

Health Education England Yorkshire and Humber, School of Psychiatry

Guidance for documenting individual trainee issues in educational meetings.

Source Documents:

1. Good Medical Practice (GMC 2013)
2. Confidentiality: good practice in handling patient information (GMC 2017)

Principles:

1. Within HEE and local trusts, information about trainees will be shared among clinical and educational supervisors, Training Programme Directors, Directors of Medical Education, HEE and local employer administrative staff, and other senior educators.
2. The sharing of information facilitates ARCP, rotation management and support for trainees experiencing difficulties. The ePortfolio will be accessible to clinical and educational supervisors, the Training Programme Director, the Head of School, the ARCP panel members, and the nominated HEE/local trust administrators.
3. The sharing of information pertaining to trainees following educational meetings should take place following the agreement of the trainee, and the information shared should be on a need to know basis, and for a specific purpose. Examples include: face to face meetings with trainees to discuss developmental needs, School Management Committee meetings to discuss trainees experiencing difficulties, and rotation planning meetings that discuss individual circumstances of trainees.
4. The distribution list for minuted meetings will be the responsibility of the chair of the meeting or author of the report/letter. Where a trainee's individual circumstances are discussed in a meeting of trainers he/she will not be identified in any subsequent minutes from the meeting.
5. Information about trainees is not to be shared with other trainees, unless with the expressed consent of the trainee, for example ePortfolio training.

Practice:

Educational providers, including Heads of School, Directors of Medical Education, Training Programme Directors, and Educational and Clinical Supervisors are required to review and document progress to support educational progression of trainees within their jurisdiction. This may include adherence to training requirements, positive achievements and review of any concerns.

When this occurs on a one to one basis directly with trainees, it is good practice for the educator to summarise the points of discussion, as a written document. This can be shared with the trainee and, with the prior consent, with others involved in supporting that trainee. This usually provides clarity to the trainee and for those working to support him/her. The trainee should include this as evidence within their portfolio.

When training rotations meet collectively to review trainees, for example to finalise training rotations, there will usually be discussions regarding a number of trainees. At these type of meetings, it is appropriate to agree general outcomes and for these to be recorded as minutes of the meeting. These can then be circulated in draft form to all attendees of the meeting. It is appropriate for the detailed discussions regarding individual trainees to be recorded separately for reference and omitted from formal meeting minutes. These discussions may be about PDP needs, curriculum delivery needs, personal circumstances relevant to a placement, or concerns suggesting a trainee is experiencing difficulty. In all cases this information would have been offered by or discussed with the trainee prior to the meeting. These can be held by the Training Programme Director and be used as required in any future eventuality.

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