Appendix F: Evaluation Tools/Entrustable Professional Activities (EPAs)

HIV PRIMARY CARE PATHWAY: 6 Months Report on Entrustable Professional Activities (EPA)

Name of the person completing this form:	
Title/Position:	
Trainee name, level of training:	
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EPA #1: Perform HIV counseling & testing including legal & disclosure issues

Lev	vel 1	Lev	rel 2		Level 3		el 4	Level 5	
√	Unable to accurately counsel patients on Universal or "opt-out" HIV testing	√	Understands HIV testing procedure but cannot implement	✓	Able to perform counseling & testing with supervision in	√	Able to perform counseling & testing in a culturally competent fashion in an	✓	Able to initiate & disseminate universal counseling & testing effectively to patient
✓	Unable to implement culturally competent language when explaining testing procedures		appropriate counseling procedure, treatment plan or complete		traditional scenario but unable to adapt counseling & testing procedures in more challenging		unsupervised setting using appropriate language & provides complete documentation in the	✓	care in routine clinical practice within your health care community Becomes an advocate
✓	Unable to provide evidence for need for universal testing for patients based on guidelines regardless of risk category	✓	documentation of counseling & testing Understands HIV law & available resources but unable to	✓	cases Aware of ancillary services available to assist patients with test results & make appropriate	√	medical record & reporting requirement Able to interpret test results & understands when additional testing may be necessary	✓	for routine testing in appropriate clinical settings Role model & teaches learners the techniques of
✓ ✓	Unable to develop & discuss treatment plans based on testing results Demonstrates lack of		implement culturally competent language when	✓	referral Able to perform counseling about stigma & disclosure	✓	Independently initiates referral to ancillary services depending on test results (health	✓	culturally competent counseling & testing. Role model & teaches learners the
	knowledge of HIV law related to confidentiality & disclosure, & available		explaining HIV law related to confidentially & disclosure		with supervision but unable to apply in more challenging cases		department notification, social services involvement, partner notification)		techniques of culturally competent counseling & HIV status disclosure
✓	resources Unable to develop & discuss plans for disclosure & coping with stigma	✓	Unable to properly document counseling & testing in the medical record	✓	Aware of ancillary resources available in this regard & can make appropriate referrals	✓	Able to communicate results & initial treatment plan to patient & care team	✓	Able to act as an advocate for patients with HIV related stigma & discrimination.

	National HIV	Residency	/ Pathway	Consortium	Toolki
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Comment:

EPA #2: Assess person with newly diagnosed HIV infection

Level 1	Level 2	Level 3	Level 4	Level 5
✓ Unable to recognize & assess newly diagnosed HIV infection despite guidance, the provision of a template, & orientation to the assessment.	✓ Identifies some symptoms & signs associated with new HIV infection or chronic HIV infection but does not accurately characterize entire syndrome. ✓ Unable to appropriately stage patient with necessary panel of blood tests or interpret baseline lab tests including HIV genotype testing.	✓ Understands when to initiate opportunistic infection prophylaxis & antiretroviral therapy but unable to choose the appropriate therapeutic regimen. ✓ Accurately interprets HIV disease staging tests.	 ✓ Develops a plan to initiate OI prophylaxis when indicated ✓ Able to interpret baseline genotype testing ✓ Develops a comprehensive therapeutic approach to initiate antiretroviral treatment & monitor clinical response & adverse effects to therapy. ✓ Responds sensitively & non-judgmentally to patient disclosures, diversity in gender identity, age, culture, race, religion, disabilities, & sexual identity 	✓ Tailors newly diagnosed HIV assessment to particular patient's presentation & clinical circumstances. ✓ Considers patient preferences & education level when devising a treatment plan

Not Assessed: "

EPA #3: Counsel persons with HIV on reducing high risk behaviors

Level 1	Level 2	Level 3	Level 4	Level 5
Unable to recognize high risk behaviors in context of HIV & STI transmission & management. ✓ Unable to stage patient motivation to change high risk behaviors.	 ✓ When prompted, can identify & delineate high risk behaviors but unable to regularly assess patients for these risks ✓ Can engage in motivational interviewing with patients around highrisk behavior but unable to regularly & reliably supply patient with counseling based on this assessment 	✓ Understands need for risk assessment counseling & can explain rationale to patient. ✓ Able to regularly ask questions to probe for ongoing high-risk behaviors for HIV & STI transmission. ✓ May miss elements of sexual history taking ✓ May miss opportunities for counseling but effective in 60-80% of encounters. ✓ Able to assess patient stages of change according to Stage of Change model ✓ Able to perform appropriate counseling strategies for patient's stage of	Regularly incorporates questions about ongoing high-risk behavior at every session (80-95% of encounters) ✓ Able to ask open ended questions about behaviors & ask closed ended questions to refine details around types of sexual encounters ✓ Able to accurately determine target risk behavior & assess Stage of Change in all patients. ✓ Accurately relates appropriate counseling for that Stage of Change & usually solicits an action plan.	Effectively incorporates risk reduction questioning & intervention into every new & recurrent encounter (95-100% of opportunities). Able to identify & prioritize high risk behaviors & accurately assess patient's stage of change. Effective with stage-specific counseling & action plans. Regularly defines an action plan & follows up. Trouble-shoots very complex high-risk behaviors & serves as a resource for the clinic in this regard
		change.	✓ Follows up plan during future	

,	✓	Variably effective in	encounters & tailors	
		following up on	approach	
		behavioral outcomes		

EPA #4: Provide behavioral health & substance use disorder management in the clinical setting

Level 1	Level 2		Level 4	Level 5		
✓ Displays incomplete knowledge & understanding of natural history & risk factors for mental health & unhealthy substance use in person with HIV (PWH) ✓ Incomplete understanding of screening tools for mental health & substance use disorder ✓ Unable to identify mental health & unhealthy substance use in PWH	✓ Understands the natural history of mental health & unhealthy substance use ✓ Displays incomplete knowledge of screening techniques, treatment eligibility & options	Level 3 ✓ Demonstrates knowledge of mental health & substance use disorder screening tools ✓ Demonstrates working knowledge of treatment options including various counseling techniques & pharmacotherapies ✓ Aware of area resources for referral for management of mental health & substance use disorders ✓ Able to work in an inter-professional	✓ Effectively manages PWH with mental health diagnoses or unhealthy substance use ✓ Demonstrates proficiency in managing complex cases including patients with both mental health & unhealthy substance use ✓ Effectively implements consultative services for patient management when needed	✓ Educates patients & families on natural history of mental health and/or unhealthy substance use & reviews treatment considerations ✓ Monitors adverse effects to treatment ✓ Acts as a role model & educates other members of the health care team on mental health & unhealthy substance use screening & management ✓ Conducts quality		
		team to adequately		improvement projects		

✓ Displays lack of	manage patients with	✓	Works as an effective		and/or research
knowledge of	mental health and/or		member of the inter-		related to mental
available treatment	substance use		professional team		health and/or
options for patients	disorder				unhealthy substance
identified with mental					use in PWH
health and/or				✓	Able to lead an inter-
substance use					professional team
diagnoses & of side					
effects & drug					
interactions for					
pharmacotherapies to					
treatment mental					
health & substance					
use disorders in PWH					

EPA #5: Manage person with HIV in an ambulatory setting: Provide appropriate age-based & HIV-associated preventative services to persons with HIV.

Le	Level 1		Level 2		Level 3		Level 4		Level 5		
√	Demonstrates lack of knowledge of available HIV & ageappropriate prevention, diagnostic & treatment guidelines	✓	Demonstrates incomplete knowledge of available prevention diagnostic & treatment guidelines Demonstrates	✓ ✓	Demonstrates knowledge of age- appropriate immunization & cancer prevention management.	✓	Demonstrates knowledge & efficiency in age- appropriate preventive services. Able to discuss & document	✓	Educates patients & families on HIV & ageappropriate prevention Acts as a role model & educates other members of the health care team on HIV &		
√	Demonstrates lack of knowledge of age-appropriate immunization & cancer prevention management.	∨	incomplete knowledge of age- appropriate immunization & cancer prevention management. Able to use available	▼	Requires supervision to recognize adverse events & manage more complex cases Implements available patient educational material to counsel patients on side		immunization initiation & side effects as well as age-appropriate cancer screening with patients in a culturally competent	✓	age-appropriate prevention. Conducts QI projects and/or research studies on HIV-related age appropriate prevention		
			screening tools & patient education tools		effects & age- appropriate cancer screening but may use jargon and/or complex medical terms.		way & taking into account patients level of health literacy using appropriate educational tools	√	Updates & develops new patient educational materials as new guidelines emerge		

EPA #6: Manage person with HIV in an ambulatory setting: Initiate & monitor antiretroviral (ARV) treatment

Lev	vel 1	Lev	vel 2	Lev	vel 3	Lev	rel 4	Lev	rel 5
✓	Demonstrates lack of knowledge of available ARVs & treatment guidelines,	✓	Demonstrates incomplete knowledge of available ARVs &	✓	Demonstrates knowledge of available ARVs & treatment guidelines	✓	Demonstrates knowledge of available ARVs & treatment guidelines	√	Educates patients & families on ARV initiation, monitoring &
✓	of ARV side effects & drug interactions, & of monitoring response to ARV. Unable to accurately	√	treatment guidelines, ARV side effects & drug interactions, & monitoring response to ARV	✓	Demonstrates knowledge of ARV side effects & drug interactions but needs supervision to	✓	Demonstrates knowledge of ARV side effects & drug interactions & able to independently recognize	✓	adverse effects Acts as a role model & educates other members of the health care
	counsel patient on importance of treatment adherence; unable to implement culturally competent language	•	Unable to fully implement baseline step-wise checklist for initiating ARVs or to use available patient education	✓	recognize adverse events Demonstrates knowledge of monitoring response to ARV	√	adverse events in clinical practice Able to implement key elements from baseline step-wise checklist for initiating ARVs	✓	team on ARV initiation, monitoring & adverse effects Conducts quality improvement
✓	when discussing medication adherence with patients Unable to explain	✓	tools. Understands the importance of treatment adherence but unable to explain	√	Able to implement key elements from baseline step-wise checklist for initiating ARVs but not complete	√	Demonstrates no gaps in ARV initiation & monitoring—including interpretation of genotype resistance	✓	projects and/or research studies related to ARV management Updates &
	consequences of nonadherence to treatment including development of genotypic drug resistance	✓	it to patients Implements incomplete treatment adherence monitoring procedures, provides	✓	Understands importance of implementing genotype resistance testing but unable to alter treatment plan in more	✓ ✓	Comfortable with different ARV formulations to adapt to patient preferences & co-morbid conditions Able to discuss &	✓	develops patient educational materials as new therapies emerge. Able to Initiate & disseminate
√	Unable to develop & discuss treatment		incomplete documentation of		complex cases without supervision.		document ARV initiation & side effects with		treatment adherence

plans based on	discussions of	✓	Able to perform		patient in a culturally		counseling &
adherence measure	treatment adherence		treatment adherence		competent way &		monitoring
			monitoring with		considering patient level		techniques
			supervision in		of health literacy using		effectively to
			traditional scenario but		appropriate educational		patient care in
			unable to adapt		tools		routine clinical
			adherence discussions	✓	Demonstrates a patient-		practice within
			in more challenging		centered & cost-effective		their health care
			cases		approach to		community
		✓	Aware of ancillary		management of ARV	✓	Role model &
			services available to	✓	Provides complete		teaches learners
			assist patients with		documentation in the		the techniques of
			medication adherence		medical record regarding		culturally
		✓	Unable to properly		adherence discussions,		competent
			document treatment		able to independently		adherence
			adherence counseling &		alter treatment plans		counseling &
			monitoring in the		specific to individual		monitoring
			medical record		patient		

EPA # 7: Manage person with HIV & treatment of opportunistic infections (OIs)

Level 1	Level 2	Level 3 Level 4		Level 5
✓ Unable to accurately identify common Ols	✓ Recognizes need to consider OI	✓ Regularly recognizes risk for OI at various	✓ Monitors patients for the need for OI	✓ Monitors patients for the need for OI
seen in patients with advanced HIV & at	prophylaxis at various levels of	level of immunosuppression	prophylaxis.	prophylaxis.

- what level of immunocompromise state these occur.
- ✓ Unaware of indications for OI prophylaxis.
- ✓ Rudimentary recognizes of the proper differential diagnosis of OIs by clinical presentation.
- ✓ Unaware of any strategic timing with starting ARVs in patients with OIs

- immunosuppression but unable to provide adequate prophylaxis because not aware of what drugs are used, side effects, & monitoring
- Has some understanding of role of OI in differential diagnosis in PWH with common presentations of pneumonia, CNS infections & skin infections.
- ✓ Can sometimes but not regularly delineate appropriate diagnostic & management steps to these Ols.
- Understands issues around initiation of ARV in patients with OI but needs review & supervision.

- & can accurately delineate approach to provide prophylaxis.
- May miss some nuances of monitoring side effects of OI prophylaxis, required duration of prophylaxis.
- ✓ Considers appropriate differential diagnosis including OI in advanced HIV
- Demonstrates

 understanding of

 approach to diagnosis
 & management of Ols
- ✓ Understands the appropriate timing of ARV initiation in patients presenting with OI
- Expectantly manages immune reconstitution inflammatory syndrome (IRIS).

- Understands & explains effectively to patient's relative risks of OI prophylaxis & consequences if left untreated OIs & expected duration of primary & secondary OI prophylaxis.
- ✓ Demonstrates
 consistent &
 comprehensive
 approach to diagnosis
 & management of OIs
- ✓ Recognizes & adheres to published guidelines regarding the timing of ARV initiation
- ✓ Effectively counsels patients & teams about OI management including IRIS

- Fluent & expert in diagnosis & management of commonly encountered OIs as well as less common systemic OIs, OI etiologies not commonly seen in US, etc.
- Educates other health professionals on diagnosis, management & prevention of Ols.
- ✓ Recognizes nuances in timing of ARV initiation in setting of OI, manages paradoxic & unmasking IRIS effectively,
- Effectively explains to patients.

EPA #8: Manage person with HIV in an ambulatory setting

Level 1	Level 2	Level 3	Level 4	Level 5
✓ Demonstrates lack of knowledge & understanding of natural history of HIV disease complications & ART long term side effects ✓ Lacks knowledge of available diagnostic & treatment guidelines for metabolic syndrome (DM, Dyslipidemia, bone disease, etc.).	✓ Demonstrates knowledge & understanding of natural history of HIV disease complications & ART long term side effects ✓ Demonstrates incomplete knowledge of available diagnostic & treatment guidelines for metabolic syndrome (DM, Dyslipidemia, bone disease, etc.).	✓ Demonstrates knowledge of HIV metabolic syndrome diagnosis & treatment considerations ✓ Demonstrates knowledge of treatment side effects & drug interactions but needs supervision to adequately manage complex cases ✓ Able to identify situations where consultative services are necessary (ie, cardiology, endocrinology, etc.),	 ✓ Effectively manages patients with HIV metabolic syndrome ✓ Demonstrates proficiency in managing complex cases ✓ Effectively uses consultative services for patient management ✓ Counsels patients effectively on diet, exercise, & healthy lifestyle 	✓ Educates patient & family on HIV metabolic syndrome & treatment considerations & monitors adverse effects ✓ Acts as a role model & educates other members of the health care team on HIV metabolic syndrome management ✓ Conducts quality improvement projects and/or research studies related to HIV metabolic syndrome.

EPA #9: Management of HIV in special populations: Pregnancy/infertility

Level 1	Level 2	Level 3	Level 4	Level 5
✓ Unable to perform gynecologic assessment despite guidance, the provision of a template, & orientation to the specific history & physical examination skills ✓ Unable to identify treatment modalities for pregnant women with HIV	✓ Obtains accurate & relevant history for women's in an efficiently customized, prioritized, & hypothesis-driven fashion & identifies some problems ✓ Unable to independently perform a gynecological exam nor explore the measures to prevent pregnancy or HIV transmission. ✓ Demonstrate incomplete knowledge of management of pregnant women with HIV	 ✓ Performs formal gynecologic evaluation with minimal supervision, ✓ Identifies treatment modalities for pregnant women. ✓ Explains clearly different methods of contraception ✓ Recognizes drug adverse effects & interactions. ✓ Requires supervision to adequately manage PWH women with complex medical & social issues 	 ✓ Performs independently complete gynecologic assessment & discusses results with the patient. ✓ Develops plans to address treatment initiation & monitoring for pregnant women with HIV & communicates to patients & families. ✓ Adjusts medications to minimize risk of adverse effects or interactions, considers pregnancy & lactation implications ✓ Counsels clearly & non – judgmentally the risk of transmission of HIV to partner & infant. 	✓ Tailors assessment to particular patient presentation & clinical circumstances. ✓ Understands & attends to changes social issues, abnormal laboratory data & side effects to treatment. ✓ Discusses assessment & plan with interdisciplinary team the perinatal care

EPA #10: Management of HIV in special populations: HIV-HCV or HIV-HBV co-infection & multidisciplinary teamwork

Lev	Level 1		Level 2		Level 3		Level 4		Level 5	
✓	Demonstrates lack of knowledge & understanding of the natural history of HCV or HBV, disease progression, & appropriate diagnostic testing	✓	Understands the natural history of HCV an HBV in HIV coinfected patients but demonstrates incomplete knowledge of treatment eligibility	✓	Demonstrates knowledge of HIV-HCV or HBV coinfection treatment considerations Demonstrates knowledge of treatment side effects	✓ ✓	Effectively manages patients with HIV-HCV or HBV coinfection Demonstrates proficiency in managing complex cases Effectively uses	✓	Educates patients & families on HIV-HCV or HBV co-infection & treatment considerations & monitors adverse effects Acts as a role model	
✓	Unable to identify eligibility criteria for HCV or HBV treatment in patients with HIV coinfection Demonstrates lack of	✓	& options Demonstrates incomplete knowledge of HIV- HCV treatment interactions	√	& drug interactions but needs supervision to adequately manage complex cases Identifies situations where consultative	✓	consultative services for patient management Works as an independent & effective member of	√	& educates other members of the health care team on HIV-HCV or HBV treatment Conducts quality	
✓	knowledge of available HCV or HBV treatment options & treatment guidelines Demonstrates lack of knowledge of HCV or	✓	Demonstrates appreciation of the importance of the HIV multidisciplinary team in the management of HCV	√	services are necessary (ie, psychiatric, hepatology or transplant services) Able to work in an inter-professional team	✓	the inter-professional team Addresses issues related to patient care & develops an action plan with the team	√	improvement projects and/or research studies related to HIV-HCV or HBV treatment Able to lead	
	HBV treatment, monitoring, side effects & drug interactions		or HBV infection		to adequately manage patients with HIV-HCV coinfection	✓	Able to effectively lead a team meeting with minimal supervision.		independently an inter-professional team	

EPA #11: Management of HIV in special populations: LGBTQIA+ patients

Lev	Level 2		Lev	Level 3		Level 4		Level 5	
Lev	Unable to recognize patients who self-identify as part of the LGBTQIA+ community Unaware of clinical & psychosocial conditions of LGBTQIA+. Unaware of resources to improve access to medical & psychological care of LGBTQIA+ patients. Unable to model	✓ ✓	Establishes rapport & solicits sexual preference & gender identification in non-judgmental manner. Recognizes unique medical & psychosocial conditions relevant to LGBTQIA+ community but needs significant supervision in management. Aware of some local resources for referral	Lev	Regularly establishes sexual preference & gender identification in non-judgmental manner. Aware of common medical & psychosocial conditions that disproportionately affect LGBTQIA+ pts & effectively screens for these conditions Develops an awareness & is	Lev	Demonstrates awareness of common medical & psychosocial conditions that disproportionately affect LGBTQIA+ pts & effectively screens for these in most of appropriate instances (STI, domestic/partner violence, unhealthy substance use, behavioral health issues, etc.).	Lev ✓	Aware of common medical & psychosocial conditions that disproportionately affect LGBTQ pts & effective screens for these in 100% of appropriate instances Acts as an expert resource for accessing & utilizing referrals for complex medical & psychosocial needs of LGBTQIA+ patients such as gender
	sensitivity to LGBTQIA+ issues	√	& requires assistance in utilizing these resources. Demonstrates empathy & advocates for patients, demonstrates limited insight into how physician advocacy can translate to impacting larger culture related to LGBTQIA+ care	✓	increasingly effective in accessing resources for interdisciplinary care of LGBTQIA+ patients Often but not routinely demonstrates & models empathy Speaks out locally to peers & patients when appropriately to	✓ ✓	Routinely knowledgeable & effective with intra & interagency referrals as necessary Effectively coordinates care across these domains. Consistently demonstrates empathy, cultural awareness, &	√	affirming care, surgical needs, STI management. Acts as a local & national advocate for LGBTQIA+ persons & patients

	decrease stigma to	advocacy for	
	LGBTQIA+	LGBTQIA+ patients	

Comment:

EPA #12: Assess persons for & manage HIV Pre-Exposure Prophylaxis (PrEP)

Level 1 Lev	vel 2	Level 3	Level 4	Level 5
✓ Unable to recognize persons who qualify for PrEP. ✓ Does not explore patient preferences in HIV prevention. ✓ Fails to demonstrate shared decision making including assessing readiness to start treatment, alternatives, barriers. ✓ Provides incomplete patient instructions & follow up.	Establishes rapport & solicits sexual preference & gender identification in non-judgemental manner. Recognizes indications for & medication types for PrEP but needs significant supervision in management Aware of baseline assessment & follow up requirements but requires assistance in utilizing these resources.	 ✓ Performs risk assessment for PrEP indication including injection behaviors, sexual preference & gender identification in non-judgemental manner. ✓ Effectively engages in shared decision making regarding PrEP including exploring patient knowledge, preference, medication rationale & alternatives but may requires supervision for complex situations 	✓ Routinely performs risk assessment for PrEP indication including injection behaviors, sexual preference & gender identification in non- judgemental manner. ✓ Effectively & independently engages in shared decision making regarding PrEP including exploring patient knowledge, preference, medication rationale & alternatives. ✓ Demonstrates understanding & independently	 ✓ All level 4 behaviors & Role modeling & teaches PrEP management ✓ Engages in QI or community activities to promote PrEP uptake.

v	✓ Understands routine	explains & perform	
	& ongoing monitoring	routine & ongoing	
	but may require	monitoring for HIV	
	assistance with	risk & STI	
	intercurrent issues		
	including incident		
	STIs, medication side		
	effects.		

Action Plan

1. What do you identify as the strengths for this trainee?

2. What do you identify as areas for growth over the next six months?

3. List any specific aspects of the HIV training track that the trainee should be working on enhancing & improving: