

Writing Field Notes & Reviewing Assessments in Elentra

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Outline

- Writing a Field Note in Elentra – slides 3-15
- Reviewing Completed Assessments in Elentra – slides 16-19
- Reviewing Field Notes In Elentra – slides 20-24
- Reviewing ITARs in Elentra – slides 25-26

Writing a Field Note in Elentra

/ Dashboard

Elentra Message Center

The Message Center is currently empty.

 Previously Read Messages

CBME Progress

My Event Calendar

Learner Dashboard

PG-FM-Kingston: Family Medicine Kingston

Click here to start
the field note!



 My Meetings

Start Assessment/Evaluation

Family Medicine Kingston ▼

Start Assessment/Evaluation

This is preset to “start assessment/evaluation”

On-Demand Workflow

Family Medicine Field Note ▼

Select “Family Medicine Field Note”

Select assessor by typing in their name. If assessor does not show up, then can request preceptor access (for preceptors with affiliation to Queen’s/core experiences) or add external assessor.

Select assessor

Tara McGregor ▼

Request Preceptor Access

Add External Assessor

Select Date of Encounter

2021-06-23



Enter date of encounter

Select program

Family Medicine Kingston ▼

Ensure “Family Medicine” your home site is selected. Only programs in which you are registered will show up.

Select assessment method

☐ Complete and confirm via PIN

The selected attending has not set their PIN.

☒ Complete and confirm via email

Complete an assessment using the selected tool. U
an email notification asking them to review/edit and

Select “complete and confirm via email” unless your preceptor requests that you do otherwise (KHSC ER preceptors sometimes use the PINs, most others do not).

Objective Sets

Browse Domains of Clinical Care ▼

Next select Domain of Clinical Care – see next slide for more details

Objective Sets

Browse Domains of Clinical Care ▼

Begin typing to search...

Filtering Items by Objective sets

- ☐ DOCC1: Maternity & Newborn Care
- ☐ DOCC2: Care of Children & Adolescents
- ☐ DOCC3: Care of Adults
- ☐ DOCC4: Care of the Elderly
- ☐ DOCC5: End of Life/Palliative Care
- ☐ DOCC6: Surgical & Procedural Skills
- ☐ DOCC7: Behavioural Medicine/Mental Health
- ☐ DOCC8: Health Equity
- ☐ DOCC9: Physicianship

Select Domain of Clinical Care (DOCC):

There are 9 DOCCs which the Queen's FM program is broken down into. These are based on stage of life (e.g., maternity & newborn care, care of children, adults etc) and specific skills/areas (e.g., surgical & procedural skills, health equity, physicianship).

Objective Sets

DOCC3: Care of Adults ▼

Browse Entrustable Professional Activities ▼

Begin typing to search...

Filtering Items by Objective sets

- ☐ EPA10: Care of the Adult with a Minor Episodic Issue
- ☐ EPA11: Care of the Adult with an Acute Serious Issue
- ☐ EPA12: Care of the Adult with a Chronic Condition
- ☐ EPA13: Care of the Adult with Multiple Medical Issues
- ☐ EPA14: Performing a Periodic Health Review of an Adult

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Select Entrustable Professional Activity (EPA):

EPA = “a unit of professional practice that constitute what clinicians do as daily work” (ten Cate, 2018)

At Queen’s FM, we have 36 different EPAs, which are divided by DOCC. You will only see the EPAs relevant to one DOCC. If none of them fit, then please select a different DOCC.

HINT: Specific procedures are listed under the EPAs associated with the Procedural & Surgical Skills DOCC, so if you are giving feedback on a procedure, please select the Procedural & Surgical Skills DOCC.

Objective Sets

DOCC3: Care of Adults ▼

EPA11: Care of the Adult with an Acute Serious Issue ▼

POE5: Investigation ▼

Assessment Tools

Begin typing to search...

Filtering Items by Objective sets

☐ POE1: Hypothesis Generation

☐ POE2: History

☐ POE3: Physical Examination

☐ POE4: Diagnosis

☒ POE5: Investigation

☐ POE6: Procedural Skills

☐ POE7: Treatment (or management)

☐ POE8: Follow-up

☐ POE9: Referral

Select Phase of Encounter (POE):

There are up to 9 phases of the clinical encounter listed for each EPA. Select the one most relevant to what you are providing feedback on.

Objective Sets

DOCC3: Care of Adults ▼

EPA11: Care of the Adult with an Acute Serious Issue ▼

POE5: Investigation ▼

Assessment Tools

Search Evaluation Tools...

Family Medicine Field Note

Smart Tag Form

0 assessments completed on this learner.

Preview This Form ▶


Begin Assessment ▶

Click on “Begin Assessment” to start
the rest of the field note



Family Medicine Field Note

 Download PDF

 Forward Task

 Delete Task

Once you have submitted this assessment, the result will appear on the target's dashboard.

Assessor



Faculty Family Medicine
Faculty • Postgraduate Medicine
test@test2.ca



Target



New FM Resident
Student • Postgraduate Medicine
test@test45.com

Task delivered on **2021-05-25**

DOCC3: Care of Adults

EPA11: Care of the Adult with an Acute Serious Issue

POE5: Investigation

Ensure you have the correct resident, date, DOCC, EPA, POE and scroll down to continue

NOTE ABOUT THE NEXT SECTIONS OF THE FIELD NOTE:

- For the rest of the field note you can enter as much or as little information as you see fit
- If your preceptor has requested you to write a field note on their behalf (e.g., they gave you feedback and asked you to document it)
 - Then you should fill out the field note including their feedback -> they will review and submit it. It won't show up in your field note collection until they approve it.
- If your preceptor gave you feedback but forgot to write a field note
 - Then you can fill out the following fields -> they will review and submit it. It won't show up in your field note collection until they approve it.
- If your preceptor did not give you specific feedback and you would like to request it in a field note
 - Then you can just start the field note and send to them empty with a request for them to complete it

Type of encounter/situation

55M chest pain

Enter a brief description of the encounter. This is meant to cue the resident regarding the encounter.

*Basis of Assessment

Direct Observation

Can select direct vs. indirect. Remember direct observation is preferred.

*Clinical Setting

Ambulatory/Office practice

Choose the relevant clinical setting from the drop down menu.

*Skill Dimensions and FM CanMEDs Role

× Clinical Reasoning Skills × Selectivity

Select as many Skills Dimensions/CanMEDS FM Roles as apply. You can select multiple at once. If you need to deselect one, you can click the "X".

*DFM Field Note Entrustment Scale



Flagged for Follow-up



Requires close supervision



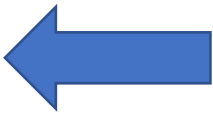
Requires minimal supervision



Ready for independence;
supervision for refinement

Select the level of entrustment that is appropriate. Behavioural descriptors will eventually be linked to the entrustment scale to make it clear what level of supervision the resident requires if there is some uncertainty (further development in Elentra required).

Words like "try", "because", "consider", "next time", "suggest", in your narrative support behaviourally specific teaching tips that promote learning



Continue (strengths)

You did a nice thorough history in this patient presenting with chest pain. Continue thinking about broad ddx to start and narrowing your differential with your history and physical exam.

Change (or do less)

Consider (next steps)

Next time, think about a stress test when there is an exertional component to the chest pain.

Comments

Write in the feedback you received from your preceptor. Remember, you can leave this blank if you are using the field note to request feedback.

*Do you have any concerns with performance of any of the intrinsic roles (e.g., communicator, collaborator, leader, health advocate, scholar, professional)

☒

No

☐

Yes

Last question: Please indicate if any concerns with any of the intrinsic roles (if not already commented on above). This is preselected to no, but if you had any concerns, there will be a mandatory comments box to add comments.

Save as Draft

or

Submit and notify assessor by email

You can save as a draft or click submit and notify assessor by email once you've completed as much or as little as these sections as appropriate.

*Do you have any concerns with performance of any of the intrinsic roles (e.g., communicator, collaborator, leader, health advocate, scholar, professional)

☐

No

☒

Yes

Comments (mandatory)

Comments (note these would be flagged to Program Director, Site Director, Assessment Director and Academic Advisor)

Assessment Cue

Assessment Cue (optional) – please do not include any patient identifiers:

Please complete FN from my ER shift yesterday |

Once you click submit this window will pop up prompting you to provide an assessment cue if desired. You can enter a cue to your preceptor and click submit assessment.

Close

Submit Assessment

Reviewing Completed Assessments

Learner Dashboard

PG-FM-Kingston: Family Medicine Kingston

Overview	Assessments 38	Assessments Items	Trends	Comments	Pins
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At the top of your dashboard, click on assessments.

NB the count indicates the number of assessments you have not reviewed.

Filter Options

Search

Select Assessor

Date Filters

☒ Date Range

 to 

☐ Rotation

Select Rotation

Scroll down and you can see all assessments.

Completed Assessments

Mark All as Read

Direct Observation of Physical Exam – Breast Exam

Rubric/Flex Form

P&P7

View Details

Click on view details to see the entire assessment.

You can easily see your overall rating on the assessment.

Aug 3, 2021



Assessed By Tara McGregor



The eye button tells you if it has been seen by yourself. It will automatically be marked as read if you click view details.

Aug 3, 2021

Direct Observation of Physical Exam – Non-Sensitive Exams

Rubric/Flex Form

P&P7

View Details

Assessed By Tara McGregor



The pin button will pin to the section on your dashboard so you can easily go back and review this assessment at a later time

Learner Dashboard

PG-FM-Kingston: Family Medicine Kingston

Family Medicine Kingston ▼

Can review your pins
from here



- Overview
- Assessments 38
- Assessments Items
- Trends
- Comments
- Pins

Filter Options

Select Assessor ▼

^

Date Filters

▼

☒ Date Range

📅

to

📅

☐ Rotation

Select Rotation ▼

You can give feedback to your preceptor if a field note or other assessment was particularly helpful by giving a “thumbs up”



Jul 6, 2021



Family Medicine Field Note

Smart Tag Form

DOCC6

EPA24

PTYPE4

P29

POE6

SD/FMR5

SD/FMR3

SD/FMR2

[View Details](#)

Assessed By Tara McGregor



reinforced what I did well



Write your comments as to why it was helpful in this box then click submit

Close

Submit

Reviewing your Field Notes

- Can look at field note progress related to each EPA by click on the EPA from your dashboard

EPA10

Care of the Adult with a Minor Episodic Issue

7 Assessments

0 Archived Assessments

EPA11

Care of the Adult with an Acute Serious Issue

Current Assessments

1

Emergency Medicine, Final (Test)

N/A

1

Emergency Medicine, Interim (Test)

N/A

1

Family Medicine, Final (Test)

N/A

1

Family Medicine, Interim (Test)

N/A

13

Family Medicine Field Note

1

3

3

6

Archived Assessments

17 Assessments

0 Archived Assessments

Can view ITARs and field notes that related to each EPA on your dashboard.

Can click on each to access the actual form.

When you click on field note, you can see a graphical display of the data (see next slide)

DFM Field Note Entrustment Scale

Overall

1 3 3 6 13 Assessments



Ready for Independence;
supervisor for refinement

Requires Minimal
Supervision

Requires Close
Supervision

Flagged for Follow-up



Assessments (Mar 1, 2021 to Jun 17, 2021)

Can also review all your Field Notes

PG-FM-Kingston: Family Medicine Kingston

Overview Assessments 33 Assessments Items Trends

From your dashboard, select "trends"

Filter Options

field note

Enter field note into search field

Select Assessor v

Date Filters

☒ Date Range

Can select date range you want to see more recent performance

Scroll to bottom and select "apply filters"

Note you will need to reset if you want to see all assessments again

Reset

Apply Filters

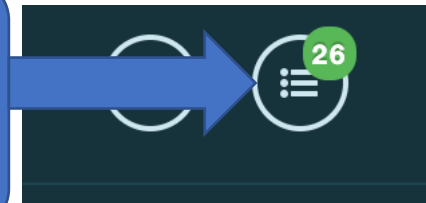
DFM Field Note Entrustment Scale



Reviewing ITARs

- Can link to ITARs through reviewing your dashboard
- Another way of reviewing all assessments is through your Assessment & Evaluation Badge

A&E Badge is in the top R hand corner



Assessment & Evaluation

Assessment Tasks

Tasks Completed on Me

Can review tasks completed on you and search for ITAR to sort

itar

Delivery Date

Delivery Start

Delivery End

Click "apply filters"

Apply Filters

Remove Filters

My Reports

TEST – DFMKTI – Emergency Medicine ITAR – Final

Rubric/Flex Form

Optional

Delivered on **Jun 22, 2021**

Encountered on **Jun 22, 2021**

Completed on **Jun 22, 2021**


Rubric/Flex Form triggered by Tara McGregor.

Target: **Jane Family Medicine**

Resident • 2021

Assessor: **Tara McGregor**

Staff • Pcoordinator

 ☐ Select and click on the **Download PDF(s)** button above to download a PDF of all selected tasks.

[View Task ▶](#)

TEST – DFMKTI – Family Medicine ITAR – QFHT – Final

Rubric/Flex Form

Optional

Delivered on **Jun 22, 2021**

Encountered on **Jun 22, 2021**

Completed on **Jun 22, 2021**


Rubric/Flex Form triggered by Tara McGregor.

Target: **Jane Family Medicine**

Resident • 2021

Assessor: **Tara McGregor**

Staff • Pcoordinator

 ☐ Select and click on the **Download PDF(s)** button above to download a PDF of all selected tasks.

[View Task ▶](#)

Click on
“view task”
to review