

## CBD observation templates

There are four Competence by Design (CBD) observation templates designed to operationalize the educational principles of CBD (e.g. narrative, actionable, timely feedback). They include validated components (e.g. entrustment anchors) that help to establish a common language of assessment, while also prompting conversations about the essential ingredients of competence and the factors contributing to entrustment decisions.

Your program/discipline may have other good assessment tools, possibly even validated tools, which you are encouraged to continue to use even after you transition to CBD. Locally driven innovations at the individual faculty level should complement and expand on the principles of CBD, including the four national templates below. Depending on your site's electronic platform your observation forms may look slightly different but the principles and content are similar.

The important thing to remember is it's not necessarily what tool(s) you use, but the fact that you're conducting and documenting regular observations to inform the work of the [competence committee](#).

While these templates will help programs transition to CBD, there is no magic in the forms themselves. They're designed to support workplace based assessment, but the real improvement in assessment will come from regular observation and the coaching of residents. For this reason, individual faculties can use their own version of these assessment templates. The Royal College's main expectation is that your program complies with the essential elements of the [assessment strategy](#).

Each template serves a slightly different purpose, but all four encourage narrative feedback. This is important because narrative feedback is shown to help trainees improve their performance. It also enriches the information the competence committee uses to reach decisions.

### Form 1: EPA observation

This form is designed for documenting a resident's performance on any EPA (or a specific part of an EPA). It uses an entrustment scale to rate the level of performance with respect to the resident's ability to do the task independently.

### Form 2: procedural competencies

This form is used for documenting a resident's ability to perform a procedure. It uses an entrustment scale to rate the resident's level of performance with respect to the resident's ability to do the task independently.

### Form 3: multi-source feedback

This form may be completed by physicians, off-service physicians, or allied care team members as directed by the program/discipline.

### Form 4: narrative observation

This form can be used to document any observation of a trainee's performance. It does not use a rating scale. Rather the assessor is asked to describe the performance and make recommendations for improvement. It can essentially be used in any setting to provide any useful information to the trainee or [competence committee](#) and it can be linked to an EPA post-hoc if relevant.

## EPA OBSERVATION - TEMPLATE 1 (EXAMPLE)

Observation

Evidence & Reflection

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Learner:

EPA Title:

Key Features:

EPA Stage:  Date of Observation:

Type of Assessment:   Location of patient visit:   Case mix:

Context #4:   Context #5:   Complexity:

Additional Context Information:

Based on this observation overall:  I had to do  I had to talk them through  I needed to prompt  I needed to be there just in case  I didn't need to be there

Milestones associated with this EPA:

	Not observed	InProgress	Achieved
ME 1.3.1 Apply clinical and biomedical sciences to manage core patient presentations in Interanal Medicine (Modified)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
ME 1.4 Perform complete and appropriate assessments of patients with common acute medical presentation	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
ME 2.2.1 Generate differential diagnosis along with appropriate diagnostic strategies	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
ME 3.4.2 See assistance as needed when unanticipated findings or changing clinical circumstances are encountered	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
COM 2.1.1 Conduct a patient-centred interview, gathering all relevant biomedical and psychosocial information for any clinical presentation	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Feedback to Resident and Competence Committee:

Interview skills have significantly improved and the flow of the interaction is now much smoother. Going forward, work on application of potential differential diagnoses and potential diagnostic tests to achieve a definitive cause of the chest pain.

Professionalism and Patient Safety:

Do you have any concerns regarding this Learner's professionalism?  No  Yes

Do you have any concerns regarding Patient Safety?  No  Yes

If yes, description of concern:

Close

Save

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Submit

In CBD, forms like this one will be used for documenting a resident's performance on an EPA. It uses an entrustment scale to rate the resident's ability to do the task independently.

## EPA OBSERVATION - TEMPLATE 1 (BLANK)

Observation

Evidence & Reflection

✕

Learner:

EPA Title:

Key Features:

EPA Stage:  Date of Observation:

Type of Assessment:

Location of patient visit:

Case mix:

Context #4:

Context #5:

Complexity:

Additional Context Information:

Based on this observation overall:  I had to do  I had to talk them through  I needed to prompt  I needed to be there just in case  I didn't need to be there

Milestones associated with this EPA:

	Not observed	In Progress	Achieved
Milestone 1	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Milestone 2	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Milestone 3	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Milestone 4	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Milestone 5	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Feedback to Resident and Competence Committee:

Professionalism and Patient Safety:

Do you have any concerns regarding this Learner's professionalism?  No  Yes

Do you have any concerns regarding Patient Safety?  No  Yes

If yes, description of concern:  No  Yes

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Note: This document is a representation of a CBD observation form available in the Royal College's ePortfolio system.

## PROCEDURAL COMPETENCIES - TEMPLATE 2 (EXAMPLE)

Observation

Evidence & Reflection

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Learner:

EPA/IM Title:

Key Features:

EPA Stage:  Date of Observation:

Complexity:

Based on this observation overall:  I had to do  I had to talk them through  I needed to prompt  I needed to be there just in case  I didn't need to be there

Milestones associated with this EPA:

	I had to do	I had to talk them through	I needed to prompt	I needed to be there just in case	I didn't need to be there
1.1 Informed consent obtained and placed on chart	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
1.2 Appropriate lumbar puncture kit obtained, and set up properly using sterile technique	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
1.3 Time out performed prior to procedure	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
1.4 Patient placed in appropriate position and landmarks identified	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
1.5 Site cleaned using proper technique	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
(Additional milestones)					

Feedback to Resident and Competence Committee:

Second lumbar puncture completed by resident. Required prompting through the procedure. Some difficulty locating L3 - L4 - L5 interspaces following the palpation of the posterial iliac crests. For the next LP, I want you to work on techniques to access the CSF.

Professionalism and Patient Safety:

Do you have any concerns regarding this Learner's professionalism?  No  Yes

Do you have any concerns regarding Patient Safety?  No  Yes

If yes, description of concern:

Close

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Note: This document is a representation of a CBD observation form available in the Royal College's ePortfolio system.

In CBD, forms like this one will be used for a resident's ability to perform a procedure. It uses an entrustment scale to rate the resident's ability to do the task independently.

## PROCEDURAL COMPETENCIES - TEMPLATE 2 (BLANK)

Observation

Evidence & Reflection

✕

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Learner:

EPA/IM Title:

Key Features:

EPA Stage:  Date of Observation:

Complexity:

Based on this observation overall:  I had to do  I had to talk them through  I needed to prompt  I needed to be there just in case  I didn't need to be there

Milestones associated with this EPA:

	I had to do	I had to talk them through	I needed to prompt	I needed to be there just in case	I didn't need to be there
Milestone 1	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Milestone 2	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Milestone 3	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Milestone 4	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Milestone 5	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
(Additional milestones)					

Feedback to Resident and Competence Committee:

Professionalism and Patient Safety:

Do you have any concerns regarding this Learner's professionalism?  No  Yes

Do you have any concerns regarding Patient Safety?  No  Yes

If yes, description of concern:

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Note: This document is a representation of a CBD observation form available in the Royal College's ePortfolio system.

## MULTIPLE SOURCE FEEDBACK (MSF) - TEMPLATE 3 (EXAMPLE)

Observation

Evidence & Reflection

✕

Learner: HGranger Learner 934  Date of Observation: 11/10/2016

**Framing**                      This template is intended to capture your Observation Rating of a learner, based on your multiple encounters with that learner over time. Observation Ratings are provided anonymously and collated prior to presentation to the learner. Please complete this observation within 2 weeks of receiving this request. If you require further assistance, please contact the Program Administrator.

The following Milestones were demonstrated:

	Not observed	Never	Sometimes	Usually	Always
Recognize when to seek help in providing clear explanations to the patient and family	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Synthesize patient information including symptoms, differential diagnosis, and treatment plan clearly and concisely	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Identify patients requiring handover to other physicians or health care professionals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Elicit a basic history	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

**Feedback to Resident and Competence Committee:**

Resident is able to provide information to patients and their families in a clear and accurate manner. Further development may be required in order to 'check-in', verify, and validate as to whether there is complete understanding with regard to diagnosis, prognosis, and management plan.

**Professionalism and Patient Safety:**

Do you have any concerns regarding this Learner's professionalism?    No    Yes

Do you have any concerns regarding Patient Safety?    No    Yes

If yes, description of concern:

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Note: This document is a representation of a CBD observation form available in the Royal College's ePortfolio system.

In CBD, forms like this one will be used for collecting resident performance data from the resident's colleagues.

## MULTIPLE SOURCE FEEDBACK (MSF) - TEMPLATE 3 (BLANK)

Observation Evidence & Reflection ✕

Learner:   Date of Observation:  

**Framing**

This template is intended to capture your Observation Rating of a learner, based on your multiple encounters with that learner over time. Observation Ratings are provided anonymously and collated prior to presentation to the learner. Please complete this observation within 2 weeks of receiving this request. If you require further assistance, please contact the Program Administrator.

The following Milestones were demonstrated:

	Not Observed	Never	Sometimes	Usually	Always
Milestone 1	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Milestone 2	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Milestone 3	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Milestone 4	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Milestone 5	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Feedback to Resident and Competence Committee:

**Professionalism and Patient Safety:**

Do you have any concerns regarding this Learner's professionalism?  No  Yes

Do you have any concerns regarding Patient Safety?  No  Yes

If yes, description of concern:

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Note: This document is a representation of a CBD observation form available in the Royal College's ePortfolio system.

This is a worked example based on mock resident data. In CBD, forms like this are used to document any observation of a trainee's performance. Observers describe the performance and make recommendations for improvement.

## NARRATIVE OBSERVATION - TEMPLATE 4 (EXAMPLE A)

✕

Narrative

Evidence

LearnerStage: Foundations of Discipline

Learner: HGranger Learner 934      Date of Observation: 11/10/2016

Feedback to Resident and Competence Committee:

Tendency to use too much medical jargon when explaining issues to patients. Ex. In the patient with an abnormal lesion on the chest x-ray you said, "It could be an infiltrate, a granuloma, a malignancy..." In the future you should consider the patient's background, unless they work in healthcare they are probably unfamiliar with those types of words. You need to find ways to explain things without using medical jargon, for example, a malignancy would be better understood as cancer for many people.

Professionalism and Patient Safety:

Do you have any concerns regarding this Learner's professionalism?     No     Yes

Do you have any concerns regarding Patient Safety?                     No     Yes

If yes, description of concern:

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In CBD, forms like this one will be used to document any observation of a trainee's performance. Observers describe the performance and make recommendations for improvement.

## NARRATIVE OBSERVATION - TEMPLATE 4 (BLANK A)

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Narrative Evidence

LearnerStage:

Learner:  Date of Observation:  

Feedback to Resident and Competence Committee:

Professionalism and Patient Safety:

Do you have any concerns regarding this Learner's professionalism?  No  Yes

Do you have any concerns regarding Patient Safety?  No  Yes

If yes, description of concern:

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This is a worked example based on mock resident data. Observers describe the performance and make recommendations for improvement.


## NARRATIVE OBSERVATION - TEMPLATE 4 (EXAMPLE B)

✕

**Narrative**Evidence

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LearnerStage: Foundation of Discipline

Learner: HGranger Learner 934      Date of Observation: 11/10/2016 

Feedback to Resident and Competence Committee:

Today I observed the resident have a conflict with a patient and the patient's family. The discussion became heated and the resident became emotional and lost control of the interview. I told the resident that his behaviour was inappropriate and we discussed techniques for diffusing situations like this in the future. He acknowledged this as an issue of professionalism and has agreed to reflect on the situation to ensure that this does not happen again.

Professionalism and Patient Safety:

Do you have any concerns regarding this Learner's professionalism?     No     Yes

Do you have any concerns regarding Patient Safety?                       No     Yes

If yes, description of concern:

SEE ABOVE

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In CBD, forms like this one will be used to document any observation of a trainee's performance. Observers describe the performance and make recommendations for improvement.

## NARRATIVE OBSERVATION - TEMPLATE 4 (EXAMPLE B)

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Narrative

Evidence

LearnerStage:

Learner:  Date of Observation:

Feedback to Resident and Competence Committee:

Professionalism and Patient Safety:

Do you have any concerns regarding this Learner's professionalism?  No  Yes

Do you have any concerns regarding Patient Safety?  No  Yes

If yes, description of concern:

Close

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