

Educational consultation note

Learner : _____ Training level : _____

Teacher : _____ Date : _____

Chief complaint(s)

(as identified by the learner, teachers or staff; see list in Table 1)

Data gathering

Identification/Personal situation

(problems that might impact on training)

Personal :

Familial :

Financial :

Social :

Cultural :

Professional

(motivation, career plans, etc.):

Missing data :

Past educational history

(feedback on previous rotations
If available)

Missing data :

Habits

(learning strategies, lifestyle)

Missing data :

History of the present difficulties

Validate chief complaints with the learner

Elicit characteristics of the difficulties

- **What** – What kind of difficulties is experienced?
What tends to improve the situation or get it worse?
- **When** – When did the difficulties start, and what was the evolution over time?
- **Where** – Where do the difficulties happen?
(Setting/courses/rotations)
- **Why** – Why do these difficulties occur? (Onset)
- **How much** – How severe are the difficulties?

Adopt a learner-centered approach

- **Causes** identified by the learner
- **Worries** brought by academic difficulties
- Current or expected **impact** of the problem
- **Expectations** of the learner in dealing with the problematic situation

Missing data :

Review of the educational systems

Environment	Teacher	Learner
<input type="checkbox"/> Academic setting <input type="checkbox"/> Conditions for learning <input type="checkbox"/> Patient care issues	<input type="checkbox"/> Enthusiasm <input type="checkbox"/> Interpersonal skills <input type="checkbox"/> Organisation/clarity <input type="checkbox"/> Role modeling	<input type="checkbox"/> Medical expert <input type="checkbox"/> Communicator <input type="checkbox"/> Collaborator <input type="checkbox"/> Manager <input type="checkbox"/> Health advocate <input type="checkbox"/> Scholar <input type="checkbox"/> Professional
Missing data :	Missing data :	Missing data :

Objective exam	Competency that is assessed (Many types of objective exams are suggested for each competency)						
	Family Medicine Expert	Communicator	Collaborator	Health advocate	Scholar	Manager	Professional
Clinical activities							
Indirect supervision							
Direct observation (or videotaped interview)							
Chart review							
Comments from staff or patients							
Theoric exam							
Objective structured clinical exam (OSCE) or Simulated medical interview							
Oral exam							
Critical incident							
Other activities							
Teaching (observation of the resident doing a lecture, teaching a small group of students or one-to-one teaching)							
Research (evaluation of planification/realization/presentation of the resident's research project)							
Management (analysis of the resident's participation to committees, service meetings, etc.)							
Assessment							
I Knowledge and skills							
II Attitude							
III Learner's personal problems							
IV External stressors (system/teacher)							
V Global assessment of functioning and prognosis							
Plan							
1. Resolution of any underlying cause (axes III and IV)							
2. Identification of learning needs and measurable educational objectives with the learner							
3. Implementation of educational strategies and resources over a reasonable timeline							
4. Monitoring of the educational intervention through regular feedback and evaluation							
Signatures : _____ resident _____ supervisor/preceptor							