

Workplace Based Assessment

Clerkship Leadership Handbook

March 2021

Grading for Workplace Based Assessment

A grade of “pass” is awarded for 35% of the grade when a student has completed:

- Minimum two WBA forms submitted for an average of two per week for each week of patient interaction in the clerkship block
- Minimum 4 different Entrustable Professional Activities (EPAs) seen by end of each clerkship block. Each clerkship director sets the specific EPAs and this must be documented and communicated to faculty and students.
- Minimum of 2 faculty members and 2 residents must complete WBA assessments for the learner. If no resident is present in a clinical block or rotation (e.g. rural rotations, some community clinic rotations), then only the attending assesses the learner a minimum of two times a week.

What constitutes “fail” in WBA:

- Not meeting the minimum in one or more WBA requirement(s), as listed above
- Being evaluated by an individual who is not an attending or resident (e.g. peer, friend, family member, etc). This constitutes academic dishonesty and is subject to the consequences outlined in the Honor Code policy, including academic dismissal.

Note: Grading for WBA is “all or none”. That is, students are awarded 35% for completing the minimum WBA requirements as outlined above and in the policy. If students do not meet the minimum by the end of the last day of the rotation, they are awarded 0% for this portion of the final clerkship grade. There is no remediation period.

Getting Ready for WBA in Clerkships

Faculty Development for WBA

Training videos on giving feedback and on WBA for faculty and residents can be found on the Faculty and Instructional Development website:

- <https://fid.medicine.arizona.edu/content/workplace-based-assessment-clerkship-training>

The links to the four videos are also provided below.

An Overview: What is Workplace Based Assessment?



To access this video, please click on this link or paste it into your browser:

shorturl.at/oNZ23

Understanding the WBA Entrustment Scale



To access this video, please click on this link or paste it into your browser:

shorturl.at/cdqLY

How WBA Reduces Unconscious Bias in Clerkship Grading



To access this video, please click on this link or paste it into your browser:

shorturl.at/atEG6

Tips for Giving Feedback on the WBA Form:



To access this video, please click on this link or paste it into your browser:

shorturl.at/jSXY5

Orientation to the WBA Dashboard for Clerkship Directors and Clerkship Coordinators



To access this video, please click on this link or paste it into your browser:

shorturl.at/gOUVZ

Templates for Grand Rounds or similar meetings are available through the Office of Curricular Affairs. The Associate Dean is happy to join you at your presentation, co-lead, or lead the presentation. Please contact the Associate Dean of Curricular Affairs (corralj@email.arizona.edu).

If you have additional questions or suggestions for Faculty Development specific to WBA, please contact WBAAdmin@email.arizona.edu

Getting Familiar with the EPAs

What are EPAs?

Entrustable Professional Activities (EPA) were published by the AAMC in 2014 as the activities all medical students should be able to perform upon entering residency, regardless of their future career specialty. EPAs provide practical approach to assessing competence in real-world settings and impact both learners and patients.

For more information, visit <https://www.aamc.org/what-we-do/mission-areas/medical-education/cbme/core-epas>

Which EPAs will students be assessed on?

Throughout the Clerkship Phase, students will be assessed on 8 different EPAs which are listed below.

- EPA 1: Gather a History and Perform a Physical Examination
- EPA 2: Prioritize a Differential Diagnosis Following a Clinical Encounter
- EPA 3: Recommend and Interpret Common Diagnostic and Screening Tests
- EPA 5: Document a Clinical Encounter in the Patient Record
- EPA 6: Provide an Oral Presentation of a Clinical Encounter
- EPA 7: Form Clinical Questions and Retrieve Evidence to Advance Patient Care
- EPA 8: Give or Receive a Patient Handover to Transition Care Responsibility
- EPA 9: Collaborate as a Member of an Interprofessional Team

Each clerkship has agreed to assess students on a minimum of 4 different EPAs. It is important that students are aware of the EPAs that correspond to each clerkship so that they can meet the assessment requirements. The table below outlines the EPAs that will be assessed in each clerkship.

Table 1. EPAs by Clerkship

	Surgery	Psychiatry	Neurology	Medicine	FCM	Pediatrics	OB/GYN
EPA 1	X	X	X	X	X	X	X
EPA 2		X	X	X	X	X	X
EPA 3			X	X	X	X	X
EPA 5	X	X	X	X	X	X	X
EPA 6	X	X	X	X	X	X	X
EPA 7		X		X	X		
EPA 8	X						
EPA 9		X					

WBA EPA Requirements

Students are required to be assessed on a minimum of 4 different EPAs during each clerkship. Students should only be assessed on the EPAs selected for that clerkship which is shown in Table 1. Failure to meet these WBA EPA requirements for a clerkship will result in receiving a grade of 0 and failing the clerkship.

How to Complete WBA

1. Get the student's unique form. There are two ways:
 - a. Scan the students' QR code using the photo function to scan the QR code. The student's unique assessment form will appear on their web browser
 - b. Open the email from the student. The URL to their unique assessment form will take you to the form.



Click here

2. Confirm with the student that the form has loaded on your device



For information on the WBA process and form:
[Training Video on WBA in Clerkship \(3:04 min\)](#)

Please pause before completing this evaluation and read below.

To proactively address unconscious bias, we ask that you take a moment to reflect on the following perspectives:

- Focus on a shared, common identity between you and the trainee by asking the learner about interests and activities that you have in common
- Use examples that counter identity group stereotypes. Who does this learner remind you of that is successful?
- Take the perspective of the same identity group as the learner (e.g. "walk in their shoes").
- Consider the opposite: when data point to one conclusion, briefly look for data supporting the opposite conclusion before making a final decision.

Survey Completion
0% 100%

Next

3. Take a moment to reflect on what you have in common with the student. This helps reduce unconscious bias in grading.

For information on the WBA process and form:
[Training Video on WBA in Clerkship \(3:04 min\)](#)

Please pause before completing this evaluation and read below.

To proactively address unconscious bias, we ask that you take a moment to reflect on the following perspectives:

- Focus on a shared, common identity between you and the trainee by asking the learner about interests and activities that you have in common
- Use examples that counter identity group stereotypes. Who does this learner remind you of that is successful?
- Take the perspective of the same identity group as the learner (e.g. "walk in their shoes").
- Consider the opposite: when data point to one conclusion, briefly look for data supporting the opposite conclusion before making a final decision.

Survey Completion
0% 100%

Next

4. Confirm that the picture and student name on the survey is correct.

The following assessment is for:



Wilma Wildcat

Please proceed if the information above is correct.

Student photo

Student name

5. Ask the student which EPA they want to be assessed on. The EPA list is available on the form (page 2).

Please select the EPA-based skill to be assessed:
(This form includes only EPAs 1-3, and 5-9.)

- EPA 1: Gather a History and Perform a Physical Examination
- EPA 2: Prioritize a Differential Diagnosis Following a Clinical Encounter
- EPA 3: Recommend and Interpret Common Diagnostic and Screening Tests
- EPA 5: Document a Clinical Encounter in the Patient Record
- EPA 6: Provide an Oral Presentation of a Clinical Encounter
- EPA 7: Form Clinical Questions and Retrieve Evidence to Advance Patient Care
- EPA 8: Give or Receive a Patient Handover to Transition Care Responsibility
- EPA 9: Collaborate as a Member of an Interprofessional Team

6. Observe and/or assist the student in completing the presentation, task or procedure.

7. Using the form, complete the assessment of the student. You may use speech-to-text to enter in comments.

What does this student need to work on to become more independent?

Please be specific and try to limit your comments to 1 or 2 sentences. You may use speech-to-text to complete this question.

8. Before selecting Submit, to prevent student cheating, please enter in your name, identification number, and email. It is preferred the identification number be your University of Arizona ID (see the front of your CatCard), though it can also be your clinical site ID.

My contact information is:

First Name
Last Name
Email

Please indicate at least one of: your UA Net ID, or your institution name and ID:

I am a:

- Faculty
 Resident
 Preceptor faculty at community site

9. Once submitted, a confirmation email will come to your inbox. If you receive a completed form but do not remember assessing a student, please email the Assistant Director of Clerkship, Julie Sherwood (juliesherwood@arizona.edu).

< Inbox ^ v

CA Curricular Affairs 9:27 AM
To: SIDNEYDONZELLA@email.arizona.edu >

Thanks for completing the WBA Form!

Dr. Donzella:
Thank you for completing a WBA (workplace based assessment) for one of our medical students in the Neurology clerkship.
If you have any questions about the assessment, or if you believe you have received this message in error, please contact: WBAAdmin@email.arizona.edu.

Thank you!
Curricular Affairs
UArizona College of Medicine-Tucson

Should you encounter issues obtaining WBA assessments, please let the clerkship coordinator and/or director know, or the Assistant Director of Clerkship, Ms. Julie Sherwood (juliesherwood@arizona.edu), or the Associate Dean of Curricular Affairs (corralj@email.arizona.edu). The transition to a new form of assessment is a transition for all, and we are here to support everyone's growth.

WBA Dashboard

Accessing your WBA dashboard

Each student will have a personal, secure WBA dashboard. Clerkship directors and coordinators will have a summative dashboard, showing all students within their specific clerkship. Curricular Affairs staff have a summative dashboard showing all students in all clerkships.


To access the dashboard, please see the unique URL sent to you by IT. It is highly advised you save this URL in your browser bookmarks, as well as the email from IT in your bookmarks folder. Clerkship directors, assistant clerkship directors, and coordinators will have access to the summative dashboard for their clerkship. New or additional personnel in the clerkship can be granted access by making a request to IT. As per policy, as personnel accessing the dashboard must complete FERPA training first and should a student worker access the dashboard, as per policy, they cannot apply to the MD program at UACOMT for 12 months from their last date worked.

If you encounter issues, please email WBAAdmin@email.arizona.edu

Orientation to the WBA dashboard

The dashboard provides a summary of the key information needed to ascertain if students are meeting the minimum requirements for the WBA part of their grade, as well as see their progress over time. The clerkship dashboard view is a summary of this information for all students in your specific clerkship.

A sample dashboard with fake student data is below:



**Clerkship:
Medicine**

EPA# ▼
All ▼

Rotation ▼
All ▼

Rater Role ▼
All ▼

Rater Last Name ▼
All ▼

Student Name ▼
All ▼

Date ▼
12/29/2020 1/12/2021

WBA Student Requirements: Complete an avg of 2 WBAs weekly and by the end of the clerkship complete 4 different EPAs, and receive ratings from 2 different attendings* and 2 different residents*
 Legend: **red** = requirement has not been started, **yellow/orange** = requirement partially completed, **green** = requirement completed *except FCM and Peds community clinics per policy

Weekly WBA Frequency by Student

Student Name	Sunday, December 27, 2020	Sunday, January 3, 2021	Sunday, January 10, 2021	Total
Dyo Student 2	4	6	2	12
Enas Student 1	1	1	2	2
Tria Student 2	1	1	1	2
Tria Student 3	7	13	6	26
Total	12	21	9	42

WBA Requirements by Student

Student Name	# of EPAs Completed	# of Unique Attending Raters	# of Unique Resident Raters
Dyo Student 2	4	5	2
Enas Student 1	1	1	2
Tria Student 2	1	5	2
Tria Student 3	7	7	4
Total	7	7	4

Feedback and Comments

Date	Student Name	Rater Name	EPA	WBA Rating	Feedback	Complexity Explanation
1/6/2021 5:25:01 PM	Tria Student 3	Omikron	EPA 6: Provide an Oral Presentation of a Clinical Encounter	I directed them from time to time	Not much. Her history was complete and well-organized. Her differential diagnosis was reasonable, and she was able to justify it fairly well - though as her preceptor notes there were considerations that she perhaps hadn't picked up upon that with experience would become more apparent.	The pt had multiple comorbidities related to a complex underlying medical condition.
1/12/2021 5:25:01 PM	Tria Student 3	Omikron	EPA 6: Provide an Oral Presentation of a Clinical Encounter	I directed them from time to time	Not much. Her history was complete and well-organized. Her differential diagnosis was reasonable, and she was able to justify it fairly well - though as	The pt had multiple comorbidities related to a complex underlying medical condition.

of WBAs completed this week

(Blank)

Total # of WBAs completed

42

Total # of EPAs

7

Total # of Complex

10

Dashboard Features:

Section 1: Filters. Click on the drop-down arrow to select what which filtered data to display. To remove the filter, click on the selected item again. You can apply multiple filters at once to create a more precise review of the data.

Section 2: Weekly WBA frequency by student. At a glance, you can see which students are meeting the minimum requirement of 2 EPAs per week. This visual will continue to grow horizontally as the weeks go on so you can track progress longitudinally. This is particularly useful for midpoint and end of rotation discussions.

Section 3: WBA requirements by student. At a glance, you can see which students are on track to meet the minimum EPA and rater requirements. This is particularly useful for midpoint and end of rotation discussions.

Section 4: Feedback and Comments. The comments entered by the attending or resident on each WBA can be reviewed, searched, and filtered.

Section 5: Summary of Minimum Requirements. This panel provides a quick overview of the minimum metrics students must meet to pass the clerkship. Use the filters to get more precise details.

WBAs and the Mid-Clerkship Formative Feedback Form

How to complete the mid-point feedback form for each clerkship

In addition to the traditional questions on the Mid-Clerkship Formative Feedback Form, questions related to the WBAs have been added.

Students are required to have their dashboard loaded on a device (phone, tablet, laptop, etc.) and to filter their dashboard to correspond to the appropriate clerkship. Students will show their dashboard to the evaluator so that they can accurately complete this section of the form. If the student is concerned about experiencing technical difficulties when presenting the dashboard, they can provide screenshots of the dashboard within 24 hours prior to the meeting and present the still image.

A sample of the WBA-related questions on the Mid-Clerkship Formative Feedback Form is provided below:

Workplace-based assessment: Check-In

Is the student meeting the minimum requirements of:

At least 2 WBAs submitted per week, for each week so far in the rotation? ___ Yes ___ No

On track to be assessed on at least 4 different EPAs seen by the end of the rotation: ___ Yes ___ No

On track to be assessed by at least 2 faculty and 2 residents by the end of the rotation: ___ Yes ___ No

Written Comments: *What clinical progress/growth is noted in the student's WBAs to date?*

Frequently Asked Questions

Why are we doing WBA?

WBA is a reliable, valid form of assessment in use in medical education for over ten years. WBAs are used to provide regular assessments of student progress across Entrustable Professional Activities. The transparency in student progress, the autonomy provided to the student, reduction in bias in grading, and alignment with our school's competency-based education philosophy were all reasons approved at TCCS and TEPC committees to adopt WBAs for clerkship.

How are Students Coached to Ask Faculty and Residents to complete a WBA?

Asking for feedback is a natural part of our professional days, and a key tool in our professional growth. Acknowledging the power differential between students and faculty, fellows, or residents, there are several resources to assist with this:

https://www.youtube.com/watch?v=Hc7oFYqnWz8&list=PLnyL-OBNCHtJJTk7Zzqu3NeA_OqtnhrL6

In addition, students will have a practice session in Transitions to Clerkship.

How will students and I know how well they are doing on achieving the minimum requirements?

The dashboard is available to clerkship leadership and students at all times to search and review progress to date. Midpoint clerkship meetings should incorporate a time to focus on if students are meeting the minimum requirements, and discuss a plan on how to they can achieve the requirements.

Do WBAs need to be completed in the first week of a clerkship block?

For clerkships starting with a week of virtual learning, simulation or other activities, students are not responsible for 2 WBAs that week, though they may choose to use simulation events as a way of practicing asking for feedback using the WBA form. That is, the average of 2 WBAs per week applies only to the number of weeks focused on clinical encounters.

Can a student complete WBAs all in one week or in a shortened time in the clinical interaction weeks?

No. The point of WBAs is to continually seek feedback and show growth over time. Students therefore need to be collecting WBAs across each week of clinical interaction within a clerkship block.

What if a student misses one WBA in a week? Can they make it up?

There are no formal WBAs labelled "make up" WBAs. As per policy, students must complete an average of 2 WBAs for each week of patient interaction throughout each clerkship. One way students can be confident they meet the minimum requirement of 2 WBAs per clinical interaction week is a student may opt to do more WBAs in any one week so there is an overall higher number of WBAs, which contributes towards an average of 2 per week.

Can a student make up WBAs after a clerkship block has finished?

Students can not make up WBAs after the clerkship has finished. “Extra” WBAs completed in one clerkship cannot roll over to another clerkship. Failure to meet the minimum requirement of 2 per week of clinical encounters will result in a grade of a 0.

What if a student doesn't complete the minimum required WBAs, EPAs, or variety of assessors?

As per policy, students would receive a grade of 0 for this part of the clerkship grade.

Who do I contact if I need help with the WBA form or dashboard?

Please email WBAAdmin@email.arizona.edu with any technical issues regarding the WBA form or dashboards.