
An Electronic Portfolio System for Physicians - Thinking Nationally, Acting Locally?

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Session Plan

- Introduction
 - Background about Portfolios
 - Large Group Discussion
 - Summary/Wrap-Up
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Current Portfolio Initiatives

- Medical Schools - Several developing or using portfolios
 - Residents- Several programs developing or using portfolios, plus ACGME is planning to build a national system
 - Practicing Physicians - Several specialty societies and specialty boards are planning or developing portfolios
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What Are Portfolios?

- Systems that gather and compile complex data sets and generate derivative analyses and reports that can satisfy a variety of functions
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Possible Functions of Portfolios

- Presentation of learning objectives (by competency, status in training)
 - Demonstration of proficiency (by discipline, system, competency, or status)
 - Self-assessment (for test prep, score prediction, strengths and weaknesses)
 - Reflection (narrative, peer-to-peer)
 - Report-Outs (for academic advancement, credit, job application)
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Importance of Defining Function

- Function determines the data needed
- Example: Demonstration of Proficiency might include results of:
 - ◆ End-of-course exams
 - ◆ National exams
 - ◆ OSCE/SP or psychomotor simulations
 - ◆ Observed behaviors (e.g. professionalism, communication skills, teamwork)
 - ◆ Observations and judgments of peers, faculty and mentors

Importance of Defining Function 2

- Function also drives the compilations and reports generated, and other offerings
- Example: Self-Assessment for strengths and weaknesses could involve:
 - ◆ Provision of appropriate test
 - ◆ Reporting of score and subscores
 - ◆ Inclusion of norms (local and national)
 - ◆ Report-outs (e.g. to school, third parties)
 - ◆ Targeted offerings of e-learning (e.g. for clarification, or remediation)

Importance of Defining Function 3

- Lack of clarity on Portfolio function has
 - ◆ Diffused development (seen one? seen one!)
 - ◆ Inhibited transportability across the continuum & inter-operability between schools and programs
 - ◆ Led to parallel terminology e.g. Learning Systems, Reflective Practice, Alternative Assessment
 - ◆ Discouraged psychometricians from getting constructively involved
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Creation of a Sand Mandala



Expungement of Sand Mandala



Importance of Transportability and Inter-Operability

- This session is primarily about Portfolios for UME
 - But the basic issues are equally relevant for GME and the practicing physician
 - Portfolios must be transportable across the training: practice continuum
 - Portfolios (component data, compilations and reports) should also be inter-operable between schools & programs
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How to Achieve Transportability and Inter-Operability?

- Collaborative Development of Portfolios
 - Avoid building new super-repositories
 - Fast-track creation of specifications and standards for data-sharing
 - Involvement of organizations and ?financing at a national level
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Collaborative Development

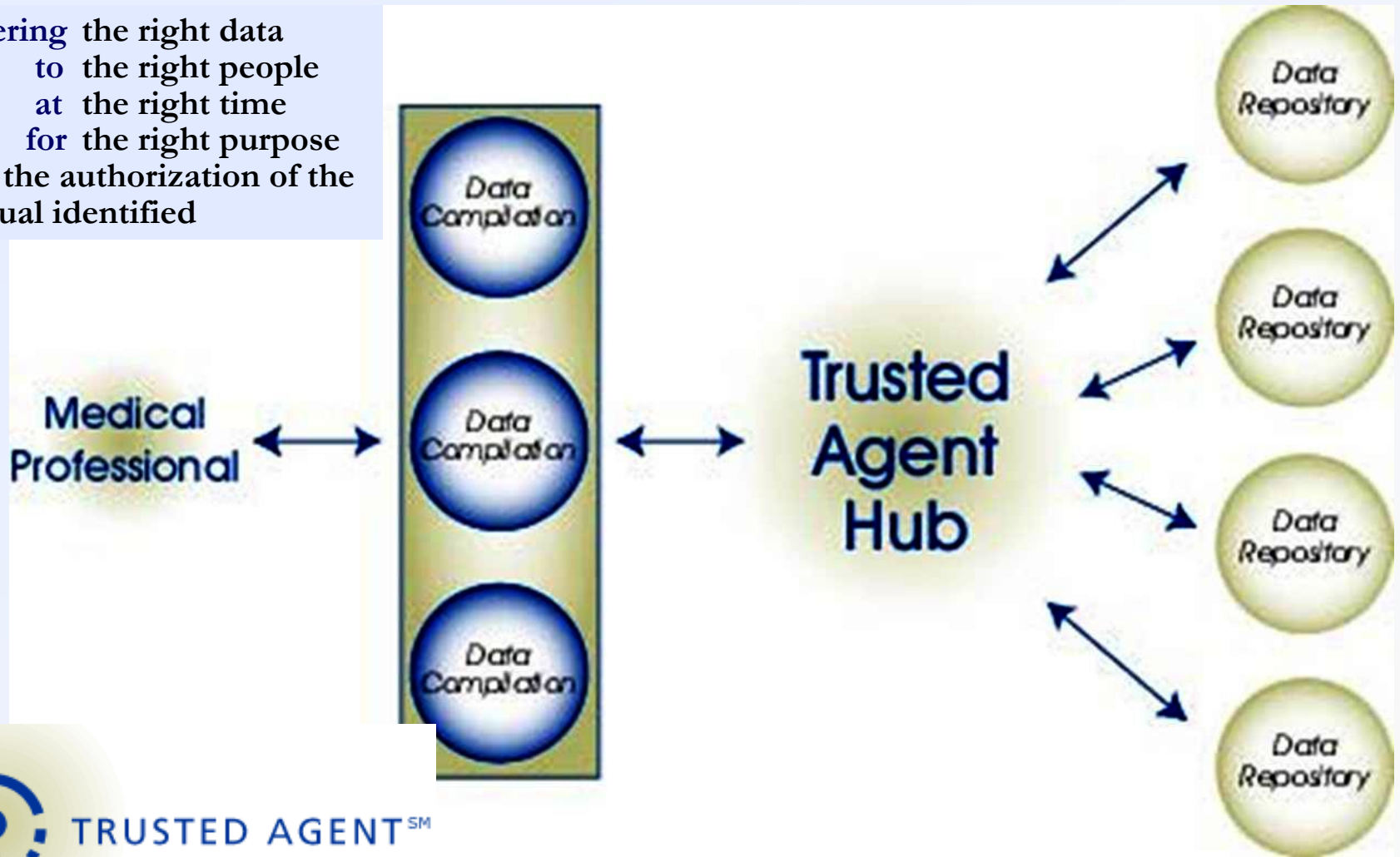
- The AAMC and NBME plan
 - ◆ Colloquium May 30-31, 2007
 - ◆ Invitational Conference October 1-3, 2007
 - ◆ Consensus-building on terminology, next steps
 - ◆ Self-organization of a community of interest
 - ◆ Definition of research agenda, feasibility pilots
 - This process must include robust involvement of UME and GME communities
 - Aiming for standardization nationally while allowing local flexibility and customization
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Avoid New Super-Repositories

- Gather copies of needed data where possible from existing repositories
 - Previous inter-operability issues can be bypassed using web services and XML schema
 - Compilations are done in real-time, reported out and expunged (important for confidentiality)
 - Reduces risks of “big brother” perceptions, easier legal discovery and data-refresh problems
 - One example of this is the recently-piloted Trusted Agent data-sharing infrastructure
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Trusted Agent: General Concept

Delivering the right data
to the right people
at the right time
for the right purpose
...with the authorization of the
individual identified



TRUSTED AGENTSM

www.trustedagent.org

Create Standards for Portfolios

- Standards exist for sharing of clinical data (e.g. HL-7) but not yet for data related to learning
 - To create specifications and standards, need to convene consensus panels with
 - ◆ Active Portfolio developers
 - ◆ Large data repositories
 - ◆ Standards organizations (e.g. Medbiquitous)
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Summary

- Interest in portfolios has exploded across the training; practice continuum
 - We must now collectively order further development to avoid a Tower of Babel
 - This will require both a standardizing influence nationally and strong involvement locally to ensure the ability to tailor and experiment with systems
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Relevant Questions

- Are there other portfolio applications?
 - Is there a role for the GEA?
 - What is the proper role for other national organizations?
 - How can Medical Schools get involved and build on the good work already done?
 - ◆ Clearing house for relevant experiences
 - ◆ Community of interest
 - ◆ Player in development & standardization
 - ◆ Sponsor of feasibility pilots
 - ◆ Strong role in setting research agenda
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