



香港家庭醫學學院
The Hong Kong College of Family Physicians

Higher Training – briefing on Activity & Case log for Competency v7.2

From May 2026 onwards

Post Briefing update on 29/5/2026

Category List



A	B	C	D	E	F	G	H
Learning Type	Code						
Structural Educational Program (SEP)	SEP						
Self Directed Education Ex. (SDE) (Include Structural courses SC)	SDE						
Critical Appraisal Ex. (CAE)	CAE						
Elective (with Pre-approval if not included in content checklist) (E)	E						
Consultation Skills Review (CSR): sit in/Video/Case discussion	CSR						
Content Checklist		equivalent SEP module					
I: WORKING WITH FAMILIES	I	1,2					
II. INDIVIDUAL PATIENT CARE	II	3,6					
III. PREVENTIVE CARE AND CARE FOR PATIENTS WITH SPECIAL NEEDS	III	6					
IV. PROFESSIONAL DEVELOPMENT AND ETHICS	IV	3, 5, 8					
V. QUALITY ASSURANCE / PRACTICE AUDIT / RESEARCH	V	4, 5					
VI. HEALTH CARE SERVICE MANAGEMENT	VI	7					
Elective (with Pre-approval if not included in content checklist)	E						
O. Other content outside I to VI above	O						
SEP module							
1. Principles and Concepts of Working with Families	1						
2. Family Interview and Counseling	2						
3. Difficult Consultations and Ethical Dilemmas	3						
4. Clinical Audit and Research in Family Medicine	4						
5. Critical Appraisal	5						
6. Preventive Care and Patients with Special Needs	6						
7. Health Economics and Advanced Practice Management	7						
8. Teaching and Training	8						
O. Other content outside 1-8 above	O						
Case Log for competence							
Recording/Review mode							
1. Video recording							
2. Case log for discussion							
3. Audio recording							
4. Others, pls specify							
Video Submitted to BVTS 6 monthly:		number of video(s) submitted to the college (should be more than 16 videos)					



Please refer to the code table for record entry , it is applicable for activity log and case log

2 year HT

Please update your info,
training period x 4



香港家庭醫學學院
The Hong Kong College of Family Physicians

	B	C	D	E	F	G	H
1			Training Period	Interval			
2	Name of Trainee:	Dr CHAN TAI MAN		1-Feb-24	1		
3	Higher Training Start Date:	1/2/2024		1-Aug-24	2		
4	Higher Training End Date:	31/1/2028		1-Feb-25	3		
5	Clinical supervisor:	Dr LAM		1-Aug-25	4		
6		(1st 6 month)	2nd 6 month	3rd 6 month	4th 6 month		
7	Training period:	2/2024 - 7/2024	8/2024 - 1/2025	2/2025 - 7/2025	8/2025 - 1/2026		
8	Elective (Special Interest): Topic: ()				Yes / No	1 Elective training is mandatory, need prior approval if not listed in current content checklist.	Remarks: refer to 'activity
9	Self-directed Education Ex. (SDE)	hours	hours	hours	hours	Can be counted as SDE for 40 hours maximally	refer to 'activity
10	Critical Appraisal Ex. (CAE)	hours	hours	hours	hours	Minimum 40 hours per 6 months	refer to 'activity
11	Structural Educational Program (SEP)		hours		hours	Minimum 20 hours per 6 months	refer to 'activity
12	1. Principles and Concepts of Working with Families				hours	Minimum 40 hours per year & minimum 20 sessions per year;	
13	2. Family Interview and Counseling				hours	Minimum 6 hours per 2 month;	
14	3. Difficult Consultations and Ethical Dilemmas				hours	Minimum 8 hours in total per module within the 2-year higher training period	
15	4. Clinical Audit and Research in Family Medicine				hours		
16	5. Critical Appraisal				hours		
17	6. Preventive Care and Patients with Special Needs				hours		
18	7. Health Economics and Advanced Practice Management				hours		
19	8. Teaching and Training				hours		
20	Practice Management Package (PMP):	dd/mm/yyyy	dd/mm/yyyy	dd/mm/yyyy	dd/mm/yyyy	6 monthly (The first practice visit should be done within 3 months from enrolment)	
21	Practice visit: Medical Record Review including Investigation (PERMix Report ____)	1A: 1B:	2: 3A:	3B: 4:	5A: 5B:	PERMix can be done any time at least once per 3 month, submit report every 3-6 monthly according to the PERMix formative assessment schedule; 5A & 5B could be skipped for Exit preparation	
22	Consultation Skills Review (CSR): sit in/Video/Case discussion (PIs specify with * if with video submission)	dd/mm/yyyy	dd/mm/yyyy	dd/mm/yyyy	dd/mm/yyyy	CSR review on or more than 4 video-taped consultation at least every 6 monthly Sit in/videotaped/ Discussion sessions with case log for enhancing (demonstrating) higher skills competencies as specified in content checklist at least every 6 monthly; Keep related video assessed encrypted and submit upon college request	refer to 'Case lo
23	Feedback by Clinical Supervisor (Overall Training Progress)	Yes / No	Yes / No	Yes / No	Yes / No	Ongoing documentation; Need to have respective learning plans updated every 6 monthly and tally learning portfolio as below	
24	Learning Portfolio	Yes / No	Yes / No	Yes / No	Yes / No	6 monthly (and submit for review)	
25	Content Checklist (I to VI) with competence demonstrated	Yes / No	Yes / No	Yes / No	Yes / No	Please make reference to Activity log and competency log excel table to assess level of competency as demonstrated in	
26	2-year Activity & Case log for competence	Yes / No	Yes / No	Yes / No	Yes / No	Submit every 6 monthly for review	
27	Assessment by Clinical supervisors		dd/mm/yyyy		dd/mm/yyyy	Annually	
28	Annual Checklist		Yes / No		Yes / No	Annually	
29	100 patient seen profiles					Yes / No	#1-50: PA Part D submission & #51-100: PERMix 5B OR completed before the end of higher training (for non-exit)
30	Attendance of HKPCC					Yes / No	Once per two-year higher training
31	Recommendation for Exit Exam					Yes / No	After completion of 18 months training
32							
33							
34	* by supervisor						
35							

Category List | 2 year HT | Activity log for competence | Case Log for competence | Competency



Case Log for competence

Case log on demonstrated competence				Column E, F, G, H choose from drop down menu Please select either ONE (Core Competency (left) or Elective (right)) only			
Case No	Date of consultation	Patient GOPC no or other patient identifier	Sex/Age	Core Competency	Elective	Recording/Review mode 1. Video recording 2. Case log for discussion 3. Audio recording 4. Evidence * 5. Others, pls specify if 4. Evidence, please attach the evidence and mark the case no. (column A) on it	Video submitted to BVTs 6 monthly: ü if yes, or ú if no. if yes: submitted to BVTs, please mark the case no. (column A) on the video file name and CSR form
example	4/1/2024	GLTC19244417	F/38	III.A.ii. To individual pt		1. Video recording	Yes
1				IV. PROFESSIONAL DEVELOPMENT AND ETHICS		4. Evidence	No
2				III.A.i. Setting up an age-sex register of the practice		5. Others, pls specify	
3					Other	2. Case log for discussion	
4					Other	2. Case log for discussion	
5					Other	2. Case log for discussion	
6							
7							
8							
9							
10							
11				I. WORKING WITH FAMILIES			
12				II.A. High standard of Consultation skills in daily practice			
13				II.B. Difficult consultation			
14				II.C. Self awareness (Case discussion/review)			
15				III.A.i. Setting up an age-sex register of the practice			
16				III.A.ii. To individual pt			
17				III.A.iii. Organizing the practice			
18				III.A.iv. Providing health education to the community (w evidence)			
19							
20							
21							
22							
23							
24							
25							
26							
27							
28							
29							
30							

CSR:

This is your sit in/videotaped/ discussion sessions with case log for enhancing higher skills competencies as specified in content checklist

For Column E, F, G, H, please choose the option from drop down menu. Refer to the next slide. Once you put the record in "Case Log for competency" sheet, the case no. from column A will auto-fit into the core competence from column E (e.g. case no. 1 is I. WORKING WITH FAMILIES) in "Competency" sheet



As announced on 6 May 2026, the minimum number of case for competency

Competency demonstration of Content Checklist I, II, III, IV, VI (Updated in May 2026)

No-cross core competency category would be applied for each case. (e.g. if case 1 is I. WORKING WITH FAMILIES, it cannot be applied to another category again)

Core Competency Category (with reference to Content Checklist)	minimum number of case refer to worksheet "case log for competence"	Core Competency subcategory	Case no (w/ Case log sheet)	Elective	Case No
I. WORKING WITH FAMILIES	>= 5 cases	Defining the patient's stage in the life cycle	1	Elective	
		Drawing genograms		Bereavement counselling	
		Identifying family patterns		Counselling dysfunctional families	
		Anticipatory counselling on the different stages of the life cycle		Marital counselling	
		Family interview		Family therapy	
		Family assessment			
		i. Counselling the family of a patient with a major illness			
		ii. Appropriate use of other counsellors and community resources			
II. INDIVIDUAL PATIENT CARE					
II.A	= 5 case(s)	High standard of Consultation skills in daily practice			
II.B Difficult consultation	>= 5 cases	The Angry patients			
		The non-compliant patient			
		The passive aggressive patient			
		The manipulative patient			
		Disagreement on the diagnosis			
		Disagreement on the management			
		Complaints from patients			
		i. Transference reactions			
		ii. The real patient in the family			
		Conflicts of interests between an individual patient and the profession, or society			
II.C. Self Awareness	(w/ case discussion or review)	Demonstrate self awareness (Case discussion/review)			
		Emotional reaction to pt			
		Counter transference reaction			
		Limitations in own knowledge and skills			
		Importance of maintenance of own good health			
III. PREVENTIVE CARE AND CARE FOR PATIENTS WITH SPECIAL NEEDS					
III.A Preventive Care	(w/ evidence)	Setting up an age-sex register of the practice			
	= 1 case(s)	To individual pt			
		Assessing health risks of each patient according to demographic & family hx			
		Providing on-going anticipatory care that are appropriate to the patient			
		Advising his/her patients on life style changes			
	(w/ discussion)	Organizing the practice			
		To ensure appropriate preventive care is given to patients			
	(w/ evidence)	Providing health education to the community (w evidence)			
III.B Care of the Elderly		Understanding the normal aging process		Providing care to the elderly in old age homes	
		The concept of function as an outcome measure			

Refer to the previous slide. Once you put the record in "Case Log for competency" sheet, the case no. from column A will auto-fit into the core competence from column E (e.g. case no. 1 is I. WORKING WITH FAMILIES)

CONSULTATION SKILLS REVIEW

- LAP as the generic frame to demonstrate High standard of Consultation skills in Daily Practice (in Content Checklist IIA)
- Higher competencies demonstration needed in relation to requirement listed in Content Checklist I, II, III
- All Cases discussed should be log in Separate Excel sheet on Case log to demonstrate competence
- Detail comments to be listed in the 'CONSULTATION SKILLS REVIEW (Sessions) Detail Documentation (Mandatory)' sheet
- Overall consolidated recommendation can be put in Feedback by Clinical Supervisor"
- Respective learning portfolio will delineate detail related learning goals and activities to improve training progress
- For 6 monthly submission, at least 4 video cases need to be submitted with supervisor's detail comment listed in the forms attached

NAME OF TRAINEE: _____

CLINICAL SUPERVISOR: _____ DATE: _____

PLEASE RATE THE TRAINEE'S Level of competence in the following areas:

(0: Unaware, 1: Aware of deficiencies, 2: know skills, 3: Show and apply partly w effort, 4: Integration, 5: mastery)

Assessment Record

	Consultation (Sample)	Consultation 1	Consultation 2	Consultation 3	Consultation 4	Consultation 5	Consultation 6	Consultation 7	Consultation 8	Overall Competence Level (0-5)
Higher Competence	Family									
Generic Consultation Competence	Interview									
Interviewing and history taking (20%)	20%									
Physical Examination (10%)	10%									
Patient Management (20%)	20%									
Problem solving (20%)	20%									
Behaviour and relationship with patients (10%)	10%									
Anticipatory Care (10%)	10%									
Record Keeping (10%)	10%									
Total mark (100%)	100%									
Higher competence (0-5)	3									
Overall Level of Competence (0-5)	3									
(For trainee) Video Submitted to BVTS (if yes*, pls quo the case no.)	Yes*/No 1	Yes*/ No	Yes*/ No	Yes*/ No	Yes*/ No	Yes*/ No	Yes*/ No	Yes*/ No	Yes*/ No	

CONSULTATION SKILLS REVIEW (Sessions) Detail Documentation (Mandatory)

Supervisor:

Date	Nature of session (e.g Video, Sit in, Case discussion)	Comments by Supervisor

OVERALL COMMENTS ON CONSULTATION SKILLS:

Strengths:

Prioritised strategies for improvement in identified areas of weakness:

COMMENTS and Recommendation on Higher Competencies:



SELF-DIRECTED EDUCATION EXERCISES
Mandatory for HIGHER TRAINING
(Revised on 6th March 2024)
(Minimum 40 hours/6 months)

SDE No. ____
SEP module ____
Content Checklist ____

Date: _____ Number of hours: _____

Details of Educational Activity:

1. What is the relevance of the topic to your practice?

2. What new information have you learned?

3. Is the new information applicable to your practice? *Please delete if appropriate*
Yes *(Please go to Qn 4)*
No/Others *(please elaborate)* _____

4. How are you going to apply this new information to your daily practice?

5. Overall comments:

N.B. Please make copies of this form as needed.

Trial-run logbook version 12 (240726)

ELECTIVE (Special Interest)
Mandatory for HIGHER TRAINING
(40 hours maximally)

Approval: Y/N/NO
need

Period: _____ Number of hours: _____

Topic/ Title: _____ Organizer: _____

Details of Educational Activity:

1. What is the relevance of the topic to your practice?

2. What new information have you learned?

3. Is the new information applicable to your practice? *Please delete if appropriate*
Yes *(Please go to Qn 4)*
No/Others *(please elaborate)* _____

4. How are you going to apply this new information to your daily practice?

5. Overall comments:

N.B. Please make copies of this form as needed.

Trial-run logbook version 11 (240425)

CRITICAL APPRAISAL EXERCISES
Mandatory for HIGHER TRAINING
(Revised on 6th March 2024)
(Minimum 20 hours/6 months)

CAE No. ____
SEP module ____
Content Checklist ____

Date: _____ Number of hours: _____

Scientific Article Citation (Vancouver Style):

Type of Articles: *Please tick if appropriate*
 Systematic Review Randomized Controlled Trial Cohort study
 Qualitative Study Case Control Study Others

Research Methodology:

Patient/ Problem/ (Sample size)	
Interventions/ Control (if any)	
Research Aims & Objectives	
Data Collection Measuring Outcomes	
Results	

1. Is the Research Methodology sound and focused? If not, how can this Research Methodology be done better?

2. How can this Research help your local daily practice?

N.B. Please make copies of this form as needed.

Trial-run logbook version 12 (240726)

(from left to right) Here's the SDE, Elective, CAE activity log sheet



Ref. Sheet no.	Interval (period)	Date (DD/MM/YYYY)	Number of Hours (less than 5 hours per day)	Learning Type	Content Checklist	SEP module (1-8)	Competencies demonstrated
240313SDE-6-III	1	13 Mar 2024	1	SDE	III	3	
240314SDE-6-III	1	14 Mar 2024	4	SDE	III	6	
240328SDE-6-III	1	28 Mar 2024	2	SDE	III	6	
240411SDE-6-III	1	11 Apr 2024	2	SDE	III	6	

SELF-DIRECTED EDUCATION EXERCISES
Mandatory for HIGHER TRAINING
(Revised on 6th March 2024)
(Minimum 40 hours/6 months)

Ref. sheet no.
240314SDE-6-III

SDE No ____
SEP module ____
Content Checklist ____

Date: 14/3/2024 Number of hours: 4

Please put the ref. sheet no to each SDE / CAE activity log sheet as shown



Ref. Sheet no.	Interval (period)	Date (DD/MM/YY)	Number of Hours (less than 5 hours per day)	Learning Type	Content Checklist	SEP module (1-8)	Competencies demonstrated
240313SDE-3-III	1	13 Mar 2024	1	SDE	III	3	
240314SDE-6-III	1	14 Mar 2024	4	SDE	III	6	
240328SDE-6-III	1	28 Mar 2024	2	SDE	III	6	
240411SDE-6-III	1	11 Apr 2024	2	SDE	III	6	
240506SDE-6-II	1	6 May 2024	2	SDE	II	6	
240509SDE-6-III	1	9 May 2024	4	SDE	III	6	
240513SDE-6-III	1	13 May 2024	2	SDE	III	6	
240516SDE-6-III	1	16 May 2024	4	SDE	III	6	
240520SDE-6-II	1	20 May 2024	2	SDE	II	6	
240527SDE-6-III	1	27 May 2024	2	SDE	III	6	
240603SDE-6-III	1	3 Jun 2024	2	SDE	III	6	
240607SDE-3-III	1	7 Jun 2024	1	SDE	III	3	
240613SDE-6-III	1	13 Jun 2024	2	SDE	III	6	
240620SDE-7-III	1	20 Jun 2024	2	SDE	III	7	
240621SDE-3-III	1	21 Jun 2024	1	SDE	III	3	
240627SDE-7-III	1	27 Jun 2024	2	SDE	III	7	
240711SDE-3-III	1	11 Jul 2024	1	SDE	III	3	
240711SDE-8-VI	1	11 Jul 2024	4	SDE	VI	8	
240807SDE-3-III	2	7 Aug 2024	2	SDE	III	3	
240814SDE-3-III	2	14 Aug 2024	1	SDE	III	3	
240907SDE-7-III	2	7 Sept 2024	4	SDE	III	7	
240920SDE-3-III	2	20 Sept 2024	4	SDE	III	3	
241207SDE-6-III	2	7 Dec 2024	4	SDE	III	6	
241210SDE-3-III	2	10 Dec 2024	1	SDE	III	3	
241213SDE-3-III	2	13 Dec 2024	1	SDE	III	3	
250303SDE-3-III	3	3 Mar 2025	2	SDE	III	3	
250514SDE-6-III	3	14 May 2025	4	SDE	III	6	
250528SDE-3-III	3	28 May 2025	1	SDE	III	3	
250701SDE-6-III	3	1 Jul 2025	2	SDE	III	6	
250717SDE-3-III	3	17 Jul 2025	1	SDE	III	3	
250730SDE-3-III	3	30 Jul 2025	1	SDE	III	3	
250808SDE-6-III	4	8 Aug 2025	3	SDE	III	6	
250810SDE-6-III	4	10 Aug 2025	2	SDE	III	6	
250823SDE-3-II	4	23 Aug 2025	4	SDE	II	3	
250830SDE-3-III	4	30 Aug 2025	2	SDE	III	3	

Interval (period)

- 1
- 2
- 3
- 4
- #N/A

Content Checkl...

- II
- III
- IV
- VI
- E
- I
- V
- (blank)

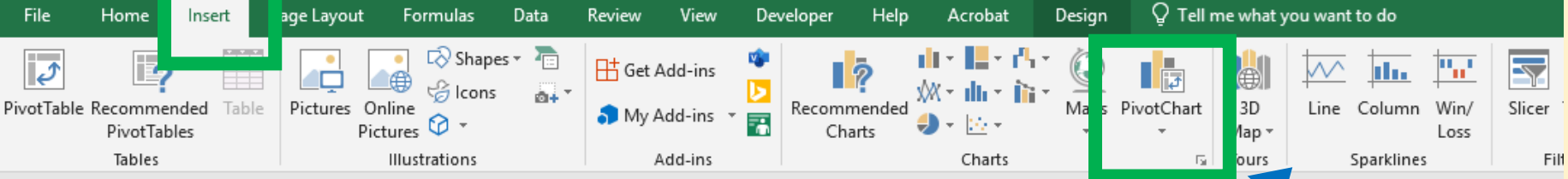
Learning Type

- SEP
- CAE
- CSR
- E
- SDE
- (blank)

SEP module (1-8)

- 3
- 6
- 7
- 8
- 1
- 2
- 4
- 5
- 0
- (blank)

You can select the type by this 4 tables for your reference



You also can select the
“PivotChart” under
“Insert”

	A	B	C	D	E	F	G	H	I	J	K
	Ref. Sheet no.	Interval (period)	Date (DD/MM/YY)	Number of Hours (less than 5 hours per day)	Learning Type	Content Checklis	SEP module (1-8)	Competencies demonstrated	Interval (period)	Content Checklis	SEP module (1-8)
10	240313SDE-3-III	1	13 Mar 2024	1	SDE	III	3		1	II	3
11	240314SDE-6-III	1	14 Mar 2024	4	SDE	III	6		2	III	6
14	240328SDE-6-III	1	28 Mar 2024	2	SDE	III	6		3	IV	6
18	240411SDE-6-III	1	11 Apr 2024	2	SDE	III	6		4	VI	6
21	240506SDE-6-II	1	6 May 2024	2	SDE	II	6		#N/A	E	6
23	240509SDE-6-III	1	9 May 2024	4	SDE	III	6			I	6
26	240513SDE-6-III	1	13 May 2024	2	SDE	III	6			V	6
27	240516SDE-6-III	1	18 May 2024	4	SDE	III	6			(blank)	6
28	240520SDE-6-II	1	20 May 2024	2	SDE	II	6				6
29	240527SDE-6-III	1	27 May 2024	2	SDE	III	6				6
31	240603SDE-6-III	1	3 Jun 2024	2	SDE	III	6				6
32	240607SDE-3-III	1	7 Jun 2024	1	SDE	III	3				3
36	240613SDE-6-III	1	13 Jun 2024	2	SDE	III	6				6
38	240620SDE-7-III	1	20 Jun 2024	2	SDE	III	7				7
39	240621SDE-3-III	1	21 Jun 2024	1	SDE	III	3				3
40	240627SDE-7-III	1	27 Jun 2024	2	SDE	III	7				7
42	240711SDE-3-III	1	11 Jul 2024	1	SDE	III	3				3
43	240711SDE-8-VI	1	11 Jul 2024	4	SDE	VI	8				8
45	240807SDE-3-III	2	7 Aug 2024	2	SDE	III	3				3
47	240814SDE-3-III	2	14 Aug 2024	1	SDE	III	3				3
53	240907SDE-7-III	2	7 Sept 2024	4	SDE	III	7				7
54	240920SDE-3-III	2	20 Sept 2024	4	SDE	III	3				3
61	241207SDE-6-III	2	7 Dec 2024	4	SDE	III	6				6
62	241210SDE-3-III	2	10 Dec 2024	1	SDE	III	3				3
64	241213SDE-3-III	2	13 Dec 2024	1	SDE	III	3				3
78	250303SDE-3-III	3	3 Mar 2025	2	SDE	III	3				3
90	250514SDE-6-III	3	14 May 2025	4	SDE	III	6				6
93	250528SDE-3-III	3	28 May 2025	1	SDE	III	3				3
97	250701SDE-6-III	3	1 Jul 2025	2	SDE	III	6				6
100	250717SDE-3-III	3	17 Jul 2025	1	SDE	III	3				3
101	250730SDE-3-III	3	30 Jul 2025	1	SDE	III	3				3
102	250808SDE-6-III	4	8 Aug 2025	3	SDE	III	6				6
104	250810SDE-6-III	4	10 Aug 2025	2	SDE	III	6				6
110	250823SDE-3-II	4	23 Aug 2025	4	SDE	II	3				3
112	250830SDE-3-III	4	30 Aug 2025	2	SDE	III	3				3
121	251013SDE-3-III	4	13 Oct 2025	1	SDE	III	3				3
131	260413SDE-3-IV	4	13 Apr 2026	2	SDE	IV	3				3

K1 Ref. Sheet no.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	Ref. Sheet no.	Interval (period)	Date (DD/MM/YY)	Number of Hours (less than 5 hours per day)	Learning Typ	Content Checklis											
2	240201SEP-3-III	1	1 Feb 2024	2	SEP	III											
3	240215SEP-2-III	1	15 Feb 2024	2	SEP	III											
8	240310CAE-3-III	1	10 Mar 2024	2	CAE	III											
9	240310CAE-3-III	1	10 Mar 2024	2	CAE	III											
10	240313SDE-3-III	1	13 Mar 2024	1	SDE	III											
11	240314SDE-6-III	1	14 Mar 2024	4	SDE	III											
14	240328SDE-6-III	1	28 Mar 2024	2	SDE	III											
15	240401CAE-5-III	1	1 Apr 2024	2	CAE	III											
16	240402CAE-8-III	1	2 Apr 2024	2	CAE	III											
17	240409CAE-5-III	1	9 Apr 2024	2	CAE	III											
18	240411SDE-6-III	1	11 Apr 2024	2	SDE	III											
19	240411SEP-3-III	1	11 Apr 2024	2	SEP	III											
23	240509SDE-6-III	1	9 May 2024	4	SDE	III											
25	240510CAE-5-III	1	10 May 2024	2	CAE	III											
26	240513SDE-6-III	1	13 May 2024	2	SDE	III											
27	240516SDE-6-III	1	18 May 2024	4	SDE	III											
29	240527SDE-6-III	1	27 May 2024	2	SDE	III											
30	240530SEP-1-III	1	30 May 2024	2	SEP	III											
31	240603SDE-6-III	1	3 Jun 2024	2	SDE	III											
32	240607SDE-3-III	1	7 Jun 2024	1	SDE	III											
34	240609CAE-5-III	1	9 Jun 2024	2	CAE	III											
35	240610CAE-3-III	1	10 Jun 2024	2	CAE	III											
36	240613SDE-6-III	1	13 Jun 2024	2	SDE	III	6										
37	240613SEP-2-III	1	13 Jun 2024	2	SEP	III	2										
38	240620SDE-7-III	1	20 Jun 2024	2	SDE	III	7										
39	240621SDE-3-III	1	21 Jun 2024	1	SDE	III	3										
40	240627SDE-7-III	1	27 Jun 2024	2	SDE	III	7										
42	240711SDE-3-III	1	11 Jul 2024	1	SDE	III	3										
45	240807SDE-3-III	2	7 Aug 2024	2	SDE	III	3										
47	240814SDE-3-III	2	14 Aug 2024	1	SDE	III	3										
50	240901CAE-5-III	2	1 Sept 2024	2	CAE	III	5										
51	240904CAE-5-III	2	4 Sept 2024	2	CAE	III	5										
53	240907SDE-7-III	2	7 Sept 2024	4	SDE	III	7										
54	240920SDE-3-III	2	20 Sept 2024	4	SDE	III	3										
55	241002CAE-5-III	2	2 Oct 2024	2	CAE	III	5										
60	241205SEP-6-III	2	5 Dec 2024	2	SEP	III	6										
61	241207SDE-6-III	2	7 Dec 2024	4	SDE	III	6										
62	241210SDE-3-III	2	10 Dec 2024	1	SDE	III	3										
64	241213SDE-3-III	2	13 Dec 2024	1	SDE	III	3										
65	241230CAE-5-III	2	30 Dec 2024	2	CAE	III	5										
66	241231CAE-3-III	2	31 Dec 2024	2	CAE	III	3										
68	250108CAE-5-III	2	8 Jan 2025	2	CAE	III	5										
69	250109CAE-5-III	2	9 Jan 2025	2	CAE	III	5										
70	250110CAE-5-III	2	10 Jan 2025	2	CAE	III	5										
71	250116CAE-5-III	2	16 Jan 2025	2	CAE	III	5										
72	250120SEP-2-III	2	20 Jan 2025	2	SEP	III	2										

Create PivotChart

Choose the data that you want to analyze

- Select a table or range
 - Table/Range: Table1
- Use an external data source
 - Choose Connection...
 - Connection name:
 - Use this workbook's Data Model

Choose where you want the PivotChart to be placed

- New Worksheet
- Existing Worksheet
 - Location: 'activity log for competence'!\$K\$1:\$Q\$35

Choose whether you want to analyze multiple tables

- Add this data to the Data Model

OK Cancel

Content Checklis

- I
- II
- III
- IV
- V
- VI
- (blank)

SEP module (1-8)

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- O



Learning Typ	Content Checklis	SEP module (1-8)	Competencies demonstrated
SEP	III	3	
SEP	III	2	
CAE	III	3	
CAE	III	3	
SDE	III	3	
SDE	III	8	
SDE	III	8	
CAE	III	5	
CAE	III	8	
CAE	III	5	
SDE	III	8	
SEP	III	3	
SDE	III	8	
CAE	III	5	
SDE	III	8	
SDE	III	8	
SDE	III	8	
SDE	III	8	
CAE	III	5	
CAE	III	3	
SDE	III	8	
SEP	III	1	
SDE	III	8	
SDE	III	3	
CAE	III	5	
CAE	III	3	
SDE	III	8	
SEP	III	2	
SDE	III	7	
SDE	III	3	
SDE	III	7	
SDE	III	3	
SDE	III	3	
CAE	III	5	
CAE	III	5	
SDE	III	7	
SDE	III	3	
SDE	III	3	
CAE	III	5	
CAE	III	3	
CAE	III	5	
CAE	III	5	
CAE	III	5	
CAE	III	5	
SEP	III	8	
SDE	III	8	
SDE	III	3	
SDE	III	3	
CAE	III	5	
CAE	III	3	
CAE	III	5	
CAE	III	5	
CAE	III	5	
SEP	III	2	

Interval (period)

- 1
- 2
- 3
- 4
- #N/A

Content Checkl...

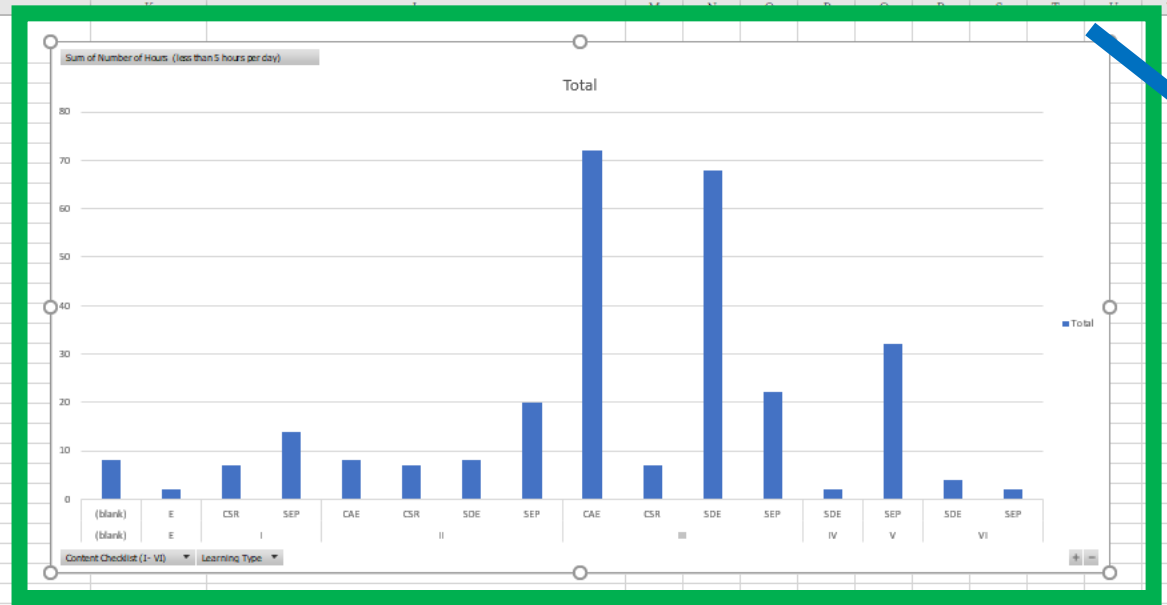
- E
- I
- II
- III
- IV
- V
- VI
- (blank)

Learning Type

- SEP
- CAE
- CSR
- SDE
- E
- (blank)

SEP module (1-8)

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 0



PivotChart Fields

Active All

Choose fields to add to report:

Search

Table1

- Ref. Sheet no.
- Interval (period)
- Date (DD/MM/YYYY)
- Number of Hours (less than 5...
- Learning Type
- Content Checklist (I- VI)
- SEP module (1-8)
- Competencies demonstrated

Drag fields between areas below:

Filters

Legend (Series)

Axis (Categori...)

Content Che...
Learning Type

Σ Values

Sum of Numb...
Total

Defer Layout Update

a chart is formed
6 monthly for
supervisor review

CONTENT CHECK LISTS FOR HIGHER TRAINING

I. WORKING WITH FAMILIES

The trainee has acquired the following knowledge, skills and demonstrated competence as listed:

- A. Knowledge:
- Different stages of the family life cycle
 - Tasks and problems associated with leaving home
 - Tasks and problems associated with getting married
 - Tasks and problems of a couple living together
 - Tasks and problems of parenting the first child
 - Tasks and problems of living with the adolescent
 - Tasks and problems of the empty nest phase
 - Tasks and problems of retirement
 - Tasks and problems of old age
 - The family system theory
 - The characteristics of a healthy family
 - Causes of family dysfunction
 - Patterns in families

- B. Skills:
- Defining the patient's stage in the life cycle
 - Drawing genograms
 - Identifying family patterns
 - Anticipatory counselling on the different stages of the life cycle
 - Family interview
 - Family assessment
 - Counselling the family of a patient with a major illness
 - Appropriate use of other counsellors and community resources
 - Bereavement counselling (Elective)
 - Counselling dysfunctional families (Elective)
 - Marital counselling (Elective)
 - Family therapy (Elective)

Competence demonstrated: please refer to Activity and Competence Case log

Certification by clinical supervisor: _____

Signature /Name in Block Letter ()

Date

II. INDIVIDUAL PATIENT CARE

- A. The trainee demonstrates a high standard of skills and competence in his/her daily practice in:-
- A patient centered clinical interview
 - Effective problem solving
 - Cost-effective use of resources including time, investigation, specialist services, and community resources
 - Sharing of the understanding of the problem with the patient
 - Identification with the patient on the most appropriate management plan
 - Involvement of the patient in the management
 - Setting a long-term plan of management
 - Measuring outcome of management
 - Evaluation of other significant problems
 - Non-directive counselling
 - Rational prescribing
 - Setting a long-term plan of management
 - Effective communication with other medical colleagues
 - Effective communication with others involved in the care of patients
 - Effective co-ordination of care
 - Maintaining a trustful doctor-patient relationship

- B. The trainee is able to handle the following difficult consultation situations:
- The angry patient
 - The non-compliant patient
 - The passive aggressive patient
 - The manipulative patient
 - Disagreement on the diagnosis
 - Disagreement on the management
 - Complaints from patients
 - Transference reactions
 - The real patient in the family
 - Conflicts of interests between an individual patient and the profession, or society

- C. The trainee should be aware of:
- Emotional reactions to patients
 - Counter transference reaction
 - Limitations in his/her own knowledge and skills
 - Importance of maintenance of good health in his/herself

Competence demonstrated: please refer to Activity and Competence Case log

Certification by clinical supervisor: _____

Signature /Name in Block Letter ()

Date

III. PREVENTIVE CARE AND CARE FOR PATIENTS WITH SPECIAL NEEDS

The trainee has shown knowledge, skills and competence in:

- A. Preventive care
- Setting up an age-sex register of the practice
 - Providing on-going anticipatory and preventive care that are appropriate to the patient
 - Assessing the health risks of each patient according to the patient's demographic and family characteristics
 - Organizing the practice to ensure appropriate preventive care is given to patients
 - Advising his/her patients on life style changes
 - Providing health education to the community (invitation letter/e-mail attached)
Date: _____
Activity: _____
- B. Care of the Elderly
- Understanding the normal aging process
 - The concept of function as an outcome measure
 - Prevention, early diagnosis and management of common functional impairment in hearing, vision and mobility
 - Prevention, early diagnosis and continuing management of common chronic diseases like hypertension, diabetes mellitus, and stroke
 - Diagnosis and management of psychological problems in the elderly especially depression
 - Diagnosis and management of dementia
 - Use of community resources for the elderly
 - Appropriate use of specialist help
 - Providing care to the elderly in old age homes (Elective)
- C. Women's health
- Cost-effective health screening for women
 - Screening for cervical neoplasia
 - Screening for breast carcinoma by examination, breast self-examination and/or mammography for the high risk group
 - Special well women health screening clinic
 - Family planning counselling
 - Premenstrual symptoms
 - Common menstrual problems
 - Common problems related to menopause
 - Hormone replacement therapy
 - Osteoporosis
 - Domestic violence
- D. Patients with Terminal Illnesses
- Breaking bad news
 - Co-ordination of care with other specialists

IV. PROFESSIONAL DEVELOPMENT AND ETHICS

The trainee has acquired the knowledge and skills in:

- A. Professional Development:
- Identifying his/her own competence and deficiencies
 - Making realistic learning plans
 - Carrying out learning plans
 - A well-balanced self-directed learning portfolio
 - Critically appraisal of information on Therapeutics
 - Critically appraisal of information on diagnostic tests
 - Critically appraisal of information on disease prognosis
 - Critically appraisal of information on disease aetologies
 - Constructive challenge of old and new information
 - Applying new knowledge and skills in patient care in the appropriate context
 - Receiving formative assessment and constructive feedback
 - Sharing knowledge and skills with others
 - Participating in quality assurance activities
- B. Professional Ethics:
- The responsibility of the doctor to the individual patient
 - The responsibility of the doctor to society
 - The responsibility of the doctor to the medical profession
 - Professional codes of ethics
 - The balance between the four main ethical issues of beneficence, justice, do no harm and confidentiality
 - Patient's rights and autonomy
 - Helping patients to make informed consents and choices
 - Handling patient's complaints
 - Attitudes towards abortions
 - Contraception for minors
 - Assisted human reproduction

V. QUALITY ASSURANCE / PRACTICE AUDIT / RESEARCH

The trainee will need to complete either an audit cycle on an important clinical aspect of his/her work or a research project. A report of the clinical audit or research has to be submitted to the Board of Vocational Training and Standards for assessment at the end of Higher training.

For audit segment, you should demonstrate the ability in:

- Identifying an important issue in his/her work that needs to be assessed
- Literature search
- Setting audit criteria and standards
- Reviewing his/her own performance against set criteria
- Comparing performance to standards
- Identifying areas for improvement
- Developing strategies to improve practice up to the standards
- Implementing changes
- Reassessment of performance
- Evaluating improvement
- Planning for further improvement
- Medical writing

For research segment, you should demonstrate your ability in:

- Generate and define a research question
- Carry out a research using appropriate methodology and analyze the results
- Discuss the significance of the findings

Details could be obtained from guideline on Exit Examination of Vocational Training in Family Medicine, The Hong Kong College of Family Physicians.

VI. HEALTH CARE SERVICE MANAGEMENT

The trainee is able to:

- Identify the need of the practice population
- Understand the role of family medicine in different health care delivery systems
- Understand the different health care payment systems
- Set priorities in the allocation of limited resources
- Assess the need of the community
- Respond to the need of the community
- Balance supply, need and demand
- Use medical information systems appropriately

Competence demonstrated by individual presentation on analysis of own clinic and nearby practice population's health care condition as listed above

Certification by clinical supervisor: _____

Signature /Name in Block Letter ()

Date

So that supervisor could make reference to Activity Log and Case log Competence excel to assess level of competency as demonstrated in respective Content Checklist and certify the content checklist

QA&A

Questions:

1) Is "CORE" competency the same as "HIGHER" competency?

If NO, what does "higher competency" refer to?

If YES, why do we use different terminology?

2) For CSA marking in log book, there are "Higher Competency" and "Special skills (in relation to Higher competencies listed respectively)" on left column of the table.

Are we expected to choose competency from the CORE competency list?

What is the difference between "Higher competency" and "Special skills (in relation to Higher competencies listed respectively)", can you give some more examples what content is expected to fill in?

3) For hormonal replacement therapy (core competence III.C. Women Health, v), is it really a must to see 1 case on this topic? Any problem if we do not encounter eventually? Will College consider to combine it with III.C.iv - menopause symptom and management?"

4) Some competencies are difficult (problems of consent, and possibly affecting natural flow of normal consultation) to videotape or record audio. Are those mainly achieved by case discussion e.g. angry patients, breaking bad news, domestic violence?

5) May I ask what is the requirement for each case to be counted as "Case discussion", "Review" and "Evidence" according to the competency checklist

6) Does this updated excel apply to higher 2? Thank you.

Post-Briefing add-ons

These updates are not covered in the recorded video briefing.

Please review these slides thoroughly.

29/5/2026

Case Log for competence

A	B	C	D	E	F	G	H	I
Column E, F, G, H choose from drop down menu								
Please select either ONE (Core Competency (left) or Elective (right)) only								
Case No	Date of consultation	Patient GOPC no or other patient identifier	Sex/Age	Core Competency	Elective	Recording/Review mode 1. Video recording 2. Case log for discussion 3. Audio recording 4. Evidence * 5. Others, pls specify if 4. Evidence, please attach the evidence and mark the case no. (column A) on it	Video submitted to BVTs 6 monthly: ü if yes, or ü if no. if yes: submitted to BVTs, please mark the case no. (column A) on the video file name and CSR form	if Recording/ Review mode is 5. Others, pls specify here
example	4/1/2024	GLTC19244417	F/38	IIIA.ii. To individual pt		1. Video recording	Yes	
1	31/12/2025			VI. HEALTH CARE SERVICE MANAGEMENT		4. Evidence	No	
2	1/1/2026			IIIA.i. Setting up an age-sex register of the practice		4. Evidence	No	
3	5/1/2026	GOPC1234	F/38		Other	2. Case log for discussion	No	
4	8/1/2026	GOPC2234	M/39		Other	2. Case log for discussion	No	
5	10/1/2026	GOPC3234	F/40		Other	2. Case log for discussion	No	
6	20/1/2026			IIIA.iv. Providing health education to the community (w evidence)		4. Evidence	No	

Column F: Elective
Drop menu with "Other" option

For example, Case no. 3:
If elective select "Other" with 2. case log for discussion.

The case no. 3 will auto-fit into the competency at row 65 column F

63	IV. PROFESSIONAL DEVELOPMENT AND ETHICS	(w/ evidence) (OPTIONAL for Higher 2)	Teaching and Training by Trainee (e.g. Target group, topic, occasion)					
64	VI. HEALTH CARE SERVICE MANAGEMENT	(w/ evidence)	Individual Presentation on LOCAL Health Care Service Management		1			
65	O. Other content outside I to VI above (e.g. POCUS)	n/a				Please specify here: (POCUS)		3,4,5

Case Log for competence

A	B	C	D	E	F	G	H	I
Column E, F, G, H choose from drop down menu								
Please select either ONE (Core Competency (left) or Elective (right)) only								
Case No	Date of consultation	Patient GOPC no or other patient identifier	Sex/Age	Core Competency	Elective	Recording/Review mode 1. Video recording 2. Case log for discussion 3. Audio recording 4. Evidence * 5. Others, pls specify if 4. Evidence, please attach the evidence and mark the case no. (column A) on it	Video submitted to BVTs 6 monthly: ü if yes, or û if no. if yes: submitted to BVTs, please mark the case no. (column A) on the video file name and CSR form	if Recording/ Review mode is 5. Others, pls specify here
example	4/1/2024	GLTC19244417	F/38	III.A.ii. To individual pt		1. Video recording	Yes	
1	31/12/2025			VI. HEALTH CARE SERVICE MANAGEMENT		4. Evidence	No	
2	1/1/2026			III.A.i. Setting up an age-sex register of the practice		4. Evidence	No	
3	5/1/2026	GOPC1234	F/38		Other	2. Case log for discussion	No	
4	8/1/2026	GOPC2234	M/39		Other	2. Case log for discussion	No	
5	10/1/2026	GOPC3234	F/40		Other	2. Case log for discussion	No	
6	20/1/2026			III.A.iv. Providing health education to the community (w/ evidence)		4. Evidence	No	

Column G: Recording/ Review mode
Drop menu with "4. Evidence" option

For example, Case no. 2:

If select "4. Evidence" that may not have patient consultation info (Patient GOPC number, Sex, Age). E.g. give public health talk, column C & D is empty. Please mark case no. 2 and attach the evidence (e.g. the invitation letter to the health talk) to the logbook as proof. The case no. 2 will auto-fit into the competency at row 27 column D

25				-Importance of maintenance of own good health	
26	III. PREVENTIVE CARE AND CARE FOR PATIENTS WITH SPECIAL NEEDS				
27	III.A Preventive Care	(w/ evidence)	i. Setting up an age-sex register of the practice		2
28		>= 1 case(s)	ii. To individual pt -Assessing health risks of each patient according to demographic & family hx -Providing on-going anticipatory care that are appropriate to the patient -Advising his/her patients on life style changes		

A	B	C	D	E	F	G	H	I
Column E, F, G, H choose from drop down menu								
Please select either ONE (Core Competency (left) or Elective (right)) only								
Case No	Date of consultation	Patient GOPC no or other patient identifier	Sex/Age	Core Competency	Elective	Recording/Review mode 1. Video recording 2. Case log for discussion 3. Audio recording 4. Evidence * 5. Others, pls specify if 4. Evidence, please attach the evidence and mark the case no. (column A) on it	Video submitted to BVTs 6 monthly: ü if yes, or ü if no. if yes: submitted to BVTs, please mark the case no. (column A) on the video file name and CSR form	if Recording/Review mode is 5. Others, pls specify here
example	4/1/2024	GLTC19244417	F/38	III.A.ii. To individual pt		1. Video recording	Yes	
1	5/1/2026			VI. HEALTH CARE SERVICE MANAGEMENT		4. Evidence	No	
2	1/1/2026			III.A.i. Setting up an age-sex register of the practice		4. Evidence	No	
3	5/1/2026	GOPC1234	F/38		Other	2. Case log for discussion	No	
4	8/1/2026	GOPC2234	M/39		Other	2. Case log for discussion	No	
5	10/1/2026	GOPC3234	F/40		Other	2. Case log for discussion	No	
6	20/1/2026			III.A.iv. Providing health education to the community (w evidence)		4. Evidence	No	



For video submitted to BVTs 6 monthly (column H)
If yes, please quo the case no. (column A) on the
video recorded file name and CSR form.

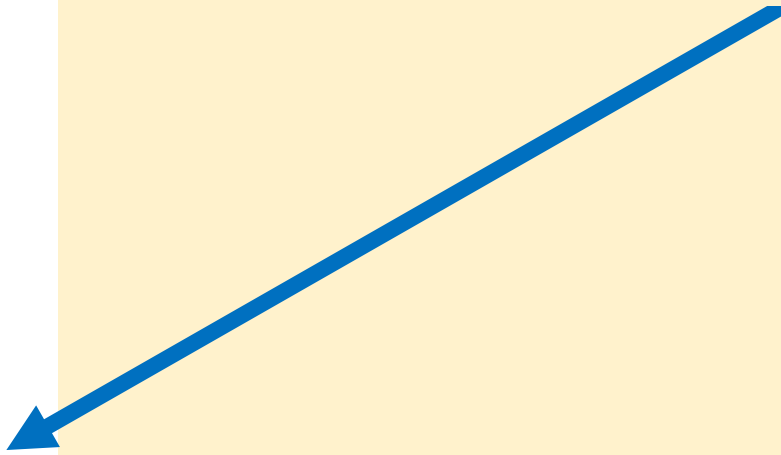
ASSESSMENT OF CONSULTATION SKILLS –CONSULTATION SKILLS REVIEW (updated on 28 May 2026)

NAME OF TRAINEE: _____

CLINICAL SUPERVISOR: _____ DATE: _____

PLEASE RATE THE TRAINEE'S Level of competence in the following areas:
(0: Unaware, 1: Aware of deficiencies, 2: know skills, 3: Show and apply partly w effort, 4: Integration, 5: mastery)

	Consultation	Consultation	Consultation	Consultation	Consultation	Consultation	Consultation	Consultation	Consultation	Competence
	(Sample)	1	2	3	4	5	6	7	8	Level
Higher Competence	Family									
Generic Consultation Competence	Interview									
Interviewing and history taking	20%									
Physical Examination	10%									
Patient Management	20%									
Problem solving	20%									
Behaviour and relationship with patients	10%									
Anticipatory Care	10%									
Record Keeping	10%									
Total mark	100%									
Higher competence	(0 - 5)									
Overall Level of Competence	(0 - 5)									
(For trainee) Video Submitted to BVTs (if yes*, pls quo the case no.)	Yes/ No 1	Yes/ No	Yes/ No	Yes/ No	Yes/ No	Yes/ No	Yes/ No	Yes/ No	Yes/ No	





香港家庭醫學學院
The Hong Kong College of Family Physicians

Thank you!

Should you have any inquiries, please contact Hannah or Kathy:

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Tel: 2871 8899