

ENTRUSTABLE PROFESSIONAL ACTIVITIES (EPAs): EPA PILOT PRIMER (Assessors)

EPA BASICS

What Is an EPA?

An EPA is a typical clinical task or responsibility that is entrusted for “unsupervised execution by the learner” once they have obtained “sufficient specific competence.” (Ten Cate 2013)

What Are EPA Assessments?

In order to be entrusted with these EPAs, medical students need to be directly observed or supervised prior to graduation to ensure their readiness for indirect supervision on day one of residency. EPA assessments document this readiness as it develops over time.

The MD Program will be incorporating **EPAs** into the 3rd year of clerkship as a form of workplace-based assessment. Implementation will take place in 2 phases with a pilot from March 2023 and full implementation beginning in September 2023. The pilot will enable the MD program to consider student and faculty perspectives as part of a program evaluation. EPA implementation is an **accreditation requirement** and a key component of our **transition to competency-based medical education**.

EPAs will function primarily as a formative, low stakes, feedback tool, enabling us to inform the developmental progress of students over the course of clerkship and support them by providing effective feedback.

EPAs and the MD Program Context

The Association of Faculties of Medicine in Canada (AFMC) has identified **12 EPAs** for undergraduate learners – **tasks that they should be entrusted to perform with indirect supervision on day one of residency training**. Indirect supervision indicates that the supervisor is available for assistance, but not necessarily in the room (*Appendix A*).

An EPA is not high stakes; it is a snapshot. Each assessment provides students with a **data point** of where they are at in their development and creates multiple, ongoing opportunities for coaching and performance improvement. The EPA assessment is **not correlated** to a numeric score. The expectation is that students will move developmentally from one end of the EPA scale to the other over the course of Clerkship, requiring differing levels of supervision throughout.

Intervention	Direction	Support	Competent*
<i>Requires considerable intervention</i>	<i>Requires some intervention</i>	<i>Requires some supervision</i>	<i>Requires minimal to no supervision</i>
<i>"I had to do/re-do the complete task"</i>	<i>"I had to do/re-do parts of the task"</i>	<i>"I had to guide them through the task"</i>	<i>"I provided minimal to no guidance for this task"</i>

During the pilot period, any EPA can be assessed in any course. However, the MD Program has identified EPAs which are recommended **for each course**.

- EPA scale and anchors are comparable in the MD and PGME programs.
- In the MD Program, instead of ‘proficiency,’ the highest level we expect of medical students is competence.*
- EPA Assessors will use **Elentra** (meded.utoronto.ca) – an integrated online platform – to document their assessment.

PROVIDING FEEDBACK EFFECTIVELY

- [Feedback and Coaching Resources](#)
- Video (6 mins) “How to Improve Narrative Feedback” (2020): <https://ofd.med.utoronto.ca/resources/how-improve-narrative-feedback>

THE DEVELOPMENTAL GROWTH MINDSET

- Chadha, Nisha, “Growth Mindset and Medical Education: What is the Connection?” Harvard Macy Institute Community Blog, March 1, 2020: <https://www.harvardmacy.org/index.php/hmi/growth-mindset-and-medical-education>.

REFERENCES

- “AFMC Entrustable Professional Activities for the Transition from Medical School to Residency” (September 2016), EPA Working Group and FMEC PG Transition Group, Association of Faculties of Medicine of Canada (AFMC).
- Ten Cate, Olle, “Nuts and Bolts of Entrustable Professional Activities,” *Journal of Graduate Medical Education* (2013) 5 (1): 157-158, <https://doi.org/10.4300/JGME-D-12-00380.1>

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EPA ASSESSMENTS - KEY OBJECTIVES

- To support and coach learners toward competency attainment
- To formalize and document observation of students in the workplace, including through direct observation and case review
- To provide narrative assessment data and specific, actionable feedback

WHO QUALIFIES AS AN EPA ASSESSOR?

- Faculty, residents, or fellows
- Minimum of 50% of a course’s assessments must be completed by faculty

METHODS OF ASSESSMENT

- **Direct observation of a clinical encounter** [Note: *EPA 1 requires direct observation of an encounter by a faculty member from start to finish*] **OR**
- **Case review**

EPA ASSESSOR’S ROLE DURING PILOT PERIOD

Throughout the course:

1. **Prior to the clinical encounter, learner approaches EPA assessor** to request direct observation of the EPA
2. Assessor and learner **together** identify an appropriate clinical encounter or case
3. EPA assessor conducts direct observation of clinical encounter or a case review
4. EPA assessor **provides verbal feedback specific to the EPA being assessed**
5. EPA Assessor completes **EPA form** in **Elentra**

Mid- and End-of-Course Feedback:

- Faculty responsible for mid- and end-of-course discussions provide the learner with feedback using the current workplace-based assessments in place.
- During the pilot, students can review their EPAs and use them as a tool for self-reflection and self-assessment on their progress to date.
- Faculty should prompt students to share their self-assessment of performance as a way to begin a feedback discussion.
- Faculty review of EPAs is not mandatory during the pilot period. This will be required in Phase 2 of implementation.

NUMBER OF EPA ASSESSMENTS REQUIRED

- During the **pilot**, EPA assessment completion is not mandatory, but is highly encouraged so faculty can gain experience with the tasks required.
- As of September 2023 (2T5 class):
 - EPAs will be **mandatory non-marked learning activities**.
 - Completion of EPA assessments will be required for successful clerkship course completion.
 - Minimum requirements for the completion of EPA assessments will be communicated prior to the start of the academic year.

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APPENDIX A

AFMC EPAs

EPA 1-Obtain a history and perform a physical examination adapted to the patient’s clinical situation

EPA 2-Formulate and justify a prioritized differential diagnosis

EPA 3-Formulate an initial plan of investigation based on the diagnostic hypotheses

EPA 4-Interpret and communicate results of common diagnostic and screening tests

EPA 5-Formulate, communicate, and implement management plans

EPA 6-Present oral and written reports that document a clinical encounter

EPA 7-Provide and receive the handover in transitions of care

EPA 8-Recognize a patient requiring urgent or emergent care, provide initial management and seek help

EPA 9-Communicate in difficult situations

EPA 10-Contribute to a Culture of Safety and Improvement

EPA 11-Perform general procedures of a physician

EPA 12-Educate patients on disease management, health promotion and preventive medicine

RECOMMENDED EPAS FOR 2T4 Class*

	EPA 1	EPA 2	EPA 3	EPA 4	EPA 5	EPA 6	EPA 7	EPA 8	EPA 9	EPA 10	EPA 11	EPA 12
OB/GYN	X		X	X	X			X			X	
Family Medicine	X	X	X	X	X							X
Psychiatry	X	X			X	X			XX			
Pediatrics	X	X	X	X	X							X
Medicine	X	X	X	X		X		X			X	X
Surgery	X	X	X	X	X		X	X			X	
ENT	X											
Ophthalmology	X											
Emergency Med	X	X	X			X		X			X	
Anesthesia							X				X	

*During the pilot period, any EPA may be completed in any course. For September 2023 (2T5 class), core EPAs have been identified for **each clerkship course**.

APPENDIX B: HOW TO ACCESS THE EPA ASSESSMENT FORM

- **Together with the student**, assessors complete the EPA assessment form on Elentra.
- Click here to see a [step-by-step guide](#) to starting an assessment on Elentra as a learner.
- Click here to see a [step-by-step guide](#) to starting an assessment on Elentra as an assessor.

If Learner Begins Assessment:

Step 1: When the learner signs into Elentra, they enter the Assessor's name, date of encounter, assessment method, EPA to be assessed and select "Complete now" (preferred option).

Step 2: Learner completes the Contextual Variable Questions, **then passes the device to the assessor.**

Step 3: **Assessor** completes the "Overall Entrustment" and "Feedback and Comments" section.

Step 4: **Assessor** selects 'SUBMIT', looks for onscreen message ('successfully completed the form') and receives an email confirming submission.

SAMPLE EPA ASSESSMENT (EXCERPT)


*Select an overall rating

<input checked="" type="radio"/>	Competent Requires minimal to no supervision - "I provided minimal to no guidance for this task"
<input type="radio"/>	Support Requires some supervision - "I had to guide them through the task"
<input type="radio"/>	Direction Requires some intervention - "I had to do/re-do parts of the task"
<input type="radio"/>	Intervention Requires considerable intervention - "I had to do/re-do the complete task"

* Strengths (2-3)

*Areas for Improvement (2-3)

*Action Plan for Improvement

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