

# Completing educational supervision reports

46 Steps

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Created by  
WDAT

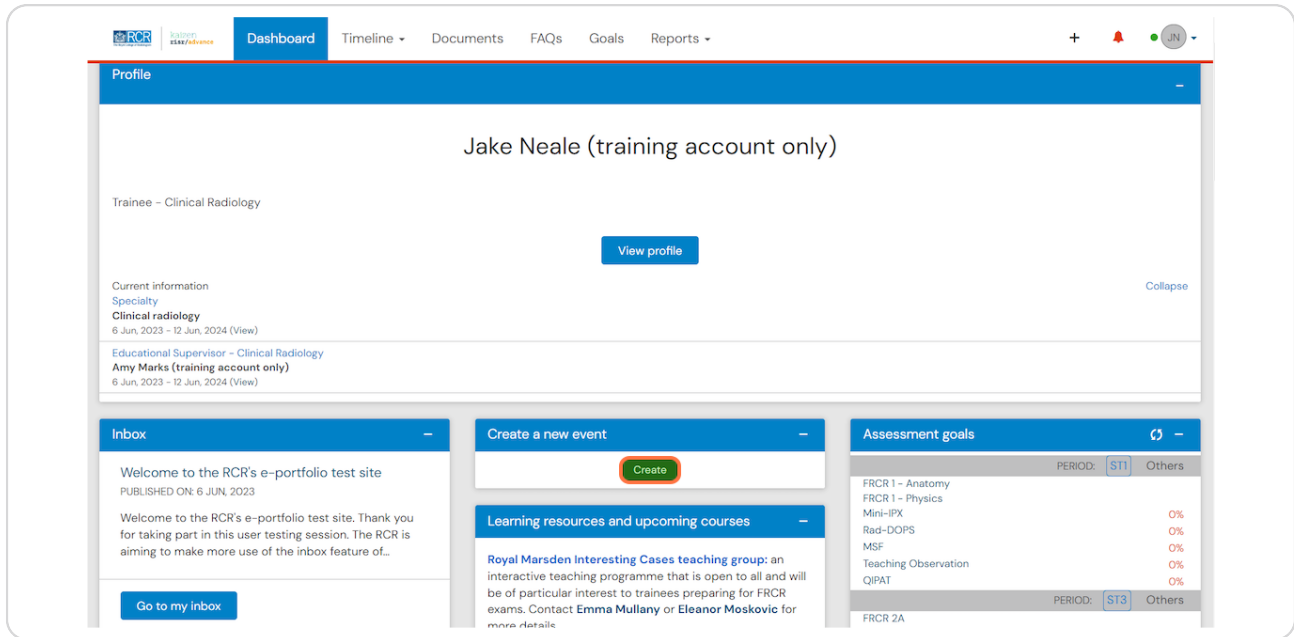
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## STEP 1

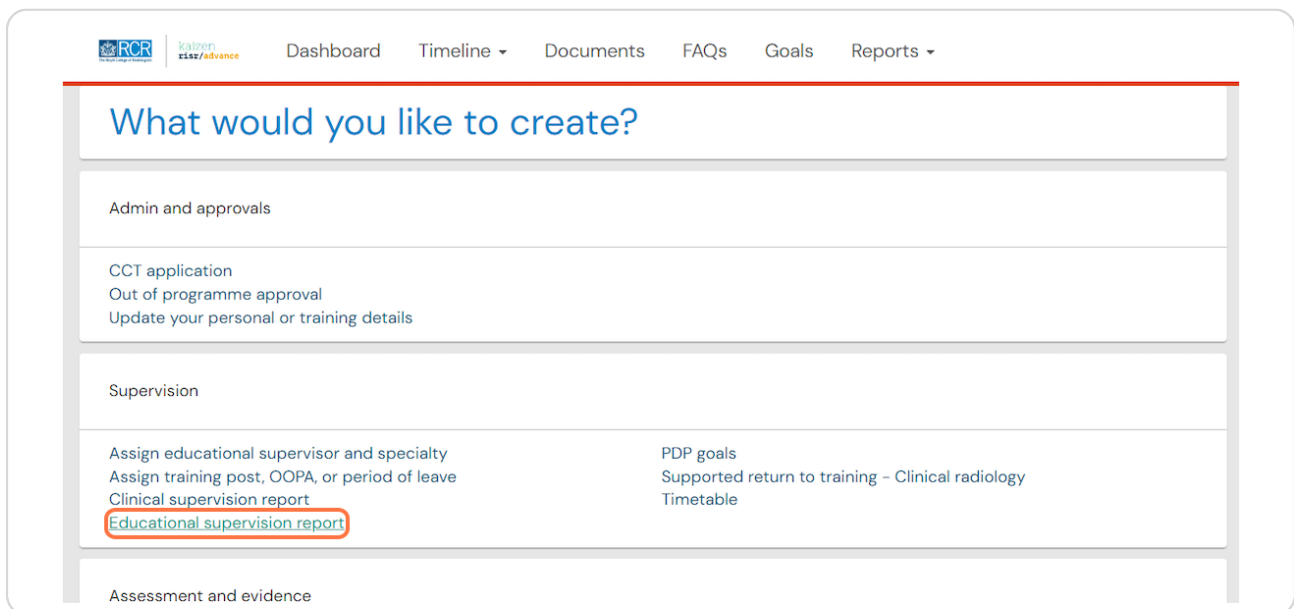
### From your dashboard click on Create

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



## STEP 2

### Click on Educational supervision report in the Supervision section of the create menu



### STEP 3

## Enter the start and end dates for the supervision report

The screenshot shows the 'New Educational supervision report' form. At the top, there is a navigation bar with 'RCR' and 'kalzen 1132/advance' logos, and menu items: 'Dashboard', 'Timeline', 'Documents', 'FAQs', 'Goals', and 'Reports'. The form title is 'New Educational supervision report' with 'VERSION 12', 'Add tags', and 'Link to goals' options. A note states 'Fields marked with ★ are required.' and 'LAST SAVED: UNSAVED'. A blue information box says: '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 contains '8/6/2023' with the instruction 'Please indicate the date on which this event occurred.' The 'End date ★' field contains '8/6/2023' with the instruction 'If this event spans multiple days, please indicate the date on which this finishes.' Below these is a 'Description (optional)' text area.

### STEP 4

## Select the purpose of the supervision report from the drop down list

This screenshot shows the same form as Step 3, but with the date fields filled in. The 'Date occurred on ★' field is '8/6/2023' and the 'End date ★' field is '8/6/2023'. The 'Description (optional)' field is empty. A blue box highlights the 'Please select the purpose of this supervision report ★' dropdown menu. The dropdown is open, showing a list of options: 'Educational supervisor's induction report', 'Educational supervisor's induction report', 'Educational supervisor's mid-year review', 'Informal/interim meeting', and 'Educational supervisor's end of year review'. The first option is highlighted in yellow.

## STEP 5

Select the Educational supervisor's induction report from the drop down list

Please select the purpose of this supervision report ★

Educational supervisor's induction report ▼

Training grade ★

Please ensure that you have created a PDP before your induction meeting with your supervisor. Your PDP goals will be pulled into this report and will form the basis of your discussion with your educational supervisor.

PDP goals report

Generate report

## STEP 6

You should ensure that you have completed a PDP prior to the induction meeting with your supervisor

Your PDP goals will be pulled into this report so that you can review these with your supervisor

Please select the purpose of this supervision report ★

Educational supervisor's induction report ▼

Training grade ★

Please ensure that you have created a PDP before your induction meeting with your supervisor. Your PDP goals will be pulled into this report and will form the basis of your discussion with your educational supervisor.

PDP goals report

Generate report

## STEP 7

Click on **Generate report** to pull your PDP goals into the report form

Please select the purpose of this supervision report ★

Educational supervisor's induction report ▼

Training grade ★

Please ensure that you have created a PDP before your induction meeting with your supervisor. Your PDP goals will be pulled into this report and will form the basis of your discussion with your educational supervisor.

PDP goals report

**Generate report**

What support is required to enable you to achieve these objectives?

## STEP 8

Complete the remaining information in the form

This report will be stored inside this event with the results as at the time of submission.

**Download PDF**

Goal title	Goal due date	Goal state	Preview
Goal 1	Jun 12, 2024	Open	Preview
Goal 2	Jun 12, 2024	Open	Preview

**Update report**


What support is required to enable you to achieve these objectives?

*This might include courses; e-learning activity; targeted clinical experience*

Are there any induction considerations to be taken into account?

## STEP 9

### You can attach any supporting documents by clicking on **Attach files**

 Attach files

The next section of this form can be filled in by users with these roles: Educational Supervisor – Clinical Radiology, RCR College Controller, Educational Supervisor – Clinical Oncology, Head of School – Clinical Oncology, Programme Administrator, Head of School – Clinical Radiology, Training Programme Director – Clinical Oncology, Training Programme Director – Clinical Radiology

**Who would you like to fill in the next section of this form? \***

Start typing to search

You can only invite users with a Kaizen account to fill in the next section. After typing at least 3 characters, we will suggest matches from known users in Kaizen. You may enter a user's name or email address

## STEP 10

### Enter the name of the supervisor you would like to complete the form

As you type your educational supervisor should appear beneath the text box and you can select their name from the list

The next section of this form can be filled in by users with these roles: Educational Supervisor – Clinical Radiology, RCR College Controller, Educational Supervisor – Clinical Oncology, Head of School – Clinical Oncology, Programme Administrator, Head of School – Clinical Radiology, Training Programme Director – Clinical Oncology, Training Programme Director – Clinical Radiology

**Who would you like to fill in the next section of this form? \***

Start typing to search

You can only invite users with a Kaizen account to fill in the next section. After typing at least 3 characters, we will suggest matches from known users in Kaizen. You may enter a user's name or email address

**Fill in on the same device**

No  Yes

**Submit** Save as draft

## STEP 11

### Click on Submit to send to your educational supervisor

Once their section is completed, the report will be published to your timeline

The next section of this form can be filled in by users with these roles: Educational Supervisor – Clinical Radiology, RCR College Controller, Educational Supervisor – Clinical Oncology, Head of School – Clinical Oncology, Programme Administrator, Head of School – Clinical Radiology, Training Programme Director – Clinical Oncology, Training Programme Director – Clinical Radiology

Who would you like to fill in the next section of this form? ★

You can only invite users with a Kaizen account to fill in the next section. After typing at least 3 characters, we will suggest matches from known users in Kaizen. You may enter a user's name or email address

Fill in on the same device

No  Yes

**Submit** Save as draft

## STEP 12

If you are with your educational supervisor when you create the report form, they can fill in their section before you submit the form.

## STEP 13

Check Fill in on the same device and the assessor's section will appear

The next section of this form can be filled in by users with these roles: Educational Supervisor – Clinical Radiology, RCR College Controller, Educational Supervisor – Clinical Oncology, Head of School – Clinical Oncology, Programme Administrator, Head of School – Clinical Radiology, Training Programme Director – Clinical Oncology, Training Programme Director – Clinical Radiology

Who would you like to fill in the next section of this form? ★

You can only invite users with a Kaizen account to fill in the next section. After typing at least 3 characters, we will suggest matches from known users in Kaizen. You may enter a user's name or email address

Fill in on the same device

No  Yes

### Summary of discussion with trainee

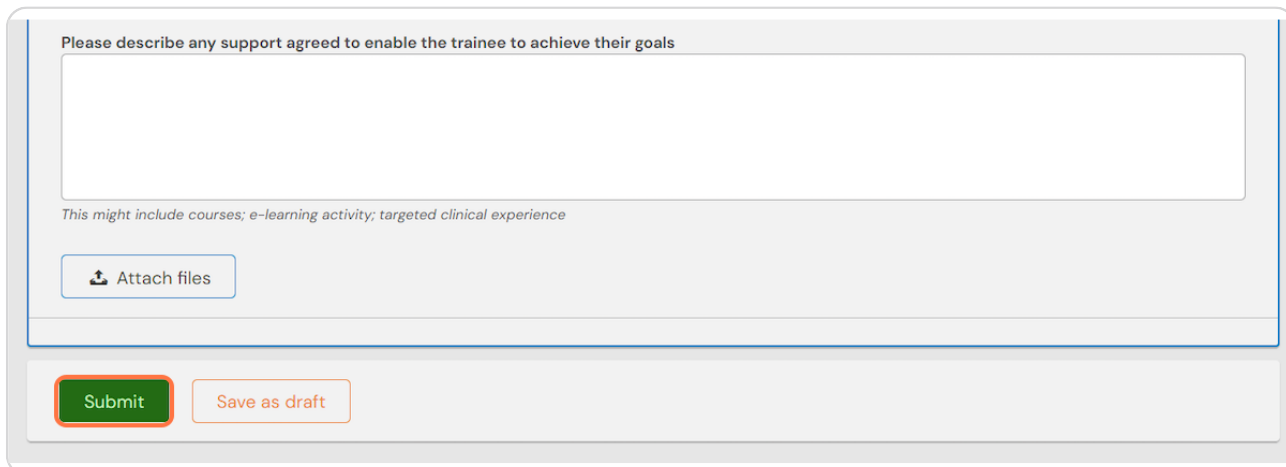
Supervisor's summary of discussion with trainee ★

Please describe any support agreed to enable the trainee to achieve their goals

## STEP 14

### Click on Submit

If the supervisor completes their section on the same device, they will receive an email when you submit the form asking them to confirm that they are happy with the information in the form before the report is completed.



Please describe any support agreed to enable the trainee to achieve their goals

This might include courses; e-learning activity; targeted clinical experience

Attach files

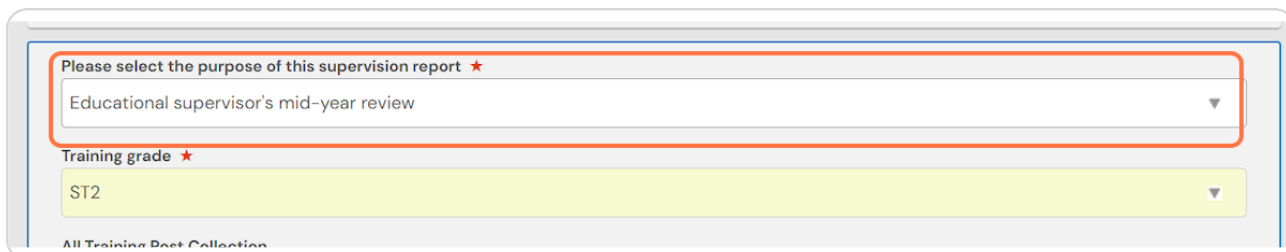
Submit Save as draft

## # Creating a mid-year review

11 Steps

## STEP 15

### Select Educational supervisor's mid-year review from the drop down list



Please select the purpose of this supervision report \*

Educational supervisor's mid-year review

Training grade \*

ST2

All Training Post Collection

## STEP 16

You can pull through a range of data into your form.



## STEP 17

Select the date range covered by the supervision review and click **Generate report**

Please select the purpose of this supervision report ★  
Educational supervisor's mid-year review

Training grade ★  
ST2

All Training Post Collection  
Review period from ★  
1/9/2017

Review period to ★  
31/8/2018

Generate report

PDP goals report

## STEP 18

Do this for all available reports

You can pull through summaries of the training posts you have completed, your PDP goals, previous educational or clinical supervision reports, and your workplace-based assessments and supporting evidence

RCR | RCR | RCR  
Dashboard Timeline Documents FAQs Goals Reports

Update report

WPBA and curriculum evidence summary report  
Select Start Date ★  
1/8/2020

Select End Date ★  
31/7/2021

Generate report

Educational supervision report summary  
Choose a Start Date ★  
1/5/2019

Choose an End Date ★  
31/8/2020

Generate report

Clinical supervision report summary  
Choose a Start Date ★  
1/5/2019

Choose an End Date ★  
31/8/2020

Generate report

Trainee comments

## STEP 19

### Complete the remaining information in the form

## STEP 20

### You can attach any supporting documents by clicking on **Attach files**

The screenshot shows a form interface. At the top left, there is a button labeled "Attach files" with a downward arrow icon. Below this, there is a text block explaining that the next section can be filled by users with specific roles: Educational Supervisor – Clinical Radiology, RCR College Controller, Educational Supervisor – Clinical Oncology, Head of School – Clinical Oncology, Programme Administrator, Head of School – Clinical Radiology, Training Programme Director – Clinical Oncology, and Training Programme Director – Clinical Radiology. Below the text is a question: "Who would you like to fill in the next section of this form? ★". Underneath is a search input field with the placeholder text "Start typing to search". A small note below the search field states: "You can only invite users with a Kaizen account to fill in the next section. After typing at least 3 characters, we will suggest matches from known users in Kaizen. You may enter a user's name or email address". At the bottom left of the form, there is a label "Fill in on the same device".

## STEP 21

### Enter the name of the supervisor you would like to complete the form

As you type your educational supervisor should appear beneath the text box and you can select their name from the list

This screenshot shows the same form as in Step 20, but with additional elements. The search input field "Start typing to search" is now highlighted with a red border. Below the search field, the text "Fill in on the same device" is followed by a toggle switch. The toggle is currently in the "No" position, with "Yes" to its right. At the bottom of the form, there are two buttons: a green "Submit" button and an orange "Save as draft" button.

## STEP 22

### Click on Submit to send to your educational supervisor

Once their section is completed, the report will be published to your timeline

The screenshot shows a form interface with the following elements:

- An "Attach files" button at the top left.
- A text block: "The next section of this form can be filled in by users with these roles: Educational Supervisor – Clinical Radiology, RCR College Controller, Educational Supervisor – Clinical Oncology, Head of School – Clinical Oncology, Programme Administrator, Head of School – Clinical Radiology, Training Programme Director – Clinical Oncology, Training Programme Director – Clinical Radiology".
- A question: "Who would you like to fill in the next section of this form? ★".
- A search input field with the placeholder text "Start typing to search".
- A note: "You can only invite users with a Kaizen account to fill in the next section. After typing at least 3 characters, we will suggest matches from known users in Kaizen. You may enter a user's name or email address".
- A section titled "Fill in on the same device" with a toggle switch currently set to "No".
- At the bottom, there are two buttons: "Submit" (green) and "Save as draft" (orange).

## STEP 23

If you are with your educational supervisor when you create the report form, they can fill in their section before you submit the form.

## STEP 24

Check Fill in on the same device and the assessor's section will appear

The screenshot shows a form interface with the following elements:

- The same text block as in Step 22: "The next section of this form can be filled in by users with these roles: Educational Supervisor – Clinical Radiology, RCR College Controller, Educational Supervisor – Clinical Oncology, Head of School – Clinical Oncology, Programme Administrator, Head of School – Clinical Radiology, Training Programme Director – Clinical Oncology, Training Programme Director – Clinical Radiology".
- The same question: "Who would you like to fill in the next section of this form? ★".
- The same search input field with the placeholder text "Start typing to search".
- The same note: "You can only invite users with a Kaizen account to fill in the next section. After typing at least 3 characters, we will suggest matches from known users in Kaizen. You may enter a user's name or email address".
- The "Fill in on the same device" section now has a toggle switch set to "Yes", which is highlighted with a red box.
- A new section titled "Summary of discussion with trainee" with a sub-question: "Supervisor's summary of discussion with trainee ★".
- A large empty text area for the supervisor's summary.

## STEP 25

### Click on Submit

If the supervisor completes their section on the same device, they will receive an email when you submit the form asking them to confirm that they are happy with the information in the form before the report is completed.

Please describe any support agreed to enable the trainee to achieve their goals

This might include courses; e-learning activity; targeted clinical experience

Attach files

Submit Save as draft

## # Creating a record of an informal meeting

8 Steps

## STEP 26

### Select Informal/interim meeting from the drop down list

RCR | kaizen risk/advance Dashboard Timeline Documents FAQs Goals Reports

Please select the purpose of this supervision report \*

Informal/interim meeting

Training grade \*

ST4

Purpose of informal meeting

## STEP 27

### Complete the remaining information in the form

**Purpose of informal meeting**

**List of those present, in addition to trainee and supervisor**

**Trainee comments**

*Please provide your comments on what has gone well during the period under review, areas for development, and any other relevant details.*

## STEP 28

### You can attach any supporting documents by clicking on **Attach files**

**Attach files**

The next section of this form can be filled in by users with these roles: Educational Supervisor – Clinical Radiology, RCR College Controller, Educational Supervisor – Clinical Oncology, Head of School – Clinical Oncology, Programme Administrator, Head of School – Clinical Radiology, Training Programme Director – Clinical Oncology, Training Programme Director – Clinical Radiology

**Who would you like to fill in the next section of this form? ★**

*You can only invite users with a Kaizen account to fill in the next section. After typing at least 3 characters, we will suggest matches from known users in Kaizen. You may enter a user's name or email address*

**Fill in on the same device**

## STEP 29

### Enter the name of the supervisor you would like to complete the form

As you type your educational supervisor should appear beneath the text box and you can select their name from the list

Attach files

The next section of this form can be filled in by users with these roles: Educational Supervisor – Clinical Radiology, RCR College Controller, Educational Supervisor – Clinical Oncology, Head of School – Clinical Oncology, Programme Administrator, Head of School – Clinical Radiology, Training Programme Director – Clinical Oncology, Training Programme Director – Clinical Radiology

Who would you like to fill in the next section of this form? ★

Start typing to search

You can only invite users with a Kaizen account to fill in the next section. After typing at least 3 characters, we will suggest matches from known users in Kaizen. You may enter a user's name or email address

Fill in on the same device

No  Yes

Submit Save as draft

## STEP 30

### Click on Submit to send to your educational supervisor

Once their section is completed, the report will be published to your timeline

The next section of this form can be filled in by users with these roles: Educational Supervisor – Clinical Radiology, RCR College Controller, Educational Supervisor – Clinical Oncology, Head of School – Clinical Oncology, Programme Administrator, Head of School – Clinical Radiology, Training Programme Director – Clinical Oncology, Training Programme Director – Clinical Radiology

Who would you like to fill in the next section of this form? ★

Start typing to search

You can only invite users with a Kaizen account to fill in the next section. After typing at least 3 characters, we will suggest matches from known users in Kaizen. You may enter a user's name or email address

Fill in on the same device

No  Yes

Submit Save as draft

## STEP 31

If you are with your educational supervisor when you create the report form, they can fill in their section before you submit the form.

## STEP 32

### Check Fill in on the same device and the assessor's section will appear

The next section of this form can be filled in by users with these roles: Educational Supervisor – Clinical Radiology, RCR College Controller, Educational Supervisor – Clinical Oncology, Head of School – Clinical Oncology, Programme Administrator, Head of School – Clinical Radiology, Training Programme Director – Clinical Oncology, Training Programme Director – Clinical Radiology

Who would you like to fill in the next section of this form? ★

You can only invite users with a Kaizen account to fill in the next section. After typing at least 3 characters, we will suggest matches from known users in Kaizen. You may enter a user's name or email address

**Fill in on the same device**

No  Yes

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Summary of discussion with trainee

Supervisor's summary of discussion with trainee ★

## STEP 33

### Click on Submit

If the supervisor completes their section on the same device, they will receive an email when you submit the form asking them to confirm that they are happy with the information in the form before the report is completed.

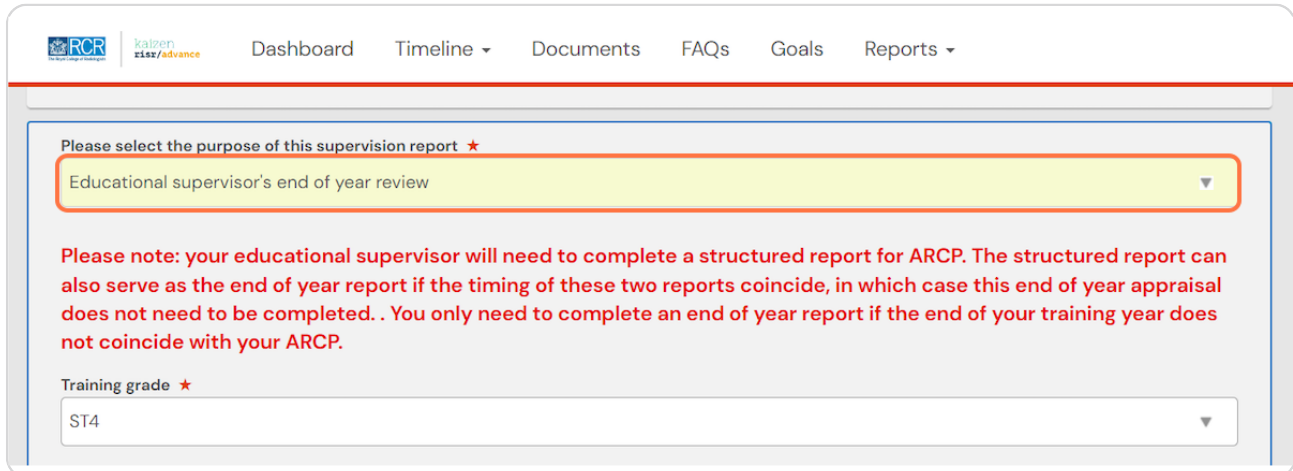
Please describe any support agreed to enable the trainee to achieve their goals

This might include courses; e-learning activity; targeted clinical experience

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## STEP 34

Select Educational supervisor's end of year review from the drop down list



The screenshot shows a web interface with a navigation bar at the top containing logos for RCR and RCR/advance, and menu items for Dashboard, Timeline, Documents, FAQs, Goals, and Reports. The main content area has a heading "Please select the purpose of this supervision report" with a red star icon. Below this is a dropdown menu with "Educational supervisor's end of year review" selected and highlighted in yellow. A red note follows: "Please note: your educational supervisor will need to complete a structured report for ARCP. The structured report can also serve as the end of year report if the timing of these two reports coincide, in which case this end of year appraisal does not need to be completed. . You only need to complete an end of year report if the end of your training year does not coincide with your ARCP." Below the note is another dropdown menu labeled "Training grade" with "ST4" selected.

## STEP 35

**Please note: your educational supervisor will need to complete a structured report for ARCP.**

The structured report can also serve as the end of year report if the timing of these two reports coincide, in which case this end of year appraisal does not need to be completed. You only need to complete an end of year report if the end of your training year does not coincide with your ARCP.

## STEP 36

You can pull through a range of data into your form.



## STEP 37

Select the date range covered by the supervision review and click **Generate report**

Please select the purpose of this supervision report ★  
Educational supervisor's mid-year review

Training grade ★  
ST2

All Training Post Collection  
Review period from ★  
1/9/2017

Review period to ★  
31/8/2018

Generate report

## STEP 38

Do this for all available reports

You can pull through summaries of the training posts you have completed, your PDP goals, previous educational or clinical supervision reports, and your workplace-based assessments and supporting evidence

Update report

WPBA and curriculum evidence summary report  
Select Start Date ★  
1/8/2020

Select End Date ★  
31/7/2021

Generate report

Educational supervision report summary  
Choose a Start Date ★  
1/5/2019

Choose an End Date ★  
31/8/2020

Generate report

Clinical supervision report summary  
Choose a Start Date ★  
1/5/2019

Choose an End Date ★  
31/8/2020

Generate report

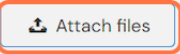
Trainee comments

## STEP 39

### Complete the remaining information in the form

## STEP 40

### You can attach any supporting documents by clicking on **Attach files**

 Attach files

The next section of this form can be filled in by users with these roles: Educational Supervisor – Clinical Radiology, RCR College Controller, Educational Supervisor – Clinical Oncology, Head of School – Clinical Oncology, Programme Administrator, Head of School – Clinical Radiology, Training Programme Director – Clinical Oncology, Training Programme Director – Clinical Radiology

Who would you like to fill in the next section of this form? ★

Start typing to search

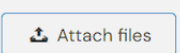
You can only invite users with a Kaizen account to fill in the next section. After typing at least 3 characters, we will suggest matches from known users in Kaizen. You may enter a user's name or email address

Fill in on the same device

## STEP 41

### Enter the name of the supervisor you would like to complete the form

As you type your educational supervisor should appear beneath the text box and you can select their name from the list

 Attach files

The next section of this form can be filled in by users with these roles: Educational Supervisor – Clinical Radiology, RCR College Controller, Educational Supervisor – Clinical Oncology, Head of School – Clinical Oncology, Programme Administrator, Head of School – Clinical Radiology, Training Programme Director – Clinical Oncology, Training Programme Director – Clinical Radiology

Who would you like to fill in the next section of this form? ★

Start typing to search

You can only invite users with a Kaizen account to fill in the next section. After typing at least 3 characters, we will suggest matches from known users in Kaizen. You may enter a user's name or email address


Fill in on the same device

No  Yes

## STEP 42

### Enter the name of the supervisor you would like to complete the form

As you type your educational supervisor should appear beneath the text box and you can select their name from the list

 Attach files

The next section of this form can be filled in by users with these roles: Educational Supervisor – Clinical Radiology, RCR College Controller, Educational Supervisor – Clinical Oncology, Head of School – Clinical Oncology, Programme Administrator, Head of School – Clinical Radiology, Training Programme Director – Clinical Oncology, Training Programme Director – Clinical Radiology

Who would you like to fill in the next section of this form? ★

Start typing to search

You can only invite users with a Kaizen account to fill in the next section. After typing at least 3 characters, we will suggest matches from known users in Kaizen. You may enter a user's name or email address

Fill in on the same device


No  Yes

**Submit** Save as draft

## STEP 43

### Click on Submit to send to your educational supervisor

Once their section is completed, the report will be published to your timeline

 Attach files

The next section of this form can be filled in by users with these roles: Educational Supervisor – Clinical Radiology, RCR College Controller, Educational Supervisor – Clinical Oncology, Head of School – Clinical Oncology, Programme Administrator, Head of School – Clinical Radiology, Training Programme Director – Clinical Oncology, Training Programme Director – Clinical Radiology

Who would you like to fill in the next section of this form? ★

Start typing to search

You can only invite users with a Kaizen account to fill in the next section. After typing at least 3 characters, we will suggest matches from known users in Kaizen. You may enter a user's name or email address

Fill in on the same device

No  Yes

**Submit** Save as draft

## STEP 44

If you are with your educational supervisor when you create the report form, they can fill in their section before you submit the form.

## STEP 45

Check Fill in on the same device and the assessor's section will appear

The next section of this form can be filled in by users with these roles: Educational Supervisor – Clinical Radiology, RCR College Controller, Educational Supervisor – Clinical Oncology, Head of School – Clinical Oncology, Programme Administrator, Head of School – Clinical Radiology, Training Programme Director – Clinical Oncology, Training Programme Director – Clinical Radiology

Who would you like to fill in the next section of this form? ★

Start typing to search

You can only invite users with a Kaizen account to fill in the next section. After typing at least 3 characters, we will suggest matches from known users in Kaizen. You may enter a user's name or email address

Fill in on the same device

No  Yes

Summary of discussion with trainee

Supervisor's summary of discussion with trainee ★

Please describe any support agreed to enable the trainee to achieve their goals

## STEP 46

Click on Submit

If the supervisor completes their section on the same device, they will receive an email when you submit the form asking them to confirm that they are happy with the information in the form before the report is completed.

Please describe any support agreed to enable the trainee to achieve their goals

This might include courses; e-learning activity; targeted clinical experience

Attach files

Submit Save as draft

