How to Use:
NOTE TO FILE[1]

What is the purpose of this form?

- The *Note to File* form is to be used to document specific, notable elements of resident behaviour/performance. This form is primarily text-based.
- You can use the Note to File to document something positive or negative.
- Sometimes these forms arise when there is an email or corridor conversation that merits follow up.
- This may include documentation of advocacy, scholarship, and mentorship commendations, for example, or concerns that fall outside "professional behaviour" monitoring.

If the event/behaviour in question merits an incident report or is specifically related to professionalism, you may decide to fill out a *Professional Behavioural Monitoring Form* instead (see primer on the *Professional Behavioural Monitoring Form*, here).

Who initiates this form?

The *Note to File* is typically faculty-initiated.

Who has access to the completed form?

The *Note to File* Form is an "**Embargoed Assessment**" which means that, once completed, it is withheld from the resident's view in Elentra and an email is immediately sent to the Program Director and Program Administrator to inform them that a Note to File form was submitted. As such, they can be reviewed and acted upon or set aside while more information is gathered. The forms are only viewable by the Program Director and Administrator and can be released to the Competence Committee and/or resident at the discretion of the Program Director.

## Can the forms be edited once submitted?

Assessment forms cannot be edited once submitted. However, a new form can be submitted and the old one deleted if need be.

How do I access and complete this form?

1. First, go to the Elentra website: https://meded.utoronto.ca/medicine/

2. Log in to Elentra using your UTORid and password.
   a. If you do not know / have forgotten your:
      i. UTORid: please contact your Business Officer to request this information
      ii. password: provide your Business Officer with an alternative non-UofT email or a phone number that is able to receive texts (SMS) in order for your password to be reset

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3. Select Start Assessment to the top left corner of your screen (if you're using a mobile device, it will appear as a big red button).

4. Change the On-Demand Workflow to Other Assessment Form to access the Note to File Form.
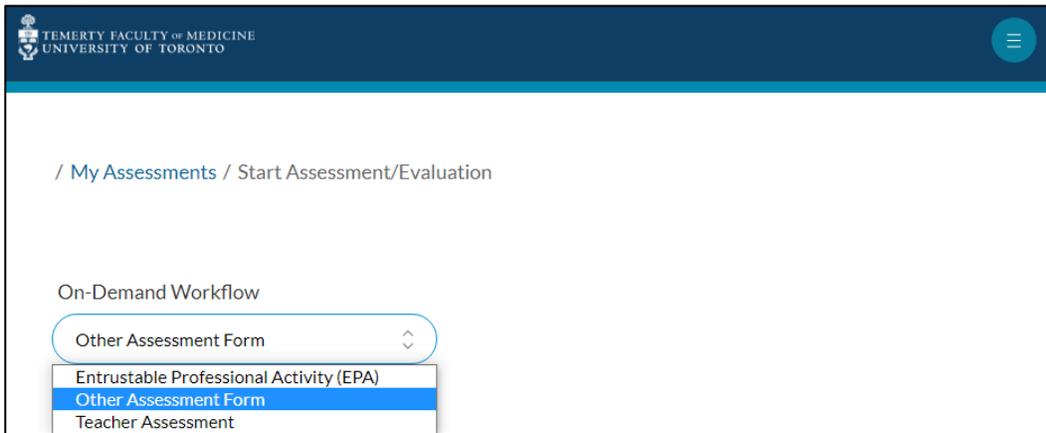
5. The Note to File Form and Note to File forms will appear once the learner and assessor are selected, as shown below.
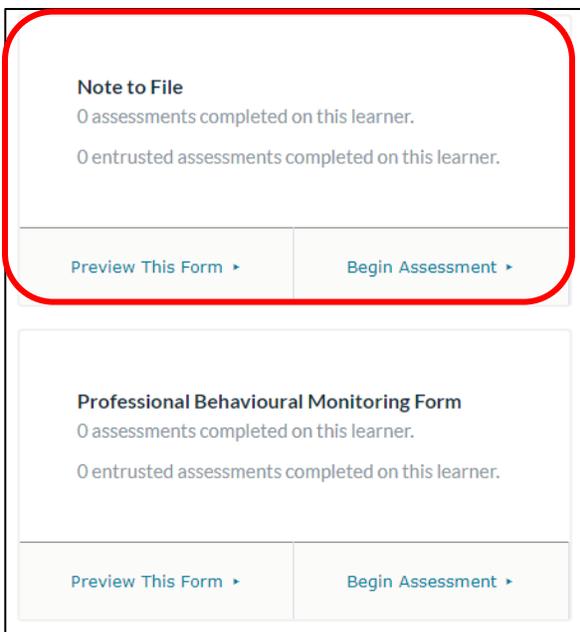
6. To view the contents of the form without initiating a data record, select Preview This Form. Otherwise, you can select Begin Assessment.

7. A preview of this tool and its contents can be found here.