

# FAQ: Note to File & Professional Behavioural Monitoring Forms<sup>1</sup>

## 1. What is the purpose of the Note to File?

**Note to File** forms are found in Elentra. The Note to File allows for the completion of a narrative report by anyone (e.g. resident, faculty, leader) with access to Elentra to *document compliments or concerns*.

The aim of the Note to File is to move from corridor conversations and emails to information in the resident's record (i.e. in Elentra).

The Note to File is an “embargoed assessment” which means that when completed, the Note to File is only viewable by the Program Director and Administrator. Upon review, and as appropriate, the Program Director can release the form as appropriate to the resident or Competence Committee.

For example, if a family wrote a note expressing their thanks, the Program Director can briefly summarize the exemplar actions of the resident. Another example might be that there was some concerning patterns of absence or lateness that the site supervisor wants to document for the Program Director. As the Note to File is a general document for a resident's record and may include notes about of advocacy, scholarship, and mentorship that fall outside of focused assessment tools.

## 2. What is the purpose of the Professional Behavioural Monitoring Forms?

The **Professional Behavioural Monitoring Form** is found in Elentra. It allows for the *documentation of a negative act/behaviour of particular concern*.

The aim of the Professional Behavioural Monitoring Forms is to document concerning behaviour in a consistent manner.

The Professional Behavioural Monitoring Forms is an “embargoed assessment” which means that when completed it is only viewable by the Program Director and Administrator. Upon review, and as appropriate, the Program Director can release the form as appropriate to the resident or Competence Committee.

## 3. Who initiates the forms?

**Note to File** and **Professional Behaviour Monitoring Forms** can be initiated by anyone including resident, faculty, other health professional team members, and leaders.

## 4. How do you find the forms?

After logging into Elentra:

- Click on **Start Assessment**;
- Under **On-Demand Workflow**;
- Select **Other Assessment Form** and pick the form that you want to complete.

Once the Assessor and Assessee are selected, choose the Note to File Form or the Professional Behavioural Monitoring Form to complete and submit.

For more information about these forms, contact Lisa St Amant or Susan Glover Takahashi via [cbme.pgme@utoronto.ca](mailto:cbme.pgme@utoronto.ca)

<sup>1</sup> Adapted Department of Medicine resource. Used with permission. PGME, Temerty Faculty of Medicine, University of Toronto, March 2021