

Viewing, editing, and setting trainee goals

22 Steps

Created by

IT Team

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STEP 1

From your dashboard, select the trainee from the My Trainees list

The screenshot shows the RCR dashboard interface. At the top, there is a navigation bar with the RCR logo, 'kaizen risz/advance', and a 'Dashboard' button. Other navigation options include 'Timeline', 'Documents', 'Content', 'Reports', and 'User management'. A user profile icon 'AM' is visible in the top right corner.

The main content area displays the profile for 'Amy Marks'. Below the name is a 'View profile' button. The profile information is organized into sections: 'Current information' (Specialty: Clinical radiology, dates: 5 Jun, 2023 - 12 Jun, 2024), 'Locations' (Test location: 5 Jun, 2023 - 12 Jun, 2024), and a role description: 'Clinical Supervisor, Training Programme Director - Clinical Radiology, Educational Supervisor - Clinical Radiology'. A 'Collapse' link is on the right.

Below the profile, there are three main columns of widgets:

- Inbox:** Contains a welcome message and a 'Go to my inbox' button.
- Create a new event:** Includes a prompt to select who to create the event for, with 'MySelf' and 'Someone else' buttons.
- E-portfolio support:** Provides information about user guides, FAQs, and a weekly e-portfolio clinic.

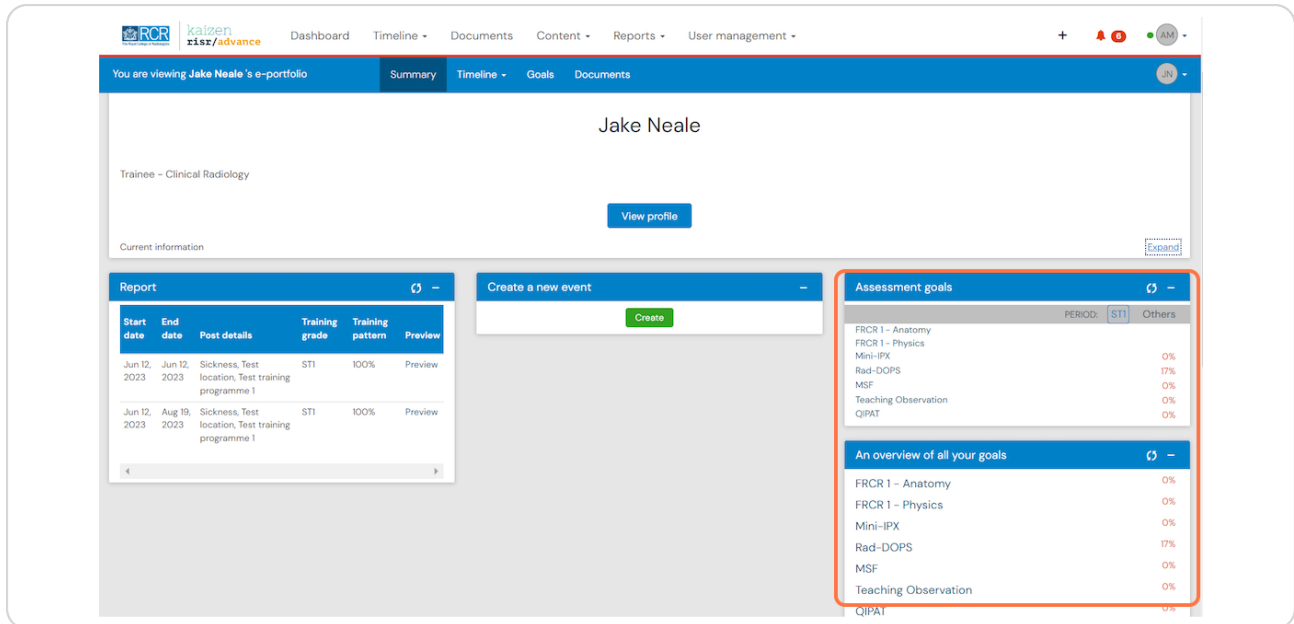
The 'My Trainees' widget is located below the 'Create a new event' widget. It lists trainees with circular icons and names. The trainee 'lake Neale' is highlighted with a red circle. Below it, 'TestCR4 TestCR4' is listed with a 'TT' icon.

At the bottom right, there is a 'Become an examiner' button.

STEP 2

You can view a summary of the trainee's current goals from their summary dashboard

The summary will show you the status of the goal, including the trainee's progress as a % where this is relevant. Clicking any one of the goals listed will take you to the detailed view for that goal

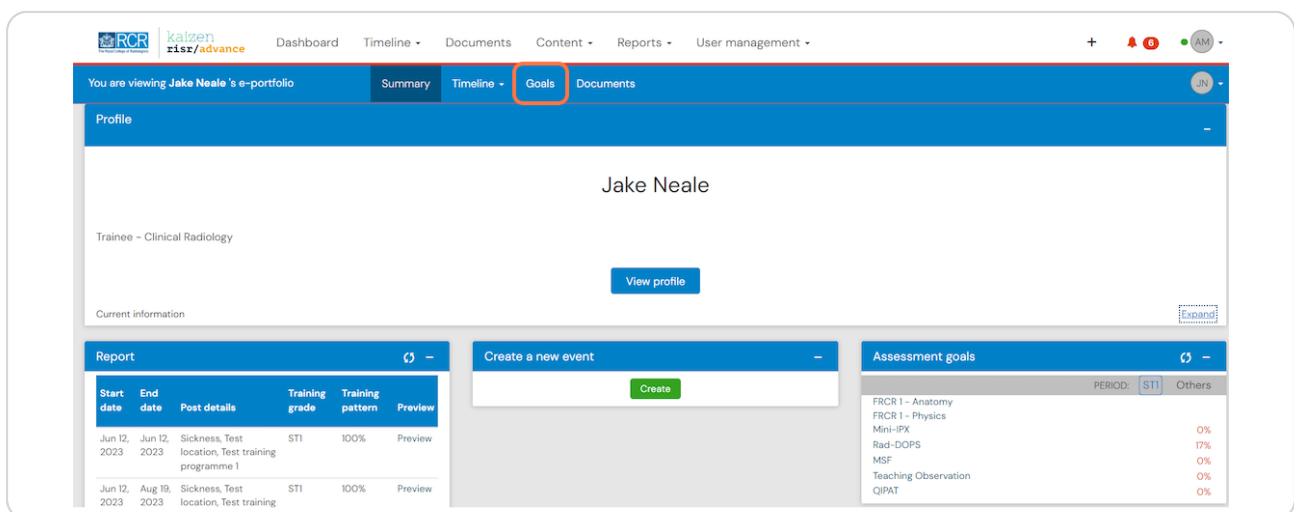


The screenshot shows the RCR e-portfolio summary dashboard for Jake Neale. The dashboard includes a navigation bar with 'Summary', 'Timeline', 'Goals', and 'Documents'. The 'Assessment goals' section is highlighted with a red box and contains the following data:

Goal	Progress (%)
FRCR 1 - Anatomy	0%
FRCR 1 - Physics	0%
Mini-IPX	17%
Rad-DOPS	17%
MSF	0%
Teaching Observation	0%
QIPAT	0%

STEP 3

You can view a full list of the trainee's goals by clicking on Goals at the top of their summary dashboard



The screenshot shows the RCR e-portfolio 'Goals' dashboard for Jake Neale. The 'Goals' tab is highlighted with a red box. The dashboard includes a navigation bar with 'Summary', 'Timeline', 'Goals', and 'Documents'. The 'Assessment goals' section is highlighted with a red box and contains the following data:

Goal	Progress (%)
FRCR 1 - Anatomy	0%
FRCR 1 - Physics	0%
Mini-IPX	17%
Rad-DOPS	17%
MSF	0%
Teaching Observation	0%
QIPAT	0%

STEP 4

You can change the order in which you view goals using the filter at the top of the goals list or complete an advanced search of the trainee's goals using the search box on the right hand side of the screen

The screenshot shows the 'Jake Neale's Goals' interface. At the top, there is a search bar with the text 'Start typing to search' and a 'Search' button. Below the search bar, it says 'Found 19 items'. The main content area displays a list of goals under the heading 'STI assessment goals - Clinical radiology'. The goals are listed with their progress bars and due dates. The 'Rad-DOPS' goal is highlighted with a red box. The sidebar on the right contains a 'Bookmarked searches' section, an 'Advanced search' section with input fields for 'State' and 'Event type', and an 'Information' section.

Goal	Progress	Due Date
STI assessment goals - Clinical radiology		21 JUN 2023
+ FRCR 1 - Anatomy (n/a)		
+ FRCR 1 - Physics (n/a)		
+ Mini-IPX	0%	
+ Rad-DOPS	17%	
+ MSF	0%	
+ Teaching Observation	0%	
+ QIPAT	0%	
Custom goals		23 JUN 2023
+ Test	0	

STEP 5

You can view the status and progress of a goal and click the + next to a goal to see the number of events linked to it

The screenshot shows the 'Jake Neale's Goals' interface with a detailed view of a goal. The 'Rad-DOPS' goal is highlighted with a red box, showing its progress bar at 17% and a sub-goal 'Rad-DOPS' with a progress bar at 1/6. The sidebar on the right contains a 'Bookmarked searches' section, an 'Advanced search' section with input fields for 'State' and 'Event type', and an 'Information' section.

Goal	Progress	Due Date
STI assessment goals - Clinical radiology		21 JUN 2023
+ FRCR 1 - Anatomy (n/a)		
+ FRCR 1 - Physics (n/a)		
+ Mini-IPX	0%	
+ Rad-DOPS	17%	
+ MSF	0%	
+ Teaching Observation	0%	
+ QIPAT	0%	
Custom goals		23 JUN 2023
+ Test	0	

STEP 6

Clicking on any individual goals will display the detailed view for the that goal

The screenshot shows a dashboard titled "Jake Neale's Goals". At the top, there is a search bar with the text "Start typing to search" and a "Search" button. Below the search bar, it says "Found 19 items". The main content area is divided into two sections: "ST1 assessment goals - Clinical radiology" and "Custom goals".

The "ST1 assessment goals - Clinical radiology" section is ordered by "due date" and has a due date of "21 JUN, 2023". It lists several goals with progress bars:

- FRCR 1 - Anatomy (n/a)
- FRCR 1 - Physics (n/a)
- Mini-IPX** (0% progress)
- Rad-DOPS (17% progress)
- MSF (0% progress)
- Teaching Observation (0% progress)
- QIPAT (0% progress)

Below the list, there are options to "Add more goals", "Change due date", and "Change periods".

The "Custom goals" section has a due date of "23 JUN, 2023" and lists a "Test" goal with 0% progress. It also has options to "Add more goals", "Change due date", and "Change periods".

On the right side, there are three panels: "Bookmarked searches" with a "Bookmark current search" button and an "Add" button; "Advanced search" with "State" and "Event type" dropdowns and an "Apply" button; and "Information" with a paragraph of text explaining that the page displays all shared goals for the user, grouped into goal sets, and that clicking on the title of each will take you into the details of that goal.

STEP 7

Clicking on show more will display all events linked to a goal

The screenshot shows the detailed view for the "Rad-DOPS" goal. At the top, there are navigation options: "Show audit log", "Reload", "Edit", and "Delete".

The main content area is divided into three sections:

- Goal Status:** "This goal is IN PROGRESS" with a "Mark goal as" button. Progress is shown as "17% progress against this goal. 0/1 target completed." with a red progress bar.
- Goal Information:** "Created as part of ST1 assessment goals - Clinical radiology", "Due date: 21 Jun, 2023", and "PERIOD: ST1".
- Event targets:** "The following targets have been set for this goal. Please link events that you think best satisfy the aim of this goal." Below this, there is a list of targets with "Rad-DOPS" selected. It shows "1 of 6" targets and a "How are events linked?" link. A "show more" button is highlighted with a red circle.

On the right side, there is a panel titled "All goals within this set" with a list of goals: "FRCR 1 - Anatomy", "FRCR 1 - Physics", "Mini-IPX", "Rad-DOPS" (selected with a double arrow), "MSF", "Teaching Observation", and "QIPAT". At the bottom of this panel, it says "1 - 7 of 7".

STEP 8

You can click on **Preview** to view linked events without leaving the current screen or click on the event title to go to the full view of that event

The screenshot displays the 'Rad-DOPS' goal management interface. At the top, the goal title 'Rad-DOPS' is shown with a 'Show audit log' link, a 'Reload' button, an 'Edit' button, and a 'Delete' button. Below this, the goal status is 'IN PROGRESS' with a 'Mark goal as' button. A progress bar indicates '17% 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 '21 Jun, 2023' and a period of 'ST1'. 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.' Underneath, there is a section for 'Rad-DOPS' with '1 of 6' events linked and a 'How are events linked?' link. A 'Show less' button is visible. The 'Links matching this target' section shows a single entry for 'Rad-DOPS' with a 'Procedure Name CT guided biopsy' and a 'Show audit log' link. A 'Preview' button is highlighted with a red circle. On the right side, a sidebar titled 'All goals within this set' lists various goals: 'FRCR 1 - Anatomy', 'FRCR 1 - Physics', 'Mini-IPX', 'Rad-DOPS' (selected), 'MSF', 'Teaching Observation', and 'QIPAT'. The sidebar indicates '1 - 7 of 7' items.

Editing a goal

5 Steps

STEP 9

From the detailed view of the goal click on **Edit**

This screenshot shows the same 'Rad-DOPS' goal management interface as in Step 8, but with the 'Edit' button highlighted with a red circle. The rest of the interface, including the goal status, progress bar, event targets, and sidebar, remains the same.

STEP 10

You can edit the goal, its targets and add additional targets to a goal

Click on Save to submit the edited goal

Goal #1 - Rad-DOPS

Goal title ★
Rad-DOPS

Goal description

Targets

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

Target #1 - Rad-DOPS + 🗑️

+ Add another target for this goal

STEP 11

You can update the status of a goal by clicking on Mark goal as

Goals can be marked as achieved, not achieved, partially achieved or carried forward.

Rad-DOPS

Show audit log Reload Edit Delete

This goal is IN PROGRESS Mark goal as

17% progress against this goal. 0/1 target completed.

Created as part of ST1 assessment goals - Clinical radiology
Due date: 21 Jun, 2023
PERIOD: ST1

Event targets

The following targets have been set for this goal. Please link events that you think best satisfy the aim of this goal.

Rad-DOPS

1 of 6 How are events linked?

show less

Links matching this target

Rad-DOPS ●● CREATED ON: 12 JUN, 2023

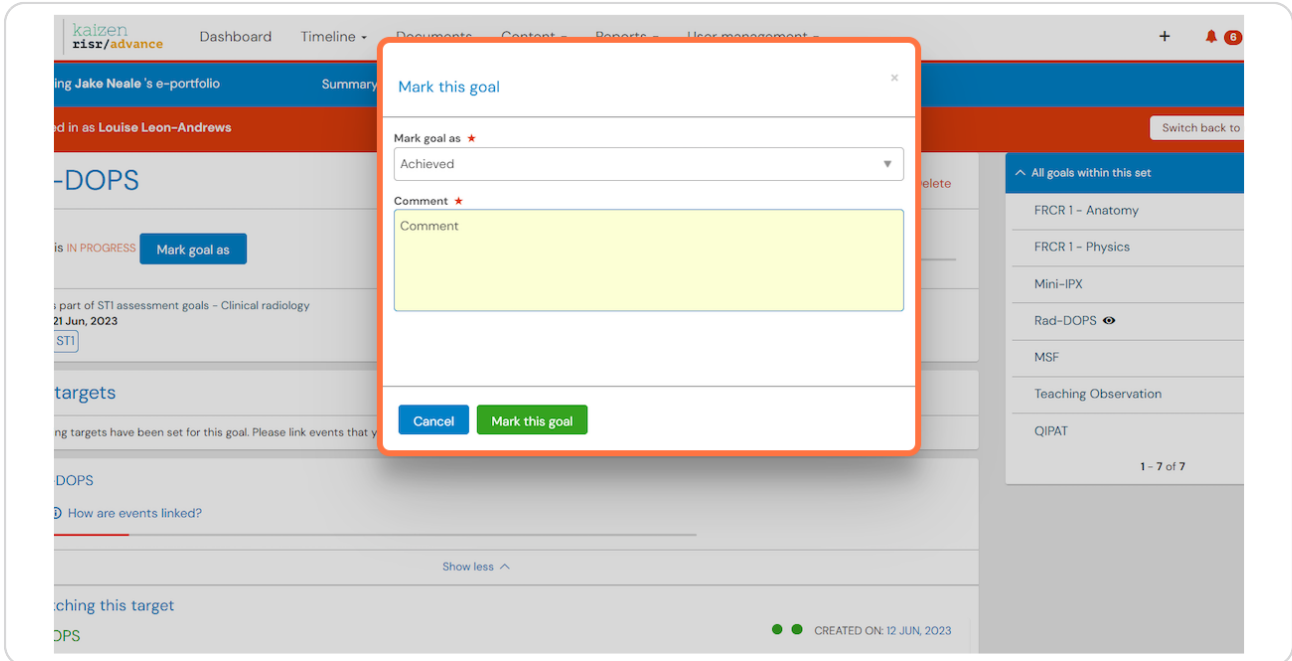
Procedure Name CT guided biopsy

Show audit log Preview

STEP 12

Select how you would like to mark the goal from the drop down list, add your comments and click on Mark this goal to save your changes

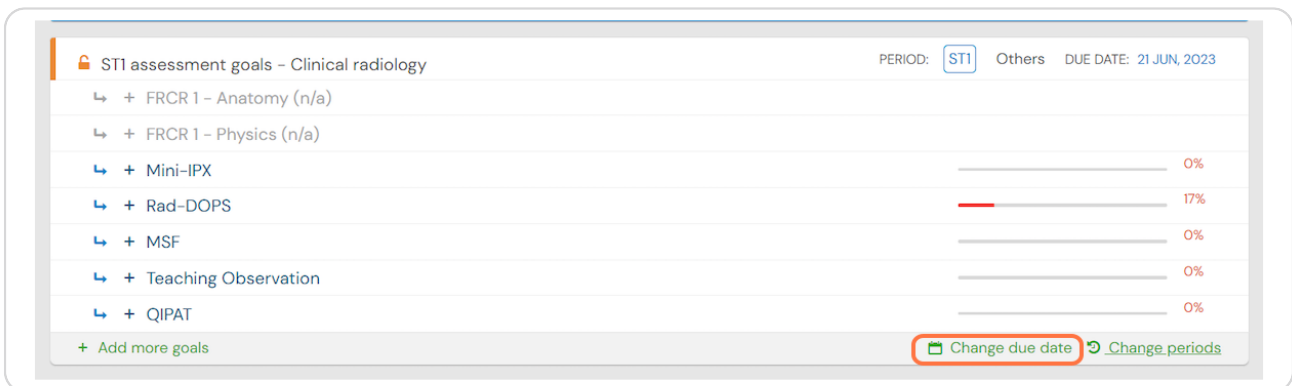
Please note that marking the status of the goal will close that goal for the trainee and they will no longer be able to add events to the goal.



STEP 13

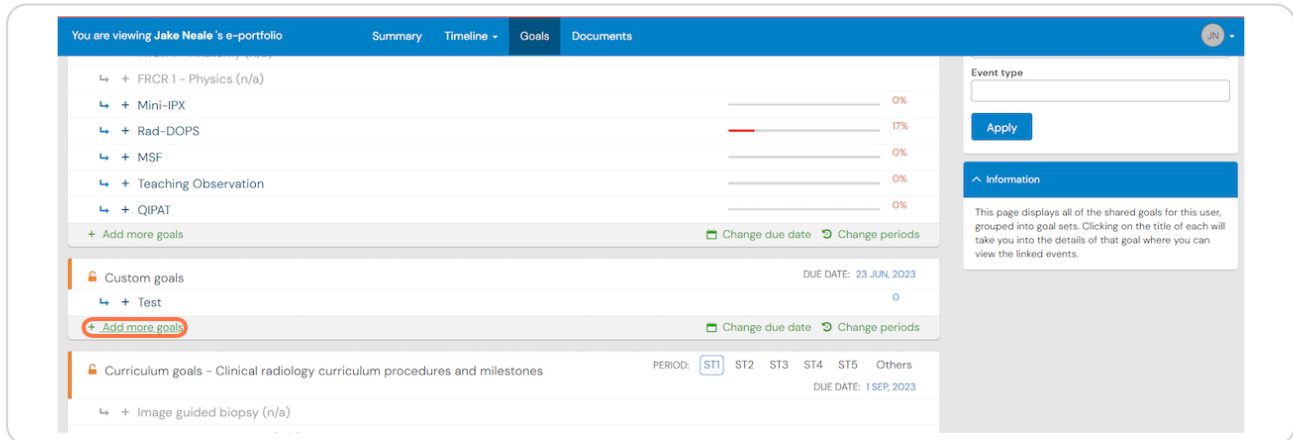
From the goal summary page you can also change the due date for the whole goal set by clicking on Change due date

All goals within a goal set must have the same due date. Goals with different due dates must be created as separate goal sets



STEP 14

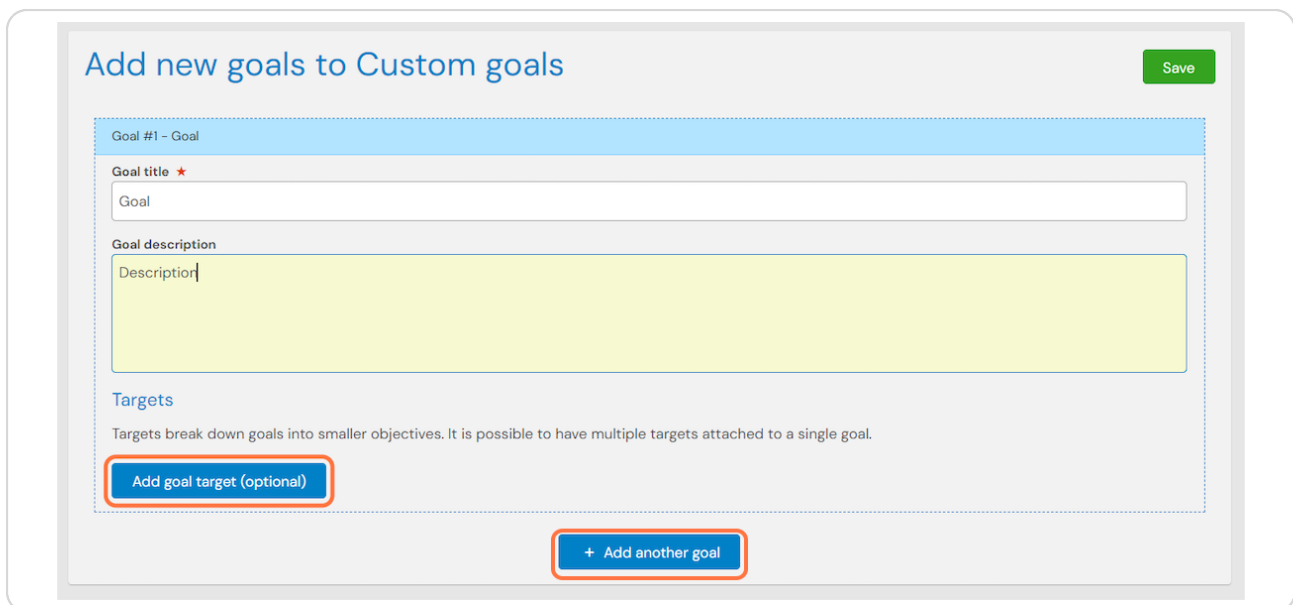
From the goals summary page, click on **Add more goals** under the goal set you would like to edit



STEP 15

Enter the goal title and description

You can add more goals by clicking on **Add another goal**. You can break goals down into smaller targets by clicking on **Add goal target (optional)**



STEP 16

Click on Save to set the goal for the trainee

Add new goals to Custom goals

[Save](#)

Goal #1 - Goal

Goal title *

Goal description

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)

+ Add another goal

Creating a new goal set for a trainee

6 Steps

STEP 17

From the trainee's summary dashboard click on Create

Profile

Jake Neale

Trainee - Clinical Radiology

View profile

Current information [Expand](#)

Report


Start date	End date	Post details	Training grade	Training pattern	Preview
Jun 12, 2023	Jun 12, 2023	Sickness, Test location, Test training programme 1	ST1	100%	Preview
Jun 12, 2023	Aug 19, 2023	Sickness, Test location, Test training programme 1	ST1	100%	Preview

Create a new event

Create

Assessment goals

	PERIOD:	ST1	Others
FRCR 1 - Anatomy			
FRCR 1 - Physics			
Mini-IPX			0%
Rad-DOPS			17%
MSF			0%
Teaching Observation			0%
QIPAT			0%

 **RCR**
The Royal College of Radiologists

10 of 15

STEP 18

Select the required goal type from the Goals section of the create menu

There are some pre-defined goals sets (e.g. the assessment goals for each training grade), but you can also create custom goals or create new PDP goals for the trainee

What would you like to create?

Supervision

Assign educational supervisor and specialty
CR Educational Supervisor's Structured Report
PDP goals

Goals

Curriculum goals - Clinical radiology curriculum procedures and milestones	ST2 assessment goals - Clinical radiology
Custom goals	ST3 assessment goals - Clinical radiology
PDP goals	ST4 assessment goals - Clinical radiology
ST1 assessment goals - Clinical radiology	ST5 assessment goals - Clinical radiology

STEP 19

Enter the date range covered by the goal set

RCR | kaizen | risz/advance | Dashboard | Timeline | Documents | Content | Reports | User management

You are viewing Jake Neale's e-portfolio | Summary | Timeline | Goals | Documents

New Custom goals for Jake Neale

VERSION 1

Fields marked with * are required. LAST SAVED: UNSAVED

This event will be added onto Jake Neale's timeline as a SHARED event. Only users with permissions to view this event on their timeline will be able to view this event.

Date occurred on *	End date *
14/6/2023	14/6/2023

Please indicate the date on which this event occurred. If this event spans multiple days, please indicate the date on which this finishes.

Description (optional)

Information

You are now filling in a section of an event. All the fields you are being asked to complete are displayed on this page. If you wish to return here and continue later then you can save as a draft and pick it up from your activity list. When you are finished click the submit button.

STEP 20

Enter the goal title and description

You can add more goals by clicking on Add another goal. You can break goals down into smaller targets by clicking on Add goal target (optional)

Add new goals to Custom goals Save

Goal #1 - Goal

Goal title *

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 \(optional\)](#)

[+ Add another goal](#)

STEP 21

Enter the due date for all the goals in this section

All goals within a goal set must have the same due date. Goals with different due dates must be created as separate goal sets

Custom goals

Here you are able to create a set of custom goals. Enter a goal title to begin and then optionally attach a target for this goal.

Goal #1 - Goal 1

Goal title *

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 \(optional\)](#)

[+ Add another goal](#)

Due date for all the goals in this section *

[Attach files](#)

STEP 22

Click on Submit to publish the goal set

You can also save the goal set as draft to return to later

The screenshot shows a web form for creating a goal. At the top, it says "Goal #1 - Goal 1". Below this is a "Goal title" field with a red asterisk, containing the text "Goal 1". Underneath is a "Goal description" field with the text "Description". A section titled "Targets" follows, with a sub-header "Targets" and a paragraph: "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)". To the right of this section is a blue button labeled "+ Add another goal". Below the targets section is a "Due date for all the goals in this section" field with a red asterisk, containing the date "30/6/2023". Below the due date field is a button labeled "Attach files" with a download icon. At the bottom of the form are two buttons: a green "Submit" button and a red "Save as draft" button.

