

CBME in Entrada: Competence Committee User Guide

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

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

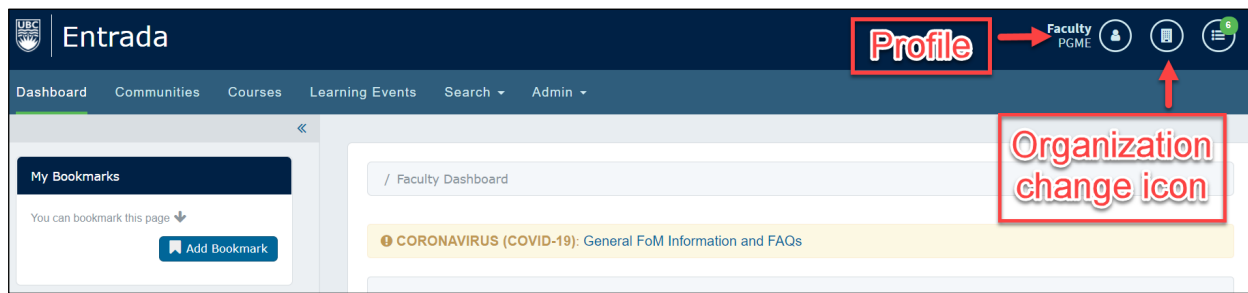
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For further training or support with program-specific concerns, please contact systems support with the PGME office at pgme.cbme@ubc.ca

Updated August 2021 (Entrada v.1.19.1)

1. Logging in to Entrada

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). Ensure you are logged into your PGME profile. If not, open the organization change icon (center), to switch to PGME.



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



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2. Viewing Resident Assessment Data: Program Dashboard

Navigate to the **Assessment & Evaluations** icon at the top right.



Then select the **My Learners** tab and the **Program Dashboard** will populate with all resident currently assigned to the program. (New program directors must be given a permissions update in Entrada for this program data to appear. Program Administrators can request this by contacting pgme.cbme@ubc.ca.)

CBME Program Dashboard

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

Anatomical Pathology | 2020-07-01 - 2021-06-30 | Anatomical Pathology

Search | Sort by Name | Ascending

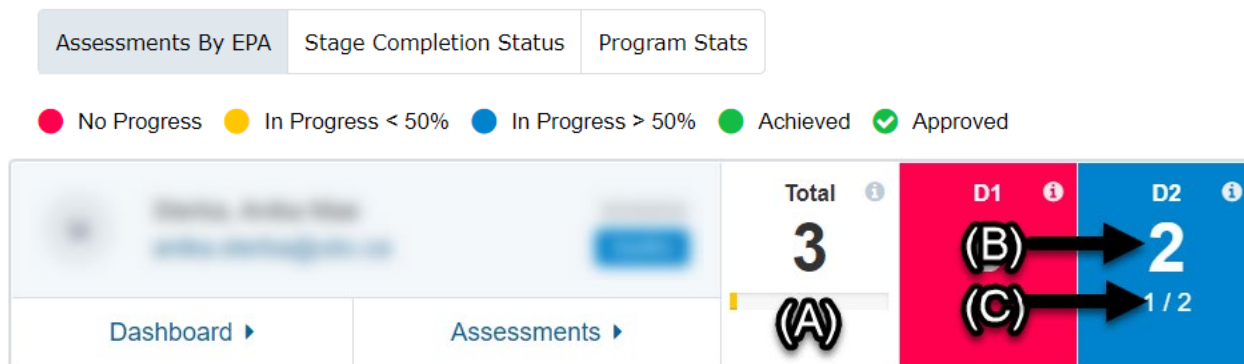
Data Filters

PGY | **Stage** | **EPAs**

Select PGYs | Select Stages | Select EPAs

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What do the numbers mean?

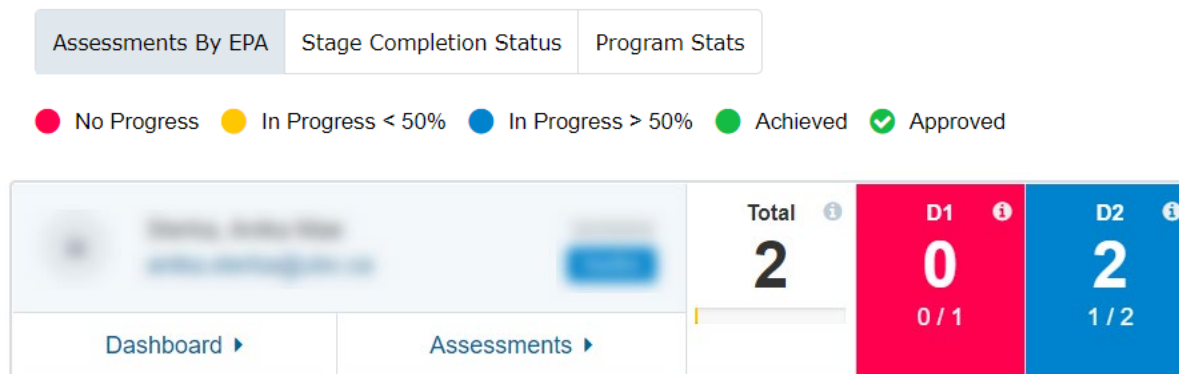
Overall EPA Total (A): Total number of assessments completed on the learner overall for EPAs that have an assessment plan entered.

EPA-Specific Total (B): The number directly beneath the EPA Code is the total number of assessments that have been completed on that specific EPA for that learner, regardless of whether or not they met the assessment plan requirements.

Requirements Total (C): The fraction indicates how many completed assessments met the assessment plan over how many assessments (observations) are required in the EPA guide from the Specialty Committee.

(Note: the assessment plans are built by the PGME office based on each program EPA guide. For requests to adjust these requirements or more details about the specifics into Entrada, please contact entradacbme.support@ubc.ca)

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What do the colors mean?

Red: No Progress. Indicates that the learner is in that stage, but:

has either not been assessed on that EPA, **OR**
has been assessed but none of the assessments meet the assessment plan requirements.

Yellow: In Progress < 50%. Indicates that the learner has been assessed on the EPA, but is currently meeting less than 50% of the requirements.

Blue: In Progress > 50%. Indicates that the learner has been assessed on the EPA and is meeting more than 50% of the requirements.

Green: Achieved. Indicates that the learner has been assessed on the EPA and is currently meeting the defined assessment plan numbers; however, the progress still needs to be reviewed and approved by the competence committee.

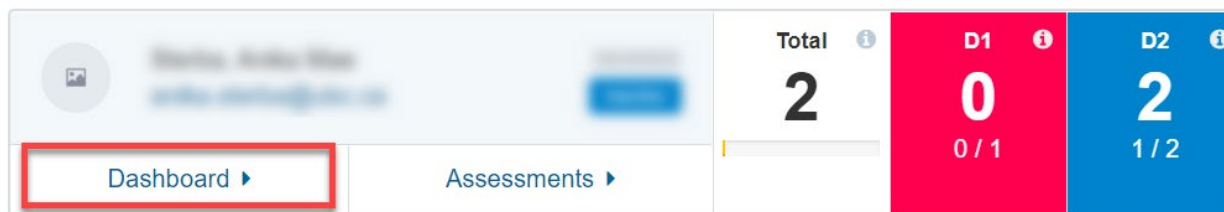
Green (with checkmark): Approved. Indicates that the EPA has been reviewed and approved at the competence committee level.

Grey: All EPAs that are not in the learner's current stage will appear grey, even if they have assessments that count towards the assessment plan.

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3. Viewing Resident Assessment Data: Resident Dashboards

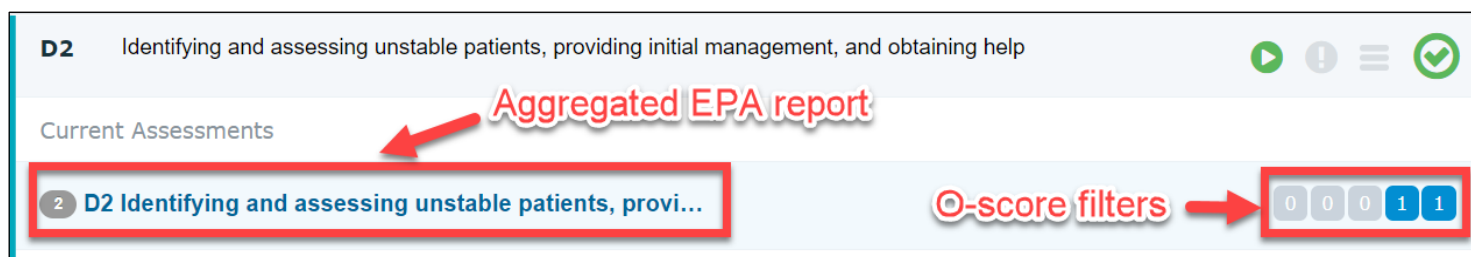
To view EPA completion details for each resident, select the **dashboard** tab underneath a resident profile.



Each resident dashboard will list EPA data by stage, completion status, milestones, or entrustment scale (O-Score) trend. This view represents the dashboard a resident sees when accessing their assessment data.

Aggregated EPA report

Each EPA tile can be expanded to view a report that aggregates information from all of the resident's 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 forms they have completed per O-score. You can click on each number to see an aggregate report for each o-score.



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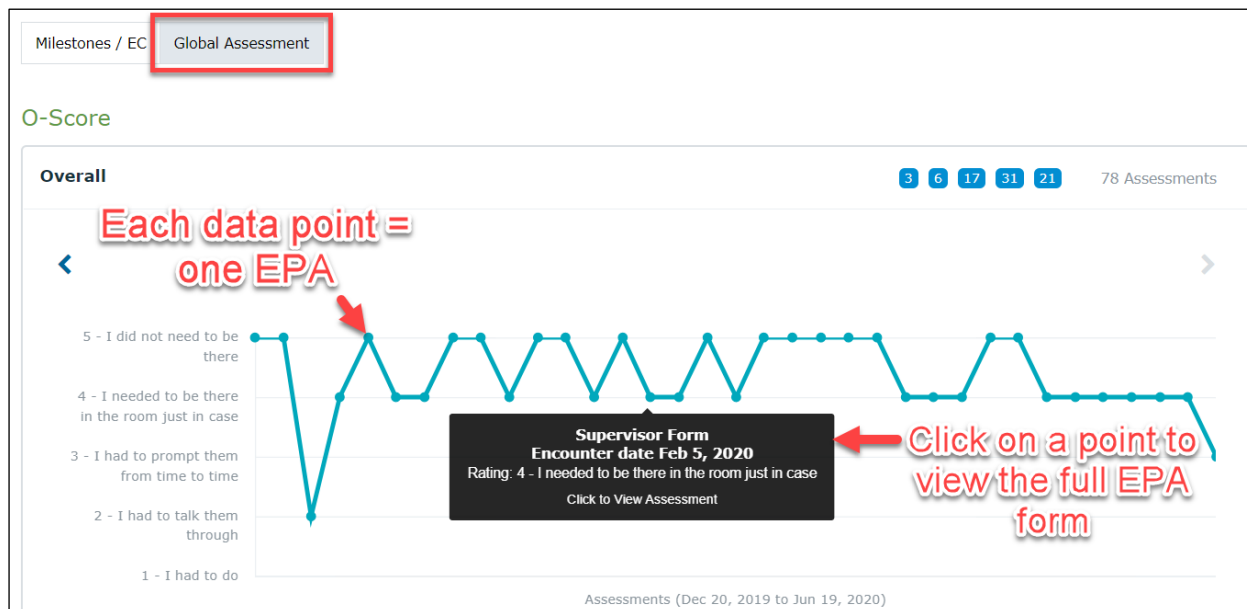
i. EPA Graphs: all completed EPAs per resident

From an individual resident's dashboard, click the **Trends** tab.

This option allows you to filter each resident's completed EPAs or Milestones. It will generate a graph to show the progression over time.

The screenshot shows the 'Trends' tab selected in a navigation bar. Below the navigation bar are filter options including a search field, a 'Select Assessor' dropdown, and 'Date Filters' with options for 'Date Range' and 'Rotation'. There are also 'Curriculum Tag Filters' at the bottom.

To view all EPAs in one graph, ensure no filters are applied and select the **Global Assessment** tab below the filter options. From this view, you can also access individual EPAs by clicking on an individual data point.



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ii. EPA Graphs: selected EPAs per resident

To search specific EPAs, select the dropdown and the EPA you wish to search. You can select multiple if desired. Click **Apply Filters**, then navigate to the **Global Assessment** tab below the filter options.

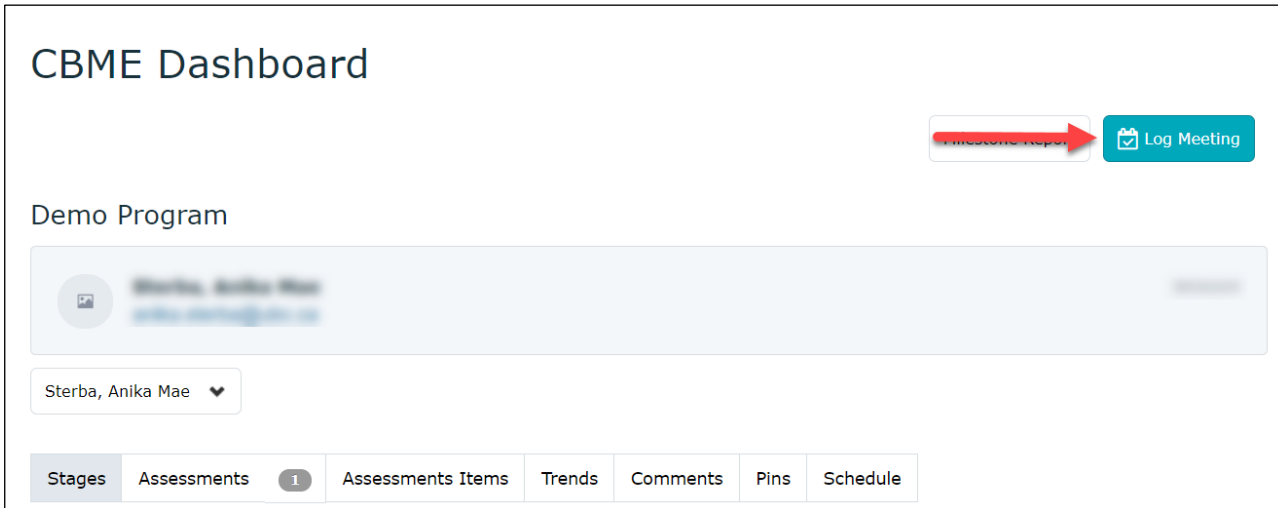
The screenshot displays the Entrada system's filter interface. On the left, the 'Curriculum Tag Filters' dropdown is highlighted with a red box. It contains a search bar with the text 'Begin typing to search...' and a list of checkboxes under the heading 'Filtering Items by Select EPAs'. The list includes 'Select All' and five specific EPAs: D1: Performing histories and physicals, D2: Identifying and assessing unstable patients, D3: Performing the basic procedures, F1: Assessing, diagnosing, and providing care, F2: Managing patients admitted to acute care, F3: Consulting specialists and other health professionals, F4: Formulating, communicating, and documenting the assessment, and F5: Assessing unstable patients, providing care, and consulting with other health professionals. To the right of this dropdown are several other filter sections: 'CanMEDs Roles' with a dropdown menu, 'Milestones' with a dropdown menu, 'Contextual Variable Responses' with a dropdown menu, 'Rating Scales' with a dropdown menu, 'Triggered By' with a dropdown menu, 'Sort Options' with radio buttons for 'Newest to Oldest' (selected) and 'Oldest to Newest', and 'Other Options' with radio buttons for 'Show All' (selected), 'Read', and 'Unread'. At the bottom right, a red arrow points to the 'Apply Filters' button. The interface also shows 'Filtered 80 of 80 total assessments' and a horizontal scrollbar at the bottom.

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4. Log meeting notes (upload non-EPA documentation)

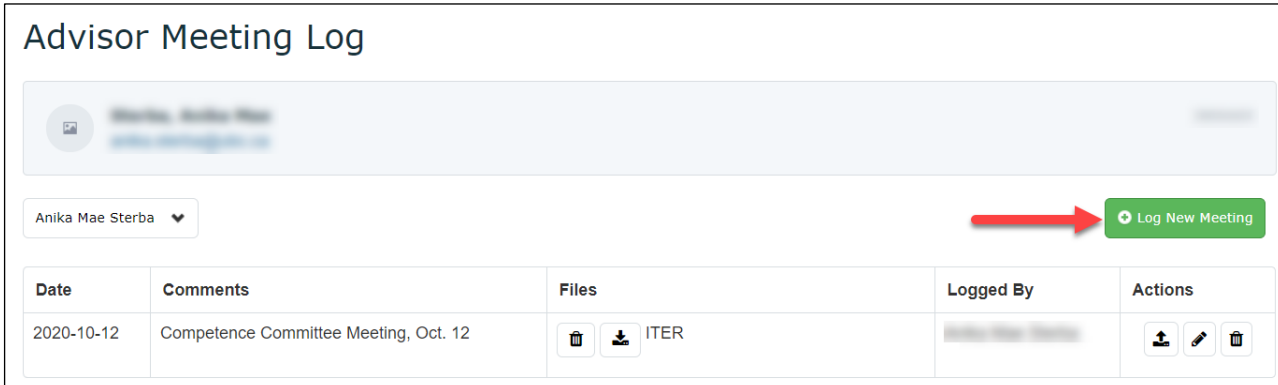
Faculty and program administrators can log meetings to maintain a record of conversations about learner progress. Residents have access to their own meeting logs from the CBME dashboard **My Meetings** button. In a residents' CBME dashboard you can select the option to log a meeting note to which you can attach other documents. This is a way of storing other assessments such as ITERS, or exam results within the system.

Note: Only faculty/CC members and PAs can add and edit meeting information. Learners have read only access to their meeting log.



The screenshot shows the 'CBME Dashboard' interface. At the top right, there is a 'Log Meeting' button with a calendar icon, which is highlighted by a red arrow. Below the dashboard header, there is a 'Demo Program' section with a user profile card for 'Sterba, Anika Mae'. At the bottom, there is a navigation menu with tabs for 'Stages', 'Assessments', 'Assessments Items', 'Trends', 'Comments', 'Pins', and 'Schedule'.

a. Click **Log New Meeting**.



The screenshot shows the 'Advisor Meeting Log' interface. At the top right, there is a 'Log New Meeting' button with a plus icon, which is highlighted by a red arrow. Below the header, there is a user profile card for 'Anika Mae Sterba'. Below that is a table with the following data:

Date	Comments	Files	Logged By	Actions
2020-10-12	Competence Committee Meeting, Oct. 12	ITER		

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b. Select **date**, add **comments** if needed, and then **create meeting**.

/ My Assessments / My Meetings / Add New Meeting

Add Meeting with






Please note that you will be able to upload files to the meeting after you have created it.

Date of Meeting *  ←

Comments ←

→

c. Once the log is created, use the action options to **upload files**, **edit** or **delete**.

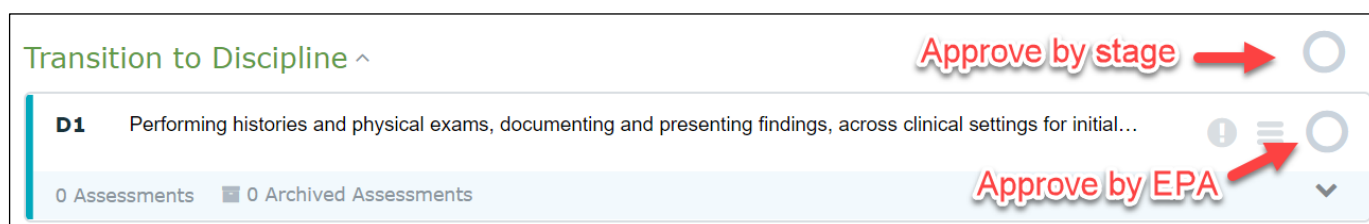
Date	Comments	Files	Logged By	Actions
2020-10-12	Competence Committee Meeting, Oct. 12	  ITER		  

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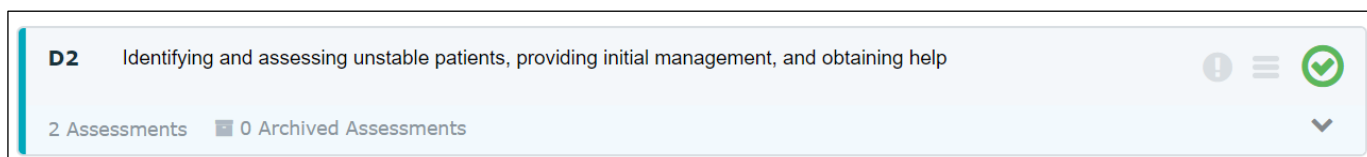
5. Promoting residents (approving EPAs)

Note: Both PAs and Competency Committee Members have the ability to access all resident profiles and to promote learners by EPA or by stage of training. Deciding who is responsible for marking EPAs as approved should be determined at the program level.

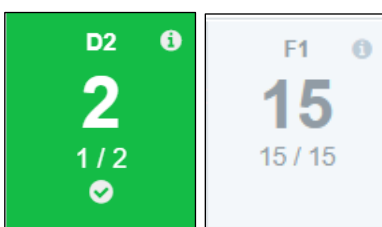
- In the residents' CBME dashboard, select the grey circles to mark an EPA as achieved and approved by the Competence Committee. A pop-up dialogue will appear to confirm the EPA as completed.
- To approve a learner's entire stage of training, follow a similar process but click the grey circle beside the stage title, above the list of EPAs.



View of approved EPA on the resident dashboard:



View of approved EPA on the program dashboard:



- The EPA tiles on the main program dashboard will only appear color-coded for a resident's current stage of training. **In order for the next stage of training to appear color-coded, all of the EPAs in the previous stage must be approved using the feature described above.** For example, a resident's Foundations EPAs will appear greyed out (as with the F1 example above) until *all* of the Transition to Discipline EPAs have been approved.

FORM NOTES:

1. The Narrative Form is called a Field Note Form in Entrada.
2. MSF: Form 3 (MSF) forms are not available yet on Entrada due to limitations with assessor confidentiality. In the interim, schools across the country and other UBC programs have been using paper forms or surveys such as Qualtrics. Once the survey is created, the learner can send the link to the assessor, or the learner can hand the assessor a paper form for completion.