

How to view a Learner's dashboard and progress

Audience: Learner, Program Admin, Program Director,
Competence Committee Members, Academic Advisors

The learner dashboard displays their progress. You can find it by clicking on their learning path. The learning path is the resident's EPA Suite. A resident may be enrolled in more than one learning path (for example a core surgical discipline and Surgical Foundations).

A] Open the Learning path

»» For Resident/Learner

Click on the **Learning Path** menu then on the name of your **Learning Path**



The screenshot shows the Learner Portal interface. On the left is a dark sidebar menu with the following items: Home, Supervisor Portal, Learning Path (highlighted with an orange arrow), Procedure Log, Course/Rotation Schedule, Evaluations, Event Calendar, and News. The main content area has a breadcrumb trail: Home > Learner Portal > Learning Path. Below this is a learner profile for Chris Cartest, with a placeholder photo, Unique ID: 55178, Student #: 55178, and PGY5, PGME, Emergency Medicine, 01-Jul-2024 / 30-Jun-2025. There are three buttons: Registered (green), Active (grey), and New Trainee (grey). Below the profile is a 'Learning Path' section with a list of paths. The first path is 'Emergency Medicine - Emergency Medicine 2024 (01-Jul-2021) Official', which is highlighted with a blue bar and an orange arrow. Below this path is a 'Stage' section with four stages: Stage 1 - Transition to Discipline, Stage 2 - Foundations of Discipline, Stage 3 - Core of Discipline (with a 'CURRENT' button and an orange arrow), and Stage 4 - Transition to Practice.



»» For Academic Coach and Competence Committee Members

Click on **Learner Curriculum** then click on the Learner name

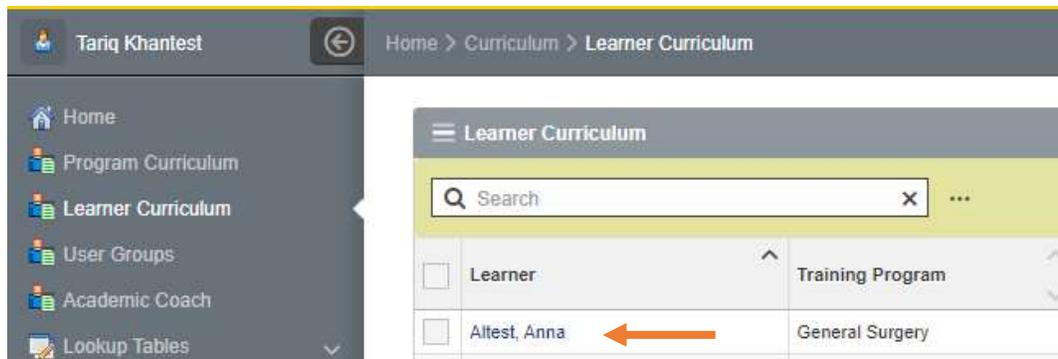
The screenshot shows a web interface for 'Chris Cartest' with a breadcrumb trail: Home > Supervisor Portal > Curriculum. A left-hand navigation menu includes: Home, Learner Portal, Event Calendar, Learner Evaluations, Learner Curriculum (highlighted with an orange arrow), Procedure Log, and News. The main content area is titled 'Learner Curriculum' and features a search bar. Below the search bar is a table with two columns: 'Learner' and 'Training Program'. The table contains two entries: 'James, Motest' (highlighted with an orange arrow) and 'Martest, Andi', both associated with 'Emergency Medicine'. At the bottom of the table, it indicates 'Showing 1 to 2 of 2 entries' and a 'Show 25 entries' dropdown.

Learner	Training Program
<input type="checkbox"/> James, Motest	Emergency Medicine
<input type="checkbox"/> Martest, Andi	Emergency Medicine



»» For PA/PD/CC Chair

Click on **Curriculum** tile or menu then **Learner Curriculum** then click on the Learner name





B] Dashboard tabs description

Dashboard Overview

Emergency Medicine - Emergency Medicine 2024

Learner: Lintest, Ashley
Start Date: 01-Jul-2023
Current Stage: Stage 2 - Foundations of Discipline

EPAa Supporting Documentation Reflection Documentation Assessments Program Evaluations Events Procedures Summary Report Review Dashboard

--All Data--

Search: [] x

EPAs	Program Assessment	Individual Assessment	# of Forms	Level of Supervision/Entrustment	Status	Comments
> Stage 1 - Transition to Discipline [Emergency Medicine 2024]	0%				✔ Achieved	
✔ Stage 2 - Foundations of Discipline / 01-Jul-2024 [Emergency Medicine 2024]	61%				⊙ In Progress	
> EPA 1. RESUSCITATION	100%		14	0 1 2 3 8	✔ Achieved	+ 1 Note
> EPA 2. UNCOMPLICATED URGENT AND NON	4%		2	0 0 1 0 1	⊙ In Progress	+ 1 Note
> EPA 3. TEAM	40%		4	0 0 0 2 2	⊙ In Progress	+ Add note
> EPA 4. SA APPRAISAL	100%		4	1 0	⊙ Ready for Review	+ Add note
> Stage 3 - Core of Discipline [Emergency Medicine 2024]	2%				⊙ In Progress	
> Stage 4 - Transition to Practice [Emergency Medicine 2024]	0%				⊙ Pending	

Stages completed before MedSIS launch will appear at 0% but will be marked as Achieved.

Tab descriptions:



Details: Used to officially update learner stage, status, and start/end dates of learning path (not visible for Learners)

EPAs: EPA descriptions, requirements, progress. EPA and Stage achievement Status

Supporting Documentation: upload documents – both general and EPA-related

Reflection Documentation: personal documents. Can be private or public (visible by assigned PA, PD, CC members, Academic Coach)

Assessments: can be filtered (for example by date, rotation, type)

Program Evaluations: summary of program evaluations (evaluations of preceptors and rotations) requested and filled (2024/2025: not implemented yet)

Events: Resident event list with attendance

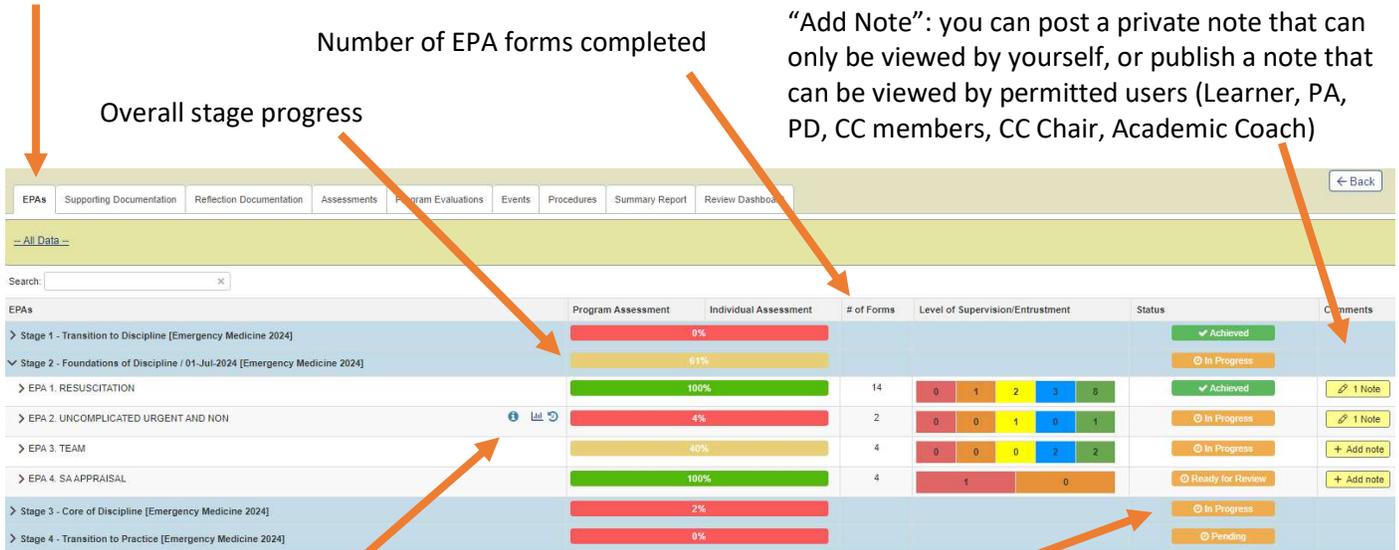
Procedures: procedure log (can be filtered by procedure, EPA etc)

Summary Report: can be filtered by date, stage, EPA and other criteria

Review Dashboard: Competence Committee documents and recommendations

B] EPA Tab

»» The Dashboard is automatically updated when EPAs forms are submitted.



Overall stage progress

Number of EPA forms completed

“Add Note”: you can post a private note that can only be viewed by yourself, or publish a note that can be viewed by permitted users (Learner, PA, PD, CC members, CC Chair, Academic Coach)

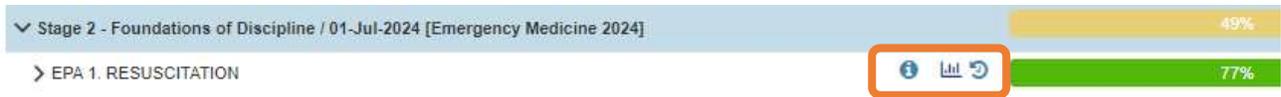
EPAs	Program Assessment	Individual Assessment	# of Forms	Level of Supervision/Entrustment	Status	Comments
> Stage 1 - Transition to Discipline [Emergency Medicine 2024]	0%				✓ Achieved	
✓ Stage 2 - Foundations of Discipline / 01-Jul-2024 [Emergency Medicine 2024]	61%				🔄 In Progress	
> EPA 1. RESUSCITATION	100%		14	0 1 2 3 8	✓ Achieved	📝 1 Note
> EPA 2. UNCOMPLICATED URGENT AND NON	4%		2	0 0 1 0 1	🔄 In Progress	📝 1 Note
> EPA 3. TEAM	40%		4	0 0 0 2 2	🔄 In Progress	+ Add note
> EPA 4. SA APPRAISAL	100%		4	1 0	📄 Ready for Review	+ Add note
> Stage 3 - Core of Discipline [Emergency Medicine 2024]	2%				🔄 In Progress	
> Stage 4 - Transition to Practice [Emergency Medicine 2024]	0%				⏸ Pending	

EPA details and progress status (see details below)

Status of the EPA and stages
Pending = no forms have been completed,
In Progress = at least one form has been completed for the Stage or EPA,
Ready to Review = the minimum requirements have been met

C] EPA details

»» Hover the mouse over the EPA to see 3 new icons:



Stage 2 - Foundations of Discipline / 01-Jul-2024 [Emergency Medicine 2024] 49%

> EPA 1. RESUSCITATION 77%

-  EPA description
-  Additional information on the milestones progress and assessment forms
-  History log



Click on "All Data" to filter EPAs as needed (eg. by date range (review period) or contextual variables)

D] Supporting documentation

» You can upload documentation. It will be visible to those with access rights to their profile (PA, PD, CC Chair, CC Members, Academic Coach)

Categories	Description	CanMEDS Role	Curriculum Item	Files	Last Updated
Teaching evals	Evaluation Report from August 2024	Professional		EvaluationsExport (11).xls	Lintest, Ashley in 11-Sep-2024 at 18:4



E] Reflection Documentation

»» Learners can upload documents and choose to keep them private or make them visible to those with access rights to their profile (PA, PD, CC Chair, CC Members, Academic Coach)

Current Stage: Stage 2 - Foundations of Discipline

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EPAs Supporting Documentation **Reflection Documentation** Assessments Program Evaluations Events Procedures Summary Rep >

File:

CanMEDS Role: --Select--

Curriculum Item: --Select--

Short Description*:

Reflection Description:

Private: NO ←

Save Cancel



F] Assessments Tab

- »» List the learner’s assessments and their completion status.
- Click on “All Evaluations” to filter the results
- Click on the up and down arrow by the column name to sort them
- Click on the 3 dot to export and print evaluations

The screenshot shows the 'Assessments' tab in a software interface. At the top, there are navigation tabs: Details, EPAs, User Groups, Supporting Documentation, Reflection Documentation, **Assessments**, Program Evaluations, Events, Procedures, Summary Report, and Review Dashboard. Below these is a sub-tab for 'Evaluations' with a dropdown menu showing 'All Evaluations' (highlighted with a red arrow) and a three-dot menu icon (highlighted with a red arrow). A legend below the sub-tab indicates: Template Record (blue), Hidden Evaluation (orange), and Hidden Template (green). The main table is titled 'CBME Evaluation' and has a 'Total: 20' indicator. The table columns are: Activity, Start Date, End Date, Evaluation, Trigger, Source, Created By, Evaluator, Evaluatee, Alerts, Status, and Action. Three rows are visible:

Activity	Start Date	End Date	Evaluation	Trigger	Source	Created By	Evaluator	Evaluatee	Alerts	Status	Action
Fetal Cardiology and Advanced Imaging	27-Aug-2024	21-Sep-2024	RC - FORM 1 Q ANTEPARTUM ASSESSMENT	Start of Rotation 19-Sep-2024	On-Demand	Acetest, Paul 15-Sep-2024	Lintest, Ashley	Acetest, Paul		In Progress	
Fetal Cardiology and Advanced Imaging	27-Aug-2024	21-Sep-2024	RC - FORM 2 Q PERFORM SURGICAL PROCEDURES	Start of Rotation 16-Sep-2024	On-Demand	Acetest, Paul 16-Sep-2024	Lintest, Ashley	Acetest, Paul		In Progress	
Fetal Cardiology and Advanced Imaging	27-Aug-2024	21-Sep-2024	RC - FORM 1 Q ASSESS COMMON CONDITIONS	Start of Rotation 15-Sep-2024	On-Demand	Acetest, Paul 15-Sep-2024	Lintest, Ashley	Acetest, Paul		Completed	View

G] Program Evaluation

- »» List of program evaluations, for example evaluations of preceptors or rotations (not implemented in fall 2024)

The screenshot shows the 'Program Evaluations' section. At the top, it displays 'Maternal-Fetal Medicine - Maternal-Fetal Medicine 2024'. Below this, it shows 'Learner: Acetest, Paul', 'Start Date: 01-Jul-2024', and 'Current Stage: Stage 2 - Foundations of Discipline'. The navigation tabs at the top include: Details, EPAs, User Groups, Supporting Documentation, Reflection Documentation, Assessments, **Program Evaluations**, Events, Procedures, Summary Report, and Review Dashboard. Below the tabs is a search bar with the text 'Search:' and a search button. The results area shows 'No results found' and a 'Total: 0' indicator.



E] Events

List of events for which the learner is registered, along with their attendance status.

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EPAs Supporting Documentation Reflection Documentation Assessments Program Evaluations **Events** Procedures Summary Report Review Dashboard

Event Attendance
Absent: 1 Exempted: 0 Present: 1 Sessions Presented: 0

Q Search X ...

Events Total: 3

Export

<input type="checkbox"/>	Event Program	Base Location	Event	Event Template	Topic	Event Type	Event Date	Time From	Time To	Participant Status	Attendance Status
<input type="checkbox"/>	Emergency Medicine	N/A	AHD EM	AHD EM	N/A	CBL/PBL	27-Aug-2024	08:00AM	09:00AM	Participant	Absent
<input type="checkbox"/>	Emergency Medicine	N/A	Journal Club	AHD HD	N/A	CBL/PBL	25-Aug-2024	08:00AM	09:00AM	Participant	Present
<input type="checkbox"/>	General Surgery	N/A	AHD General Surgery	AHD General Surgery	N/A	CBL/PBL	29-Aug-2024	08:00AM	09:00AM	Participant	N/A

Showing 1 to 3 of 3 entries Show 25 entries First Previous 1 Next Last

F] Procedures

Displays the procedure logs completed by the Learner. Note: Supervisors do not have access to view or review these logs. A "Submitted" status indicates that the logs are no longer in draft form.

Click on "All Procedures" to filter it by EPA, rotation, names, categories ...

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Details EPAs Supporting Documentation Reflection Documentation Assessments Program Evaluations Events **Procedures** Summary Report Review Dashboard

Procedure Dashboard

All Procedures ← Export Procedures Export Procedure Form Details

Procedure Log Total: 2

<input type="checkbox"/>	Procedure Name	Category Name	Procedure Program	Activity	Start Date	End Date	Evaluation	Trigger	Created By	Supervisor	Evaluatee	Status	Action	Expiry Date
<input type="checkbox"/>	ankle block	Core 11 – Peripheral Nerve Block	Anesthesiology	Obstetrical Anesthesia-Calgary	26-Aug-2024	22-Sep-2024	Anesthesia Procedure Log Q	Start of Rotation	Aarontest, Lea 11-Sep-2024		Aarontest, Lea	Submitted 11-Sep-2024	View	
<input type="checkbox"/>	transversus abdominis plane block	Core 11 – Peripheral Nerve Block	Anesthesiology	Adult Anesthesia-Calgary	29-Jul-2024	25-Aug-2024	Anesthesia Procedure Log Q	Start of Rotation	Aarontest, Lea 11-Sep-2024		Aarontest, Lea	Submitted 11-Sep-2024	View	

Showing 1 to 2 of 2 entries Show 15 entries First Previous 1 Next Last



G] Summary Report

» Select items to be displayed on the report. You can select by data range, stages, EPA details, Attendance ...
Click on Generate to populate a pdf report

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EPAs Supporting Documentation Reflection Documentation Assessments Program Evaluations Events Procedures **Summary Report** Review Dashboard

Summary Report Settings

Start Date:

End Date:

Stage: Stage 1 - Transition to Discipline Stage 2 - Foundations of Discipline Stage 3 - Core of Discipline
 Stage 4 - Transition to Practice

EPA: Summary Milestones Contextual Variables Comments Notes

Narrative:

ITERS/WBAs:

Procedures:

Attendance:



[Generate](#) [Clear](#)



Learner Summary Report

Learner: Lintest, Ashley
Program: Emergency Medicine
Learning Plan Version: Emergency Medicine 2024
Level: PGY2
Academic Coach: Graytest, John
Date Range: July 01, 2023 - Current

Stage 2 - Foundations of Discipline

Duration of Stage: July 01, 2024 - Current
Stage Progress: 81%
Stage Status: In Progress

EPA 1. RESUSCITATION - Initiating and assisting in resuscitation of critically ill patients

Table with 5 columns: Form, Completion, # of Forms, Breakdown, Status. Includes milestones and level of supervision/entrustment data.

EPA 1. RESUSCITATION - Initiating and assisting in resuscitation of critically ill patients

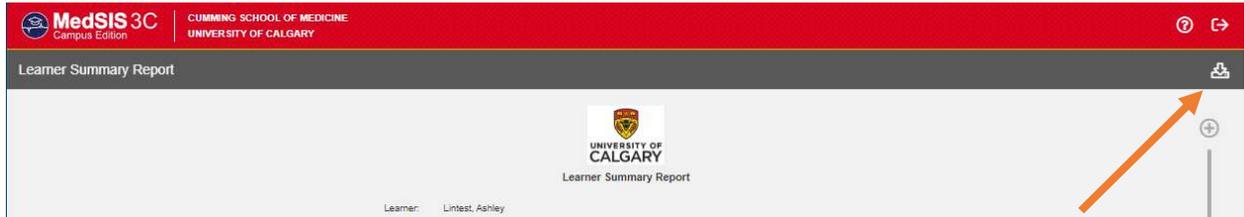
Table with 5 columns: Form, Completion, # of Forms, Breakdown, Status. Includes milestone information.

EPA 2. UNCOMPLICATED URGENT AND NON - Assessing and managing patients with uncomplicated urgent and non-urgent emergency department presentations

Table with 5 columns: Form, Completion, # of Forms, Breakdown, Status. Includes milestones and level of supervision/entrustment data.



Click on the download button to export a pdf file



H] Review Dashboard

Displays Competence Committee Meetings documents and recommendations.

- 1 Displays documents related to a given Competence Committee Meeting
 - A. Requirement column opens dialogue box that enables you to download template and upload document (blue if user has permission to upload)
 - B. Indicates who is responsible for completing document
 - C. Link to Download blank template
 - D. Uploaded completed document(s)
 - E. Step complete (= files are final/ ready for review)

2 Displays Competence Committee recommendations

See QRG about Competence Committee for more details

The screenshot shows the 'Review Dashboard' interface. At the top, there are navigation tabs: Details, EPA, Supporting Documentation, Reflecton Documentation, Assessments, Program Evaluations, Events, Procedures, Summary Report, and Review Dashboard (which is selected). Below the tabs is a search bar and a '+ Add Requirement' button. The main area contains a table with columns: Sequence #, Requirement, Responsible for Requirement, Template Files, Files, Due Date, Step Complete, and Last Updated. The table lists 8 requirements, with the first one highlighted by a blue circle and labeled '1'. Below the table, there is a detailed view of a meeting, with a blue circle and '2' next to the 'Overall Status' dropdown menu. The meeting details include Meeting Date (12-Jun-2024), Date Decision Rendered (01-Aug-2024), Overall Status (Progressing as expected), Purpose of Meeting (Decision to Promote), Outcome of Meeting (Promote to Next Stage), Promotion (Promotion to Foundations), and Comments (Great resident to work with).