 'My Feedback', 'My Learners', and 'Faculty' (highlighted with a green circle labeled '2'). A search bar labeled 'Search Faculty' is present, with a green circle labeled '3' over the search icon. Below the search bar, there are four faculty member cards: 'Alvarez, Cassius', 'Benson, Eii', 'Bowie, Granville', and 'Bowie, Riley'. Each card has a 'View assessment tasks' link, with a green circle labeled '4' over the link for Alvarez, Cassius.

- 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 Start

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.

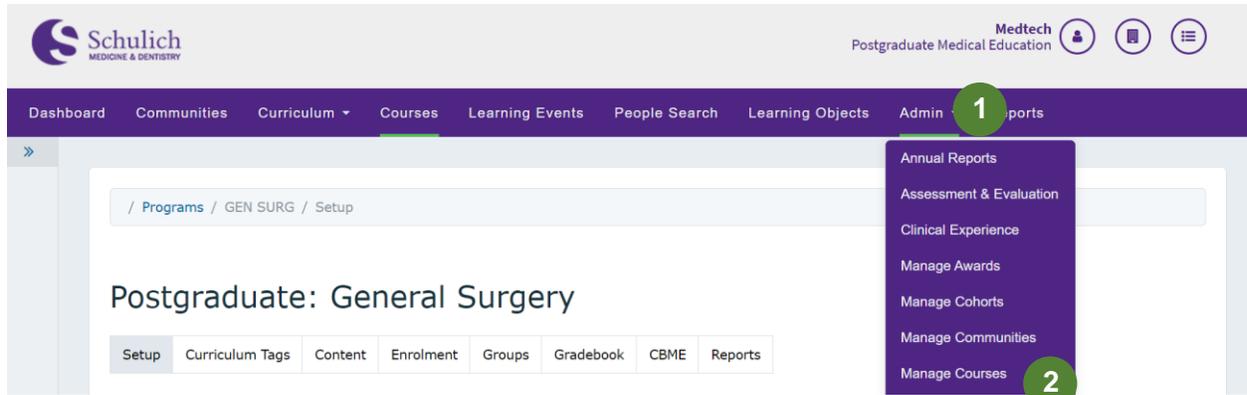
The topics discussed in this section include:

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

6.1 COURSE SETUP

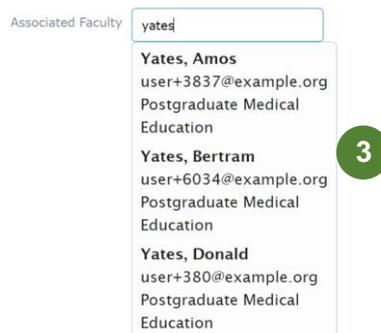
The course setup is where you can view and adjust the associated faculty of your program. Here is also where you can update members of your program's Competence Committee.

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

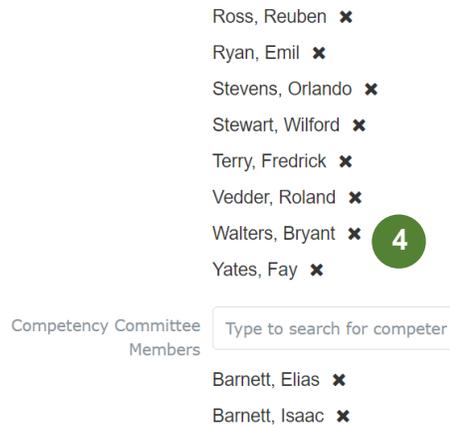


2. You will then be taken to the course setup page. Scroll down to Program Contacts to see a list of course members including the PD, PAs, Associated Faculty and Competence Committee members. It is important to keep this list up to date at all times to ensure members of your program have the access they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



A screenshot of a web interface showing a list of competency committee members. The list includes: Ross, Reuben ✕; Ryan, Emil ✕; Stevens, Orlando ✕; Stewart, Wilford ✕; Terry, Fredrick ✕; Vedder, Roland ✕; Walters, Bryant ✕ (with a green circle containing the number 4 next to it); and Yates, Fay ✕. Below the list is a search bar with the placeholder text "Type to search for competeer". Underneath the search bar, two more members are listed: Barnett, Elias ✕ and Barnett, Isaac ✕. The text "Competency Committee Members" is visible on the left side of the list.

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

Course Syllabus

Automatic Generation Enabled
 Disabled

Cancel

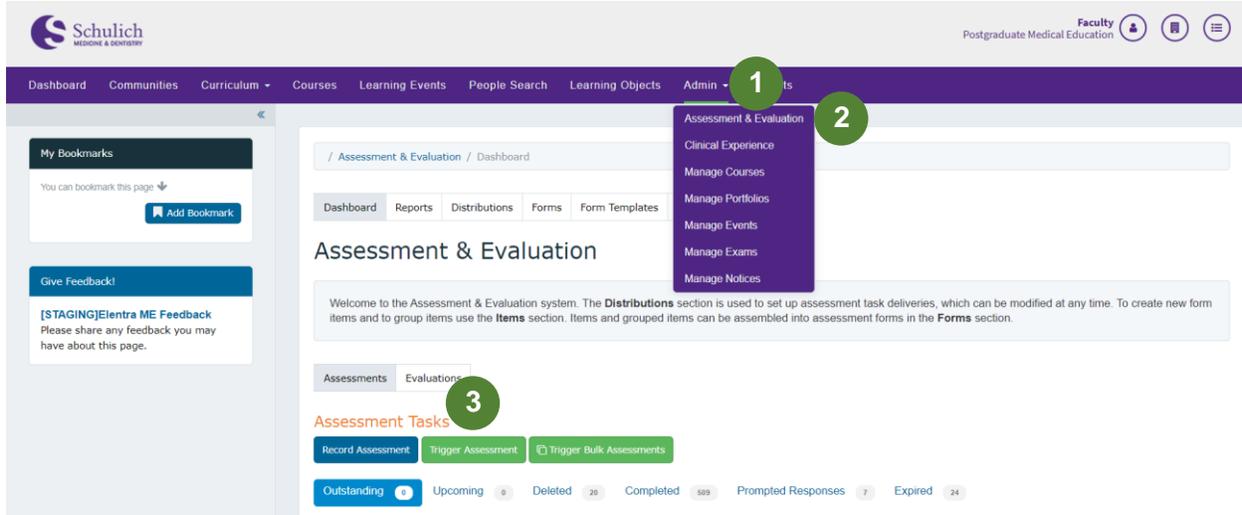
5 Save

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).



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

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...

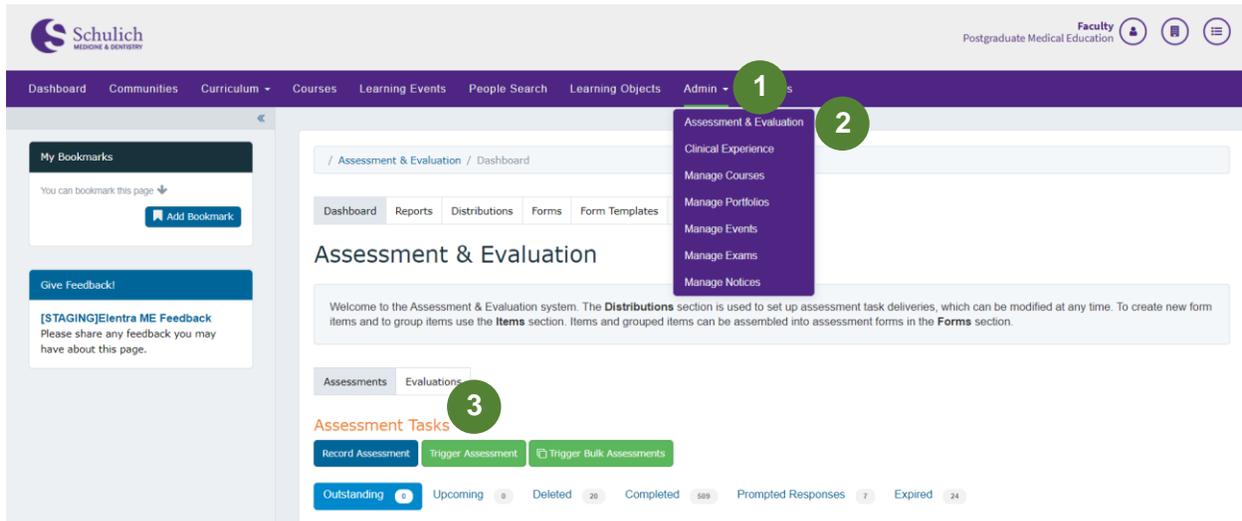
General Internal Medicine: Transition to Discipline EPA #2 (Part B)
Supervisor Form
0 assessments completed on this learner.

Preview This Form (5) Send Assessment (6)

6.2.2 Triggering Assessments to External Assessors

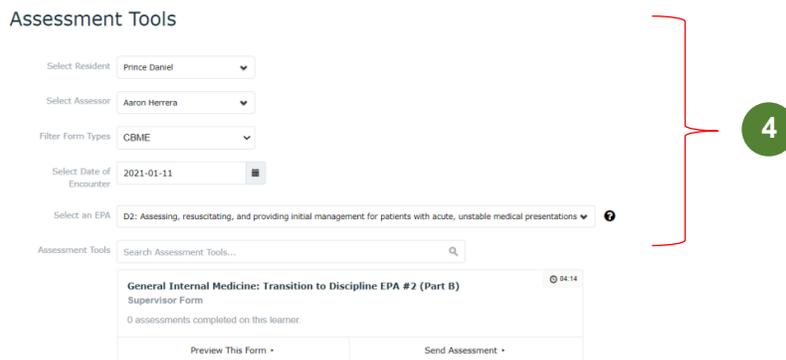
To trigger to an external assessor, the steps are similar to those in [6.2.1](#), however an extra step is required when selecting the assessor.

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, which is labeled with a green circle containing the number 4.

- To add an external assessor, first try searching for their first name, last name, or email in the assessor search bar to ensure that an account has not already been created for them and to avoid duplicates. In the case that two options are listed for an assessor, **please use the one with UWO email** and notify elentra.support@schulich.uwo.ca to remove the duplicate. If the user you are looking for is not there, you can add them by clicking the External Assessor **(5)**.

Assessment Tools

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

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...

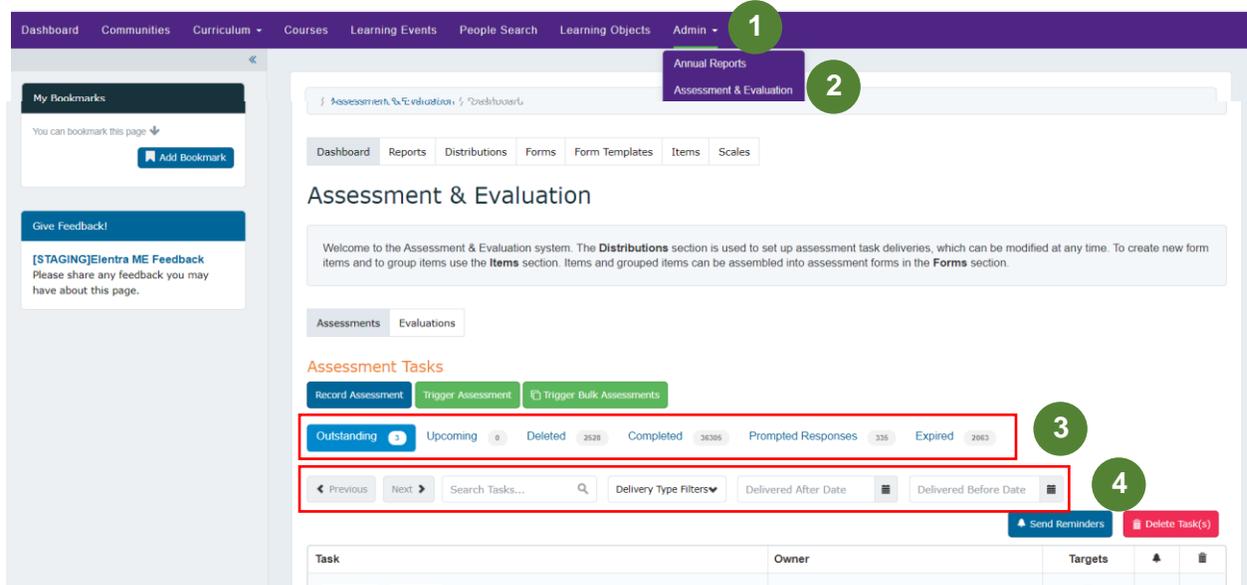
General Internal Medicine: Transition to Discipline EPA #2 (Part B) 04:14
 Supervisor Form
 0 assessments completed on this learner.

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](#)

[Delivery Type Filters](#)

4
[Send Reminders](#)
[Delete Task\(s\)](#)

Task	Owner	Targets		
Assessment 2020-12-09 Psychiatry: Foundations EPA #2	Sanford Adams	1	<input checked="" type="checkbox"/>	3
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:

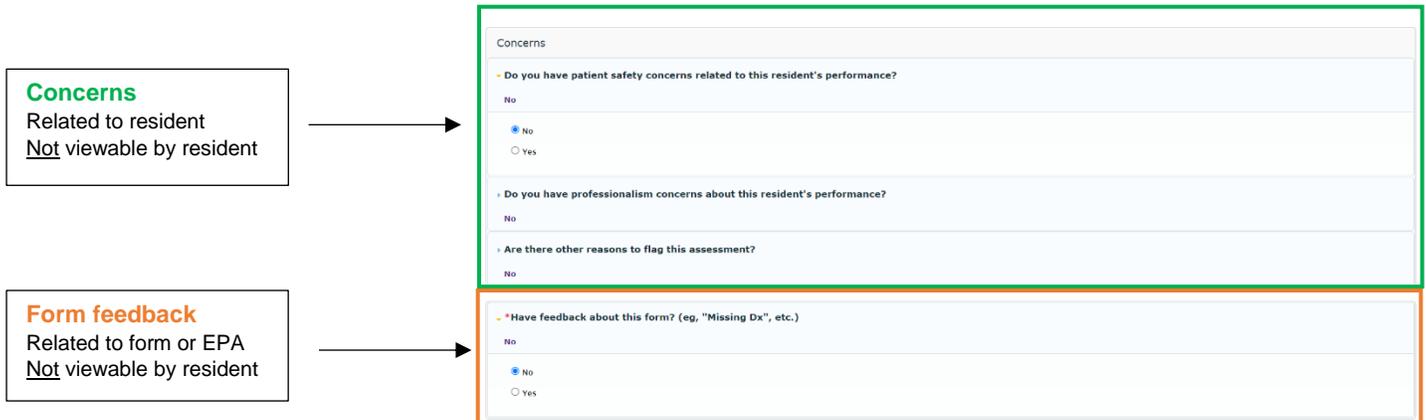
Did not work with the target
 Completed all relevant tasks on relevant targets 8
 Other (Please Specify)
 Expired

Notes:

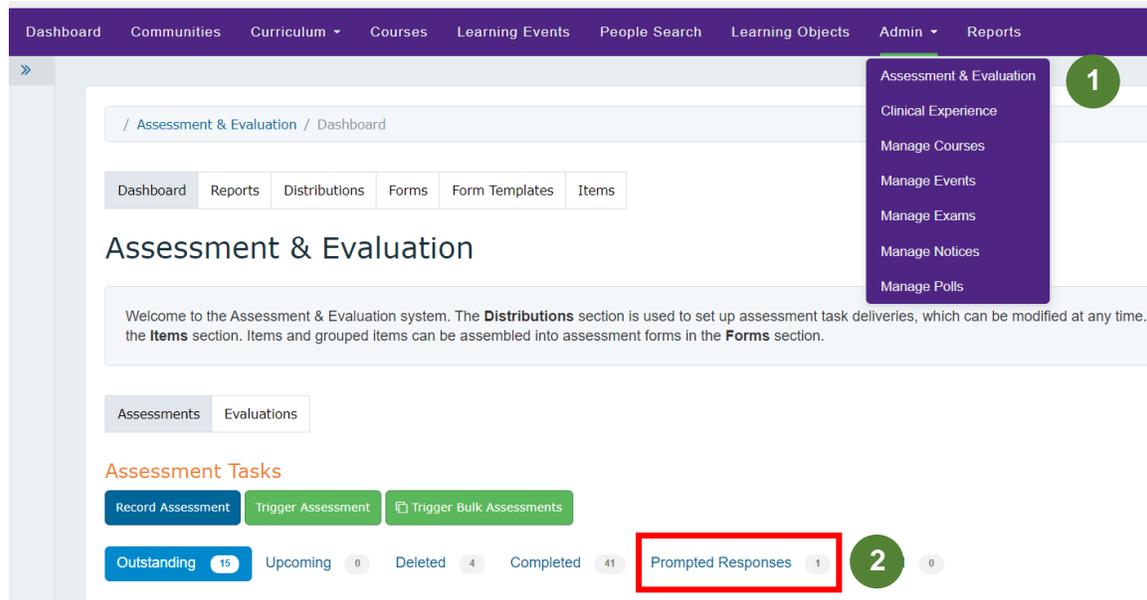
9

6.2.5 Concern Flags and Form Feedback

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



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



Dashboard Communities Curriculum Courses Learning Events People Search Learning Objects Admin Reports

/ Assessment & Evaluation / Dashboard

Dashboard Reports Distributions Forms Form Templates Items

Assessment & Evaluation

Welcome to the Assessment & Evaluation system. The **Distributions** section is used to set up assessment task deliveries, which can be modified at any time. the **Items** section. Items and grouped items can be assembled into assessment forms in the **Forms** section.

Assessments Evaluations

Assessment Tasks

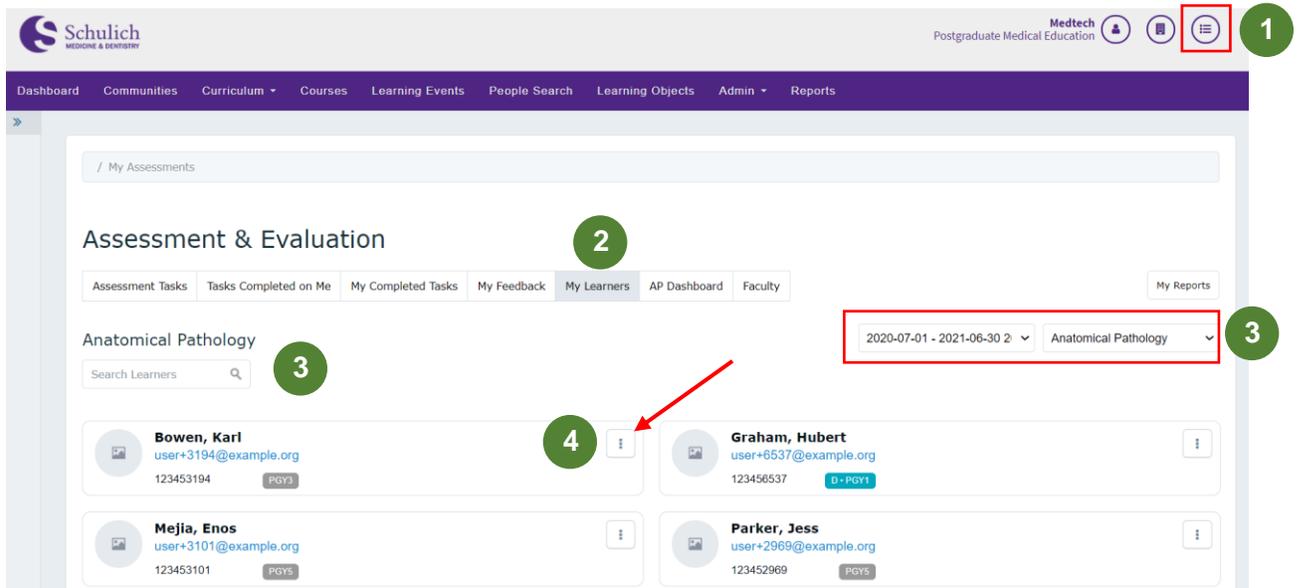
Record Assessment Trigger Assessment Trigger Bulk Assessments

Outstanding 15 Upcoming 0 Deleted 4 Completed 41 Prompted Responses 1

6.3 ACCESSING MY LEARNERS TAB

PAs are able to view their program’s residents’ Assessments and CBME Dashboard by the following steps:

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



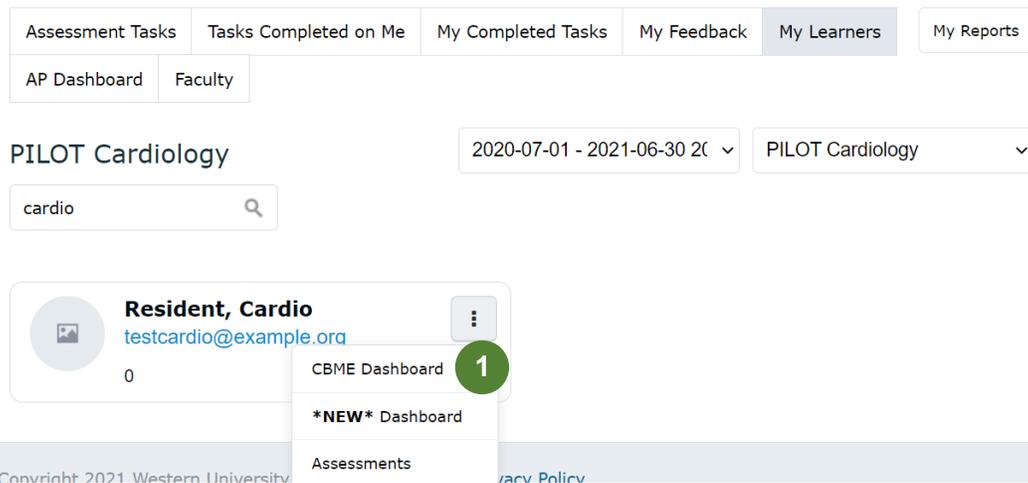
The screenshot displays the Schulich Medtech Postgraduate Medical Education interface. At the top right, the 'Assessment & Evaluation' icon is circled in red and labeled '1'. Below the navigation bar, the 'Assessment & Evaluation' section is highlighted with a green circle labeled '2'. Within this section, the 'My Learners' tab is selected. A search bar for learners is labeled '3'. A dropdown menu for curriculum periods and programs is also labeled '3'. Below the search bar, a list of learners is shown. Each learner entry includes a name, email, and ID. A red arrow points to the ellipsis icon next to 'Bowen, Karl', which is labeled '4'.

6.3.1 CBME Dashboard

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

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

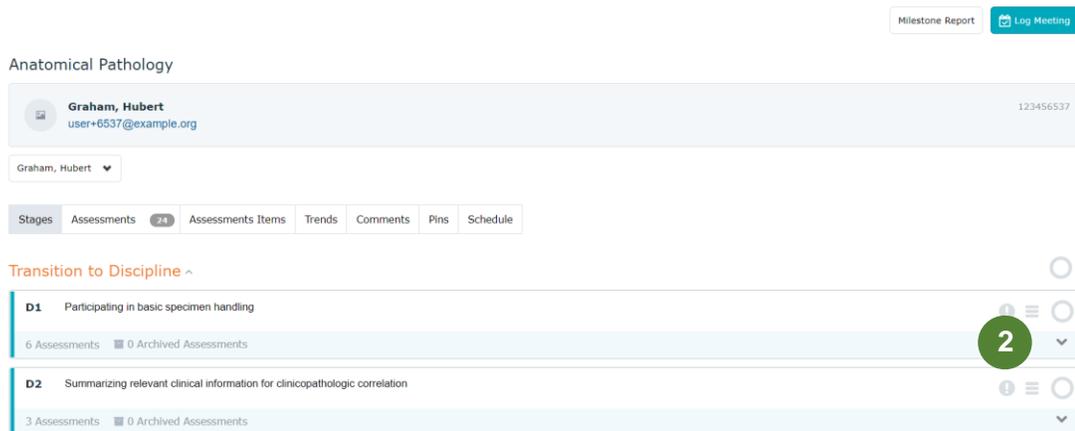
Assessment & Evaluation



The screenshot shows the 'Assessment & Evaluation' section of the Elentra system. The 'My Learners' tab is active. Below the navigation tabs, there are filters for 'AP Dashboard' and 'Faculty'. The search criteria are 'PILOT Cardiology' with a date range of '2020-07-01 - 2021-06-30 2021' and a dropdown menu set to 'PILOT Cardiology'. A search box contains the text 'cardio'. A learner card for 'Resident, Cardio' (testcardio@example.org) is displayed with a dropdown menu open, showing options: 'CBME Dashboard' (highlighted with a green circle and '1'), '*NEW* Dashboard', and 'Assessments'. A footer note reads 'Copyright 2021 Western University'.

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).

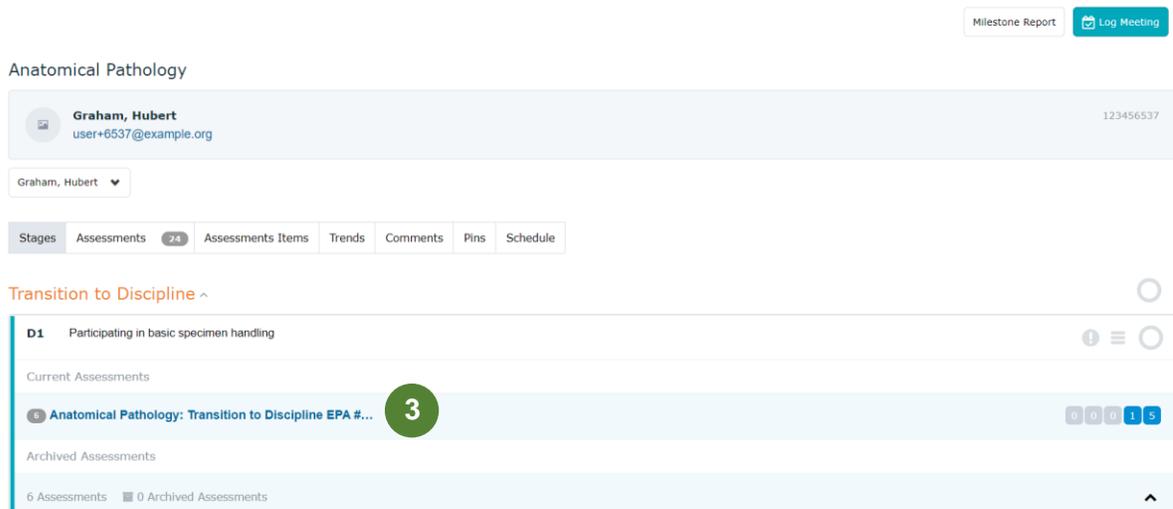
CBME Dashboard



The screenshot shows the 'CBME Dashboard' for a resident named Graham, Hubert (user+6537@example.org). The dashboard is for 'Anatomical Pathology'. It features a navigation bar with 'Stages', 'Assessments' (24), 'Assessments Items', 'Trends', 'Comments', 'Pins', and 'Schedule'. A 'Milestone Report' and 'Log Meeting' button are visible. Under the heading 'Transition to Discipline ^', two disciplines are listed: 'D1 Participating in basic specimen handling' (6 Assessments, 0 Archived Assessments) and 'D2 Summarizing relevant clinical information for clinicopathologic correlation' (3 Assessments, 0 Archived Assessments). The dropdown menu for D1 is open, showing a green circle with the number 2.

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

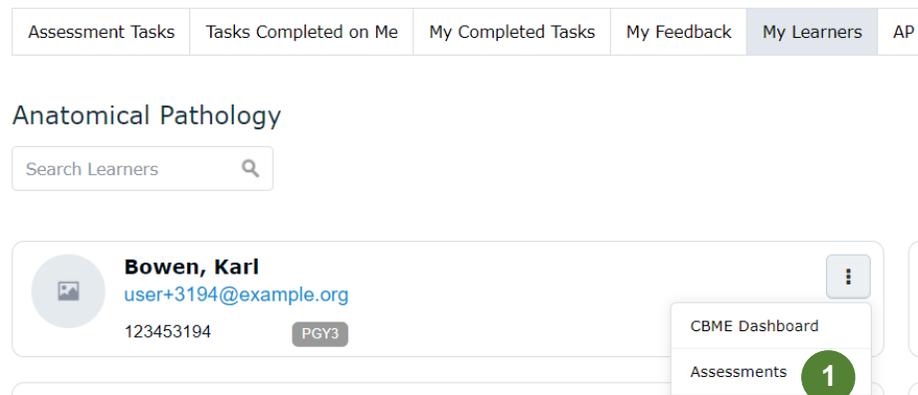
CBME Dashboard



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



- 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

Q
▼
▼
☰
☰
Apply Filters
Remove Filters

2
3

Tasks Completed on Hubert Graham

Reports for this Learner
Select All
Download PDF(s)

Anatomical Pathology: Foundations EPA #3

Supervisor Form

Optional
Visible to target
Delivered on Nov 16, 2020
Encountered on Nov 8, 2020
Expires on Dec 16, 2020
Completed on Nov 20, 2020

Target: **Hubert Graham**
Student • 2020

Assessor: **Giles Ball**
Student • 2019

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

View Task • 4

Anatomical Pathology: Foundations EPA #3

Supervisor Form

✓ Seen By Target on Nov 16, 2020

Optional
Visible to target
Delivered on Nov 2, 2020
Encountered on Nov 1, 2020
Expires on Dec 2, 2020
Completed on Nov 4, 2020

Target: **Hubert Graham**
Student • 2020

Assessor: **Marcus Sherman**
Faculty • Lecturer

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

View Task •

Anatomical Pathology: Foundations EPA #3

Supervisor Form

Optional
Visible to target
Delivered on Oct 19, 2020
Encountered on Oct 12, 2020
Completed on Oct 19, 2020

Target: **Hubert Graham**
Student • 2020

Assessor: **Warren Lewis**
Faculty • Lecturer

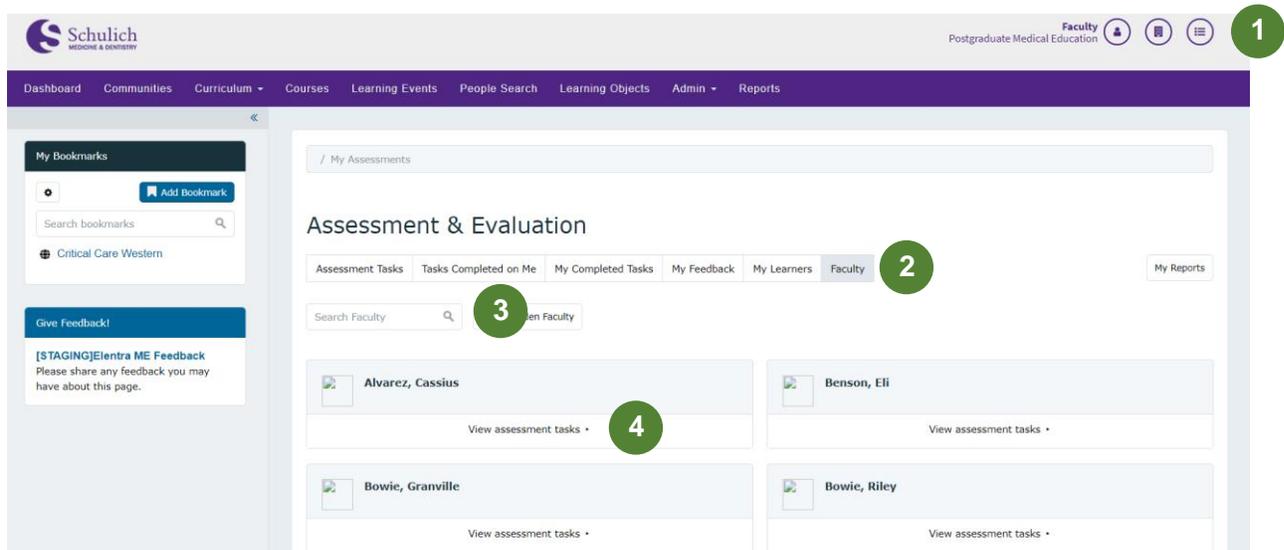
Select and click on the **Download PDF(s)** button above to download a PDF of all selected tasks.

View Task •

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. At the top right, there is a 'Faculty' icon (1) and a 'Postgraduate Medical Education' label. The main navigation bar includes 'Dashboard', 'Communities', 'Curriculum', 'Courses', 'Learning Events', 'People Search', 'Learning Objects', 'Admin', and 'Reports'. On the left sidebar, there are sections for 'My Bookmarks' and 'Give Feedback!'. 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). Below the tabs is a search bar labeled 'Search Faculty' (3) with a 'Find Faculty' button. The search results are displayed in a grid of four faculty member cards: Alvarez, Cassius; Benson, Eli; Bowie, Granville; and Bowie, Riley. Each card 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

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

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

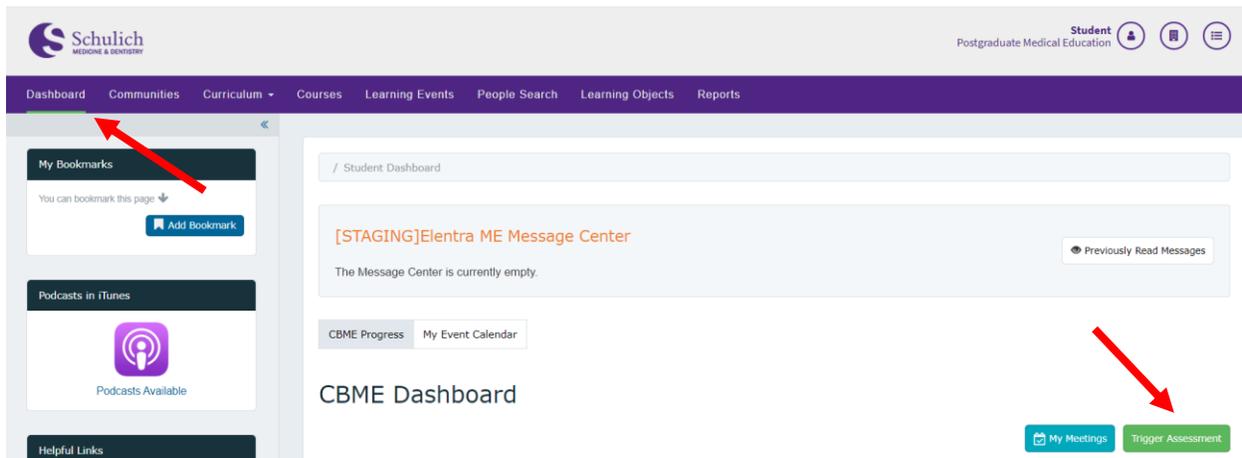
7.4 Narratives

7.1 EPAS AS A TARGET

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

7.1.1 Triggering EPAs

Residents can trigger an EPA assessment from the Elentra Dashboard, which is the first screen shown after logging in. You can always return to your CBME Dashboard by clicking Dashboard in the top left of your Elentra screen.



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

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 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/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

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.

Preview This Form 9	Begin Assessment 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)

Surgical Foundations: Transition to Discipline EPA#1

1 [Download PDF](#) [Forward Task](#) [Delete Task](#)

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

Assessor  Fredrick Keller Faculty • Postgraduate Medical Education user+7028@example.org	>	Target  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

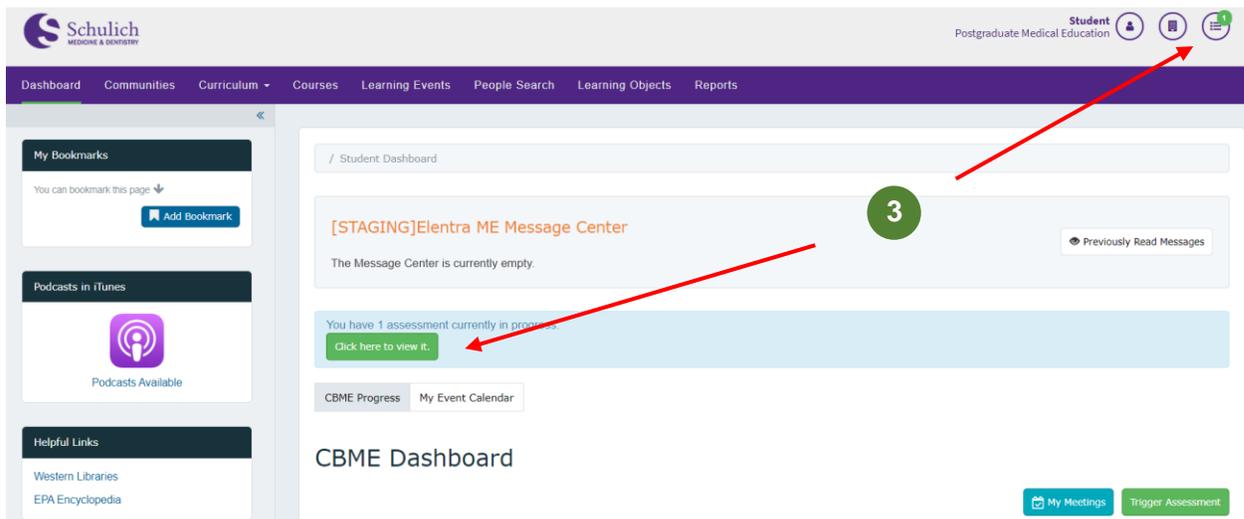
Have feedback about this form? (eg, "Missing Dx", etc.)
No

No
 Yes

2

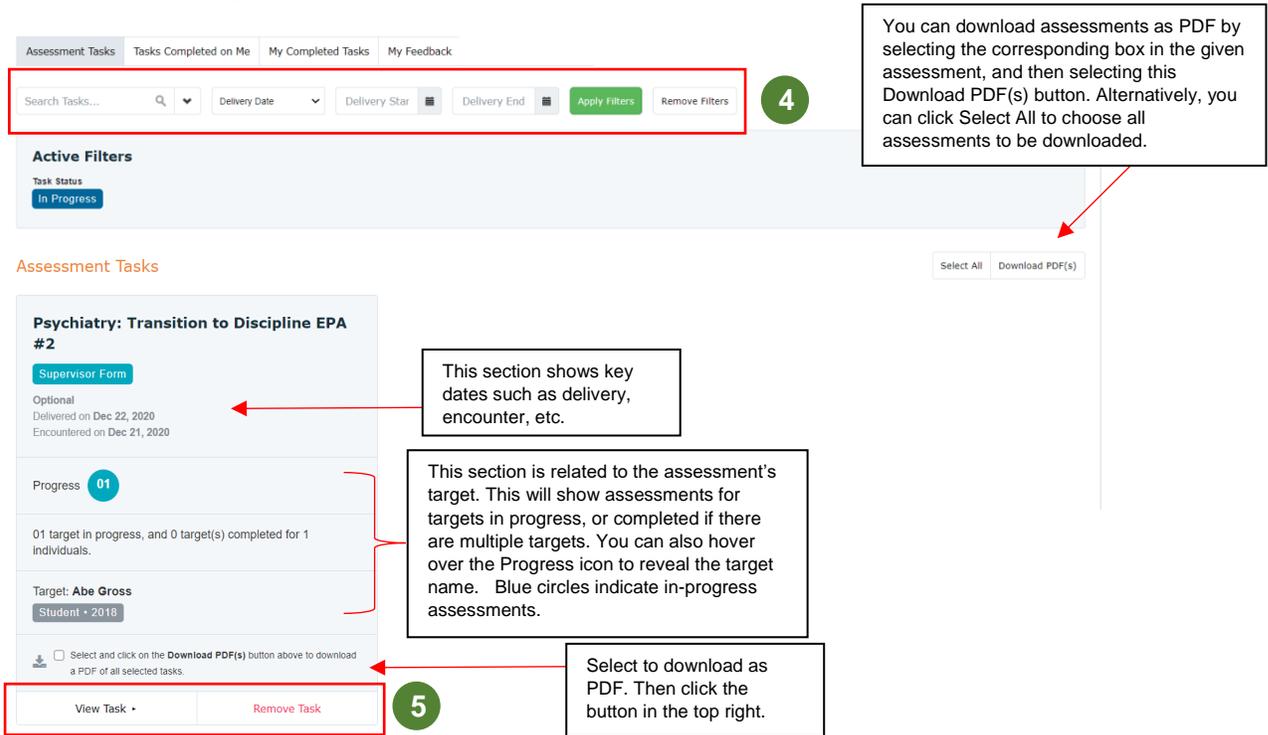
Save as Draft
or
Submit and notify assessor by email

- 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 Postgraduate Medical Education dashboard. At the top right, there are navigation icons for a user profile, a notification bell, and a message center. A red arrow points from the notification bell icon to a green circle with the number '3' on the dashboard. Below this, a notification banner states: "You have 1 assessment currently in progress." A green button labeled "Click here to view it." is highlighted with a red arrow. Another red arrow points from the top right notification bell icon to the same green circle '3'.

4. Clicking on either of these options will take you to the following screen. Here you will see a list of your outstanding assessments. If you have multiple assessments, you can also use the search functions to narrow down your results (4). On each task you also have the option to View Task or Remove Task (5). Clicking View Task will allow you to continue filling out the form.



The screenshot shows the 'Assessment Tasks' page. 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 green circle with the number '4' points to this search and filter area. A callout box explains that assessments can be downloaded as PDF by selecting the corresponding box in the given assessment and then selecting the 'Download PDF(s)' button. Alternatively, the 'Select All' button can be used to choose all assessments to be downloaded.

Below the search bar is the 'Active Filters' section, which shows 'Task Status' with an 'In Progress' button. Underneath is the 'Assessment Tasks' section. The first task is 'Psychiatry: Transition to Discipline EPA #2'. It has a 'Supervisor Form' button and 'Optional' status with delivery and encounter dates. A 'Progress' section shows '01' in a blue circle, indicating one target in progress. Below this, it says '01 target in progress, and 0 target(s) completed for 1 individuals.' The target is 'Abe Gross' (Student • 2018). At the bottom of the task card, there is a checkbox to 'Select and click on the Download PDF(s) button above to download a PDF of all selected tasks.' A green circle with the number '5' points to the 'View Task' and 'Remove Task' buttons at the bottom of the task card. A callout box explains that this section shows key dates such as delivery, encounter, etc. Another callout box explains that the progress section is related to the assessment's target, showing assessments for targets in progress or completed, and that blue circles indicate in-progress assessments. A final callout box explains that the checkbox is used to select to download as PDF, and then the 'Download PDF(s)' button in the top right should be clicked.

7.1.3 EPA Expiries and Reminder Emails

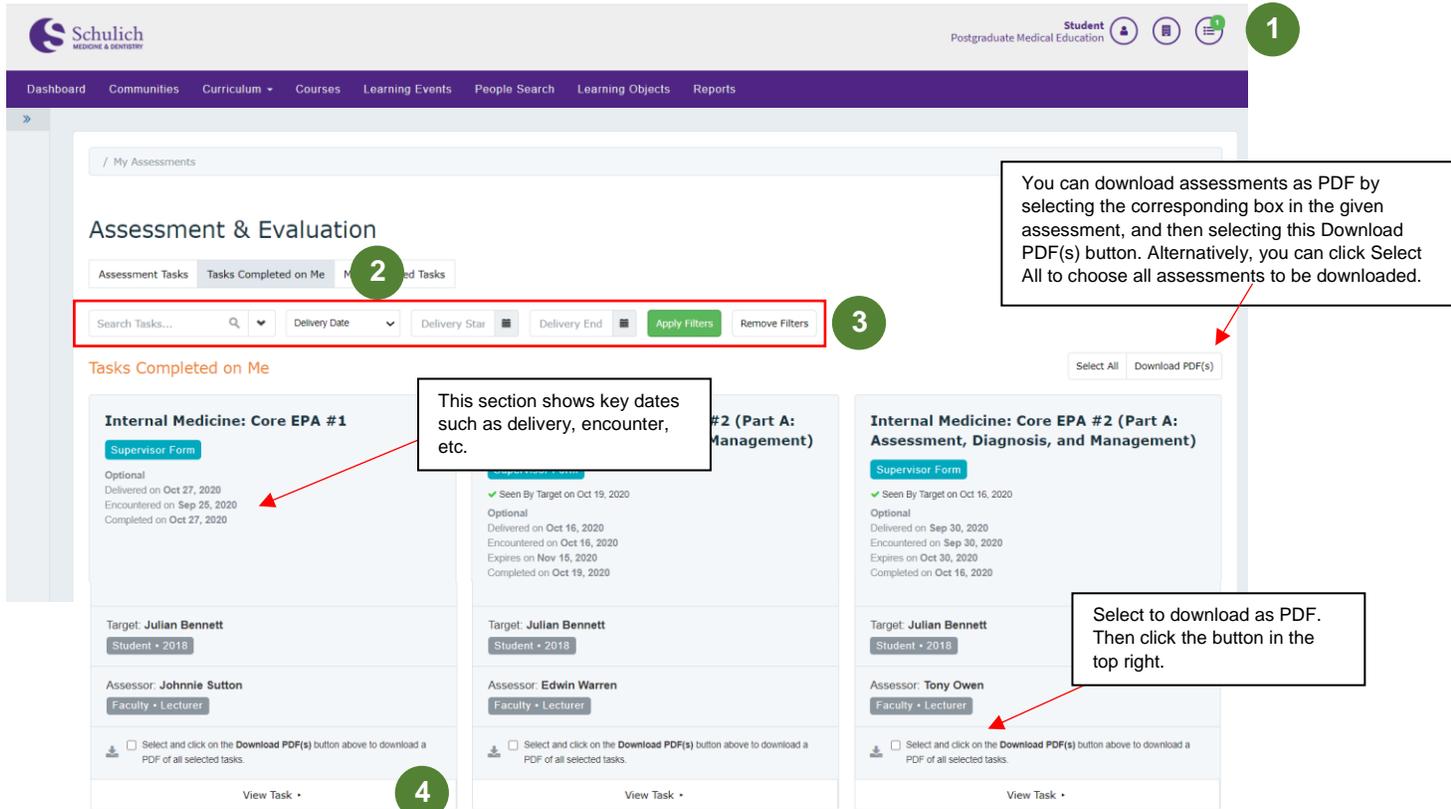
Incomplete EPA assessments will automatically expire 30 days after the initial trigger date. This timeframe will be revisited often to determine an optimal balance between the quality and prioritization of EPA completion with adapting to our new CBME culture.

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).

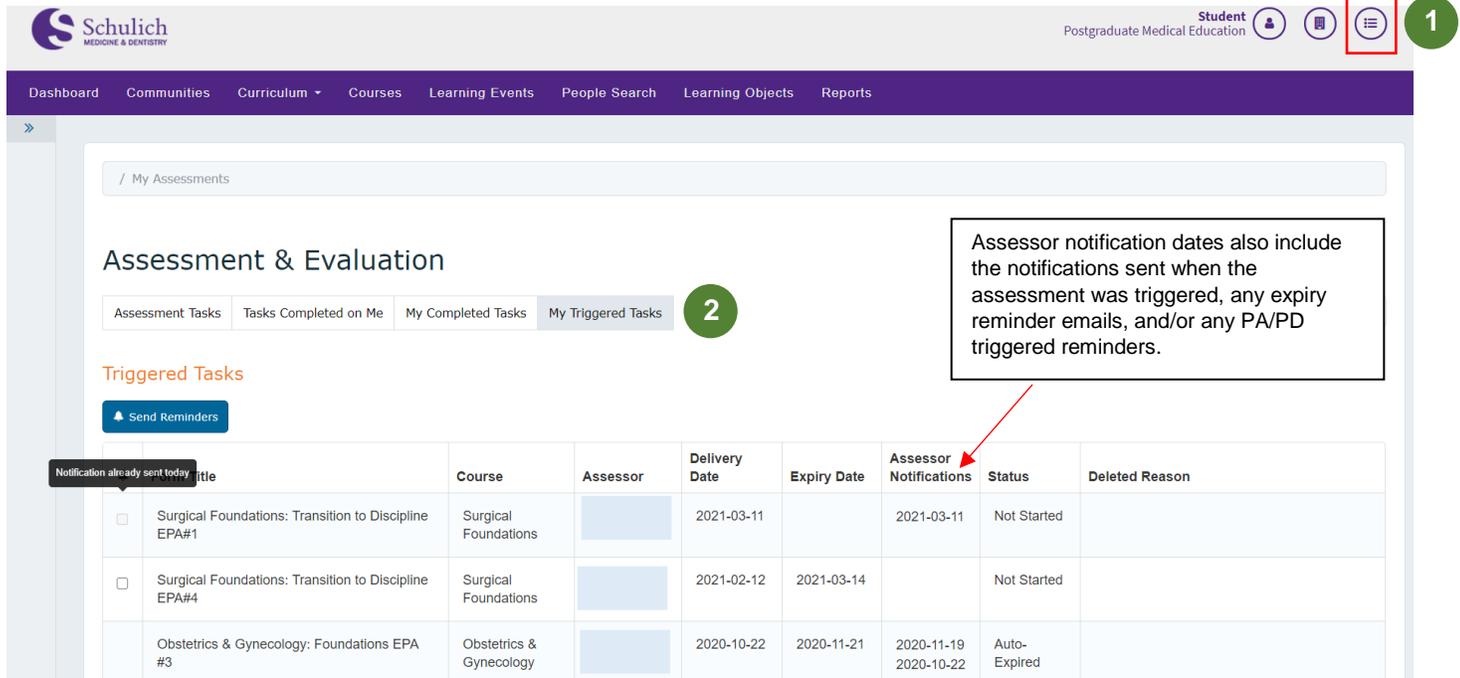


The screenshot displays the 'Assessment & Evaluation' section of the Schulich system. The top navigation bar includes 'Student Postgraduate Medical Education' and a notification icon (1). The main content area is titled 'Assessment & Evaluation' and has tabs for 'Assessment Tasks', 'Tasks Completed on 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 this, the 'Tasks Completed on Me' section lists three tasks. Each task card includes a 'Supervisor Form' button, a status indicator (e.g., 'Seen By Target'), and key dates (Delivered, Encountered, Expires, Completed). The first task is 'Internal Medicine: Core EPA #1' with target Julian Bennett and assessor Johnnie Sutton. The second is 'Internal Medicine: Core EPA #2 (Part A: Management)' with target Julian Bennett and assessor Edwin Warren. The third is 'Internal Medicine: Core EPA #2 (Part A: Assessment, Diagnosis, and Management)' with target Julian Bennett and assessor Tony Owen. Each task card has a 'View Task' button (4) and a checkbox to 'Download PDF(s)'. A callout box explains that clicking the checkbox and then the 'Download PDF(s)' button will download the assessment as a PDF. Another callout box points to the 'Download PDF(s)' button, stating to select it and click the button in the top right.

7.1.5 Viewing My Triggered Tasks and Sending Reminders

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

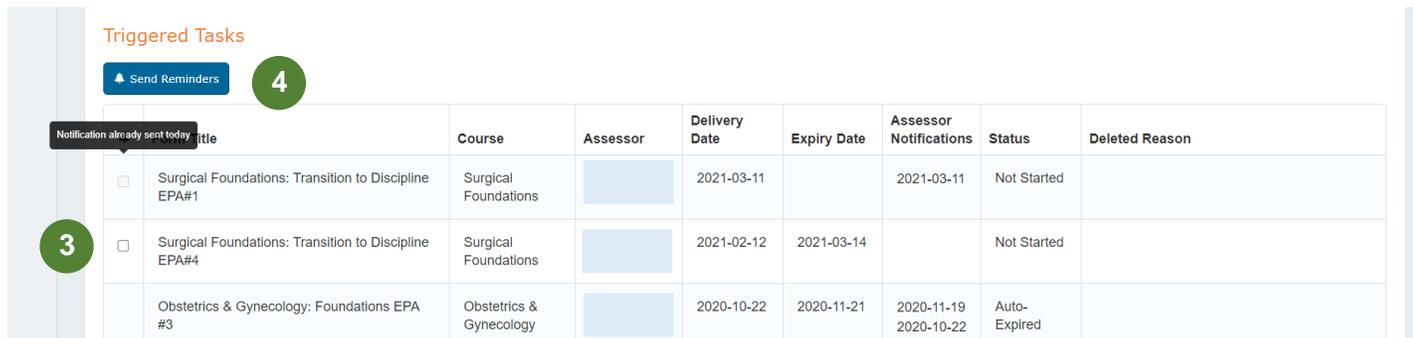
1. Click on the Assessment & Evaluation (1) icon in the top right corner, then My Triggered Tasks (2). You will then see a list of tasks you have triggered and their status (e.g., not started, auto-expired, deleted, etc.) along with the dates of any previous notifications sent.



Assessor notification dates also include the notifications sent when the assessment was triggered, any expiry reminder emails, and/or any PA/PD triggered 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.



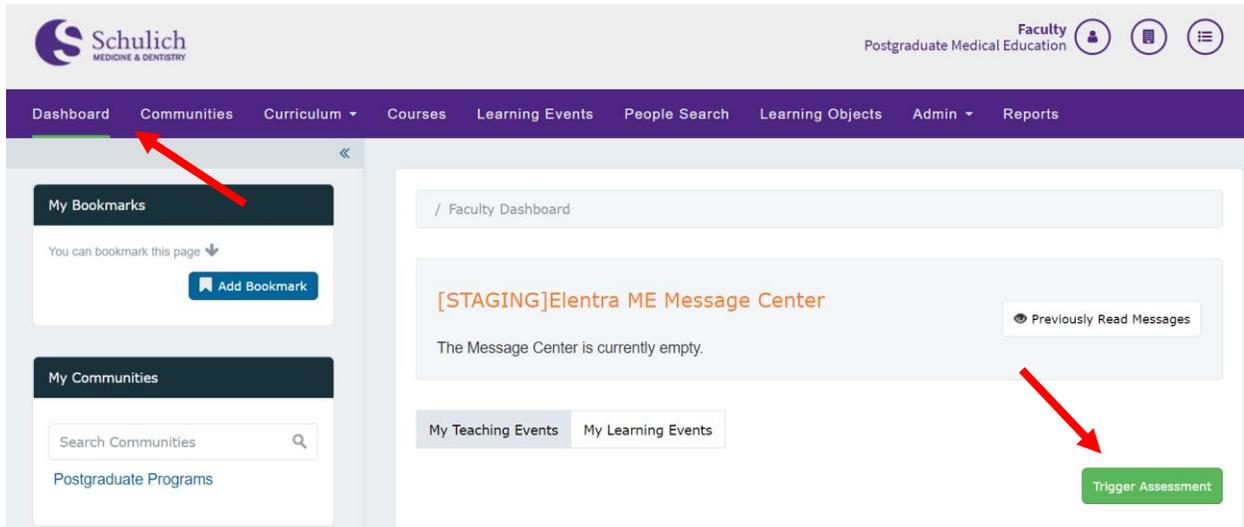
Send Reminders (4)

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

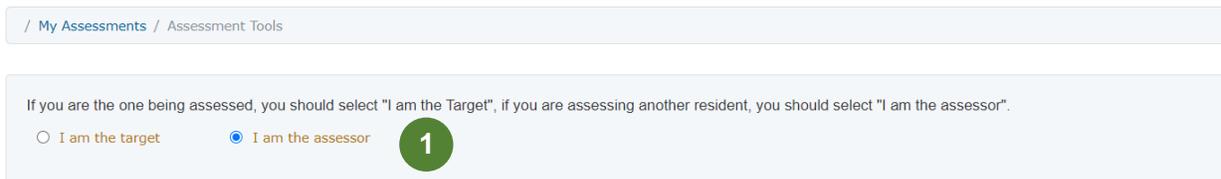
7.2.1 Triggering and Completing EPAs

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. On the left sidebar, there are sections for 'My Bookmarks' and 'My Communities'. The main content area shows a message center with the text '[STAGING]Elentra ME Message Center' and 'The Message Center is currently empty.' A 'Trigger Assessment' button is located at the bottom right of the message center, highlighted with a red arrow.

1. Select I am the assessor (1).



The screenshot shows the 'Assessment Tools' page. The breadcrumb trail is '/ My Assessments / Assessment Tools'. Below the breadcrumb, there is a text box that reads: '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".' There are two radio buttons: 'I am the target' and 'I am the assessor'. The 'I am the assessor' radio button is selected and highlighted with a green circle containing the number 1.

Assessment Tools

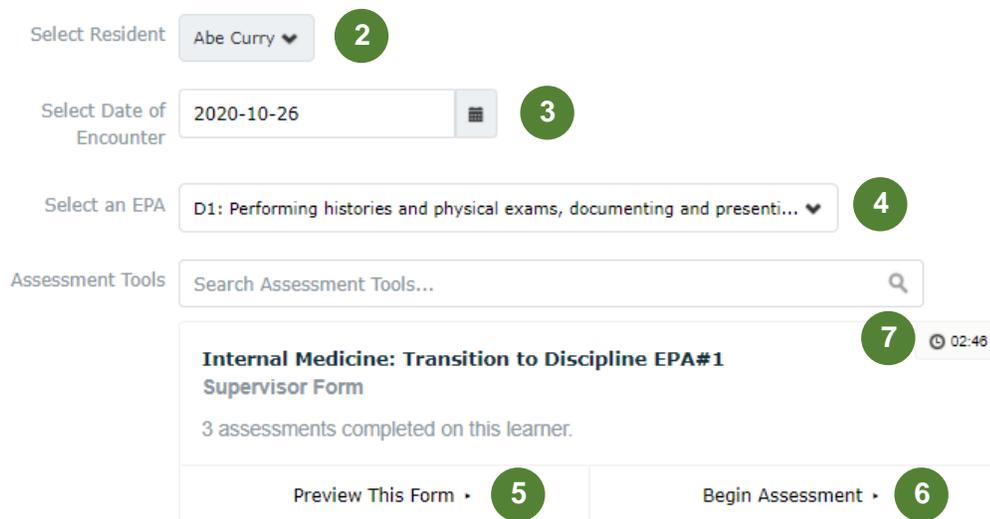
Select Resident

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.

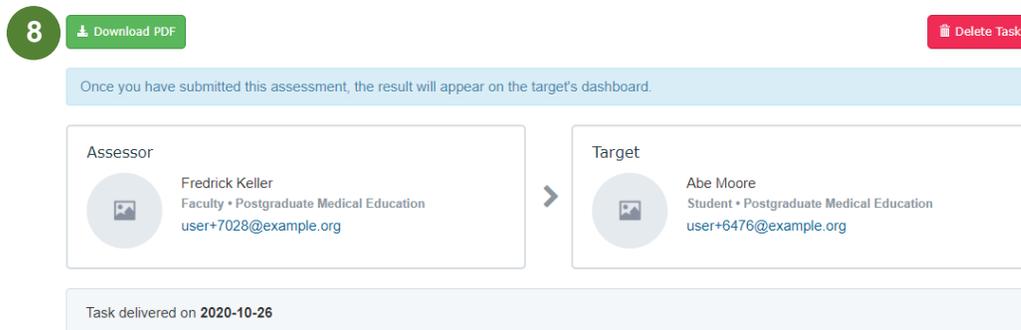
Assessment Tools



The screenshot shows the 'Assessment Tools' interface. At the top, there is a 'Select Resident' dropdown menu with 'Abe Curry' selected, marked with a green circle '2'. Below it is a 'Select Date of Encounter' date picker with '2020-10-26' selected, marked with a green circle '3'. The next field is 'Select an EPA' with a dropdown menu showing 'D1: Performing histories and physical exams, documenting and presenti...', marked with a green circle '4'. Below these is a search bar for 'Assessment Tools' with the text 'Search Assessment Tools...' and a magnifying glass icon. A search result is displayed in a card, marked with a green circle '7'. The card title is 'Internal Medicine: Transition to Discipline EPA#1 Supervisor Form' and it shows '3 assessments completed on this learner.' At the bottom of the card are two buttons: 'Preview This Form' marked with a green circle '5' and 'Begin Assessment' marked with a green circle '6'. A clock icon in the top right corner of the card shows '02:46'.

- 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



The screenshot shows the assessment form for 'Surgical Foundations: Transition to Discipline EPA#1'. At the top left, there is a green button with a download icon and the text 'Download PDF', marked with a green circle '8'. At the top right, there is a red button with a trash icon and the text 'Delete Task'. Below these is a light blue informational box that says 'Once you have submitted this assessment, the result will appear on the target's dashboard.' The main content area is divided into two columns: 'Assessor' and 'Target'. The 'Assessor' column shows a profile for 'Fredrick Keller', Faculty • Postgraduate Medical Education, with email 'user+7028@example.org'. The 'Target' column shows a profile for 'Abe Moore', Student • Postgraduate Medical Education, with email 'user+6476@example.org'. Below these columns is a light blue box that says '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 --

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

No
 Yes

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

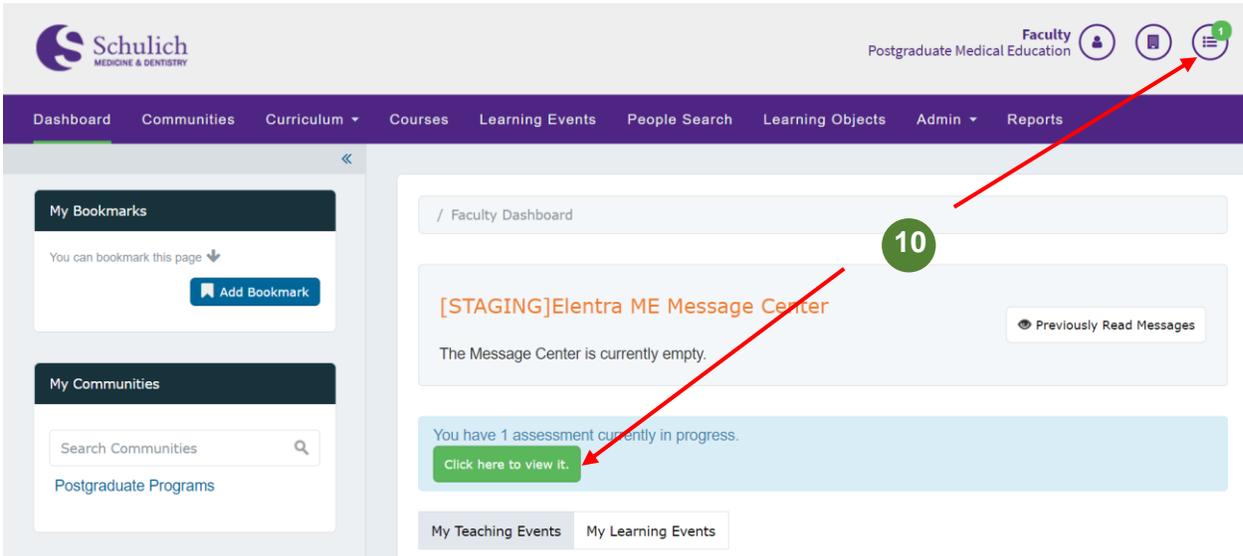
Are there other reasons to flag this assessment?
No

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

No
 Yes

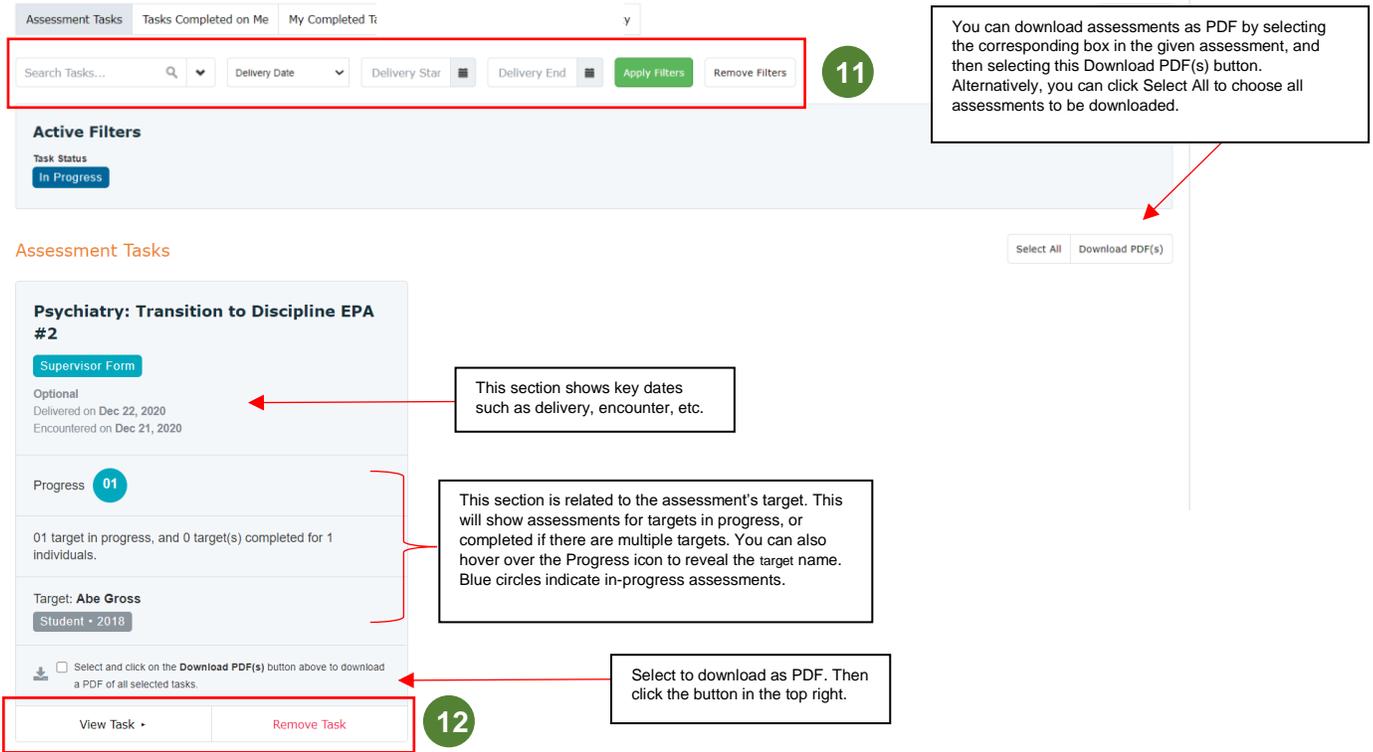
9 Save as Draft or Submit

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', a message center titled '[STAGING]Elentra ME Message Center' (which is currently empty), and a blue notification box stating '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 box. A red arrow points from the notification box to the notification icon in the top right corner.

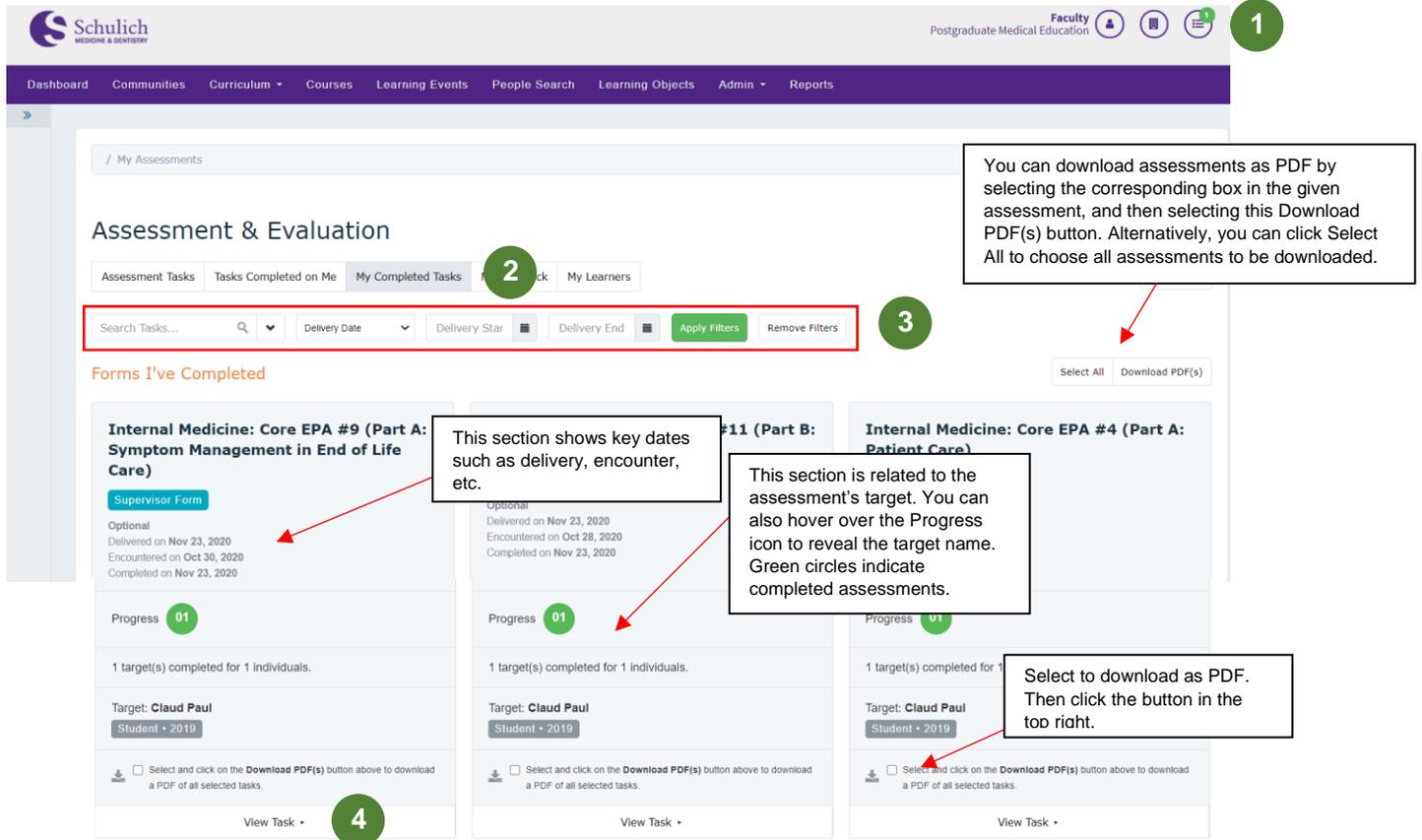
6. Clicking on either of these options will take you to the following screen. Here you will see a list of your outstanding assessments. If you have multiple assessments, you can also use the search functions to narrow down your results (11). On each task you also have the option to View Task or Remove 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 red box highlights the search and filter area, with callout 11 pointing to it. Callout 11 text: "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 description of targets, and a 'Target' section for 'Abe Gross Student • 2018'. A red box highlights the 'View Task' and 'Remove Task' buttons at the bottom of the card, with callout 12 pointing to it. Callout 12 text: "Select to download as PDF. Then click the button in the top right." Another callout points to the 'Download PDF(s)' button in the top right of the card area.

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' 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 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. Three text boxes provide additional instructions: one explains how to download assessments as PDFs, another describes the key dates section, and a third explains the progress icon and target name.

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.

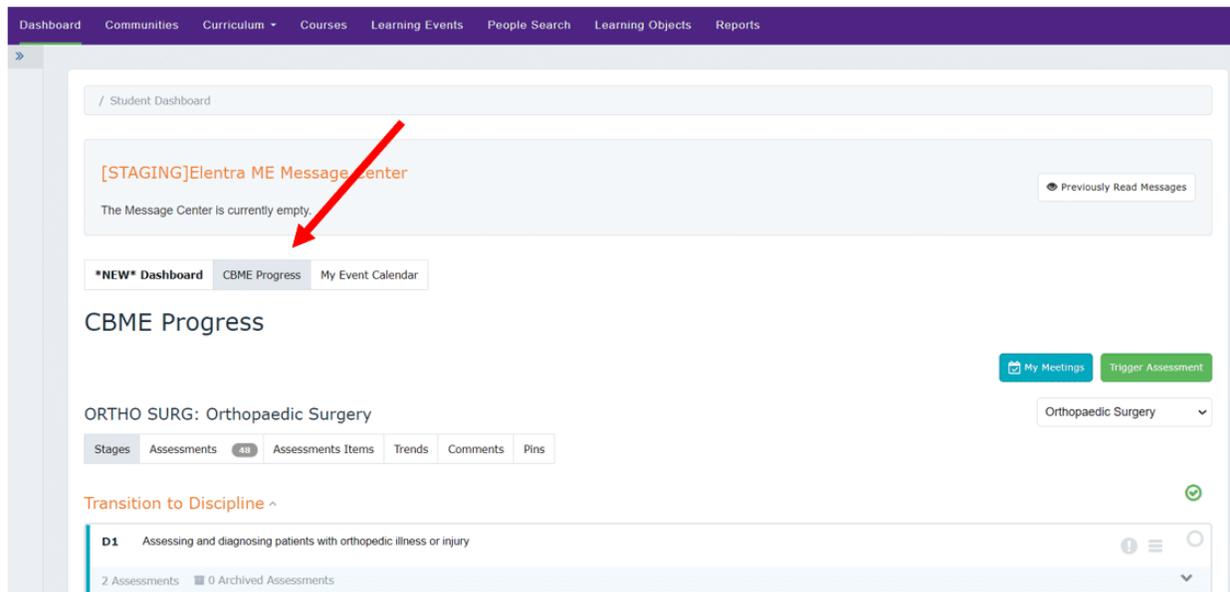
3 This section is related to the assessment's target. You can also hover over the Progress icon to reveal the target name. Green circles indicate completed assessments.

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

7.3 MANAGING CBME PROGRESS

Residents are able to view their progress at any time by viewing their CBME Progress. The Dashboard can be accessed from any page within Elentra, simply by clicking on the Dashboard tab in the main ribbon, and then the CBME Progress tab.

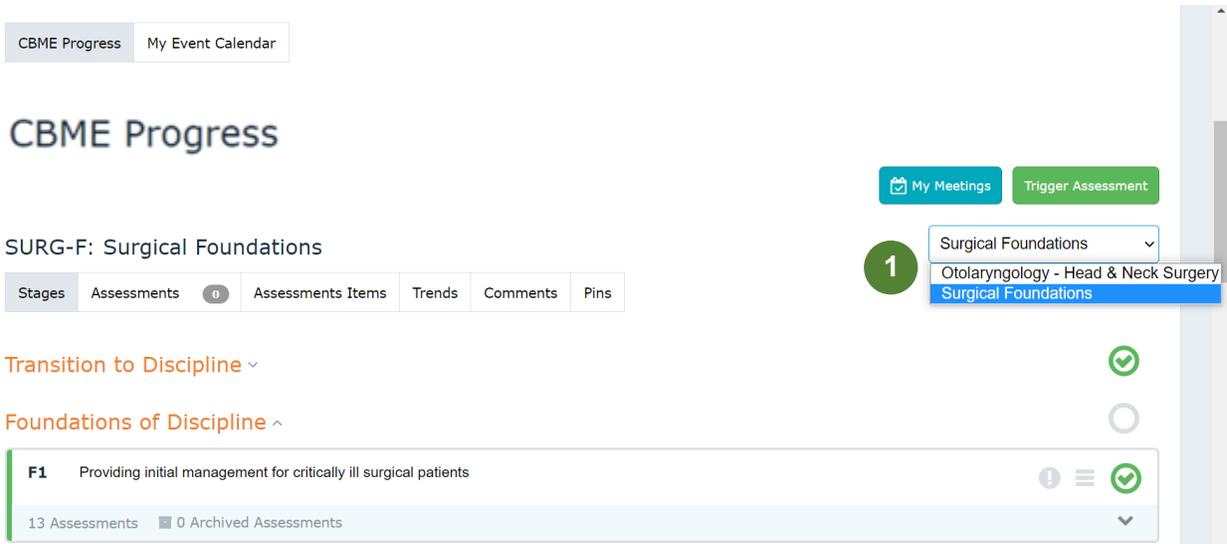
NOTE – a NEW Resident Dashboard is now available as of August 2021, information on this can be found in section [7.5 NEW Resident Dashboard](#).



The screenshot shows the Elentra Student Dashboard interface. At the top, there is a navigation ribbon with tabs: Dashboard, Communities, Curriculum, Courses, Learning Events, People Search, Learning Objects, and Reports. Below the ribbon, the page title is "/ Student Dashboard". A message center section displays "[STAGING]Elentra ME Message Center" and "The Message Center is currently empty." with a "Previously Read Messages" button. A red arrow points to the "CBME Progress" tab in a sub-navigation bar, which also includes "*NEW* Dashboard" and "My Event Calendar". The main content area is titled "CBME Progress" and features a "My Meetings" button, a "Trigger Assessment" button, and a dropdown menu set to "Orthopaedic Surgery". Below this, there are tabs for "Stages", "Assessments" (with a count of 48), "Assessments Items", "Trends", "Comments", and "Pins". A "Transition to Discipline" link is visible. The current discipline is "D1 Assessing and diagnosing patients with orthopedic illness or injury", showing "2 Assessments" and "0 Archived Assessments".

7.3.1 Multiple Programs

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



The screenshot shows the 'CBME Progress' interface. At the top, there are two tabs: 'CBME Progress' (selected) and 'My Event Calendar'. Below the tabs is the heading 'CBME Progress'. On the right side, there are two buttons: 'My Meetings' and 'Trigger Assessment'. Below these buttons is a dropdown menu with a '1' in a green circle next to it. The dropdown menu is open, showing 'Surgical Foundations' (selected), 'Otolaryngology - Head & Neck Surgery', and 'Surgical Foundations'. Below the dropdown menu, there are two green checkmarks. Below the checkmarks, there is a table with columns: 'Stages', 'Assessments' (with a '0' in a circle), 'Assessments Items', 'Trends', 'Comments', and 'Pins'. Below the table, there are two sections: 'Transition to Discipline' with a dropdown arrow and a green checkmark, and 'Foundations of Discipline' with an upward arrow and a grey circle. Below these sections, there is a card for 'F1 Providing initial management for critically ill surgical patients' with a green checkmark and a dropdown arrow. At the bottom of the card, it says '13 Assessments' and '0 Archived Assessments'.

7.3.2 Stages

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

Transition to Discipline ▾



Foundations of Discipline ^



F1 Providing initial management for critically ill surgical patients ! ☰ ✓

Current Assessments

6	Surgical Foundations: Foundations EPA#1 4	0 0	0 0
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

Score achieved per EPA completed.

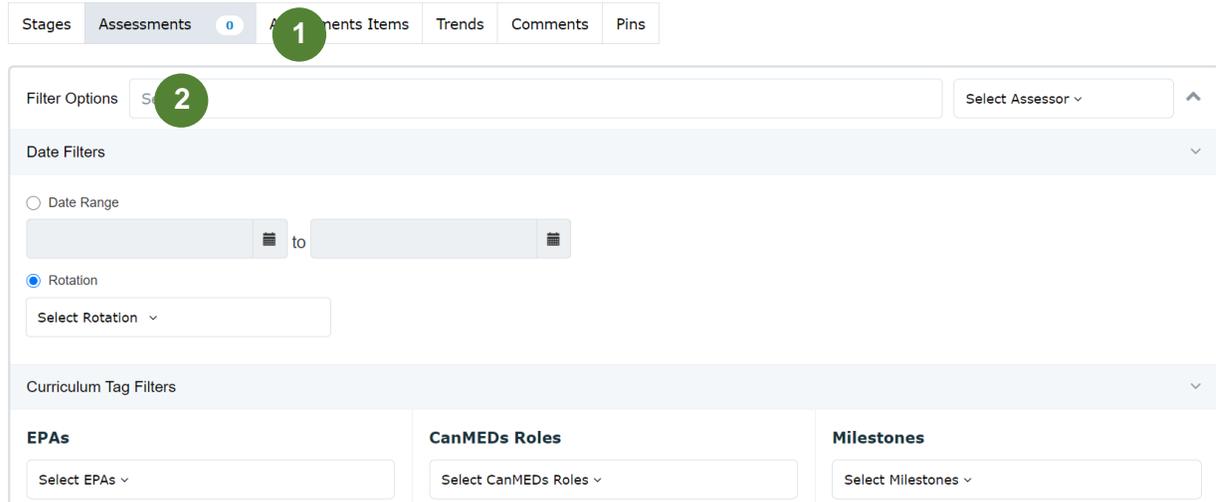
7.3.3 Assessments and Providing Faculty Feedback

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

CBME Dashboard

SURG-F: Surgical Foundations

Surgical Foundations



The screenshot shows the CBME Dashboard interface. At the top, there is a navigation bar with tabs: Stages, Assessments (1), Assessments Items, Trends, Comments, and Pins. Below the navigation bar, there is a 'Filter Options' section with a search box (2) and a 'Select Assessor' dropdown. Underneath, there are 'Date Filters' and 'Curriculum Tag Filters'. The 'Date Filters' section includes a 'Date Range' option with a date picker and a 'Rotation' option with a 'Select Rotation' dropdown. The 'Curriculum Tag Filters' section includes three dropdown menus: 'EPAs', 'CanMEDs Roles', and 'Milestones'.

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

Assessor Feedback – to provide assessors with feedback, simply click on the thumb's up icon (4) beside the EPA you wish to provide the feedback on. You can then add a comment prior to submitting. The purpose of this is to let your assessors know if their narrative comments were helpful to your learning or not.

Pinning Assessments – to pin an assessment, you can simply click on the thumbtack icon (5). This will store your saved assessments in the Pin section of the CBME Progress, 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 Progress by further breakdowns such as Assessment Items, Trends, and Comments (1). These tabs work in the same way as presented in 7.3.3.

CBME Progress

SURG-F: Surgical Foundations

Surgical Foundations

Stages Assessments 0 Assessments Items Trends Comments Pin 1

Filter Options Search Select Assessor

Date Filters

Date Range
 [] to []

Rotation
 Select Rotation

Curriculum Tag Filters

EPAs CanMEDs Roles Milestones
 Select EPAs Select CanMEDs Roles 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 Progress.

CBME Progress

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

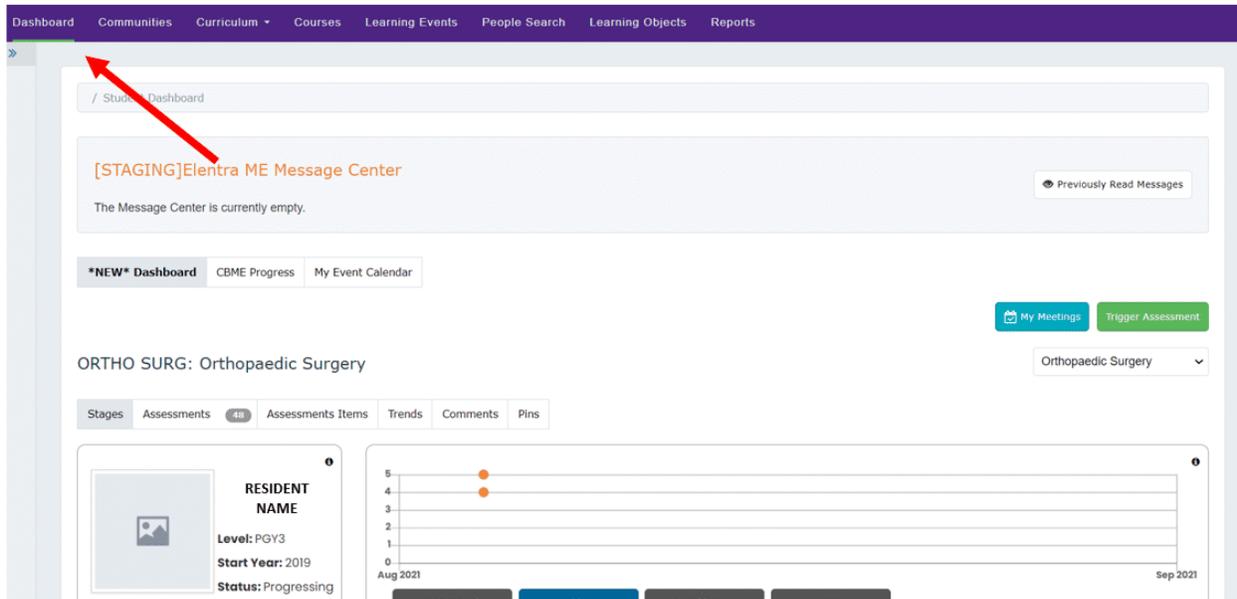
7.4 NARRATIVE NOTES

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

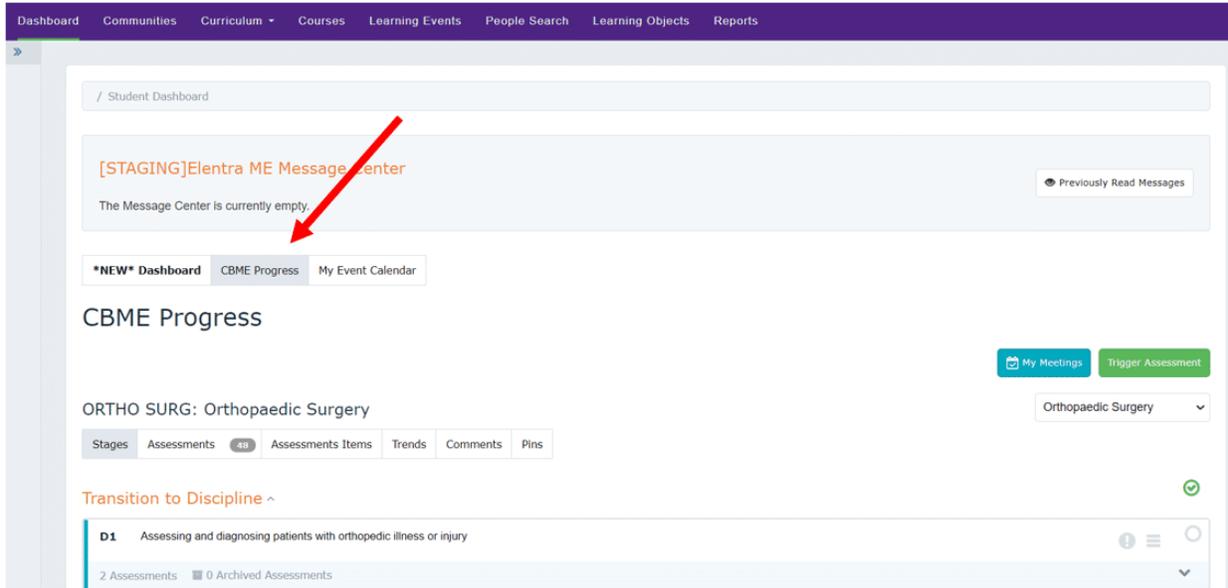
7.5 NEW RESIDENT DASHBOARD

7.5.1 Accessing the NEW Resident Dashboard

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



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



7.5.2 Key Dashboard Features

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

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

NOTE: Assessment Plan data is calculated once daily while all other Dashboard features are updated automatically.

ORTHO SURG: Orthopaedic Surgery

Orthopaedic Surgery

Stages Assessments **48** Assessments Items Trends Comments Pins

1



RESIDENT NAME
 Level: PGY3
 Start Year: 2019

Status: Progressing As Expected
 Last EPA Achieved: D
 Last CC Meeting: Aug 01, 2021



3

EPA Metrics	RESIDENT NAME	
	Since Last CC Meeting	Stage Total (F)
EPA Observations		
Requested	0	15
Completed	0	15
Entrustment Score >= 4	0	13
Expired	0	0

4

NOTES Filter: All

No Entries to Display.

5 Transition to Discipline Achieved **6**

7 0 0 1 0 3 200% **7**

8 Assessment Plan

At Least 1 Observation(s) of Achievement 2 / 1

[Surgical Foundations: Transition to Discipline EPA#1](#) Completed: Nov 25, 2018 Assessor: **9**

[Surgical Foundations: Transition to Discipline EPA#1](#) Completed: Nov 19, 2018 Assessor:

At Least 1 Different Assessors 2 / 1

10 All Assessments **11**

D2: Recognizing and initiating early management for critically ill surgical patients	0	0	0	1	1	133%* 11
D3: Documenting clinical encounters	0	0	1	2	0	120% 11
D4: Demonstrating handover technique	0	0	0	1	1	133% 11
D5: Demonstrating ability to function in the operating room	0	0	0	1	0	100% 11
D6: Repairing simple skin incisions/lacerations	0	0	0	2	2	300% 11

TABLE B – Dashboard Key Features Explanations

<p>1) Resident Information</p>	<p>Level: The resident's current PGY level of training</p> <p>Start Year: The year the resident started their current program</p> <p>Status: The current status as determined by the Competence Committee (CC). The status is set when a CC Meeting Note is logged*</p> <p>Last EPA Achieved: The most recent EPA that has been achieved, as determined by the CC*</p> <p>Last CC Meeting: The date of the most recent CC meeting. This is set when a CC Meeting Note is logged*</p> <p>*N/A will be displayed if the resident is new and has not yet achieved an EPA or been reviewed by the CC</p>
<p>2) Scatter Plot</p>	<p>The scatter chart shows the relationship between the entrustment score (y) over time (x). Each plot on the chart represents a completed EPA assessment; hovering over the plot will display the assessment title, assessor, completion date, and narrative comments. The plots are colour coded by stage of training, seen throughout Elentra:</p> <ul style="list-style-type: none"> Blue - Transition to Discipline Green - Foundations of Discipline Orange - Core of Discipline Red - Transition to Practice <p>There are options to display all EPA assessments completed on the resident in the past 30, 90, or 365 days; as well as since the last CC Meeting (this option will only be displayed if a CC Meeting Note has been logged).</p>
<p>3) EPA Metrics</p>	<p>This chart displays the number of EPA metrics for the resident since the last CC Meeting as well as for the current stage of training.</p> <p>Requested: The number of EPA assessments that were triggered by either the resident or the assessor</p> <p>Completed: The number of EPA assessments that were completed</p>

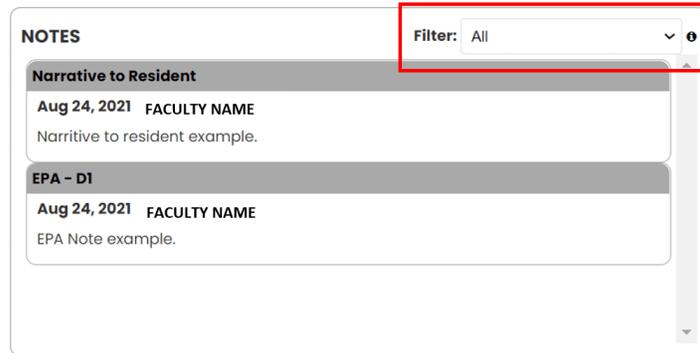
	<p>Entrustment Score ≥ 4: The number of completed assessments with an entrustment score of 4 or 5</p> <p>Expired: The number of EPA assessments that expired without being completed in 30 days</p> <p>Please note: The number of EPA assessments that were completed or expired could include assessments that were initiated prior to the last CC Meeting, so these totals could be higher than the number requested.</p> <p>Stage Total Colouring:</p> <ul style="list-style-type: none"> • Green: +6 above cohort average • Blue: +/-5 from cohort average • Yellow: -6 below cohort average
4) Notes	<p>Different types of notes are added to your dashboard by your program's faculty members and/or CC:</p> <p>EPA Note: This type of note is linked to a specific EPA.</p> <p>Narrative: This type of note can be used to provide narrative feedback to the resident that is not tied to a specific EPA.</p>
5) Accordions	<p>Click on the dropdown arrows to expand each stage of training and EPA.</p> <p>Expanding the stage of training will reveal the EPAs associated with the stage, with further dropdown options to view the EPA Assessment Plan.</p>
6) Achieved Stages & EPAs	<p>Green checkmarks indicate that the corresponding EPA or stage of training have been achieved. This is added manually by the program's CC.</p>
7) Entrustment Scale Scores	<p>This area provides a summary of the completed EPA assessments and their associated entrustment scale score.</p> <p>The first box shows how many EPA assessments were completed with a score of 1, the next with a score of 2, and so on.</p>

<p>8) Assessment Plan</p>	<p>Note - This feature will be missing if your Assessment Plan has not yet been configured by the PGME Elentra Team. Please see the note below for more information on this.</p> <p>Each EPA with an Assessment Plan has the ability to drill down further into each Contextual Variable (CV) required to meet the EPA requirements. This will show how many of each CV the resident has achieved and how many are required.</p> <p>Drilling down further on each CV accordion will show which assessments meet the given CV. Clicking on these assessments will open the completed form in a new tab for review.</p> <p>NOTE: Assessment Plan data is updated once daily.</p>
<p>9) Assessment Info</p>	<p>Each assessment listed will include the form title, date of completion and the assessor name.</p> <p>Hovering over the comment icon will reveal the mandatory comments left for that given assessment.</p>
<p>10) All Assessments</p>	<p>The All Assessments accordion shows a list of all of the resident's completed assessments for the given EPA.</p>
<p>11) Percentages</p>	<p>Each EPA will show the percentage of completion.</p> <p>Some EPAs may show more than 100%. In this case, the resident has exceeded the Assessment Plan requirements for the given EPA.</p> <p>EPAs may also show more than 100% when NOT all Assessment Plan requirements are met. In these instances, percentages will have an asterisks (*) next to them. For example, a resident may have 3/1 of one required CV, but 1/2 of another required CV. This would show their total as 133%* as they have not completed all requirements.</p>

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

7.5.3 Dashboard Notes

There are two types of notes available for residents to view that may be added by their program's faculty and/or Competence Committee: EPA Notes (can be added by CC only) and Narratives (can be added by all faculty). These notes will be displayed in the Notes section of the Dashboard, which can be filtered by Note type.



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



8.0 REPORT PORTAL

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

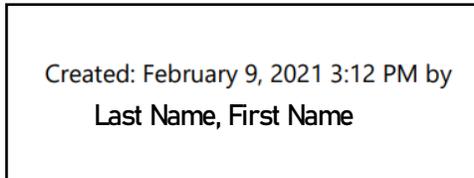
The topics covered in this section include:

- 8.1 Elentra Access Policy
- 8.2 Who Has Access?
- 8.3 Accessing the Reports Portal
- 8.4 Available Reports
 - 8.4.1 Assessor Statistics Reports
 - 8.4.2 Raw EPA Data
 - 8.4.3 Resident EPA Summary & Resident EPA Details
 - 8.4.4 Resident Milestone Summary

8.1 ELENTRA ACCESS POLICY

It is important that all users using the Reports portal is reminded to destroy any files in which they download. It is all Elentra users' responsibility to do so, as well as ensuring to log out of your browser after using.

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



More information on the Elentra Access Policy can be found [here](#).

8.2 WHO HAS ACCESS?

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

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 Elentra Support .	PAs & PDs should have access during course set up, but if not please contact Elentra Support .	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 Elentra Support 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 Elentra Support .	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 Elentra Support 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

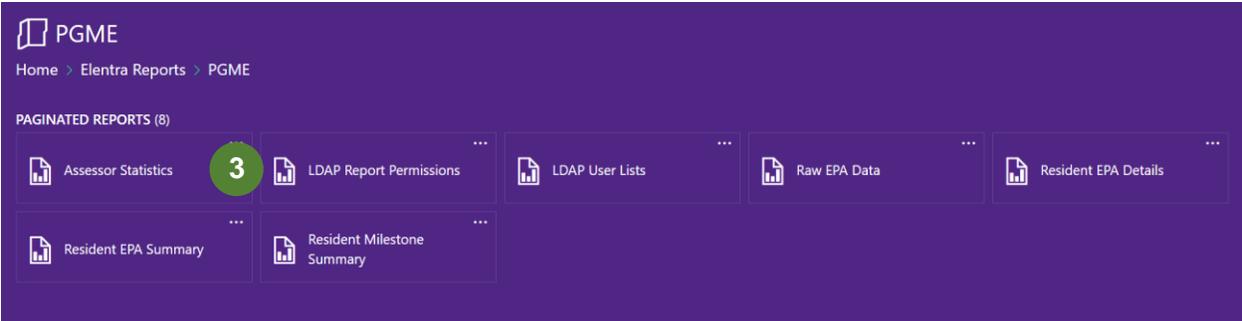
1. To access the portal, click on the Reports **(1)** tab.



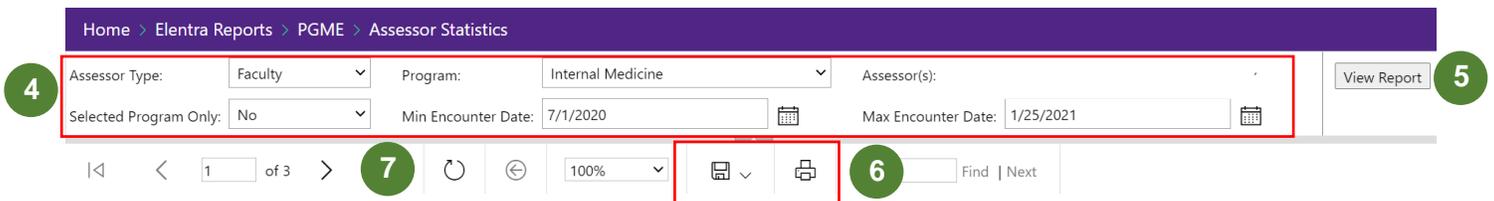
2. A new browser page will then open where you will be asked to enter your UWO credentials. Once logged in, click on Elentra Reports, then PGME **(2)**.



- 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

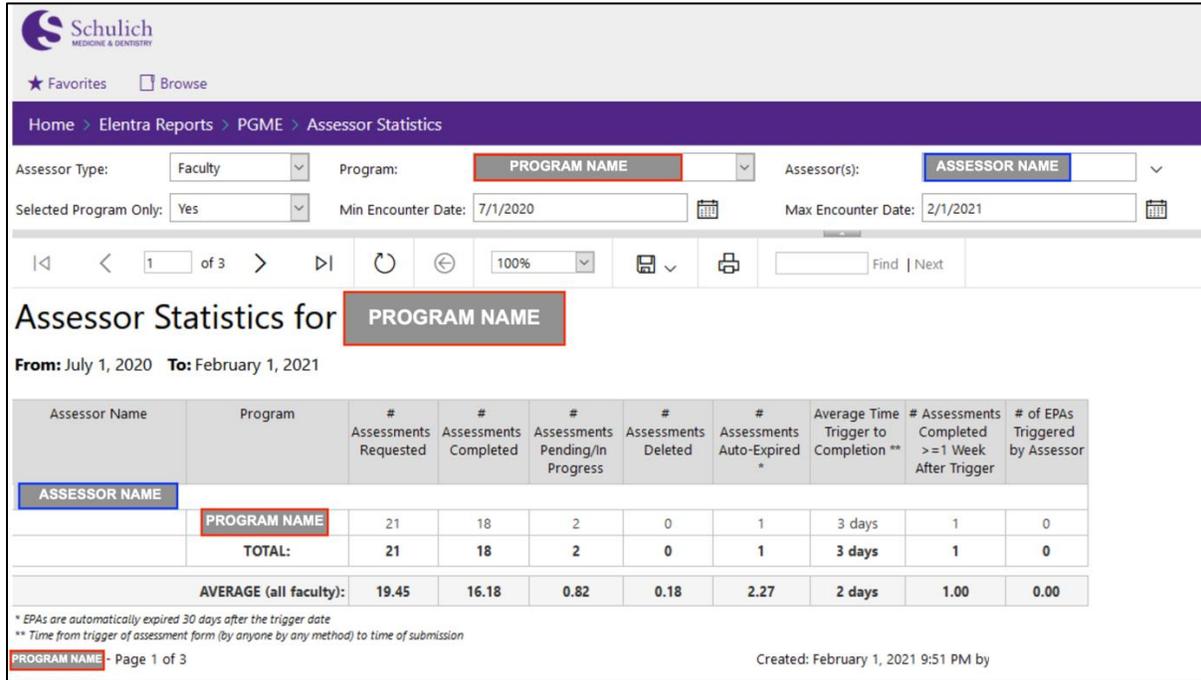
This section of the manual describes the different reports available and the type of information you can find in each report. For instructions on how to navigate to the report portals and how to filter your results, refer to section [8.2](#).

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 is a navigation bar with the Schulich logo and the text "Schulich MEDICINE & DENTISTRY". Below the navigation bar, there are several filters and controls:

- Assessor Type: Faculty (dropdown)
- Program: PROGRAM NAME (dropdown)
- Assessor(s): ASSESSOR NAME (dropdown)
- Selected Program Only: Yes (dropdown)
- Min Encounter Date: 7/1/2020 (calendar icon)
- Max Encounter Date: 2/1/2021 (calendar icon)

Below the filters, there is a table of controls including navigation arrows, a page indicator "1 of 3", a refresh button, a zoom level of "100%", and a search bar with "Find | Next" text.

The main heading of the report is "Assessor Statistics for PROGRAM NAME". Below this, the date range is specified as "From: July 1, 2020 To: February 1, 2021".

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
TOTAL:		21	18	2	0	1	3 days	1	0
AVERAGE (all faculty):		19.45	16.18	0.82	0.18	2.27	2 days	1.00	0.00

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

- 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:

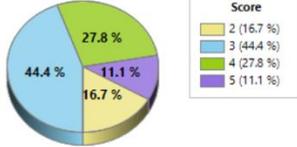
⏪ < 2 of 3 > ⏩
↺ ↻ ↻ 100% ↵
🔍 Find | Next

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

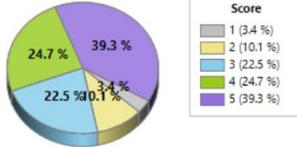
Distribution of Completed Entrustment Scale Scores

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%
TOTAL:		18	11.1%	27.8%	44.4%	16.7%	0.0%

Distribution of Entrustment Scale Scores
EPAs from completed by

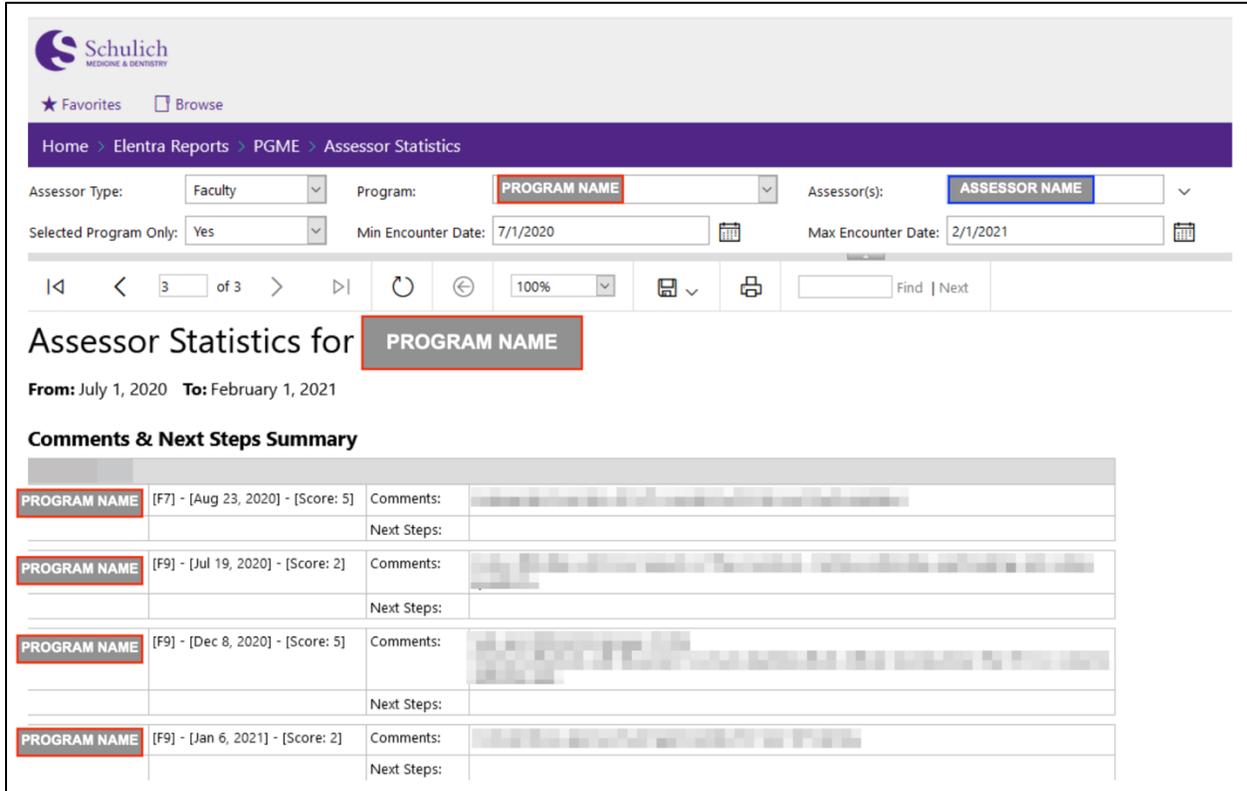


Distribution of Entrustment Scale Scores
EPAs from completed by all faculty



- 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

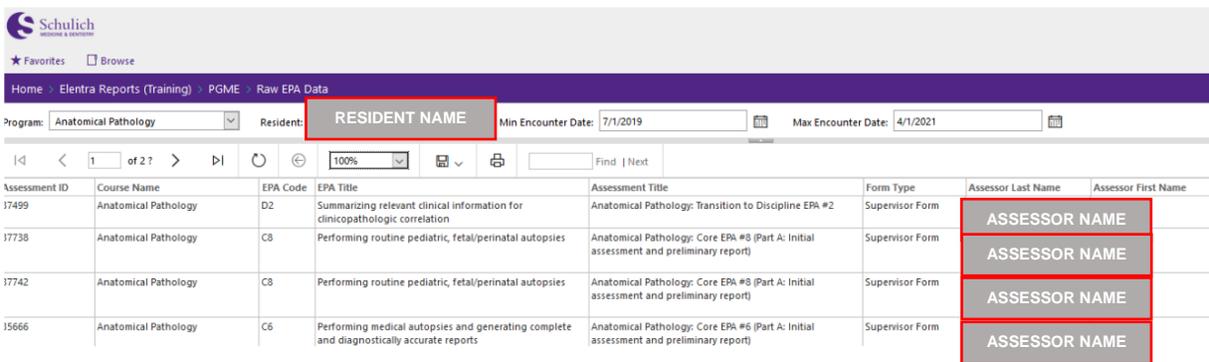
From: July 1, 2020 To: February 1, 2021

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.

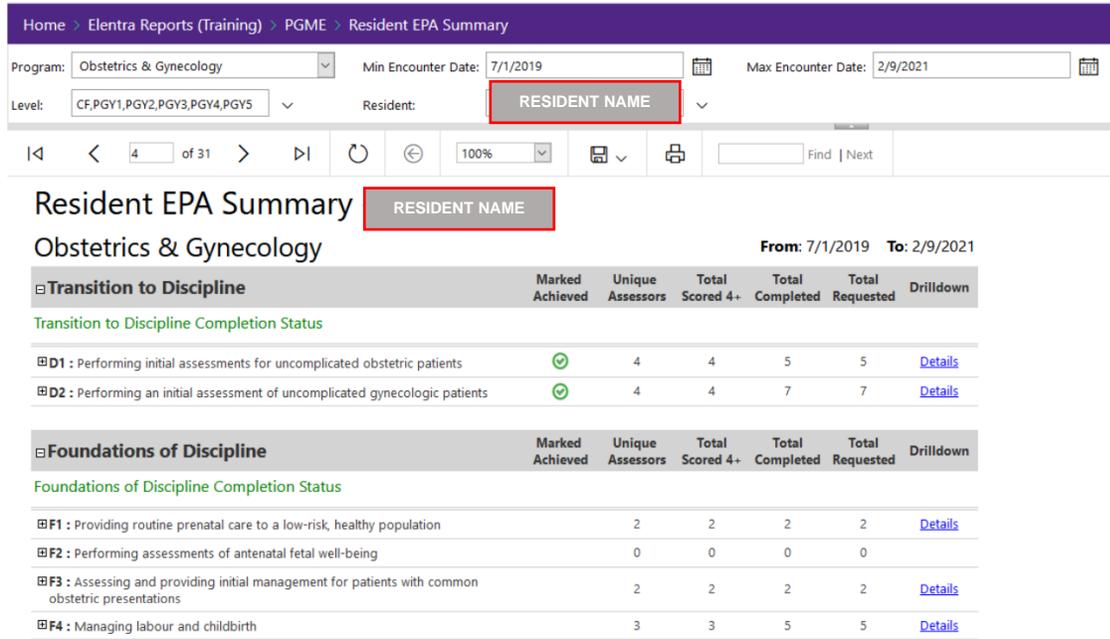


Program: Anatomical Pathology Resident: RESIDENT NAME Min Encounter Date: 7/1/2019 Max Encounter Date: 4/1/2021

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
Transition to Discipline						
Transition to Discipline Completion Status						
D1 : Performing initial assessments for uncomplicated obstetric patients	4	4	4	5	5	Details
D2 : Performing an initial assessment of uncomplicated gynecologic patients	4	4	4	7	7	Details
Foundations of Discipline						
Foundations of Discipline Completion Status						
F1 : Providing routine prenatal care to a low-risk, healthy population		2	2	2	2	Details
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	Details
F4 : Managing labour and childbirth		3	3	5	5	Details

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

9.0 NEW COMPETENCE COMMITTEE DASHBOARD

The New Competence Committee Dashboard aims to replace the previous CBME Dashboard outlined throughout this guide. For the time being, both Dashboards will continue to be available.

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

The topics covered in this section include:

9.1 Accessing Residents' NEW Dashboard

9.2 Key Dashboard Features

9.2.1 TABLE A – Dashboard Key Features Explanations

9.3 Adding Dashboard Notes

9.3.1 CC Meeting Note

9.3.2 EPA Note

9.3.3 General Note

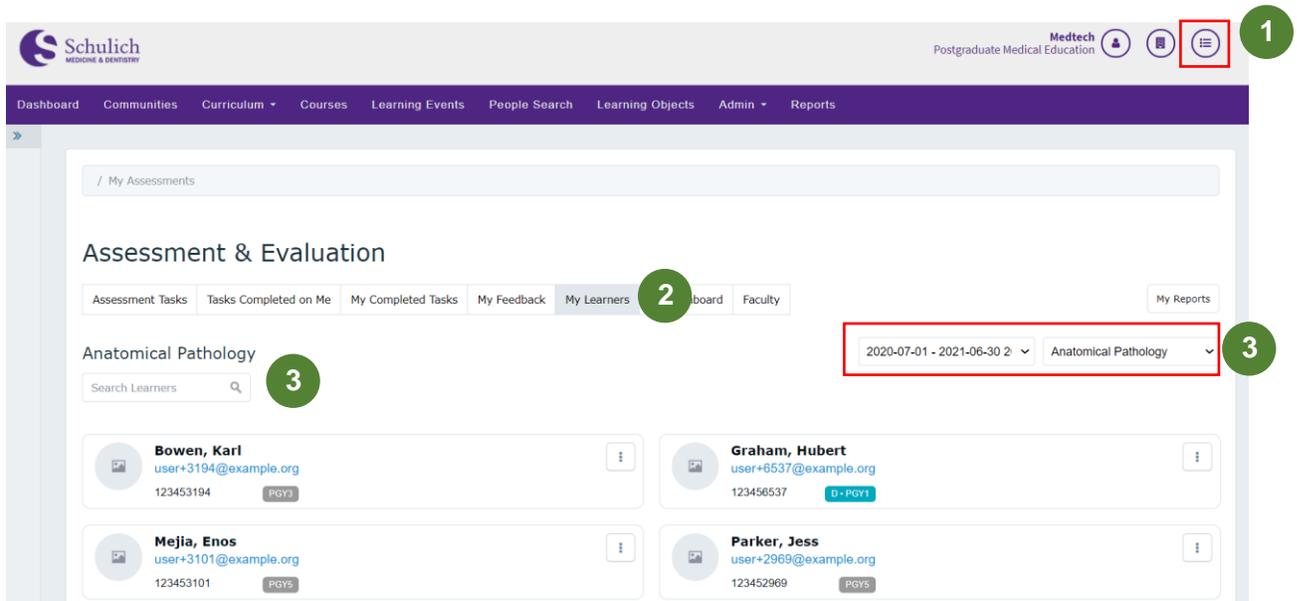
9.3.4 Narrative

9.4 Marking EPAs or Stage of Training Complete

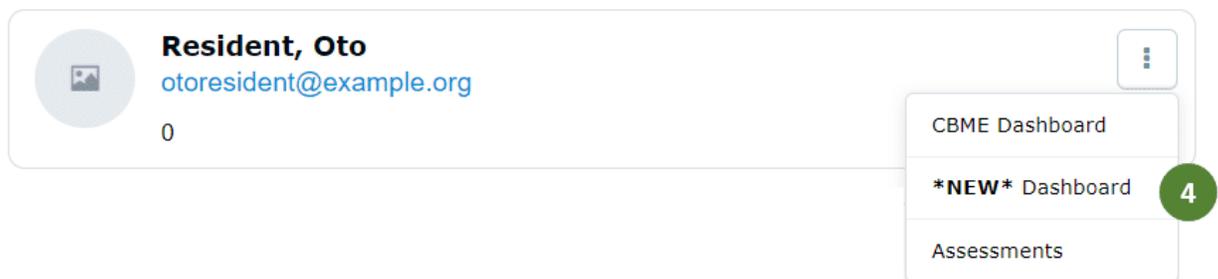
9.1 ACCESSING RESIDENTS' NEW DASHBOARD

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

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



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



9.2 KEY DASHBOARD FEATURES

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

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

NOTE: Assessment Plan data is calculated once daily while all other Dashboard features are updated automatically.

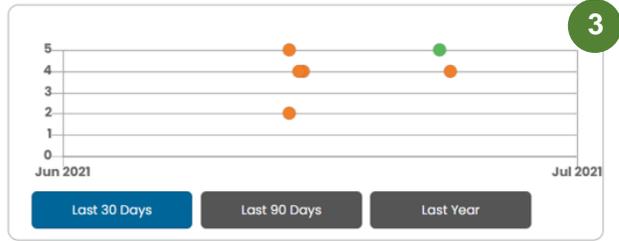
1

RESIDENT NAME
 Level: PGY3
 Start Year: 2018

Status: N/A
 Last EPA Achieved: C45
 Last CC Meeting: N/A

2

RESIDENT	AVERAGE
STAGE D EPAS ACHIEVED 100 % (1)	STAGE D EPAS ACHIEVED 33.3% (0)



4

EPA Metrics	RESIDENT NAME		Cohort Average
	Since Last CC Meeting	Stage Total (D)	Stage Total (D)
EPA Observations			
Requested	0	5	2.3
Completed	0	5	2.3
Entrustment Score >= 4	0	5	2

5

NOTES Filter: All Add Note

No Entries to Display.

6 Transition to Discipline Achieved

7 D1: Performing the preoperative preparation of patients for basic surgical procedures 0 0 1 0 3 200%

8 Assessment Plan

At Least 1 Observation(s) of Achievement 2 / 1

9 Surgical Foundations: Transition to Discipline EPA#1 Completed: Nov 25, 2018 Assessor: !

Surgical Foundations: Transition to Discipline EPA#1 Completed: Nov 19, 2018 Assessor:

At Least 1 Different Assessors 2 / 1

10 All Assessments **11**

D2: Recognizing and initiating early management for critically ill surgical patients	0	0	0	1	1	133%*	✓
D3: Documenting clinical encounters	0	0	1	2	0	120%	✓
D4: Demonstrating handover technique	0	0	0	1	1	133%	✓
D5: Demonstrating ability to function in the operating room	0	0	0	1	0	100%	✓
D6: Repairing simple skin incisions/lacerations	0	0	0	2	2	300%	✓

TABLE A – Dashboard Key Features Explanations

<p>1) Resident Information</p>	<p>Level: The resident's current PGY level of training</p> <p>Start Year: The year the resident started their current program</p> <p>Status: The current status as determined by the Competence Committee (CC). The status is set when a CC Meeting Note is logged*</p> <p>Last EPA Achieved: The most recent EPA that has been achieved, as determined by the CC*</p> <p>Last CC Meeting: The date of the most recent CC meeting. This is set when a CC Meeting Note is logged*</p> <p>*N/A will be displayed if the resident is new and has not yet achieved an EPA or been reviewed by the CC</p>
<p>2) Cohort Comparison</p>	<p>This is a comparison of a resident's progress within their current stage of training compared to the average of other residents in the same program and stage of training.</p> <p>Stage: The resident's current CBME Stage of Training:</p> <ul style="list-style-type: none"> D = Transition to Discipline F = Foundations of Discipline C= Core of Discipline P = Transition to Practice <p>EPAs Achieved: The number of EPAs achieved within the resident's current stage of training (achieved EPAs will have a green check mark as added by the CC). Displayed as both a percentage and integer; colour-coded as follows:</p> <ul style="list-style-type: none"> • Green: Above average • Blue: Same as average • Yellow: Below average
<p>3) Scatter Plot</p>	<p>The scatter chart shows the relationship between the entrustment score (y) over time (x). Each plot on the chart represents a completed EPA assessment; hovering over the plot will display the assessment title, assessor, completion date, and narrative</p>

	<p>comments. The plots are colour coded by stage of training, seen throughout Elentra:</p> <ul style="list-style-type: none"> Blue - Transition to Discipline Green - Foundations of Discipline Orange - Core of Discipline Red - Transition to Practice <p>There are options to display all EPA assessments completed on the resident in the past 30, 90, or 365 days; as well as since the last CC Meeting (this option will only be displayed if a CC Meeting Note has been logged).</p>
<p>4) EPA Metrics</p>	<p>This chart displays the number of EPA metrics for the resident since the last CC Meeting as well as for the current stage of training, and compares it to the cohort average in the same program and stage of training.</p> <p>Requested: The number of EPA assessments that were triggered by either the resident or the assessor</p> <p>Completed: The number of EPA assessments that were completed</p> <p>Entrustment Score ≥ 4: The number of completed assessments with an entrustment score of 4 or 5</p> <p>Expired: The number of EPA assessments that expired without being completed in 30 days</p> <p>Please note: The number of EPA assessments that were completed or expired could include assessments that were initiated prior to the last CC Meeting, so these totals could be higher than the number requested.</p> <p>Stage Total Colouring:</p> <ul style="list-style-type: none"> • Green: +6 above cohort average • Blue: +/-5 from cohort average • Yellow: -6 below cohort average
<p>5) Notes</p>	<p>Anyone with CC Dashboard access can add/edit/delete their own notes, and they can view notes added by others, with the exception of CC Meeting Notes, which can only be added and reviewed by CC members.</p>

	<p>CC Meeting Note: This type of note is used to add dates of CC Meetings and the Resident Status as recommended at the meeting. The CC Meeting Date and Resident Status will be displayed in the Resident Profile, and the date will also determine which data is displayed in the Scatter Chart and the EPA Metrics Chart. This type of note is NOT visible to the resident.</p> <p>EPA Note: This type of note is linked to a specific EPA. EPA Notes are visible to the resident.</p> <p>General Note: This type of note can be used for any general purposes; it can be used to upload a file that is not necessarily CC Meeting or EPA related; and comments can be added. This type of note is NOT visible to the resident.</p> <p>Narrative: This type of note can be used to provide narrative feedback to the resident that is not tied to a specific EPA. This type of note is visible to the resident.</p>
6) Accordions	<p>Click on the dropdown arrows to expand each stage of training and EPA.</p> <p>Expanding the stage of training will reveal the EPAs associated with the stage, with further dropdown options to view the EPA Assessment Plan.</p>
7) Entrustment Scale Scores	<p>This area provides a summary of the completed EPA assessments and their associated entrustment scale score.</p> <p>The first box shows how many EPA assessments were completed with a score of 1, the next with a score of 2, and so on.</p>
8) Assessment Plan	<p>Note - This feature will be missing if your Assessment Plan has not yet been configured by the PGME Elentra Team. Please see the note below for more information on this.</p> <p>Each EPA with an Assessment Plan has the ability to drill down further into each Contextual Variable (CV) required to meet the EPA requirements. This will show how many of each CV the resident has achieved and how many are required.</p>

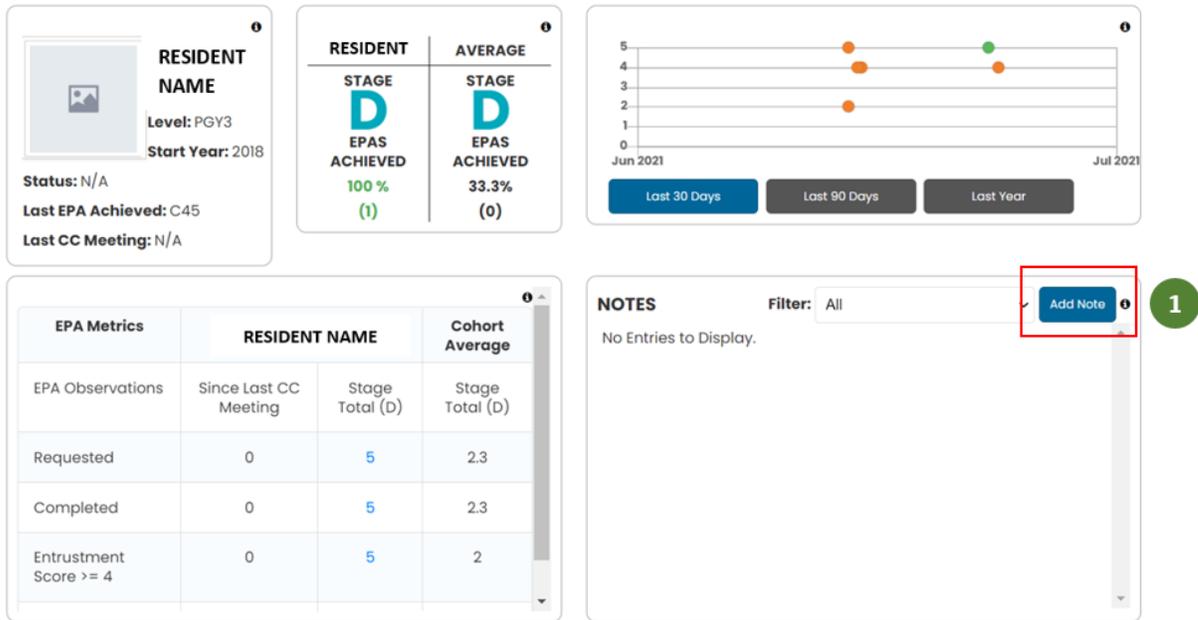
	<p>Drilling down further on each CV accordion will show which assessments meet the given CV. Clicking on these assessments will open the completed form in a new tab for review.</p> <p>NOTE: Assessment Plan data is updated once daily.</p>
9) Assessment Info	<p>Each assessment listed will include the form title, date of completion and the assessor name.</p> <p>If a concern flag has been identified in the EPA form, a exclamation mark (!) will appear. Hovering over this icon will reveal the comment left for the concern flag of that given EPA.</p> <p>Hovering over the comment icon will reveal the mandatory comments left for that given assessment.</p>
10) All Assessments	<p>The All Assessments accordion shows a list of all of the resident's completed assessments for the given EPA.</p>
11) Percentages	<p>Each EPA will show the percentage of completion.</p> <p>Some EPAs may show more than 100%. In this case, the resident has exceeded the Assessment Plan requirements for the given EPA.</p> <p>EPAs may also show more than 100% when NOT all Assessment Plan requirements are met. In these instances, percentages will have an asterisks (*) next to them. For example, a resident may have 3/1 of one required CV, but 1/2 of another required CV. This would show their total as 133%* as they have not completed all requirements.</p>

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

9.3 ADDING DASHBOARD NOTES

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

1. To add a note, simply click Add Note (1).



RESIDENT NAME
Level: PGY3
Start Year: 2018

Status: N/A
Last EPA Achieved: C45
Last CC Meeting: N/A

RESIDENT	AVERAGE
STAGE D	STAGE D
EPAS ACHIEVED 100% (1)	EPAS ACHIEVED 33.3% (0)



Buttons: Last 30 Days, Last 90 Days, Last Year

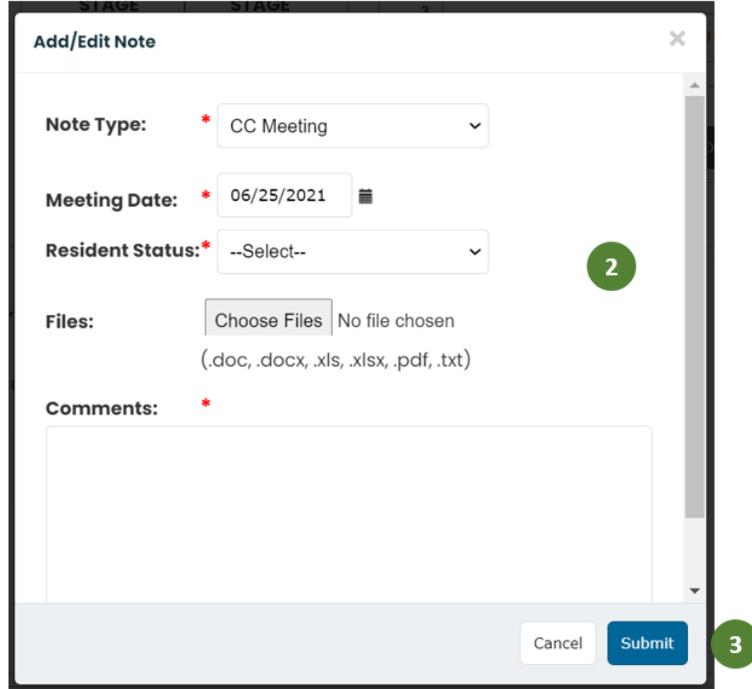
EPA Metrics	RESIDENT NAME		Cohort Average
	Since Last CC Meeting	Stage Total (D)	Stage Total (D)
Requested	0	5	2.3
Completed	0	5	2.3
Entrustment Score >= 4	0	5	2

NOTES Filter: All

Add Note 1

No Entries to Display.

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



The screenshot shows a web form titled "Add/Edit Note" with a close button (X) in the top right corner. The form contains the following fields:

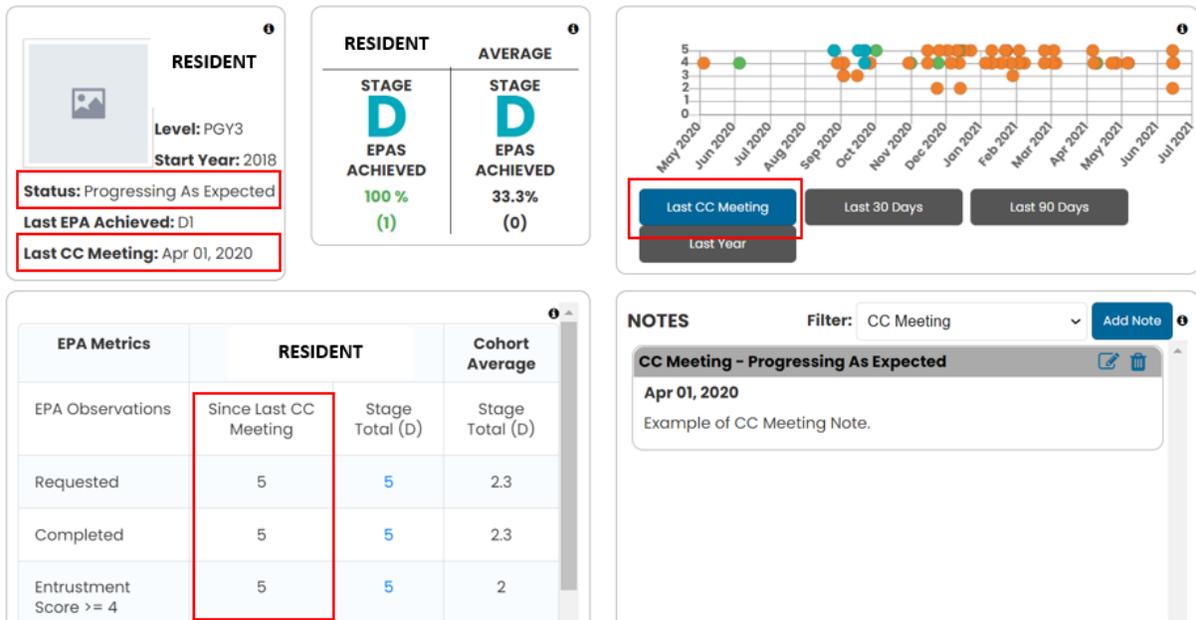
- Note Type:** A dropdown menu with "CC Meeting" selected. A green circle with the number "2" is positioned to the right of this field.
- Meeting Date:** A date input field containing "06/25/2021" and a calendar icon.
- Resident Status:** A dropdown menu with "--Select--" selected.
- Files:** A file upload section with a "Choose Files" button, the text "No file chosen", and supported file types: ".doc, .docx, .xls, .xlsx, .pdf, .txt".
- Comments:** A text area with a red asterisk indicating it is a mandatory field.

At the bottom right of the form, there are two buttons: "Cancel" and "Submit". A green circle with the number "3" is positioned to the right of the "Submit" button.

9.3.1 CC Meeting Note

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

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



RESIDENT
Level: PGY3
Start Year: 2018
Status: Progressing As Expected
Last EPA Achieved: D1
Last CC Meeting: Apr 01, 2020

RESIDENT	AVERAGE
STAGE D EPAS ACHIEVED 100 % (1)	STAGE D EPAS ACHIEVED 33.3% (0)

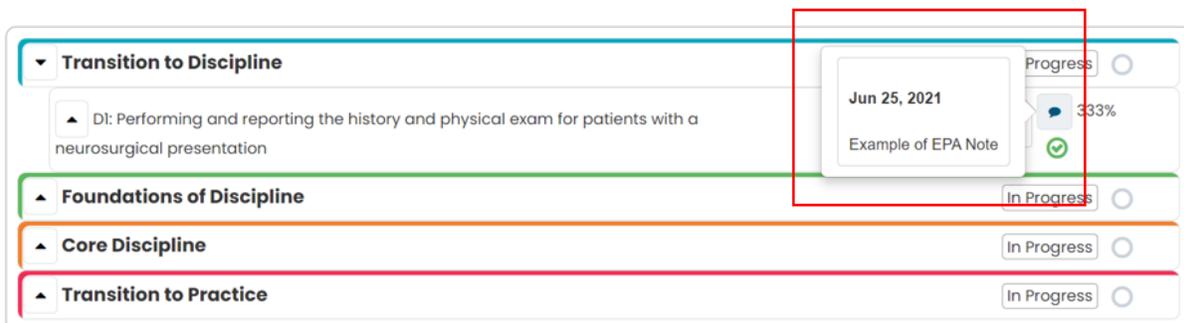
EPA Metrics	RESIDENT	Cohort Average	
EPA Observations	Since Last CC Meeting	Stage Total (D)	Stage Total (D)
Requested	5	5	2.3
Completed	5	5	2.3
Entrustment Score >= 4	5	5	2

NOTES Filter: CC Meeting
CC Meeting - Progressing As Expected
Apr 01, 2020
Example of CC Meeting Note.

9.3.2 EPA Note

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

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

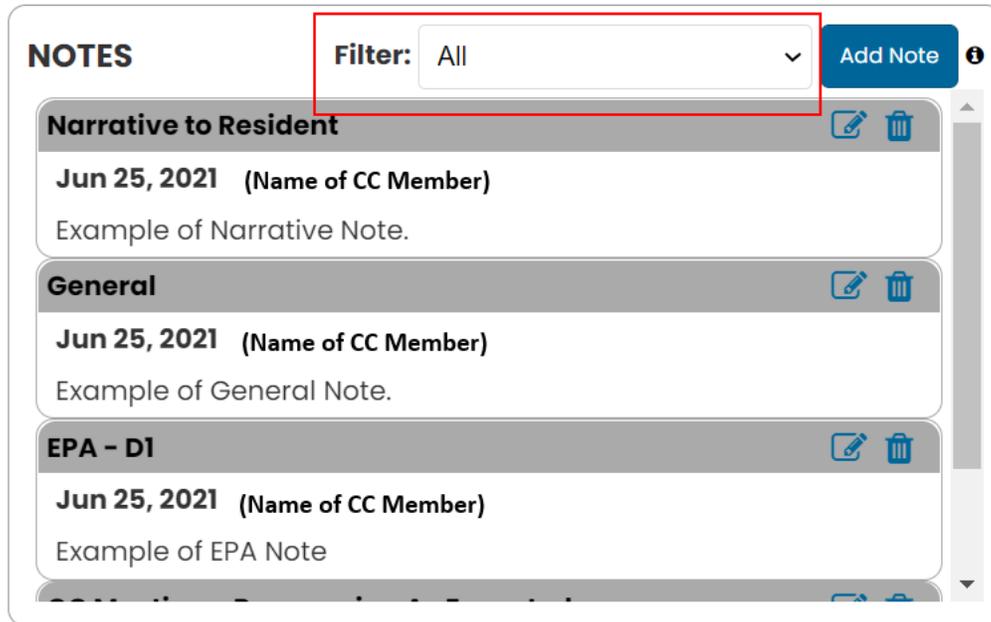


Transition to Discipline
 DI: Performing and reporting the history and physical exam for patients with a neurosurgical presentation
 Progress 333%
 Example of EPA Note
 Jun 25, 2021
 Foundations of Discipline In Progress
 Core Discipline In Progress
 Transition to Practice In Progress

9.3.3 General Note

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

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



9.3.4 Narrative Notes

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

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

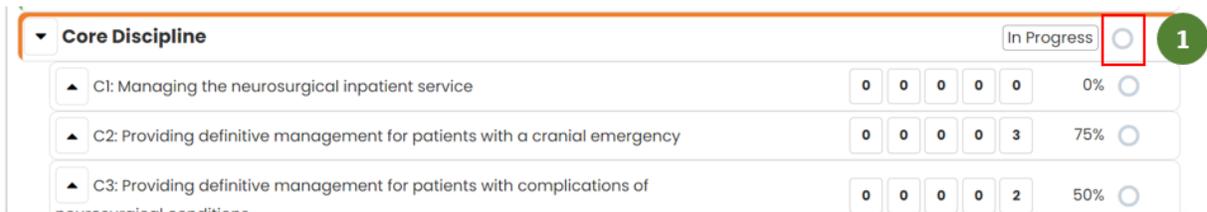
Narratives can also be added by faculty members who do not have CC Dashboard access. More information on this can be found in section [2.3](#) of this guide.

9.4 MARKING EPAS OR STAGE OF TRAINING ACHIEVED

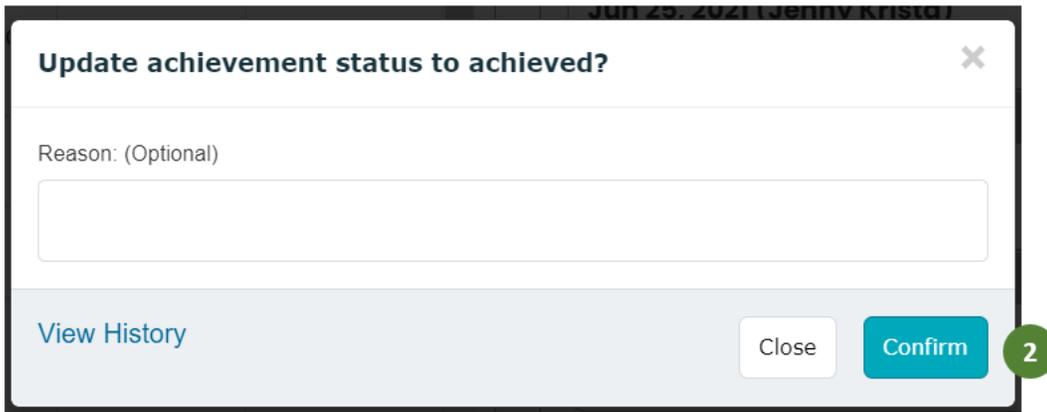
Any EPAs or stages of training already marked as achieved will automatically be transferred to the new CC Dashboard.

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

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



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



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