

# Creating and viewing goals

33 Steps

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Created by

WDAT

Creation Date

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Last Updated

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## STEP 1

### From your dashboard click on Create

You can also click the + button in the top righthand corner of your screen

The screenshot shows the RCR e-portfolio dashboard for a user named Jake Neale (training account only). The dashboard is divided into several sections:

- Profile:** Shows the user's name, specialty (Clinical Radiology), and educational supervisor (Amy Marks).
- Inbox:** Contains a welcome message and a 'Go to my inbox' button.
- Create a new event:** A button labeled 'Create' is highlighted with a red box.
- Learning resources and upcoming courses:** A section titled 'Royal Marsden Interesting Cases teaching group' with a brief description.
- Assessment goals:** A table showing progress on various goals. The table has a 'PERIOD' dropdown set to 'ST1' and a 'Refresh' icon.

| Goal                 | Progress |
|----------------------|----------|
| FRCR 1 - Anatomy     | 0%       |
| FRCR 1 - Physics     | 0%       |
| Mini-IPX             | 0%       |
| Rad-DOPS             | 0%       |
| MSF                  | 0%       |
| Teaching Observation | 0%       |
| QIPAT                | 0%       |

## STEP 2

Select the appropriate goal set from the goals section of the create menu

The screenshot shows the RCR Goals menu with the following items:

- Assessment and evidence
  - Mini Imaging Interpretation Exercise (Mini-IPX)
  - MSF
  - Multi-disciplinary team meeting assessment (MDTA)
  - Quality Improvement Project/Audit Assessment Tool (QIPAT)
  - Rad-DOPS
  - Supporting Evidence
  - Teaching Observation
- Reflection
- Reflection
- Goals
  - Curriculum goals – Clinical radiology curriculum procedures and milestones
  - Custom goals
  - ST1 assessment goals – Clinical radiology
  - ST2 assessment goals – Clinical radiology
  - ST3 assessment goals – Clinical radiology
  - ST4 assessment goals – Clinical radiology
  - ST5 assessment goals – Clinical radiology

## STEP 3

Enter the start and end dates for the goal period

The screenshot shows the 'New ST3 assessment goals – Clinical radiology' form. The 'Date occurred on' and 'End date' fields are highlighted with a red border.

Fields marked with ★ are required.

LAST SAVED: UNSAVED

ⓘ This event will be added onto your timeline as a SHARED event. Only users with permissions to view this event on your timeline will be able to view this event.

Date occurred on ★ 7/6/2023  
Please indicate the date on which this event occurred.

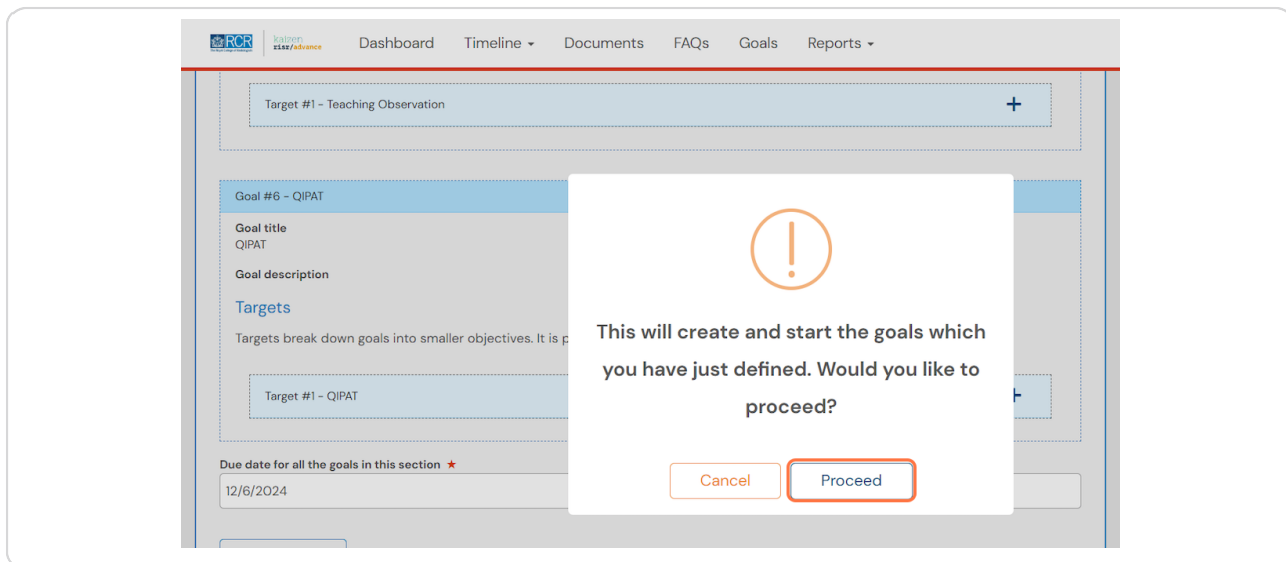
End date ★ 7/6/2023  
If this event spans multiple days, please indicate the date on which this finishes.

Description (optional)



## STEP 7

### Click on Proceed



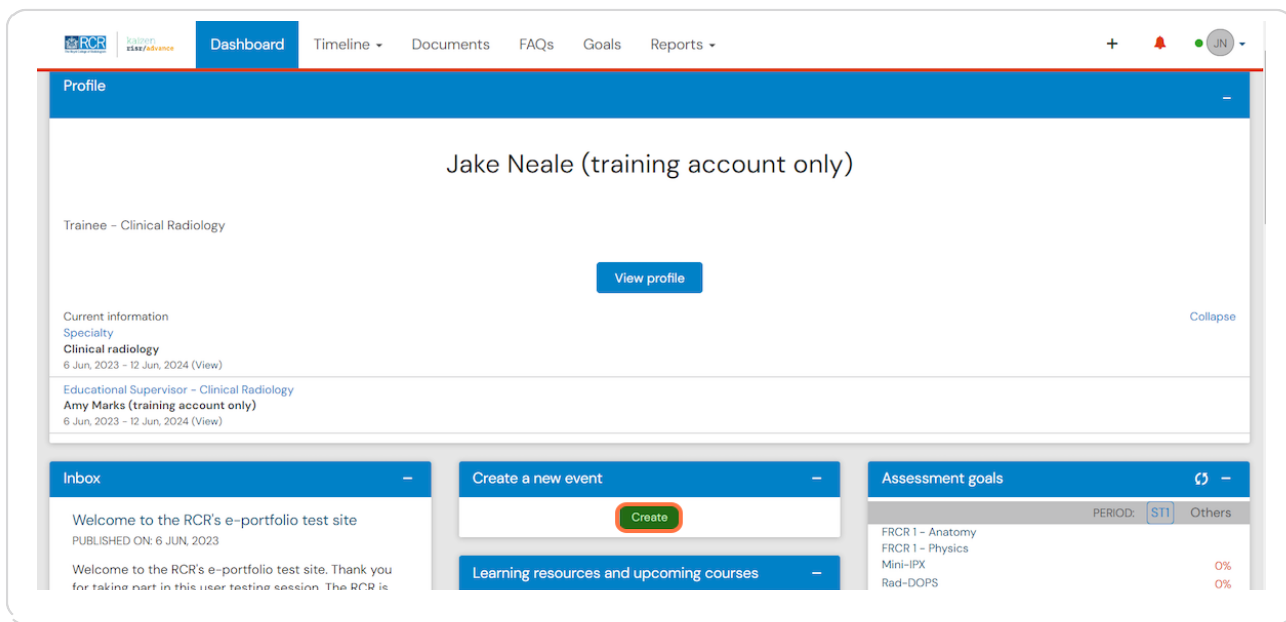
## # Adding curriculum goals

7 Steps

## STEP 8

### From your dashboard click on Create

You can also click the + button in the top righthand corner of your screen



## STEP 9

### Select Curriculum Goals from the goals section of the create menu

The screenshot shows the 'Goals' section of the RCR system. The navigation bar includes 'Dashboard', 'Timeline', 'Documents', 'FAQs', 'Goals', and 'Reports'. The 'Goals' section is divided into several categories: 'Assessment and evidence', 'Reflection', and 'Goals'. Under the 'Goals' category, the following options are listed:

- Curriculum goals - Clinical radiology curriculum procedures and milestones (highlighted with a red box)
- Custom goals
- ST1 assessment goals - Clinical radiology
- ST2 assessment goals - Clinical radiology
- ST3 assessment goals - Clinical radiology
- ST4 assessment goals - Clinical radiology
- ST5 assessment goals - Clinical radiology

Other options listed under 'Assessment and evidence' include: Mini Imaging Interpretation Exercise (Mini-IPX), MSF, Multi-disciplinary team meeting assessment (MDTA), Quality Improvement Project/Audit Assessment Tool (QIPAT), Rad-DOPS, Supporting Evidence, and Teaching Observation.

## STEP 10

### Enter the start and end dates for the goal period

The end date should be your expected CCT date

The screenshot shows the 'New Curriculum goals - Clinical radiology curriculum procedures and milestones' form. The navigation bar includes 'Dashboard', 'Timeline', 'Documents', 'FAQs', 'Goals', and 'Reports'. The form title is 'New Curriculum goals - Clinical radiology curriculum procedures and milestones'. Below the title, there are options for 'VERSION 7', 'Add tags', and 'Link to goals'. A note states 'Fields marked with \* are required.' and 'LAST SAVED: TODAY AT 12:03 PM'. A blue box contains the text: 'This event will be added onto your timeline as a SHARED event. Only users with permissions to view this event on your timeline will be able to view this event.' The 'Date occurred on' field is set to '7/6/2023' and the 'End date' field is set to '1/8/2025'. Below these fields is a 'Description (optional)' text area.

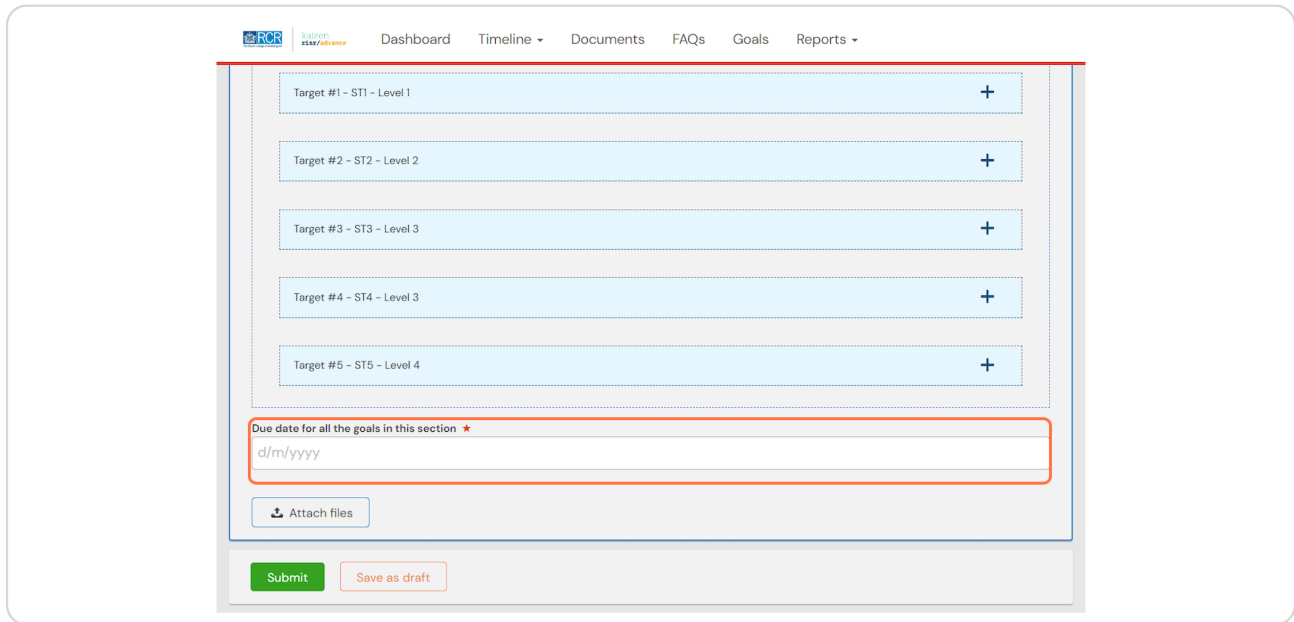
## STEP 11

The goals for for this goal set have been pre-set according to the minimum curriculum requirements

## STEP 12

Enter the due date for all the goals in this section

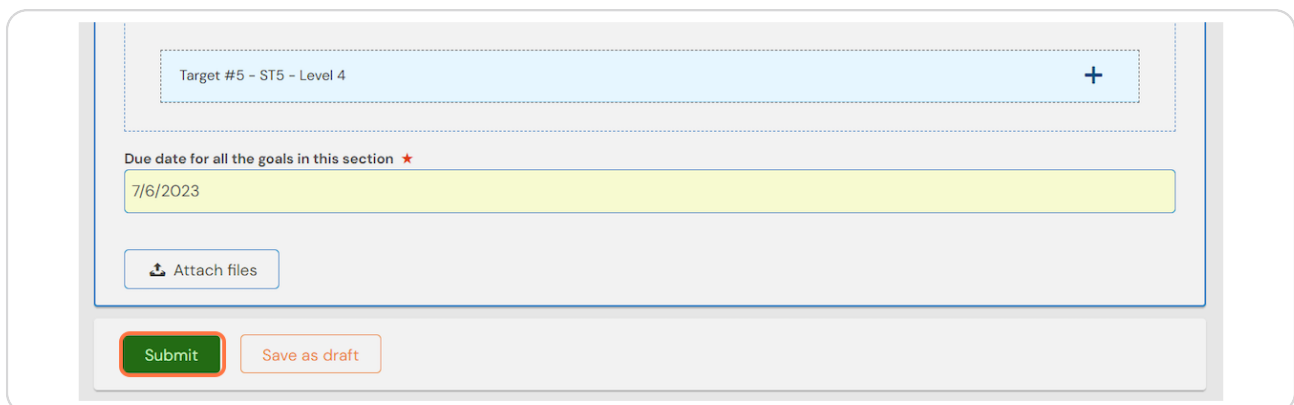
This should be your expected CCT date



The screenshot shows a web interface for setting goals. At the top, there is a navigation bar with the RCR logo and links for 'Dashboard', 'Timeline', 'Documents', 'FAQs', 'Goals', and 'Reports'. Below this, there is a list of five targets, each in a light blue box with a '+' icon on the right: 'Target #1 - ST1 - Level 1', 'Target #2 - ST2 - Level 2', 'Target #3 - ST3 - Level 3', 'Target #4 - ST4 - Level 3', and 'Target #5 - ST5 - Level 4'. Below the targets is a text input field with a red asterisk and the label 'Due date for all the goals in this section \*'. The placeholder text is 'd/m/yyyy'. Below the input field is a button labeled 'Attach files'. At the bottom of the form are two buttons: 'Submit' (green) and 'Save as draft' (orange).

## STEP 13

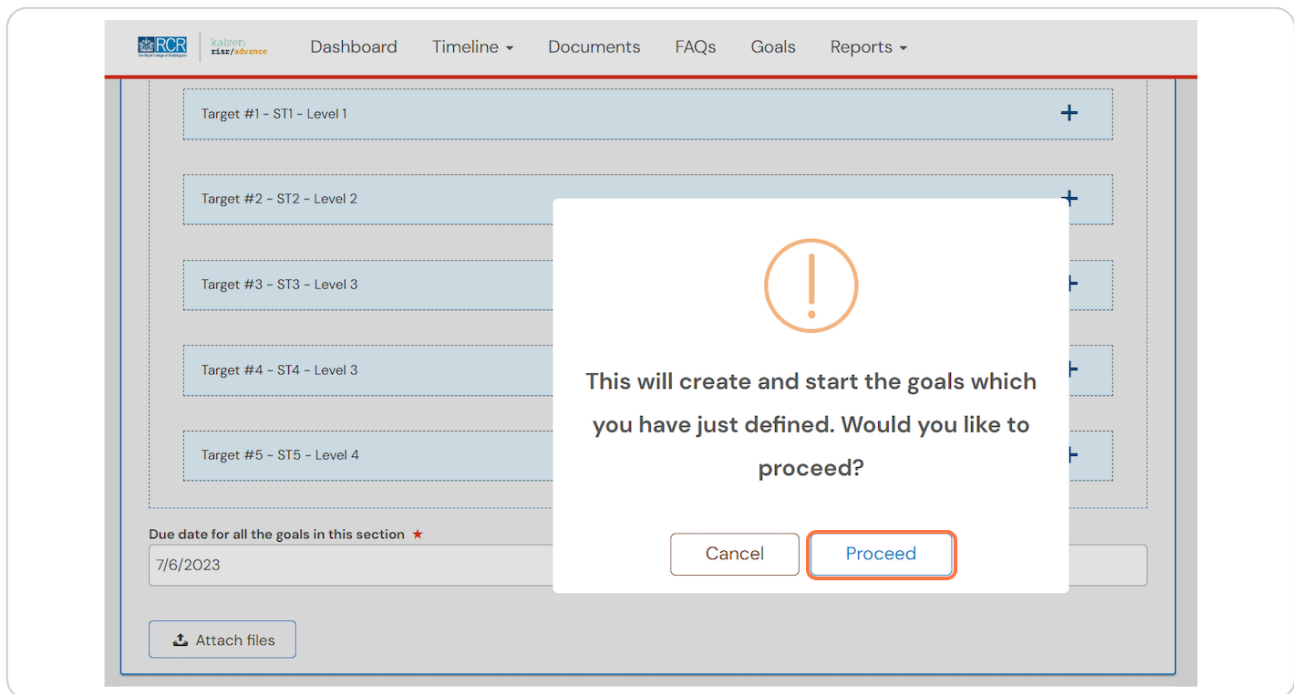
Click on Submit



This screenshot shows the same goal set configuration page as in Step 12, but with the due date field filled in with '7/6/2023'. The 'Submit' button is now highlighted with a red border, indicating it is the next step to click.

## STEP 14

### Click on Proceed



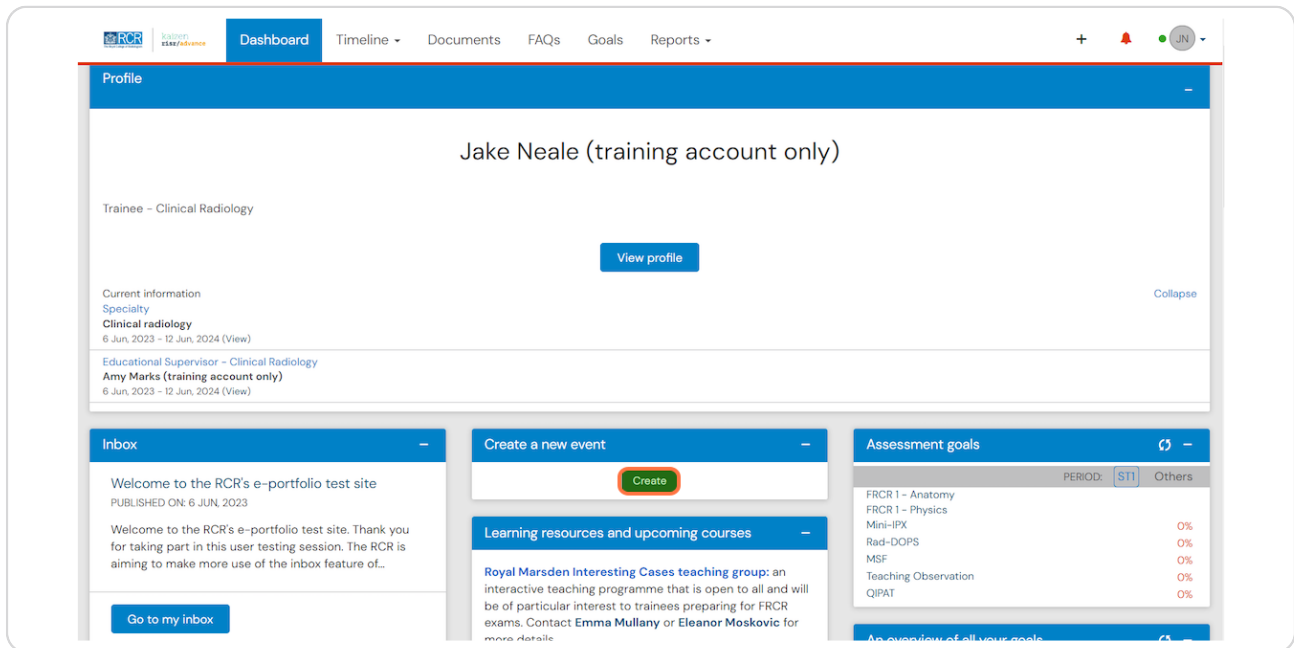
The screenshot displays a web application interface with a navigation bar at the top containing the RCR logo, 'RCPSC/advance', and menu items: Dashboard, Timeline, Documents, FAQs, Goals, and Reports. The main content area lists five targets: Target #1 - ST1 - Level 1, Target #2 - ST2 - Level 2, Target #3 - ST3 - Level 3, Target #4 - ST4 - Level 3, and Target #5 - ST5 - Level 4. A confirmation dialog box is centered on the screen, featuring an orange exclamation mark icon and the text: "This will create and start the goals which you have just defined. Would you like to proceed?". Below the text are two buttons: "Cancel" and "Proceed". The "Proceed" button is highlighted with a red border. At the bottom left of the interface, there is a section for "Due date for all the goals in this section" with a date field containing "7/6/2023" and an "Attach files" button.



## STEP 15

### From your dashboard click on Create

You can also click the + button in the top righthand corner of your screen



## STEP 16

### Select Custom goals from the goals section of the create menu

The screenshot shows the 'Goals' section of the RCR system. The navigation bar includes 'Dashboard', 'Timeline', 'Documents', 'FAQs', 'Goals', and 'Reports'. The 'Goals' section is expanded, showing a list of goal categories. The 'Custom goals' option is circled in red. Other categories include 'Assessment and evidence', 'Reflection', 'Curriculum goals - Clinical radiology curriculum procedures and milestones', 'ST1 assessment goals - Clinical radiology', 'ST2 assessment goals - Clinical radiology', 'ST3 assessment goals - Clinical radiology', 'ST4 assessment goals - Clinical radiology', and 'ST5 assessment goals - Clinical radiology'.

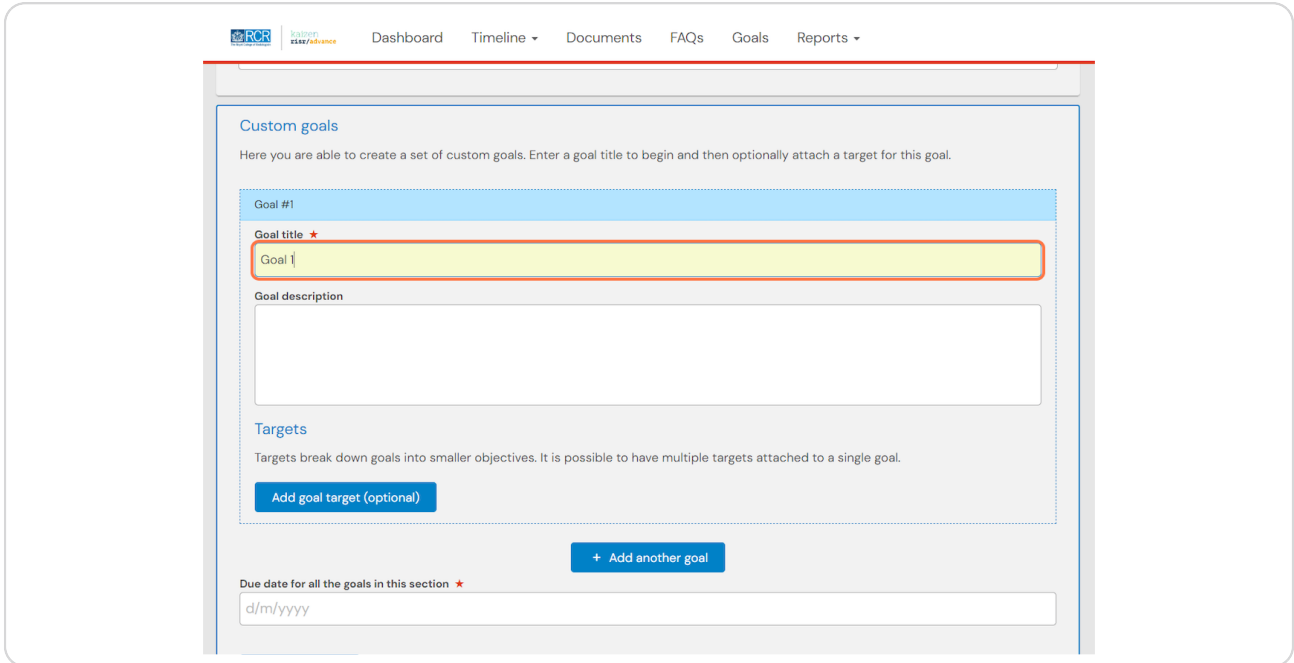
## STEP 17

### Enter the start and end dates for the goal period

The screenshot shows the 'New Custom goals' form. The navigation bar includes 'Dashboard', 'Timeline', 'Documents', 'FAQs', 'Goals', and 'Reports'. The form title is 'New Custom goals'. Below the title, there are options for 'VERSION 1', 'Add tags', and 'Link to goals'. A message states 'Fields marked with ★ are required.' and 'LAST SAVED: TODAY AT 12:13 PM'. A blue box contains a warning: 'This event will be added onto your timeline as a SHARED event. Only users with permissions to view this event on your timeline will be able to view this event.' The 'Date occurred on ★' and 'End date ★' fields are highlighted with a red box. The 'Date occurred on' field contains '7/6/2023' and the 'End date' field contains '7/6/2023'. Below these fields, there is a 'Description (optional)' text area.

## STEP 18

### Add your custom goals



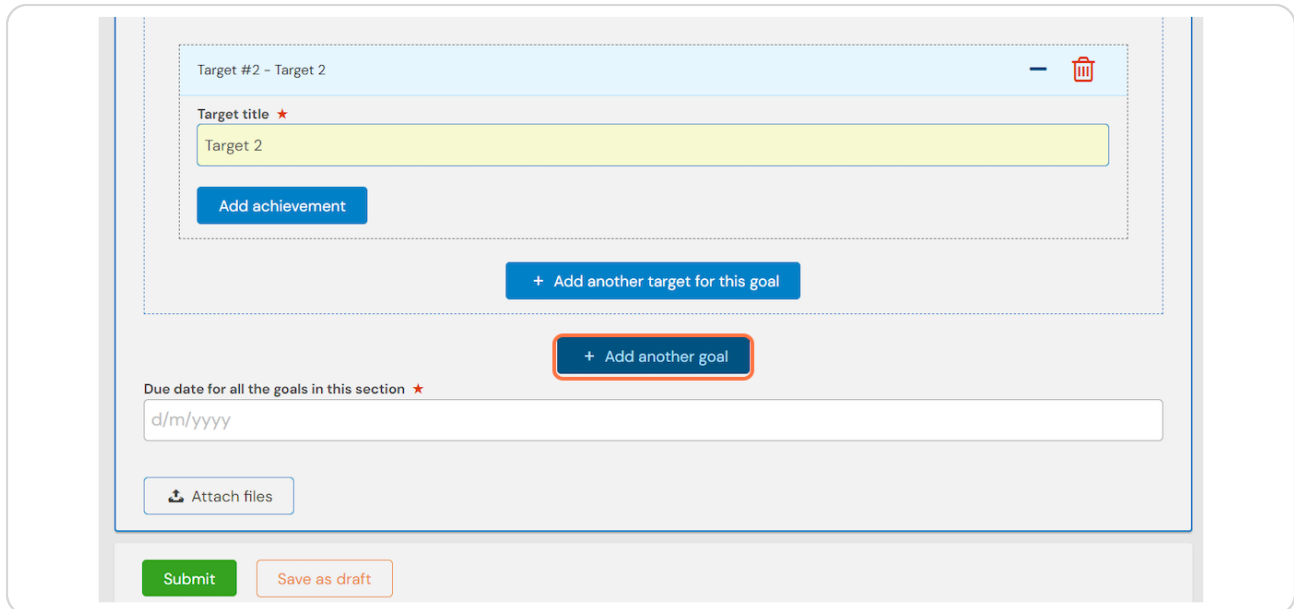
The screenshot shows a web application interface for adding custom goals. At the top, there is a navigation bar with the RCR logo, 'RCPSC 1347/Adv-ance', and menu items: Dashboard, Timeline, Documents, FAQs, Goals, and Reports. The main content area is titled 'Custom goals' and contains the following elements:

- A header section 'Goal #1' with a light blue background.
- A 'Goal title' field with a red asterisk, containing the text 'Goal 1'.
- A 'Goal description' text area.
- A 'Targets' section with a sub-header and explanatory text: 'Targets break down goals into smaller objectives. It is possible to have multiple targets attached to a single goal.' Below this is a blue button labeled 'Add goal target (optional)'.
- A blue button labeled '+ Add another goal' located below the 'Targets' section.
- A 'Due date for all the goals in this section' field with a red asterisk, containing the placeholder text 'd/m/yyyy'.



## STEP 21

Clicking on **Add another goal** will allow you to add additional goals to this goal set

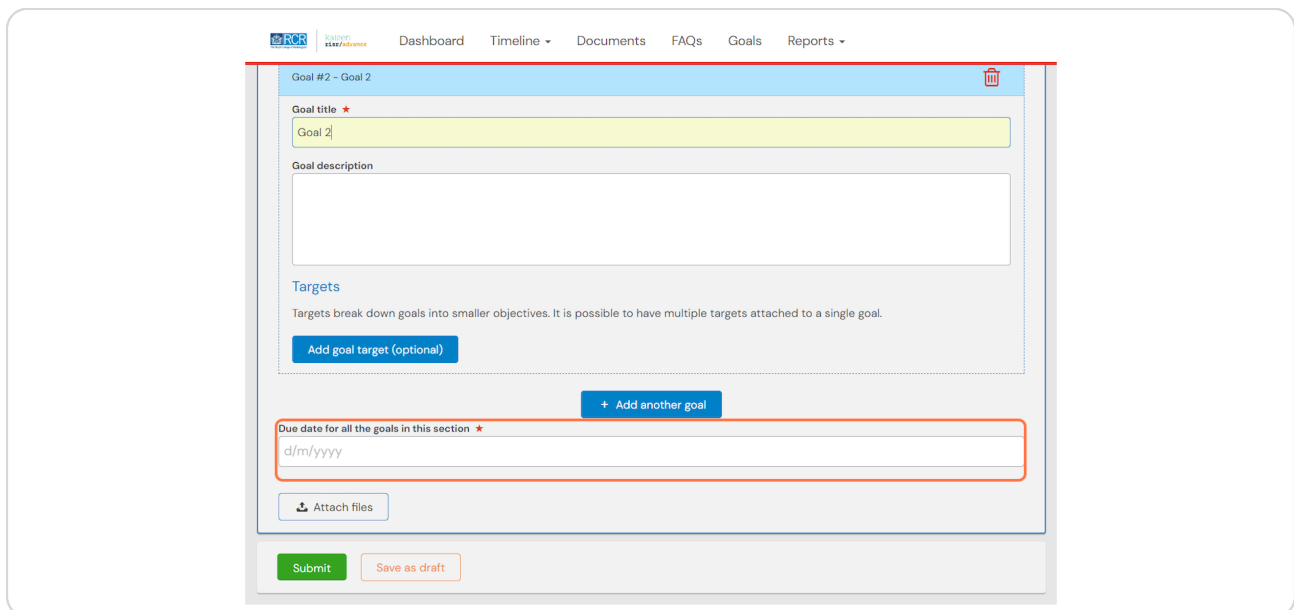


The screenshot shows a web interface for creating a goal set. At the top, there is a header for 'Target #2 - Target 2' with a minus sign and a trash icon. Below this is a 'Target title' field containing 'Target 2' and an 'Add achievement' button. A blue button labeled '+ Add another target for this goal' is positioned below the target details. At the bottom of the target section, a blue button labeled '+ Add another goal' is highlighted with a red border. Below this is a 'Due date for all the goals in this section' field with a placeholder 'd/m/yyyy' and an 'Attach files' button. At the very bottom, there are 'Submit' and 'Save as draft' buttons.

## STEP 22

Enter the due date for all the goals in this goal set

All goals in a goal set must have the same due date. Separate goal sets will need to be created for goals with different due dates



The screenshot shows a web interface for creating a goal set. At the top, there is a header for 'Goal #2 - Goal 2' with a trash icon. Below this is a 'Goal title' field containing 'Goal 2' and a 'Goal description' field. A blue button labeled '+ Add another goal' is highlighted with a red border. Below this is a 'Due date for all the goals in this section' field with a placeholder 'd/m/yyyy' and an 'Attach files' button. At the bottom, there are 'Submit' and 'Save as draft' buttons. The interface also includes a 'Targets' section with a description and an 'Add goal target (optional)' button.

## STEP 23

### Click on Submit

**Targets**

Targets break down goals into smaller objectives. It is possible to have multiple targets attached to a single goal.

[Add goal target \(optional\)](#)

[+ Add another goal](#)

**Due date for all the goals in this section \***

7/6/2023

[Attach files](#)

[Submit](#) [Save as draft](#)

## STEP 24

### Click on Proceed

RCR Support star/advance Dashboard Timeline Documents FAQs Goals Reports

Goal #2 - Goal 2

**Goal title \***

Goal 2

**Goal description**

**Targets**

Targets break down goals into smaller objectives. It is possible to have multiple targets attached to a single goal.

[Add goal target \(optional\)](#)

**Due date for all the goals in this section \***

7/6/2023

[Attach files](#)

[Submit](#) [Save as draft](#)

This will create and start the goals which you have just defined. Would you like to proceed?

[Cancel](#) [Proceed](#)

## STEP 25

You can view a summary of your goals and progress towards them from your dashboard

Clicking on a goal will take you to the detailed view for that goal

The screenshot shows the RCR e-portfolio dashboard. The top navigation bar includes 'Dashboard', 'Timeline', 'Documents', 'FAQs', 'Goals', and 'Reports'. The main content area is divided into several sections:

- Inbox:** A message titled 'Welcome to the RCR's e-portfolio test site' published on 6 JUN, 2023. A button 'Go to my inbox' is present.
- E-portfolio support:** Information about user guides, FAQs, and a weekly e-portfolio clinic.
- Create a new event:** A green 'Create' button.
- Learning resources and upcoming courses:** Two resource announcements: 'Royal Marsden Interesting Cases teaching group' and 'Radiological anatomy video series, My Lightbulb Moments'.
- Assessment goals:** A table showing progress for two periods, ST1 and ST3. The ST1 period includes goals for FRCR 1 - Anatomy, FRCR 1 - Physics, Mini-IPX, Rad-DOPS, MSF, Teaching Observation, and QIPAT, all at 0%. The ST3 period includes goals for FRCR 2A, Mini-IPX, Rad-DOPS, MSF, Teaching Observation, and QIPAT, all at 0%.
- An overview of all your goals:** A summary table showing progress for 'First year in training' (100%), 'Great British Bake Off' (0%), 'Successful first rotation' (100%), and 'Run 10k' (0%).

## STEP 26

You can also view all goals by selecting the Goals menu at the top of the screen

The screenshot shows the RCR e-portfolio dashboard for Jake Neale. The top navigation bar includes 'Dashboard', 'Timeline', 'Documents', 'FAQs', 'Goals', and 'Reports'. The main content area is titled 'Profile' and displays 'Jake Neale (training account only)'. Below the name, it indicates 'Trainee - Clinical Radiology' and a 'View profile' button. The 'Current information' section shows 'Specialty: Clinical radiology' (6 Jun, 2023 - 12 Jun, 2024) and 'Educational Supervisor - Clinical Radiology: Amy Marks (training account only)' (6 Jun, 2023 - 12 Jun, 2024). The 'Assessment goals' section is visible, showing a list of goals with progress bars: FRCR 1 - Anatomy (0%), FRCR 1 - Physics (0%), Mini-IPX (0%), Rad-DOPS (0%), MSF (0%), and Teaching Observation (0%).

## STEP 27

The goals summary page will show you all current and closed goals

You can change the order in which goals appear and click on any individual goal within a goal set to view more details for that goal. Clicking the + next to an goal will show any targets within that goal.

The screenshot shows the 'Goals' summary page. The top navigation bar includes 'Dashboard', 'Timeline', 'Documents', 'FAQs', 'Goals', and 'Reports'. The main content area is titled 'Goals' and features a search bar with the text 'Start typing to search' and a 'Search' button. Below the search bar, it indicates 'Found 54 items'. A dropdown menu shows the current sorting order: 'Ordered by created date (most recent first)'. The list of goals is displayed in two sections: 'ST3 assessment goals - Clinical radiology' and 'ST1 assessment goals - Clinical radiology'. The ST3 section includes goals like 'FRCR 2A (n/a)', 'Mini-IPX', 'Rad-DOPS', 'MSF', 'Teaching Observation', and 'QIPAT'. The ST1 section includes 'FRCR 1 - Anatomy (n/a)' and 'FRCR 1 - Physics (n/a)'. The 'Rad-DOPS' goal is highlighted with a red box and a '+' icon. The sidebar on the right contains 'Bookmarked searches', 'Advanced search' filters (State, Event type), and a 'Create a new goal event' section with a 'Create' button.



## STEP 28

The detailed view for each goal will allow you to manually update the progress of the goal by clicking **Mark goal as**

The screenshot shows the 'Mini-IPX' goal detail page. At the top, the goal status is 'IN PROGRESS' with a 'Mark goal as' button highlighted in a red box. Below this, it indicates '0% progress against this goal. 0/1 target completed.' The goal was created as part of ST3 assessment goals - Clinical radiology, with a due date of 12 Jun, 2024 and a period of ST3. The 'Event targets' section shows that 0 of 6 targets are linked, with a 'Link event to this target' button. A sidebar on the right lists other goals within the set: FRCR 2A, Mini-IPX (selected), Rad-DOPS, MSF, Teaching Observation, and QIPAT. The sidebar also shows '1 - 6 of 6' and an 'Information' section.

## STEP 29

Further detail can be added in the commentary box

The screenshot shows the 'Mini-IPX' goal detail page with the 'Mark this goal' dialog box open. The dialog box has a title 'Mark this goal' and a close button. It contains a 'Mark goal as' dropdown menu with 'Achieved' selected, and a 'Comment' text area with the text '6 mini-IPX complete'. At the bottom of the dialog box are 'Cancel' and 'Mark this goal' buttons. The background page is dimmed, showing the same 'Mark goal as' button and 'Event targets' section as in the previous screenshot.

## STEP 30

### The goal progress will be updated with the comments shown

You can change the status of the goal by clicking on Change

The screenshot shows a goal titled "Mini-IPX". The status is "Achieved" with a green checkmark and a "Change" button next to it. Below the status, it says "0% progress against this goal. 0/1 target completed." The goal was created as part of "ST3 assessment goals - Clinical radiology" with a due date of "12 Jun, 2024" and a period of "ST3". A "Resolution Comment" section contains the text "6 mini-IPX complete". The "Event targets" section states "The following targets have been set for this goal. Please link events that you think best satisfy the aim of this goal." A sidebar on the right lists "All goals within this set" including FRCR 2A, Mini-IPX (selected), Rad-DOPS, MSF, Teaching Observation, and QIPAT. The sidebar also shows "1 - 6 of 6" and an "Information" section.

## STEP 31

### You can manually link events to a target by clicking on Link event to this target

The screenshot shows the same "Mini-IPX" goal page, but the status is now "IN PROGRESS" with a blue "Mark goal as" button. The progress bar still shows "0% progress against this goal. 0/1 target completed." The goal was created as part of "ST1 assessment goals - Clinical radiology" with a due date of "31 Aug, 2024" and a period of "ST1". The "Event targets" section is the same. A "Mini IPX" section at the bottom has "0 of 6" and a "How are events linked?" link. A prominent blue button with a link icon says "Link event to this target". The sidebar on the right lists "All goals within this set" including FRCR 1 - Anatomy, FRCR 1 - Physics, Mini-IPX (selected), Rad-DOPS, MSF, Teaching Observation, and QIPAT. The sidebar also shows "1 - 7 of 7" and an "Information" section.

## STEP 32

You can either select an existing event or create a new event that will be linked to this goal

The screenshot shows the 'Mini-IPX' goal page. At the top, it indicates the goal is 'IN PROGRESS' with a 'Mark goal as' button and shows '0% progress against this goal. 0/1 target completed.' Below this, it states 'Created as part of ST1 assessment goals - Clinical radiology' with a due date of '31 Aug, 2024' and a period of 'ST1'. The 'Event targets' section explains that targets have been set and asks the user to link events. A dropdown menu is open, showing options: 'Link event to this target', 'Select existing event', 'CREATE NEW', and 'Mini Imaging Interpretation Exercise (Mini-IPX)'. A sidebar on the right lists 'All goals within this set' including 'FRCR 1 - Anatomy', 'FRCR 1 - Physics', 'Mini-IPX', 'Rad-DOPS', 'MSF', 'Teaching Observation', and 'QIPAT'.

## STEP 33

If you choose to select an existing event, you will be taken to a list of all relevant events

You can link events to the goal by clicking Link this event then clicking I'm done linking to complete and return to the detailed view of the goal

The screenshot shows the 'Mini-IPX' event list page. At the top, there is a navigation bar with 'Dashboard', 'Timeline', 'Documents', 'FAQs', 'Goals', and 'Reports'. The page title is 'Mini-IPX' with a goal of 'Mini-IPX'. A green button labeled 'I'm done Linking' is visible. Below the title, it says 'Currently showing only events that match this goal's targets' with a 'Show all events' button. There is a search bar with the text 'Start typing to search' and a 'Search' button. It indicates 'Found 7 items' and is 'Ordered by date created'. The list shows two events created in March 2020, both titled 'Mini-IPX' and created on '25 MAR, 2020'. Each event has a 'Link this event' button (highlighted with a red box) and a 'Show audit log' button. There are also 'Preview' buttons for each event.

