## Revision History

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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. A field note is a report on a discussion, direct observation, complete examination observed, complete procedure observed, or some other clinical or professional encounter focusing on a single modifiable behavior. The field does not always need to be clinically oriented. The resident or preceptor may write about an academic or alternate task (e.g. preparing a teaching session, teaching a junior learner, leadership, research, administrative tasks, communication skills etc.).

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

You will receive an email containing your user name, password and an express login link to gain initial access to the ePortfolio. 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 admin to be setup.

2.2 The Resident Role

The role of a resident is to input and review field notes.

2.2.1 Field Notes

You should use field notes to document qualitative comments on your performance during daily clinical practice. You are required to generate a sufficient number of field notes in a variety of domains/categories that will serve to stimulate discussion with your preceptor so he/she can provide meaningful, formative feedback.

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 regarding an approach for future similar situations that may include change or not. This “daily” feedback should not make final judgments on overall competence, readiness to practice, or readiness to progress; rather, collectively, field notes are 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 to gaining initial access is to locate the welcome email and click the Express Login link contained. As an alternative, you can log on by going to field notes on the menu of the right side of the DFM PG program website. **This link can be dragged on to your computer’s desktop and a shortcut icon created.** Once this link is on your desktop, all you have to do is click the icon to gain future access. 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 an 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, and indicate what the field note is based on: Skill Dimension, CFPC Priority Topic, CanMEDS-FM Role, competency, and follow up. Additionally, you will need to fill in responses for the reason for the patient visit (if applicable), procedure (if 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 “The field note has been submitted” at this point it is because required fields within the form were not completed. Complete the missing fields and try to submit again.

Once your field note is submitted, it will be archived and readily reviewed should you, your preceptor or Faculty Advisor wish to do so. Each individual field note will be collated and graphically represented by Skill Dimension and CanMEDS-FM role with the corresponding competency statement set by one’s preceptor. Of note, you as a resident cannot assign yourself a competency statement. Before a field note is considered complete, it must be signed off by the preceptor you identify on any given field note. This sign off involves the preceptor assigning a competency statement +/- additional comments. The preceptor will be notified via their ePortfolio account should they have a follow up task(s) pending.

2.2.3 Notifications

The notifications section of the site lets you know when there is something that requires your attention. This includes: field notes that require follow-up, responses to comments, new field notes submitted by a preceptor and any other items that require your attention within the system (e.g. notices from Discipline).

2.2.4 Progress

The progress section of the homepage provides you with information about the distribution of your field notes to date. This is useful when deciding on what specific encounter you wish to write a field note on. For example, if you have a significant number of field notes collected for the patient-centered care skill dimension, clinical reasoning and procedures, but have little or no field notes on professionalism, selectivity and communication then future field notes should focus on these specific dimensions. This progress area allows you to visualize where you have gotten some feedback and areas where you need to seek more feedback.

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. The ePortfolio system has much potential and its varied role will continually be built upon. Thus, this feature of the ePortfolio may change in relevance as one progresses through their residency program. You will be instructed by preceptors or administrators when a file is expected from you for upload.
3 The Homepage (Dashboard)

The page you are greeted with when you login contains all sort of useful information. The section below reviews each of the ascribed headings of the Homepage.

The **header** is a quick view of your progress. As residents are required to complete a minimum of 100 field notes per year of their residency program, it’s important to keep track of where you are. Please note, it is not advisable or permissible to collect the majority of your field notes at the end of your program. Field notes are meant to benefit you by serving to give feedback on specific dimensions related to your clinical management of cases or academic/administrative tasks as you progress throughout your program. In this way, you can work on challenges you might be facing and identify alternate, efficient, and safer means of managing cases and tasks; all with the goal of helping you become a competent physician.

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. 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.
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 anyone other than yourself creates a field note you are required to acknowledge the new field note and you may make additional comments. Further, any field notes that require a follow-up will also be indicated on this section.

The **progress** section is a graphical representation of what has been complete to date. This section should be used when deciding on what encounter to write a field note on. A broader distribution of field notes across as many topics as possible is desirable. It’s not necessary to review it every time you login, but it can be useful to see if there are areas that require more field notes/feedback.
4 Field Note

4.1 Entry Form

The field note entry process is fairly self-explanatory. The most common issue arising on this page is there being a lack of rotations and/or preceptors to select. If a rotation and/or preceptor are missing from the drop down list, it’s important you contact an administrator so that they can add the missing option. If you don't see the preceptor listed, they will not be able to see you within their ePortfolio system either. As such, they will not be able to draft field notes for you or review ones you generate.

4.2 Drafts

Field note drafts are saved every 5 minutes during the completion of a field note. If you are delayed in submitting a field note, it is automatically saved and you can come back to finish and submit it at a later time. Field notes in the drafts section are not kept indefinitely. Please submit it as soon as possible. Once a field note is submitted, any previous drafts that were saved while it was in progress are automatically removed. This feature is in place to ensure that in-progress/un-submitted field notes are not lost or deleted.

4.3 Review

The review field note interface can be used to review any field note completed. 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

The modify field note interface is where you could make a change to some of the details you documented in the encounter section of the field note.
5 Files

5.1 Files
The ePortfolio site also has a section devoted to storing files. Keeping track of files related to your educational program can be challenging if you are moving between various sites during your training program. The ePortfolio has added a file store in the system to help manage your electronic documents.

5.2 Requested Files
From time to time a preceptor or administrator might require you to complete a file or form. The requested files section in your ePortfolio contains all the files that have been requested to date.
6 Help

6.1 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.

6.2 Request User

On occasion access will be required for those who do not currently have ePortfolio access. When a new user needs to access the site to create a field note, the request user page is where you, an existing user, can request an account for a new user.