



Discipline of Family Medicine

Preceptor User Manual

Ensure all sections are read as is for Preceptors and not residents!

For

ePortfolio System

Version 1.0

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Revision History

Name	Date	Reason For Changes	Version

1 General Information

1.1 System Overview

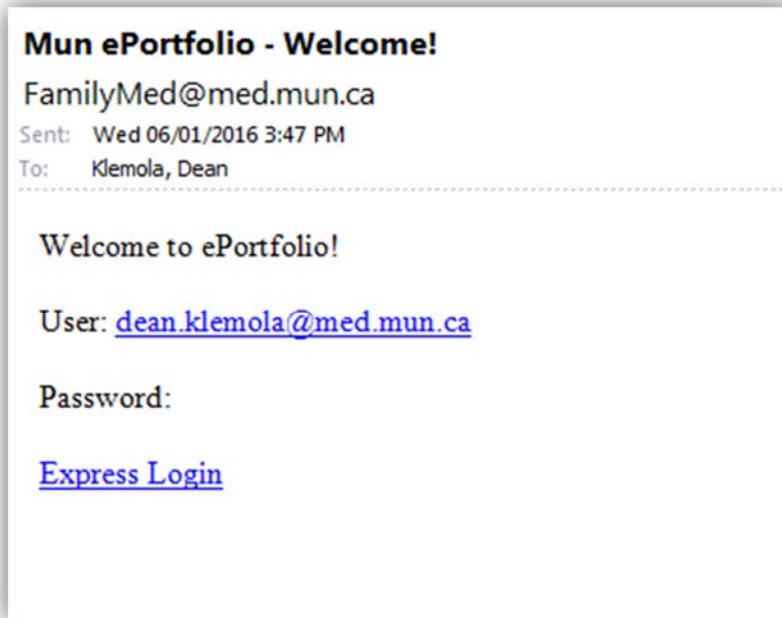
The ePortfolio system is a tool designed to aid in the evaluation of residents through the input and analysis of their field notes and other assessment tools. A field note is a report on a discussion, direct observation, observed examination, observed procedure, or some other clinical encounter.

The purpose of field notes is to document the progress of residents as they acquire the required competencies to complete their training. Without this documentation residents cannot progress in the program, and will miss opportunities to address gaps or areas of weakness and we will not be able to highlight areas of exceptional work.

2 Getting Started

2.1 First Access

For your first access to the site you will have received an email containing your and an express login link. The express login link, upon being clicked will automatically log you in and bring you to the homepage. If you did not receive a welcome email, your account has not been setup yet and you will need to contact an existing admin such as Susan Carter to be setup.



2.2 The Preceptor Role

Each resident has a faculty advisor. In some cases the role of Preceptor is merged with that of Advisor, but all residents should have the option of having an advisor who is not directly responsible for assessing that resident.

The role of the faculty advisor is to:

- a) Orient the resident to the discipline of family medicine
- b) Discuss with the resident the program objectives and the resident's own learning objectives, and design an appropriate educational plan
- c) Review this plan regularly and assist the resident in finding the resources within the program necessary to meet his or her unique learning needs
- d) Help the resident to:
 - Reflect on program choices to be made
 - Understand assessment feedback
 - Set and revise learning
- e) Review field notes and the residents overall progress and advise learning plans to address areas of weakness.
- f) Provide information to the assessment committee.

2.2.1 Field Notes

You should use field notes to provide qualitative comments on the performance of residents during daily clinical practice. Residents are required to generate a sufficient number of field notes to provide and document a meaningful, formative assessment and to allow for feedback. Our current program goal is one field note per half day in clinic.

Comments on clinical supervision or other activities should be case specific; focus on the one, most significant aspect of the case; lead to reflection and feedback; and provide recommendations for future similar cases (change or no change). This “daily” feedback should not make final judgments on overall competence, readiness to practice, or readiness to progress; rather, it is meant to contribute on a more micro level to summative assessments.

2.2.2 Field Note Completion

In order to complete a field note, you’ll need to first login to ePortfolio, the simplest method is locating the welcome email and clicking the Express Login link contained. As an alternative, you can log on by going to field notes on the menu of the R side of the DFM PG program website. This link can be dragged on to your computer and a shortcut icon created. Once on your desktop all you have to do is click the icon. If you request that your username and password be saved, you should have easy access in the future. Once logged in, navigate to *Field Note* -> *Field Note Entry Form*. You’ll be greeted by a page with a dropdown list of potential rotations. If the list is empty, you are not currently setup on any rotations in the ePortfolio system, if this is in error please contact scarter@mun.ca to get setup.

Once you select a rotation, the Field Note form becomes available to you. Make your selection for discipline, age range, patient gender, encounter date, note based on, Skill Dimension, CFPC Priority Topic, CanMEDS-FM Role, competency, and follow up. As well as filling in answers for reason for visit, procedure (when applicable), what was done well, what could be done differently, strategies for improvement and comments. After all this is done, and you’ve reviewed your form click the submit button at the bottom of the page and you’re done.

If you receive any messages other than success at this point it is because fields that are required were not complete. Complete the missing fields and try to submit again.

2.2.3 Field Note Sign Off

In order to complete a competency statement for a field note done by a resident (always required) you can follow these instructions. You may be asked as a faculty advisor to sign off. If unsure, click the acknowledged competency statement.

1. Login to ePortfolio
2. On your homepage you will see a list of field notes requiring your competency statement, click on one to get started.

The screenshot shows the top navigation bar of the Memorial University Faculty of Medicine website. On the left is the Memorial University logo. On the right, there are links for 'my.mun / Memorial@Home / Self Service', 'Libraries', and 'Donate'. A search bar contains the text 'Search MUN pages'. Below this is a teal banner with 'Faculty of Medicine' on the left and 'Building a Healthy Tomorrow™' on the right. A navigation menu includes 'Home', 'Field Note', 'Notifications', 'Files', 'Resident Overview', and 'Help'. On the far right of the menu is a link for 'Dean Facult - Logout'.

Residents are expected to obtain one field note per half-day clinic during rotations. Field notes can be initiated by the resident or by the preceptor. The Field Note is a tool to drive feedback (both positive and negative) and to drive future learning. Residents must complete a minimum of 100 field notes per academic year.

Notifications

(11) New Notifications

Test

Resident, Resident - 161 days, 21 hours ago

Triple Test

Resident, Resident - 162 days, 24 hours ago

Double Test

Quick File Access

[canada_newfoundland.gif](#)

Newfoundland Flag

5/14/2015 3:46:48 PM

Field Notes (New)

The following field notes require follow-up:

Resident, Dean (Airport Heights Medicine Clinic, St. John's, NL) - 2015-08-13 14:22:12
Resident, Dean (Airport Heights Medicine Clinic, St. John's, NL) - 2015-08-14 12:45:11
Resident, Dean (Cabot Square Medical Clinic, St. John's, NL) - 2015-09-24 15:02:09
Resident, Dean (Cabot Square Medical Clinic, St. John's, NL) - 2015-09-24 15:03:38

The following field notes require a competency statement:

Resident, Dean (Airport Heights Medicine Clinic, St. John's, NL) - 2015-06-18 09:34:39
Resident, Dean (Airport Heights Medicine Clinic, St. John's, NL) - 2015-06-18 14:28:40
Resident, Dean (Airport Heights Medicine Clinic, St. John's, NL) - 2015-06-24 14:27:39
Resident, Dean (Airport Heights Medicine Clinic, St. John's, NL) - 2015-06-25 10:59:20
Resident, Dean (Airport Heights Medicine Clinic, St. John's, NL) - 2015-06-25 11:06:37
Resident, Dean (Airport Heights Medicine Clinic, St. John's, NL) - 2015-06-29 15:13:54
Resident, Dean (Airport Heights Medicine Clinic, St. John's, NL) - 2015-07-08 09:04:21
Resident, Dean (Airport Heights Medicine Clinic, St. John's, NL) - 2015-08-13 16:15:38
Resident, Dean (Airport Heights Medicine Clinic, St. John's, NL) - 2015-08-14 12:17:38
Resident, Dean (Airport Heights Medicine Clinic, St. John's, NL) - 2015-08-14 12:45:11
Resident, Dean (Cabot Square Medical Clinic, St. John's, NL) - 2015-09-16 10:24:30
Resident, Dean (Cabot Square Medical Clinic, St. John's, NL) - 2015-09-16 11:04:30

3. This will bring you to the competency page, to fill it out 3 clicks are required.
- First click “update competency statement” seen below; this will navigate you to the competency section of the page.



Update competency statement

Academic Rotation

Academic Rotation: Resident, Dean (Airport Heights Medicine Clinic) - 2015-04-01 -> 2015-04-15
Location: Airport Heights Medicine Clinic, St. John's, NL
Rotation: Academic Family Medicine
Preceptor: Facult, Dean

Resident: Resident, Dean
Program Year: 2014

Encounter Details

- Second, select a competency.

Professional

Competency

Progressing as expected Some concerns with progress Significant concerns with progress

Review

Follow-Up?: Yes No

Reviewed By:

Update Field Note

- And finally click “update field note”

Professional

Competency

Progressing as expected Some concerns with progress Significant concerns with progress

Review

Follow-Up?: Yes No

Reviewed By:

Update Field Note

And the competency statement has been updated.

2.2.4 Notifications

The notifications section of the site lets you know when there is something that requires your attention. This includes field notes that require a follow up, new responses to comments, new field notes submit by the resident, along with other items that require your attention within the system.

2.2.5 Files

The files section of the site is for your personal use, the files can be accessed from wherever the site is available. Additionally, preceptors and admins have the ability to request documents from residents if required.

3 The Homepage (Dashboard)

The page you are greeted with when you login contains all sort of useful information. We will go over each of them now.

The header is a quick look at your progress. For a preceptor, there is currently not much feedback on this panel.

Residents are expected to obtain one field note per half-day clinic during rotations. Field notes can be initiated by the resident or by the preceptor. The Field Note is a tool to drive feedback (both positive and negative) and to drive future learning. Residents must complete a minimum of 100 field notes per academic year.

Current progress: 51/100



The notification section advises you of any important messages that you have not read yet. Additionally, the newest 10 comments that you did not author will scroll below (temporarily suspended). Clicking on any of these comments sends you to the specific field note it was written for.

The quick file access section is simply available for convenience. Any files you have stored in the ePortfolio system are available through the quick file access interface.



Quick File Access			
ePortfolioDataStructure.jpg	Data Structure	408 kb	1/11/2016 10:17:54 AM

The field note section is probably the most frequented of the homepage items. Through this section you can quick start a new field note, or you can review one that requires your attention. **Whenever a resident creates a field note with you selected as the faculty, a competency statement is required from you.** Additionally any field notes that require a follow up will also be indicated on this section.



The following field notes require follow-up:

- Resident, Dean (Health Science Centre, St. John's, NL) - 2015-05-29 16:31:31
- Resident, Dean (Health Science Centre, St. John's, NL) - 2015-06-18 09:23:22

The following field notes require a competency statement:

- Resident, Dean (Health Science Centre, St. John's, NL) - 2015-11-18 14:48:05
- Resident, Dean (Health Science Centre, St. John's, NL) - 2015-11-20 10:14:39
- Resident, Dean (Health Science Centre, St. John's, NL) - 2015-12-21 13:49:53
- Resident, Dean (Health Science Centre, St. John's, NL) - 2016-01-05 11:42:42
- Resident, Dean (Health Science Centre, St. John's, NL) - 2016-01-05 14:37:28

4 Field Note

4.1 Entry Form

The field note entry form is fairly self-explanatory. The most common issue arising on this page is there being a lack of rotations to select. This is the case when a user is not on rotation. Should you find you are missing a resident or preceptor, it's important you contact an administrator so that they can get the user added for you, if you cannot see them, they will not be able to see you.

4.2 Drafts

Field note drafts are saved every 5 minutes during the completion of a field note, if a field note is submitted any draft saved while it was in progress are removed. This is in place to make sure field notes that are started, but not complete, are not totally lost should something come up during completion that prevents the submission of the field note. Once the draft is submitted it is deleted.

Note: Drafts only exist for 30 days, after which, all reference to them is gone and not recoverable!

4.3 Review

The review field note interface can be used to review any field note that is associated with your account. From this interface you can review all aspects of a field note as well as any comments that have been written by or for you.

4.4 Modify

On occasion you might have to make a change to some of the details of an encounter. The modify field note page is where this is done. The competency statements are also updated from this page.

5 Resident Overview

5.1 Resident Details

The resident details table contains general information about the selected resident. Also included in the table is a link to review resident comments.

Resident, Dean

Resident Details	
First Name	Dean
Last Name	Resident
Program Year Start	2014
Program Year End	9999
Field Notes to date	38
Comments	Review Resident Comments

Resident, Dean (Health Science Centre) - 2015-03-01 -> 2015-03-31

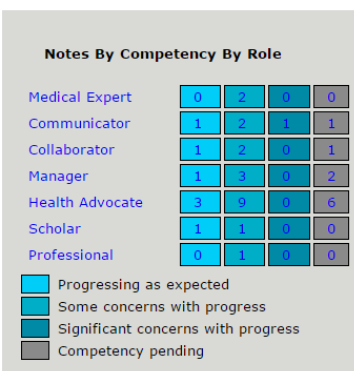
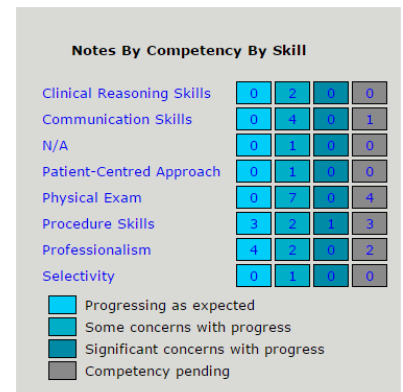
Academic Rotation Details	
Discipline	Academic Family Medicine
Start Date	3/1/2015
End Date	3/31/2015
Field Note Count	1
Field Notes Per Day	0.03
Comment Count	
Comments Per Day	

5.2 Academic Rotation Details

The academic rotation details table contains specific information about the selected academic rotation. Changing the selected academic rotation also applies a filter to the notes by competency by skill and notes by competency by role tables as well.

5.3 Notes By Competency By Skill Dimension

The notes by competency by skill table are a breakdown of the distribution of field notes across different skills dimensions grouped by competency statement. Clicking on any of the numbers in the graph will bring you to the corresponding field notes.

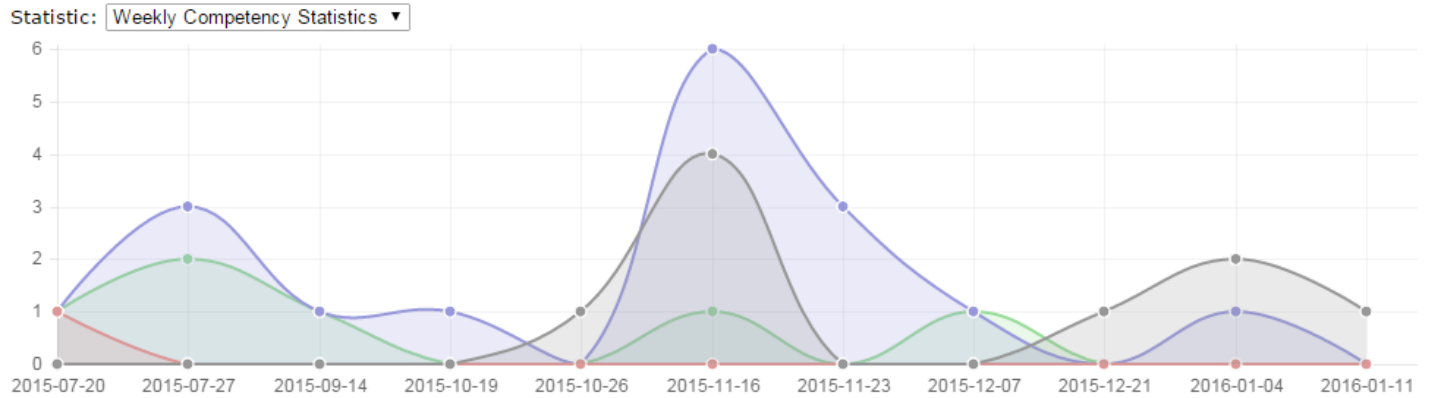


5.4 Notes By Competency By CanMEDS-FM Role

The notes by competency by role table are a breakdown of the distribution of field notes across different CanMEDS-FM roles grouped by competency statement. Clicking on any of the numbers in the graph will bring you to the corresponding field notes.

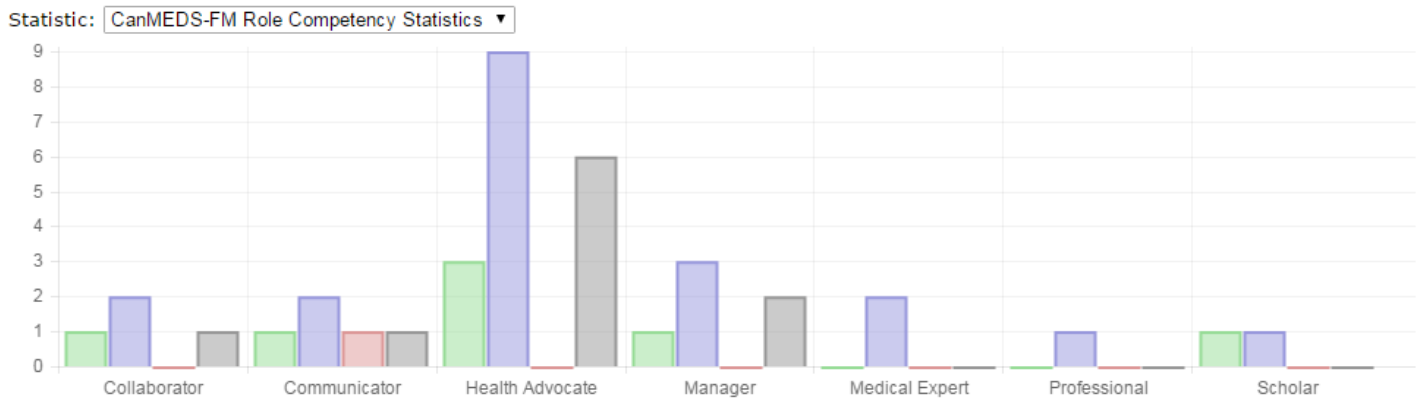
5.5 Statistics Graph 1

The first graph is a breakdown of field notes by competency by date. The options are currently by week or by day.



5.6 Statistics Graph 2

The second graph contains the same data as notes by competency by skill dimension, and notes by competency by role. The difference being this graph is not affected by the academic rotation filter.



6 Files

6.1 Files

The ePortfolio site also has a section devoted to storing files. With the multi-site nature of being a resident keeping all your files in order might be a challenge. This is why we have added a file store in the system, to help manage your electronic documents.

6.2 Requested Files

From time to time a preceptor or admin might require a file or form complete. The requested files are all the files that have been requested to date.

7 Help

7.1 Contact

The contact form is in place to facilitate communication between administrators of the site, and users. Use this page to convey messages of a less than urgent nature. Urgent issues should be communicated by phone, or by email.

7.2 Request User

On occasion access will be required for unforeseen persons. The request user page is in place to meet that need. When a new user needs to access the site to create a field note the account can be requested from this page, by an existing user.