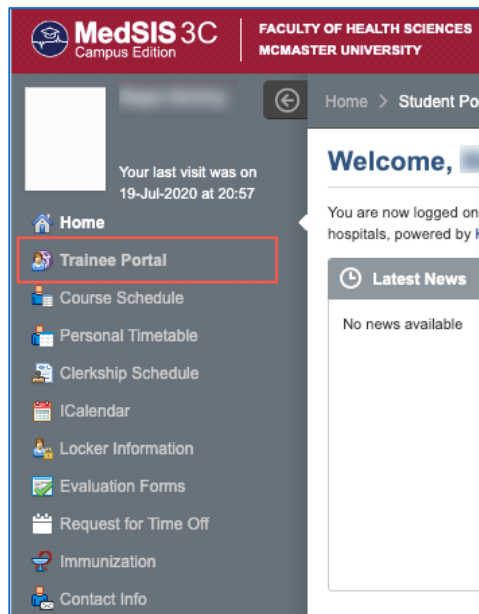


HOW TO TRIGGER A FM FIELD NOTE ON MY DESKTOP COMPUTER

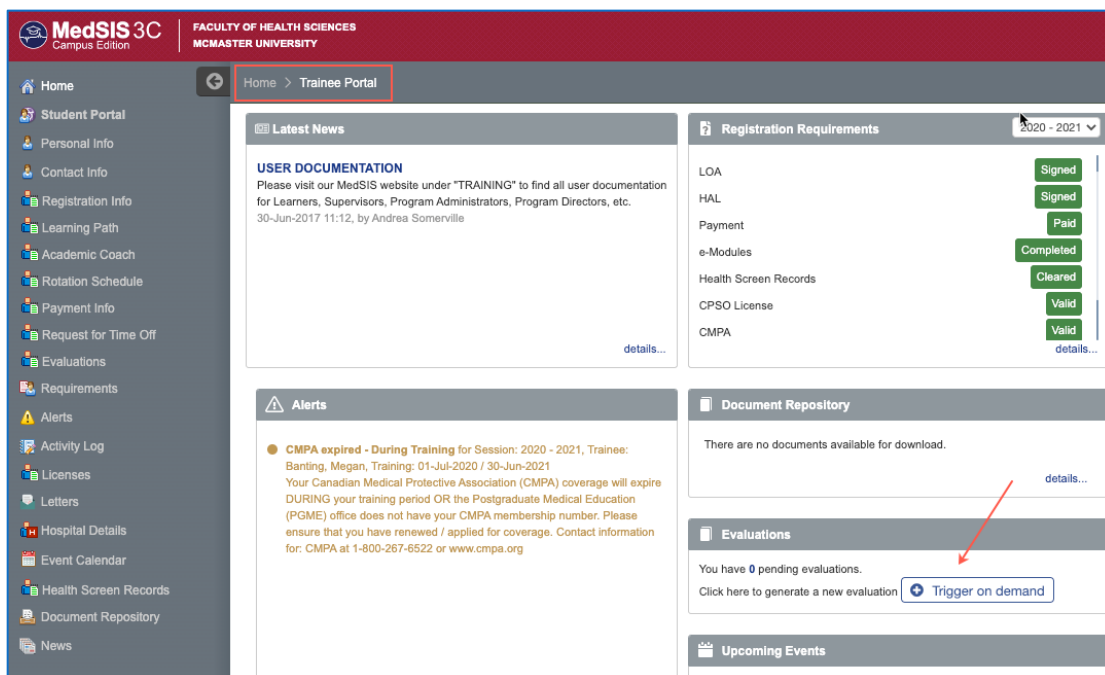
TARGET AUDIENCE: TRAINEES

Updated July 22, 2020

- Once you have logged into MedSIS, ensure you are in your Trainee Portal as some users may have multiple portals.



- From the Trainee Portal Home Screen, click Trigger On Demand.



- Select the Evaluation Type 'Field Note Evaluation'. The fields highlighted in purple are the ones you are expected to fill in. The others will pre-populate.

The screenshot shows the 'Evaluations' form with the following fields:

- Evaluation Type: Field Note Evaluation
- Trainee(Evaluatee): [Redacted]
- Learning Path: Family Medicine - FM 1.0 (01-JUL-20)
- Activity: --Select--
- Item: --Select--
- Eval Form: Family Medicine Field Note
- Supervisor(Evaluator): --Select--

Buttons: Send, Cancel

- Under the field 'Item' you will choose the Domain of Care and the EPA you will be assessing. If you select the wrong EPA or Domain of Care you can click on 'Domains of Care' highlighted in purple to go back and make a new selection.

The screenshot shows the 'Evaluations' form with the 'Item' dropdown menu open. The menu contains a search bar, a 'CLEAR SELECTION' button, and a list of options:

- Root > Domains of Care > Maternal and Newborn Care
- Common pregnancy-related concerns and conditions
- Low-risk SVD
- Post-partum and newborn care
- Routine prenatal care

A red arrow points to the 'Routine prenatal care' option. The 'Supervisor(Evaluator)' field is highlighted in purple.

- Select the Supervisor completing the field note. If the supervisor does not exist in MedSIS, click Add New Supervisor. The name and email of the supervisor are required to continue. Once you select a supervisor once, they will be pinned to the top of your supervisor list for convenience.

The screenshot shows the 'Evaluations' form with the following fields selected: Evaluation Type: Field Note Evaluation; Trainee(Evaluatee)*: [redacted]; Learning Path*: Family Medicine - FM 1.0 (01-JUL-20); Activity*: --Select--; Item*: Routine prenatal care; Eval Form*: Family Medicine Field Note; Supervisor(Evaluator)*: --Select--. A dropdown menu is open for the Supervisor field, showing a search bar and three options: Kinzie, Sarah C (CPSO#: 71458, Family Medicine, kinzies@mcmaster.ca), Shiplo, Samantha (CPSO#: 119261, samantha.shiplo@medportal.ca), and Aaron, Shawn (CPSO#: 62311, saaron@toh.ca). A '+ Add Supervisor' button is at the bottom of the dropdown. A 'Cancel' button is visible on the right side of the dropdown menu.

6. Once all the fields have been selected, click Send.

The screenshot shows the 'Evaluations' form with the Supervisor field now set to 'Kinzie, Sarah C'. A red arrow points to the 'Send' button at the bottom right of the form, next to a 'Cancel' button.

- 7. The FM Field Note will open. There are two options for having your supervisor complete the form.
 - a. Click “send to evaluator” at the bottom of the form. This will email a direct link your supervisor. They will click the link and complete the form.
 - b. Your supervisor can take over the computer and complete the form on the spot and then click “submit as evaluator”. Once submitted, a follow up email will be sent to your supervisor with a link to the completed form for security purposes.

The screenshot shows a row of four buttons: 'Save' (with a floppy disk icon), 'Send to Evaluator' (with an envelope icon), 'Submit as Evaluator' (with a checkmark icon), and 'Delete' (with a trash can icon).

QUESTIONS?

If you have any questions or difficulties with this process, please contact MedSIS at medsis@mcmaster.ca