

Assigned Educational Supervisor

ISCP Step by Step Guide



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Introduction

Version 10 of the ISCP, available from August 2016, is a re-design and rebuild of the web-based training management system which supports the curriculum. We hope you will find it easier to use, more intuitive and quicker.

Some of the improvements are:

- Multiple document upload in areas such as *Other evidence*
- Increased storage space of documents (up to 5MB each and in total 200MB).
- Simultaneous trainee-trainer sign off of tasks such as *Learning Agreement* meetings
- Optimisation for use on mobile devices
- Ability for a single login to cover both the surgical and dental user view

This guide focuses on the areas of the ISCP that you will use most frequently. From time to time, as further releases provide new interactive tools and electronic processes, this guide will be updated.

General navigation

- All mandatory fields are underlined in orange.
- Not completing mandatory fields will result in an error message and required fields will be shaded pink. The required items will be listed at the top of the page.
- When you see this icon,  hovering on it will provide some help text.
- Tabs for sending us your *Feedback* and finding more *Help* can be seen on the right-hand side of each page. Help text is not yet available on all pages.
- Text entry fields in the system can search as you type for a person or place e.g. when sending a message to another person or adding an assessor.
- Links across the site **look like this**.
- Areas of the site show a downward arrow  for accessing more content on a page. Click on the arrow to open further content and click on it again to close it.
- Browsers; note that v10 does not support Internet Explorer version 7 or below.
- The ISCP Helpdesk is available 9am-5pm Monday to Friday and can be contacted by phoning **020 7869 6299** or emailing helpdesk@iscp.ac.uk

Key terms

Commit: Enables the trainee to store a task s/he has completed in the portfolio without any actions required by other users e.g. uploading information about a course in *Other Evidence*

Retract: Enables the trainee to retrieve an item s/he has committed to the portfolio or submitted to another user who has validated it, in order to amend/delete it.

Send: Refers mainly to messages that you give to another person to view.

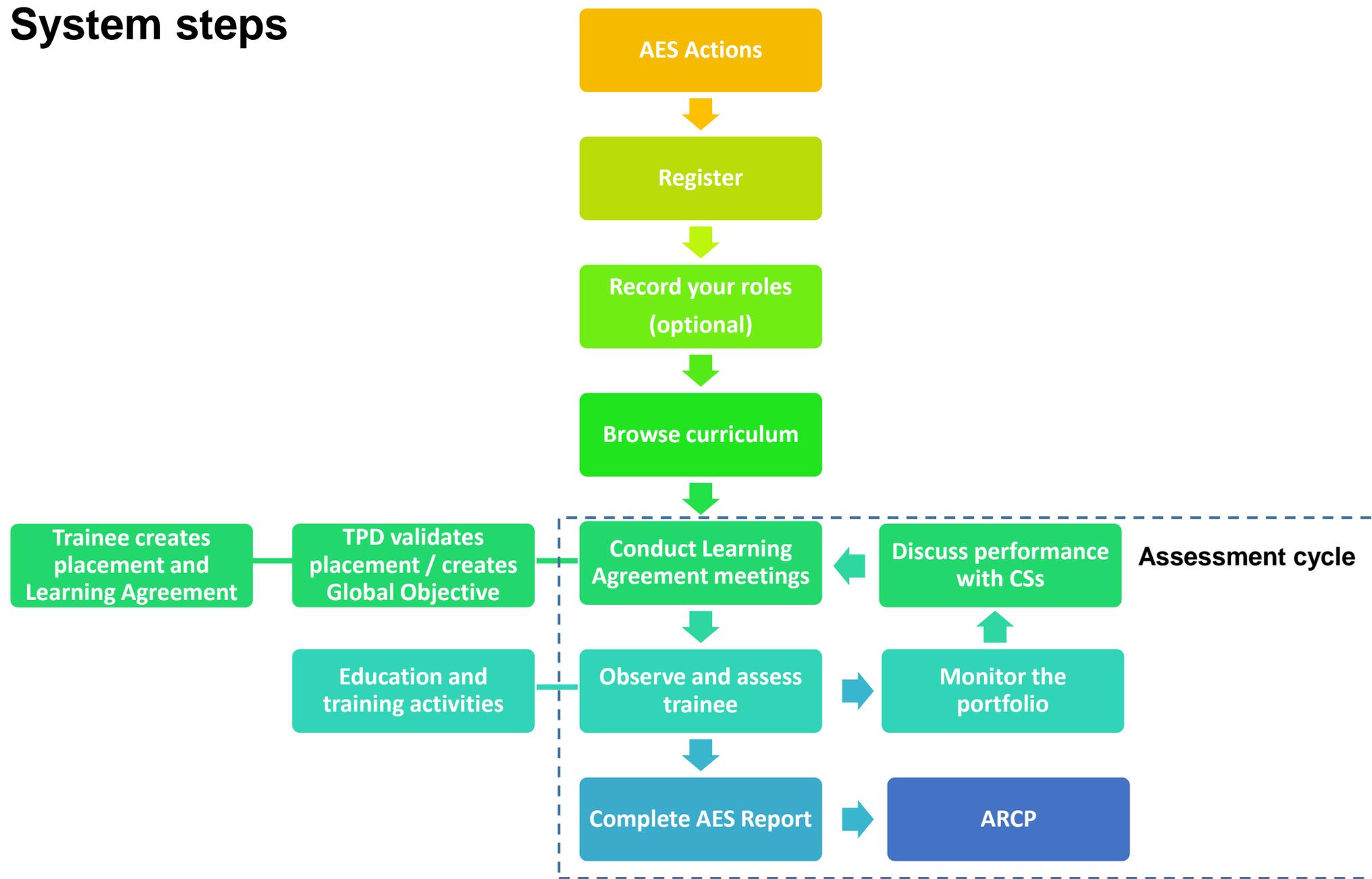
Save as draft: Enables you to save content and finish later.

Sign off: Indicates that you agree to content e.g. details in a Learning Agreement meeting.

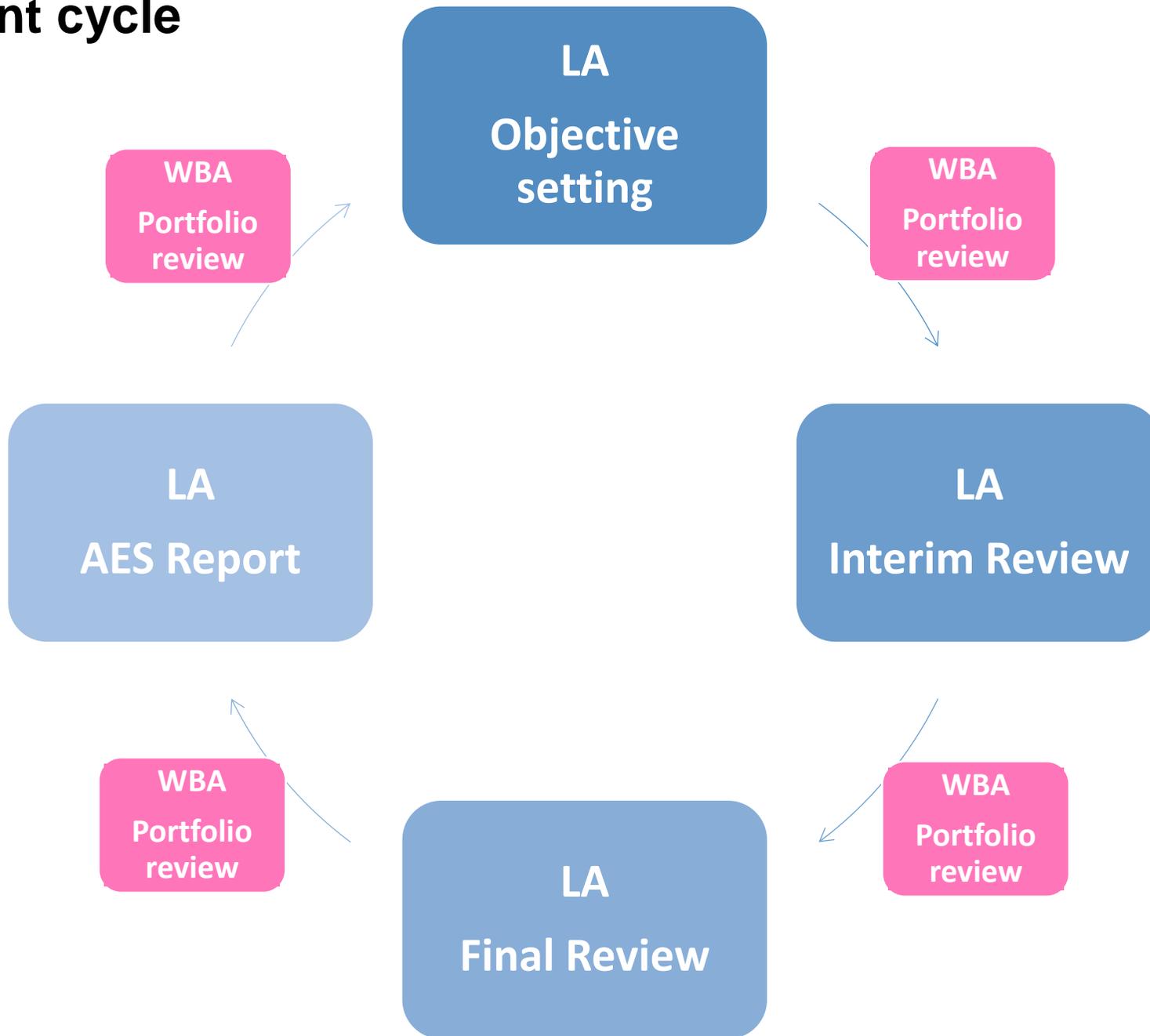
Submit: Enables you to send a completed task to another user for the next step in a process e.g. to a trainee for their comments in your AES Report

Validate: Enables you to confirm content is correct e.g. a WBA by a rater.

System steps



Assessment cycle



DASHBOARD

As Assigned Educational Supervisor (AES), you will have been identified by the trainee when s/he creates a placement and a Learning Agreement. The trainee also chooses at least one Clinical Supervisor (CS) and selects the relevant Training Programme Director (TPD).

Logging in takes you to your personalised *Dashboard*. Clicking on *Dashboard* in the main menu takes you back here from other areas.

The first time you login you will be asked to agree a new set of Terms and Conditions of the v10 website, you can click the link to read and accept them.

The menu also shows you numbers of items against areas awaiting attention such as new messages.

Your dashboard displays (1):

Alerts under the pink band for important tasks that require an action. Typically these may be assessments for your validation.

Notices under the blue band for information and may also require an action. Typically these may be new messages for you to read.

Warnings under a yellow band for alerts reaching their due time.

These will not disappear until you have taken the action.

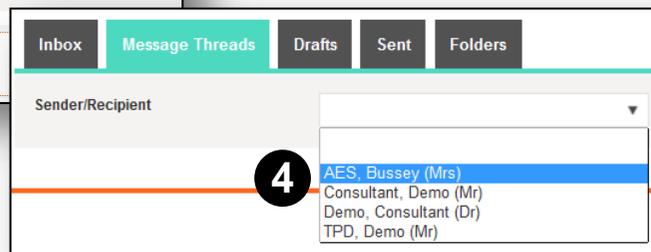
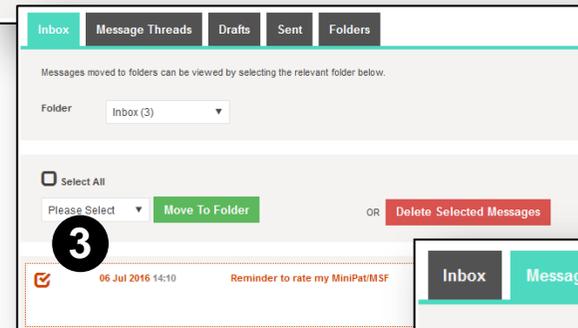
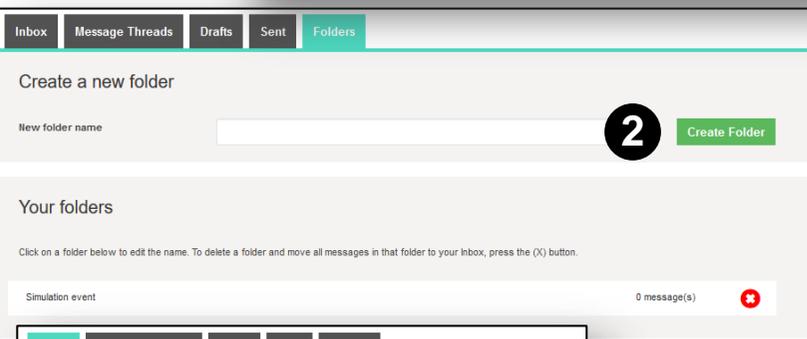
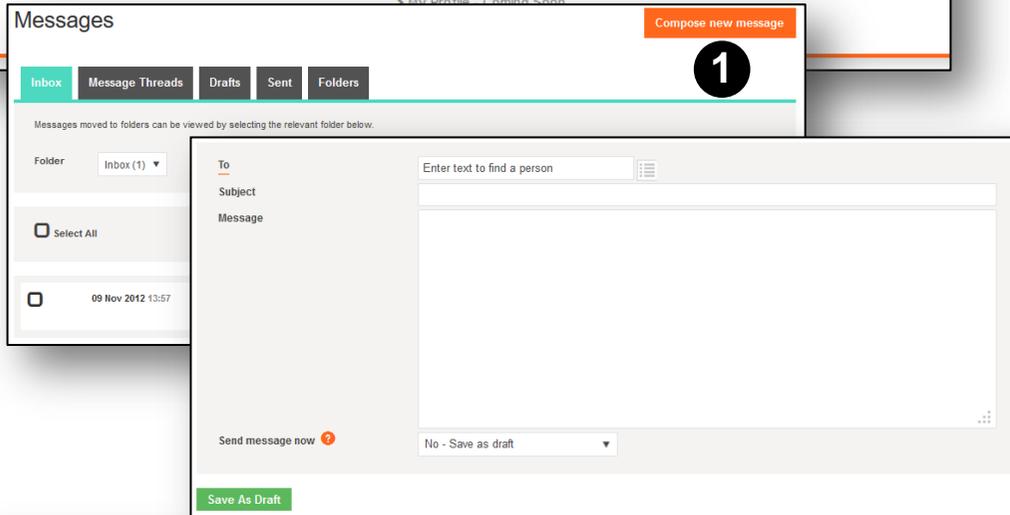
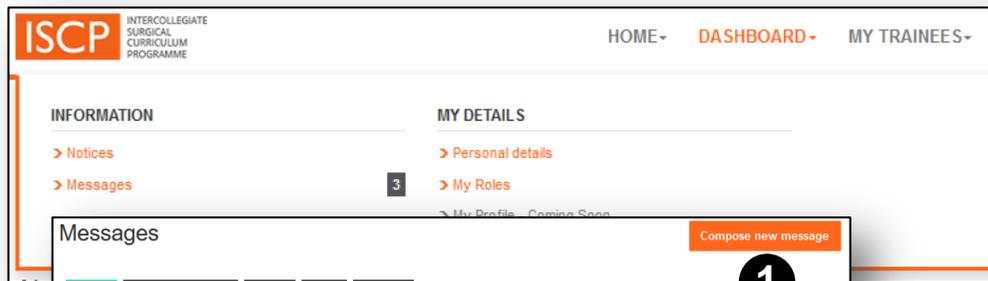
Other menu items are:

- *Dashboard - Personal details* – shows you the account details with which you registered.
- *Dashboard - My Roles* – lists your ISCP roles and any other key positions of responsibility you occupy that you wish to add.
- Note that in the main menu, *Trainer Area* is coming soon and is intended to enable the collection of evidence by trainers to help them demonstrate to the GMC that they are eligible to be recognised as trainers. Further announcements will follow.

The screenshot shows the top navigation bar of the ISCP website. The logo 'ISCP INTERCOLLEGIATE SURGICAL CURRICULUM PROGRAMME' is on the left. The navigation menu includes 'HOME-', 'DASHBOARD -', 'MY TRAINEES -', and 'TRAINER AREA -'. Below the menu, there are two columns: 'INFORMATION' with links for '> Notices' and '> Messages', and 'MY DETAILS' with links for '> Personal details', '> My Roles', and '> My Profile - Coming Soon'. A small pink box with the number '6' is visible next to the 'My Roles' link.

The screenshot shows the 'ISCP Terms and Conditions' page. At the top, there is a pink banner with the text 'Action required: Read and agree to the latest site terms and conditions.' and a link 'I Agree to the terms and conditions [X]'. The main content is titled 'ISCP Terms and Conditions' and is organized into sections: 1. General, 2. Information about us, and 3. Your use of this website and our intellectual property rights. Each section contains several numbered paragraphs of text.

The screenshot shows the 'Dashboard Alerts, Warnings and Notices' section. It starts with the heading 'Alerts, Warnings and Notices' and a question mark icon. Below it, it says 'There are currently no notices or alerts set on your account.' There are three colored bands: a pink band for 'You have critical alerts', a yellow band for 'You have warning alerts' with a large black circle containing the number '1', and a blue band for 'You have information alerts'. At the bottom, it says 'You have no alerts at this time!'.



DASHBOARD / MESSAGES

You can send, receive, save drafts, create folders and view conversations with a person.

Compose new message:

- Click in the orange button (1). In the *To* box, the system will search for people as you type or you can choose from your recently selected users.

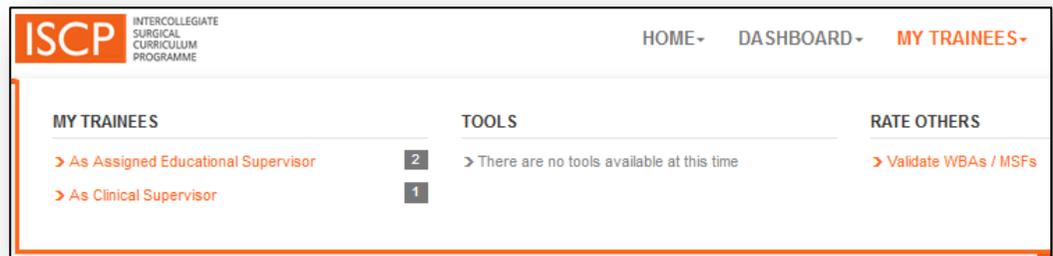
Folders: Enables you to file different messages under different headings.

- Name the folder and click *Create Folder* (2). The new folder name will appear below and show the number of messages filed. You can also delete folders here (including the messages filed inside).
- To file a message in a folder, go to the inbox, select the message(s) to file by clicking the tick box (3), select the folder name in the drop down box and click the green *Move To Folder* button. Note that you can also delete messages in this way. Moved messages no longer appear in the inbox.
- To see the messages in a folder, click the *Folder* drop down box in your inbox.

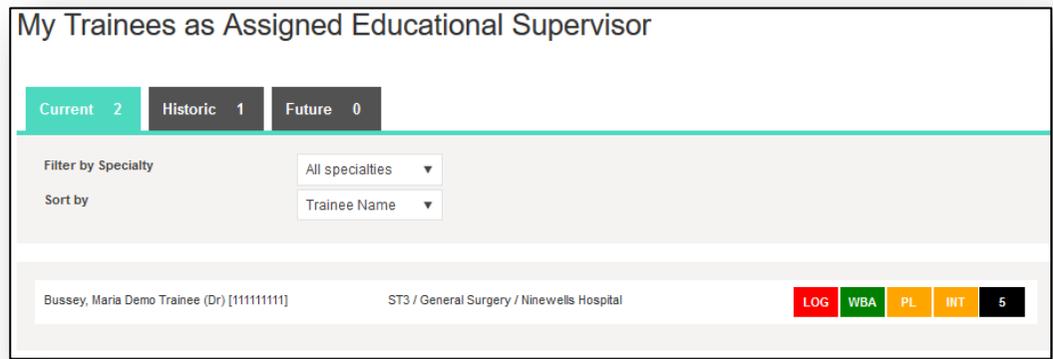
Message threads: (4) Allows you to filter a conversation with someone.

- Choose the person from the drop down box. You can also continue the email conversation from here.

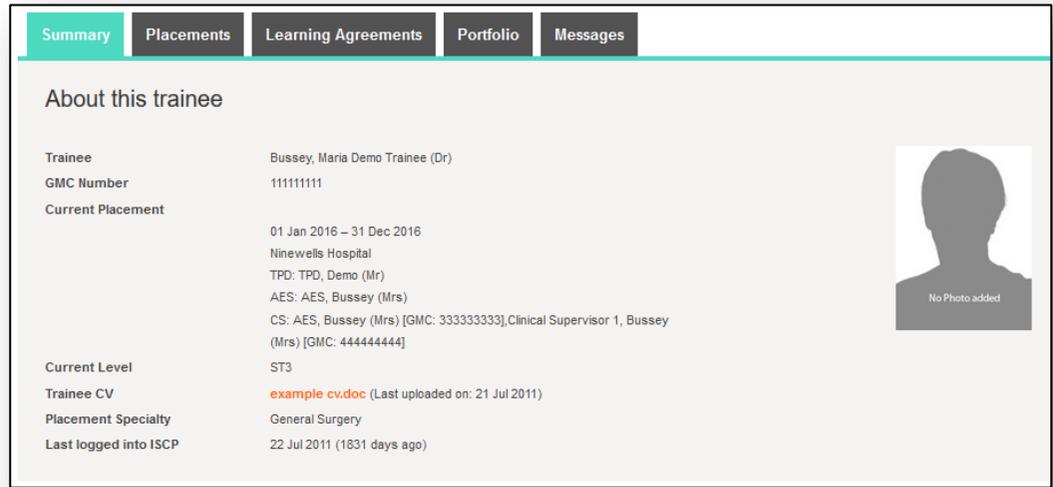
- *My Trainees* is the area that you will use most frequently as an AES. From here you can access all your trainees and carry out AES functions.
- In the menu next to your role is a number indicating the number of trainees you manage within that role.
- Click on *As Assigned Educational Supervisor*



- You can click on three tabs to see your trainees by a time period. Again, numbers indicate the number of trainees within that area.
- **Current** - trainees whose placements are in progress.
- **Historic** - trainees whose placements have expired within 12 months after which you will no longer be able to view them.
- **Future** - trainees you will be managing in the next 6 months.
- **Colour-coding** indicates the training status; last login (LOG), last WBA recorded, placement set up, Learning Agreement status and last ARCP outcome. Red indicates that an area requiring the trainee's attention.
- You can filter a long list of trainees by their specialty and name.
- Click on the area showing the trainee details.



- This leads you to a page summarising details about the trainee's training status. If the trainee has uploaded a CV you can view it by clicking on the orange link.
- By clicking on the tabs at the top of the page you can view their Placements, use the Learning Agreement, view the Portfolio and send this trainee messages.



- From the trainee summary page, click the *Placements* tab.
- All the trainee's placements are listed with the latest at the top, showing date range, hospital, training level, specialty, supervisors and whether TPD-validated.
- Click on a row showing these details (the area changes colour) to open the placement to see the full content.
- Click the back arrow key next to *Placement* to go back a step.

Summary Placements Learning Agreements Portfolio Messages

About this trainee

Trainee	Bussey, Maria Demo Trainee (Dr)	
GMC Number	111111111	
Current Placement	01 Jan 2016 – 31 Dec 2016 Ninewells Hospital TPD: TPD, Demo (Mr) AES: AES, Bussey (Mrs) CS: AES, Bussey (Mrs) [GMC: 333333333], Clinical Supervisor 1, Bussey (Mrs) [GMC: 444444444]	
Current Level	ST3	
Trainee C		

Summary Placements Learning Agreements Portfolio Messages

20 Jul 2016 – 31 Jul 2018	Aberdeen Royal Infirmary ST3 Neurosurgery	AES: Consultant, Demo (Mr) [GMC: 555-555-0199@example] TPD: TPD, Demo (Mr) [GMC: 123456]	Validated
01 Jan 2016 – 31 Dec 2016	Ninewells Hospital ST3 General Surgery	AES: AES, Bussey (Mrs) [GMC: 333333333] TPD: TPD, Demo (Mr) [GMC: 123456]	Submitted
		Demo, Consultant (Dr) [GMC: 1111112] Demo, PD (Mr) [GMC: 9991111]	Validated

← Placement

Your key training details

Please ensure the following details are correct before continuing. All mandatory fields are highlighted like this

Trainee	Bussey, Maria Demo Trainee (Dr) [GMC: 111111111]
Appointment type	Surgical ST3
Parent Specialty	Neurosurgery
Academic trainee?	ACF(Academic Clinical Fellow)
Military trainee?	No
Deanery/LETB	NHS Education for Scotland - East Region
TPD	TPD, Demo (Mr) [GMC: 123456]

Placement details

Hospital	Aberdeen Royal Infirmary (ABERDEEN)
Start date	20 Jul 2016
End date	31 Jul 2018
Full time trainee?	Yes
Specialty of placement	Neurosurgery
Level	ST3

Supervisors for this placement

AES	Consultant, Demo (Mr) [GMC: 555-555-0199@example]
CS	Demo-Consultant, Northern (Miss) [GMC: 1313131]

Placement created on 20 Jul 2016 by Bussey, Maria Demo Trainee (Dr) [GMC: 111111111] [u]
 Placement updated on 20 Jul 2016 by TPD, Demo (Mr) [GMC: 123456] [u]
 Placement validated on 20 Jul 2016 by TPD, Demo (Mr) [GMC: 123456] [u].

Summary	Placements	Learning Agreements	Portfolio	Messages
Your Placements and Learning Agreements				
20 Jul 2016 – Aberdeen Royal Infirmary (Current)		OBJ INT FIN REP		
01 Jan 2016 – Ninewells Hospital (Current)		OBJ INT FIN REP		
05 Aug 2015 – Northampton General Hospital		OBJ INT FIN REP		
17 Sep 2012 – Cumberland Infirmary		Learning Agreement not created		
01 May 2011 – Aberdeen Royal Infirmary		Learning Agreement not created		
01 Feb 2011 – Aberdeen Royal Infirmary		OBJ INT FIN		

Opening a Learning Agreement

- All the trainee's Learning Agreements are listed here, showing start date, hospital and LA stage.
- You can open the LA(s) for which you are or were AES. Any done by different AESs will be greyed out and not accessible.
- The LA stages or meetings and their status are shown in black boxes.

OBJ – objective setting

INT – Interim Review

FIN – Final Review

REP – AES Report

(NB: older versions of the LA do not have a REP stage as this was combined with the Final Review).

- Click on the area to open it.

Summary	Objective Setting	Interim Review	Final Review	AES Report	Comments
Trainee	Bussey, Maria Demo Trainee (Dr) [GMC: 111111111]				
Placement details	01 Jan 2016 – 31 Dec 2016 / Ninewells Hospital (DUNDEE) / General Surgery / ST3				
Trainers	TPD: TPD, Demo (Mr) [GMC: 123456] AES: AES, Bussey (Mrs) [GMC: 333333333] CS(s): AES, Bussey (Mrs) [GMC: 333333333], Clinical Supervisor 1, Bussey (Mrs) [GMC: 444444444]				

- Open each stage by clicking on the tab.

Each stage after Objective Setting becomes available only when the previous one has been signed off by both trainee and AES.

The Training Programme Director – through the Global Objective and Clinical Supervisor(s) - through the CS Report can also add to and view the Learning Agreement.

Summary Objective Setting Interim Review Final Review AES Report Comments

Trainee Bussey, Maria Demo Trainee (Dr) (GMC: 11111111)

Placement details 01 Jan 2016 – 31 Dec 2016 / Ninewells Hospital (DUNDEE) / General Surgery / ST3

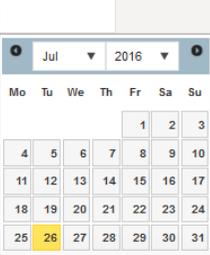
Trainers
 TPD: TPD, Demo (Mr) (GMC: 123456)
 AES: AES, Bussey (Mrs) (GMC: 333333333)
 C8(s): AES, Bussey (Mrs) (GMC: 333333333), Clinical Supervisor 1, Bussey (Mrs) (GMC: 444444444)

Global Objectives ?

Global Objective Global Objective not added by Training Programme Director

Objective setting date

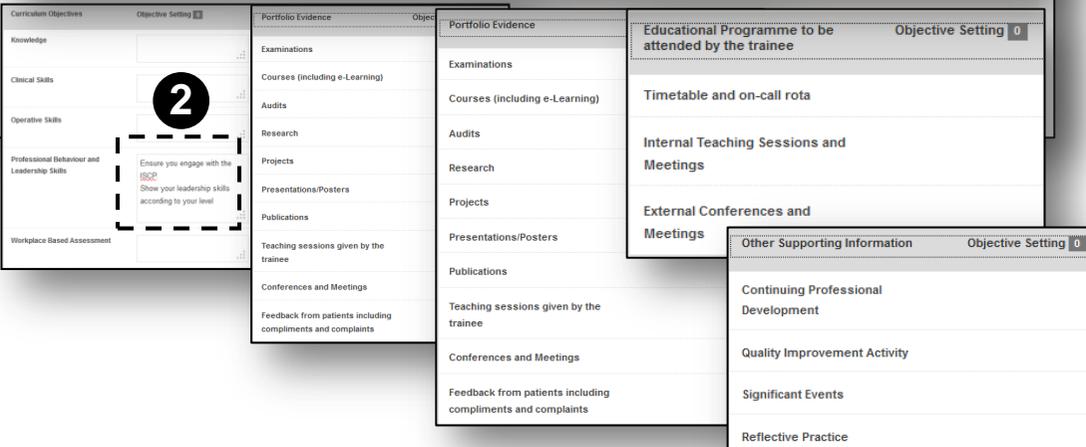
Date of meeting



Actions required to meet Learning Objectives ?

Below you can record actions that the trainee should be focusing on during this placement. Only complete areas which are appropriate for this placement. Numbers indicate areas which have been populated.

Curriculum Objectives	Objective Setting 0	Interim Review 0	Final Review 0	▼
Portfolio Evidence	Objective Setting 0	Interim Review 0	Final Review 0	▼
Educational Programme to be attended by the trainee	Objective Setting 0	Interim Review 0	Final Review 0	▼
Other Supporting Information	Objective Setting 0	Interim Review 0	Final Review 0	▼



Curriculum Objectives Objective Setting 0

Knowledge
Clinical Skills
Operative Skills
Professional Behaviour and Leadership Skills
Workplace Based Assessment

Portfolio Evidence Objective Setting 0

Examinations
Courses (including e-Learning)
Audits
Research
Projects
Presentations/Posters
Publications
Teaching sessions given by the trainee
Conferences and Meetings
Feedback from patients including compliments and complaints

Educational Programme to be attended by the trainee Objective Setting 0

Timetable and on-call rota
Internal Teaching Sessions and Meetings
External Conferences and Meetings

Other Supporting Information Objective Setting 0

Continuing Professional Development
Quality Improvement Activity
Significant Events
Reflective Practice

Objective setting

The top part of the objective setting meeting shows the placement details.

Next is the Training Programme Director's Global Objective statement which enables her/him to state overarching requirements for trainees by training level.

You or the trainee can complete the form as follows e.g. after the meeting:

- **Meeting date:** Enter the date of the Objective Setting meeting by clicking in the space and choosing from the calendar.
- **Actions required to meet Learning Objectives:** These areas open and close with down/up arrows (1). They are designed as prompts and only need to be filled in to help you record your discussion, your expectations for the placement and to look back on later. You do not need to add text in every box.
- When opened (2) you can type or paste in the text boxes and the box size increases as you type.

Comments

Trainee Comments

AES Comments

NOTE: Any comments saved in draft will be immediately viewable by the AES

Saving and signing off this meeting [Sign off](#)

No - Save as draft

[Save As Draft](#)Saving and signing off this meeting [Sign off](#)

Yes – I would like to sign off now

AES Password

1

By entering the AES's comments (optional) and password (compulsory) this meeting will be immediately signed off.
If no password is entered then an email will be sent to the AES with a link to sign off the meeting.

[Sign Off](#)

Trainee: Signed off by Bussey, Maria Demo Trainee (Dr) [GMC: 111111111] on 22 Jul 2016

AES: Signed off by AES, Bussey (Mrs) [GMC: 333333333] [u] on 22 Jul 2016

Objective setting cont.

- **Comments:** Both trainee and AES have a separate area to add individual comments.
- **Save:** You can *Save as draft* to come back to later.
- **Sign off:** Both trainee and AES need to sign off the meeting and can do this in either account. If signing off individually, the trainee is first. That triggers an email to you to sign off your part.
- **Dual sign off:** You can sign off together (1) by adding your ISCP password and clicking *Sign Off*.

This can be done at any time, even after the trainee has signed off.

When signed off, the meeting becomes read only and you can then access the next stage; the *Interim Review* meeting.

Interim Review

The interim meeting should occur at about the mid-point of the placement to check that progress is in line with your initial objectives and agree further actions.

- **Date:** Click in the space to use the date selector.
- Click the down arrow to open the *Topics and Progress* section to see the syllabuses to which the trainee has specifically linked evidence.
- Click on the number to see a list of the evidence in a new window (1). Click again on the down arrow to open a piece of evidence.
- **Award outcomes** against syllabus topics (in your account only) (2). Outcomes can be: *Grey – not started; Yellow – in progress; Green – Satisfactory and Red - Unsatisfactory.*

An outcome of *Satisfactory* indicates that the trainee has achieved the level of performance that is satisfactory for her/his level (year) of training. You can also award outcomes in the final meeting and directly into the trainee's portfolio.

- **Actions required to meet Learning Objectives:** You can see the text you added in the Objective Setting stage to enable you to look back on progress and now a second column of boxes enables you to update each area (3). Type within any of the boxes and the box size increases as you type.
- **Comments:** This section asks an additional mandatory question about whether there have been any unresolved causes of concern. Use the down arrow to answer. A *Yes* provides a text box for you to give a brief description and must be filled in (1).
- **Sign off** as before.

Interim review date

Date of meeting

Topics and Progress +

Syllabus and Stage Outcomes recorded by AES

Syllabus (date) >> Stage ▼

Syllabus (date) >> Stage ▼

22 out of 30 topics within this stage either have evidence or an outcome recorded.
 Click here to show all topics within this stage of training.

↓ Hover over or click the outcome to view the full previous outcomes

Outcome	Topic	WBAs	Evidence
<input type="checkbox"/>		1	0
<input type="checkbox"/>		1	0
<input type="checkbox"/>		1	0

Set an outcome for this placement

Satisfactory

Actions required to meet Learning Objectives +

Below you can record actions that the trainee should be focusing on during this placement. Only complete areas which are appropriate for this placement indicate areas which have been populated.

Curriculum Objectives	Objective Setting	Interim Review	Final Review
Knowledge	Books and journals	<input type="text"/>	
Clinical Skills	Clinics to attend	<input type="text"/>	
Operative Skills	Theatre lists Procedures	<input type="text"/>	
Professional Behaviour and Leadership Skills	Communication skills - patients and colleagues	<input type="text"/>	
Workplace Based Assessment	CEX, CBD, DOPS, MSF	<input type="text"/>	

Comments

Are there any known current unresolved causes of concern (e.g. Serious Untoward Incident, Significant Event or Complaint)?

Unresolved causes of concern comments

Yes

Please select
 No
 Yes

Final Review

The final review occurs towards the end of the placement to enable you and your trainee to review progress against your objectives and the evidence in the portfolio.

- **CS Report:** This meeting has the additional mandatory requirement for a Clinical Supervisor's report – you cannot sign off without at least one (1). The CS(s) whom the trainee designated when s/he set up the placement (in addition to yourself if you are also their CS) can provide a CS report through their own account.
- **Actions** text boxes: You will be able to see the text you added in the previous meetings and have a third column of boxes (3) to update each area before the AES's report.
- **Award outcomes** against topics as for the Interim Review (2).
- **Comment:** As for the other meetings.
- **Sign off:** As for the other meetings.

1 No Clinical Supervisor Reports have been added at this time. Comments are required before this meeting can be completed.

2 Set an outcome for this placement

Outcome	Topic	WBAs	Evidence
		1	0
		1	0
		1	0

3 Actions required to meet Learning Objectives

Curriculum Objectives	Objective Setting	Interim Review	Final Review
Portfolio Evidence	Objective Setting	Interim Review	Final Review
Educational Programme to be attended by the trainee	Objective Setting	Interim Review	Final Review
Other Supporting Information	Objective Setting	Interim Review	Final Review
Continuing Professional Development			
Quality Improvement Activity			
Significant Events			
Reflective Practice			

Final Comments

Are there any known current unresolved causes of concern (e.g. Serious Untoward Incident, Significant Event or Complaint)?

Trainee Comments

AES Comments

NOTE: Any comments saved in draft will be immediately deleted.

Saving and Signing Off this Meeting

Sign off: No - Save as draft

The sign off option will be available once a CS report has been submitted.

Save As Draft

AES Report

The final stage of the Learning Agreement is the AES Report which is the key component for the ARCP panel. It summarises the information from the previous stages. This can only be completed from your account.

You will receive an alert in your dashboard (1).

The report displays:

- CS reports.
- Topics linked to evidence and any outcomes you awarded. You can set outcomes from here by clicking the down arrow (2).
- Actions set – the text added in text boxes in previous meetings.

Add the following:

- Report date, click in the space to select a calendar date (3).
- Set any outcomes (see 2).
- Add your overall statement (4).
- Add any details about any Serious Untoward Events/Investigations and if resolved (5).
- LA Outcome – one of three statements (6):

1. No further action required, trainee should progress to the next placement/stage.
2. Trainee needs further development or targeted training but should proceed to the next placement/stage.
3. Trainee needs further development or targeted training before progression to the next placement/stage.

- Sign off (this can be done with the trainee, otherwise the trainee will be able to view and sign off separately).

Alerts, Warnings and Notices 2

Alert(s)

1

You have 8 WBA(s) to validate

You have an AES Report to sign for Bussey, Maria Demo Trainee

Summary Objective Setting Interim Review Final Review **AES Report** Comments

Trainee Bussey, Maria Demo Trainee (Dr) [GMC: 111111111]

Placement details 20 Jul 2016 – 31 Jul 2018 / Aberdeen Royal Infirmary (ABERDEEN) / Neurosurgery / ST3

Trainers TPD: TPD, Demo (Mr) [GMC: 123456]
AES: Demo, Consultant (Dr) [GMC: 11111112]
CS(s): Demo-Consultant, Northern (Miss) [GMC: 1313131], Consultant, Demo (Mr) [GMC: 555-555-0199@example]

AES Report date

Date of report **3**

Comments from the Clinical Supervisor(s) about this trainee

20 Jul 2016 Written by Demo-Consultant, Northern (Miss) [1313131] testy mc test

Topics and Progress +

Set outcomes for applicable topics.

Syllabus and Stage Outcomes recorded by AES

Cardiothoracic Surgery (2015) » Professional/Leadership Skills **2**

Actions set during the Objective Setting meeting

Curriculum Objectives Objective Setting

Portfolio Evidence Objective Setting

Educational Programme to be attended by the trainee Objective Setting

Other Supporting Information Objective Setting

AES Overall Summary Statement and Recommendation

Please make a statement about the trainee's overall performance including strengths and areas for development. Please include any recommendations relevant to the next placement/stage

AES Comments

Has this trainee been involved in any Serious Untoward Incident, Significant Event Investigation or been named in any Complaint? **5**

Please select

Please mark one of the following statements as applicable

Please Select

4

Saving and Signing Off this Meeting +

Sign off Yes – I would like to sign off now

Trainee Password

Trainee Comments

By entering the Trainee's comments (optional) and password (compulsory) this meeting will be immediately signed off

I have read and agree with my Learning Agreement and my Assigned Educational Supervisor's comments

Please select **6**

Sign Off

Set an outcome for this placement

Satisfactory

Filtering views

Evidence of the trainee's learning appears in the trainee's portfolio. Different areas of the portfolio can be viewed through a series of filters.

Go to the trainee's summary page and choose the placement tab by clicking; *My Trainees / As Assigned Educational Supervisor / Current* tab / Click on the relevant trainee / Click the *Portfolio* tab.

You will see a series of filters.

In **Viewing** – Use the drop down box to select what you want to view, areas include (1):

- ARCPs
- Global Objectives
- Learning Agreements
- Topics and Progress
- Evidence (by WBA method)
- Evidence / Other Evidence
- eLogbook
- Journals
- PDPs
- Rotas

Use the **Custom Date Range** – Click the checkbox and select a custom *from* and *to* period (2).

OR

Select a **Time period** – Click the drop down box to choose a pre-established period by *placement*, *level*, *ARCP* or *Everything* (default) (3).

Your selections determine the evidence that is displayed in the area below.

The screenshot displays the 'About this trainee' page for Bussey, Maria Demo Trainee (Dr). The page includes a navigation bar with tabs for Summary, Placements, Learning Agreements, Portfolio, and Messages. The 'About this trainee' section lists the following details:

- Trainee: Bussey, Maria Demo Trainee (Dr)
- GMC Number: 111111111
- Current Placement: 01 Jan 2016 – 31 Dec 2016, Ninewells Hospital, TPD: TPD, Demo (Mr), AES: AES, Bussey (Mrs), CS: AES, Bussey (Mrs) [GMC: 333333333], Clinical Supervisor (Mrs) [GMC: 444444444]
- Current Level: ST3
- Trainee CV: example cv.doc (Last uploaded on: 21 Jul 2011)
- Placement Specialty: General Surgery
- Last logged into ISCP: 22 Jul 2011 (1831 days ago)

The 'Viewing' section shows a dropdown menu for 'Topics and Progress' (1), a checkbox for 'Use Custom Date Range' (2), and a 'Time period' dropdown menu (3). The 'Time period' dropdown menu lists various options including ARCP, Placement, Level, and Everything.

The tools you may frequently view are Topics and Progress, Evidence and eLogbook:

View Topics and Progress

- The syllabuses listed (1) are those with topics against which the trainee has specifically linked evidence during the time period selected. Click the down arrow to see the topics and evidence.
- Under each syllabus the topics and evidence are displayed. The number shows the number of items to view. Click on the number to see a list of the evidence in a new window and again on the down arrow to open up each piece of evidence (2).
- For each syllabus the default view is the topics against which there is evidence (3). The printed header shows the number of topics with evidence against the total number of topics. By ticking in the checkbox you can see all topics in that syllabus whether with or without evidence against them (3).
- You can award outcomes in the left hand box (4). *Grey – not started; Yellow – in progress; Green – Satisfactory and Red - Unsatisfactory.*

Syllabus and Stage

Outcomes recorded by AES

Cardiothoracic Surgery (2015) » Professional/Leadership Skills

Core Surgical Training (2013) » Professional/ Leadership Skills

Core Surgical Training (2010) » Core Surgical Training Modules

11 out of 25 topics within this stage either have evidence or an outcome recorded.

Click here to show all topics within this stage of training.

Hover over or click the outcome to view its history. To edit outcomes, select a placement from the time period where you are recorded as the AES.

Outcome	Generic Module 1 > Basic sciences	WBAs	Evidence
<input checked="" type="checkbox"/>	Applied anatomy	0	1

Examinations 1 record(s)

28 Feb 2011 MRCS Part A

Date 28 Feb 2011

Title and section passed MRCS Part A

Awarding body Royal College of Surgeons of England

Topics Selected

- Core Surgical Training (2010) » Core Surgical Training Modules
 - Generic Module 1 » Basic sciences
 - Applied anatomy
 - Imaging
 - Microbiology
 - Pathology
 - Pharmacology
 - Physiology

4

Set an outcome for this placement

Satisfactory

View Evidence

- Choose the evidence type from the *Viewing* list (1).
- Select a Custom or Specified time period (2).

The first area on the page (3) displays:

- The number of assessments done in the selected period.
- The number of assessments that were carried out and validated by a Consultant rater.
- The average time taken for validation by all raters (ideally this should be less than 28 days).
- A visual of the global ratings of each assessment and you can scroll along the timeline.

The second area on the page (4) displays a list of the assessments showing their date, rater and global rating.

- Use the drop down arrows to open each assessment (5).

Note that the trainee can retract a piece of evidence if they subsequently wish to amend it. If it has already been validated, you will receive a system message letting you know that it is being retracted.

The screenshot shows the 'Viewing' interface with the following components:

- Navigation:** Summary, Placements, Learning Agreements, **Portfolio**, Messages.
- Viewing Section:**
 - Evidence Type:** A dropdown menu (1) with options: AoA, **CBD**, CEX, CEX for Consent, DOPS, MSF, OoT, PBA, Other Evidence.
 - Time period:** A date range selector (2) showing '01 Feb 2011 - 22 Jul 2016 : At any ti...'. A 'Use Custom Date Range' checkbox is also present.
- Summary Section:**
 - 74 CBD(s) were recorded in this period
 - 66 validated by a Consultant
 - Average time taken from the assessment date to the assessment being validated: 83 day(s)
 - A bar chart (3) showing performance levels (4, 3, 4, 3, 3, 3, 3, 3, 3, 3, 3, 3, 3, 3, 3, 3, 3, 3, 3, 3, 4, 3) in reverse date order.
- Assessment List (4):**

Date	Evidence Type	Rater	Global Rating
20 Jul 2016	CBD	Demo, Consultant (Dr) [GMC: 1111112]	Level 4
01 Feb 2011	CBD	Demo, Consultant (Dr) [GMC: 1111112]	Level 4
- Assessment Details (5):**
 - Header:** 20 Jul 2016, CBD, Demo, Consultant (Dr) [GMC: 1111112], Level 4
 - Location:** Aberdeen Royal Infirmary
 - Development needs:** Development needs
 - Recommended actions:** Recommended actions
 - Is this a reflective CBD?** No
 - Clinical Setting:** A&E
 - Emergency / Elective:** Emergency
 - Performed in a simulated setting:** No
 - Complexity of the case:** 1. Appropriate for early years training
 - Summary of the problem:** accident bad leg
 - Focus of clinical encounter:** Medical record keeping, Clinical assessment, Professionalism
 - Ratings:** C1: 3, C2: 3, C3: 3, C4: 3
 - Global summary:** Level 0: Below that expected for early years training
 - CBD Details:** Bussey, Maria Demo Trainee (Dr) [GMC: 111111111] (Trainee) created on 20 Jul 2016; Bussey, Maria Demo Trainee (Dr) [GMC: 111111111] (Trainee) submitted on 20 Jul 2016; Demo, Consultant (Dr) [GMC: 1111112] (Rater) validated on 20 Jul 2016
 - Topics Selected:**
 - Cardiothoracic Surgery (2015) » Professional/Leadership Skills
 - Being a good communicator
 - Communication with colleagues
 - Communication with patients
 - Good Clinical Care
 - Good Clinical Care
 - Keeping up to date
 - Keeping up to date and understanding how to analyse information
 - Probity and Ethics
 - Probity and Ethics
 - Retract:** A red button at the bottom left.

ISCP INTERCOLLEGIATE SURGICAL CURRICULUM PROGRAMME

HOME - DASHBOARD - MY TRAINEES -

Case Based Discussion (CBD)

RATE OTHERS
> Validate WBAs / MSFs

About the assessment

Trainee: Demo2, LA (Mr) [GMC: 6665555] [u]

Assessment date: 17 May 2013

Rater: AES, Bussey (Mrs) [GMC: 33333333] [u]

Is this a reflective CBD? No

Hospital: Ryhope General Hospital (SUNDERLAND)

Rater feedback

Verbal and written feedback is a mandatory component of this assessment. Please use this space to record areas of strength and suggestions for development which were highlighted during discussion with the trainee.

General

Strengths

Development needs

Recommended actions

Ratings

Your ratings should be judged against the standard laid out in the syllabus for the trainee's stage of training.

1. Medical record keeping	Outstanding	N	D	S	O
2. Clinical assessment	Outstanding	N	D	S	O
3. Diagnostic skills and underlying knowledge base	Satisfactory	N	D	S	O
4. Management and follow-up planning	Satisfactory	N	D	S	O
5. Clinical judgement and decision making	Development required	N	D	S	O
6. Communication and team working skills	Development required	N	D	S	O
7. Leadership skills	Development required	N	D	S	O
8. Reflective practice/writing	Satisfactory	N	D	S	O
9. Professionalism	Satisfactory	N	D	S	O

Global summary

Please select

Level 0: Below that expected for early years training

Level 1: Appropriate for early years training

Level 2: Appropriate for completion of early years training or early speciality training

Level 3: Appropriate for central period of speciality training

Level 4: Appropriate for Certification

Saving and validating this assessment

Validate this CBD

Yes - I will validate this WBA now

No - I will validate this WBA later

Yes - I will validate this WBA now

Validate Now

Reject

WORKPLACE ASSESSMENT (WBA) 2/2

You should complete the following fields:

Rater feedback (1) – your written comments are the most important component and are, therefore, mandatory in at least one text box.

Ratings (2) – the trainee is normally assessed against the stage of training (except in PBAs). Click the relevant square for: *N = Not assessed/observed / D = Development required / S = Satisfactory / O = Outstanding.*

Global summary (3) – the overall rating is selected from four levels that map to the trainee's stage of training. Early in the training stage the trainee may be at or below the level for the stage, towards the middle and end they may be at their level or above. For example, a core trainee may achieve level 2 in most areas by the middle or end of CT2.

Sign off (4) Note that you can sign off here or at the same time as the trainee. The trainee can retract a WBA to amend it. If it's been validated you will be notified of a retraction via your dashboard.

The MSF is created by the trainee. The trainee conducts a self-assessment and chooses raters from a range of grades, one of whom must be her/his current AES:

- AES
- 2 Consultants
- 2 Senior nurses
- 2 Other doctors
- 2 Other healthcare professionals

To rate the trainee as AES, click *My Trainees* from the main menu then under *Rate Others*, select *Validate WBAs / MSFs*. You will also see an alert/link on your dashboard.

The form includes links to guidance notes (1).

- Complete the ratings (2).
- Provide written comments, these are the most important component of formative assessment (3).
- Provide details of any concerns (4).
- Tick the environments in which you observed the trainee (5).
- Tick the environments in which you observed the trainee (5).
- State whether you have read the guidance notes (this is a recommended step before you complete the form) (6).
- You can save as draft to come back to later.
- Sign off (7).

The screenshot shows the 'Multi-Source Feedback (MSF)' form interface. At the top, there is a navigation bar with 'HOME - DASHBOARD - MY TRAINEES -' and a 'RATE OTHERS' button with a link to '> Validate WBAs / MSFs'. The main form is titled 'Multi-Source Feedback (MSF)' and includes an 'About the MSF' section with trainee details: 'Trainee: Bussey, Marie Demo Trainee', 'Start Date: 28 Jul 2016', and 'Level: CT1'. Below this is a 'FEEDBACK' section with a link to 'MSF Guidance (please read this first)' (1). The 'Ratings' section (2) contains five categories: 'Clinical Care', 'Maintaining good medical practice', 'Learning and teaching', 'Relationships with patients and colleagues', and 'Other Information'. Each category has a list of skills with 'N', 'D', 'S', and 'O' buttons for rating. The 'Other Information' section (3) has two text areas for comments and a 'Please select' dropdown (4) for 'Environment observed'. The dropdown options are: Primary care, ASE / Admissions, Critical care, MOT, Clinico / Outpatients, Theatre, Ward, Community, Specialist practice, and Other. A 'Please select' dropdown (6) is also present. At the bottom, the 'Saving this Assessment' section (7) has a 'Submit this' dropdown set to 'No - Save as draft' and a green 'Save' button.

Multi-Source Feedback (MSF)

About the MSF

Trainee: Bussey, Maria Demo Trainee
MSF Date: 13 Jul 2016
Level: CT1

Consolidated Ratings

Clinical Care	Self Rating	Other Rater Rating
1. History taking and examination skills	Satisfactory	2 6
2. Relevant knowledge and diagnostic skills	Outstanding	7 1
3. Ability to formulate appropriate management plans	Satisfactory	1 7
4. Procedural (technical) skills	Outstanding	8
5. Record keeping (timely, accurate, legible)	Outstanding	2 5
Maintaining good medical practice		
6. Ability to manage time and work under pressure	Outstanding	7 1
7. Decision making and implementation skills	Satisfactory	1 7
8. Awareness of own limitations (willing to ask for help)	Outstanding	2 4
9. Initiative and leadership skills	Satisfactory	2 5
10. Focus on patient safety (clinical governance)	Outstanding	8
Learning and teaching		

AES Comments

Overall Outcome

Outcome: **Development Required**

Sign off this Assessment

Sign off this MSF: No - Save as draft

MSF Rater's Rating Score

Rater	Type	Rating
Trainee, Bussey (Mrs) [GMC: 222222222]	Trainee	Outstanding
AES, Bussey (Mrs) [GMC: 333333333]	AES	Satisfactory
Clinical Supervisor 1, Bussey (Mrs) [GMC: 444444444]	Consultant	Development required
Bianco, Jose (Dr) [GMC: 6122748]	Senior Nurse	Development required
Bussey, Trainee (Mrs) [GMC: 111111111]	Other Doctor	Satisfactory
Bussey, PD (Mrs) [GMC: 222222222]	Other Doctor	Satisfactory

Raters

Rater	Type	Responded?
Bussey, Maria Demo Trainee	Trainee	Yes
AES, Bussey	AES	Yes
Bussey, PD	Consultant	Yes
Bussey, Trainee	Senior Nurse	Yes
Demo, North/Western, Nurse	Senior Nurse	Yes
Clinical Supervisor 1, Bussey	Other Doctor	Yes
Trainee, Bussey	Other Doctor	Yes
demo, M	Health Care Professional	Yes
Demo, Dental PD	Health Care Professional	Yes

Anything especially good?

- Very good & dealing with conflict, own and others' (AES, Bussey)
- Very good (Demo, North/Western, Nurse)
- Very good with patients (Clinical Supervisor 1, Bussey)
- Good speaker (Trainee, Bussey)
- All good (demo, M)

Behaviours that have raised concerns or focus for development

- Would be useful if used more open questions (AES, Bussey)
- NA (Demo, North/Western, Nurse)
- Needs more patient with prior colleagues (Clinical Supervisor 1, Bussey)
- Needs to question better (Trainee, Bussey)
- NA (demo, M)

Click *My Trainees* from the main menu then under *Rate Others*, select *Validate WBAs / MSFs*. You will also see an alert/link on your dashboard.

The trainee will be able to submit the full MSF to you only when s/he has received the required number and type of evaluations.

You will receive the MSF in the format of the trainee's personalised consolidated feedback chart.

The first part shows the trainee's self-rating compared with her/his ratings. As AES you can open details about the raters.

- Click on the raters area for any competency to see more detail (1). This is level of detail is not available for the trainee.

The second part shows a list of the nominated raters and anonymised feedback (2).

It would be normal for the AES to meet with the trainee to present the feedback and discuss the results and you may wish to prepare for this in advance.

You can award one overall outcome (3) from three choices:

- Development required
- Satisfactory
- Outstanding

Once you have provided an overall outcome and signed off (4), your MSF will appear in the trainee's portfolio.