

Appendix 2:

Template for In-Training Assessment Reports (ITAR)

Background

As part of the implementation of Competency Based Medical Education (CBME) models for Family Medicine (i.e. Triple C) or Royal College (i.e. Competence by Design (CBD)), a new guideline on the purpose, content and format of In- Training Assessment Reports (i.e. 'ITARs') and In-Training Evaluation Reports (i.e. ITERs) was approved by the Postgraduate Medical Education Advisory Committee (PGMEAC) in January 2018. The approved guidelines⁷ can both be found on the PostMD Website.

The purpose of this current document is to provide guidance to residency programs in creating an ITAR that meets the requirements of the Minimum Standards.

An ITAR is an assessment tool that is used to summarize the performance of the trainee for a given rotation. It reports on the completion of required assessments for this rotation (e.g. EPAs, procedure logs), the performance on the key objectives for the rotation (as outlined in the Rotation Plan), and overall performance on the CanMEDS roles. One purpose of the ITAR is as a Learner Handover tool⁸, and as such, it identifies any areas needing extra work in future rotations.

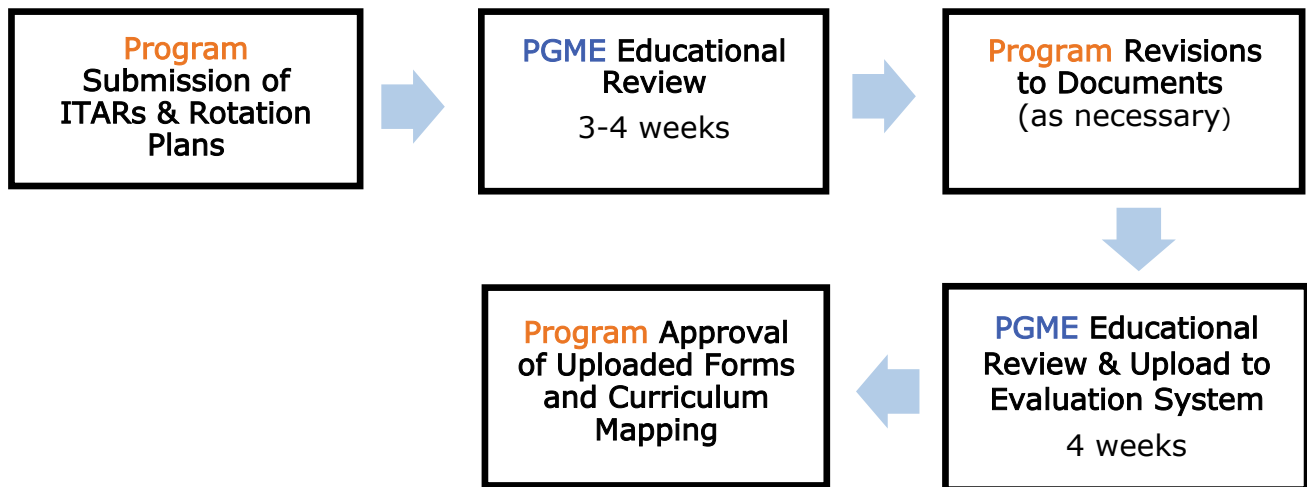
Common questions are found in Appendix 2, and a sample of a built ITAR is presented in Appendix 3 at the end of this document.

Once drafted, each ITAR will be reviewed and approved by PGME staff.

⁷ Link: [PGME Minimum Standards: Resident In-Training Assessment Reports \(ITARs\) and In-Training Evaluation Reports \(ITERs\)](#)

⁸ Link: [Learner Handover and Appropriate Disclosure of Learner Needs](#)

Who does what for ITAR development and review process



Step 1: **Program** Submission of ITARs & Rotation Plans to PGME

Step 2: **PGME** Education Review

- Once submitted, the Educational Review takes approximately 3-4 weeks.
- It is highly recommended to meet with the educational consultant. This is often a 1-2 hour in-person meeting at PGME, however if travel is an issue then a webinar meeting can be considered.
- ITARs (and other assessment tools) should be approved by your Residency Program Committee. It is recommended that ITARs not be approved by the RPC until after they have had their educational review by PGME.

Step 3: **Program** Revisions to Documents

- After the educational review, documents are sent back to the program with comments/questions.
- When the program has completed this review, the documents are sent back to PGME for a final Educational Review.

Step 4: **PGME** Educational Review & Uploading

- PGME provides a final review prior to sending the documents to the Evaluation Systems (POWER) Team.
- Once forwarded to the Evaluation Systems Team, the process to load the documents to POWER can take up to 4 weeks.

Step 5: **Program** Approval of Uploaded Forms and Curriculum Mapping

- You will be asked to review and sign off on the version 'built' in the online system. You will be asked what rotation/PGY level the new forms should be linked to.

Program process to develop a new ITAR

Before you start:

- Develop your Curriculum and Assessment Map
- Develop the Rotation Plan⁹ for the particular rotation. The Key Objectives from a Rotation Plan are included in the ITAR.
- Once the Rotation Plan is completed, move on to filling in the ITAR, following the instructions below.

Reminders:

- After the ITAR is drafted, please send to the CBME & CBD email: cbme.pgme@utoronto.ca.
- The documents will be reviewed and returned to you with requested changes or revisions.
- After reviewing the comments return back to the cbme.pgme@utoronto.ca email for the person who sent you the feedback.

Original approved: PGMEAC, April 27, 2012

Updated approved: PGMEAC, January 20, 2018

Updated template, sample, FAQs, & Hints on Completion: Dec 8, 2019

Section 1: (Required

⁹ Link [Rotation Plan Template](#)

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Instructions: *Insert the required information in the title, i.e. Department Name, Program Name, Rotation Name, PGY year(s) and CBD Stage(s) for this rotation. You may also wish to include a link to the rotation plan.*

In-training Assessment Report (ITAR) for Department of [Department Name]
[Program Name] [Rotation Name] PGY [Year(s)] CBD [Stage(s)]

Please review the HINTS file for tips on completing the ITAR. The file can be found by clicking the link: [Hints for completing the ITAR](#) (see page 16 for what will be displayed)

Please review the Rotation Plan before completing the form. The Rotation Plan can be found by clicking link: [Link to rotation plan](#)

Section 2: (Standard for All Programs)

The appropriate assessments were completed during this rotation, as outlined in the Rotation Plan (e.g. EPA, procedure logs, chart documentation assessment, MSF, rounds)

- Yes
- No
- In Progress
- Not Applicable

Section 3: (Required)

Instructions: *Please select one of the rating scales and one of the sets of descriptors, found in Appendix 1 (also found in the PGME Minimum Standards: Resident In-Training Assessment Reports (ITARs) and In-Training Evaluation Reports (ITERs)).*

Rating Scale Definitions:

Please Note: 3 or higher is a pass.

1	2	3	4	5	N/A
Label		Label		Label	
Descriptor		Descriptor		Descriptor	

Section 4:

(Required)

NOTE: A *maximum* of 10 items may be included in the ITAR. These are copied over, verbatim, from the Rotation Plan Key Objectives.

N/A = Not Applicable

IN THIS PROGRAM NAME-ROTATION NAME ROTATION OBJECTIVES	1	2	3	4	5	N/A
1.	☐	☐	☐	☐	☐	☐
2.	☐	☐	☐	☐	☐	☐
3.	☐	☐	☐	☐	☐	☐
4.	☐	☐	☐	☐	☐	☐
5.	☐	☐	☐	☐	☐	☐
6.	☐	☐	☐	☐	☐	☐
7.	☐	☐	☐	☐	☐	☐
8.	☐	☐	☐	☐	☐	☐
9.	☐	☐	☐	☐	☐	☐
10.	☐	☐	☐	☐	☐	☐

Section 5:

(Required)

NOTE: This section is intended as a holistic view of each CanMEDS role. The key objectives are captured above and should not be included in this section. Items here can be taken from, or adapted from, the Sample.

PROGRESS IN TRAINING – Learner handover	Acceptable?	
MEDICAL EXPERT COMPETENCIES including:	Yes	No
COMMUNICATOR COMPETENCIES including:	Yes	No
COLLABORATOR COMPETENCIES including:	Yes	No
LEADER COMPETENCIES including:	Yes	No
HEALTH ADVOCATE COMPETENCIES including:	Yes	No
SCHOLAR COMPETENCIES including:	Yes	No
PROFESSIONAL COMPETENCIES including:	Yes	No

Section 6: (Standard for All Programs)

Is this resident on an appropriate trajectory for this point in training?	Yes	No
Needs: Are there any areas that need focused work in the next rotation? <i>If yes, describe below in "Actions or Areas for Improvement"</i>	Yes	No

Section 7: (Standard with Exception of Labels)

Overall Performance related to this
Rotation

Please Note: 3 or higher is a pass

	Label		Label		Label
OVERALL performance related to this educational experience	1	2	3	4	5

Feedback & Comments
Describe Strengths
Actions or Areas for Improvement
Other Comments

Section 8: (Standard Questions AFTER ITAR Submitted)

After the faculty member submits the ITAR, when the resident opens the ITAR, there are 2 standard questions that Residents must complete:

1. I received detailed verbal feedback on my performance at or near the end of the rotation.
 - o Yes
 - o No
2. In general this evaluation accurately reflects my performance.
 - o Yes
 - o No

SELECTION: ITAR Labels and Descriptors

ITAR *Label Options*

Select one set of labels, *to be inserted* in the ITAR.

The same set of labels will be used for *all* the ITARs for the Program.

Only these 3 labels are available for 2020-2021

Label Option 1

1	2	3	4	5
Fails to Meet Essential Competencies		Meets Essential Competencies		Demonstrates Enhanced Competencies

Label Option 2

1	2	3	4	5
Below Expectations For Training Level		Meets Expectations For Training Level		Exceeds Expectations For Training Level

Label Option 3

1	2	3	4	5
Unsatisfactory		Solid performance		Superior

ITAR/ITER Descriptors Options

ITAR Descriptors Options

- Select one set of descriptors, *to be inserted* in the ITAR/ITER.
- The same set of descriptors will be used for *all* the ITARs/ITERs for the Program.

Please select one of these for 2019-2020. Minor changes permissible IF approved by PGME Changes to be identified using track changes in Word.*

Descriptors Option 1

1	2	3	4	5	N/A
Quality of performance in many aspects is lower than expected for trainees in this postgraduate level. Deficiencies are extreme and will not be remediable within the regular program.		Quality of performance is consistent with expectations for trainees in this postgraduate level. Performance is consistent with educational objectives.		Quality of performance is outstanding and consistently exceeds expected for trainees in this postgraduate level. Performance consistently exceeds levels of proficiency defined by the education objectives.	

Descriptors Option 2

1	2	3	4	5	N/A
Below the minimally acceptable level for a trainee at this postgraduate level in the specified practice context (i.e., patient population, learning environment, practice setting). Does not know limits or ask for assistance when needed. Not responding to feedback.		Demonstrates a solid understanding of the issues, interpretation of problems and basic implementation of solution(s). Does what is expected. Handles common or straightforward situations and presentations competently.		Demonstrates ease and efficiency in handling common, straightforward as well as increasingly complex situations and presentations. Demonstrates excellence in his or her understanding of the issues, ability to interpret problems and implement solutions. Exceeds the benchmark for competent performance at the training level.	

Descriptors Option 3

1	2	3	4	5	N/A
Does not know limits or ask for assistance when needed. Not responding to feedback. Lacks flexibility.		Improved with minor intervention/attention. Solid, teachable resident, improves with instruction. Knowledge or skills in certain areas need modest development. Adaptable.		Proactively initiates development and improvements. Dynamic learner, synthesizing beyond training level and improves the performance of other team members. Responsive and reflective in enabling effective outcomes patients, team and self Anticipates what is	

				needed.	
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Descriptors Option 4

1	2	3	4	5	N/A
Overall unacceptable performance for level of training. Did not meet the accepted benchmark for competent performance at level of training in the required competencies. Significant and/or multiple performance deficits. Unacceptable knowledge or skills in understanding of the issues, to interpret or manage common problems.		Meets accepted benchmark for competent performance for level of training. Meets the essential requirements for a trainee at training level. Performance meets expectations in handling common or straightforward situations and presentations in day-to-day practice.		Knowledge or skills superb in most/many areas. Performs very well with minimal guidance or instruction. Performs well beyond level of typical resident. Skillful performance Few or no areas of weakness demonstrated.	

Descriptors Option 5

1	2	3	4	5	N/A
Underachiever. Really needs improvement. Unsafe and/or dangerous actions. Not trustworthy.		Solid, dependable. Strong resident.		Exemplary. High performer. Outstanding resident.	