EPA EXPORT TYPES: HIGH LEVEL EXPLANATION

TARGET AUDIENCE: CBME OFFICE ADMINISTRATORS, PROGRAM ADMINISTRATORS, PROGRAM DIRECTORS

Updated October 31, 2023

EPA Export Types

1. Full EPA Export

a. Royal College Programs

The **Royal College Full EPA Export** that the MedSIS Team can pull upon request through the following Google Form.
Currently includes the following fields:

- Learner CPSO
- Learner Last Name
- Learner First Name
- Learning Path Program
- Learning Path Curriculum
- Stage of Training
- Start of Stage
- End of Stage
- EPA
- EPA Score
- Context Variable 1 -20
- Context Variable 1-20 Value
- Milestone 1-40
- Milestone 1-40 Value

NEW Expanded Export Fields

In addition to the above fields, the Full EPA Export now also includes:

- Observer Name
- Observation Completion Date
- Rotation Name
- Rotation Location
- Rotation Dates
- Comments
- The CanMeds role the milestone is associated with

b. *NEW* Family Medicine Program

The **Family Medicine Full EPA Export** that the MedSIS Team can pull upon request through the following Google Form.
Currently includes the following fields:

- Learner CPSO
- Learner Last Name
- Learner First Name
- Learner Base Location

- Learning Path Program
- Learning Path Curriculum
- Domain of Care
- EPA
- EPA Score
- Observer
- Observation Completion Date
- Rotation Name
- Rotation Location
- Rotation Dates
- Comments (separated appropriately by heading: Done Well and Work On)

2. Royal College Export

The **Royal College EPA Export** is another type of export that the MedSIS Team can pull upon request through the following [Google Form](#).

This is a report developed for the Royal College dashboard project. The fields in the report were the minimum data set required by Royal College. **The data is anonymized.**

The Royal College Export includes the following fields:

Field	Definition	Comments
Institution ID	The institution where the resident is enrolled in training.	McMaster is 44
Specialty ID	The specialty training program of the learner. Each program is assigned an ID number by the Royal College which is included in the technical files	there is a separate list of all the program names and their correspinding ID numbers
Resident ID	A unique alphanumeric identifier of the resident. This is intended to identify records that belong to the same learner.	
Cohort DT	The program start date for the learner	
Stage Start DT	The date the trainee started the stage	There's an issue with this field, for some records it's blank - sitting with K4Y
Stage ID	The stage of training the resident was in at the time the observation was submitted	
EPA Short Name	The EPA short name assigned by the Royal College which is included in the technical files	
EPA Effective Dt	The date this version of the EPA was effective. This will ensure accurate alignment of CBD metrics to different versions of EPA's.	EPA effective dates did not always exist in the technical files. This field was added only when versioning came around so if the field is blank it means no effective date was assigned to that EPA at the time the EPA was imported into MedSIS
Observation Initiation Date	The date that a single EPA observation was initiated	
Observation Completion Date	The date that a single EPA observation was submitted by the observer	
Rating Value	The numeric entrustment score for a single observation of an EPA by an observer	
Rating Scale	The max rating value possible for an observation. The default is 5	
Resident Rotation	The rotation the trainee was on when the form was triggered. Includes Rotation Name; Location; Rotation Dates	
Context	The contextual variables selected on the EPA form (ie Setting: OR | Complexity: High)	
Observer ID	A unique alphanumeric identifier of the observer	
Observer Type	H: Allied Health Professional R: Trainee O: Other C: Physician O: Student O: Patient	Only the top 4 are Royal College Requirements but we have Student and Patient in MedSIS so I've asked K4Y to assign S to Student and P to Patient. If the Observer Type field is blank, it means that observer was not assigned a type in MedSIS. We did not implement Observer Types until we had several thousands of supervisors in MedSIS. We are working on using some calculations to back track and get some of these assigned a type.

Example of RC Excel Export File:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	INSTITUTION_ID	SPECIALTY_ID	RESIDENT_ID	COHORT_DT	STAGE_START_D	STAGE_ID	EPA_SHORT_NAI	EPA_EFFECTIVE_	OBSERVATION_I	OBSERVATION_C	RATING_VALUE	RATING_SCALE	RESIDENT_ROTA	CONTEXT	OBSERVER_ID	OBSERVER_TYPE
2	44	348	9696	2018-07-01	2018-07-01	2	SURGICAL PROCE	2018-02-06	2019-08-04	2019-08-28	3	5	Rotation: Arthro	Role of observer	64932	
3	44	348	10150	2018-07-01	2018-07-01	2	PRE-OP OPTIMIZ	2018-02-06	2020-04-26	2020-05-02	5	5	Rotation: Urolog	Patient risk cate	64912	
4	44	136	10866	2019-07-01	2020-06-01	3	ACUTE PRESENTA	2018-09-06	2020-07-07	2020-07-12	3	5	Rotation: Nephr	Focus of care:ma	58213	
5	44	315	10835	2020-07-01		2	FUNDAMENTAL S	2020-07-01	2020-08-06	2020-08-06	3	5	Rotation: ACS JR	Observer Role:ge	55001	
6	44	315	8579	2020-07-01	2020-07-01	3	COLONOSCIPIES	2020-07-01	2020-09-13	2020-09-13	5	5	Rotation: Genera	Findings:normal	54773	
7	44	348	10903	2019-07-01	2021-03-02	2	CRITICALLY ILL SU	2018-02-06	2020-09-14	2020-09-14	5	5	Rotation: Pediati	Case complexity	66709	R
8	44	136	12969	2021-07-01		1	INITIAL ASSESSM	2018-09-06	2021-07-17	2021-07-17	4	5	Rotation: CTU M	Type of patient v	88197	C
9	44	145-A	12828	2021-07-01		1	HANDOVER	2020-07-01	2021-10-06	2021-10-06	5	5	Rotation: CTU Medicine Jr	Med Re	62676	

3. Evaluation Schedule Export

The **Evaluation Schedule Export** is essentially a high-level summary and does not include individual evaluation data such as qualitative comments or rating scale scores.

This export type does not need approval from the CMBE office and can be pulled by Program Administrators. The export fields include all filters available within the Evaluation Schedule

- Program Administrators are already actively using them to filter to different trainees/supervisors/evaluation type etc. to view evaluation statuses.

For CBME specifically, I've included an example below showing all available filter headings (in bold that can be expanded/collapsed) as well as selected filters for both:

- Evaluation Type: CBME Evaluation
- Training Program: Psychiatry

However, Program Administrators can add even more filters to include specific trainees or specific supervisors if warranted.

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Export Formats

All three types will dump the data into a large excel sheet – *pivot tables are an excellent organizational tool for excel savvy folks.*