

CBME in Entrada: Resident User Guide

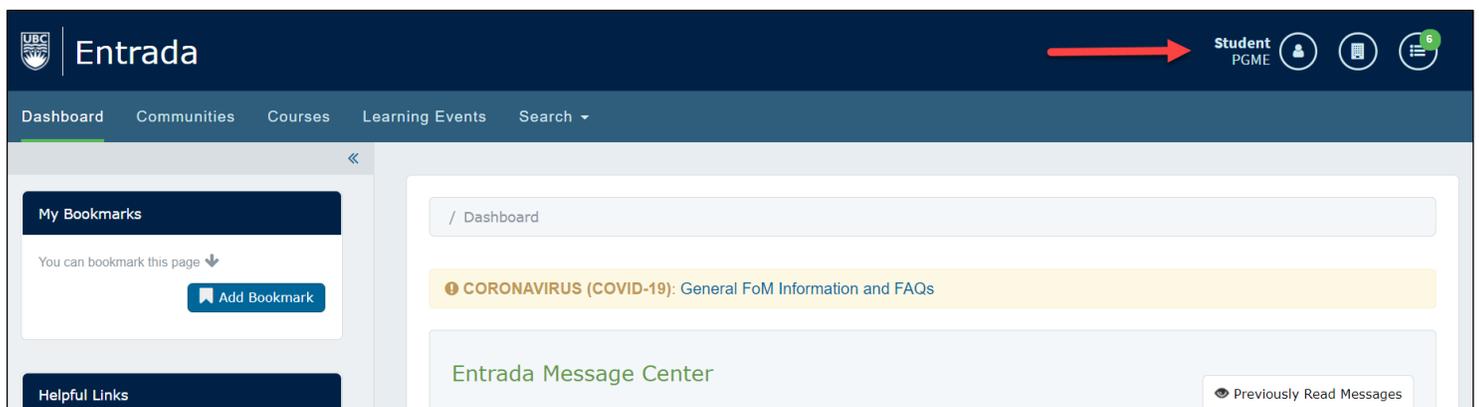
<https://entrada.med.ubc.ca/>

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

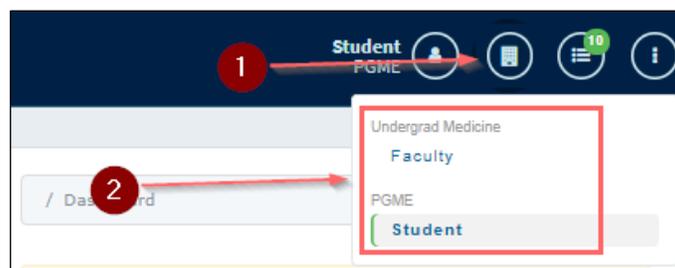
1. [Logging in to Entrada](#)
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1. Logging in to Entrada

Residents are automatically provided with Entrada access, and can log in with a CWL and password. When you first login to Entrada, you may see that you have profiles for both Undergrad and Postgrad Medicine (indicated by the profile icon, near the top right corner).



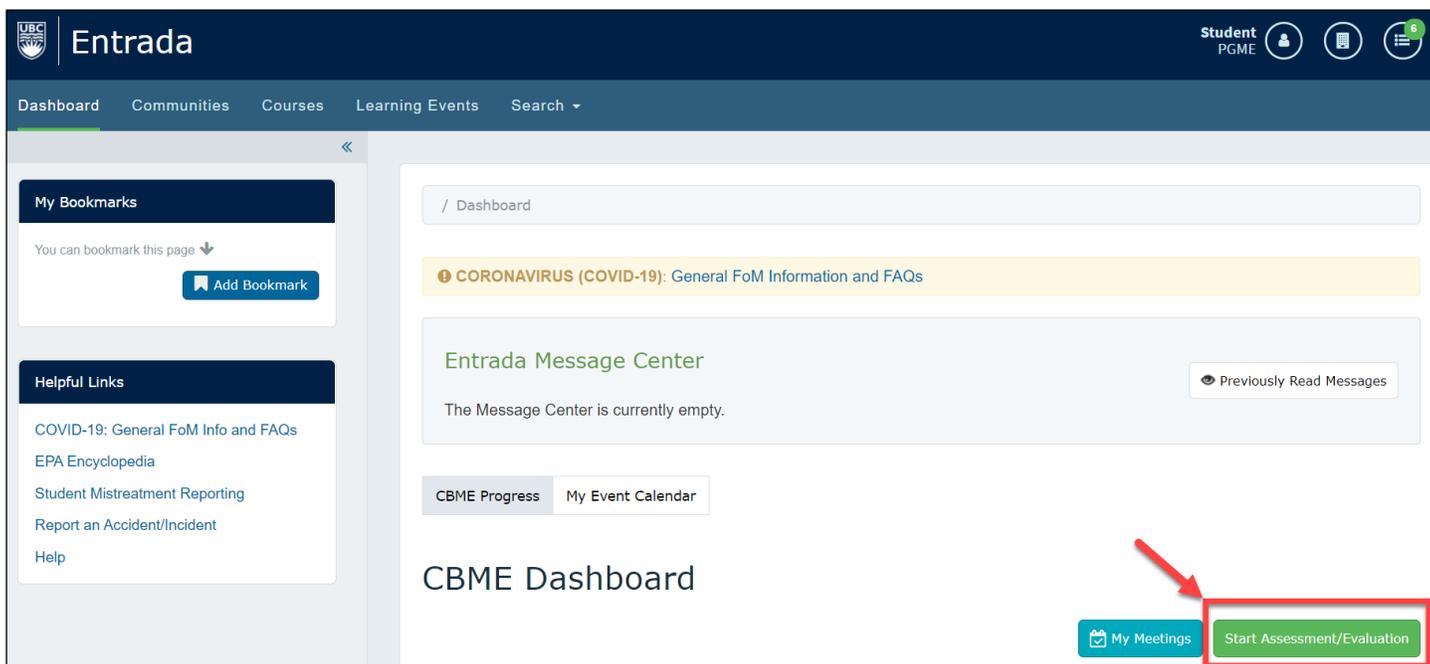
Your access may default to your UGME profile, so always ensure that you are logged into your PGME profile. If necessary, open the organization-change icon (1), to switch to PGME (2).



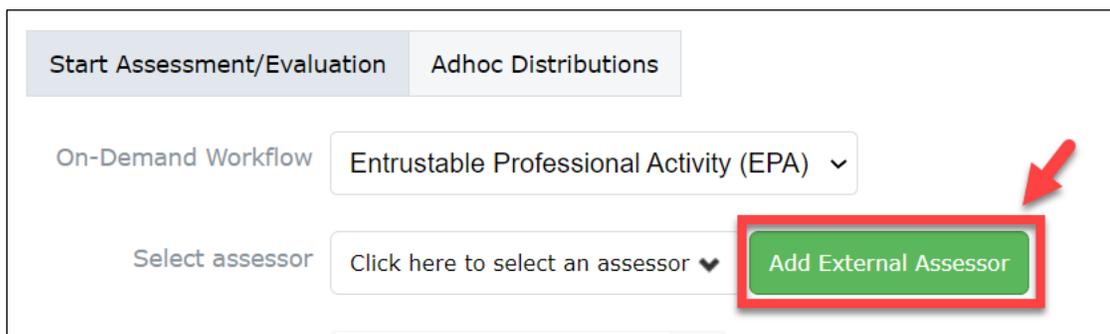
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2. Triggering Assessments

- a. From the CBME Dashboard, you are able to initiate an assessment by clicking on the green **'Start Assessment/Evaluation'** button.



- b. Next, search for the assessor by first or last name. If an assessor does not have a clinical faculty appointment and cannot request an internal Entrada account, you can add them as an **“External Assessor”**:



- When adding an external assessor, first search in the “Select assessor” field to confirm that the individual does not have an account (trying several versions of their name, as needed). This check is helpful as some faculty have an account set up, but have never logged in.
- If they do not appear, click the **“Add External Assessor”** button.
- Add the assessor’s details: first name, last name, and email address.
- Click **“Add”** and continue the EPA submission process.

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- c. Next, add the date of encounter and choose an assessment delivery method. If you choose “Complete and confirm via PIN,” the assessor must have already set up a PIN in the “Account information” tab of their Entrada profile.

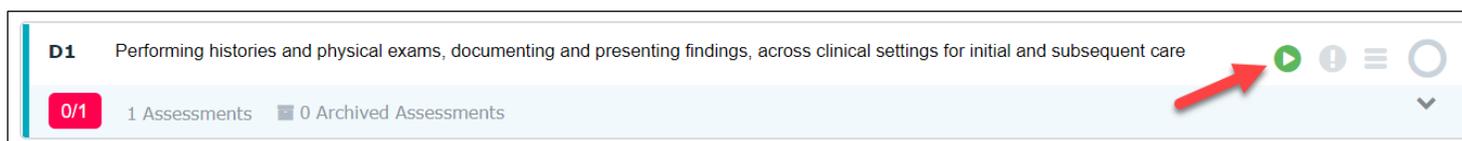
Select assessment method

- 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
Complete an assessment based on the selected tool. Upon completion of the assessment, the assessor will confirm it on the spot using their Personal Identification Number (PIN) and adjust your assessment as necessary.
- 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.

- d. Last, select the relevant EPA from the dropdown list. You will only see the EPAs for your current program(s). You will then have the option to preview the form or begin the assessment.

Quick start EPA form trigger

From the **Stages Tab** of your main CBME dashboard, you also have the option of a quick start EPA form trigger. To access, use the green arrow next to an EPA title. This brings you directly to a specific EPA without having to choose from the list of forms.



Senior resident assessors:

When a resident assesses another resident, **the junior resident must trigger the assessment.** A senior resident does not have the ability to initiate an assessment.

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3. Navigating the CBME Dashboard

The resident CBME Dashboard is where you can track your progress across EPAs and stages.

The dashboard includes several tabs to help you navigate your assessment data:

Stages – view progress in EPAs, access reports for different completed assessments

Assessments – view completed, in progress, pending and deleted assessments (see details below)

Assessment Items – view individual assessment items

Trends – see visualizations of your progress in different EPAs

Comments – view all narrative feedback from tasks

Pins – see comments and assessments you or a competence committee member pinned for reference

Filter Options:

On each tab except Stages, you can apply filters to limit what you see on the screen. Filter by date, rotation, EPA, milestone, etc. to narrow your results. Be sure to click 'Apply Filters' to have your filters take effect. These filters will stay in place as you move from one tab to another, and even upon logout. Click 'Reset' to clear filter settings.

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Stages Tab

From the stages tab you can see a summary of your progress across EPAs and stages.



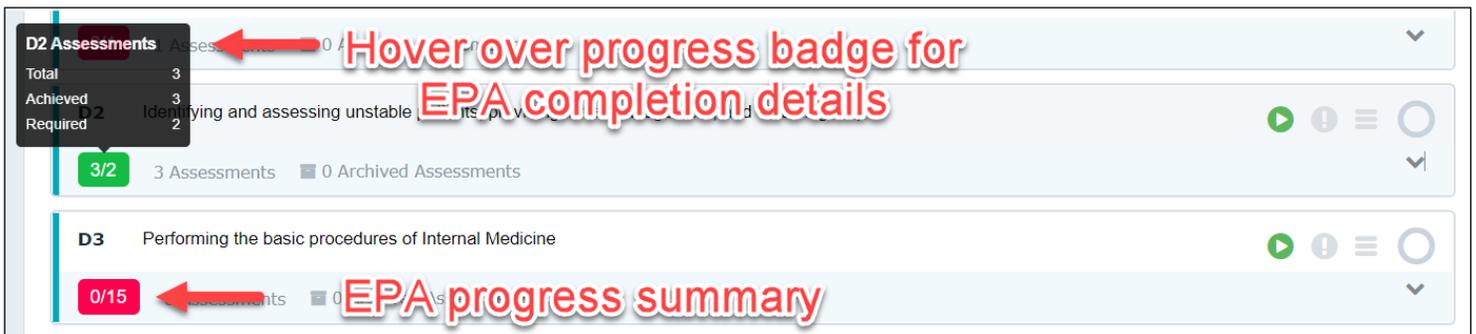
Aggregated EPA report

Each EPA tile can be expanded to view a report that aggregates information from all of your completed assessments for that EPA. (Individual assessments can be viewed in the “Assessments” tab.) If an EPA has part A, B or C forms they will each appear in a separate line. On the right side of the tile, you will see how many EPAs you have completed per O-score. You can click on each number to see an aggregate report for each o-score.



Progress badge (new to Entrada v1.19.1)

A badge on EPA cards displays your progress towards meeting assessment plan requirements in each program’s Specialty Committee EPA Guide. These numbers are updated on a nightly schedule.



The progress badge indicates generally how many completed EPA forms meet program requirements vs. the total number required. This should give you an indication of how many more EPA forms you have to complete. To be considered “achieved,” an EPA must meet the total number of required observations, the program-specific minimum o-score as well as any other assessment plan requirements.

Please note that in some cases granular “context variable” assessment requirements, such as clinical setting or case complexity, may not be captured in this total. For details on assessment plan requirements, residents should refer to the assessment plans in their EPA guides and updated communications from their program. **(Always consult your program the most current requirements as some UBC Competence Committees have made adjustments to EPA guide requirements.)**

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How “context variable” requirements are tallied in the dashboard progress badge:

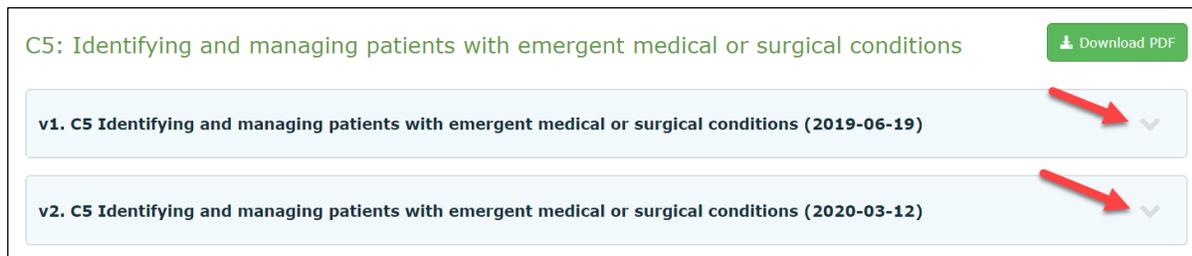
(Context variables are the clinical details included in each EPA. Examples include assessor role, basis of observation, clinical setting, etc.)

When a resident has successfully fulfilled the total required observations, but has not fulfilled one or more “context variables” requirements **the total achieved count sticks at one less than the total until all requirements are met.**

For example, if you have completed five of the total required observations, but all were indirect observations and your EPA guide requires a number of direct observations, your dashboard progress badge will read “4/5” until you complete the required direct observations. (The Competence Committee may also choose to wave certain requirements in light of other factors and mark the EPA as approved.)

Form versioning:

Please note that if edits have been made to your EPA forms during the course of your program, your aggregated EPA forms will appear in separate dropdown tiles after you open the “aggregated EPA report” shown above. In the few cases where the EPA title was changed from one form version to the next, each form version will appear in a separate line on the main dashboard. Be aware that your total completed EPAs listed on the dashboard (in the above case, two EPAs for D2), may be split between form version one and two. Click the down arrows (shown below) to expand each form version.



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Assessments Tab

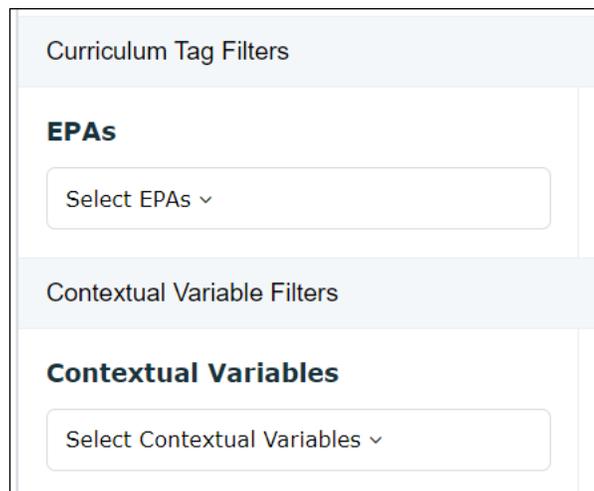


From the Assessments Tab, below the filter settings window, you will have the option to toggle between completed, in progress, pending and deleted assessments.



A pending EPA, is an assessment that has not be started, as opposed to “in progress” which is partially complete. For long-outstanding assessments in “pending” or “in progress” status, your program administrator can send reminder notices to the assessor. **Residents do not currently have the ability to trigger reminders through Entrada.**

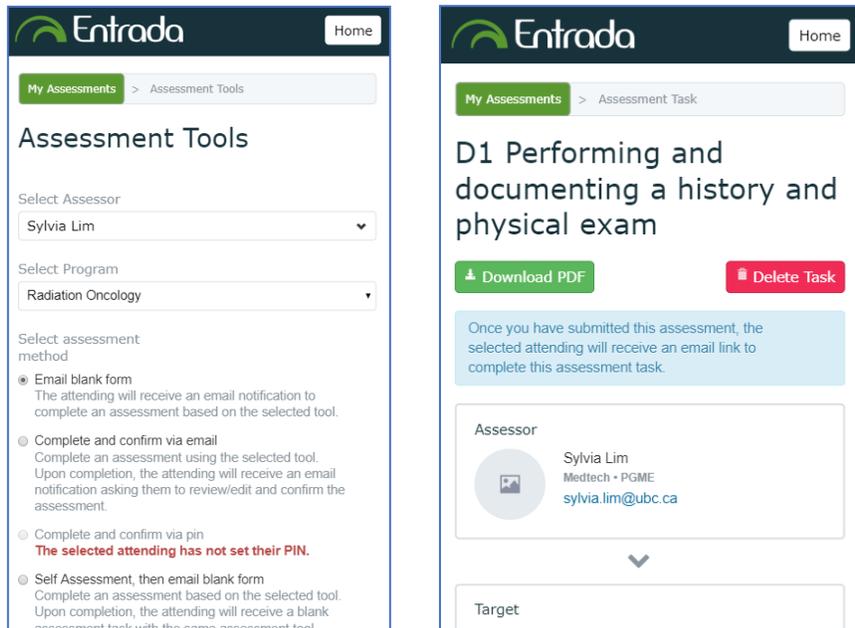
With the filter options in the Assessments tab, you can search for a specific assessor or date. You can also filter by EPA and Contextual Variable. If, for example, one of your EPAs includes a long list of procedures, this will allow you to view only those for a specific procedure.



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Mobile View

The Entrada webpage has responsive design, making it easier to complete assessment tasks on a mobile device.



NOTE on EPA Forms:

1. **Form 2 (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 your program for more details.**

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