

Guidelines for Educational Handover in Competence by Design (CBD) Frequently Asked Questions

What is educational handover?

The primary goal of Educational Handover is to enable learner progression and inform entrustment decisions, while ensuring patient safety. In CBD, it is necessary for those in a supervisory role to have the opportunity to review assessment information about a learner's current stage of progression. As defined by the CBD Policy Advisory Working Group, **Educational Handover** is understood as, "a process by which information about a learner's performance is shared with future supervisors to facilitate guidance and progress."

What type of information will be shared in Educational Handover?

Although it will depend on the postgraduate policies developed at each institution situation, Educational Handover in CBD refers primarily to summative assessment information in the form of Entrustable Professional Activities (EPA) and milestones. This assessment information may also include educational objectives, areas of strength, challenges experienced to-date and/or any areas where patient safety may be of concern.

Who is responsible for sharing this information?

It is anticipated that learner assessment information will be shared by the program director with the subsequent rotation supervisor, coordinator or designated individual at a resident's future rotation. Those responsible for reviewing learner assessment information must ensure that learner privacy is respected and that assessment information is shared appropriately. This means that a clear process must be in place to govern what information is shared, when it is shared and that it is shared in a discrete manner. Only those who need to know will have access to assessment information. Sharing of learner information is to be performed exclusively for the purpose of informing entrustment decisions, and in preparing learners to progress to the next stage of training.

Is Educational Handover the same as forward feeding?

No, educational handover is not the same as forward feeding. Although these terms may have been used interchangeably in the past, we propose a clear distinction between them:

- **Forward feeding is tied to the time-based model:** In a time-based curriculum, 'forward feeding' occurs in exceptional circumstances where academic assistance is recommended because a learner is in difficulty, and targeted remediation or intervention is necessary to address concerns identified.
- **Educational Handover explicitly aligns with the shift to competency based medical education:** In CBD, assessment practices support and document a learner's progression across their training career. This information permits supervisors to provide ongoing, purposeful feedback that reflects real-time observations on learning.

Is learner consent required to conduct Educational Handover?

As these guidelines are aimed at supporting programs in developing their own local policies, there is no Royal College requirement that learner consent must be obtained, either in general or at each point when information is shared. Learner consent must be considered when creating a local solution, and careful attention must be given to how residents are informed of the Educational Handover process at their institution. This is a decision that rests with the Postgraduate office and should be determined within that context. In some cases, institutions may choose to incorporate a consent process into their Educational Handover policies.