

## "preparedEPA-App" - info sheet for postgraduate training centers affiliated to the Swiss College of Surgeons

### 1. What are EPAs, and what is the "preparedEPA" app?

In the coming years, the Swiss Institute for Postgraduate and Continuous Medical Education (SIWF/ISFM) wants to align the current postgraduate medical education curricula according to competencies. With "entrustable professional activities", so-called EPAs, the progress in postgraduate medical education shall be shown (M. Brodmann: Schweizerische Ärztezeitung 2022; 103(6):169; <https://www.siwf.ch/siwf-projekte/cbme.cfm>).

The "preparedEPA Assessment System" (or "preparedEPA" for short) is a digital tool developed by Adrian Marty, MD, MME, with the support of the University Hospital Zurich, to assess EPAs and document them as workplace-based assessments. preparedEPA is user-friendly and practice-oriented and easy to use in everyday clinical practice. The app is already successfully in use at various hospitals in Switzerland, Germany and the Netherlands.

The Swiss College of Surgeons (SCS) has decided to introduce competency-based postgraduate medical education nationally by means of EPAs using the preparedEPA app. For this purpose, the SCS has concluded an attractive agreement with precisionED AG, the operator of preparedEPA, and all SCS-affiliated specialty societies can now record EPAs of the Core Surgical Curriculum (CSC), as well as those of specialty-specific continuing education. This allows a longitudinal monitoring of the competences of residents by the training centers (WBS) from the beginning of the training until the achievement of the specialist title.

### 2. How does «preparedEPA» work?

preparedEPA works with two roles:

- **"Trainees"** are physicians in postgraduate training to become specialists. Point 5 (below) describes how trainees must proceed in order to use preparedEPA.

- "**Supervisors**" are the persons who evaluate the physicians in postgraduate training with regard to the EPAs. As a rule, these are attending physicians. Point 6 (below) describes how supervisors must proceed in order to use preparedEPA.

In order to ensure the quality of the EPAs, only physicians who have sufficient professional qualifications (see below) and are familiar with the evaluation of young colleagues should be granted supervisor status. The training institution assigns supervisor status.

To see how it works, please refer to the provided **workflows** from preparedEPA, which explain the different functions of the tool based on **screenshots**. The SCS in collaboration with precisionED AG supports the training institutions in the implementation of preparedEPA with instructional material, instructional videos and with free **online tutorials**. To register your participation in one of the free online tutorials, please scan the below QR code and fill out the registration form.



### 3. What do training institutions need to do to introduce "preparedEPA"?

This is simple and requires only a few minutes:

1. Fill in the registration form on [this form](#) (or scan the QR code below and click on "to the training center subscription form"). In the form you have to provide information about the training institution, the responsible persons and the number of supervisors and trainees. Among other things, you must also indicate whether the training institution covers the licensing costs for preparedEPA, or whether the trainees must cover the licensing costs themselves.



2. Once the registration form is completed, it can be conveniently submitted online. By submitting the registration form, the training institution bindingly registers for the use of preparedEPA.
3. After submitting the registration form, the training institution will be activated in the "preparedEPA" systems. The activation usually takes 1-2 working days. As soon as this is done, the training institution will receive a notification. Afterwards, the use of "preparedEPA" can be started immediately.

4. The training institution has to name one or more persons as administrators for the "Admin-Portal" in the registration form. These persons are responsible for the approval of the supervisor status in the admin portal. More about this below.
5. The training institution will receive an invoice for the onboarding and, if applicable, licensing fees (see "What does preparedEPA cost, and who pays?" below). The invoice is due for payment within 30 days.

#### 4. How does the "Admin Portal" work?

The admin portal is only accessible to the persons specified by the training institution as administrators. It is recommended to apply for administration rights for at least two persons per training institution.

The administrators can **manage the supervisors of the training institution** in the admin portal, i.e., activate or reject the supervisor status on request, but also revoke the supervisor status.

To ensure the quality of EPA-based evaluations, it is important that only persons are selected as supervisors who are qualified for this task and meet the following requirements:

They are in possession of a medical specialist title or are about to become specialist.  
They have the responsibility of supervising physicians in postgraduate training at their respective WBS

They are familiar with the use of the preparedEPA tool through internal and/or external training.

The administrators are responsible for ensuring that only supervisors who meet the above requirements are activated.

#### **To be activated as an administrator, proceed as follows:**

1. Future administrators must be registered with preparedEPA as a user (trainee; supervisor only if they are effectively a supervisor) and choose a password.
2. In the registration form (see 3.1 above) for preparedEPA you have to indicate who will be the administrator. **Important:** Because the administrator login is technically linked to the preparedEPA account, the same information (surname, first name, e-mail) must be entered as for the preparedEPA account.
3. Afterwards precisionED grants the administrators the administration rights.

#### **To log into the admin portal, proceed as follows:**

1. Use the following link: <https://adminportal.prepared.app/>
2. After that you will get to the following screen:



Email Address or Username \*

Password \*

[Forgot Password](#)

Login

Log in with your preparedEPA e-mail address and your preparedEPA password.

3. Afterwards you can manage the supervisors in the admin portal

## 5. How do residents ("trainees") need to proceed in order to use "preparedEPA"?

Downloading and registering for preparedEPA requires only a few clicks:

1. Download the preparedEPA app from the Apple or Google Play Store (scan QR code).



2. Start registration under "Sign Up":

- We recommend using your private e-mail address to register as a trainee. This facilitates a later change to another training institution.
- Select "Surg-prepared" as the version if the Core Surgical Curriculum is being completed.
- "Institution": name of the training institution you are working at (e.g., LUKS).
- Select "Trainee" as your role
- Please indicate when you started your postgraduate training. This information is necessary for research questions.
- In addition, there are a few optional demographic questions

3. Start your first assessment

The download of "preparedEPA" is free of charge. However, there are license fees for the use of preparedEPA. If your training institution covers the license fees, you can use preparedEPA free of charge. Otherwise, you will be charged the license fees of CHF 9.80/month (excl. VAT).

## 6. How do attending physicians ("supervisors") have to proceed in order to use "preparedEPA"?

Downloading and registering for preparedEPA requires only a few clicks:

1. Download the preparedEPA app from the Apple or Google Play Store (scan QR code).



2. Start registration under "Sign Up":
  - We recommend using the institution's email address to register as a supervisor.
  - Select "Surg-prEPARED" as the version if you exclusively supervise residents of the Core Surgical Curriculum. If you yourself work mainly in a surgical specialty, you can also register (if available) in a specific surgical preparedEPA version, e.g., "VascSurg-prEPARED". By registering in the surgical specialty version, you will automatically receive supervisor privilege for the general Surg-prEPARED version as well.
  - "Institution": Name of the training institution you are working at (e.g., LUKS).
  - Select "Supervisor" as your role.
  - Please indicate when you started your first position as attending physician. This information is necessary for research questions.
  - Additionally, there are a few optional demographic questions.

Before you can start with assessments of trainees, your supervisor status must be confirmed by the administrator of your training institution. Please contact the appropriate person if the activation does not take place. If you have any questions or problems, please contact the preparedEPA team at [info@prepared.app](mailto:info@prepared.app).

3. Start your first assessment

For supervisors the use of preparedEPA is *free of charge*.

## 7. Who can be contacted for technical problems?

If you experience technical difficulties in any of the steps described above, the preparedEPA team will be happy to assist you at [info@prepared.app](mailto:info@prepared.app).

The same email address can also be used for suggestions or feedback on preparedEPA. We love to hear from you!

## 8. What does "preparedEPA" cost, and who pays for it?

In order to use the preparedEPA app, precisionED AG must first integrate the training institution into the preparedEPA systems. A one-time onboarding fee is due for this. The onboarding fee depends on the size of the training institution (number of "supervisors" who assess EPAs) and has to be paid by the training institution.

Onboarding fee per training institution (in CHF):

Number of supervisors	Onboarding fee per training institution
Up to 5 (« <b>Extra Small</b> »)	CHF 450.-
6-10 (« <b>Small</b> »)	CHF 850.-
11-20 (« <b>Medium</b> »)	CHF 1`450.-
More than 20 (« <b>Large</b> »)	CHF 1`950.-

All prices are exclusive of VAT at 7.7%.

Specialty societies are free to cover these onboarding fees for their WBS in toto. In such a case, the specialty society should contact precisionED in advance of implementation.

License fees are also applicable for the use of preparedEPA. The **license fees are generally charged to the residents ("trainees")**. The license fee is CHF 9.80 (excl. VAT) per month and resident.

The SCS recommends the training institutions (or alternatively the specialty societies) to cover the license fees as a sign of appreciation for the trainees and to conclude a license agreement with precisionED AG for the implementation of preparedEPA. Thus, the use of preparedEPA will be free of charge for the residents of the respective training institution or specialty society during the term of the license agreement. The license agreements for training institution or specialty societies have a term of 12 months.

If the license fee is covered by the training institution or a specialty society, the license fee is only CHF 8.30/month/resident (excl. VAT). The license fee for training institutions (or specialty societies) is lower because the administrative effort in billing is significantly lower for precisionED AG.

*No license fee* is charged for supervisors.

License fees per Trainee:

	License covered by institution (or specialty society)	Individual license for trainees
Per month	CHF 8.30	CHF 9.80
Per year	CHF 99.60.-	CHF 117.60

All prices are exclusive of VAT at 7.7%.

## 9. How can I switch between the role of trainee and supervisor?

Constellations are possible in which the same person is both trainee and supervisor; e.g. physicians who are already specialists in one field but want to obtain another specialist title. For this purpose, they become "trainees" again.

preparedEPA offers the possibility to switch quickly between the two roles. This works as follows:

1. Click on "Settings" at the bottom right
2. Then select "Edit"
3. Then scroll down to "Role" and change the role from "Trainee" to "Supervisor" (or vice versa). Then click on "Save".
4. Done - now you can act in the new role

## 10. Frequently asked questions

### *1. What if I don't have a cell phone or my cell phone doesn't have WIFI signal?*

preparedEPA can be used as a mobile app or as a web application. However, the initial registration for preparedEPA must always be performed via mobile app. After that, preparedEPA can be used on any regular PC with internet access. The address of the web application is [epa.prepared.app](http://epa.prepared.app).

Note: Logging into the web application and the assessments via the web application are always initiated by the trainees.

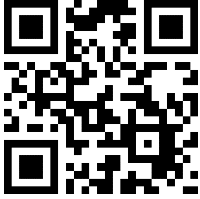
### *2. Are there any differences between the preparedEPA app and the web app?*

Yes, there is. First of all, registration for preparedEPA is currently only possible via the mobile app. With the web application, the workflow is also somewhat different: Because a QR code cannot be scanned with a PC, the assessments take place serially and not in parallel as with the mobile app version of preparedEPA. The learning objectives are also not visible in the web version.

In addition, only trainees should log into the web app. This is because the assessment in the web app must always be done by the trainee first. Only then does the supervisor perform the assessment in the same profile.

### *3. Where can I download preparedEPA?*

The preparedEPA app can be downloaded from the Google Play Store or Apple Store. The QR code leads directly to the corresponding store, regardless of the smartphone type.



### *4. What if I don't have an Android or iPhone?*

Currently, the preparedEPA app is only available for Android and iPhone. In Switzerland, however, this covers practically 100% of users. For users of other operating systems, the web app is available. The login to preparedEPA can be done from any Android or iPhone.

### *5. Why does the role of the supervisor have to be approved by the training institution?*

To ensure the quality of the assessments, it is important that only qualified supervisors submit assessments. The training institution can approve supervisors via the admin portal.

### *6. Who can become a supervisor?*

Attending physicians with the corresponding specialist, who are responsible for the supervision of residents and have been trained with the "preparedEPA" tool through external or internal training, should take on this role. They must be approved by the administrator. The administrators must also ensure that the list of activated supervisors is always up-to-date. If a supervisor leaves the training institution, the supervisor status of the respective person must be revoked.

### *7. What happens with my data?*

Data protection is central to preparedEPA. The assessment data collected via preparedEPA belong to the trainees and are transmitted in encrypted form to a web server located in Switzerland. All data is therefore stored in Switzerland. Only selected members of the preparedEPA team have access to the data via 2-factor authentication. If data is used for research purposes or for statistics, it is aggregated and pseudonymized so that it can no longer be traced back to an individual person.



*8. What happens to my EPA profile when I leave a training institution?*

Residents can take their personal EPA profile with them wherever they go! This is especially helpful if the following training institution also works with preparedEPA. Then you can pick up right where you left off. If the new training institution is not yet using preparedEPA, self-assessments can still be performed. If the management of the new institution is interested in using preparedEPA as well, they can contact us any time at [info@prepared.app](mailto:info@prepared.app).

*9. What happens to my EPA profile if I stop paying the license fees?*

The profile remains visible and is stored on a secured server for 10 years. This allows you to reactivate your personal EPA profile later, if desired.

*10. Why do only the trainees have to pay for preparedEPA, but not the supervisors?*

Trainees gain the greatest benefit from preparedEPA. Trainees benefit from frequent feedback conversations and following personal progress transparently in their individual competency profile. They can show this profile at any time, which is particularly useful when changing jobs or working with new supervisors. Furthermore, specific and actionable learning goals can be formulated and shared.

*11. Can I also document my EPAs at a later date?*

Theoretically, this is possible. However, various studies have shown a so-called "recall bias" if the assessment is not performed immediately after the clinical situation has been carried out. It is therefore advisable to perform the assessment as soon as possible after the performance of an EPA. Preferably immediately afterwards, in the first quiet moment, but certainly on the same day.

*12. Why do I have to share my EPA profile with my superiors?*

Sharing the EPA profile is optional, but highly recommended - this allows for tailored teaching and supervision. You can also share the profile only for a certain period of time.

*13. My supervisor does not see my learning goals even though I have shared my EPA profile.*

All learning goals a supervisor has documented for you initially end up in the "Suggested learning goals" in-box. If you as a trainee decide to accept the learning goal, you have to

actively move it to "My goals" with one click. Only those learning goals in the list "My goals" will be shared with the supervisor together with the EPA profile.

If you do not want to accept a learning goal or if you have completed a learning goal, you can archive it by swiping left.

*14. How can I view only the EPAs from the Core Surgical Curriculum (CSC)?*

On the "Profile" page, the filter icon can be clicked on the top right and then the box "SCS Core Surgical Curriculum" can be selected. Then you will only see the EPAs of the Core Surgical Curriculum.

*15. The change from trainee to supervisor does not work. What is the problem?*

If you follow the procedure described above for the change, it should work. In some cases, it may be necessary to close the preparedEPA app completely after changing the profile and then open it again. This should activate the new profile.

*16. How can I perform a self-assessment?*

This is quite simple. After selecting the EPA, a "Document self-assessment" field appears below the QR code. Simply click on it and then enter the self-assessment. The workflow then leads you to a self-reflection and at the end you can directly enter a learning goal.

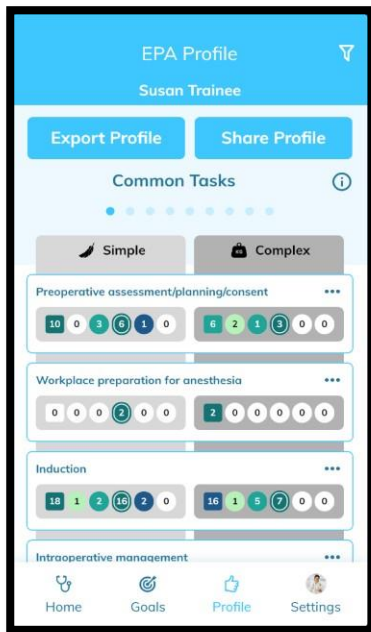
Alternatively, a self-assessment can also be started by selecting an EPA under "My Curriculum".

*17. What kind of information can I get from the EPA competency profile?*

The color-coded preparedEPA competency profile contains a lot of useful information. Don't worry. At the beginning, the abundance of information can be confusing. However, once you start working with preparedEPA, the profile will feel familiar very quickly.

The EPA Competency Profile contains the following information:

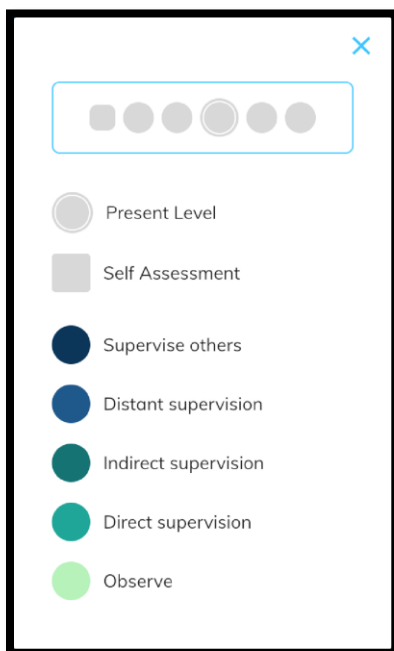
- Each **row** shows a specific EPA
- The left **column** shows assessment data for situations classified as "Simple"; the right **column** shows assessment data for situations classified as "Complex".



Each EPA contains the following information:

- The **rectangle** represents self-assessments. The number indicates the number of self-assessments for the EPA, and the color coding of the rectangle reflects the "Level of Supervision" according to the self-assessment.

The preparedEPA app works with the following color codes:



- The **circles** represent the assessments by the supervisor and show the "Level of Supervision" for this EPA. The numbers in the circles show the number of assessments received from supervisors for the specific EPA. The circle with a white border marks the current competence level.

The 5 circles represent the 5 assessment levels for EPAs (with increasing autonomy from left to right):

**Supervise others** (dark blue)

= Supervision provided by the trainee to more junior colleagues: trainee supervises a more junior trainee to execute the task

**Distant supervision** (blue)

= Execution by the trainee, the supervisor is not in the room. Supervisor needs to be actively involved by the trainee and is available within 20-30min

**Indirect supervision** (dark green)

= Execution by the trainee, the supervisor is scrubbed in and helps, answers questions, and assists if prompted (reactive supervision)

**Direct supervision** (green)

= Execution by the trainee. Trainee knows consecutive steps of procedure. Supervisor supports directly and proactively

**Observe** (light green)

= Trainee is scrubbed-in and assists actively. Does not operate him/herself