



University of Calgary Cumming School of Medicine
Department Of Family Medicine Residency Program
Progress Review Report

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Identification Information

Resident:	Date:
Competency Coach:	
Reporting Period:	to
Start Date of Focused Learning Plan if Initiated:	

Informed Self-Assessment of Progress (iSAP)

To be completed by the Resident 1 week ahead of every Progress Review

1. Self-Reflection – Summary

Summarize and reflect on your learning experiences over the last 4-5 months (including reference to domains of clinical care; off-service and elective rotations. Please also describe highlights and any challenges you have experienced).

2. *Self-Reflection – Skill Dimensions*

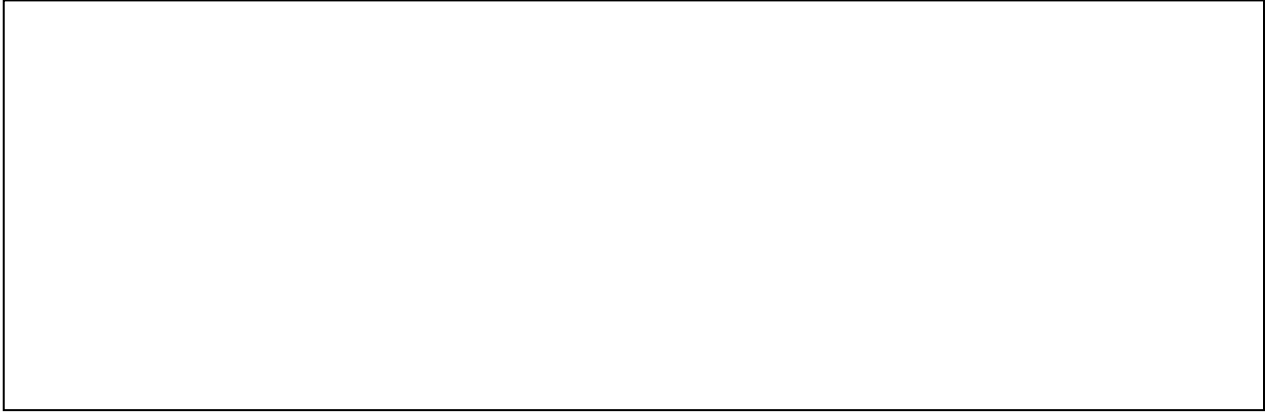
Consider the progress you have made since your last review and use specific examples of assessments you have included in your portfolio to support your self-assessed progress under each of the skill dimensions listed below. Where you also feel a change in the level of supervision is justified in relation to the Family Medicine EPA's (see section 3), please refer to the specific assessments that you feel support this under each relevant section

i) Patient centered approach

ii) Communication skills

iii) Clinical Reasoning

iv) Selectivity

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v) Professionalism

A large, empty rectangular box with a black border, intended for the assessment of professionalism.

vi) Procedures

A large, empty rectangular box with a black border, intended for the assessment of procedures.

3. Assessment elements and data over the last 4 blocks

i) Adequacy of number and **skill domains** covered by submitted field notes since last progress review meeting

Skill dimensions	Number of Field notes or DOPs forms
1 - Patient centered approach	
2 - Communication skills	
3 - Professionalism	
4 - Clinical Reasoning Skills	
5 - Selectivity	
6 - Procedures (DOPs)	

ii) Adequacy of number and **phases of clinical encounter** covered by submitted field notes since last progress review meeting

Phase of clinical encounter	Number of Field notes
A - History	
B - Physical	
C - Hypothesis	
D - Diagnosis	
E - Investigation	
F - Management and treatment	
G - Follow-up	
H - Referral	

iii) Number of field notes by **domain of clinical care** field since last progress review meeting

Domain of clinical care (DOCC)	Number of field notes
1 - Maternity Care and Care of newborn (including intra-partum care field notes)	
2 - Care of the child and adolescent	
3 - Care of the adult	
4 - Care of the elderly	
5 - Palliative Care and end of life care	
6 - Behavioural Medicine & Mental health	
7 - Care of indigenous populations	
8 - Care of vulnerable and underserved populations	

iv) Number of **other assessment** elements submitted since last progress review meeting

Assessment element	Number
ITER's	
PCSF	
Multi-Source Feedback (MSF)	
Patient Survey Questionnaire (PSQ)	
US Family Practice Board Exam results (optional) –Block 8 PGY1 and PGY2	

4. Progress and level of supervision

I believe I have progressed in levels of competence related to the following EPA's to the point where I feel a reduced level of supervision is appropriate around these EPA's (select as appropriate and indicate your proposed change of level of supervision). Please refer, in the sections above, to specific assessments in your portfolio that you feel support your proposed change in supervision level.

Levels of supervision

- Level 1 – has acquired knowledge and skills, but insufficient to perform
- Level 2 – may perform an activity under full, proactive supervision
- Level 3 – may perform an activity under qualified, reactive supervision: the resident asks for the supervision
- Level 4 – may perform an activity with “back stage” or post-hoc supervision – I.e. case discussion or chart review at the end of the day. This is threshold of competence. Once this level is reached, the activity may be safely entrusted to the resident – I.e. Independent practice

EPA	Proposed level of supervision (1=close – 4=back-stage or post-hoc)
1. Assess, manage, and follow-up patients with common presenting complaints and undifferentiated symptoms.	
2. Recognize and appropriately refer for emergent conditions.	
3. Complete an adult periodic health assessment, using evidence-based screening and risk reduction recommendations.	
4. Complete a well-child check-up, using evidence-based screening and risk reduction recommendations.	
5. Manage and follow-up patients with common chronic conditions.	
6. Care for pregnant patients throughout pregnancy.	
7. Manage postpartum mothers and their newborns in the first few weeks of life.	
8. Manage the elderly patient with multiple co-morbidities.	
9. Identify, diagnose, and manage common mental health symptoms and disorders.	
10. Care for underserved populations.	
11. Demonstrate general key features for procedural skills.	
12. Care for the palliative patient and their family.	
13. Perform low-risk, spontaneous, term, vertex vaginal delivery.	
14. Recognize when an obstetric patient requires referral for higher level care.	
15. Determine when an adult patient requires admission and inpatient hospital care.	
16. Assess and appropriately manage the adult patient in hospital.	

17. Recognize and provide appropriate management of the unstable patient in the hospital setting.	
18. Determine when an unstable patient requires referral for higher level care.	
19. Plan and coordinate discharge of adult patients from hospital.	
20. Determine when a child or adolescent requires admission and inpatient hospital care.	
21. Assess and appropriately manage the child or adolescent patient in hospital.	
22. Recognize and provide appropriate management of the unstable pediatric patient in the hospital setting.	
23. Determine when an unstable child or adolescent patient requires transfer to a higher level of care.	
24. Plan and coordinate discharge of the child or adolescent from hospital.	
25. Recognize and provide appropriate management of common pediatric emergencies.	
26. Recognize and provide appropriate management of common adult emergencies.	

5. Program Requirements

Please indicate the status of the following program requirements

Element	Status
1. Satisfactory completion of the R1 Quality Improvement Requirements (Both Programs)	
2. Presentation of R1 PICO (Calgary Program only)	
3. Successful Completion of the R2 Scholarship requirements (Both Programs)	
4. Presentation of R2 PICO (Calgary Program only)	
5. ACLS (Both Programs)	
6. BLS (Both Programs)	
7. ALARM (Both Programs)	
8. NRP (Both Programs)	
9. Alberta Opioid Treatment Virtual Training Course (Calgary Program only)	
10. ATLS (Both Programs)	
11. PALS (Rural Program only)	
12. ACORN (Rural Program only)	

6. Career Goals

Please describe your current goals for practice following completion of training

7. Personal Learning Plan (PLP)

Ahead of the upcoming Progress Review meeting, please identify a maximum of 3 areas related to your learning that you wish to work on over the next 4 months

FIRST priority

CHANGE	EPA See section 4	Skill Dimension See section 3.i	TIMELINE (1)	RESOURCES REQUIRED	CHALLENGES	IDENTIFIABLE RESULTS	Motivation
Describe specific, observable changes that you intend to make Specifically identify what <i>you</i> will do.	EPA 1-26	1-6	When will you begin?	Identify the resources you will draw upon to make the change. Whom else will you involve in the work? What resources will you need? What learning will you undertake?	What will get in the way of you accomplishing change? How challenging is the work required?	How will you know the results have been attained?	How motivated are you to do the work?
							<input type="checkbox"/> Not at all <input type="checkbox"/> Slightly <input type="checkbox"/> Moderately <input type="checkbox"/> Extremely
			TIMELINE (2) When do you think you will see results				Confident How confident are you that you can do the work?
							<input type="checkbox"/> Not at all <input type="checkbox"/> Slightly <input type="checkbox"/> Moderately <input type="checkbox"/> Extremely

Competency Coach Feedback:

SECOND priority

CHANGE	EPA See section 4	Skill Dimension See section 3.i	TIMELINE (1)	RESOURCES REQUIRED	CHALLENGES	IDENTIFIABLE RESULTS	Motivation
Describe specific, observable changes that you intend to make. Specifically identify what <i>you</i> will do.	EPA 1-26	1-6	When will you begin?	Identify the resources you will draw upon to make the change. Whom else will you involve in the work? What resources will you need? What learning will you undertake?	What will get in the way of you accomplishing change? How challenging is the work required?	How will you know the results have been attained?	How motivated are you to do the work?
							<input type="checkbox"/> Not at all <input type="checkbox"/> Slightly <input type="checkbox"/> Moderately <input type="checkbox"/> Extremely
			TIMELINE (2)				Confident
			When do you think you will see results				How confident are you that you can do the work? <input type="checkbox"/> Not at all <input type="checkbox"/> Slightly <input type="checkbox"/> Moderately <input type="checkbox"/> Extremely

Competency Coach Feedback:

THIRD priority

CHANGE	EPA See section 4	Skill Dimension See section 3.i	TIMELINE (1)	RESOURCES REQUIRED	CHALLENGES	IDENTIFIABLE RESULTS	Motivation
Describe specific, observable changes that you intend to make. Specifically identify what <i>you</i> will do.	EPA 1-26	1-6	When will you begin?	Identify the resources you will draw upon to make the change. Whom else will you involve in the work? What resources will you need? What learning will you undertake?	What will get in the way of you accomplishing change? How challenging is the work required?	How will you know the results have been attained?	How motivated are you to do the work?
							<input type="checkbox"/> Not at all <input type="checkbox"/> Slightly <input type="checkbox"/> Moderately <input type="checkbox"/> Extremely
			TIMELINE (2)				Confident
			When do you think you will see results				How confident are you that you can do the work? <input type="checkbox"/> Not at all <input type="checkbox"/> Slightly <input type="checkbox"/> Moderately <input type="checkbox"/> Extremely

Competency Coach Feedback:

8. Resident wellness

If you would like to opt out of completing the wellness section please check the box below:

Opt out

Additional wellness resources

- Program Director
- Division/Site Director
- Division/Site Coordinator
- Ombudsman - <https://calgaryfamilymedicine.ca/residency/index.php/current-residents/support-wellbeing?id=290>
- DFM Wellness Website - <https://calgaryfamilymedicine.ca/residency/index.php/current-residents/support-wellbeing>
- Physician and Family Support Program (PSFP) - <https://www.albertadoctors.org/services/pfsp>
- Professional Association of Resident Physicians of Alberta (PARA) - <https://para-ab.ca/>
- AHS Employee & Family Assistance Program (AFAP) - <https://insite.albertahealthservices.ca/hr/Page964.aspx>

i. How would you describe your wellness?

Resident signature: _____

Date: _____

Progress Review

1. Assessment Notes

Notes on samples of assessments submitted and reviewed by you – relate your comments and questions to specific assessment data in the portfolio. If the Resident is on a Focused Learning Plan (FLP), ensure you also review the assessment elements looking for evidence that the Resident has met the listed learning objectives.

**Please write legibly.

Assessment element	Comments/Questions for meeting
General comments including specific questions for meeting	
Patient-centered approach (Field notes; ITER's, PSQ, PCSFs)	
Communication skills (Field notes; ITER's; PSQ; MSF, PCSFs)	

Assessment element	Comments/Questions for meeting
Professionalism (Field notes; ITER's; MSF)	
Clinical reasoning (Field notes; ITER's; MSF)	
Selectivity (Field notes; ITER's)	
Procedural skills (DOPs forms; ITER's, IPFNs)	

2. Notes on review of informed self-assessment of progress (iSAP) form.

Based on review of this Resident's portfolio, do you feel they are accurate in their informed self-assessment in terms of learning and progress since the last progress review? Do you feel the Personal Learning Plan proposed above is appropriate and in line with your own assessment of areas requiring change over the next 4 months?

Comment on any areas of concern or divergence that you have identified and wish to explore with the Resident at the time of the meeting.

3. Issues/concerns (raised by Resident):

4. EPA Grid

Complete the EPA grid (below) based on your review of the portfolio, your own observations of the Resident, and your discussion with the Resident today. (See “[Help with deciding on EPA level](#)”)

Expected level of supervision	<i>Compare for this Resident</i>
--------------------------------------	----------------------------------

		Calgary End of 5 Bks (R1)	Rural End of 4 Bks (R1)	Calgary End of 9 Bks (R1)	Rural End of 8 Bks (R1)	Calgary End of 13 Bks (R1)	Rural End of 12 Bks (R1)	Calgary End of 17 Bks (R2 BK 1-4)	Rural End of 17 Bks (Bk 13 of R1, R2 1-4)	Calgary & Rural End of 21 Bks (R2 5-8)	Calgary & Rural End of 26 Bks (R2 Bks 9-13)
1	Assess, manage, and follow-up patients with common presenting complaints and undifferentiated symptoms.	2		2		3		3		4	4
2	Recognize and appropriately refer for emergent conditions.	2		2		3		3		4	4
3	Complete an adult periodic health assessment, using evidence-based screening and risk reduction recommendations.	2		3		4		4		4	4
4	Complete a well-child check-up, using evidence-based screening and risk reduction recommendations.	2		3		4		4		4	4
5	Manage and follow-up patients with common chronic conditions.	2		2		3		3		4	4
6	Care for pregnant patients throughout pregnancy.	2		2		3		3		4	4
7	Manage postpartum mothers and their newborns in the first few weeks of life.	2		2		3		3		4	4

		Calgary End of 5 Bks (R1)	Rural End of 4 Bks (R1)	Calgary End of 9 Bks (R1)	Rural End of 8 Bks (R1)	Calgary End of 13 Bks (R1)	Rural End of 12 Bks (R1)	Calgary End of 17 Bks (R2 BK 1-4)	Rural End of 17 Bks (Bk 13 of R1, R2 1-4)	Calgary & Rural End of 21 Bks (R2 5-8)	Calgary & Rural End of 26 Bks (R2 Bks 9-13)
8	Manage the elderly patient with multiple co-morbidities.	2		2		3		3		4	4
9	Identify diagnose and manage common mental health symptoms and disorders.	2		2		3		3		4	4
10	Care for underserved populations .	2		2		2 3 *		3		3 4 *	4
11	Demonstrate general key features for procedural skills	2		3		3		4		4	4

* = Rural Program

5. Recommendation

Based on review of the elements submitted in the learning portfolio, including the Resident’s Focused Learning Plan (where appropriate), the Resident’s self-assessment, my own observations, and today’s discussion, I recommend that the Resident:

Check (✓) Category	Decision re satisfactory progress;
	<p>Is on track. (Agree on Personal Learning Plan as above)</p>
	<p>Has some identified areas where focused attention is needed. Write a Focused Learning Plan (FLP) with Resident using template, either at meeting or within one week (if the Resident has already been on a FLP, this requires the writing of a new FLP).</p>
	<p>Requires referral to the Resident Progress Sub-Committee (RPS) for review due to identified areas of significant concern around performance (summarize areas of concern below).</p>

- i. Summarize areas of strength and priorities agreed upon above for Personal Learning Plan.

RESIDENT: I agree / disagree with the recommendations made.
If you disagree, please provide reasons:

Comments/questions

Resident signature: _____ Date: _____
Competency Coach signature: _____ Date: _____
Division/Site Director signature: _____ Date: _____

Please submit this report, as well as the top copies of the Field Notes, AS SOON AS COMPLETED to your Program Coordinator:

Northwest	Sonia Beniwal	Sheldon Chumir
Northeast	Christine Serpico	Sunridge
South	Tannis Dorscht	South Health Campus
Lethbridge	Melissa Hoppe	
Medicine Hat	Cassy Sinclair	