To Do List ☑

Clerkship and Portfolio Checklist (Suggested Timeline)

Week 1

- ❑ 1. Create SMART goals.
- ❑ 2. Set up meeting with portfolio advisor for the following week.
- ❑ 3. Look at portfolio website to get ideas for portfolio content you'd like to try. (Generate ideas of how to meet goals.)
- ❑ 4. Set up a SIMPLE account if you do not have one already through CLIPPS.

Week 2 - 3

- ❑ 5. Arrange formative feedback sessions (ward attending is minimum requirement).
- ❑ 6. Enter a brief reflection on the formative feedback in your portfolio.
- ❑ 7. Make sure portfolio advisor has seen at least 1-2 write-ups and given feedback.
- ❑ 8. Update your post discharge phone call list if you have not been doing so all along.
- ❑ 9. Make sure you have entered at least 2 EBM questions you addressed in the course of patient care.
- ❑ 10. Update patient log.
- ❑ 11. Sign up for reflective writing session.
- ❑ 12. Contact Kathy to set up a brief meeting with either Dr. Harrell or Dr. Nall.

Week 4

- ❑ 13. Set up another meeting with portfolio advisor to review progress.
- ❑ 14. After reflecting on formative feedback, consider revising/updating SMART goals.
- ❑ 15. Start thinking of ideas for reflective writing.
- ❑ 16. Update patient log and upload portfolio entries you have been keeping on your computer.

- ❑ 17. Arrange feedback session with ward attending and house staff with who you worked.
- ❑ 18. Work on HVC modules.
- ❑ 19. You should have completed 4 SIMPLE cases by now.

Week 5

- ❑ 20. If not done week 4, consider revising/updating SMART goals and make sure portfolio content reflects them.
- ❑ 21. You should have received feedback on at least 4 write-ups. If not, either upload some or contact the clerkship director if your portfolio advisor hasn't responded.
- ❑ 22. Update patient log.

Week 6

- ❑ 23. Arrange formative feedback sessions (ward attending is minimum requirement).
- ❑ 24. Enter a brief reflection on the formative feedback in your portfolio.
- ❑ 25. Sign up for reflective writing session, if you haven't already.
- ❑ 26. Update your post discharge call record.
- ❑ 27. Make sure you have entered at least 6 EBM questions you addressed in the course of patient care.
- ❑ 28. Work on completing SIMPLE cases.
- ❑ 29. Update patient log.

Week 7

- ❑ 30. Arrange meeting with portfolio advisor to review progress and particularly to make sure write-ups and portfolio are on target
- ❑ 31. Start writing up descriptions and reflections about special things you did on the clerkship to improve your competence (if you haven't been doing this all along).
- ❑ 32. Try to finalize portfolio this weekend.
- ❑ 33. Update patient log
- ❑ 34. Evaluate noon conferences and you may start other clerkship evaluations (residents, faculty, portfolio advisors).

Week 8

❑	35. Make sure you have selected your best work for inclusion in the portfolio, that it is HIPAA compliant, and that anything you do not want viewed by Drs. Harrell or Nall has been archived.
❑	36. Write up any final reflections on your SMART goals.
❑	37. Complete your HVC modules.
❑	38. Update patient log.
❑	39. Complete peer and clerkship evaluations.