Milestones 2.0 Transition Checklist

Preparation Stage

☐ Download and review new milestone for your program from ACGME (including supplemental materials). Visit https://www.acgme.org/Specialties/ for more details.

☐ Form an Evaluation Redesign Committee to compare & contrast old to new milestones.

☐ Redesign Committee – maps new milestones (e.g. by rotation, by PGY, and how each milestone is evaluated).

☐ Redesign Committee – Review and update goals and objectives for each rotation (PGY specific) to align with new milestones.

☐ Redesign committee – share new milestone with attendings, CCC, trainees, and others within program.

Transition Stage

☐ Import new milestone on MedHub.
   ☐ Programs will import new milestones by default. Please reach out to your GME program manager if your program has questions on this process.

☐ *Update or recreate evaluation forms on MedHub – [PD to choose best option]
   ☐ Option #1 - Update existing evaluation forms by retagging with new milestones. This is recommended if the wordings of your evaluation questions are not the same as the original milestones sub-competencies.
   ☐ Option #2 - Make new evaluation forms and tag milestones. This is recommended if the wordings of old milestones sub-competencies were directly used as your evaluation questions.

☐ Disseminate new milestones among faculty and trainees (e.g. milestone changes frequency of feedback, and evaluation methods).

View GME Workshop Recording

Recording Link: https://stanford.zoom.us/rec/share/nDxR1FYp_5Vrr3I09RFww_qEfs0D-Yrpj5iyk5IUb6wMJJpDdOB2mN8SYwFVK.Mc8vqL02fAzqEkRj
PCs – MedHub Milestone Update Guide

Instruction for MedHub administrators (primarily PC) to update their MedHub evaluation form and ensure program is ready for new milestone by the next CCC meeting.

Step 1 – Update your Program’s Milestones


While updating, ignore the warning as shown below. Programs will be able to set their own custom end date for old milestones (see step 7). GME Program Managers can also update program milestones if requested.

Step 2 – Relabel old Milestones

Old milestones need to have a different ID and it is recommended you relabel them as “(Old)” or other naming variation. This will make updating/creating your evaluation form easier and identifying old & new milestones easier.

MedHub location: MedHub Home ➔ milestone management ➔ Subcompetencies tab ➔ “Modify” button
Step 3 – Verify New Milestones are Correct

Program should confirm that their new milestones have been updated correctly, especially the active period.

MedHub location: MedHub Home ➔ milestone management ➔ Subcompetencies tab

<table>
<thead>
<tr>
<th>Competency</th>
<th>ID</th>
<th>Subcompetency</th>
<th>Package</th>
<th>Active Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patient Care</td>
<td>PC-1</td>
<td>Death Investigation</td>
<td>Forensic Pathology v2.0</td>
<td>7/1/2021 - Present</td>
</tr>
</tbody>
</table>

Step 4 – Set Your Program’s Default Milestone Scale

Setting the default milestone scale will set the scale for new evaluation questions. This will save time and ensure all future evaluations will use the same scaling system. You can always change the scale for individual questions afterwards.

MedHub location: MedHub Home ➔ Milestone management ➔ Milestone settings (tab) ➔ Default Subcompetency scale

Step 5 – Find All Evaluations Using Old Milestones

Identify all active evaluations tagged to old milestones; this will make referencing and updating your evaluation forms easier.

Look at the all evaluation forms linking old milestone by clicking on the number under “tagged questions”. The number lists how many evaluation forms are linked to the corresponding milestone.

MedHub location: MedHub Home ➔ Milestone management ➔ Milestone settings (tab) ➔ Number under “Tagged Questions” Column

<table>
<thead>
<tr>
<th>Competency</th>
<th>ID</th>
<th>Subcompetency</th>
<th>Package</th>
<th>Active Period</th>
<th>Status</th>
<th>Linked Efforts</th>
<th>Linked Elements</th>
<th>Tagged Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patient Care</td>
<td>PC-1</td>
<td>Medical Interview and Physical Examination of Adult Allergy and Immunology Patients</td>
<td>Allergy/Immunology PA</td>
<td>7/1/2020 - Present</td>
<td>Active</td>
<td>5</td>
<td>5</td>
<td>Yes</td>
</tr>
</tbody>
</table>

A list of forms tagged with the sub-competency will be shown.
Step 6 – Decide How Evaluation Forms Are Updated

Depending on the nature of your current evaluation forms, you will either (1) update your existing form by retagging to new milestones or (2) create new evaluation forms with new milestones. Programs should make new evaluation forms if the wordings of your evaluation questions are the same as the original milestones sub-competencies. Below is MedHub’s pros and cons of each option:

Option #A – Updating Existing Forms

**Pros**
- Effort required
- Fully utilize the new functionality for tagging
- Do not need to create new forms (may be important for reporting)

**Cons**
- May need to manually update headers
- Updating headers will change appearance of completed evaluations

Option #B – Create New Evaluation Forms

**Pros**
- Header descriptions will flow in automatically
- Protects the previously submitted forms (if updating headers with 2.0 language)

**Cons**
- Effort required
- Will technically be a separate form (may be negative for reporting)

Option #A – How to Update Existing Forms By Retagging With New Milestones

1. Go to your evaluation form from MedHub home ➔ Evaluations (tab) ➔ Select your evaluation form under Modify/Print Form dropdown box.
2. Click on each question and update the subcompetencies & competencies. Note – There will be a version column that will help you identify old & new milestones.

3. Delete/edit descriptive headers to the answer scale to a specific question
   - On your question, you want to change the descriptive header by clicking on “Scale Descriptions” under the Answer Type Column. Delete/edit the headers from here and click on update header descriptions. You can also change the header for all questions in the same evaluation form using the same scale by clicking on “Propagate these descriptions through all questions of this answer type”.

Option #B – How to Create New Evaluation Forms with New Milestones
For programs that have evaluation questions the same as milestone questions (directly evaluating milestones). When making evaluation questions, programs will (1) make one question at a time or (2) add multiple questions directly tagged to milestones via “Batch Add Milestones Question(s)”. The “Batch Add Milestones Question(s)” method have benefits of adding multiple milestones at once and saving time. Create new evaluation form by going to MedHub Home ➔ Evaluations (tab) ➔ “New Evaluation Form” button ➔ Complete fields and click on Create Evaluation Form.
Create your Questions and tag with new milestones

a. Create questions by (1) adding one question at a time - Useful if you are carrying questions over from your old evaluation or want a question not directly assessing milestones (e.g. short text response). You’ll need to add your question, answer type, Subcompetencies, and competencies.

b. Create questions by (2) adding questions via “Batch Add Milestones Question(s)” – useful if you want to directly evaluate questions to milestones (be sure to complete step 2)
beforehand) and adds multiple milestone evaluation questions at once. Once you click “Batch Add Milestones Question(s)”, select all the new milestones. Verify your milestone scale is correct.

![Questions/Header Table]

*Set evaluation form (design) to locked for evaluation delivery.* Once form has been sent out and completed by evaluators, your evaluation form questions can no longer be edited.

![Design Selector]

**Step 7 – Discontinue Old Evaluation Forms (if applicable)**
- If your program is discontinuing these evaluations: set all old evaluation forms to inactive (not archive) to discontinue use.

![Status Selector]

**Step 8 – Set old milestones to inactive**
Once your program has fully transitioned to the new milestones, set the accurate end date for your old milestones.

*MedHub location:* MedHub Home → milestone management → Subcompetencies tab → “Modify” button
Active Period Start Date*: 07/01/2020
Active Period End Date:  

Milestone Process Flow Chart

Update Milestone [Process Start]

Step 1: Update To New Milestone

Step 2: Relabel Old Milestones

Step 3: Verify Milestones Are Correct

Step 4: Set Your Program’s Default Milestone Scale

Step 5: Find All Evaluations Using Old Milestones

Step 6: Decide: How Are Evaluation Forms Updated

Update Existing Evaluation Form Via Retagging Milestones

Make New Evaluation Form

Decide: How Are Questions Created

One Question Created At A Time
Batch Add Milestones Question(S)

Step 7: Discontinue Old Evaluation Forms

Step 8: Set Old Milestones To Inactive

Update Milestone [Process End]

Use the flow chart below for reference. Underlined texts are linked to their corresponding topic.
Milestones Reporting

What would the milestone summary page look like if both old and new milestones are active?

- Old and new milestones will be shown together on the Milestone summary with version number easily distinguishing the two. You can also refer to the ID and active period.

<table>
<thead>
<tr>
<th>ID</th>
<th>Subcompetency</th>
<th>Version</th>
<th>Active Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Old) SBP-1</td>
<td>Coordination of patient care within the health care system</td>
<td>V1</td>
<td>7/1/2010 - Present</td>
</tr>
<tr>
<td>(Old) SBP-2</td>
<td>Patient Safety and Quality Improvement</td>
<td>V1</td>
<td>7/1/2010 - Present</td>
</tr>
<tr>
<td>SBP-1</td>
<td>Patient Safety and Quality Improvement</td>
<td>V2</td>
<td>7/1/2021 - Present</td>
</tr>
<tr>
<td>SBP-2</td>
<td>System Navigation for Patient-Centered Care</td>
<td>V2</td>
<td>7/1/2020 - Present</td>
</tr>
</tbody>
</table>

MedHub location: MedHub Home ➔ Milestone Management ➔ Milestone Summary tab

What would the Progress Reports page look like with both active old and new milestones?

- Old and new milestones will be shown together, and you’d only be able to distinguish with ID; be sure to relabel the old milestones. [Click here](#) for relabeling instructions.

<table>
<thead>
<tr>
<th>ID</th>
<th>Subcompetency</th>
<th>Far below expectations for PGY level</th>
<th>Below expectations for PGY level</th>
<th>Meets expectations for PGY level</th>
<th>Exceeds expectations for PGY level</th>
<th>Far exceeds expectations for PGY level</th>
</tr>
</thead>
<tbody>
<tr>
<td>(OLD) PC-01</td>
<td>Pre-anesthetic Patient Evaluation, Assessment, and Preparation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(Old) PC-02</td>
<td>Anesthetic Plan and Conduct</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PC-1</td>
<td>Invasive Cardiovascular Testing</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PC-2</td>
<td>Non-Invasive Testing</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>


How do I aggregate milestone reports to include old and new milestones and what milestone reports should I use?

- The Milestone report’s date range needs to capture the milestone’s active date ([click here](#) to learn how to modify milestone active date) and you can differentiate milestones based off of the
version column. The two milestone reports to aggregate milestones are: (1) Milestones NAS Summary Report and (2) Milestones Summary by Level. The (1) Milestones NAS Summary Report is for getting the milestone summary (average & range) of a date range while the (2) Milestones Summary by Level is for getting milestone summary of each year for trainee(s). Programs should run report (2) Milestones Summary by Level if program’s milestone scale assessments focus on expectation levels (e.g. meets expectation level for PGY).

Milestones NAS Summary Report – Example

<table>
<thead>
<tr>
<th>Title:</th>
<th>Version</th>
<th>Active Period</th>
<th>Milestone Level (AVG)</th>
<th>Range</th>
<th># Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gathers and synthesizes essential and accurate information to define each patient’s clinical problem(s).</td>
<td>V1</td>
<td>7/1/2010 - Present</td>
<td>2.6</td>
<td>2.0 - 3.0</td>
<td>5</td>
</tr>
<tr>
<td>History</td>
<td>V2</td>
<td>7/1/2021 - Present</td>
<td>n/a</td>
<td>n/a</td>
<td>0</td>
</tr>
</tbody>
</table>

Milestone Summary by Level – Example

<table>
<thead>
<tr>
<th>Subcompetency</th>
<th>Version</th>
<th>Active Period</th>
<th>PGY Level 1</th>
<th>PGY Level 2</th>
<th>PGY Level 3</th>
<th>PGY Level 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gathers and synthesizes essential and accurate information to define each patient’s clinical problem(s).</td>
<td>V1</td>
<td>7/1/2010 - Present</td>
<td>2.6</td>
<td>1 - 3</td>
<td>2930</td>
<td>2.6</td>
</tr>
<tr>
<td>History</td>
<td>V2</td>
<td>7/1/2021 - Present</td>
<td>0.0</td>
<td>0 - 0</td>
<td>0</td>
<td>0.0</td>
</tr>
</tbody>
</table>

MedHub location: MedHub Home ➔ Reports tab ➔ under “Evaluation Reports” section
Frequently Asked Questions

Is there a video guide I can follow?
• Yes – Video recording is here [https://stanford.zoom.us/rec/share/Fm9zpjinnoaq7qKBM33jiMtXSDl5GZjiOY5PVJbnH4mm3ioA2_oYi8MntmT6Cvuj.gzMLzlzDLnOa6le?start=1627401553000](https://stanford.zoom.us/rec/share/Fm9zpjinnoaq7qKBM33jiMtXSDl5GZjiOY5PVJbnH4mm3ioA2_oYi8MntmT6Cvuj.gzMLzlzDLnOa6le?start=1627401553000)

What should I do if my questions aren’t covered in this instruction guide?
• Please reach out to your GME program managers - [https://med.stanford.edu/gme/gme_team.html](https://med.stanford.edu/gme/gme_team.html)

How can I change the questions of my current/old evaluation forms?
• You cannot change the questions if your evaluation form has been sent out and completed. You’d have to make a new evaluation form if you want any changes.

How do I add a short text box?
• When creating your question, select the short-text response or long-text response for answer type.

Will I lose my old milestone data?
• No, your old milestone data will still be available. To ensure you have all milestone data for your CCC, you’ll need to accurately set the end of your old milestone. Click here to learn how to edit milestone dates.

Do I have to use the new milestones on MedHub?
• GME strongly recommend programs use your program’s new milestones to match ACGME’s milestone activation period. Having updated evaluations will ensure your program have supportive data in your milestone reporting to ACGME.

Is there a deadline I should have the new Milestone ready on MedHub?
• There is not a firm deadline; the earlier your program begins using the new milestones, the better.

How can I transition to the expectations scale?
• Changing your milestone evaluation scale from the traditional 1-5 to expectations have the advantage of being easier to interpret for evaluators and CCC members. The optimal expectations scale would be a 5 pts. scale to match with the 5 pt. milestone framework. The scale below “Milestones – Far below expectations to Far exceeds expectations for PGY level” is a good option since it is a 5 pt. scale with option for Not Observed. Please browse the list of subcompetency scale and contact MedHub support if you’d like a new scale created for your program.
After you set your default sub competency scale, all your future milestone evaluation questions will automatically have your expectation scale but may still have the scale descriptions of your milestones. To remove your scale descriptions, see the next question below. For aggregating evaluation scores, use (1) Milestones NAS Summary Report and (2) Milestones Summary by Level. Milestones NAS Summary Report will give you a milestones summary (average & range) by your specified date range while the Milestones Summary by Level is useful in giving you milestone summary of each year for trainee(s). Click here for more information on milestone evaluation reports.

How do I make Entrustable Professional Activities (EPAs)?

• Creating and tagging EPAs to milestone is possible on MedHub. To enable this feature, you must enable EPAs from MedHub Home → Milestone Management → Milestone Settings → Check “Track Entrustable Professional Activities (EPAs)”. You’ll now have a new tab called EPAs in Milestone Management to create your EPAs and tag to milestone(s). Tag milestones to EPAs by clicking on column “Linked Subcompetencies”. From there, you’d make evaluation questions and tag your EPA to the question; this is like tagging milestones to an individual evaluation question.

How do I make an EPA report?

• You’d run the report Milestones NAS Summary Report and check EPAs under “Milestones to include”.
Additional links

- MedHub Milestone video update guide - https://stanford.zoom.us/rec/share/Fm9zpIlnnqag7qKBM33jMtx5Sl5GZjiOY5PVJbnH4mm3iO2_oYi8MnntmT6Cvj.guzMLzlzDLnOa6le?startTime=1627401553000
- ACGME Milestone page - https://www.acgme.org/what-we-do/accreditation/milestones/overview/
- MedHub Updating Milestone 2.0 document - https://stanfordmedicine.box.com/s/hu19u6ya0b68frvrbaj4twss95cap30q

Watch Supplementary Video Update Guide
https://stanford.zoom.us/rec/share/Fm9zpIlnnqag7qKBM33jMtx5Sl5GZjiOY5PVJbnH4mm3iO2_oYi8MnntmT6Cvj.guzMLzlzDLnOa6le?startTime=1627401553000