

Completing educational supervision reports

A guide for trainers

34 Steps

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STEP 1

Select the Clinical supervision report from the to do list on your dashboard

You can also access your to do list by clicking the bell icon at the top right of the page

The screenshot displays the RCR Supervisor dashboard. At the top, there is a navigation bar with the RCR logo, 'risz/advance', and a 'Dashboard' tab. Other tabs include 'Timeline', 'Documents', 'Content', 'Reports', and 'User management'. A notification bell icon is visible in the top right corner.

The main content area is titled 'Supervisor dashboard' and features a profile section for 'TestCOS1 TestCOS1' with a 'View profile' button. Below this, there are several widgets:

- Inbox:** Contains a welcome message and a 'Go to my inbox' button.
- Create a new event:** Prompts the user to select 'MySelf' or 'Someone else'.
- My Trainees:** Lists 'TestCO1 TestCO1' and 'TestCO3 TestCO3' with a 'View all users' button.
- E-portfolio support:** Provides information on user guides, FAQs, and a weekly e-portfolio clinic.
- Become an examiner:** Offers opportunities for doctors to get involved with FRCR examinations.

The 'To do list' widget is highlighted with a red box and contains the following item:

- Educational supervision report for TestCO1 TestCO1** (highlighted in red)
- CREATED ON: 19 JUL, 2023
- Awaiting your action

STEP 2

You can view the section completed by the trainee

All types of supervision report (except the structured report) are created from the same form. The first field in the trainee section will identify the purpose of the supervision report.

The screenshot displays the 'Educational supervision report for TestCO1' form. At the top, there is a navigation bar with the RCR logo, 'risx/advance', and menu items: 'Dashboard', 'Timeline', 'Documents', 'Content', 'Reports', and 'User management'. The main title is 'Educational supervision report for TestCO1' with a 'Fill in' button and 'Reject' and 'Back' links. Below the title, there are status indicators: 'DRAFT', 'PRIVATE', and 'AWAITING YOUR ACTION', along with 'VERSION 12' and a 'Show audit log' link. The 'Date occurred on' is '19 Jul, 2023' and the 'End date' is '2 Aug, 2023'. A section indicates 'Section filled in by TestCO1 TestCO1' on '19 JUL, 2023'. The form contains several fields: 'Training Pattern: 100%', 'Clinical oncology training grade: ST3', 'Specialty: Clinical oncology', and 'Locations: Test location'. A dropdown menu for 'Please select the purpose of this supervision report' is highlighted with a red box, showing the selected option 'Educational supervisor's induction report'. Below this, the 'Training grade' field is set to 'ST4'.

STEP 3

If any details are missing from the trainee's section or the report has been sent to you in error you can click on **Reject** to return the form to the trainee. You will be asked to provide an explanation for the trainee to view.

The screenshot shows a web interface for an educational supervision report. At the top, there is a navigation bar with the RCR logo and 'risx/advance' branding, followed by menu items: Dashboard, Timeline, Documents, Content, Reports, and User management. The main heading is 'Educational supervision report for TestCO1' with a sub-heading 'TestCO1'. On the right, there are buttons for 'Fill in' and 'Reject' (highlighted with a red box), and a 'Back' link. Below the heading, the status is 'DRAFT PRIVATE AWAITING YOUR ACTION', 'VERSION 12', and a 'Show audit log' link. The report details include 'Date occurred on 19 Jul, 2023' and 'End date 2 Aug, 2023'. A section header indicates 'Section filled in by TestCO1 TestCO1' with a 'FILLED IN ON 19 JUL, 2023' timestamp. The content area shows 'Training Pattern: 100%', 'Clinical oncology training grade: ST3', 'Specialty: Clinical oncology', and 'Locations: Test location'. Below this, there is a prompt 'Please select the purpose of this supervision report' with a dropdown menu showing 'Educational supervisor's induction report'. The 'Training grade' dropdown menu shows 'ST4'.

STEP 4

Click on **Fill in** to complete the supervisor's section of the form.

This screenshot is identical to the one in Step 3, showing the 'Educational supervision report for TestCO1' form. The 'Fill in' button is now highlighted with a red box, indicating the next step in the process. All other elements, including the navigation bar, status indicators, and report details, remain the same.

STEP 5

You can edit any of the details entered in the trainee section by scrolling to the bottom of the section and clicking on Edit

You must click on Fill in for this option to become available. This option is particularly useful if any of the reports completed by the trainee have an incorrect date range.

Educational supervision report summary

Download PDF

Type of report	Purpose of report	Start Date	End Date	Preview
Educational supervision report	-	Jun 12, 2023	Jun 1, 2024	Preview

Clinical supervision report summary

Download PDF

Report type	Purpose of report	Start Date	End Date	Preview
Clinical supervision report	-	Jul 17, 2023	Jul 17, 2023	Preview
Clinical supervision report	-	Jul 14, 2023	Jul 21, 2023	Preview
Grand total				

Edit

STEP 6

Click Save to complete any edits you have made

Trainee comments

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

Attach files

Save Cancel

STEP 7

If the trainee section is not visible, click on Show more to expand it

The screenshot shows the 'Educational supervision report for TestCO1 TestCO1' form. At the top, there is a navigation bar with the RCR logo and 'risx/advance' branding, along with menu items: Dashboard, Timeline, Documents, Content, Reports, and User management. The main title is 'Educational supervision report for TestCO1 TestCO1' with 'VERSION 13' below it. A status bar indicates 'LAST SAVED: UNSAVED' and a note that 'Fields marked with * are required.' The form contains several sections: 'Date occurred on 19 Jul, 2023' and 'End date 2 Aug, 2023'; 'Section filled in by TestCO1 TestCO1' with a 'FILLED IN ON 19 JUL, 2023' timestamp; a 'Show more' button highlighted with a red box; and a section titled 'This section is skipped'. Below this is a 'Summary of discussion with trainee' section, which includes a sub-section for 'Trainee successes during the period under review'.

STEP 8

A summary of any changes made to the trainee section will show at the start of the supervisor section

There is an option to cancel all changes if required.

The screenshot shows the 'Summary of discussion with trainee' section. At the top, a blue notification bar states 'You have made 1 change to the previous section(s). These changes will be applied when you submit.' and includes a 'Cancel all changes' button. Below this, the section is titled 'Summary of discussion with trainee' and includes a sub-section for 'Trainee successes during the period under review'. There are two empty text input fields for entering details.

STEP 9

Complete the required fields to summarise the discussion with the trainee at their induction meeting

Prompts below the text boxes provide further guidance

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

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

Attach files

Submit Save as draft

STEP 10

You can attach any relevant documents to the report by clicking on Attach files

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

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

Attach files

Submit Save as draft

STEP 11

To complete the report and publish it to the trainee's timeline click on **Submit**

You can click Save as draft if you wish to complete the form at a later date.

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

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

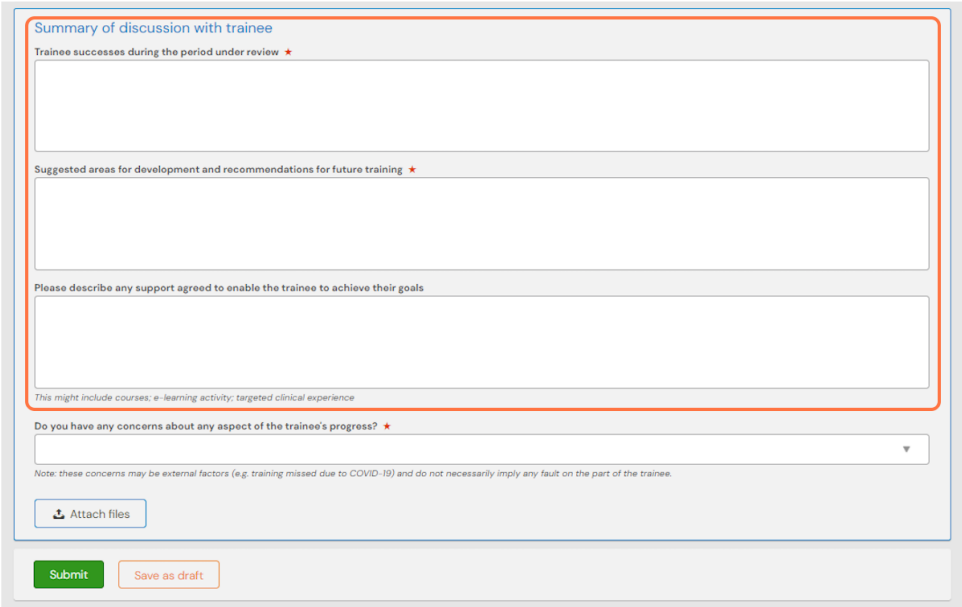
[Attach files](#)

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

STEP 12

Complete the required fields to summarise the discussion with the trainee at their mid-point review

Prompts below the text boxes provide further guidance



The screenshot shows a web form for a mid-year review. It contains the following elements:

- Summary of discussion with trainee** (Section Header)
- Trainee successes during the period under review *** (Text box)
- Suggested areas for development and recommendations for future training *** (Text box)
- Please describe any support agreed to enable the trainee to achieve their goals** (Text box)
- This might include courses: e-learning activity; targeted clinical experience* (Text below the third box)
- Do you have any concerns about any aspect of the trainee's progress? *** (Dropdown menu)
- Note: these concerns may be external factors (e.g. training missed due to COVID-19) and do not necessarily imply any fault on the part of the trainee.* (Text below the dropdown)
- Attach files** (Button)
- Submit** (Green button)
- Save as draft** (Red button)

A red border highlights the first three text boxes and the text below the third box.

STEP 13

Please state whether you have any concerns about the trainee's progress

If you select Yes, a box will appear for further comments. It is important to identify any potential concerns as early as possible in order to effectively support the trainee. Any detail you can include here will also help the ARCP panel to understand the trainee's progress and make an overall judgement at ARCP.

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

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

Do you have any concerns about any aspect of the trainee's progress? ★

Yes

Note: these concerns may be external factors (e.g. training missed due to COVID-19) and do not necessarily imply any fault on the part of the trainee.

Yes if yes, please provide details ★

STEP 14

You can attach any relevant documents to the report by clicking on **Attach files**

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

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

Do you have any concerns about any aspect of the trainee's progress? ★

No

Note: these concerns may be external factors (e.g. training missed due to COVID-19) and do not necessarily imply any fault on the part of the trainee.

Attach files

Submit Save as draft

STEP 15

To complete the report and publish it to the trainee's timeline click on **Submit**

You can click Save as draft if you wish to complete the form at a later date.

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

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

Do you have any concerns about any aspect of the trainee's progress? ★

No ▼

Note: these concerns may be external factors (e.g. training missed due to COVID-19) and do not necessarily imply any fault on the part of the trainee.

STEP 16

Complete the required fields to summarise the discussion with the trainee at the meeting

Prompts below the text boxes provide further guidance

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

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

Attach files

STEP 17

You can attach any relevant documents to the report by clicking on Attach files

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

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

Attach files

Submit Save as draft

STEP 18

To complete the report and publish it to the trainee's timeline click on Submit

You can click Save as draft if you wish to complete the form at a later date.

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

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

[Attach files](#)

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

Creating an end of year review

5 Steps

STEP 19

Please note that the structured report can act as the end of year review if the timing of these reports coincides

STEP 20

Complete the required fields to summarise the discussion with the trainee at their end of post review

Prompts below the text boxes provide further guidance. You will not be asked to assign entrustment levels for this CiPs; this is covered in the educational supervisor's structured report.

The screenshot shows a form titled "Summary of discussion with trainee". It contains three text boxes for input, each with a prompt and a red star icon. The first prompt is "Trainee successes during the period under review". The second is "Suggested areas for development and recommendations for future training". The third is "Please describe any support agreed to enable the trainee to achieve their goals", with a sub-prompt below it: "This might include courses; e-learning activity; targeted clinical experience". Below these is a dropdown menu with the prompt "Do you have any concerns about any aspect of the trainee's progress?". A note below the dropdown reads: "Note: these concerns may be external factors (e.g. training missed due to COVID-19) and do not necessarily imply any fault on the part of the trainee." At the bottom left is an "Attach files" button.

STEP 21

Please state whether you have any concerns about the trainee's progress

If you select Yes, a box will appear for further comments. It is important to identify any potential concerns as early as possible in order to effectively support the trainee. Any detail you can include here will also help the ARCP panel to understand the trainee's progress and make an overall judgement at ARCP.

This screenshot shows a close-up of the form from Step 21. The dropdown menu "Do you have any concerns about any aspect of the trainee's progress?" is set to "Yes". Below it is a note: "Note: these concerns may be external factors (e.g. training missed due to COVID-19) and do not necessarily imply any fault on the part of the trainee." Below the note is a text box with the prompt "Yes if yes, please provide details".

STEP 22

You can attach any relevant documents to the report by clicking on **Attach files**

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

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

Do you have any concerns about any aspect of the trainee's progress? ★

No

Note: these concerns may be external factors (e.g. training missed due to COVID-19) and do not necessarily imply any fault on the part of the trainee.

Attach files

Submit Save as draft

STEP 23

To complete the report and publish it to the trainee's timeline click on **Submit**

You can click Save as draft if you wish to complete the form at a later date.

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

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

Do you have any concerns about any aspect of the trainee's progress? ★

No

Note: these concerns may be external factors (e.g. training missed due to COVID-19) and do not necessarily imply any fault on the part of the trainee.

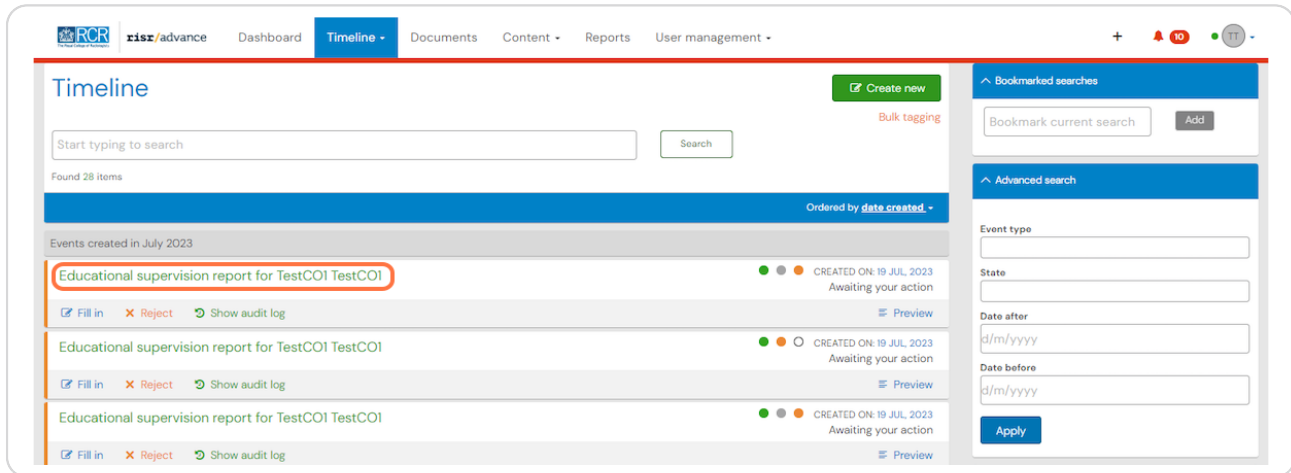
Attach files

Submit Save as draft

STEP 24

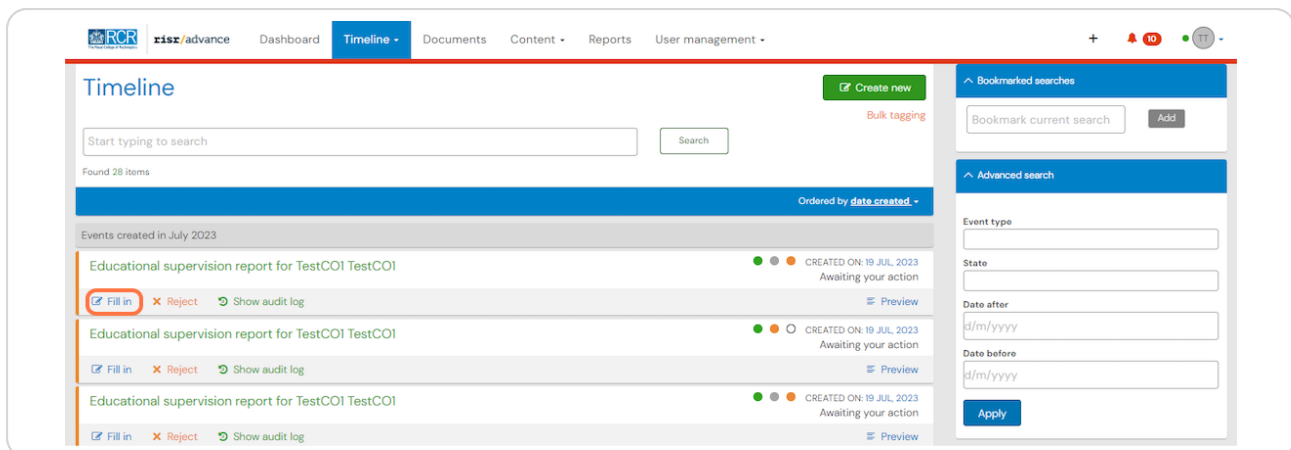
Locate the draft report in your timeline

Drafts are shown with an orange bar on the left. You can use the search box at the top of the page or the advanced search to the right of the screen to help you find the report. You can also find the draft report in your to do list.



STEP 25

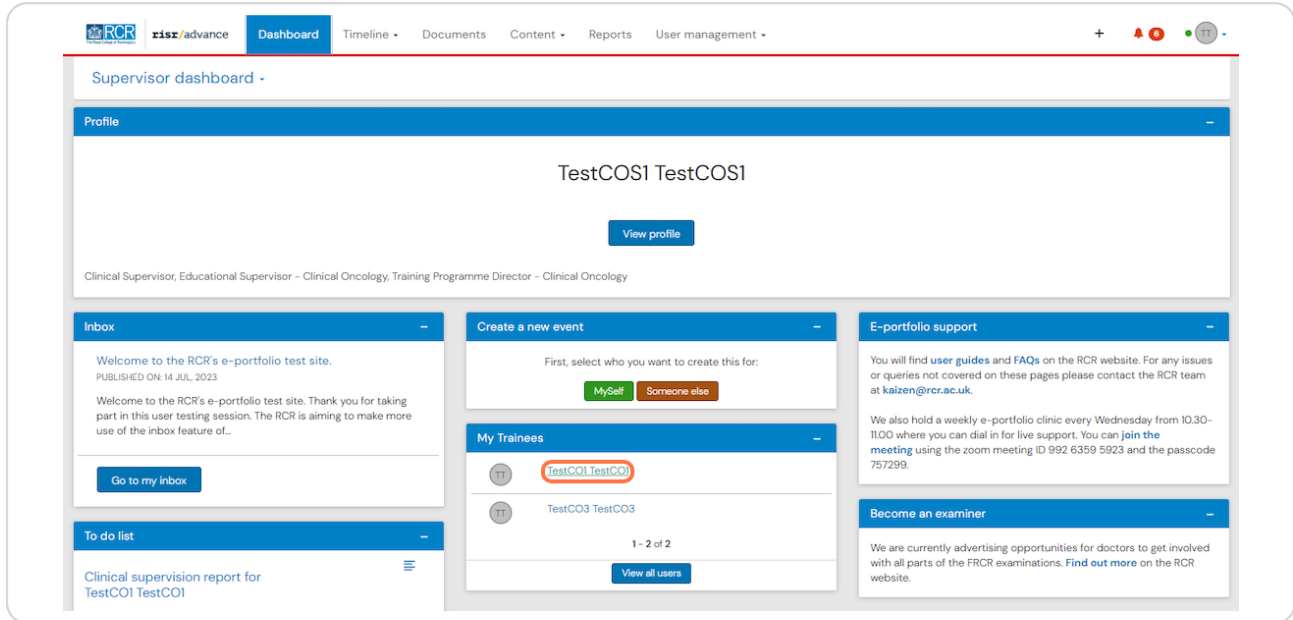
Click on Fill in to continue working on the report



STEP 26

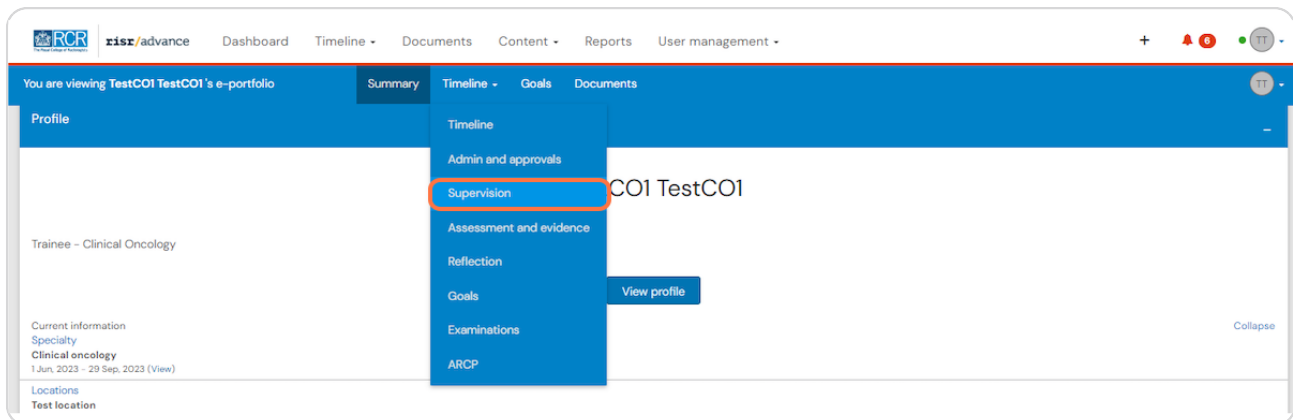
From your dashboard, select the trainee required

This will take you to the trainee's summary dashboard



STEP 27

Click on Timeline on the trainee's summary dashboard and select Supervision



STEP 28

Select the required report from the trainee's timeline

You can use the search box at the top of the page or the advanced search to the right of the screen to help you find the report

The screenshot shows the RCR RISZ/advance interface. At the top, there's a navigation bar with 'Dashboard', 'Timeline', 'Documents', 'Content', 'Reports', and 'User management'. Below this, a blue header indicates 'You are viewing TestCOI TestCOI's e-portfolio' with tabs for 'Summary', 'Timeline', 'Goals', and 'Documents'. The main content area is titled 'TestCOI TestCOI's Supervision' and includes a search bar with the text 'Start typing to search' and a 'Search' button. A green '+ Create new' button is also present. Below the search bar, it says 'Found 20 items' and 'Ordered by date created'. A section titled 'Your to do list for this user' shows '1 events' and a report titled 'CO Educational Supervisor's Structured Report' created on 17 JUL, 2023. A section titled 'Events created in July 2023' lists 'Educational supervision report' (highlighted with an orange box) and another 'Educational supervision report' created on 19 JUL, 2023. The right sidebar contains 'Bookmarked searches' and 'Advanced search' filters for 'Event type', 'State', 'Date after', and 'Date before', with an 'Apply' button at the bottom.

STEP 29

Scroll to the section of the report that you completed and click on Edit

The screenshot shows a completed supervision report form. At the top, it says 'Section filled in by TestCOSI TestCOSI' and 'FILLED IN ON 19 JUL, 2023'. The form contains the following sections: 'Role: Educational Supervisor – Clinical Oncology', 'Specialty: Clinical oncology', and 'Locations: Test location'. Below this is a 'Summary of discussion with trainee' section. The 'Trainee successes during the period under review' section contains the text 'test'. The 'Suggested areas for development and recommendations for future training' section also contains the text 'test'. The 'Do you have any concerns about any aspect of the trainee's progress?' section contains the text 'No'. At the bottom left, there is a blue 'Edit' button with a pencil icon. At the bottom right, there is a 'Show less' link with an upward arrow.

STEP 30

You will be able to edit your comments and attach files

TT Section filled in by TestCOSI TestCOSI FILED IN ON 19 JUL 2023

Role: Educational Supervisor – Clinical Oncology
Speciality: Clinical oncology
Locations: Test location

Summary of discussion with trainee

Trainee successes during the period under review *

test

Suggested areas for development and recommendations for future training *

test

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

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

Do you have any concerns about any aspect of the trainee's progress? *

No

Note: these concerns may be external factors (e.g. training missed due to COVID-19) and do not necessarily imply any fault on the part of the trainee.

Attach files

Save Cancel

STEP 31

Click on Save to publish the edited report to the trainee's timeline

Do you have any concerns about any aspect of the trainee's progress? *

No

Note: these concerns may be external factors (e.g. training missed due to COVID-19) and do not necessarily imply any fault on the part of the trainee.

Attach files

Save Cancel

STEP 32

There is an option for the trainee to open up the supervisor's section of any report form

This is useful if you are completing the form during your meeting and don't want to log in to your e-portfolio account separately.

STEP 33

To use this option, the trainee should move the toggle under Fill in on the same device

This will open the supervisor's section. Once the supervisor's section has been submitted, you will receive an email to view the section and confirm that you are happy with the information in the form before the report is completed.

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 risr/advance account to fill in the next section. After typing at least 3 characters, we will suggest matches from known users in risr/advance. 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 *

STEP 34

Another way to use this feature is to ask the trainee to summarise the discussion that took place after your review meeting

This can be a good way of checking that they understand the feedback provided. You will be able to edit any of the information they enter in the supervisor section of the form.

