

## ENTRUSTABLE PROFESSIONAL ACTIVITIES (EPAs): A PRIMER FOR 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 has incorporated **EPAs** into the 3<sup>rd</sup> year of clerkship as a form of workplace-based assessment as of September 2023. EPA implementation is an **accreditation requirement**.

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 support consistent workplace based assessment across clerkship courses.

#### 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>

Any EPA can be assessed in any course. However, the MD Program requires that at least one EPA #1 (observed history and physical) be completed in each course. (EXCEPTION: Anaesthesia- requires at least one EPA 7 and at least one EPA 11.)

- 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](http://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 OR**
- **Case, consultation or chart review**

## EPA ASSESSOR’S ROLE

### 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 will continue to discuss feedback with students based on all available assessments, which may include EPAs.
- Students can review their EPAs and use them as a tool for self- reflection and self-assessment on their progress to date.
- EPAs will be discussed with students during their Progress Reviews with their Portfolio Scholars

## NUMBER OF EPA ASSESSMENTS REQUIRED

- EPAs are **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 during orientation to each course.
- On average, the number of EPAs required in a course is equal to the duration of the course in weeks.

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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

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

\* Strengths (please provide 2-3 examples)

\*Action Plan for Improvement (based on areas for improvement)

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