# E-folio Interoperability Initiative Educational Trajectory Pilot Overview for Technical Leads

The eFolio Interoperability Initiative (EII) is a collaborative project to pilot technical standards for a core set of data describing a learner's portfolio. The EII is piloting technical standards describing a learner's educational trajectory through medical school. The goal of the pilot is to demonstrate that data about a learner's educational trajectory can be extracted from institutional systems, put in a common format, and sent to other organizations in furtherance of the learner's academic and career goals.

The following categories of data will be collected for the entering class of 2005:

- Dates of study
- Extracurricular activities
- Leaves of absence
- Academic difficulty

The following are the technical steps necessary to prepare data for the pilot.

|  | Task | Timeframe |
|---|---|---|
| 6a | Download draft Educational Trajectory specification and excel template from http://groups.medbiq.org/medbiq/display/ET/Home | 12/18/2009 |
| 6b | Participate in group kickoff call. | 12/14/2009 – 12/18/2009 |
| 6c | Identify data to be exported within your system(s) | 12/18/2009 – 1/8/2010 |
| 6d | Map the data element names used in the system to those used in the specification | 12/18/2009 – 1/8/2010 |
| 6e | Identify any incongruities between the existing data and the specification | 12/18/2009 – 1/8/2010 |
| 6f | Develop a strategy for addressing incongruities between the existing data and the specification | 12/18/2009 – 1/8/2010 |
| 7 | Make recommendations for specification revisions if necessary | 12/18/2009 – 1/15/2020 |
| 8 | Participate in a call with other medical schools to share lessons learned. | 1/8/2010 – 1/15/2010 |
| 9a | Export data for entering class of 2005 in XML or in an excel-compatible format, such as csv. | 1/15/2009 – 2/12/2009 |
| 9b | Make any modifications necessary to make the data conform to the specification. If you are using XML, an XSLT stylesheet can programmatically make the modifications. | 1/15/2009 – 2/12/2009 |
| 9c | Bring data from multiple sources together into a single excel or XML document. You may use the school's identifier for the student as the unique identifier for the learner in the educational trajectory dataset. | 1/15/2009 – 2/12/2009 |
| 10 | Participate in a call with other medical schools to discuss any barriers or challenges to completing the export process. | 1/29/2009 |
| 11 | Upload data to NBME secure website (TBD) | 2/15/2009 |

Any questions regarding the technical specifications may be sent to Valerie Smothers at vsmothers@medbiq.org.

We will likely schedule a project kickoff call in Mid-December to discuss the project with technical leads from each participating medical school.

Educational trajectory data likely resides in multiple systems within an institution. Below are some possible systems where relevant data may reside. Data needed may change depending on how the specification evolves.

| System | May Contain |
|---|---|
| School Portfolio | Self-selected evidence of competency learning with critical reflection and mentor feedback |
| ISIS (Integrated Student Information System) | Degree programs, extracurricular learning, academic difficulty, gaps in study |
| Curriculum Management System | Competency related curriculum and modality |
| Clinical Course Scheduling System | Clinical training |

**6 Begin export/compilation process**

We'll start the data collection portion of the pilot with a project kickoff call with the technical leads from each school.

Schools will start exporting the data from the applicable systems and compiling the data into 1) an Excel spreadsheet using the template developed in Task 5 or 2) an XML file conforming with the schemas and specifications developed by the MedBiquitous Educational Trajectory Working Group.

For purposes of this pilot, we will exchange data for the entering class of 2005, defined as: *Anyone who was accepted for matriculation for the entering class of 2005 regardless of degree program.*

For each system serving as a source of educational trajectory data, the data analyst will:

- Identify data to be exported
- Map the data element names used in the system to those used in the specification
- Identify any incongruities between the existing data and the specification
- Develop a strategy for addressing incongruities between the existing data and the specification

As the export/compilation process proceeds, any incongruities or technical challenges should be brought to the attention of the group so that barriers can be addressed appropriately. One school may have a solution or strategy that could benefit other schools, or revision of the specification may be necessary.

**7 Revise spec as needed**

If in the process of compiling the data the project team identifies incongruities with the specification or mistakes, the working group will revise the specification to address those problems. The project team will be informed of the revisions and decide whether or not to implement the revision for purposes of the pilot test. If revisions are not implemented, a workaround may be suggested.

**8 Share lessons learned from task 6**

To encourage a common approach to common problems, the project team will have a call to share the technical lessons learned from the compilation and export process to date. The group will learn from one another and facilitate further progress on the project. The steps the team has undertaken, along with any strategies used for export or compilation, will be noted for publication in a best practices guide.

**9 Continue export compilation process**

The project team will take the lessons learned from task 8 and complete the export process. The data analyst will take the following steps.

- Export data from a source system in XML or in an excel-compatible format, such as csv.
- Make any modifications necessary to make the data conform to the specification. If you are using XML, an XSLT stylesheet can programmatically make the modifications.
- Bring data from multiple sources together into a single excel or XML document. You may use the school's identifier for the student as the unique identifier for the learner in the educational trajectory dataset.

**10 Technical discussion among pilot participants**

Midway through step 9, the data analysts and other technical members of the team will have a teleconference to discuss any barriers or challenges to completing the export process. Team members are welcome to share any technical difficulties with the group via email in advance of the call and after the call.

**11 Upload data to NBME secure web site**

Once the export and compilation is complete, the school will upload the educational trajectory data file to an NBME secure website. The website will accept the data and allow authorized users from the school to view the data uploaded. The system may offer additional benefits, including aggregate statistics on the school's data.

Ultimately the system will allow graphical displays of learner trajectory and residency program access to view learner data, provided the learner has authorized such access.