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

AES Actions

Register

Record your roles (optional)

Browse curriculum

Conduct Learning Agreement meetings

Observe and assess trainee

Complete AES Report

Assessment cycle

Trainee creates placement and Learning Agreement

TPD validates placement / creates Global Objective

Education and training activities

Discuss performance with CSs

Monitor the portfolio

ARCP
Assessment cycle

- Objective setting
  - WBA Portfolio review

- AES Report
  - WBA Portfolio review

- Final Review
  - WBA Portfolio review

- Interim Review
  - WBA Portfolio review
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.
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

- 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.
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.

- 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.
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.
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.
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.
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.)
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 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.*
VIEWING THE PORTFOLIO 3/4

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.
View eLogbook

- Choose eLogbook from the Viewing list (1).
- Select a Custom time period (2).

**OR**

- A specified time period (3).

The report shows the procedures recorded by the trainee in each specialty with numbers at different supervision levels. Those under $E$ for emergency are coloured red.

Use the scroll button at the side to move up and down the page.
Trainees are expected to take ownership of their training, including ensuring enough assessments are carried out. However, trainers also have a responsibility to engage with trainees in completing their WBAs.

The trainee is responsible for creating the WBA after the event and the rater is responsible for validating it; ideally this should be done within 28 days of the event.

As a rater, you will be alerted to WBAs submitted to you for validation by an alert in your dashboard. You can also find them from the menu. Click My Trainees then, under Rate Others, click Validate WBAs / MSFs.

The trainee may have already populated many of the fields. **The trainee should complete the following fields:**

- Date of the assessment, rater’s name and the hospital in which the assessment was done (1).
- Trainee feedback and trainee reflections – optional (2).
- Details of the event (3).
- Topics - syllabus topics against which the assessment provides evidence (4).
- Trainee sign off (5).
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: \( N = \text{Not assessed/observed} \) / \( D = \text{Development required} \) / \( S = \text{Satisfactory} \) / \( O = \text{Outstanding} \).

**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).
- 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).
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.