



PGME Minimum Standards: EPA Assessment Tools

Approved: PGMEAC, January 26, 2018

1. EPAs must be integrated as one assessment method within the residency programs' Program of Assessment Plan.
2. Each EPA Assessment Tool must:
 - a. be based on the EPAs and milestones defined by the Royal College for the specialty,
 - b. clearly identify the level of performance expected for entrustment of the EPA (e.g. through labelling).
3. EPA Assessment Tool should:
 - a. minimize the length of the tool as much as possible, thereby reducing demands imposed on raters/faculty (e.g. 8 milestone items)
 - b. reflect an explicit and integrated mapping of milestones for an EPA
 - c. maintain consistency of milestones and Overall ratings across the stages of training for each program (i.e. Transition to Residency, Foundations of Discipline, Core of Discipline, Transition to Practice).
4. All milestone and EPA ratings will be on a 5-point scale with appropriate anchors.
 - a. Programs will choose one of the four assessment tool descriptors provided for their Milestones ratings (see Appendix 1)
 - b. Programs will use a common Overall Entrustment rating (see Appendix 1)
 - c. Programs will use the Entrustment headings from the options provided
 - d. The use of numbers is generally not included on the form.
 - i. Where there is a descriptive 5-point scale, the left most anchor will be the lowest and the right most anchor will be the highest.
 - ii. Where questions use a 5-point numerical scale, 1 will be the lowest and 5 will be the highest
5. All forms will have one item that serves as the Overall global entrustment item.
 - a. All overall items will be on a 5-point scale with appropriate anchors
 - b. The overall item will provide clarity on what is expected for entrustment through the use of the Entrustment Headings
 - c. The Overall scale will use the same descriptors as that used for the individual ratings
 - d. This item will stand alone from other performance ratings and be considered the definitive score for global assessment analysis.
6. Each tool will present the milestone ratings first, and then follow with the Overall entrustment rating.
7. All EPAs will provide space for information on the reason for not entrusting the activity and suggestions for improvement.

APPENDIX 1: EPA Assessment Tool OVERALL Entrustment Rating¹

A. Option selected by program: 4 EPA Assessment Tool Milestones

1. Supervision Approach (adapted from OSCORE)

Intervention	Direction	Support	Autonomy	Excellence
Requires others' action for completion.	Requires supervision and others' guidance for completion.	Requires minimal supervision or guidance for completion.	Does not require guidance or supervision for completion.	Demonstrates excellence; is a good role model

2. Complexity Approach (adapted from Leep²)

Intervention	Direction	Support	Autonomy	Excellence
Assesses and manages with very simple cases	Assesses and manages low complexity level .	Assesses and manages moderate complexity cases .	Assesses and manages complex case .	Assesses and manages very complicated and rare case .

3. Expertise Approach

Intervention	Direction	Support	Autonomy	Excellence
Performance well below training level . Does not know limits and/or ask for help.	Meets many requirements but below training level .	Meets MOST requirements but below training level	Meets ALL requirements. Acceptable performance at training level .	Exceeds requirements. Excellence for training level .

4. Professional Identity Approach

Intervention	Direction	Support	Autonomy	Excellence
Performs some tasks. Still requires considerable intervention direct	Performs most tasks, and demonstrates some autonomy. Requires some direct involvement	Performs most tasks autonomously. Requires minimal guidance	Performs all tasks autonomously and competently. Appropriately asks for guidance.	Performs above expected level of training.

B. Common across all programs

EPA Assessment Tool OVERALL Entrustment rating

Intervention	Direction	Support	Entrustment	
			Autonomy	Excellence
<i>Somebody else had to complete all or almost all</i>	<i>Required major instruction</i>	<i>Required some minor advice</i>	<i>Supervisor didn't need to be there</i>	<i>Demonstrated leading practice, acted as a role model</i>

¹ NOTES to assessors

The purpose of an EPA is to determine if the resident is **entrusted in the activity at this time**.

Practically, the assessor is making a yes/no decision.

Either the assessor entrusts the assessee to perform the task or not.

In an effort to provide feedback to the assessee a 5-point scale has been created with 2 descriptions of entrustment and 3 descriptions of not entrustment. If there is not enough information at the time of assessment to entrust on the milestones assessed, then 'not entrustment' needs to be selected by the assessor.

- ² Leep Hunderfund, A.N., et al., Ways to Write a Milestone: Approaches to Operationalizing the Development of Competence in Graduate Medical Education. Academic Medicine, 2017. 92(9): p. 1328-1334.