

# MedSIS Training For PA/PD/CC Chair For Fall 2024 Session 1

**The University of Calgary, located in the heart of Southern Alberta, both acknowledges and pays tribute to the traditional territories of the peoples of Treaty 7, which include the Blackfoot Confederacy (comprised of the Siksika, the Piikani, and the Kainai First Nations), the Tsuut'ina First Nation, and the Stoney Nakoda (including Chiniki, Bearspaw, and Goodstoney First Nations). The City of Calgary is also home to the Métis Nation of Alberta (Districts 5 and 6).**



# Training Agenda

- Session 1
  - Brief overview of what your residents will see
  - Brief overview of what your preceptors will see
  - Orientation to your landing page
  - Training on the Curriculum Module, including:
    - Viewing your resident's files and assessments
    - Viewing your EPA suites
    - Updating a resident file with competence committee meeting decisions
  - Training on Procedure Log Module (time-permitting)
- Session 2
  - Managing your competence committee and academic advisor membership
  - Setting up and Preparing for a competence committee
  - Training on the Rotation Schedules Module
  - Training on Events Module

# Detailed Agenda for Today

- 0900–0910 – Welcome, housekeeping, logging in, orientation to UAT environment and test accounts
- 0910–0915 – demo of resident homescreen and triggering EPAs and logging procedures
- 0915–0925 – hands on practice – sign in as your test resident, send an EPA request to yourself
- 0925–0935 – demo of resident learning path dashboard and how they see their schedule
- 0935 – 0945 – hands on practice – explore a resident learning path dashboard and schedule
- 0945–0950 – demo of Supervisor Portal and preceptor functions
- 0950–1005 – hands on practice – sign in as yourself (supervisor) – complete EPA and initiate an EPA
- 1005–1015 – BREAK
- 1015–1020 – Orientation to Admin Portal and modules
- 1020–1035 – Learner Curriculum > learner dashboard demo (performance data)
- 1035–1045 – hands on practice – explore resident performance data (EPAs, procedures, etc)
- 1045–1105 – Preparing for a CC meeting and entering decisions during/post meeting
- 1105–1115 – hands on practice – recording CC meeting details and decisions
- 1115–1130 – Program Curriculum demo
- 1130–1140 – hands on practice – explore an EPA
- 1140–1145 – Procedure Log Module Demo (time permitting – not critical)
- 1145–1150 – wrap up / questions

# Kraig: Housekeeping and Log in page - UAT

**MedSIS 3C** Campus Edition | CUMMING SCHOOL OF MEDICINE UNIVERSITY OF CALGARY

This is not a production environment. USER ACCEPTANCE TESTING

Home | Login | Privacy | FAQ | Contact Us

## Login

**Protect your privacy!** Prevent unauthorized use! Completely exit your web browser when you are finished.

**Login with Ucalgary or AHS accounts - SSO**

Please, click the button to enter MedSIS 3C using your UCalgary or AHS credentials provided (these are not interchangeable).

[Continue with SSO](#)

**Login**

**Username:**

**Password:**

[Forgot your password?](#)

[Do you need login help?](#)

[Contact MedSIS 3C Help Desk](#)

The login and password fields above are for TEST RESIDENT profiles only. PA/PD/CC Chairs and Supervisors/Residents do not have password accounts and must use their UCalgary or AHS credentials provided (these are not interchangeable). Please use the SSO link above to log in to your account.

[Login](#)

The recommended browser for MedSIS 3C is Google Chrome version 72 above. Other browsers such as Safari, Mozilla Firefox, Microsoft Edge, and Internet Explorer 11 are compatible.

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# What will MedSIS look like for your residents?

*Log in as your test resident*

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Home Login Privacy FAQ Contact Us

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# Resident / Learner – Home page

**MedSIS 3C** Campus Edition | CUMMING SCHOOL OF MEDICINE UNIVERSITY OF CALGARY

Home > Learner Portal

**Welcome, Ashley Lintest!**

You are now logged on to **MedSIS 3C**, the Internet-based full-function management system for the Cumming School of Medicine, University of Calgary and its associated teaching hospitals, powered by LGI Healthcare Solutions Inc.

**Latest news**

**"The Anti-Burn [Cook]book - A Cookbook For Residents By Residents**  
As part of a PARA Wellness Grant, Pediatrics Resident, Meagan developed a homemade recipe book to help residents have healthy food while on call.  
16-Jul-2024 09:54, by Helene Da  
[details...](#)

**Evaluations**

You have **0** incomplete evaluations.  
Click here to generate a new evaluation **+ Trigger on demand**

**Procedures**

Click here to log a new Procedure **+ Log a Procedure**

**Upcoming Events**

**Thursday, 18 July 2024**  
6:00 PM - 8:00 PM: EMERG - Journal Club  
Calgary  
[details...](#)

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**Log Out**

**Password**  
DO NOT UPDATE TEST PWD

Do an EPA observation on another resident

\*\*\* this function may not be present in the testing environment for test residents\*\*\*

Trigger an assessment

Log a procedure

# Triggering EPA/Narrative Observations: on desktop (Home screen)

Home > Learner Portal

## Welcome, Ashley Lintest!

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**Latest news**

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16-Jul-2024 09:54, by Helene Da

**Evaluations**

You have **0** incomplete evaluations.  
Click here to generate a new evaluation **Trigger on demand**

**Procedures**

Click here to log a new Procedure **Log a Procedure**

**Upcoming Events**

**Thursday, 11 July 2024**  
6:00 AM - 8:00 PM: EMERG - Journal Club  
Calgary

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**Trigger on demand evaluation**

Evaluation Type: \* --Select--

Search

CLEAR

Narrative Observation

EPA Observation

**Trigger on demand evaluation**

Evaluation Type: \* EPA Observation

Learner (Evaluatee)\*: Thiestest, Brandon

Learning Path\*: Emergency Medicine - Emergency Medicine 2024

Activity\*: Adult Emergency Medicine, Location: Calgary, Period: 01-Jul-2024/2...

EPA\*: --Select--

Eval Form\*: --Select--

Supervisor(Evaluator)\*: --Select--

**Send** **Cancel**

# Form Completion Options

## 3 Options for Residents:

 Send to Evaluator

Send a **“blank” form** to the Evaluator (preceptor gets an email notification with a link to form)

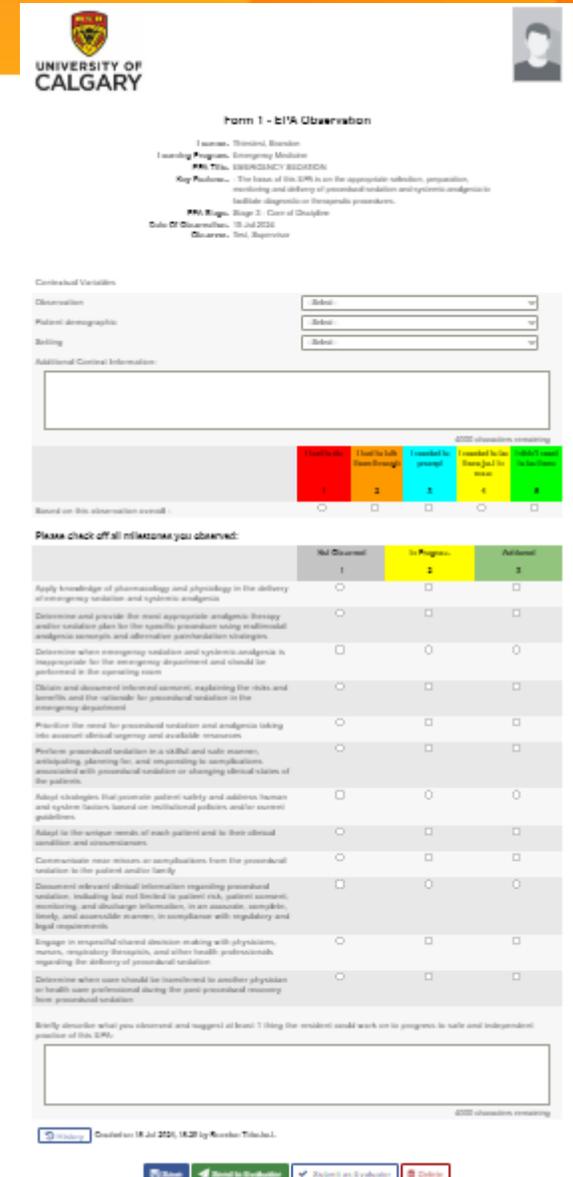
 Send to Evaluator

**Prefill the form** and send to the Evaluator (preceptor gets an email notification with link to form – can edit as needed)

 Submit as Evaluator

Complete the form **“Submit as Evaluator”** (preceptor gets an email notification) (Residents should get permission from you to do this!)

Note: if you save the evaluation but do not send/submit it, it will stay as a draft.



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Form 1 - E/A Observation

1 year, 3 month, 6 month  
Learning Program: Emergency Medicine  
PRO Title: EMERGENCY MEDICINE  
Key Purpose: The focus of this OPE is on the appropriate selection, preparation, monitoring and delivery of procedural sedation analgesia and/or conscious sedation in appropriate procedures.  
PRO Stage: Stage 3: Core of Discipline  
Date Of Observation: 18 Jul 2025  
Observer: Neil, Supervisor

Contracted Variables

Observation:

Patient demographics:

Rating:

Additional Central Information:

2025 observations remaining

	1	2	3	4	5
Apply knowledge of pharmacology and physiology in the delivery of emergency sedation and systemic analgesia	<input type="checkbox"/>				
Determine and provide the most appropriate analgesia therapy and/or sedation plan for the specific procedure using multimodal analgesic strategies and alternative paracetamol strategies	<input type="checkbox"/>				
Determine when emergency sedation and systemic analgesia is appropriate for the emergency department and should be performed in the operating room	<input type="checkbox"/>				
Obtain and document informed consent, explaining the risks and benefits, and the rationale for procedural sedation in the emergency department	<input type="checkbox"/>				
Assess the need for procedural sedation and analgesia taking into account clinical urgency and available resources	<input type="checkbox"/>				
Perform procedural sedation in a skilled and safe manner, anticipating, planning for, and responding to complications associated with procedural sedation or changing clinical status of the patient	<input type="checkbox"/>				
Adopt strategies that promote patient safety and address human and system factors based on individual patient and/or current guidelines	<input type="checkbox"/>				
Adapt to the unique needs of each patient and to their clinical condition and circumstances	<input type="checkbox"/>				
Communicate near written or verbalized from the procedural sedation to the patient and/or family	<input type="checkbox"/>				
Document relevant clinical information regarding procedural sedation, including but not limited to patient risk, patient consent, monitoring, and discharge information, in an accurate, complete, timely, and accessible manner, in compliance with regulatory and legal requirements	<input type="checkbox"/>				
Engage in respectful shared decision making with physician, nurse, respiratory therapist, and other health professionals regarding the delivery of procedural sedation	<input type="checkbox"/>				
Determine when care should be transferred to another physician or health care professional during the post-procedural recovery from procedural sedation	<input type="checkbox"/>				

Specify elsewhere what you observed and suggest at least 1 thing the resident could work on to progress in safe and independent practice of this OPE.

2025 observations remaining

Created on 18 Jul 2025, 16:28 by ResUser:TKMuel...

# Form Completion Options

## 3 Options for Residents:

Send to Evaluator

Send a **“blank” form** to the Evaluator (preceptor gets an email notification with a link to form)

Send to Evaluator

**Prefill the form** and send to the Evaluator (preceptor gets an email notification with link to form – can edit as needed)

Submit as Evaluator

Complete the form **“Submit as Evaluator”** (preceptor gets an email notification) (Residents should get permission from you to do this!)

Note: if you save the evaluation but do not send/submit it, it will stay as a draft.

# Logging a Procedure: on desktop (Home screen)

**Home**

Home > Learner Portal

## Welcome, John Ahtest!

You are now logged on to MedSIS 3C, the Internet-based full-function management system for the Cumming School of Medicine, University of Calgary and its associated teaching hospitals, powered by LGI Healthcare Solutions Inc.

**Latest news**

**New Kinsmen Chair in Pediatric Neurosciences improving quality of life for babies with potentially fatal brain condition**  
UCalgary Professor of Neurosurgery Dr. Jay Riva-Cambrin is testing a less-invasive treatment for infants with excess fluid buildup in the brain  
10-Sep-2024 18:03, by Helene Da

**Workshop: Medical Ethics - Book your calendar - Oct 17, 2024**  
The new Medical Ethics workshop will be happening on Thursday, October 17, 2024 from 1pm to 4pm. More details on our Event page.  
10-Sep-2024 18:00, by Helene Da

**Evaluations**

You have 0 incomplete evaluations.  
Click here to generate a new evaluation [Trigger on demand](#)

**Procedures**

Click here to log a new Procedure [Log a Procedure](#)

**Upcoming Events**

No upcoming events.

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**Procedure Log - Common** [Download](#) [Close](#)

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### Procedure Log Evaluation

Learner: and, marwat  
Category: UAI / Procedure Log  
Procedure: UAI / Procedure Log Details  
Learner Program / Level: Emergency Medicine / PGY5  
Rotation / Program: Aerospace Medicine - STARS / Emergency Medicine  
Location: Calgary  
Period: 01-Jul-2024 / 25-Jul-2024

**Procedure Details**

Date of Procedure:

Number of Logs:

Patient Type:  Real Patient  Simulation

Comments:

4000 characters remaining

**Log New Procedure**

Evaluation Type: \* Procedure Log

Learner (Evaluatee)\*: Ahtest, John

Course/Rotation\*: Neurosurgery PGY1 [29-Jul-2024 / 25-Aug-2024]

Program\*: Neurosurgery

Category\*: --Select--

Eval Form\*:

Supervisor(Evaluator):

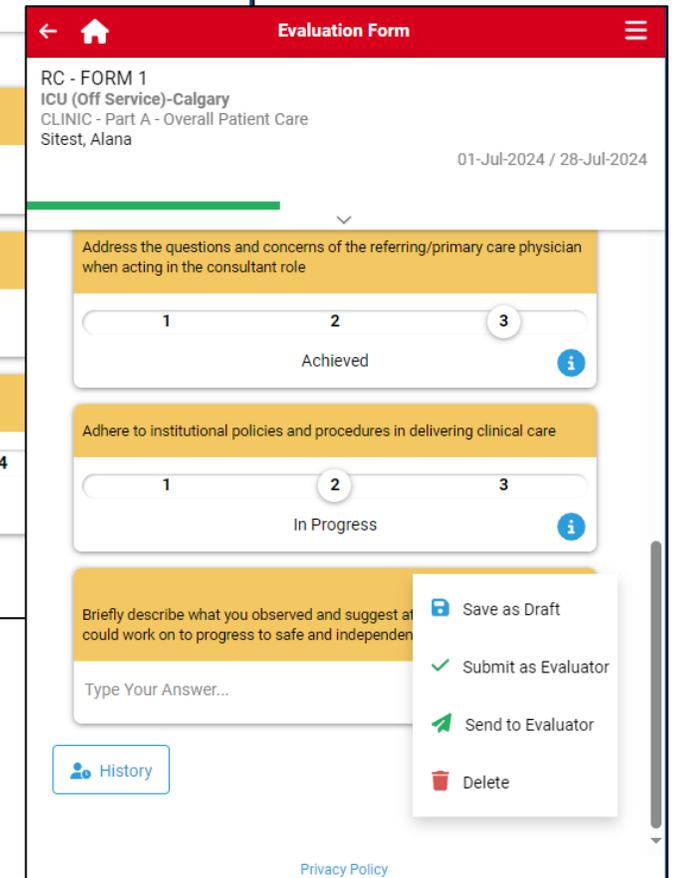
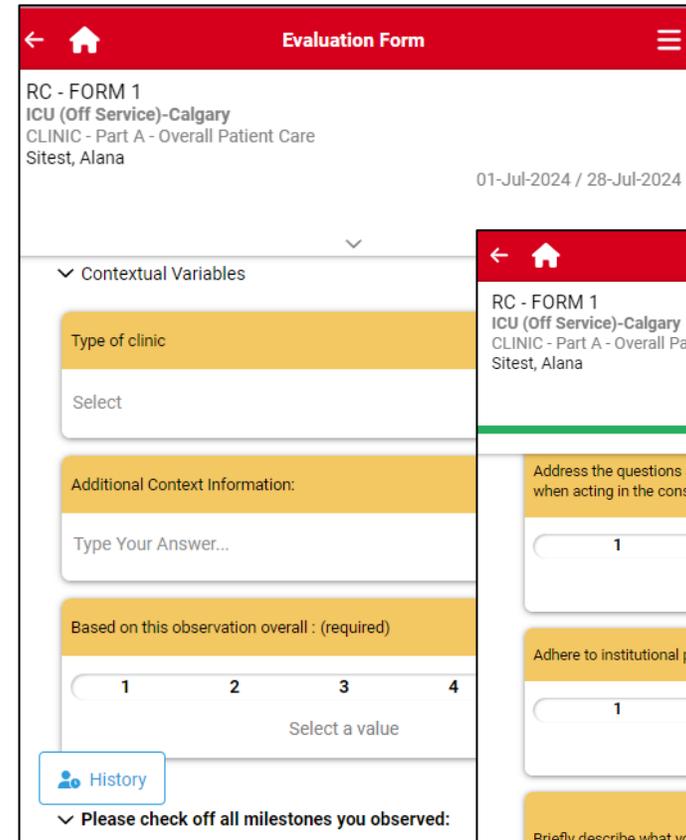
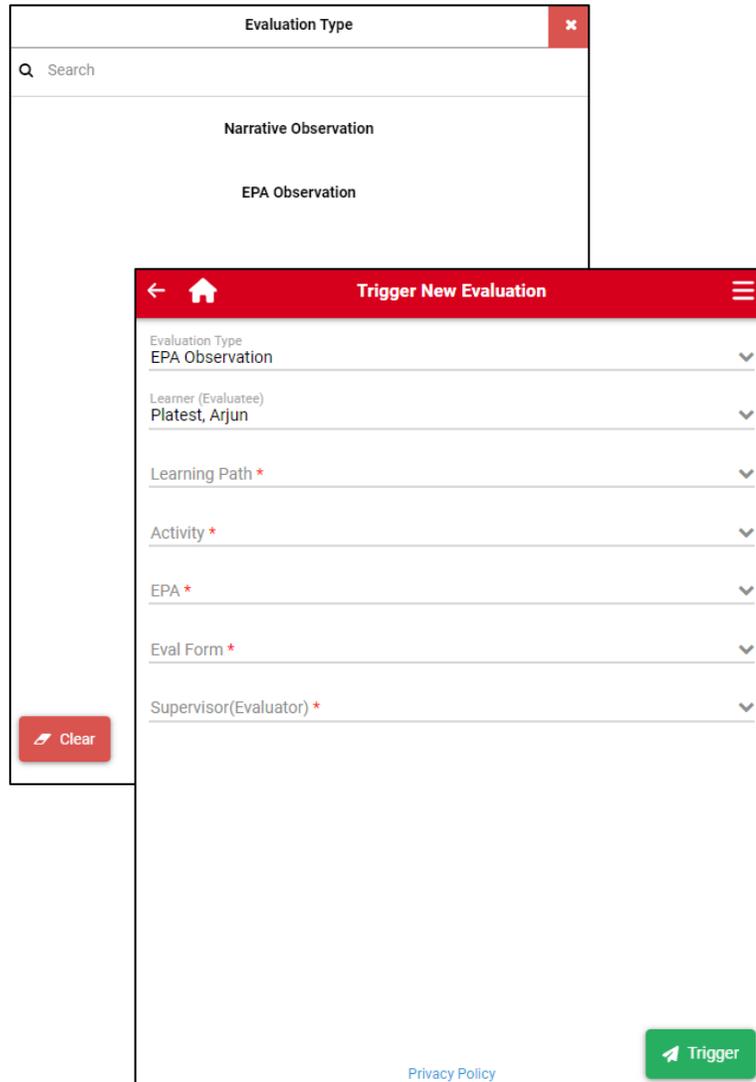
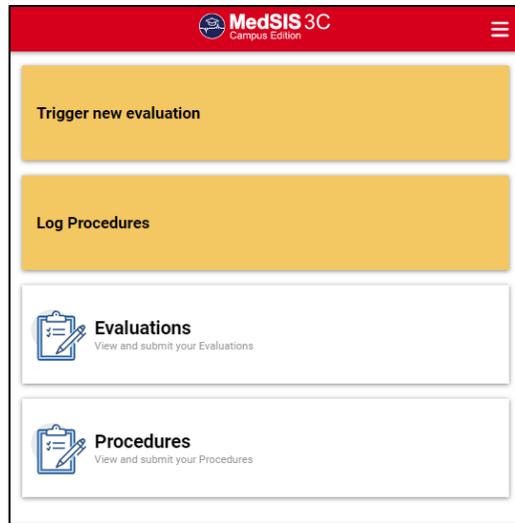
**Root > Core 10 – CSF Disorder**

- Chiari
- Cyst
- ETV
- shunt insertion
- shunt revision
- Syrinx to SAH/P shunt

History Created on 18-Jul-2024, 02:17 by marwat and.

[Save](#) [Submit](#)

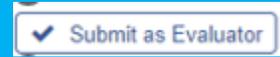
# Triggering an EPA/Narrative, Logging Procedure via Mobile



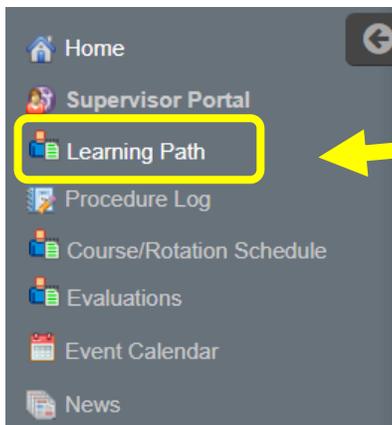
1

### PRACTICE:

- 1) Trigger an EPA (as your test resident), select yourself as the Supervisor, enter a bit of data, then **Send to Evaluator** (YOU!)
- 2) Trigger an EPA (as your test resident), select yourself as the Supervisor, fill out the form, then **Submit as Evaluator**




# Resident View: Learning Path



Select Learning Path (= EPA suite(s) version/Program)

Then click on a learning path

Home > Learner Portal > Learning Path

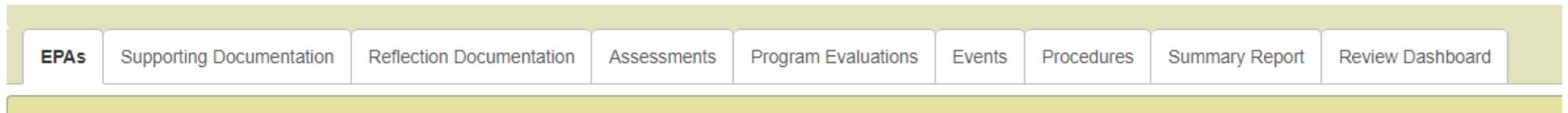
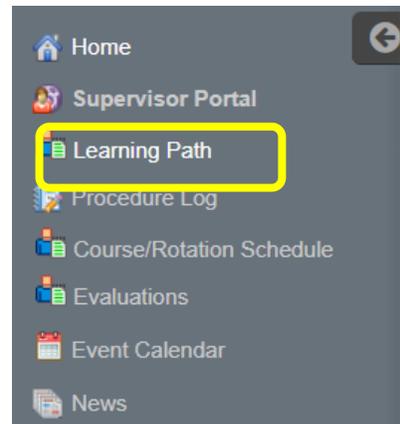
**Lintest, Ashley**  
Unique ID: 920028023 , Student #:  
PGY2 , PGME , Emergency Medicine , 01-Jul-2024 / 30-Jun-2025  
Advisor/Academic Coach:  
Registered Active New Trainee

Learning Path

**Emergency Medicine - Emergency Medicine 2024 (01-Jul-2023) Official** Progressing as expected

Stage	Start Date	Achieved Date	Progress
Stage 1 - Transition to Discipline		04-Jul-2024	0%
Stage 2 - Foundations of Discipline // <b>CURRENT</b>	01-Jul-2024		0%
Stage 3 - Core of Discipline			0%
Stage 4 - Transition to Practice			0%

# Resident View: Tabs in “Learning Path”



- **EPAs:** EPA description and progress
- **Supporting Documentation:** upload documents
- **Reflection Documentation:** personal documents. Can be private (visible by resident only) or public (= visible by assigned PA, PD, CC members, Academic Coach)
- **Assessments:** can be filtered by type, completion status, rotations etc (*only CBD assessments – remainder not implemented yet, still in one45 until July 2025*)
- **Program Evaluations:** summary of program evaluations (evaluations of preceptors, rotations, half day etc) (*not implemented yet, still in one45 until July 2025*)
- **Events:** event list with attendance (half days, rounds, J club etc)
- **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, decisions, feedback

# DEMO – Learning Path – EPA tab – Paul Acetest (resident)

Emergency Medicine - Emergency Medicine 2024

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

← Back

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

-- All Data --

Search:

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]	49%				⊙ In Progress	
∨ EPA 1. RESUSCITATION	77%		11	0 1 2 3 5	⊙ In Progress	+ Add note
Collect 10 observations of achievement	80%					
At least 1 of each clinical presentation	75%					
> EPA 2. UNCOMPLICATED URGENT AND NON	0%		1	0 0 1 0 0	⊙ Pending	+ Add note
> EPA 3. TEAM	20%		2	0 0 0 1 1	⊙ In Progress	+ Add note
> EPA 4. SA APPRAISAL	100%		3	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	

- 1 Overall stage progress
- 2 EPA details and progress status
- 3 “Add Note”: the Learner can post a private note that can only be viewed by them, or publish a note that can be viewed by permitted users (PA, PD, CC members, CC Chair, Academic Advisor)
- 4 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 for the stage or EPA have been met (ready for Competence Committee review)

# DEMO – Learning Path – Supporting documentation tab

Home > Learner Portal > Learning Path

Home | Supervisor Portal | **Learning Path** | Procedure Log | Course/Rotation Schedule | Evaluations | Event Calendar | News

Lintest, Ashley 1 Alert(s)

Unique ID: 54695 , Student #: 54695    Email: [ashley.lintest@medsis3c.com](mailto:ashley.lintest@medsis3c.com)

PGY2 , PGME , Emergency Medicine , 01-Jul-2024 / 30-Jun-2025

Advisor/Academic Coach: **Graytest, John**

Registered   Active   New Trainee

### Emergency Medicine - Emergency Medicine 2024

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

[← Back](#)

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

[+ Add Documentation](#)

Categories	Description	CanMEDS Role	Curriculum Item	Files	Last Updated
	test 2	Health Advocate	RESUSCITATION	<a href="#">Test2.pdf</a>	in 18-Jul-2024 at 11:09
	Test 24	Collaborator	UNCOMPLICATED URGENT AND NON	<a href="#">Scholarly Project Supervisor Update (U of C).docx</a>	in 24-Jul-2024 at 10:16
	Test			<a href="#">Test4.pdf</a>	in 16-Jul-2024 at 11:48

# DEMO – Learning Path – Assessments tab

Home > Learner Portal > Learning Path

Home | Supervisor Portal | **Learning Path** | Procedure Log | Course/Rotation Schedule | Evaluations | Event Calendar | News

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

← Back

Evaluations

All Evaluations ← Can filter

Legend: Template Record (blue), Hidden Evaluation (orange), Hidden Template (green)

CBME Evaluation Total: 37

Search:

Can sort columns

<input type="checkbox"/>	Activity	Start Date	End Date	Evaluation	Trigger	Source	Created By	Evaluator	Evaluatee	Status	Action
<input type="checkbox"/>	Adult Emergency Medicine	29-Jul-2024	25-Aug-2024	RC - FORM 1 <a href="#">Q</a> AIRWAY	Start of Rotation 03-Aug-2024	On-Demand	Lintest, Ashley 03-Aug-2024	McTest, Christopher	Lintest, Ashley	✓ Completed 03-Aug-2024	<a href="#">View</a>
<input type="checkbox"/>	Adult Emergency Medicine	29-Jul-2024	25-Aug-2024	RC - FORM 1 <a href="#">Q</a> BASIC LIFE SUPPORT	Start of Rotation 01-Aug-2024	On-Demand	Lintest, Ashley 01-Aug-2024	Andi, Martest	Lintest, Ashley	🕒 In Progress	
<input type="checkbox"/>	Adult Emergency Medicine	29-Jul-2024	25-Aug-2024	RC - FORM 1 <a href="#">Q</a> BASIC LIFE SUPPORT	Start of Rotation 31-Jul-2024	On-Demand	Lintest, Ashley 31-Jul-2024	McTest, Christopher	Lintest, Ashley	🕒 In Progress	
<input type="checkbox"/>	Emergency Nursing Shifts-Calgary	01-Jul-2024	28-Jul-2024	RC - FORM 4 <a href="#">Q</a> SA APPRAISAL	Start of Rotation 24-	Single-Send	Redtest, Brittany 24-Jul-2024	Andi, Martest	Lintest, Ashley	🕒 Pending	

# DEMO – Learning Path – Program Evaluations

Emergency Medicine - Emergency Medicine 2024

**Learner:** Lintest, Ashley

**Start Date:** 01-Jul-2023

**Current Stage:** Stage 2 - Foundations of Discipline

*To be implemented in  
July 2025*

← Back

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

☰ Program Evaluations

Total: 4

Search:

📄 Export

<input type="checkbox"/>	Evaluation Type	^	Completed	◇	Pending	◇	Expired	◇
<input type="checkbox"/>	Course/Rotation Evaluation		0		0		0	
<input type="checkbox"/>	Event Evaluation		0		0		0	
<input type="checkbox"/>	Presenter Evaluation		0		0		0	
<input type="checkbox"/>	Teacher Evaluation		0		0		0	

Showing 1 to 4 of 4 entries   Show 25 ▾ entries

First   Previous   1   Next   Last

Shows number of evaluations resident has completed (on rotations, teachers, AHD etc)

# DEMO – event tab

Navigation bar with tabs: EPAs, Supporting Documentation, Reflection Documentation, Assessments, Program Evaluations, **Events**, Procedures, Summary Report, Review Dashboard. A "Back" button is located on the right.

## Event Attendance

Absent: **1**

Exempted: **0**

Present: **1**

Sessions **0**  
Presented:

Search bar with a magnifying glass icon, the text "Search", a close button (X), and a menu icon (three dots).

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  entries

[First](#) [Previous](#) [1](#) [Next](#) [Last](#)

Shows resident event attendance (AHD etc)

# DEMO – Procedures Tab

[EPAs](#)
[Supporting Documentation](#)
[Reflection Documentation](#)
[Assessments](#)
[Program Evaluations](#)
[Events](#)
[Procedures](#)
[Summary Report](#)
[Review Dashboard](#)
[Back](#)

**Procedure Dashboard**

Supervisors:  
[+ Log a Procedure](#)

**Procedure Log** Total:13

Search:

<input type="checkbox"/>	Procedure Name	Category Name	Procedure Program	Activity ^	Start Date v	End Date v	Evaluation	Created By v	Supervisor v	Evaluatee ^	Status	Action	Expiry Date
<input type="checkbox"/>	Respiratory distress	Foundation 2 - Resuscitation	Emergency Medicine	Adult Emergency Medicine	29-Jul-2024	25-Aug-2024	Procedure Log - Common <a href="#">Q</a>	Lintest, Ashley 19-Aug-2024		Lintest, Ashley	<span style="background-color: #28a745; color: white; padding: 2px;">✓ Submitted</span> 19-Aug-2024	<a href="#">View</a>	
<input type="checkbox"/>	Respiratory distress	Foundation 2 - Resuscitation	Emergency Medicine	Adult Emergency Medicine	29-Jul-2024	25-Aug-2024	Procedure Log - Common <a href="#">Q</a>	Lintest, Ashley 19-Aug-2024		Lintest, Ashley	<span style="background-color: #28a745; color: white; padding: 2px;">✓ Submitted</span> 19-Aug-2024	<a href="#">View</a>	
<input type="checkbox"/>	Respiratory distress	Foundation 2 - Resuscitation	Emergency Medicine	Adult Emergency Medicine	29-Jul-2024	25-Aug-2024	Procedure Log - Common <a href="#">Q</a>	Lintest, Ashley	Bennett, Esther	Lintest, Ashley	<span style="background-color: #ffc107; color: white; padding: 2px;">⌚ Pending Approval</span>	<a href="#">Continue</a>	28-Aug-2024

# DEMO – Summary Report

[← Back](#)

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  Family Medicine EPAs

EPA:  Summary  Milestones  Contextual Variables  Comments  Notes

Narrative:

ITERS/WBAs:

Procedures:

Attendance:

 [Generate](#)

 [Clear](#)

# DEMO – Learning Path – Review Dashboard

Emergency Medicine - Emergency Medicine 2024

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

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

Competence Committee Preparation, Period: December 1st 2024 Total: 8

Search:

Sequence #	Requirement	Responsible for Requirement	Template Files	Files	Due Date	Step Complete	Last Updated
1	Resident Self Reflection	Learner	<a href="#">Resident Self Reflection (U of C).docx</a>	<a href="#">Resident Self Reflection (U of C)-filled.docx</a>		<input checked="" type="checkbox"/>	16-Jul-2024
2	Academic Advisor/Coach Report	Academic Coach	<a href="#">Academic Advisor_Coach Report (U of C).docx</a>			<input type="checkbox"/>	
3	Supplementary Information from Program Administrator	Administrator	<a href="#">Supplementary Information from Program Administrator (U of C).docx</a>			<input type="checkbox"/>	
4	Scholarly Project Supervisor Update	Administrator	<a href="#">Scholarly Project Supervisor Update (U of C).docx</a>			<input type="checkbox"/>	
5	QI Project Supervisor Update	Administrator	<a href="#">QI Project Supervisor Update (U of C).docx</a>			<input type="checkbox"/>	
6	Primary Reviewer Report	Competency Committee	<a href="#">Primary Reviewer Report (U of C).docx</a>			<input type="checkbox"/>	
7	Secondary Reviewer Report	Competency Committee	<a href="#">Secondary Reviewer Report (U of C).docx</a>			<input type="checkbox"/>	
8	Competence Committee Feedback to Resident	Competency Committee	<a href="#">Competence Committee Feedback to Resident (U of C).docx</a>			<input type="checkbox"/>	

Showing 1 to 8 of 8 entries Show 25 entries First Previous 1 Next Last

The review dashboard displays documents related to a given Competence Committee Meeting

- 1 Link to download template and upload documents (filled template and others)
- 2 Indicates who is responsible to completing document
- 3 Download blank template
- 4 Uploaded completed file(s)
- 5 Step complete (= files are final/ ready for review)

**Note:** we will go more on detail in the Competence Committee training part

# DEMO – Course/Rotation Schedule

The screenshot shows the MedSIS 3C Campus Edition interface for the Cumming School of Medicine at the University of Calgary. The user is logged in as Ashley Lintest, a PGY2, PGME, Emergency Medicine trainee. The interface displays a list of courses/rotations for the 2024-2025 session. The 'Course/Rotation Schedule' menu item is highlighted in the left sidebar. A blue arrow points to the 'Research EMERG' row in the table below.

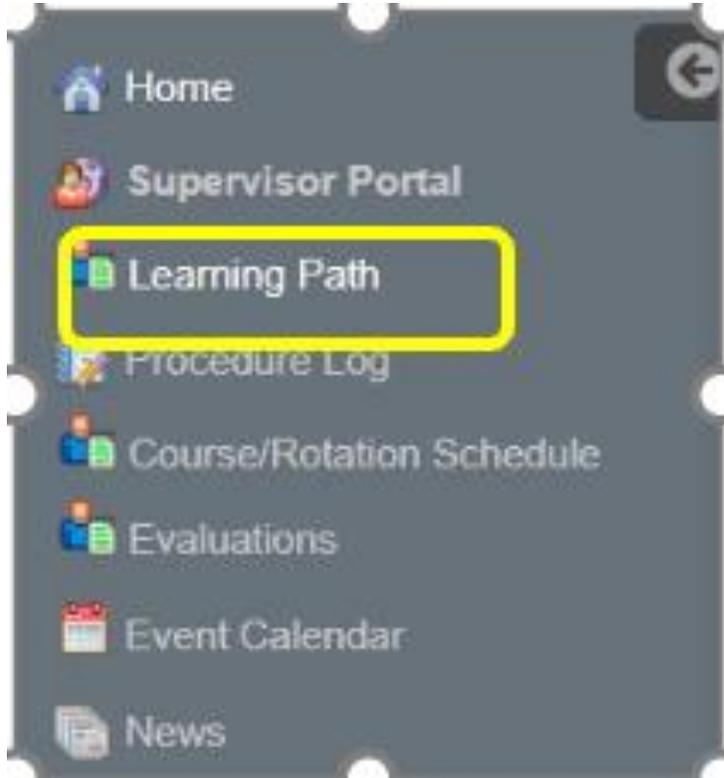
**Lintest, Ashley**  
Unique ID: [redacted] | Email: [redacted]  
PGY2 , PGME , Emergency Medicine , 01-Jul-2024 / 30-Jun-2025  
Advisor/Academic Coach: **Graytest, John**  
Registered Active New Trainee

**Courses/Rotations** Session: 2024-2025

Search: [input field]

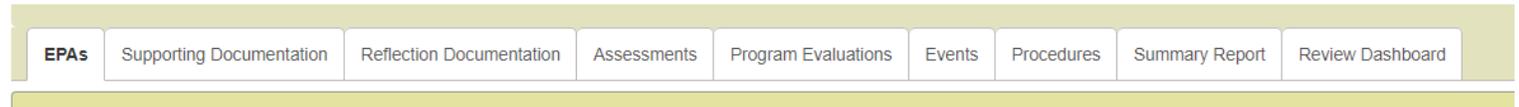
Course/Rotation	Course/Rotation Type	Course/Rotation Program	Location	Format	Training Level	Block	Start Date	End Date	Supervisors
Emergency Nursing Shifts		Emergency Medicine	Calgary	Core	PGY2	Block 1	01-Jul-2024	28-Jul-2024	
Adult Emergency Medicine		Emergency Medicine	Calgary	Core	PGY2	Block 2	29-Jul-2024	25-Aug-2024	
Neurology - Adult		Neurology - Adult	Calgary	Core	PGY2	Block 3	26-Aug-2024	22-Sep-2024	
Plastic Surgery FMC		Plastic Surgery	Calgary	Core	PGY2	Block 4	23-Sep-2024	20-Oct-2024	
Research EMERG		Emergency Medicine	Calgary	Core	PGY2	Block 5	21-Oct-2024	17-Nov-2024	

Click on rotation to see details (location, service, preceptor etc)

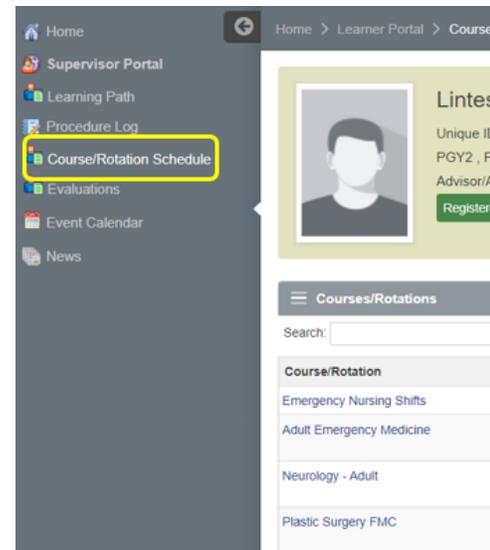


## Explore

### a) Learning Path – Resident Dashboard



### b) Course/Rotation Schedule



# What will MedSIS look like for your preceptors?

Log out of your resident profile

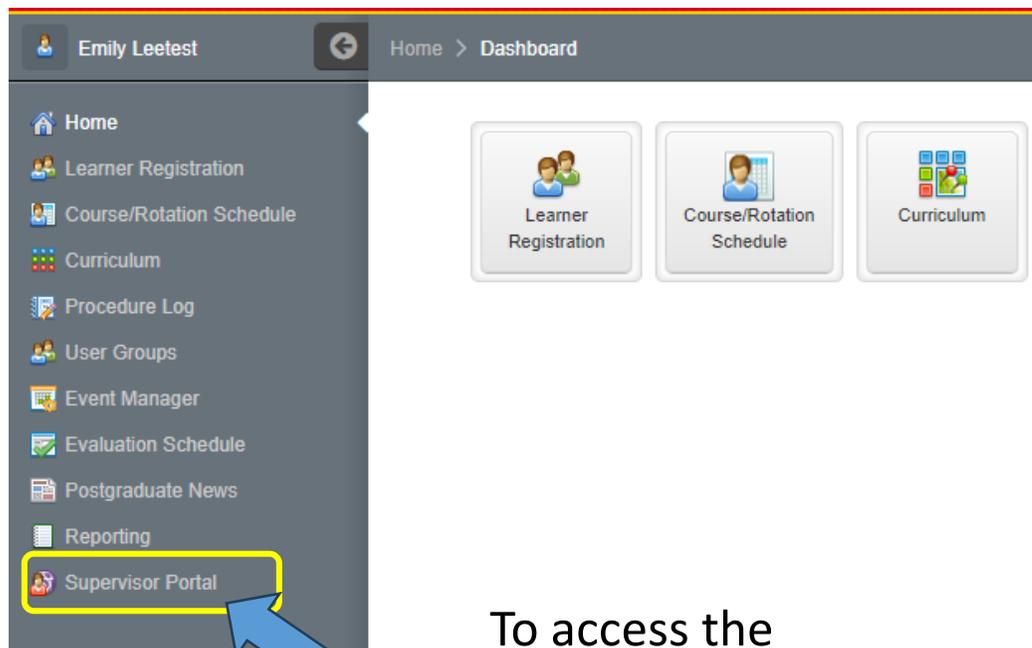


Log in as yourself – you are a preceptor!

Trainer:  
Ashley Lintest - PA

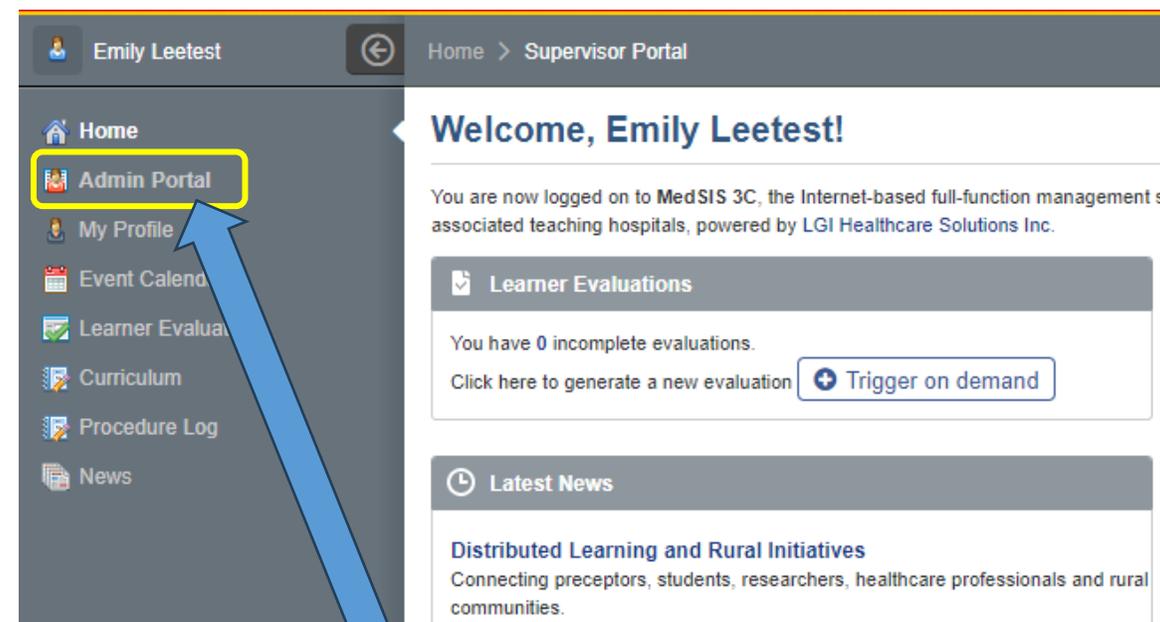
# For double profiles: Admin (PD/CC Chair) and Supervisor

## Administration Portal (PA/PD/CC Chair)



To access the  
Supervisor  
Portal

## Supervisor Portal



To access the  
Administration Portal

# Supervisor Portal – Home Page

The screenshot shows the MedSIS 3C Supervisor Portal Home Page. The top navigation bar includes the MedSIS 3C logo, the user name 'John Graytest', and the breadcrumb 'Home > Supervisor Portal'. A 'Trigger an assessment' button is visible in the top right. The main content area features a 'Welcome, John Graytest!' message, a 'Learner Evaluations' section with a 'Trigger on demand' button, an 'Upcoming Events' section for Thursday, 18 July 2024, and a 'Latest News' section with a news item titled 'Distributed Learning and Rural Initiatives'. A sidebar on the left contains navigation links, with 'Supervisor Portal' highlighted. A 'Log Out' button is in the top right corner. Annotations include a callout for the '#', a 'Trigger an assessment' button, a 'Password' warning, and a 'Log Out' button. A large blue arrow points from the 'Supervisor Portal' link in the sidebar to the main content area. A blue box in the bottom right contains a list of features: 'Event Calendar: rounds, academic half day precepting, journal club ...' and 'News: PGME news'.

Click on the # to go to your To Do list

Trigger an assessment

Password  
DO NOT CHANGE PWD IN UAT

Log Out

Home

My Profile

Event Calendar

Learner Evaluations

Curriculum

Procedure Log

News

Course/Rotation Schedule

Curriculum

Procedure Log

User Groups

Event Manager

Evaluation Schedule

Postgraduate News

Reporting

Supervisor Portal

Welcome, John Graytest!

You are now logged on to **MedSIS 3C**, the Internet-based full-function management system for the Cumming School of Medicine, University of Calgary and its associated teaching hospitals, powered by LGI Healthcare Solutions Inc.

**Learner Evaluations**

You have **5** incomplete evaluations.  
Click here to generate a new evaluation [+ Trigger on demand](#)

**Upcoming Events**

**Thursday, 18 July 2024**  
6:00 PM - 8:00 PM: EMERG - Journal Club  
Calgary

**Latest News**

**Distributed Learning and Rural Initiatives**  
Connecting preceptors, students, researchers, healthcare professionals and rural communities.  
16-Jul-2024 17:37, by Helene Da

**UNIVERSITY OF CALGARY**

Medical School Information System  
© LGI Healthcare Solutions Inc. 2024 | Privacy Policy

- **Event Calendar:** rounds, academic half day precepting, journal club ...
- **News:** PGME news

# Supervisor Portal > Learner Evaluations – Review Your Learner Assessments

John Graytest Home > Supervisor Portal > Learner Evaluations

Evaluations 3 incomplete evaluations

All Evaluations 1 4 + Trigger on demand ...

Hidden Evaluation

CBME Evaluation Show Hidden records No Total:3

Activity	Start Date	End Date	Evaluation	Source	Created By	Evaluator	Evaluatee	Status	Action	Expiry Date	Feedback	Files
Emergency Nursing Shifts-Calgary	01-Jul-2024	28-Jul-2024	RC - FORM 1 Q TEAM	On-Demand	Lintest, Ashley 16-Jul-2024	Graytest, John	Lintest, Ashley Q	Completed 16-Jul-2024	View			
Emergency Nursing Shifts-Calgary	01-Jul-2024	28-Jul-2024	RC - FORM 1 Q UNCOMPLICATED URGENT AND NON	On-Demand	Lintest, Ashley 16-Jul-2024	Graytest, John	Lintest, Ashley Q	In Progress	Continue Decline	End of day		
Emergency Nursing Shifts-Calgary	01-Jul-2024	28-Jul-2024	RC - FORM 1 Q TEAM	On-Demand	Lintest, Ashley 16-Jul-2024	Graytest, John	Lintest, Ashley Q	In Progress	Continue Decline	End of day		

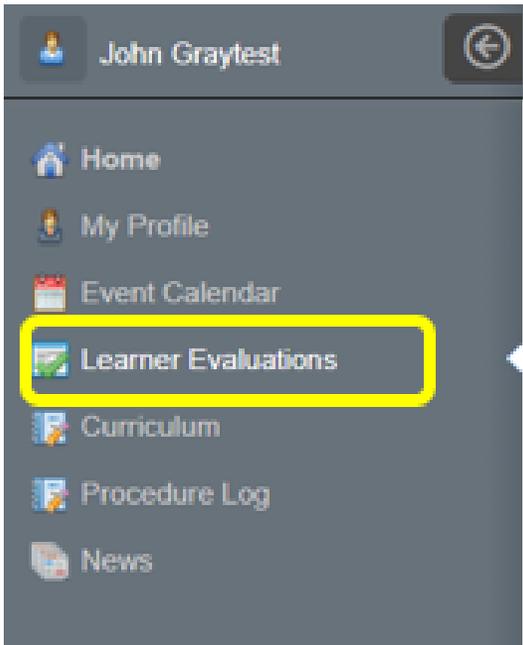
Showing 1 to 3 of 3 entries Show 15 entries

First Previous 1 Next Last

- 1 **Filter (and pin) Evaluations:** by date, learner, rotation, evaluation type and status (completed, pending, in progress etc)
- 2 **Action:** click on Continue to review the assessment, click on Decline if applicable
- 3 **Files:** to open files attached by the resident (optional)
- 4 **Trigger on demand:** start a new evaluation/assessment

3

# Supervisor Portal: PRACTICE



In your Supervisor Portal  
Go to your Learner Evaluations  
a) View the evaluation your test learner submitted on your behalf  
b) Complete and submit the evaluation that was sent to you

Demo:  
Ashley Lintest - PA

# MedSIS for PAs, PDs, CC Chairs

# You have 2 portals: Admin (PD/CC Chair) and Supervisor

Click to access to the Administration Portal



The screenshot shows the MedSIS 3C Supervisor Portal interface. At the top, the user's name 'Emily Leetest' is displayed next to a home icon and a breadcrumb trail 'Home &gt; Supervisor Portal'. A sidebar on the left contains a list of navigation options: Home, Admin Portal (highlighted with a yellow box), My Profile, Event Calendar, Learner Evaluations, Curriculum, Procedure Log, and News. The main content area features a 'Welcome, Emily Leetest!' message, a notification that the user is logged on to MedSIS 3C, and a 'Learner Evaluations' section showing 0 incomplete evaluations with a 'Trigger on demand' button. Below this is a 'Latest News' section with a link to 'Distributed Learning and Rural Initiatives'.

# Orientation to your Landing Page (Admin Portal)

Multiple modules available: shown on grey sidebar and tiles (they are the same)

MedSIS 3C Campus Edition

CUMMING SCHOOL OF MEDICINE UNIVERSITY OF CALGARY

Hannah Hilltest Home > Dashboard

- Home
- Learner Registration
- Course/Rotation Schedule
- Curriculum
- Procedure Log
- User Groups
- Event Manager
- Evaluation Schedule
- Supervisors
- Postgraduate News

Learner Registration

Course/Rotation Schedule

Curriculum

Procedure Log

User Groups

Event Manager

Evaluation Schedule

Supervisors

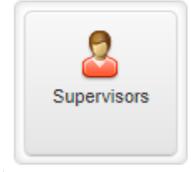
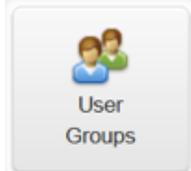
Postgraduate News

**Latest News**

**Distributed Learning and Rural Initiatives**  
Connecting preceptors, students, researchers, healthcare professionals and rural communities.  
16-Jul-2024 17:37, by Helene Da

**"The Anti-Burn [Cook]book - A Cookbook For Residents By Residents**  
As part of a PARA Wellness Grant, Pediatrics Resident, Meagan developed a homemade recipe book to help residents have healthy food while on call.  
16-Jul-2024 09:54, by Helene Da

# What we will cover today



## Curriculum

- Find your **resident's** files and view their **progress**
- Manage your **competence committee meetings**
- Edit your **academic advisors** and CC membership

Slide  
38

## Procedure Log

- Summary of procedure logs filed by residents (number of logs assessed)

Slide  
87

## Course/Rotation Schedule

- View and revise your resident's rotation schedules

Session  
2

## User Groups

- List of **Academic Advisors**
- Link to add, update, assign, remove Academic Coach
- Edit your **Competence Committee Member** list and roles

Session  
2

## Supervisors

- List of all Supervisors/Preceptors in MedSIS

## Postgraduate News

- See messages from PGME

# LOST?

- If you find yourself lost in MedSIS as you try to follow along, get back to where I am by:

- Go to Home

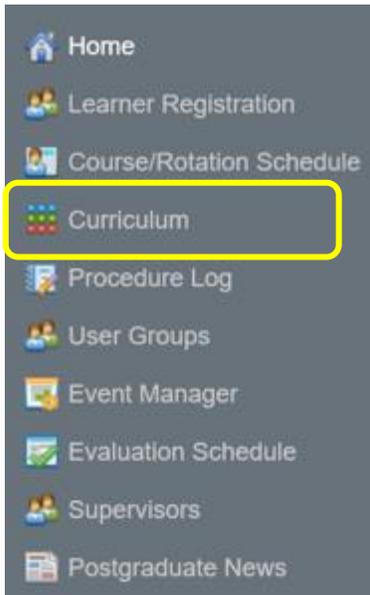


- Make sure you are in Admin Portal (will see “tiles”)

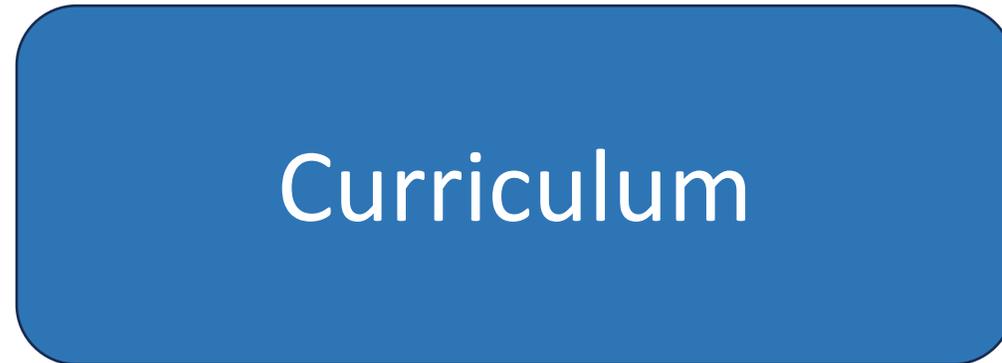
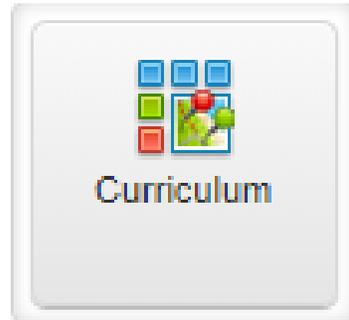


- Looking at top of my slide for navigation instructions



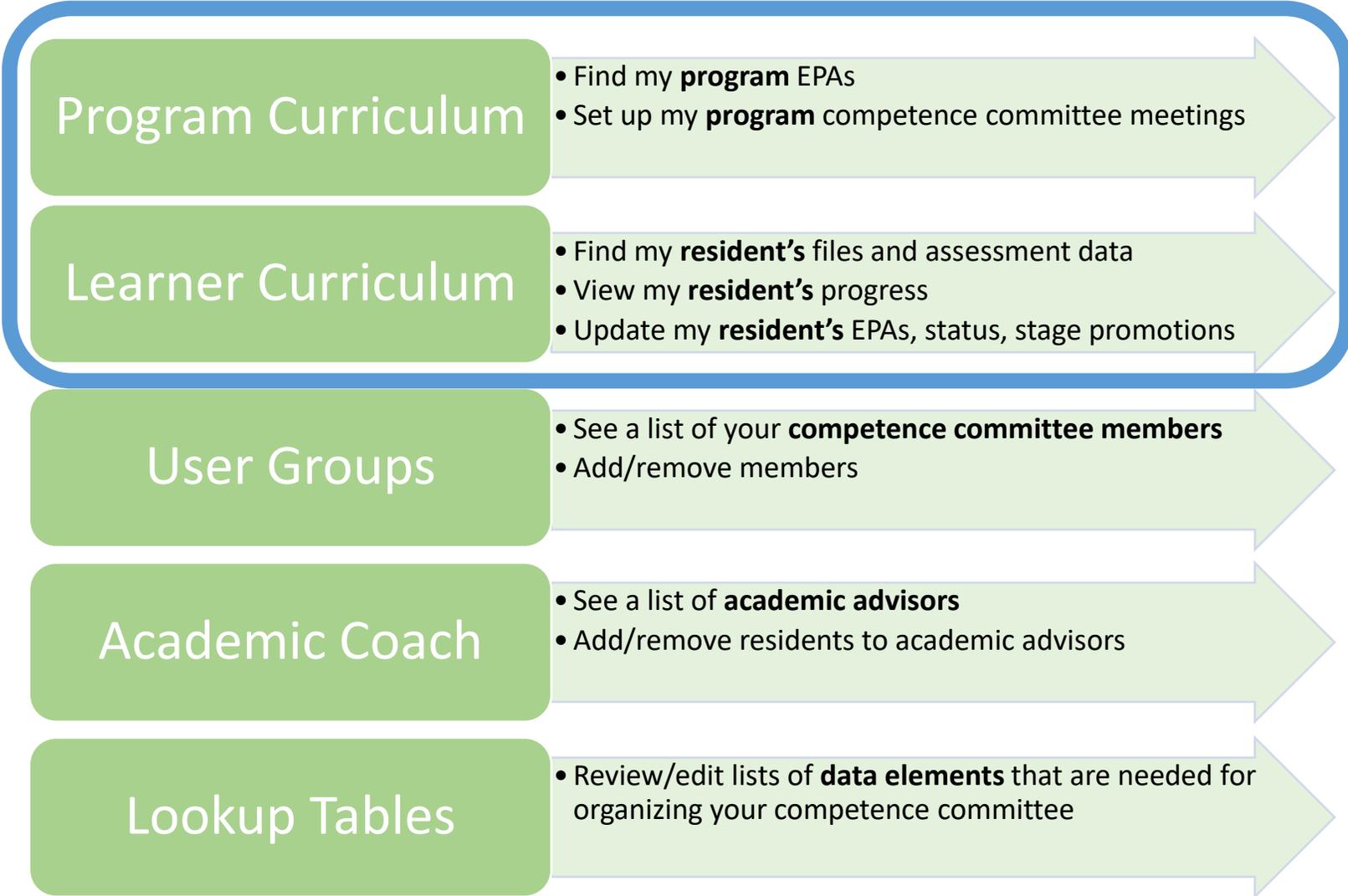
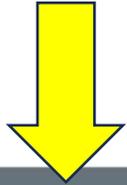


*Please go to:*



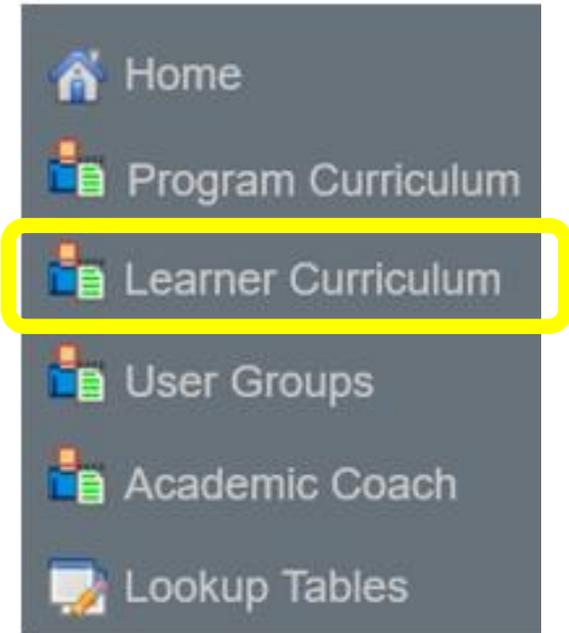


# Curriculum Module: key functions





*Please go to:*



Learner Curriculum



# Curriculum > Learner Curriculum

Lists all residents that you have viewing rights to

- 1 Can search by learner name
- 2 Click on the 3 dots to filter especially if you have viewing rights to residents from more than one program
- 3 Click on ^ at top of column to sort it
- 4 Click a name to display a resident's file

The screenshot shows the 'Learner Curriculum' interface. At the top, there is a search bar (1) and a filter icon (2). The table has columns for Learner, Training Program, Base Location, Learning Path, Training Level, Current Stage, Start of Stage, Stage Progress, and Overall Status. The 'Learner' column has a sort icon (3). The 'James, Motest' row is highlighted with a blue circle (4).

<input type="checkbox"/>	Learner	Training Program	Base Location	Learning Path	Training Level	Current Stage	Start of Stage	Stage Progress	Overall Status
<input type="checkbox"/>	<a href="#">Cartest, Chris</a>	Emergency Medicine		Emergency Medicine 2024	PGY5	Stage 3 - Core of Discipline	01-Jul-2024	0%	Progressing as expected
<input type="checkbox"/>	<a href="#">Giotest, Thomas</a>	Emergency Medicine		Emergency Medicine 2024		Stage 4 - Transition to Practice	01-Jun-2024	0%	Progressing as expected
<input type="checkbox"/>	<a href="#">James, Motest</a>	Emergency Medicine		Emergency Medicine 2024	PGY2	Stage 3 - Core of Discipline	01-Jul-2024	0%	Progressing as expected
<input type="checkbox"/>	<a href="#">Lintest, Ashley</a>	Emergency Medicine		Emergency Medicine 2024	PGY2	Stage 2 - Foundations of Discipline	01-Jul-2024	60%	Progressing as expected
<input type="checkbox"/>	<a href="#">Martest, Andi</a>	Emergency Medicine		Emergency Medicine 2024	PGY5	Stage 3 - Core of Discipline	01-Jul-2024	0%	Progressing as expected



# Curriculum > Learner Curriculum

- 1 Learning path = program and EPA version (resident will appear twice if in 2 different programs)
- 2 Current stage **\*\*\*we programmed their stage as of July 2024\*\*\***
- 3 Stage progress (how far along are they in the # successful EPAs needed) **\*\*\*data not transferred from eportfolio\*\*\***
- 4 Overall Status **\*\*\*we put everyone as Progressing as Expected\*\*\***

Brittany Redtest | Home > Curriculum > Learner Curriculum

Home | Program Curriculum | **Learner Curriculum** | User Groups | Academic Coach | Lookup Tables

Learner Curriculum										Total: 7
<input type="text"/> <input type="button" value="x"/> <input type="button" value="..."/>										<input type="button" value="Export"/>
<input type="checkbox"/>	Learner	Training Program	Base Location	Learning Path	Training Level	Current Stage	Start of Stage	Stage Progress	Overall Status	
<input type="checkbox"/>	Cartest, Chris	Emergency Medicine		Emergency Medicine 2024	PGY5	Stage 3 - Core of Discipline	01-Jul-2024	0%	Progressing as expected	
<input type="checkbox"/>	Giotest, Thomas	Emergency Medicine		Emergency Medicine 2024		Stage 4 - Transition to Practice	01-Jun-2024	0%	Progressing as expected	
<input type="checkbox"/>	James, Motest	Emergency Medicine		Emergency Medicine 2024	PGY2	Stage 3 - Core of Discipline	01-Jul-2024	0%	Progressing as expected	
<input type="checkbox"/>	Lintest, Ashley	Emergency Medicine		Emergency Medicine 2024	PGY2	Stage 2 - Foundations of Discipline	01-Jul-2024	60%	Progressing as expected	
<input type="checkbox"/>	Martest, Andi	Emergency Medicine		Emergency Medicine 2024	PGY5	Stage 3 - Core of Discipline	01-Jul-2024	0%	Progressing as expected	

# Filter – tips

If you frequently use the same filters, you can "pin" them to keep them

The image displays two screenshots of the 'Learner Curriculum' interface. The left screenshot shows the 'Filter' dialog box with 'Current Stage' selected and pinned. The right screenshot shows the 'Filter' dialog box with 'Current Stage' selected and unpinned. An orange arrow points from the 'Pin' button in the left screenshot to the 'Unpin' button in the right screenshot.

To clear a filter, click "Clear", then "Apply"

# Learners enrolled in 2 programs?

<input type="checkbox"/>	Altest, Anna	Surgical Foundations		Surgical Foundations 2021	PGY2	Stage 1 - Transition to Discipline	01-Jul-2023	45%	Progressing as expected
<input type="checkbox"/>	Altest, Anna	General Surgery		General Surgery 2020	PGY2	Stage 3 - Core of Discipline	01-Jul-2023	0%	Progressing as expected
<input type="checkbox"/>	Amatest, Rob	Surgical Foundations		Surgical Foundations 2021	PGY1	Stage 2 - Foundations of Discipline	01-Jul-2024	0%	Progressing as expected
<input type="checkbox"/>	Amatest, Rob	General Surgery		General Surgery 2020	PGY1	Stage 4 - Transition to Practice	01-Jul-2024	80%	Progressing as expected



Click a name to display a resident's file:

*Choose one of the "fake" resident profiles now (last name will end with "test")*

Brittany Redtest Home > Curriculum > Learner Curriculum

Home  
Program Curriculum  
**Learner Curriculum**  
User Groups  
Academic Coach  
Lookup Tables

**Learner Curriculum** Total: 7

Search [ ] [X] [...]

[Export]

<input type="checkbox"/>	Learner	Training Program	Base Location	Learning Path	Training Level	Current Stage	Start of Stage	Stage Progress	Overall Status
<input type="checkbox"/>	<a href="#">Cartest, Chris</a>	Emergency Medicine		Emergency Medicine 2024	PGY5	Stage 3 - Core of Discipline	01-Jul-2024	0%	Progressing as expected
<input type="checkbox"/>	<a href="#">Giotest, Thomas</a>	Emergency Medicine		Emergency Medicine 2024		Stage 4 - Transition to Practice	01-Jun-2024	0%	Progressing as expected
<input type="checkbox"/>	<a href="#">James, Motest</a>	Emergency Medicine		Emergency Medicine 2024	PGY2	Stage 3 - Core of Discipline	01-Jul-2024	0%	Progressing as expected
<input type="checkbox"/>	<a href="#">Lintest, Ashley</a>	Emergency Medicine		Emergency Medicine 2024	PGY2	Stage 2 - Foundations of Discipline	01-Jul-2024	60%	Progressing as expected
<input type="checkbox"/>	<a href="#">Martest, Andi</a>	Emergency Medicine		Emergency Medicine 2024	PGY5	Stage 3 - Core of Discipline	01-Jul-2024	0%	Progressing as expected



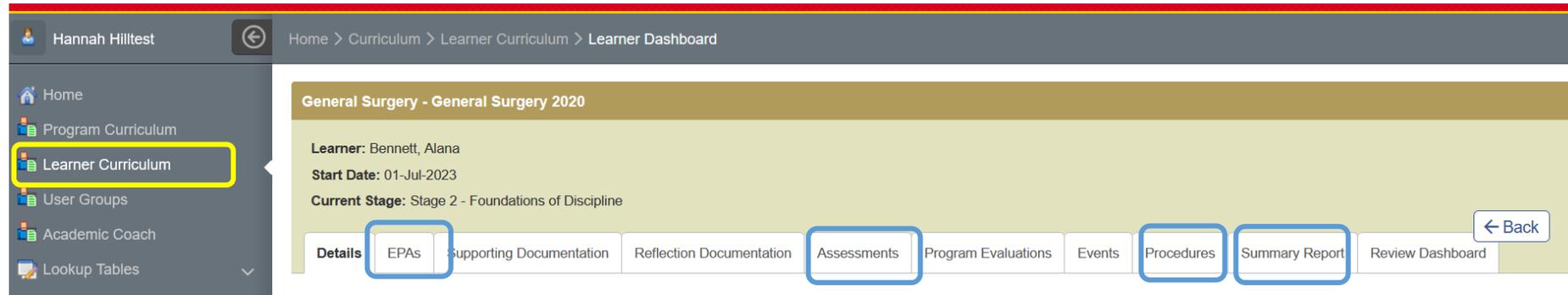
# Curriculum > Learner Curriculum Administrative View of Resident File

Looks similar to resident view, but you have one more tab than the resident has – **Details**  
Some tabs also have added **admin features**

The screenshot shows the user interface for the 'Administrative View of Resident File'. The top navigation bar includes the user name 'Hannah Hilltest' and a breadcrumb trail: 'Home > Curriculum > Learner Curriculum > Learner Dashboard'. A left-hand sidebar menu lists various options: Home, Program Curriculum, Learner Curriculum, User Groups, Academic Coach, and Lookup Tables. The main content area is titled 'General Surgery - General Surgery 2020' and displays the following information: 'Learner: Bennett, Alana', 'Start Date: 01-Jul-2023', and 'Current Stage: Stage 2 - Foundations of Discipline'. Below this information is a horizontal tabbed interface with the following tabs: 'Details', 'EPAs', 'Supporting Documentation', 'Reflection Documentation', 'Assessments', 'Program Evaluations', 'Events', 'Procedures', 'Summary Report', and 'Review Dashboard'. A 'Back' button is located at the top right of the tabbed area. The 'Details' and 'EPAs' tabs are highlighted with blue and green boxes, respectively, and the 'Review Dashboard' tab is highlighted with a green box.



# Resident Dashboard – Exploring Resident Performance



- **Details:** to update learner stage and status
- **EPAs:** EPA description and progress
- **Supporting Documentation:** upload documents for EPAs when applicable
- **Reflection Documentation:** personal documents. Can be private or public (visible by assigned PA, PD, CC members, Academic Coach)
- **Assessments:** can be filtered by activities, rotations, event and type
- **Program Evaluations:** summary of program evaluations (evaluations of preceptors and rotations) requested and filled *(to be implemented in July 2025)*
- **Events:** Learner/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 decisions.

The resident will see a similar view when they open their dashboard except the Details tab. Residents will have read-only views for some elements



# DEMO: Curriculum > Learner Curriculum > Learner Dashboard EPAs tab – Overview

**Note:** for 2024 launch the previous stages will appear as 0% and achieved as stage 1 below

<span>Details</span> <b><span>EPAs</span></b> <span>User Groups</span> <span>Supporting Documentation</span> <span>Reflection Documentation</span> <span>Assessments</span> <span>Program Evaluations</span> <span>Events</span> <span>Procedures</span> <span>Summary Report</span> <span>Review Dashboard</span> <span>← Back</span>							
-- All Data --							
Search: <input type="text"/>							
EPAs	Program Assessment	Individual Assessment	# of Forms	Level of Supervision/Entrustment	Status	Actions	Comments
> Stage 1 - Transition to Discipline [Emergency Medicine 2024]	0%				✓ Achieved	👍 Mark as Approved	
▼ Stage 2 - Foundations of Discipline / 01-Jul-2024 [Emergency Medicine 2024]	61%				🔄 In Progress	✓ Mark as Achieved	
> EPA 1. RESUSCITATION	100%		14	0 1 2 3 8	✓ Achieved	👍 Mark as Approved	📝 1 Note
> EPA 2. UNCOMPLICATED URGENT AND NON	4%		2	0 0 1 0 1	🔄 In Progress	✓ Mark as Achieved	📝 1 Note
> EPA 3. TEAM	40%		4	0 0 0 2 2	🔄 In Progress	✓ Mark as Achieved	+ Add note
> EPA 4. SA APPRAISAL	100%		4	1 0	🔄 Ready for Review	✓ Mark as Achieved	+ Add note
> Stage 3 - Core of Discipline [Emergency Medicine 2024]	2%				🔄 In Progress	✓ Mark as Achieved	
> Stage 4 - Transition to Practice [Emergency Medicine 2024]	0%				🔄 Pending	✓ Mark as Achieved	

- 1 Click > to left of EPA to open all context variables. Hover over an EPA to bring up:  These icons allow you to add custom requirements (just for this resident), see more info on the EPA, see performance data and see an update history
- 2 Shows the progress on an EPA or context variable – click on a progress bar to bring up more details
- 3 Percentage of manually created evaluations completed for this learner
- 4 # of forms completed – click on the number to pull up viewable list of all forms



# DEMO: Curriculum > Learner Curriculum > Learner Dashboard EPAs tab – Overview

← Back

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

-- All Data --

Search:

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

- 5 Shows # forms with each score level. Click on any level to view forms with that score
- 6 Status of the overall stage or EPA
- 7 Here you can adjust the status of the stage or EPA. Marking the stage complete does NOT automatically promote them. Promotion must be done separately in the details tab.
- 8 Notes can be added to the EPAs if needed. Notes can be shared or private and can have keyword “tags” attached if helpful



# DEMO: Curriculum > Learner Curriculum > Learner Dashboard Assessments tab

1 Click "All Evaluations" to filter by rotations, supervisors, assessment type, EPA, etc

Hannah Hilltest | Home > Curriculum > Learner Curriculum > Learner Dashboard

Learner: Cautest, Ryan  
 Start Date: 01-Jul-2024  
 Current Stage: Stage 2 - Foundations of Discipline

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

← Back

**Evaluations**

All Evaluations **1**

Legend: Template Record (blue), Hidden Evaluation (orange), Hidden Template (green)

**CBME Evaluation** Total: 3

Search:

Activity	Start Date	End Date	Evaluation	Trigger	Source	Created By	Evaluator	Evaluatee	Alerts	Status	Action
Acute Care Emergency Surgical Services PLC-Calgary	01-Jul-2024	28-Jul-2024	RC - FORM 2 Q FUNDAMENTAL SKILLS	Start of Rotation 16-Jul-2024	On-Demand	Lintest, Ashley 16-Jul-2024	Lintest, Ashley	Cautest, Ryan		✓ Completed 16-Jul-2024	View
Acute Care Emergency Surgical Services PLC-Calgary	01-Jul-2024	28-Jul-2024	RC - FORM 1 Q PRE-OP PREPARATION	Start of Rotation 23-Jul-2024	On-Demand	Cautest, Ryan 23-Jul-2024	Coletest, Joseph	Cautest, Ryan		✓ Completed 23-Jul-2024	View
Acute Care Emergency Surgical Services PLC-Calgary	01-Jul-2024	28-Jul-2024	RC - FORM 1 Q RECOGNIZE CRITICALLY ILL	Start of Rotation 23-Jul-2024	On-Demand	Cautest, Ryan 23-Jul-2024	Coletest, Joseph	Cautest, Ryan		✓ Completed 23-Jul-2024	View

https://medsis-uat.ucalgary.ca/dot/Curriculum/Admin#Programs



# DEMO: Curriculum > Learner Curriculum > Learner Dashboard Procedures tab

- 1 Displays logged procedures
- 2 Filter by linked EPA
- 3 Export the procedure log

Hannah Hilltest | Home > Curriculum > Learner Curriculum > Learner Dashboard

Home  
Program Curriculum  
**Learner Curriculum**  
User Groups  
Academic Coach  
Lookup Tables

**General Surgery - General Surgery 2020**

Learner: Cautest, Ryan  
Start Date: 01-Jul-2024  
Current Stage: Stage 2 - Foundations of Discipline

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

← Back

**Procedure Dashboard**

All Procedures **2**

**3** ↑ Export Procedures  
↑ Export Procedure Form Details

**Procedure Log** Total: 4

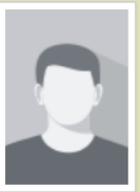
Procedure Name	Category Name	Procedure Program	Activity	Start Date	End Date	Evaluation	Trigger	Created By	Supervisor	Evaluatee	Status	Action	Expiry Date
ETV	Core 10 – CSF Disorder	Neurosurgery	<b>1</b> Neurosurgery-Calgary	23-Sep-2024	20-Oct-2024	Neurosurgery Procedure Log Q	Start of Rotation	Ahtest, John 24-Sep-2024		Ahtest, John	Submitted 24-Sep-2024	View	
Stereotactic procedures	Core 16 – Stereotactic	Neurosurgery	Pediatric Neurosurgery-Calgary	26-Aug-2024	22-Sep-2024	Neurosurgery Procedure Log Q	Start of Rotation 11-Sep-2024	Ahtest, John 11-Sep-2024		Ahtest, John	Submitted 11-Sep-2024	View	
Resection Peripheral Nerve Tumors	Core 21 – Resection Peripheral Nerve Tumors	Neurosurgery	Pediatric Neurosurgery-Calgary	26-Aug-2024	22-Sep-2024	Neurosurgery Procedure Log Q	Start of Rotation 11-Sep-2024	Ahtest, John 11-Sep-2024		Ahtest, John	Submitted 11-Sep-2024	View	



# DEMO: Curriculum > Learner Curriculum > Learner Dashboard Summary Report tab

Brittany Redtest | Home > Learner Registration > Learner Profile > Learning Path

Home | Learner Search | Learner Profile | Initial View | Training Lines | **Learning Path** | Academic Coach | Courses/Rotations | Notifications | Reports



**Lintest, Ashley**  
 Unique ID: 54695 , Student #: 54695 | Email: ashley.lintest@medsis3c.com  
 PGY2 , PGME , Emergency Medicine , 01-Jul-2024 / 30-Jun-2025  
 Advisor/Academic Coach: Graytest, John  
 Registered Active New Trainee

**Emergency Medicine - Emergency Medicine 2024**

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

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

[← Back](#)

**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](#)

1

1 Enter the report filters: dates range, stages, EPA, Procedure, Attendance ...

2 Click **Generate**

2



# DEMO : Curriculum > Learner Curriculum > Learner Dashboard Summary Report tab

- 1 Download the report in pdf
- 2 To close the report, close the browser tab, do not click on the log out icon 

MedSIS 3C Campus Edition  
CUMMING SCHOOL OF MEDICINE  
UNIVERSITY OF CALGARY

### Learner Summary Report

**UNIVERSITY OF CALGARY**  
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: 60%  
Stage Status: In Progress

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

Form	Completion	# of Forms	Breakdown	Status
RC - FORM 1	100%	14	0 1 2 3 8	Ready for Review

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

Form	Completion	# of Forms	Breakdown	Status
RC - FORM 1	100%	0	0 0 0 0 0	Ready for Review

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

Form	Completion	# of Forms	Breakdown	Status
RC - FORM 1	0%	1	0 0 1 0 0	Pending



# DEMO: Curriculum > Learner Curriculum > Learner Dashboard Review Dashboard tab

← Back

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

+ Assign Checklist

☰ **Competence Committee Preparation, Period: December 1st 2024**
👍 / 🗨️ Progressing as expected Total: 8

Search: 
+ Add Requirement

Sequence #	Requirement	Responsible for Requirement	Template Files	Files	Due Date	Step Complete	Last Updated
<span style="background-color: #007bff; color: white; border-radius: 50%; padding: 5px; font-weight: bold;">1</span>	1	Resident Self Reflection	Learner	Resident Self Reflection (U of C).docx	Resident Self Reflection (U of C)-filled.docx	<input checked="" type="checkbox"/>	16-Jul-2024
	2	Academic Advisor/Coach Report	Academic Coach	Academic Advisor_Coach Report (U of C).docx	Academic Advisor_Coach Report (U of C)-filled.docx	<input checked="" type="checkbox"/>	23-Jul-2024
	3	Supplementary Information from Program Administrator	Administrator	Supplementary Information from Program Administrator (U of C).docx	Supplementary Information from Program Administrator (U of C) - filled.docx	<input checked="" type="checkbox"/>	23-Jul-2024
	4	Scholarly Project Supervisor Update	Administrator	Scholarly Project Supervisor Update (U of C).docx	Scholarly Project Supervisor Update (U of C) - filled.docx	<input checked="" type="checkbox"/>	23-Jul-2024
	5	QI Project Supervisor Update	Administrator	QI Project Supervisor Update (U of C).docx	QI Project Supervisor Update (U of C) - filled.docx	<input checked="" type="checkbox"/>	23-Jul-2024
	6	Primary Reviewer Report	Competency Committee	Primary Reviewer Report (U of C).docx	Primary Reviewer Report (U of C)-filled.docx	<input checked="" type="checkbox"/>	23-Jul-2024
	7	Secondary Reviewer Report	Competency Committee	Secondary Reviewer Report (U of C).docx		<input checked="" type="checkbox"/>	24-Jul-2024
	8	Competence Committee Feedback to Resident	Competency Committee	Competence Committee Feedback to Resident (U of C).docx		<input type="checkbox"/>	

Showing 1 to 8 of 8 entries
Show  entries

First
Previous
1
Next
Last

Meeting Date:

Date Decision Ratified:

Overall Status:

Purpose of Meeting:

Outcome of Meeting:

Promotion:

Comments:

This is the competence committee review dashboard for this resident. Here you can:

- 1 View and update documents related to your CC meeting – called a **requirements checklist**
- 2 **Document** meeting details and decisions

This is all visible to resident!!!!

🕒 History Last modified on 24-Jul-2024, 10:23 by Brittany Redtest.

Save
Delete

# EXPLORE/PRACTICE

Stay logged in as yourself

Enter your test resident's dashboard in Learner Curriculum

Explore their performance data – EPA progress, stage progress, procedures

The screenshot shows a web application interface for a learner curriculum. At the top, a user profile for 'Hannah Hilltest' is visible. The breadcrumb trail indicates the path: Home > Curriculum > Learner Curriculum > Learner Dashboard. A left-hand navigation menu is present, with 'Learner Curriculum' highlighted in yellow. The main content area displays information for 'General Surgery - General Surgery 2020', including the learner's name 'Bennett, Alana', the start date '01-Jul-2023', and the current stage 'Stage 2 - Foundations of Discipline'. Below this information is a horizontal menu of tabs: Details, EPAs, Supporting Documentation, Reflection Documentation, Assessments, Program Evaluations, Events, Procedures, Summary Report, and Review Dashboard. The 'EPAs' and 'Procedures' tabs are highlighted with blue boxes. A 'Back' button is located in the top right corner of the main content area.

# Getting Ready for a Competence Committee Meeting

*Step 0 – Creating the meeting in MedSIS – we are teaching you how to do this in Session 2 (will generally be done by PAs)*

Step 1 – Review EPA progress and other assessments

Step 2 – Review checklist documents submitted by others

Step 3 – Complete and Upload any documents you are responsible for in the review checklists



# Step 1 – Exploring Resident Performance

## Curriculum > Learner Curriculum

- **Details:** to update learner stage and status
- **EPAs:** EPA description and progress
- **Supporting Documentation:** upload documents for EPAs when applicable
- **Reflection Documentation:** personal documents. Can be private or public (visible by assigned PA, PD, CC members, Academic Coach)
- **Assessments:** can be filtered by activities, rotations, event and type
- **Program Evaluations:** summary of program evaluations (evaluations of preceptors and rotations) requested and filled *(to be implemented in July 2025)*
- **Events:** Learner/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 decisions.



# Curriculum > Learner Curriculum > Learner Dashboard > EPAs tab STEP 1 – EPA review at a glance

<b>Stage 2 - Foundations of Discipline / 01-Jul-2024</b> [Emergency Medicine 2024]	61%					In Progress			
<b>EPA 1. RESUSCITATION</b>	100%	14	0	1	2	3	8	Achieved	1 Note
Collect 10 observations of achievement	100%								
At least 1 of each clinical presentation	100%								
<b>EPA 2. UNCOMPLICATED URGENT AND NON</b>	4%	2	0	0	1	0	1	In Progress	1 Note
Collect 30 observations of achievement	3%								
At least 1 of each presentation category	10%								
At least 5 pediatric presentations	0%								
<b>EPA 3. TEAM</b>	40%	4	0	0	0	2	2	In Progress	+ Add note
Collect 10 observations of achievement	40%								
At least 5 informed by input from a non-physician member of the ED team (RN, RT, Social Worker etc)	40%								
<b>EPA 4. SA APPRAISAL</b>	100%	4	1	0				Ready for Review	+ Add note
Collect 1 submission of satisfactory achievement.	100%								

**EPA Status**

- **Pending (automatic)** = No progress has been made on this EPA/Stage
- **In Progress (automatic)** = At least one form has been completed for this EPA/Stage
- **Ready to Review (automatic)** = The minimum requirements for this EPA/Stage have been met



# Step 2 – Review Documents uploaded by others

## Curriculum > Learner Curriculum > Review Dashboard

[Details](#)
[EPAs](#)
[Supporting Documentation](#)
[Reflection Documentation](#)
[Assessments](#)
[Program Evaluations](#)
[Events](#)
[Procedures](#)
[Summary Reports](#)
[Review Dashboard](#)
[← Back](#)

[+ Assign Checklist](#)

☰ Competence Committee Preparation, Period: December 1st 2024
 
 👍 / 👤 Progressing as expected Total: 8

Search:  [+ Add Requirement](#)

Sequence #	Requirement	Responsible for Requirement	Template Files	Files	Due Date	Step Complete	Last Updated
1	Resident Self Reflection	Learner	Resident Self Reflection (U of C).docx	Resident Self Reflection (U of C)-filled.docx		<input checked="" type="checkbox"/>	16-Jul-2024
2	Academic Advisor/Coach Report	Academic Coach	Academic Advisor_Coach Report (U of C).docx	Academic Advisor_Coach Report (U of C)-filled.docx		<input checked="" type="checkbox"/>	23-Jul-2024
3	Supplementary Information from Program Administrator	Administrator	Supplementary Information from Program Administrator (U of C).docx	Supplementary Information from Program Administrator (U of C) - filled.docx		<input checked="" type="checkbox"/>	23-Jul-2024
4	Scholarly Project Supervisor Update	Administrator	Scholarly Project Supervisor Update (U of C).docx	Scholarly Project Supervisor Update (U of C) - filled.docx		<input checked="" type="checkbox"/>	23-Jul-2024
5	QI Project Supervisor Update	Administrator	QI Project Supervisor Update (U of C).docx	QI Project Supervisor Update (U of C) - filled.docx		<input checked="" type="checkbox"/>	23-Jul-2024
6	Primary Reviewer Report	Competency Committee	Primary Reviewer Report (U of C).docx	Primary Reviewer Report (U of C)-filled.docx		<input checked="" type="checkbox"/>	23-Jul-2024
7	Secondary Reviewer Report	Competency Committee	Secondary Reviewer Report (U of C).docx			<input checked="" type="checkbox"/>	24-Jul-2024
8	Competence Committee Feedback to Resident	Competency Committee	Competence Committee Feedback to Resident (U of C).docx			<input type="checkbox"/>	

Showing 1 to 8 of 8 entries Show 25 entries First Previous 1 Next Last

Meeting Date:

Date Decision Ratified:

Overall Status:

Purpose of Meeting:

Outcome of Meeting:

Promotion:

Comments:

Click any file to download/view

[History](#) Last modified on 24-Jul-2024, 10:23 by Brittany Redtest.
 
 Save Delete



# Step 3 – Completing/Uploading documents

Curriculum > Learner Curriculum > Review Dashboard

Emergency Medicine - Emergency Medicine 2024

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

← Back

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

Competence Committee Preparation, Period: December 1st 2024 Total: 8

Search:

Sequence #	Requirement	Responsible for Requirement	Template Files	Files	Due Date	Step Complete	Last Updated
1	Resident Self Reflection	Learner	Resident Self Reflection (U of C).docx	Resident Self Reflection (U of C)-filled.docx		<input checked="" type="checkbox"/>	16-Jul-2024
2	Academic Advisor/Coach Report	Academic Coach	Academic Advisor_Coach Report (U of C).docx			<input type="checkbox"/>	
3	Supplementary Information from Program Administrator	Administrator	Supplementary Information from Program Administrator (U of C).docx			<input type="checkbox"/>	
4	Scholarly Project Supervisor Update	Administrator	Scholarly Project Supervisor Update (U of C).docx			<input type="checkbox"/>	
5	QI Project Supervisor Update	Administrator	QI Project Supervisor Update (U of C).docx			<input type="checkbox"/>	
6	Primary Reviewer Report	Competency Committee	Primary Reviewer Report (U of C).docx			<input type="checkbox"/>	
7	Secondary Reviewer Report	Competency Committee	Secondary Reviewer Report (U of C).docx			<input type="checkbox"/>	
8	Competence Committee Feedback to Resident	Competency Committee	Competence Committee Feedback to Resident (U of C).docx			<input type="checkbox"/>	

Showing 1 to 8 of 8 entries Show 25 entries

First Previous 1 Next Last

**Careful: This is all visible to resident**

The review dashboard displays documents related to a given Competence Committee Meeting

- 1 Name of Requirement (will be blue if you have permission to upload it – click it to open dialogue box)
- 2 Indicates who is responsible to completing document
- 3 Blank template (click to download)
- 4 Drop in box to upload completed file(s)
- 5 Step complete (= files are final/ ready for review)



# Step 3 – Completing/Uploading documents

Curriculum > Learner Curriculum > Review Dashboard

Emergency Medicine - Emergency Medicine 2024

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

← Back

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

Competence Committee Preparation, Period: December 1st 2024 Total: 8

Search:

Sequence #	Requirement	Responsible for Requirement	Template Files	Files	Due Date	Step Complete	Last Updated
1	Resident Self Reflection	Learner	Resident Self Reflection (U of C).docx	Resident Self Reflection (U of C)-filled.docx		<input checked="" type="checkbox"/>	16-Jul-2024
2	Academic Advisor/Coach Report	Academ				<input type="checkbox"/>	
3	Supplementary Information from Program Administrator	Adminis				<input type="checkbox"/>	
4	Scholarly Project Supervisor Update	Adminis				<input type="checkbox"/>	
5	QI Project Supervisor Update	Adminis				<input type="checkbox"/>	
6	Primary Reviewer Report	Compet				<input type="checkbox"/>	
7	Secondary Reviewer Report	Compet				<input type="checkbox"/>	
8	Competence Committee Feedback to Resident	Compet				<input type="checkbox"/>	

Showing 1 to 8 of 8 entries Show 25 entries

**Requirement**

Requirement\*: Resident Self Reflection

Responsible for Requirement\*: Learner

Due Date: N/A

Sequence #: 1

Step Complete: **YES** 4

Template Files:

Resident Self Reflection (U of C).docx 2

Files:

Drop files or click to upload 3

Resident Self Reflection (U of C)-file... x

Save Cancel

The review dashboard displays documents related to a given Competence Committee Meeting

- 1 Click on requirement if you are responsible for it – in blue
- 2 Click on Blank template (click to download)
- 3 Drop in box to upload completed file(s)
- 4 Step complete (= files are final/ready for review)

# What about the data in RC ePortfolio?

- The data in **ePortfolio** is **NOT being transferred** over to MedSIS
- After your launch date, **NO NEW DATA** into ePortfolio
- Within a week of your launch date, **residents** should **download** an **Observation Summary Report from ePortfolio** so they will have a record of their EPA progress in their current stage
- We advise that **Academic Advisors** do the **same**
- PGME is downloading the raw data and an OSR for every active resident – it will be available to the PA and PD via secure program sharepoint site (you can download your own if you want quicker access)
- For upcoming meetings you will need to combine the EPA data from ePort (via OSR/CBD Dashboard) and MedSIS data

# Options for making this easier

- If a resident has relatively few EPAs in their current stage in eportfolio, they could just enter them into MedSIS – then their MedSIS dashboard will be accurate
- If your residents already use their own spreadsheets to track EPAs – have them continue to do this – use the MedSIS reports to make adding to this spreadsheet easier – then they can upload the spreadsheet.

## After (or during) a Meeting

Step 1 – Mark EPAs and Stages achieved on EPA tab

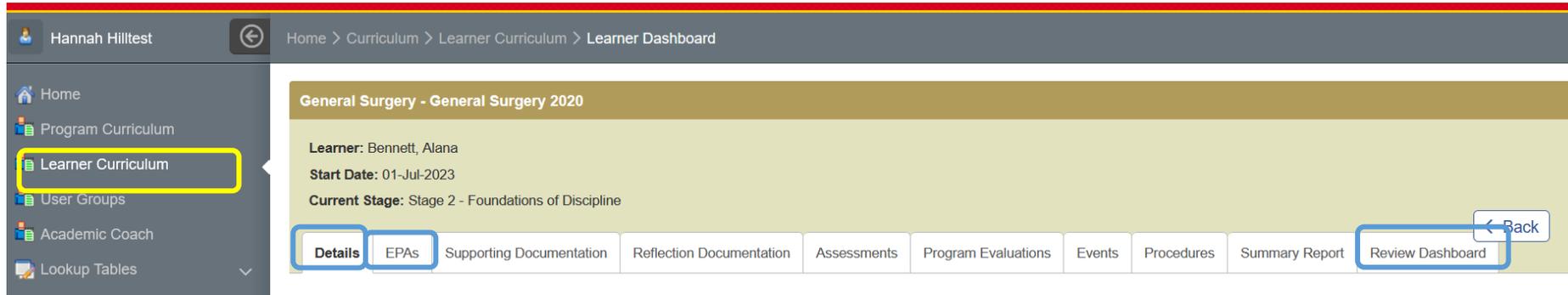
Step 2 – Record CC details and recommendations on Review Dashboard Tab

Step 3 – When decisions finalized (or ratified if needed), update status and promote in Details tab

Step 4 – Upload your Feedback to the Resident



# Entering Competence Committee Decisions



- **Details:** to update learner stage and status
- **EPAs:** EPA description and progress
- **Supporting Documentation:** upload documents for EPAs when applicable
- **Reflection Documentation:** personal documents. Can be private or public (visible by assigned PA, PD, CC members, Academic Coach)
- **Assessments:** can be filtered by activities, rotations, event and type
- **Program Evaluations:** summary of program evaluations (evaluations of preceptors and rotations) requested and filled *(To be implemented in July 2025)*
- **Events:** Learner/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 decisions.

The resident will see a similar view when they open their dashboard except the Details tab. Residents will have read-only views for some elements



# Curriculum > Learner Curriculum > Learner Dashboard > EPA tab

## Step 1 – Mark EPAs and Stages as achieved as needed

Brittany Redtest | Home > Curriculum > Learner Curriculum > Learner Dashboard

Emergency Medicine - Emergency Medicine 2024

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

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

← Back

-- All Data -- **1**

Search:

EPAs	Program Assessment	Individual Assessment	# of Forms	Level of Supervision/Entrustment	Status	Actions <b>2</b>	Comments
> Stage 1 - Transition to Discipline [Emergency Medicine 2024]	0%				✓ Achieved	Mark as Approved	
∨ Stage 2 - Foundations of Discipline / 01-Jul-2024 [Emergency Medicine 2024]	60%				⦿ In Progress	Mark as Achieved	
> EPA 1. RESUSCITATION	100%	14	0 1 2 3 8	⦿ Ready for Review	Mark as Achieved   Mark as Approved	1 Note	
> EPA 2. UNCOMPLICATED URGENT AND NON	0%	1	0 0 1 0 0	⦿ Pending	Mark as Achieved <b>3</b>	+ Add note	

- 1 Open to the tab **EPAs**
- 2 Select the dropdown menu on the Action column
- 3 Click on **Mark as Achieved** when applicable

### Actions:

- **Achieved (updated manually)** = The Competence Committee has decided this EPA/Stage is Achieved.
- **Approved (updated manually)** = Ratified by RPC (optional - rarely done for EPAs/Stages – so you can just leave things as “Achieved” unless your TOR involve RPC ratification – then feel free to use the “Approved” setting)



# Curriculum > Learner Curriculum > Learner Dashboard > Review Dashboard

## Step 2 – Record details and CC recommendations

Details | EPAs | Supporting Documentation | Reflection Documentation | Assessments | Program Evaluations | Events | Procedures | Summary Report | **Review Dashboard** | [← Back](#)

[+ Assign Checklist](#)

☰ Competence Committee Preparation, Period: December 1st 2024 👍 / 🗨️ **Progressing as expected** Total: 8

Search:  [+ Add Requirement](#)

Sequence #	Requirement	Responsible for Requirement	Template Files	Files	Due Date	Step Complete	Last Updated
1	Resident Self Reflection	Learner	<a href="#">Resident Self Reflection (U of C).docx</a>	<a href="#">Resident Self Reflection (U of C)-filled.docx</a>		<input checked="" type="checkbox"/>	16-Jul-2024
2	Academic Advisor/Coach Report	Academic Coach	<a href="#">Academic Advisor_Coach Report (U of C).docx</a>	<a href="#">Academic Advisor_Coach Report (U of C)-filled.docx</a>		<input checked="" type="checkbox"/>	23-Jul-2024
3	Supplementary Information from Program Administrator	Administrator	<a href="#">Supplementary Information from Program Administrator (U of C).docx</a>	<a href="#">Supplementary Information from Program Administrator (U of C) - filled.docx</a>		<input checked="" type="checkbox"/>	23-Jul-2024
4	Scholarly Project Supervisor Update	Administrator	<a href="#">Scholarly Project Supervisor Update (U of C).docx</a>	<a href="#">Scholarly Project Supervisor Update (U of C) - filled.docx</a>		<input checked="" type="checkbox"/>	23-Jul-2024
5	QI Project Supervisor Update	Administrator	<a href="#">QI Project Supervisor Update (U of C).docx</a>	<a href="#">QI Project Supervisor Update (U of C) - filled.docx</a>		<input checked="" type="checkbox"/>	23-Jul-2024
6	Primary Reviewer Report	Competency Committee	<a href="#">Primary Reviewer Report (U of C).docx</a>	<a href="#">Primary Reviewer Report (U of C)-filled.docx</a>		<input checked="" type="checkbox"/>	23-Jul-2024
7	Secondary Reviewer Report	Competency Committee	<a href="#">Secondary Reviewer Report (U of C).docx</a>			<input checked="" type="checkbox"/>	24-Jul-2024
8	Competence Committee Feedback to Resident	Competency Committee	<a href="#">Competence Committee Feedback to Resident (U of C).docx</a>			<input type="checkbox"/>	

Showing 1 to 8 of 8 entries Show 25 entries First Previous 1 Next Last

Meeting Date:

Date Decision Ratified:

Overall Status:

Purpose of Meeting:

Outcome of Meeting:

Promotion:

Comments:

Record what happened in meeting

[History](#) Last modified on 24-Jul-2024, 10:23 by Brittany Redtest.

[Save](#) [Delete](#)



# Curriculum > Learner Curriculum > Learner Dashboard > Details tab Step 3 – Enter official promotion and status

Hannah Hilltest | Home > Curriculum > Learner Curriculum > Learner Dashboard

Home  
Program Curriculum  
**Learner Curriculum**  
User Groups  
Academic Coach  
Lookup Tables

**General Surgery - General Surgery 2020**

Learner: Bennett, Ellie  
Start Date: 01-Jul-2022  
Current Stage: Stage 2 - Foundations of Discipline

Details | EPAs | Supporting Documentation | Reflection Documentation | Assessments | Pro

Start Date\*: 01-Jul-2022  
End Date:   
Current Stage\*: Stage 2 - Foundations of Discipline  
Start of Current Stage\*: 01-Jul-2024  
Official:  YES  
Overall Status\*: Progressing as expected

Learning Path Start/End dates

Promote to new stage here  
Add start date of stage  
If system detects new version, will promote to new version

Ignore this – means official CBD resident (keep at yes)

Set Overall Status

**!** All CC members are able to edit this tab. We recommend limiting this task to either the PA, PD or CC Chair (or specific delegate)



# Curriculum > Learner Curriculum > Learner Dashboard > Review Dashboard Step 4 – Upload your Feedback to Resident

Details | EPAs | Supporting Documentation | Reflection Documentation | Assessments | Program Evaluations | Events | Procedures | Summary Report | **Review Dashboard** | [← Back](#)

[+ Assign Checklist](#)

☰ Competence Committee Preparation, Period: December 1st 2024 👍 / 🗨️ **Progressing as expected** Total: 8

Search:  [+ Add Requirement](#)

Sequence #	Requirement	Responsible for Requirement	Template Files	Files	Due Date	Step Complete	Last Updated
1	Resident Self Reflection	Learner	<a href="#">Resident Self Reflection (U of C).docx</a>	<a href="#">Resident Self Reflection (U of C)-filled.docx</a>		<input checked="" type="checkbox"/>	16-Jul-2024
2	Academic Advisor/Coach Report	Academic Coach	<a href="#">Academic Advisor_Coach Report (U of C).docx</a>	<a href="#">Academic Advisor_Coach Report (U of C)-filled.docx</a>		<input checked="" type="checkbox"/>	23-Jul-2024
3	Supplementary Information from Program Administrator	Administrator	<a href="#">Supplementary Information from Program Administrator (U of C).docx</a>	<a href="#">Supplementary Information from Program Administrator (U of C) - filled.docx</a>		<input checked="" type="checkbox"/>	23-Jul-2024
4	Scholarly Project Supervisor Update	Administrator	<a href="#">Scholarly Project Supervisor Update (U of C).docx</a>	<a href="#">Scholarly Project Supervisor Update (U of C) - filled.docx</a>		<input checked="" type="checkbox"/>	23-Jul-2024
5	QI Project Supervisor Update	Administrator	<a href="#">QI Project Supervisor Update (U of C).docx</a>	<a href="#">QI Project Supervisor Update (U of C) - filled.docx</a>		<input checked="" type="checkbox"/>	23-Jul-2024
6	Primary Reviewer Report	Competency Committee	<a href="#">Primary Reviewer Report (U of C).docx</a>	<a href="#">Primary Reviewer Report (U of C)-filled.docx</a>		<input checked="" type="checkbox"/>	23-Jul-2024
7	Secondary Reviewer Report	Competency Committee	<a href="#">Secondary Reviewer Report (U of C).docx</a>			<input checked="" type="checkbox"/>	24-Jul-2024
8	<b>Competence Committee Feedback to Resident</b>	Competency Committee	<a href="#">Competence Committee Feedback to Resident (U of C).docx</a>			<input type="checkbox"/>	

Showing 1 to 8 of 8 entries Show 25 entries First Previous 1 Next Last

Meeting Date:

Date Decision Ratified:

Overall Status:

Purpose of Meeting:

Outcome of Meeting:

Promotion:

Comments:

After the meeting, upload your formal feedback to resident here – they will see it immediately

[History](#) Last modified on 24-Jul-2024, 10:23 by Brittany Redtest.

[Save](#) [Delete](#)

# DEMO – entering CC decisions

- Demo marking EPA as achieved
- Demo marking stage achieved in EPA tab
- Demo entering meeting details in Review Dashboard tab
- Demo updating info in details tab
- Demo downloading Resident Feedback template and uploading it

# EXPLORE/PRACTICE

Stay logged in as yourself

Enter your test resident's dashboard in Learner Curriculum

**EPA tab:** Adjust some EPAs as achieved

**Review Dashboard:** enter some meeting details

**Details tab:** Promote the resident and adjust their status

Hannah Hilltest Home > Curriculum > Learner Curriculum > Learner Dashboard

General Surgery - General Surgery 2020

Learner: Bennett, Alana  
Start Date: 01-Jul-2023  
Current Stage: Stage 2 - Foundations of Discipline

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

Back

# EXPLORE/PRACTICE

- 1 Review Dashboard: click on template file “Comp Com Feedback...” to download to the Downloads file on your training computer – it will be read only on your training computer - we will use this file to demo upload functions
- 2 Pretend you edited it, try uploading it from the Downloads file as if it were a completed document

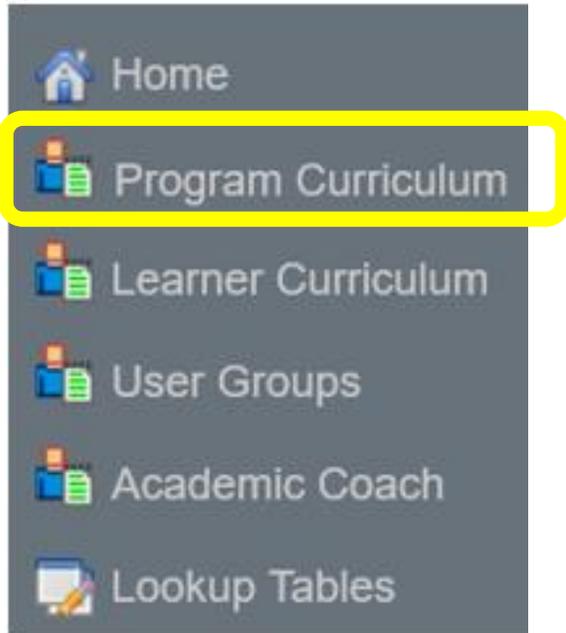
The screenshot shows a web application interface for curriculum management. The user is logged in as Ashley Lintest. The breadcrumb trail is Home > Curriculum > Learner Curriculum > Learner Dashboard. The sidebar on the left has 'Learner Curriculum' highlighted. The main content area has a 'Review Dashboard' tab selected. Below the tabs, there is a search bar with a '1' next to it, and a '+ Add Requirement' button. A table displays the following data:

Sequence #	Requirement	Responsible for Requirement	Template Files	Files	Due Date	Step Complete	Last Updated
1	Competence Committee Summary	Competency Committee	Competence Committee Feedback to Resident (U of C) (1).docx			<input type="checkbox"/>	

Below the table, there are fields for 'Meeting Date', 'Date Decision Ratified', 'Overall Status', 'Purpose of Meeting', 'Outcome of Meeting', and 'Promotion', each with a dropdown menu. A 'Comments' field is also present at the bottom.



*Please go to:*



Program Curriculum



# Curriculum > Program Curriculum

Hannah Hilltest

Home > Curriculum > Program Curriculum

Home

**Program Curriculum**

Learner Curriculum

User Groups

Academic Coach

Lookup Tables

**Programs**

Search:

Description	Code	Tr. Level Type
Anesthesiology	ANESTH	Resident
Cardiac Surgery	CARDSX	Resident
> Cardiology - Adult	CARDIO	Resident
Child and Adolescent Psychiatry	CAPSY	Resident
Clinical Pharmacology and Toxicology	TOX	Resident
Clinician Investigator Program	CIP	Resident
Colorectal Surgery	COLRSX	Resident
Critical Care Medicine	CCM	Resident
Cytopathology AFC	CYTAFC	Fellow
Dermatology	DERM	Resident
Developmental Pediatrics	DEVPED	Resident

1 Select your program

2 You may click it directly or do a search



# Curriculum: Program Curriculum > Details

Hannah Hilltest Home > Curriculum > Program Curriculum > Edit Program

Home  
Program Curriculum  
Learner Curriculum  
User Groups  
Academic Coach  
Lookup Tables

Emergency Medicine

Department: Emergency Medicine  
Training Level Type: Resident

Details Learning Path Requirement Checklist

Parent: N/A

Description: Emergency Medicine

Code: EMERG

Department: Emergency Medicine

Nr. of Years: 5

Training Level Type: Resident

History

- Details tab:

- The program name in the system
- The program CODE in the system
- The number of years in your training program



# Curriculum: Program Curriculum > Learning Path

Hannah Hilltest Home > Curriculum > Program Curriculum > Edit Program

- Home
- Program Curriculum**
- Learner Curriculum
- User Groups
- Academic Coach
- Lookup Tables

**Emergency Medicine**

Department: Emergency Medicine  
Training Level Type: Resident

Details **Learning Path** Requirement Checklist

**Emergency Medicine 2024**

## Program's EPA Suite versions

Note: most programs will only have a single active version, but some have 2 versions active

**Obstetrics and Gynecology**

Department: Obstetrics and Gynecology  
Training Level Type: Resident

Details **Learning Path** Requirement Checklist

**Obstetrics and Gynecology 2021**

**Obstetrics and Gynecology 2024**



# Curriculum: Program Curriculum > Learning Path

Hannah Hilltest   Home > Curriculum > Program Curriculum > Edit Program

- Home
- Program Curriculum
- Learner Curriculum
- User Groups
- Academic Coach
- Lookup Tables

### Emergency Medicine

**Department:** Emergency Medicine  
**Training Level Type:** Resident

Details   **Learning Path**   Requirement Checklist

Emergency Medicine 2024

*Click to enter your learning path if you want to follow along*



# Curriculum: Program Curriculum > Learning Path Within the EPA Suite: click on an EPA

- Home
- Program Curriculum**
- Learner Curriculum
- User Groups
- Academic Coach
- Lookup Tables

## Emergency Medicine

Department: Emergency Medicine

Training Level Type: Resident

Details

**Learning Path**

Requirement Checklist

- 1 Click on the EPA name to open details
- 2 Click on the arrow if the EPA has more than one part

### Emergency Medicine 2024

Search:  ✕

Name	Requirements	
<b>Stage 1 - Transition to Discipline</b>		
<b>1</b> BASIC LIFE SUPPORT	Direct observation by supervising physician or resident in Core or TTP Collect 8 observations of achievement - At least 1 of each clinical presentation	2
HISTORY AND PHYSICAL	Direct and indirect observation by supervising physician or resident in Core or TTP (e.g., case discussion, review of the completed medical record) Collect 20 observations of achievement - At least 5 observations of each of the 4 clinical presentations listed - At least 2 direct observations of each of the 4 clinical presentations listed	9
<b>2</b> > COMMUNICATION	Direct observation and case discussion by supervising physician using informal multi-source feedback data Collect 10 observations of achievement	2



# Curriculum: Program Curriculum > Learning Path > EPA

The screenshot shows a web application interface for curriculum management. At the top, the user is identified as Hannah Hilltest, and the breadcrumb trail is Home > Curriculum > Program Curriculum > Edit Program. A left-hand navigation menu includes Home, Program Curriculum (highlighted with a yellow box), Learner Curriculum, User Groups, Academic Coach, and Lookup Tables. The main content area displays a list of curriculum items under 'Stage 1 - Transition to Discipline', including 'BASIC LIFE SUPPORT' and 'HISTORY AND PHYSICAL'. A red 'Edit Item' button is positioned over the 'HISTORY AND PHYSICAL' item, with a blue arrow pointing to it. Below the button, the details for 'HISTORY AND PHYSICAL' are shown, including a title, requirements, and a set of tabs for 'Details', 'Milestones', 'Contextual Variables', and 'Requirements'. The 'Details' tab is selected and highlighted with a blue box. At the bottom, the parent item is 'Stage 1 - Transition to Discipline' and the name is 'HISTORY AND PHYSICAL'.

- Click on EPA to see definition:
  - Details
  - Milestones
  - Contextual Variables
  - Requirements



# Curriculum: Program Curriculum > Learning Path > EPA Details tab

Stage 3 - Core of Discipline

CRITICALLY ILL

CRITICALLY INJURED



- Details tab shows:
  - Stage
  - Short name
  - Long name
  - Key features
  - Min score (if blank = 4)
  - Form used
  - RC Specified requirements
  - **Ability to preview form**

✎ Edit Item

CRITICALLY INJURED

**Title:** Resuscitating and coordinating care for multi-system or critically injured trauma patients

**Requirements:** Direct observation by supervising emergency physician, trauma team leader, or resident in TTP

Collect 25 observations of achievement:

- At least 5 adults with penetrating trauma
- At least 10 adults in a clinical (not simulation) setting
- At least 5 pediatric presentations

Details

Milestones

Contextual Variables

Requirements

<b>Parent:</b>	Stage 3 - Core of Discipline
<b>Name:</b>	CRITICALLY INJURED
<b>Title:</b>	Resuscitating and coordinating care for multi-system or critically injured trauma patients
<b>Sequence #:</b>	2
<b>Key Features:</b>	- The focus of this EPA is on leading a team of health care professionals, including physicians from other specialties, in the assessment and management of a patient with single system or potential for multi-organ system trauma.
<b>Minimum Score for Achieved EPA:</b>	
<b>Form:</b>	RC - FORM 1
<b>Linked To:</b>	N/A
<b>Requirements:</b>	Direct observation by supervising emergency physician, trauma team leader, or resident in TTP Collect 25 observations of achievement: - At least 5 adults with penetrating trauma - At least 10 adults in a clinical (not simulation) setting - At least 5 pediatric presentations - At least 10 adults with critical or severe injuries - At least 10 occasions functioning as a trauma team leader

🔍 Preview



# Curriculum: Program Curriculum > Learning Path > EPA Milestones tab

Details **Milestones** Contextual Variables Requirements

Selected Milestones	Sequence
Collaborator 1.2 Collaborate as needed with other health care professionals	10
Communicator 2.3 Seek and synthesize relevant information from other sources, including the patient's family, other physicians, first responders, and other health professionals	7
Communicator 3.1 Communicate bad news to the family and patient effectively	8
Communicator 5.1 Maintain clear, concise, and accurate resuscitation records	9
Leader 2.1 Practice the principles of crisis resource management in leading a health care team	11

Showing 1 to 5 of 13 entries



# Curriculum: Program Curriculum > Learning Path > EPA Contextual Variables tab

**Edit Item** [Close]

**CRITICALLY INJURED**

**Title:** Resuscitating and coordinating care for multi-system or critically injured trauma patients

**Requirements:** Direct observation by supervising emergency physician, trauma team leader, or resident in TTP

Collect 25 observations of achievement:

- At least 5 adults with penetrating trauma
- At least 10 adults in a clinical (not simulation) setting
- At least 5 pediatric presentations

Selected Variables	Selected Options
Clinical presentation	<input type="button" value="other"/> <input type="button" value="blunt trauma"/> <input type="button" value="penetrating trauma"/>
Critical or severe injuries	<input type="button" value="no"/> <input type="button" value="yes"/>
Patient demographic	<input type="button" value="senior"/> <input type="button" value="infant"/> <input type="button" value="youth"/> <input type="button" value="adult"/> <input type="button" value="child"/>
Role	<input type="button" value="participant"/> <input type="button" value="leader"/>
Setting	<input type="button" value="other"/> <input type="button" value="simulation"/> <input type="button" value="emergency department"/>

Showing 1 to 5 of 5 entries

Context variables collected on the form

**Note:** These can be modified by PGME upon request from PD or CC Chair.



## EPA/context variable requirements

Details Milestones Contextual Variables **Requirements**

**Description**

- Collect 25 observations of achievement
- At least 5 adults with penetrating trauma
- At least 10 adults in a clinical (not simulation) setting
- At least 5 pediatric presentations
- At least 10 adults with critical or severe injuries
- At least 10 occasions functioning as a trauma team leader

The learner progress dashboard is based on these requirements.

**Note:** *These can be modified by PGME upon request from PD or CC Chair.*



# Curriculum: Program Curriculum > Learning Path > EPA Requirements tab

## UNCOMPLICATED URGENT AND NON

**Title:** Assessing and managing patients with uncomplicated urgent and non-urgent emergency department presentations

**Requirements:** Direct observation by supervising physician or resident in Core or TTP supported by case discussion and review of the medical record

Collect 30 observations of achievement

- A variety of presentations

- At least 5 pediatric presentations

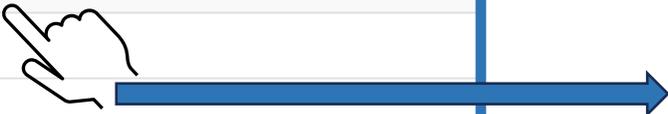
- Details
- Milestones
- Contextual Variables
- Requirements**

### Description

Collect 30 observations of achievement

At least 1 of each presentation category

At least 5 pediatric presentations



Friendly description: **At least 1 of each presentation category**

Contextual Variables:

Contextual Variable	Options
Presentation Category	CNS
	CVS
	Resp
	GI
	Urinary Tract
	Oncology
	MSK
	ID
	Surgical
	Endo

We created criteria to satisfy "variety"

**Note:** These can be modified by PGME upon request from PD or CC Chair



# WARNING – this is a bit confusing

- Close the EPA “Edit item” pop up ✖
- We are now leaving the “Learning Path” and going to the “Requirement Checklist”
- \*\*\*Requirements tab in your EPA pop up window completely unrelated to Requirement Checklist tab



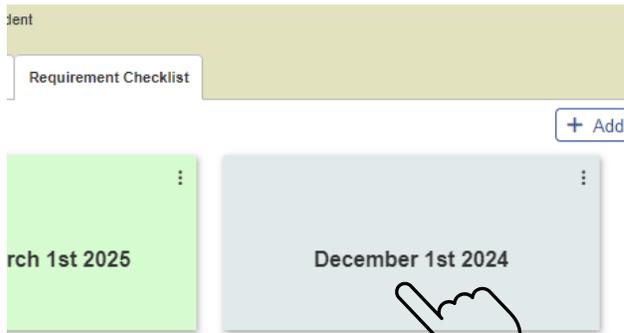
## Tile for each Competence Committee Meeting

The screenshot displays a web application interface for curriculum management. On the left is a dark grey sidebar with a menu containing: Home, Program Curriculum (highlighted with a yellow box), Learner Curriculum, User Groups, Academic Coach, Import, Export, and Lookup Tables. The main content area is titled "Emergency Medicine" and includes the following information: Department: Emergency Medicine, Training Level Type: Resident, and three tabs: Details, Learning Path, and Requirement Checklist (highlighted with a blue box). A button labeled "+ Add New Checklist" is located in the top right of the main area. Below the tabs, five colored tiles represent Competence Committee (CC) meetings: "CC March 1st 2025" (green), "CC September 16, 2024" (pink), "September 3rd 2025" (grey), "CC December 1st 2024" (light blue), and "CC June 1st 2025" (light green). Each tile has a vertical ellipsis menu icon in its top right corner.

A tile is created for each CC meeting (taught in session 2)



## Click on CC meeting tile to display/update documents linked to this meeting



Details Learning Path **Requirement Checklist**

December 1st 2024

Search:  [+ Add New Requirement](#)

Sequence #	Requirement	Responsible for Requirement	File to Upload
1	Resident Self Reflection	Learner	<a href="#">Resident Self Reflection (U of C).docx</a>
2	Academic Advisor/Coach Report	Academic Coach	<a href="#">Academic Advisor_Coach Report (U of C).docx</a>
3	Supplementary Information from Program Administrator	Administrator	<a href="#">Supplementary Information from Program Administrator (U of C).docx</a>
4	Scholarly Project Supervisor Update	Administrator	<a href="#">Scholarly Project Supervisor Update (U of C).docx</a>
5	QI Project Supervisor Update	Administrator	<a href="#">QI Project Supervisor Update (U of C).docx</a>
6	Primary Reviewer Report	Competency Committee	<a href="#">Primary Reviewer Report (U of C).docx</a>
7	Secondary Reviewer Report	Competency Committee	<a href="#">Secondary Reviewer Report (U of C).docx</a>
8	Competence Committee Feedback to Resident	Competency Committee	<a href="#">Competence Committee Feedback to Resident (U of C).docx</a>

# EXPLORE/PRACTICE

Hannah Hilltest Home > Curriculum > Program Curriculum > Edit Program

Home  
Program Curriculum  
Learner Curriculum  
User Groups  
Academic Coach  
Lookup Tables

Name

Stage 1 - Transition to Discipline

BASIC LIFE SUPPORT

HISTORY AND PHYSICAL

Edit Item

HISTORY AND PHYSICAL

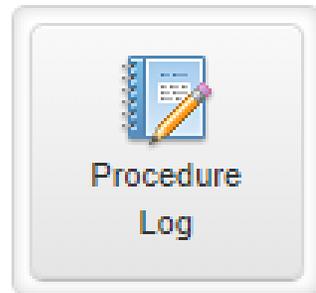
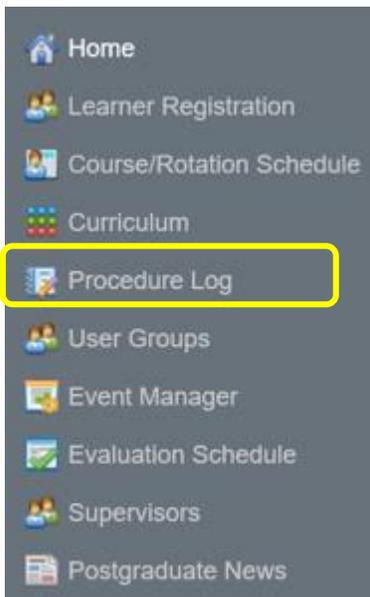
Title: Performing and documenting focused histories and physical exams, and providing  
Requirements: Direct and indirect observation by supervising physician or resident in C  
Collect 20 observations of achievement  
- At least 5 observations of each of the 4 clinical presentations listed  
- At least 2 direct observations of each of the 4 clinical presentations listed

Details Milestones Contextual Variables Requirements

Parent: Stage 1 - Transition to Discipline

Name: HISTORY AND PHYSICAL

Select an EPA:  
Review the context variables  
Review the EPA requirements  
Preview a form



# Procedure Log

This module is best used if you want to look at program level data or export data for multiple residents  
For a single resident, you can just look in their learning path > procedure tab



# Procedure Logs > Lookups

- Home
- Procedure Summary
- Procedure Dashboard
- Lookups**

Home > Procedure Log > Lookup Tables

Category Procedure

Category Total: 6

Search:  [+ Add New](#)

Name	Program	Status
TTD 4 – Personal Teaching and Learning Plan	Diagnostic and Clinical Pathology	Active
Core 10 - Vascular injuries	Vascular Surgery	
Core 10 – CSF Disorder	Neurosurgery	
Core 11 - Chronic venous disease	Vascular Surgery	
Core 11 – Peripheral Nerve Block	Anesthesiology	
Core 13 - TTE advanced	Cardiology - Adult	
Core 14 - Exercise Stress Test	Cardiology - Adult	
Core 14 - Hand Fractures	Plastic Surgery	
Core 14 – Hysteroscopy	Obstetrics and Gynecology	
Core 15 - Nuclear Stress Test	Cardiology - Adult	
Core 15 – Major Vaginal/Vulvar	Obstetrics and Gynecology	
Core 16 - Personal learning and career plans	Diagnostic and Molecular Pathology	
Core 16 - Soft Tissue Hand	Plastic Surgery	
Core 16 – Major Laparoscopic Gynecologic	Obstetrics and Gynecology	
Core 16 – Stereotactic	Neurosurgery	
Core 17 - Major Open Abdominal Gynecologic	Obstetrics and Gynecology	

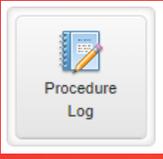
- PGME has pre-programmed the lookups with procedures relevant to every EPA that contains a requirement to submit a logbook
- The **Categories** have been labeled by their corresponding EPA numbers to assist with filtering procedures

Category Procedure

Procedure Total: 238

Search:  [+ Add New](#)

Procedure	Program	External Programs	Category	Form	Effective Date	Expiry Date	Status
2nd stage	Obstetrics and Gynecology		Core 4 - Complex C/S	Obs/Gyn Procedure Log	01-Jan-2024		Active
Anterior cervical decompression	Neurosurgery		Core 28 – Anterior cervical decompression	Neurosurgery Procedure Log	01-Jan-2024		Active
Burr hole for chronic subdural	Neurosurgery		Foundations 9 – Burr hole for chronic subdural	Neurosurgery Procedure Log	01-Jan-2024		Active
CBT	Psychiatry		Core 6 - Psychotherapy	Psychiatry Procedure Log	01-Jan-2024		Active
CRPP hand/carpal	Plastic Surgery		Core 14 - Hand Fractures	Plastic Surgery Procedure Log	01-Jan-2024		Active
Carotid endarterectomy	Neurosurgery		Core 33 - Carotid endarterectomy	Neurosurgery Procedure Log	01-Jan-2024		Active
Chiari	Neurosurgery		Core 10 – CSF Disorder	Neurosurgery Procedure Log	01-Jan-2024		Active



# Procedure Log > Procedure Summary How to view and export procedures by resident

Brittany Redtest | Home > Procedure Log > Procedure Summary > Details

Home | Procedure Summary | Procedure Dashboard | Lookups

Details | Summary

1 Procedure Summary - Details Total: 6

2 Search [x] ... 3

4 Export

<input type="checkbox"/>	Learner	Category	Procedure	Form Name	Supervisor Assessed	Self Assessed	Total # of Logs	Total # of Forms
<input checked="" type="checkbox"/>	Ashley Lintest	UAT Procedure Log	UAT Procedure Log Details	Procedure Log - Common	0	6	20	6
<input type="checkbox"/>	Brandon Thiestest	UAT Procedure Log	UAT Procedure Log Details	Procedure Log - Common	0	2	7	2
<input checked="" type="checkbox"/>	David Philtest	UAT Procedure Log	UAT Procedure Log Details	Procedure Log - Common	0	1	2	1
<input type="checkbox"/>	Journee Bennett	Foundations 3 – Non Airway Basic Procedures	arterial line	Anesthesia Procedure Log	0	1	3	1
<input type="checkbox"/>	Nicole Smithtest	UAT Procedure Log	UAT Procedure Log Details	Procedure Log - Common	0	2	2	2
<input type="checkbox"/>	Noor Philtest	UAT Procedure Log	UAT Procedure Log Details	Procedure Log - Common	0	1	3	1

Showing 1 to 6 of 6 entries | Show 25 entries | First Previous 1 Next Last

Home > Procedure Log > Procedure Summary > Summary

Details | Summary

1 Procedure Summary Dashboard Total: 6

2 Search [x] ... 3

4 Export

<input type="checkbox"/>	Learner	Administrative Program	Total Supervisor Assessed	Total Self Assessed	Total Logged Procedures
<input type="checkbox"/>	Ashley Lintest	Emergency Medicine	0	6	1
<input type="checkbox"/>	Brandon Thiestest	Emergency Medicine	0	2	1
<input type="checkbox"/>	David Philtest	Internal Medicine	0	1	1
<input type="checkbox"/>	Journee Bennett	Anesthesiology	0	1	1
<input type="checkbox"/>	Nicole Smithtest	Internal Medicine	0	2	1
<input type="checkbox"/>	Noor Philtest	Internal Medicine	0	1	1

Showing 1 to 6 of 6 entries | Show 25 entries | First Previous 1 Next Last

- 1 Select Details tab or Summary tab
- 2 Click on the 3 dots to filter your search
- 3 Select the learners you want to export
- 4 Click on Export to create a pdf



# Procedure Log > Procedure Dashboard How to view and export procedures by procedure

The procedure dashboard presents every procedure submitted by learners with all associated details.

The screenshot shows the Procedure Dashboard interface. At the top, the breadcrumb navigation 'Home > Procedure Log > Procedure Dashboard' is highlighted with a yellow box. On the left sidebar, 'Procedure Dashboard' is also highlighted with a yellow box. The main content area has a green header with 'All Procedures' (callout 1) and two 'Export' buttons (callout 3). Below this is a table titled 'Procedure Log' with 15 total entries. The first row is selected with a green checkmark (callout 2). The table columns include Procedure Name, Category Name, Procedure Program, Activity, Start Date, End Date, Evaluation, Trigger, Created By, Supervisor, Evaluatee, Status, Action, and Expiry Date.

Procedure Name	Category Name	Procedure Program	Activity	Start Date	End Date	Evaluation	Trigger	Created By	Supervisor	Evaluatee	Status	Action	Expiry Date
<input checked="" type="checkbox"/> arterial line	Foundations 3 – Non Airway Basic Procedures	Anesthesiology	Adult Anesthesia-Calgary	01-Jul-2024	28-Jul-2024	Anesthesia Procedure Log Q	Start of Rotation 12-Jul-2024	Bennett, Journee		Bennett, Journee	Submitted 12-Jul-2024	View	
<input checked="" type="checkbox"/> UAT Procedure Log Details	UAT Procedure Log	Emergency Medicine	Adult Emergency Medicine-Calgary	01-Jul-2024	28-Jul-2024	Procedure Log - Common Q	Start of Rotation 16-Jul-2024	Thiestest, Brandon	Graytest, John	Thiestest, Brandon	Submitted 16-Jul-2024	View	
<input type="checkbox"/> UAT Procedure Log Details	UAT Procedure Log	Emergency Medicine	Adult Emergency Medicine-Calgary	01-Jul-2024	28-Jul-2024	Procedure Log - Common Q	Start of Rotation 16-Jul-2024	Thiestest, Brandon	Graytest, John	Thiestest, Brandon	Submitted 16-Jul-2024	View	

- 1 Click on All Procedures to filter your search
- 2 Select the procedures log summary you want to export
- 3 Click on Export