Appendix 3
Guideline for documentation – SOT meeting with a trainee experiencing difficulty

Trainee details:
Name
College ID
Training period
Current training placement

Date issue raised:

1. Risk assessment – safe to practice?
   a. If NO discuss with Head of Department, consider immediate safety of patients and trainee, and consider rostered duties
   b. If YES proceed to 2.

2. What are the issues:
   a. Examination failure/failure to present
   b. Performance
   c. Professionalism or insight deficiencies
   d. Illness
   e. Global assessment concerns

3. Preparation for meeting with trainee
   i. History
   ii. Further assessment
   iii. Meeting plan
   iv. Meeting invitation – date, place, invitees

4. Meeting
   a. Discussion with trainee
   b. Action plan options
   c. Date of meeting
   d. Meeting attendees

5. Agreed plan
   a. Avenues for remediation
   b. Timeframe for remediation
   c. Monitoring of progress
   d. Review date
   e. Conclusion date
   f. Training time options
   g. Rostering options
   h. Discussion about commitments to other ANCZA activities eg. committee involvement and whether this is feasible
6. Please note
   a. Mentor
   b. Resource person(s)
   c. Support - Family/friends

Signatures:
Trainee -------------------
Supervisor of training -------------------

Date: ------/------/-------

- A copy of the meeting record will be provided to the trainee
- A copy of the meeting record will be kept in a confidential file by the SOT
- If a Trainee experiencing Difficulty Process (TDP) is planned, the Education Officer and Head of Department must be notified and provide copy of the meeting records.
- The Rotational Supervisor should be notified if a TDP is commenced.

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