

CBME in Entrada: PD User Guide

<https://entrada.med.ubc.ca/>

Program Directors do not need to set up EPA assessment forms, distribution, or provide resident access to Entrada. PGME and Digital Solutions manage these tasks.

This guide will introduce some key areas for PDs to get started in the CBME module of Entrada:

1. [Faculty access to Entrada](#)
2. [Academic Advisor groups](#)
3. [Competency Committee member access to program dashboard](#)
4. [Completing form on behalf of resident or faculty \(ad-hoc\)](#)
5. [Viewing a resident's CBME dashboard](#)
6. [Extracting EPA reports](#)
7. [Promoting residents \(approving EPAs\)](#)
8. [Assessment form flags \("prompted responses"\)](#)

For further training or support with program-specific concerns, please contact systems support with the PGME office at pgme.cbme@ubc.ca

1. Faculty access to Entrada

Faculty have two different options for using Entrada, depending on their appointment status.

For those with a Clinical Faculty appointment:

Most clinical faculty are automatically provided with Entrada access. If you do not have access, please make sure you have a [CWL account](#). Once obtained, provide your **CWL username** and email address to your program assistant, who will submit an Entrada access request on your behalf.

For those who do not have a Clinical Faculty appointment:

Please contact your program assistant, who can provide you with an “external assessor” account in Entrada. Alternatively, when a resident triggers an EPA they can add your name and email address to immediately provide you with an "external assessor" account. With “external assessor” access you can receive EPAs via email, but will not have login access to the system.

Updating faculty email addresses:

Email addresses cannot be updated directly in Entrada because this profile information is sourced from [Workday](#), the central records maintained by Human Resources. If faculty need to update their preferred email address in Entrada, they must make edits to their “**Work (Primary)**” email in Workday. Once updated, this information will automatically sync to Entrada. The Department HR Administrator should be able to assist with the update process. The PGME CBME team (pgme.cbme@ubc.ca) will also work with program administrators to provide them with resources and current information about Workday email updates.

*To keep personal information at UBC secure, faculty and staff must update their Campus-Wide Login (CWL) account to an **Enhanced CWL** account. This update features an additional layer of protection with multi-factor authentication (MFA) provided by Duo Security. – **Please see last page for further guidelines***

2. Setting up Academic Advisor groups

Academic Advisors (or CBD Coaches) can be setup if you wish to give specific faculty Entrada access for specific residents or groups of residents. Academic advisors will only be able to view the dashboards and assessments for their assigned residents. Please speak to your PA to set this up.

If you encounter any access or technical issues, please contact entrada.support@ubc.ca.

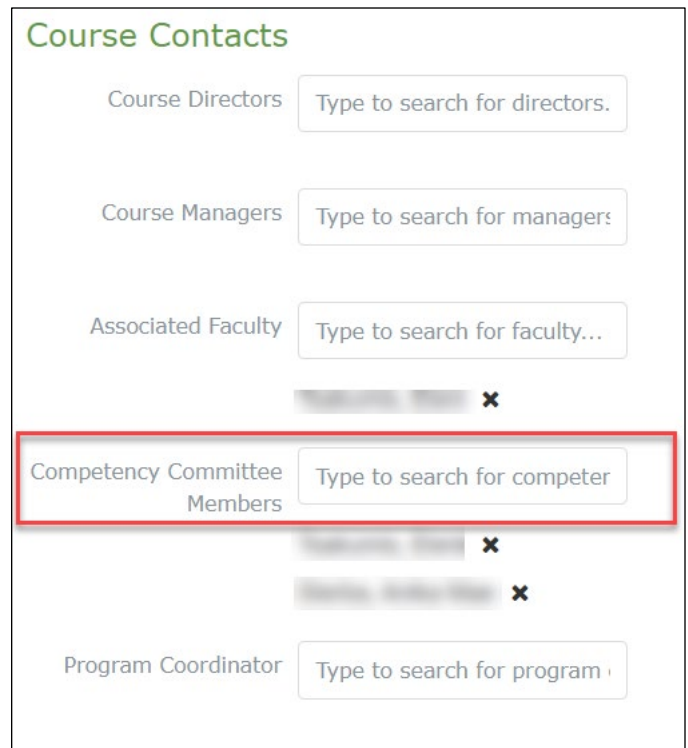
3. Competency Committee member access to program dashboard

Program administrators are responsible for managing Competence Committee member access to program data, as well as requesting a permissions update for new program directors.

Competency Committee members have the ability to see all program resident dashboards and assessments. They can also approve EPAs and promote a resident to the next stage of training.

To add Competence Committee members:

- a. Navigate to **Admin > Manage Courses** and select your Program.
- b. Click on the **Setup** tab.
- c. Scroll down to the **Course Contacts** section and find the **Competency Committee Members**.
- d. Type into the search field to add a new committee member. When a name has been added it will appear below the search box.
- e. After you have added the required names, scroll down to the bottom of the page and click **Save**.



Course Contacts

Course Directors

Course Managers

Associated Faculty

X

Competency Committee Members

X

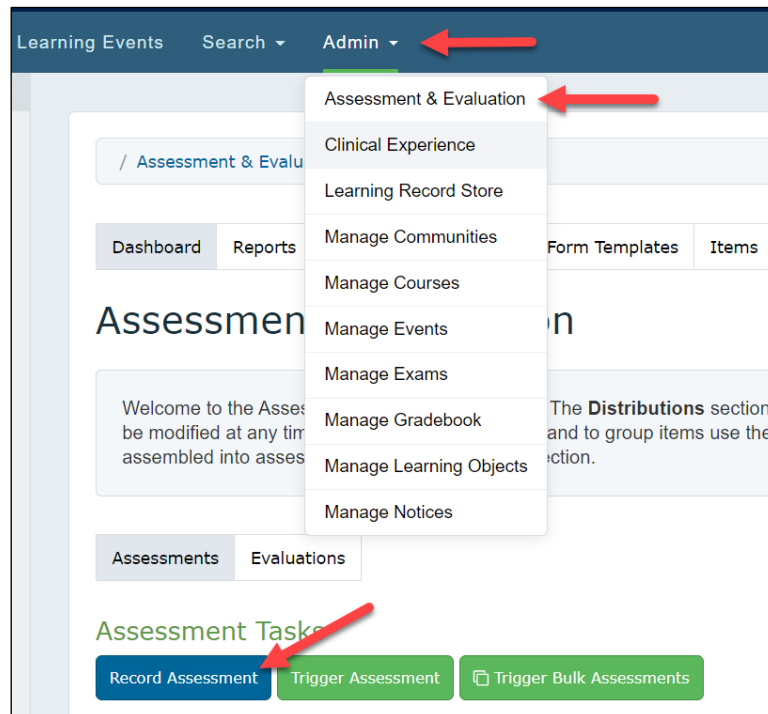
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Program Coordinator

4. Completing form on behalf of resident or faculty (ad-hoc)

Occasionally, the program will need to complete and submit a form on behalf of a resident or faculty member (if, for example, the form was completed on paper). PAs and PDs have access to do this on behalf of a resident.

- a. Navigate to **Admin > Assessment & Evaluation** and select **Record Assessment**.



- b. Select the resident, assessor, and date of encounter.
- c. Complete the form on behalf of resident or assessor and submit.

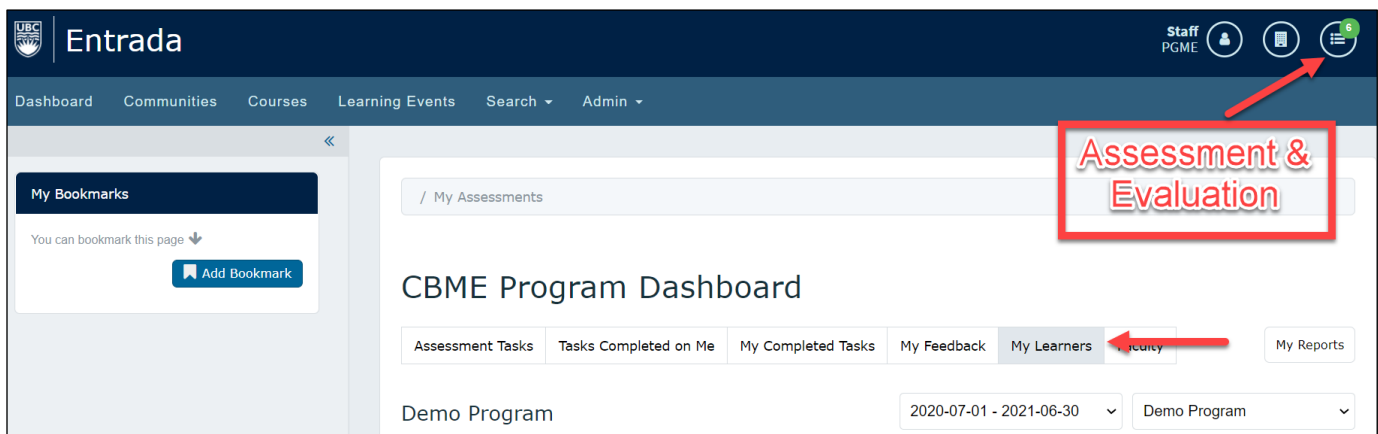
A screenshot of the 'Assessment Tools' form. It contains four input fields: 'Select Resident' with a dropdown menu showing 'Click here to select a resident'; 'Select Assessor' with a dropdown menu showing 'Click here to select an assessor'; 'Select CBME Version' with a dropdown menu showing 'No versions found'; and 'Select Date of Encounter' with a date picker icon.

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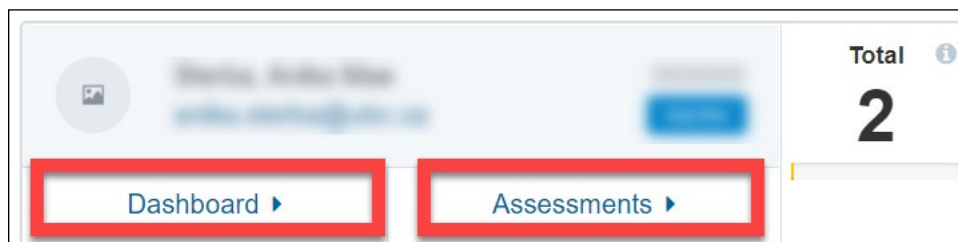
5. Viewing a resident's CBME dashboard or assessments page

A more comprehensive guide to viewing a resident's CBME Dashboard and Assessment's Page can be found [here](#). In addition to the **CBME Dashboard**, PAs and PDs can access a learner's **Assessments page** to view tasks completed on the learner, as well as tasks assigned to the learner. These pages reflect forms completed via distributions and CBME forms triggered by faculty and learner.

- a. Click on the **Assessment & Evaluation** badge located in the top right corner.
- b. Click on the **My Learners** tab. All Program residents will be found here.



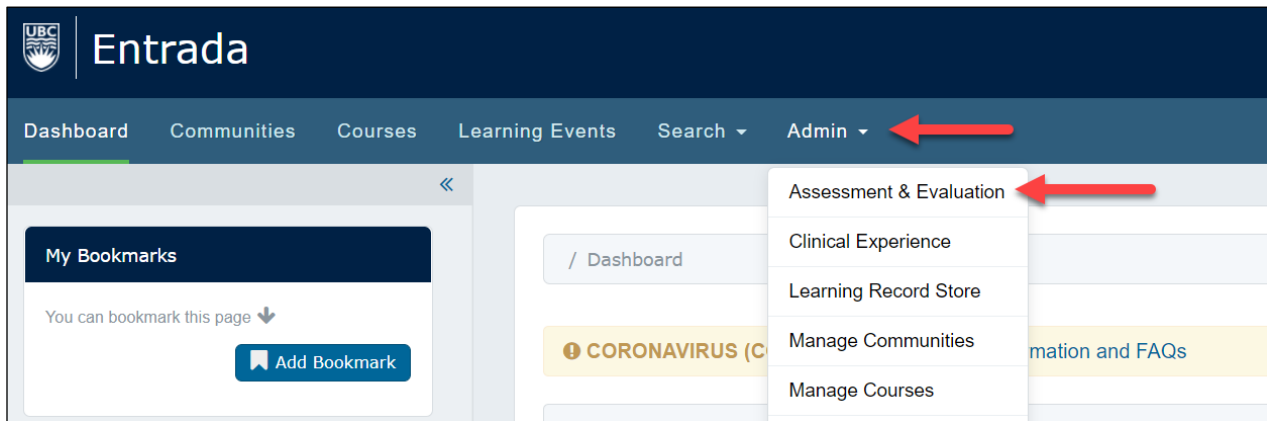
- c. You can view either a resident's CBME **Dashboard** or **Assessments**.



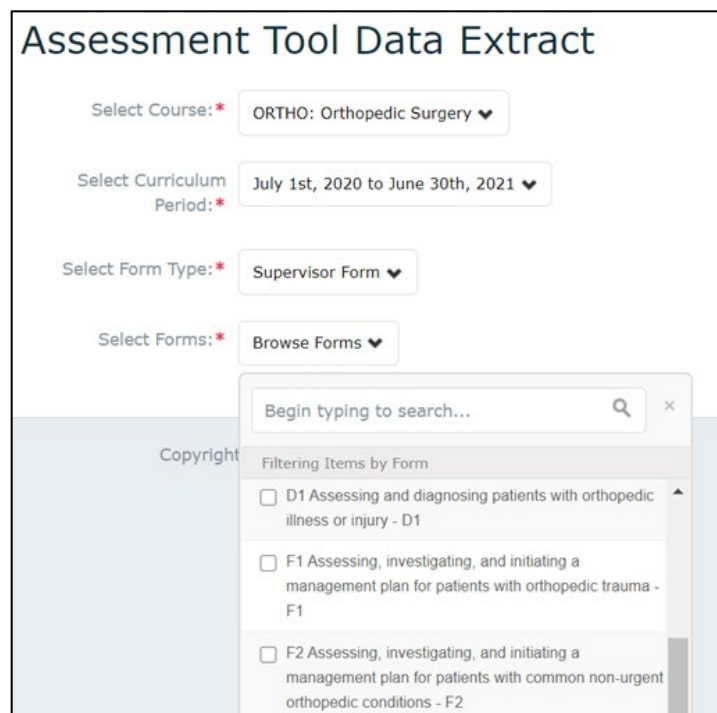
If you encounter any access or technical issues, please contact entrada.support@ubc.ca.

6. Extracting EPA reports

- a. EPA completion data is also available in an extractable report. From the **Admin** tab, choose **Assessment and Evaluation**.



- b. In the **Reports** tab, scroll down to the **Assessment Tool Data Extract** option under Assessments. Then fill out the report form with your program, curriculum year, form type and EPA. Each EPA will produce a separate CSV file, which can then be collated and adapted for program use. Note that Context Variable and Milestone information will vary on each form and spreadsheet.

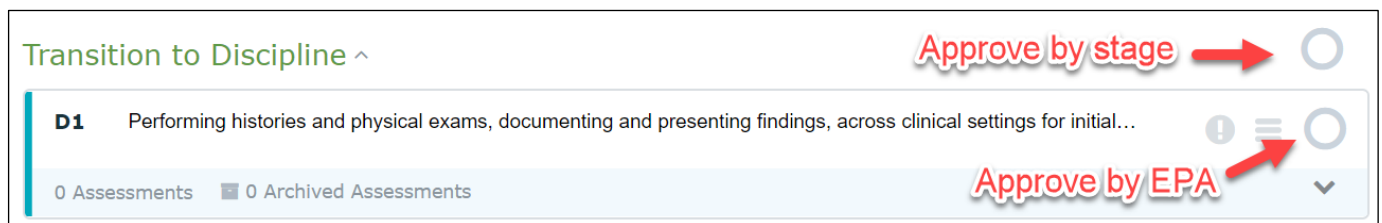
A screenshot of the 'Assessment Tool Data Extract' form. The form has four main sections: 'Select Course:' with a dropdown menu showing 'ORTHO: Orthopedic Surgery'; 'Select Curriculum Period:' with a dropdown menu showing 'July 1st, 2020 to June 30th, 2021'; 'Select Form Type:' with a dropdown menu showing 'Supervisor Form'; and 'Select Forms:' with a dropdown menu showing 'Browse Forms'. Below the 'Select Forms:' dropdown, a search box is visible with the text 'Begin typing to search...'. Below the search box, a list of forms is displayed under the heading 'Filtering Items by Form'. The list includes three items, each with a checkbox: 'D1 Assessing and diagnosing patients with orthopedic illness or injury - D1', 'F1 Assessing, investigating, and initiating a management plan for patients with orthopedic trauma - F1', and 'F2 Assessing, investigating, and initiating a management plan for patients with common non-urgent orthopedic conditions - F2'. The 'D1' checkbox is checked.

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7. Promoting residents (approving EPAs)

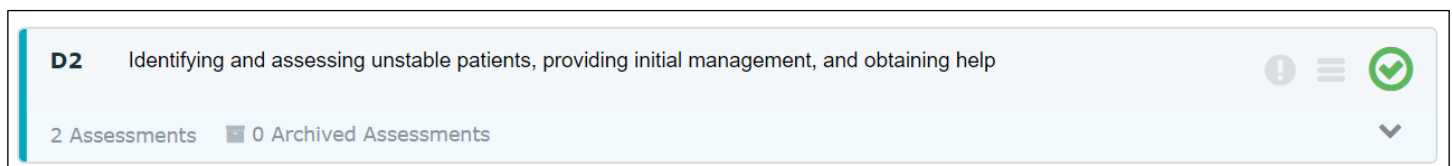
Note: All PDs, Competency Committee members, and PAs will be able to access all resident profiles in that program and have the ability to approve by stage or by EPA. If a Competence Committee member cannot access the program dashboard please see the instructions above for updating their permissions in Course Setup.

- a. In the resident's CBME dashboard, click the grey circles to mark either an EPA or an entire stage of discipline as achieved.

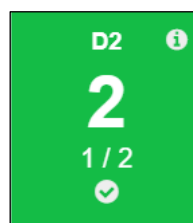


- b. A pop-up dialogue will appear to confirm the EPA as completed.
- c. Once approval is complete a green checkmark will appear both on the program and on the resident's dashboard. The program dashboard will show this EPA or stage as green or achieved regardless of the number of requirements completed by the resident.

View of approved EPA on the resident dashboard:



View of approved EPA on the program dashboard:



If you encounter any access or technical issues, please contact entrada.support@ubc.ca.

8. Assessment form flags (“prompted responses”)

“Prompted responses” are any flagged items on an EPA. At UBC, EPAs include a professionalism or safety flag, but faculty members can also leave a flagged comment with feedback on the EPA form. When a resident’s EPA is flagged, an email notification goes out to the PA and PD, but all current program prompted responses can be viewed and managed within Entrada.

To access them, click on your **Assessment & Evaluation** badge, you will only see a **Prompted Responses** tab if you have any prompted responses for your program.



Assessment & Evaluation

Assessment Tasks | Tasks Completed on Me | My Completed Tasks | My Feedback | My Learners | Faculty | **Prompted Responses**

Search Tasks... | Delivery Date | Delivery Star | Delivery End | |

Once you have clicked the **Prompted Responses** tab, you will see a table displaying a list of your prompted response notifications, the course (i.e. program) it belongs to, and the owner, target, and review the status of each task.

Assessment Tasks | Tasks Completed on Me | My Completed Tasks | My Feedback | My Learners | Faculty | **Prompted Responses** | My Reports

Prompted Response Notifications

Search: Show entries

Task	Course	Owner	Target	Review Status
<input type="checkbox"/> F1 Assessing and managing patients with non-emergent commonly encountered medical and surgical issues	✓ Reviewed

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To see details about any of the flags, click on the title of the EPA and scroll to the bottom of the form. In the **Prompted Responses Section** you can leave comments and check to see whether another program staff member has reviewed or commented on the flag.

Comments can only be viewed by other prompted response recipients and administrators associated with the program. **These review indicators and comments are not visible to residents or assessors.**

Prompted Responses Section

Person Notified	Reviewed	Date Reviewed
[Redacted]	Yes	2020-11-24
[Redacted]	No	N/A

Comment	Commenter	Date Commented
No comments to display		

Enter a Comment (optional)

[Submit Review/Comment](#)

For other CBME user guides, please refer to the UBC PGME [CBME website](#).

Form Notes:

- 1. The Narrative Form is called a Field Note Form in Entrada.**
- 2. Multisource feedback forms: Form 3 (MSF) forms are not yet available in Entrada due to limitations with assessor confidentiality. Some programs have created a Form 1 (Supervisor) form in place of the MSF and some have been using paper forms or surveys such as Qualtrics. Please inquire with PGME for more details.**