

# 2009-12-04

## Meeting Information

<b>Date:</b>	December 4, 2009
<b>Time:</b>	8 PST/11 EST/16 GMT/17 CET

Please note: the conferencing service will ask you to enter the pound sign. Press # for pound.

Attending: Kim Hoffman, Chair; Valerie Smothers, Staff; Tim Brown, Carol Carraccio, Gwen Garrison, Bob Galbraith, Simon Grant, Linda Lewin, Amber Montañano, Pat O'Sullivan, Morgan Passiment, Kevin Souza, Sandra Waters

## Agenda Items

### 1 Review [minutes](#)\*of last call\*

The minutes were approved.

### 2 Report from [Academic Difficulty/Leaves of Absence small group](#)

Pat summarized that her small group looked at leave, academic difficulty, and remediation. With regard to leave and withdrawal, the group decided to have a dichotomous field and a comment field. The group had a long discussion about remediation and decided to omit remediation from the educational trajectory. There are legal restrictions around what can be shared with regard to leave and academic difficulty. The group decided that it was up to the individual what was shared.

Kim summarized that leave would be categorized as institution requested or personal request and that there would be a free text field. She asked if the group considered other categories previously discussed. Pat replied that they did not, mainly because of how the data would be used in support of transition to residency. Kim asked whether free text would be optional. Pat commented that the group had not discussed that. She added that the approach offered was in the interest of avoiding misrepresentation and protecting privacy. Carol added that she liked the idea of the learner being able to use the free text field to explain and put a positive spin on the leave.

Linda commented that the Medical Student Performance Evaluation (MSPE) has a checkbox regarding interruptions in education as well as a sentence by the dean's office. She questioned whether the privacy issues were different if it was up to the student to release the data and whether it would be helpful to have the leave further codified.

Pat commented that the small group could not think of a reason to codify. A field like health reasons is vague. If the institution mandated the leave, that could be a forced leave based on health reasons. Or the learner could have chosen leave because of financial reasons. Who made the decision is important.

Sandra commented that free text fields are difficult to query. If you want to do analysis, someone has to read and interpret the field. Pat commented that technology is changing and free text scoring is improving.

Kim asked what questions should be posed to the larger group. She suggested that free text being mandatory or optional was one for the larger group to consider. Simon commented that mandatory free text is difficult to enforce because a question mark would be sufficient to complete the mandatory requirement from a technical perspective. Valerie commented that from a non-technical perspective there were policy issues to consider. Making the comment field mandatory could be a policy decision that the group wanted to set. Kim added that we have a responsibility to educate others on the use of the specification. She would favor highly encouraging people to explain a leave of absence.

Carol added that it would be positive for learners to take a stand on their leave and it would alleviate anxiety on the part of residency programs. Kim commented that they have forms that have mandatory comments. From a technical perspective you can put in a question mark, but the requirement does cajole people into adding more.

Kim asked Pat's group to consider language we could use to describe that. Pat agreed to further work with Valerie to define that.

Bob added that the codification of the data may change over time. We are codifying data that hasn't been dealt with in the past. Initially, free text may be okay.

### 3 Report from [Technical Architecture small group](#)

Kevin described the work of the technical architecture small-group. The group looked at how well leap 2A, a specification for portfolios, could help with our educational trajectory project. University of California at San Francisco (UCSF) uses Mahara, an Eportfolio tool that has adopted leap 2A. The group began with a discussion of standard lists of reference values. They agreed to standardize as much as possible. He added that this is the beginning of a long process. We will gather real data and improve codifying lists over time. The group agreed that where relative we should include free text descriptions. It will be important to note the date time stamp of trajectory contributions as well as the source of such contributions. He added that for the pilot we would be assuming that the data is coming from the school and not tackling it yet. The group is focusing on leveraging leap 2A to describe activities and developing custom categories for those activities. The next step is to take the Pat scenario and create a sample data set which can then be put into leap 2A. Ucsf will then put this into Mahara and see how it looks.

Kim asked the group to describe leap 2A and what it does for the group.

Simon commented that it is a specification for user related information. It is built on top of the atom specification for blog feeds. The fundamental unit of atom is the blog entry. Leap adds features that educational trajectory would be able to leverage, such as the activity class. The educational trajectory group can reuse and tailor the specification to its needs. Adam has the ability to link entries to one another and to external things. It also provides a facility for categorizing. Some standard category schemes may or may not be useful. Additional category schemes maintained by MedBiquitous could address the group's requirements.

Kevin added that the group also clarified what leap 2A does and doesn't cover. It addresses learner owned data and data about the learner primarily.

Simon added that the new specification is being developed in the coming year. He expects to have medical bodies involved. It would be natural to take on MedBiquitous requirements that are shared by other users.

Kim asked Valerie what Pat's data would look using the specification.

Valerie explained that a blog is like a web diary with entries on different dates. A profile is much like a blog in that it provides the learner a chance to reflect on their environment or on an activity. What we are proposing is using the specification for describing the blog entry to describe different types of activities. There would be dates associated with that activity as well as categories that would enable the development of a diagram similar to the one developed for Pat.

Simon added that leap envisions that people will be able to attach files. You can also link in video. Valerie added that there's also the ability to reference competencies which will be important.

Kim commented that one of the items of feedback from the AAMC related to the medical school verifying activities. She asked if there would be an opportunity for institution verification.

Kevin agreed that this was important to look at but added that it was not being addressed for the pilot. Pubmed ID had been suggested as something to facilitate verification.

Carol asked if there was the capability to create a workflow for learner initiated transfer of data. Simon commented that depending on the requirements, they could build something in. Digital signatures would likely be necessary for verification.

Kevin questioned how ongoing verification would happen, particularly after an individual leaves an institution.

Kim commented that we are canceling the December 18 meeting. The next meeting will be January 15. We will look for small-group updates on that call.

#### **4 Updates to Use Cases\* ([word version](#))\***

Kim asked Valerie to describe the updates she and Bob had made to the use cases. Valerie commented that it was a minor adjustment. We've added that term local portfolio system to indicate the portfolio housed at an academic institution. The Efolio system will be a central system that manages access to data housed in local portfolio systems. That is a long-term vision. Linda asked how individual institutions would set of auxiliary portfolio systems.

Bob commented that there will likely be a central system because organizations will band together for added functionality to move data. This will sit on top of existing systems. Many schools have local portfolio systems that serve their needs, but none of the systems talk to one another. This would be the first of many technical specifications allowing data to move between schools and other organizations. The central system would allow login and authorize data flow.

Linda asked if each institution would be to have a separate system to feed into this. Bob commented that they would not. One option is to provide a service-oriented architecture and to expose data with the user's authorization. Another is to push the data outside the school to a holding repository. Regardless, some changes would be need to made in order to link into a central system.

Simon commented that in other domains there could be local and central systems within a single institution. In addition, the local and the central system may be the same. Bob agreed saying that he is trying to be flexible to encompass a variety of solutions.

Kim commented that other schools need to hear the conversation. She asked Bob if he could explain this next Friday as well. Bob agreed offering to be explicit about the concept in the letter for medical schools and include a status report as to where we are headed.

#### **5 Report on communicating with pilot schools and deans**

Kim commented that schools are asking how much work the pilot would be locally. A discussion of that question would help them gain local advocates.

## **Decisions**

The recommendations of the small group on leave of absence/academic difficulty were accepted.

## **Action Items**

Pat will work with Valerie to further describe the free text fields and how they are to be used (optional, required, or recommended).

The technical subgroup will work to develop an example and to test that example in Mahara.

**The December 18 call is canceled. Our next call will be January 15.**