Completing EPA Assessments & Triggering on MedSIS

An illustrated, step-by-step, guide for faculty members.

Updated: February 27, 2022

Assessing Entrustable Professional Activities (EPAs)

Assessments may involve direct or indirect observation depending on variables such as the task at hand, patient complexity, your comfort level, and resident skill.

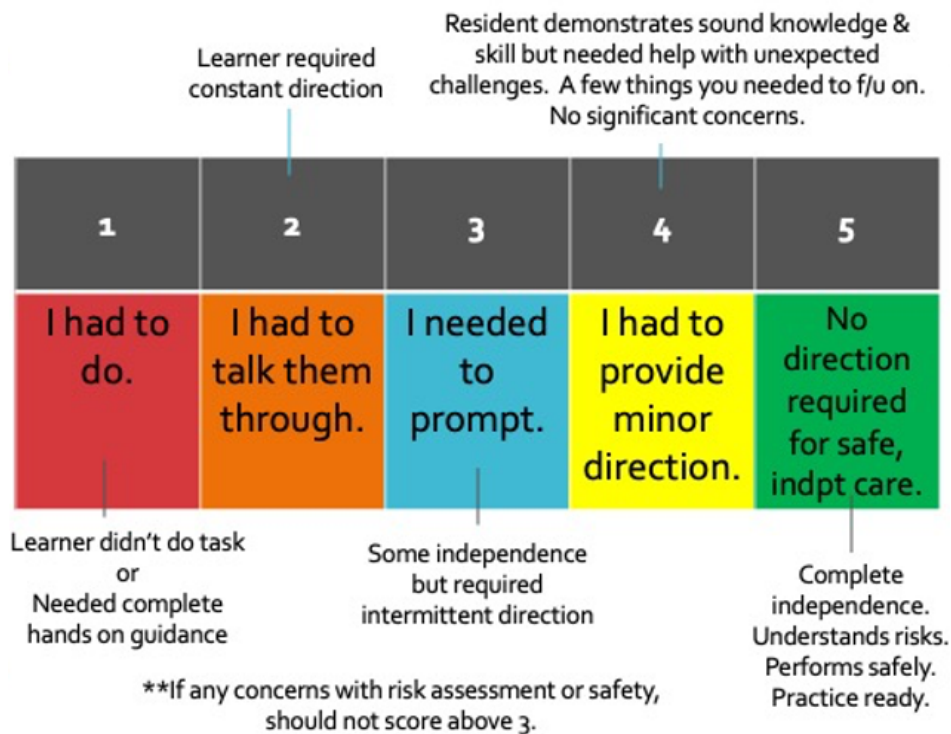Assessments should be followed by:
- In the moment, face to face verbal feedback
- Completion of the written, electronic EPA Assessment form

When an EPA opportunity is identified in advance of the resident doing the clinical task, please discuss with the resident:
- The EPA
- Reminders of key elements of the task
- Any feedback previously given, on which they might be working

The resident should be assessed on their EPA performance using the descriptors on the **Entrustment Scale:**

Learner required constant direction

Resident demonstrates sound knowledge & skill but needed help with unexpected challenges. A few things you needed to f/u on. No significant concerns.

1	2	3	4	5
I had to do.	I had to talk them through.	I needed to prompt.	I had to provide minor direction.	No direction required for safe, indpt care.

Learner didn't do task or Needed complete hands on guidance

Some independence but required intermittent direction

Complete independence. Understands risks. Performs safely. Practice ready.

**If any concerns with risk assessment or safety, should not score above 3.

**EPA Assessment Forms should be completed even if completion of the task was rated less than a 4 or 5, to foster feedback and promote knowledge & skill development.

Below is an example of the form on which EPA assessments are documented.
These are accessed via MedSIS, triggered by the resident or by you. MedSIS details in Appendix B.

Foundations of Discipline - Risk Assessment

Learner: _____, _____
Learning Program: _____
EPA Title: _____
Key Features: _____
EPA Stage: _____
Date Of Observation: _____

Contextual Variables

Patient history	--Select--
Observer role	--Select--
Setting	--Select--
Demographic	--Select--
Additional Context Information:	

Entrustment Scale →

I had to do	I had to talk them through	I needed to prompt	I had to provide minor direction	I did not need to provide direction for safe and independent care
1	2	3	4	5

Based on this observation overall :   ○   ○   ○   ○   ○

Milestones associated with this EPA:

	Not Observed	In Progress	Achieved
	1	2	3
Manage the flow of challenging patient encounters	○	○	○
Identify patients requiring handover to other physicians or health care professionals	○	○	○
Apply knowledge of the relevant codes, policies, standards, and laws governing physicians and the profession, including relevant mental health legislation	○	○	○
Recognize and manage one's own reaction to patients	○	○	○
Develop and implement an acute safety management plan	○	○	○
Provide a clinically relevant summary to the receiving physician or care team	○	○	○
Assess risk factors for violence, suicide, and self-harm, including modifiable and non-modifiable factors	○	○	○

Milestones to be used as a guide

Feedback to Resident and Competence Committee:

Please provide 1 – 2 specific, actionable recommendations for knowledge &/or skill development.

4000 characters remaining

Remember! The most important part of the EPA is the **Feedback Section**
  Elements of **feedback** should include:
  - Identify 1 -2 specific areas for development with concrete examples
  - Outline specific strategies for the resident to improve those areas for development
  - Explain reasoning for score on Entrustment Scale
  - Explain what would increase their Entrustment Score to the next number

! EPA Evaluations expire after 14 days,
after which resident loses opportunity for that observation to "count"
Thank you for completing EPA Evals on time.

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Appendix B: Triggering Evals

Remember – Evals expire after 14 days

FIRST: Decide with the resident, which of you is going to trigger the EPA Eval form on MedSIS.

- If the resident "triggers" it on MedSIS, you will receive an email with a link to the eval

OR

- Residents can fill it in with the details agreed upon by you. You will get a one factor authentication to confirm your agreement with the eval.

<u>OR</u>

- You as the supervisor can trigger and complete the eval, following the steps below:

STEPS FOR FACULTY TO TRIGGER EPA EVAL ON MEDSIS:

Step 1: Click Login to MedSIS using MacID.
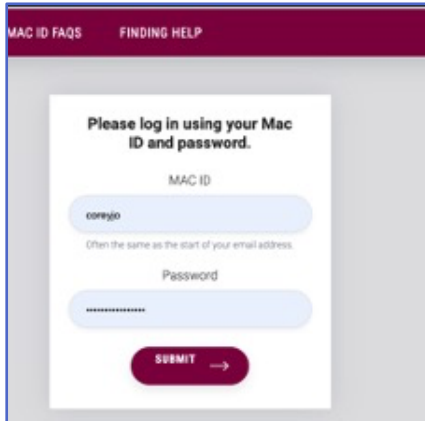
Link to MedSIS Log-On Page:
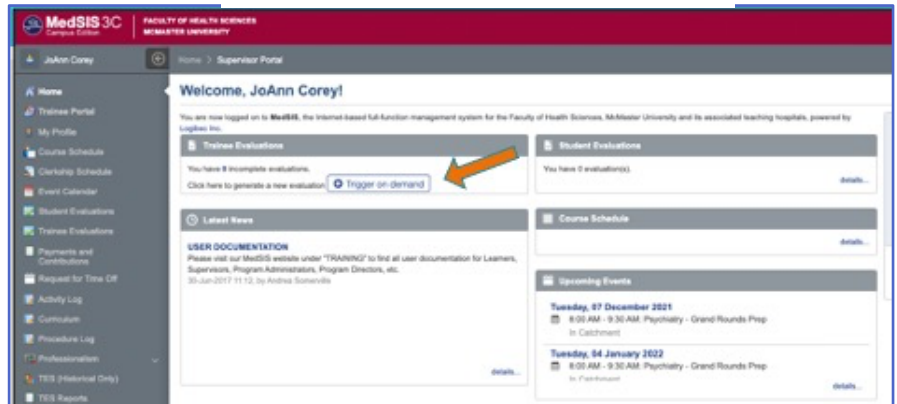
https://medsis.mcmaster.ca/medsis/index.cfm/Authentication:Main/index

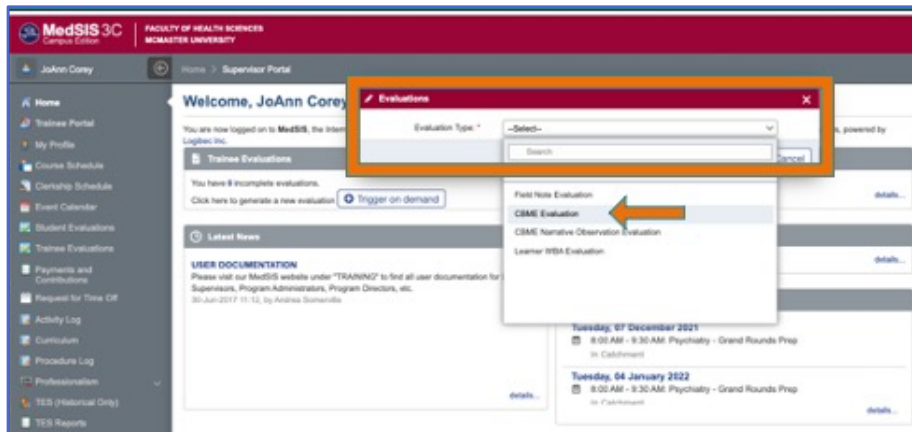### Step 2: Log-on to MedSIS using your McMaster ID

If you need assistance with log-on id, contact Cheyenne @creid@mcmaster.ca
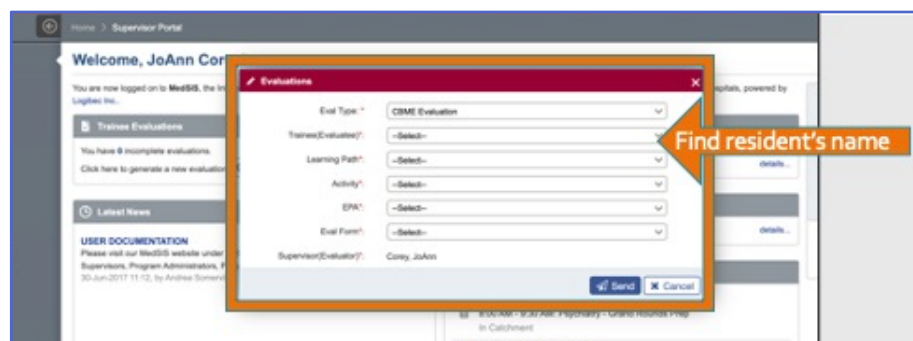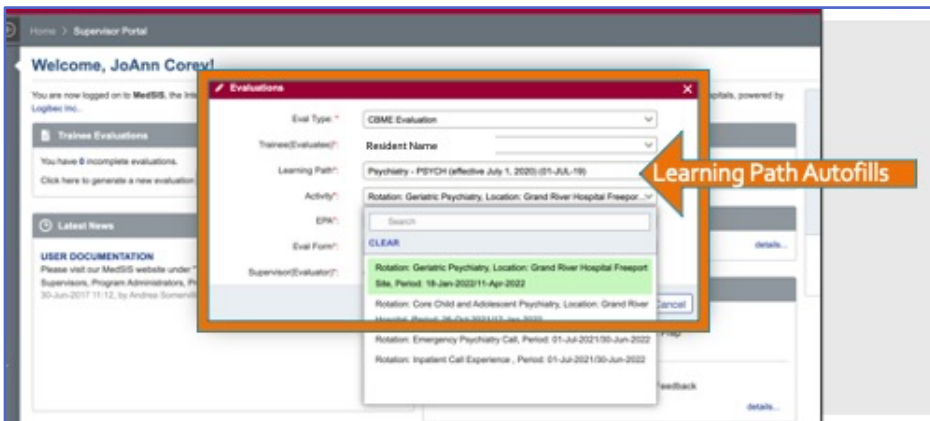

Step 3: Click "Trigger on Demand"

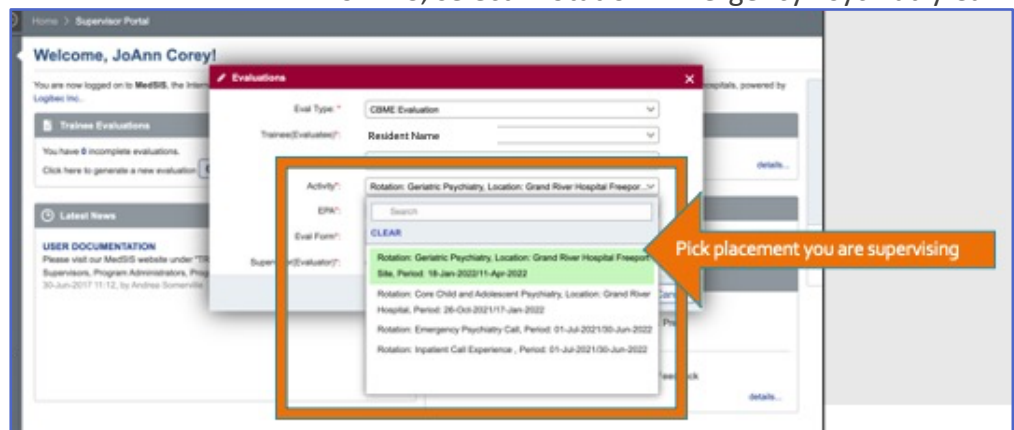### Step 4: From Drop-Down of Evaluation Types, Select "CBME Evaluation"

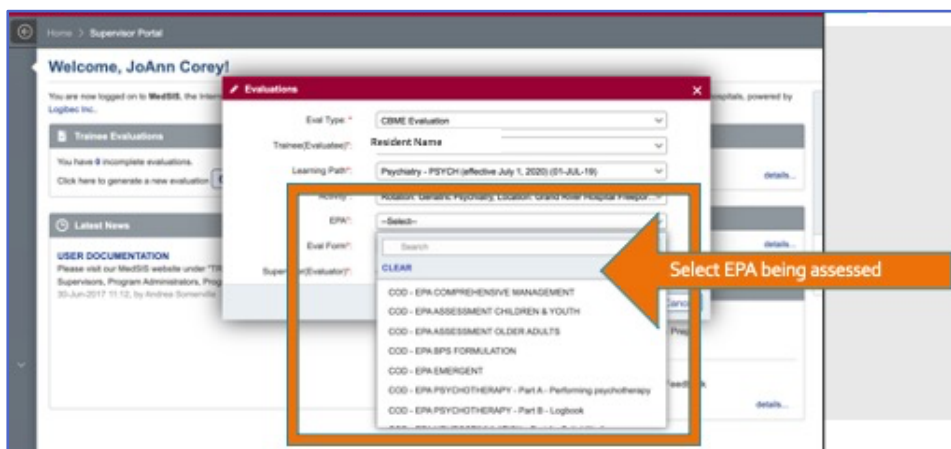### Step 5: Select Resident's Name

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Step 6: The next drop down, the Learning Path, will autofill the current academic year

Step 7: In the "Activity" drop-down, select the rotation on which you are supervising.
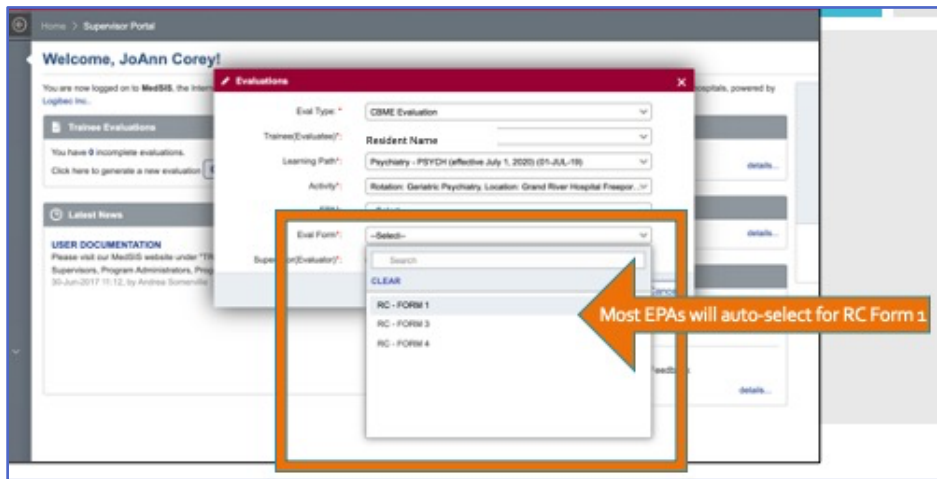*for PES, select "Rotation: Emergency Psychiatry Call"*

Step 8: From the "EPA" drop-down, select the EPA you are assessing.
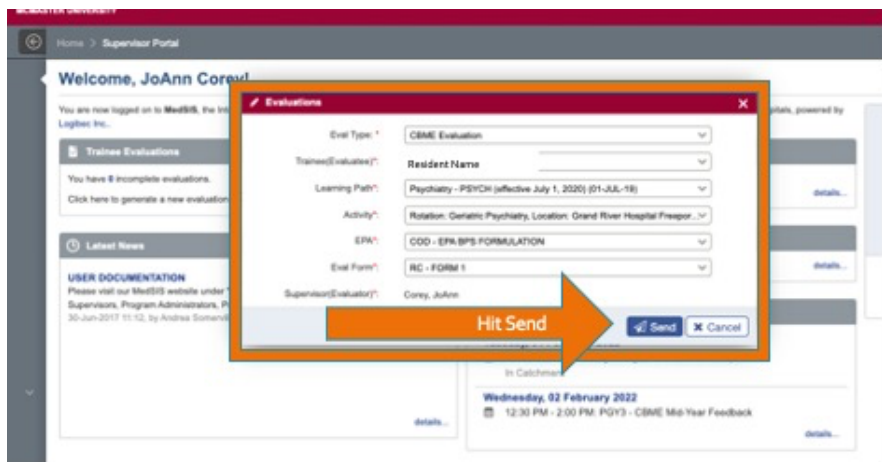

Note:
The EPAs are labelled by stage.

TTD = Transition to Discipline
FOD = Foundations of Discipline
COD = Core of Discipline
TTP = Transition to Practice

Step 9: For the "Eval Form" drop-down, most EPAs will auto-select the correct eval form required.

Step 10: Click "Send". The evaluation form will then come up for you to complete.

For MedSIS Instructions for use on Mobile Devices:
https://healthsci.mcmaster.ca/medsis/training/cbme

For additional MedSIS Instructions to Trigger an EPA Assessment on Desktops:
https://healthsci.mcmaster.ca/docs/librariesprovider30/training/pgme/students/how-to---trigger-on-demand-evalautions.pdf?sfvrsn=6667a62_2

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