Guidance on using Educator Notes

This document is intended to provide a reference point on when and how an educator note is recommended to be used, and to provide suggestions on how to use the educator’s comments section of learning logs most appropriately.

Educator notes

Educator notes can be written by any non-trainee who has been granted access to the trainee’s ePortfolio (generally the Educational Supervisor (ES), GP Clinical Supervisors or regional administrators; some Hospital Clinical Supervisors (CS) also have access to the ePortfolio). Regional Administrators may be clinicians with senior educational roles (such as Training Programme Directors (TPDs) or Associate Deans (ADs) or administrators like the local GPVTS / GPSTP course administrators or deanery administrators involved in the ARCP process. It is helpful if each Regional Administrator adds an explanation of their role as it can be so varied!

Educator notes are a really useful way to share information in a format which the trainee can easily access but it is not possible to link individual entries to competences. They can however be used as evidence when writing ESRs and will be reviewed by ARCP panels.

The ARCP panel can only review evidence that is within the ePortfolio to make any decision regarding the trainee’s progress in training. An Educators Note can be used to give praise, but also to highlight difficulties the trainee may be encountering, or issues like a lack of engagement in the ePortfolio.

The trainee does not automatically receive a message to notify them that an Educator note has been added to their ePortfolio. It is generally most appropriate to e-mail or message the trainee with the information and indicate that it will be copied to the Educator notes, to ensure transparency and raise trainee awareness of the information. In some situations, it might be appropriate to email the trainee to check that they are happy with a summary of a discussion, before it is copied and pasted to the educator notes. In some situations or with some trainees, it might be appropriate to advise that if the person writing the note doesn’t hear by a specified date that it will be uploaded.

It is important where possible to ensure the educators notes are contemporary to the events being described, as with all other records in medicine. It is advised that it is best to summarise events or observations clearly and objectively and then if necessary or appropriate to add a conclusion or judgement.

Educator Notes can be used for many different purposes ranging from largely administrative to much more educational. The following is intended to suggest common uses but is not an exhaustive list:

- Summary of recent short periods of sickness or other leave arrangements.
• Statements about engagement e.g. “I reviewed your e Portfolio today and found that I was unable to see any shared Learning log entries since dd mm yyyy. Please could you contact me to discuss whether there are any underlying reasons for this or share entries in the next few days?”

• Requests for entries about a particular situation to be written or shared. (e.g. “I am aware that we received a complaint made about one of your consultations last week and we discussed that day how important it is to write a LLE about this. I can’t see a shared entry about this yet. Please can you share your entry or update me with your progress on this”).

• Comments on debriefing and the amount of progress being made/levels of supervision needed etc. (e.g. “We debriefed all of your patients again today; we agreed that you needed to contact one of them to change the management immediately after our meeting and there was a significant learning about better management options suggested for a couple of others. This is only your second week seeing patients alone; we will continue to debrief on every patient you see.”)

• Praise… especially if this is based on facts. (“The senior receptionist told me today that you had been particularly helpful when one of the doctors was ill last week, picking up extra visits and queries and coming back to reception to check that they had the support they needed. This is really great Working with colleagues. Thank you!”)

• Summaries of important conversations with the trainee. E.g. “We discussed your recent AKT result. You were upset by the score which was lower than you had hoped. We discussed the situation at home, you were clear that things are going well and felt your depression had not deteriorated much though you agreed that contacting Occupational Health would be appropriate and we set this up. You plan to see your GP for a review soon.”

• Links to useful educational resources. (e.g. “I was really impressed by the evolution of your consulting style when I reviewed videos with you earlier today. I mentioned that there is a very good summary of the older consultation models but did not tell you where this was. Have a look at: The Inner Consultation by Roger Neighbour pp29-50”)

• Clarifications: There may be times when an error has been made and needs clarification. (“The Overall Clinical care Grading on the mini CEX carried out on dd mm yyyy is recorded as Below Expectations; This is an error and it should read Meets expectations.”)

Educator Notes are not individually linkable to the competences. It is encouraged that educator notes are used for documenting specific events/discussions rather than used as a journal for tutorials or documenting regular debriefs. If Educator Notes are used for regular entries, it can become difficult for trainees (and other educators) to find the golden nuggets
hidden in the detailed sequences of notes, therefore some caution is recommended to avoid this!