

DOCUMENT NAME: ASSESSMENT TIMELINES AND RESPONSIBILITIES

DESCRIPTION:

Identifies the frequency of use of assessments tools, and the accountability for completing, collating, and reviewing the documents.

ACCESS TO DOCUMENT:

- Go to Family Medicine website - http://umanitoba.ca/faculties/health_sciences/medicine/units/family_medicine/index.html
- Click on “Documents and Forms”
- Form is available under “Assessments”

AUTHORITY/RESPONSIBILITY:

- Program Assistant
- Site Medical Lead
- Site Education Director
- Primary Preceptor
- Alternate/Secondary Preceptor
- Faculty Lead
- Resident
- Postgraduate Director
- Associate Director, Enhanced Skills Program
- Assistant Director, Enhanced Skills
- Postgraduate Program Office

SCHEDULE:

UPDATE/COMPLETE	SUBMIT/PRESENT	ENTER IN VENTIS (yes/no)	COMMENTS
			Review document for description of roles and responsibilities, and assessment forms

Assessment Timelines and Responsibilities

Timeline	Resident	Primary Preceptor (PP) & Preceptors	Site Program Team	Central Program Team
Resident Orientation Period (End of June)				Orientation for new residents to the assessment framework: <ul style="list-style-type: none"> ☐ competency framework ☐ assessment methods and tools feedback ☐ expectations of Residents and Preceptors ☐ policy and role of the Resident Progress Sub-Committee
Start of Block 1	Resident completes New Resident Intake Form (PART 1) and submits to PP for review 1 week prior to meeting.		Program Assistant (PA) schedules New Resident Meeting	
	New Resident Meeting: Resident and PP identify areas of strength, areas for development and establish an educational plan for the initial segment of the resident's program, documented in New Resident Intake Form (PART 2)		Education Director (ED) reports to Resident Progress Sub-committee that New Resident Meeting completed.	
Family Medicine Time	At of minimum of twice weekly, Residents complete reflection on practice and document using Resident Field Note . Residents complete required educational activities (Courses, Online Modules, Scholarship Activities) and submit required materials to PA for Portfolio binder.	Preceptors provide feedback on daily basis. At of minimum of twice weekly, Preceptors document using Faculty Field Note or Procedural Skills Field Note or for direct observation of a complete visit Direct Observation Form	Program Assistant (PA) collects Resident Field Notes, Faculty Field Notes, Procedural Skills Field Notes, Direct Observation Forms and files in Resident Portfolio binder.	
		At mid-point (1-month), PP completes MRA . At end of rotation (2-month), PP seeks feedback from other preceptors, reviews observations in Portfolio binder and completes ITAR .		
	End of Rotation Meeting: Resident and PP meet to review the ITAR . Residents acknowledge receipt of ITAR in VENTIS and complete Rotation Evaluation and Faculty Assessment forms in VENTIS.			If failed rotation, ED advises Resident Progress Sub-committee.

Off-service rotation or Horizontal rotation		Preceptors provide feedback using End of Shift Reports . At mid-term, rotation coordinator completes MRA .		
	End of Rotation Meeting: Resident and Rotation Coordinator (or delegate) review the ITAR . Residents acknowledge receipt of ITAR in VENTIS and complete Rotation Evaluation and Faculty Assessment forms in VENTIS.		If failed rotation, ED and Postgraduate Assessment Lead, and Resident Progress Sub-Committee advised of failure.	Resident Progress Sub-Committee reviews and provides input in remediation plan.
Review of Resident Progress at 6,12,18 months	Resident reviews portfolio- Resident Field Notes, Faculty Field Notes, Procedural Skills Field Notes, Direct Observation Forms, ITARs and completes Periodic Review of Resident Progress Form (PART 1) and submits it to PP for review 1 week prior to meeting.	The PP seeks feedback from other Preceptors, reviews observations in Portfolio binder and the Periodic Review of Resident Progress Form (PART 1) In select sites for 2017-2018, the PP shall complete the EPA Tracking Tool (PART 4)	Program Assistant (PA) schedules Review of Resident Progress Meetings between Resident and PP. Program Assistant (PA) updates the Residency Program Requirements Tracking Form (PART 3) .	
	Review of Resident Progress Meeting: Resident and PP identify areas of strength, areas for development and establish an educational plan for the next segment of the resident’s program, documented in Periodic Review of Resident Progress Form (PART 2)		Site Education Director confirms progress criteria met and makes recommendation to Resident Progress Sub-Committee	Resident Progress Sub-Committee reviews Site Education Director recommendations and determines continuation in program (including promotion to R2) and documented on the Progress Committee Decision Form
Review of Resident Progress at 24 months (Transition to Practice)	Resident reviews portfolio- Resident Field Notes, Faculty Field Notes, Procedural Skills Field Notes, Direct Observation Forms, ITARs and completes Periodic Review – Transition to Practice Form (PART 1) and submits it to PP for review 1 week prior to meeting.	The PP seeks feedback from other preceptor, reviews observations in Portfolio binder and the Periodic Review – Transition to Practice Form (PART 1) In select sites for 2017-2018, the PP shall complete the EPA Tracking Form (PART 4)	Program Assistant (PA) schedules Review of Resident Progress Meetings between Resident and PP. Program Assistant (PA) updates the Residency Program Requirements Tracking Form (PART 3)	
	Review of Resident Progress Meeting: Resident and PP identify areas of strength, areas for development and establish an educational plan for their transition to practice, documented in Periodic Review – Transition to Practice Form (PART2)		Site Education Director confirms graduation criteria met and makes recommendation to Resident Progress Sub-Committee	Resident Progress Sub-Committee reviews Site Education Director recommendations and confirms successful completion of program and documents on the Resident Progress Sub-Committee Decision Form