

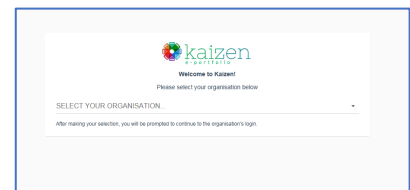
## Kaizen supervisor guide

Welcome to Kaizen, the eportfolio system.

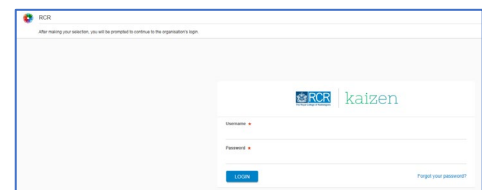
We have set up an account for you and you should have received your username and password.

### 1. Log in

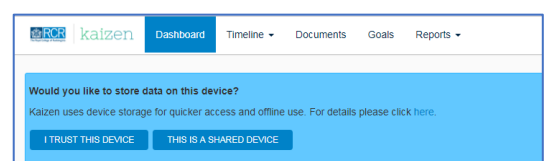
- The URL for the eportfolio is [www.kaizenep.com](http://www.kaizenep.com) which will take you to the Kaizen home page:



- Choose RCR from the selection list
- You will now be asked to login  
*(You can now re-select RCR in the top left-hand corner if you made a mistake on the previous step)*

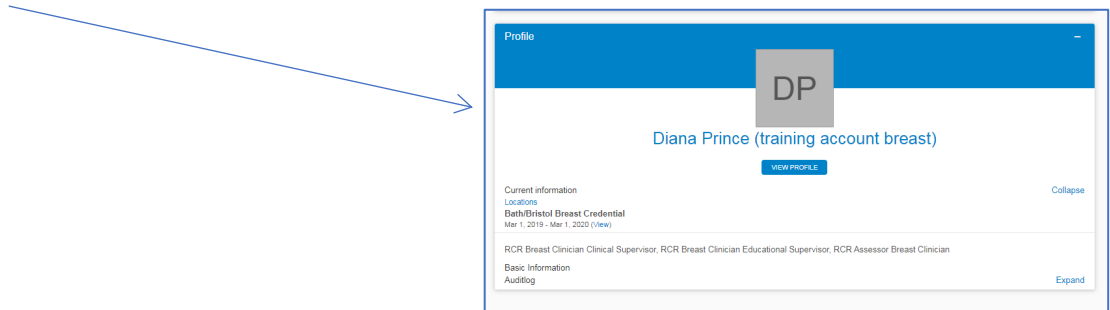


- Enter your username and password
- You will be guided to your dashboard
- You will be asked to confirm that you are happy to store data on that device. If you are using a shared device then we recommend you store the data temporarily. This will clear all Kaizen data when you logout.



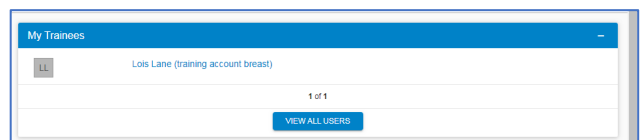


**2. Your role and location will show in your profile on the dashboard**



*This should have been set up for you when your account was created but please check it is correct and contact us if there is anything wrong*

**3. Your trainees will show on your dashboard under 'My Trainees'**



***It is the trainee's responsibility to assign you as their supervisor. If you cannot see your trainee it is because they have not assigned you***

# Assessment guide

This section will show you how an assessment is set up and:

- passed to you for completion or
- how to complete it with the trainee present

## 4. Setting up the assessment to send to an assessor

- The trainee will select the required assessment from the 'Assessments' section of their account

Assessment	
Breast Clinician CJD	Breast Clinician NSF
Breast Clinician MDTA	Breast Clinician QIPAT
Breast Clinician Mini-CEX	Breast Clinician Rad-DOPS
Breast Clinician Mini-IPX	Breast Clinician Teaching Observation

- They will enter an assessment date and a description if necessary

Fields marked with \* are required.

Date occurred on *	End date *
Aug 20, 2018	Aug 20, 2018

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)

- The trainee will complete the required sections eg. 'Case description' 'Clinical setting' using drop down lists where provided
- Trainees are now required to enter any comments they may have on the assessment before submission

Date of assessment \*

Year of training \*

Clinical Setting \*

Procedure Name \*

**Trainee Comments**

You should include comments on the assessment you have carried out, and your own performance, before you submit this request to your chosen assessor

Once your assessor has completed and submitted the assessment, it will be closed and placed into your timeline as complete.

Trainee's comments - comment on your performance and any actions required

- To choose an assessor, for the 'who would you like to fill in the next section' the trainee will:
  - Start typing in a name and the system will list anyone with a Kaizen account matching the search.
  - Or, if the person is not listed
  - Enter a valid email address

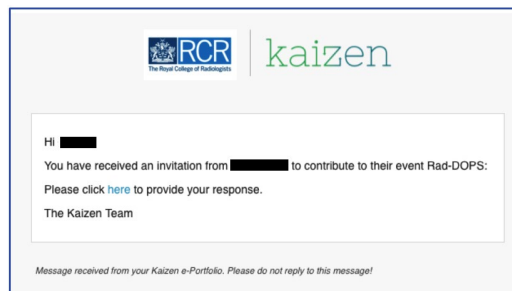
The next section of this form can be filled in by users with these roles: RCR Invited Assessor, RCR Assessor/Breast Clinician, RCR Breast Clinician Clinical Supervisor, RCR Breast Clinician Educational Supervisor

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

Start typing to search



- Click submit
- As an assessor, you will receive an email from *no-reply@kaizen.com*

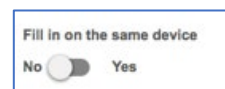


- You are not required to sign in to your account, the assessment will open in a stand-alone window
- Complete the assessment by selecting from the drop-down menus provided
- The assessment can be saved in draft format if required
- Once you complete and submit the assessment, it will be returned to the trainee's timeline
- This will complete the assessment task

### 5. Completing the assessment section with the trainee present

If a trainee is present, the assessment can be completed on the same device using the following steps:

- The trainee should be logged into their account
- The trainee should complete the steps shown previously down to the 'who would you like to fill in the next section'
- There is still a requirement to enter an assessor by typing in a name or entering an email address
- Click on the 'Fill in on the same device' slider



- The assessment questions will unpack below this section.

Fill in on the same device  
No  Yes

Assessor's registration number (GMC, NMC) \*

Assessor's Role \*

Clinical Setting \*

Procedure Name

Number of times this procedure previously performed by trainee \*

Difficulty of procedure \*

Assessor's comments

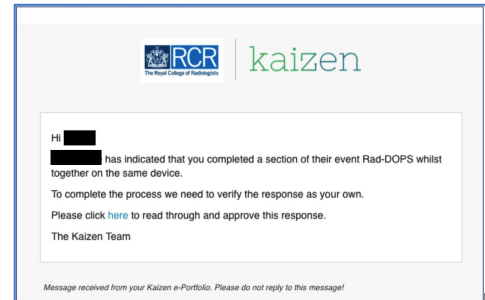
*The following questions could include these areas for feedback*  
*Demonstrates understanding of indication, anatomy and technique; explains risk/obtains consent, appropriate use of analgesia etc; usage of equipment; infection prevention/control; technical ability; seeks help; minimises use of ionising radiation; communication with patients/staff; quality of diagnostic images; judgement/insight; quality of report/procedure overall*

What went well? \*

What could have gone better? \*



- The assessor may now fill in the assessment on the same device. Once completed, click submit
- The assessment will be saved in draft by the system
- As an assessor, you will receive a confirmation email with a link to view the completed assessment and confirm that you agree the assessment



- Once the you confirm the assessment, it will be returned to the trainee's timeline
- This will complete the assessment task

## MSF guide

This section will show you how the trainee sets up the MSF and how to finalise the MSF assessment as an Educational Supervisor

*Please note: only the Educational Supervisor can finalise the MSF assessment and release the summary*

### 6. Completing the self-assessment section and sending to assessors

- Trainees will fill in the self-assessment section by selecting a rating for each question and adding any comments they wish to make
- They will choose a list of assessors, using the 'who would you like to fill in the next section'

The next section of this form has been designed to be completed by multiple people. Please indicate who you would like to invite using the boxes below. The minimum number of responses you must achieve is 12. Invitations can be sent now and also after this form has been submitted by returning to this page.

The next section of this form can be filled in by users with these roles: Anyone, RCR Invited Assessor, RCR Assessor Clinical Oncology, RCR Assessor Clinical Radiology, RCR AHP Assessor

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

STEPHEN FARRELL <SFARRELL@MAIL.COM> ✕ AMY MARKS <AMARKS@MAIL.COM> ✕ **Selecting the blue box will add them to the list of your chosen assessors here**

As you type a name here

It will appear here if the person has a Kaizen account

If the person does not appear, simply type in an email address for them and select it in the same way

Assessors without Kaizen accounts will show the email address as (new)

- Once they have added all the assessors required, they submit the MSF for sending to all assessors. **Further assessors can be added later, after sending the initial form.** This assessment will require a minimum of 12 assessors.

**The trainee MUST NOT send a separate MSF assessment to each assessor. All assessors should simply be listed in one MSF assessment. Sending individual forms to each assessor will not allow a final report to be gained. The software cannot merge MSF forms.**

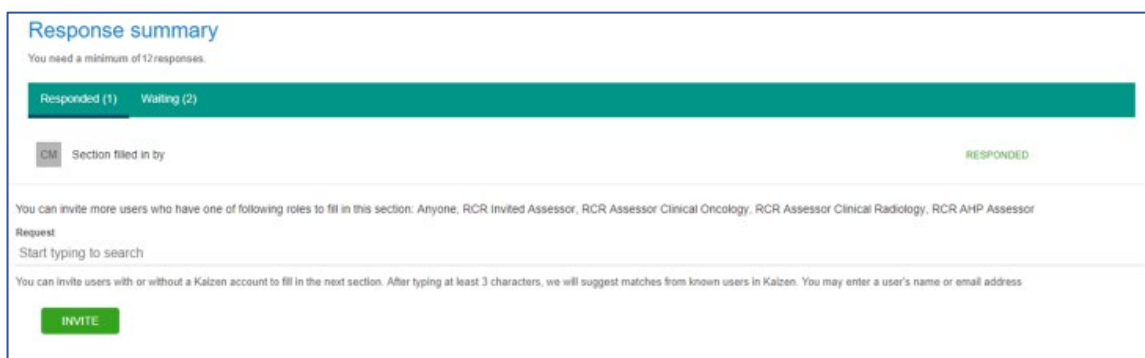
- The nominated assessor will receive an email from *no-reply@kaizen.com*



- The assessor will be taken to the assessment. They will see the trainee's self-assessment results
- They will then complete the assessment questions and submit their form
- The system will confirm their submission

## 7. Receiving completed assessments

- As responses begin to return, the trainee will see the count at the top of the MSF event. They will be able to see who has responded but not their response. Trainees can continue to invite more assessors at this stage.



**Response summary**  
You need a minimum of 12 responses.

Responded (1)    Waiting (2)

CM    Section filled in by    **RESPONDED**

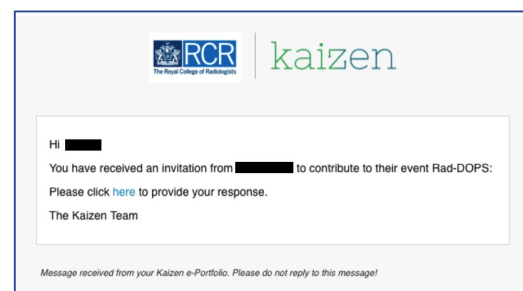
You can invite more users who have one of following roles to fill in this section: Anyone, RCR Invited Assessor, RCR Assessor Clinical Oncology, RCR Assessor Clinical Radiology, RCR AHP Assessor



Request  
Start typing to search

You can invite users with or without 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

**INVITE**

- Once the minimum required responses are received, the trainee will be able to close the assessment.
- Closing the assessment will stop any further submissions being recorded to this MSF. They can wait for further assessments to arrive beyond the minimum required if they would like more to be counted in the assessment.
- Once closed, the next step is for the trainee to send the completed assessment to you, their Educational Supervisor in order for you to review the feedback and discuss with your trainee before releasing it into their timeline
- As an Educational Supervisor, you will receive an email from *no-reply@kaizen.com* for you to access the MSF



 | 

Hi [redacted]

You have received an invitation from [redacted] to contribute to their event Rad-DOPS:  
Please click [here](#) to provide your response.

The Kaizen Team

Message received from your Kaizen e-Portfolio. Please do not reply to this message!

- To open the MSF, click on the 'fill in' button in blue at the top of the screen.

FILL IN  
Delete < Back

- You will have full view of all responses and be able to remove any inappropriate feedback. Each response will be listed in full and will have a 'Remove' button at the bottom. This will delete the entire response. You cannot edit the response in any way.

This section has responses from multiple users.

UB
Section filled in by Jen Brown
FILLED IN ON DEC 20, 2018

**Feedback**

Please provide feedback on the trainee

**How well do you think the trainee performed?**

test

REMOVE

Show less ^

---

**Instructions for supervisors**

Please check the responses that have been provided above. You can now edit or remove these responses if you believe anything is inappropriate and should not be viewed by the trainee.

Once you are happy please submit this form. This will generate the report to be shown to the trainee.

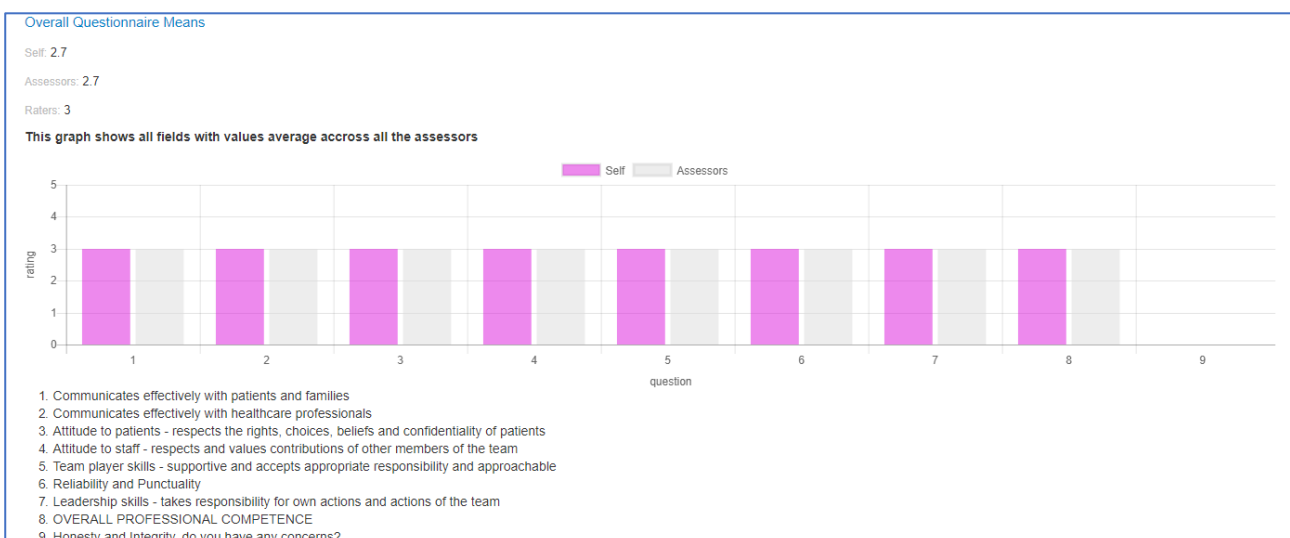
**Please confirm you are now happy for the report to be released to the trainee ★**

ATTACH FILES

- Once complete and discussed, you can then release the summary back to your trainee's timeline by submitting the summary.
- Click submit

SUBMIT

- They will then be able to see all of the responses. Their self-assessment scores will be shown in a graph alongside the average scores from the combined assessors.







- The trainee's comments will be listed alongside the assessment comments. These will be randomised so will not be attributable to any single assessor.

Communicates effectively with patients and families

Self assessment:

- Tester

Assessors:

- text
- Test Response 2
- Test Response 1

Communicates effectively with healthcare professionals

Self assessment:

- Tester

Assessors:

- Test Response 1
- text
- Test Response 2

Attitude to patients Respects the rights, choices, beliefs and confidentiality of patients

Self assessment:

- Tester

Assessors:

- Test Response 1
- text
- Test Response 2

Attitude to staff Respects and values contributions of other members of the team

Self assessment:

- Tester

Assessors:

- Test Response 1
- text
- Test Response 2

Team player skills Supportive and accepts appropriate responsibility; Approachable

Self assessment:

- Tester

Assessors:

- Test Response 2
- Test Response 1
- text

# Appraisal guide

This section will show you how to :  
*submit the appraisal form*

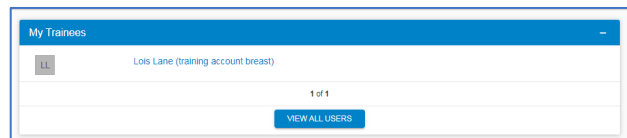
**Also:** currently only trainees can create the clinical supervisor appraisals. If you are a clinical supervisor you will not have the option to create these for the trainee.  
For educational supervisor appraisals, the educational supervisor must create these. The trainee will not have the option to

- set up an Educational Supervisor appraisal for a trainee
- how to complete a Clinical Supervisor appraisal created by a trainee

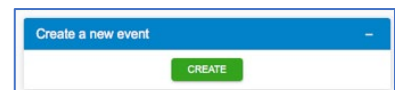
**Please note:** The trainee will need to have assigned you as their Educational Supervisor for you to create and create these

## 8. Setting up an Educational Supervisor appraisal for a trainee

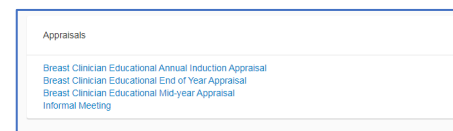
- Select the trainee from your account dashboard



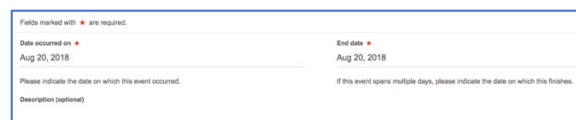
- This will take you through to the trainee's account. Select the 'create' button



- Select the appropriate from the 'Appraisals' section



- Enter an appraisal date. You can also add a description, if you wish





- Complete the sections in the appraisal form. Most of the sections are free text

Example taken from  
*Annual Induction  
Appraisal*

Meeting Date \*

Educational Supervisor

Are there any induction considerations to be taken into account?

Learning Objectives

Evidence

What learning methods will be used?

Date of next meeting

ATTACH FILES

- Click submit or save as draft until agreed and completed

SUBMIT

Save as draft

- The submitted form will be saved to the trainee's timeline

### 9. Setting up the appraisal to send to a Clinical Supervisor

- The trainee will select the required appraisal from the 'Appraisal' section of their account

Appraisals

- Breast Clinician Clinical End of Element Appraisal
- Breast Clinician Clinical Initial/Induction Element Appraisal
- Breast Clinician Clinical Supervisor Mid Element Appraisal
- Informal Meeting

- They will enter an appraisal date. They can also add a description, if they wish

Fields marked with \* are required.

Date occurred on \* Aug 20, 2018

End date \* Aug 20, 2018

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)

- The trainee will add the name of their clinical supervisor
- The trainee will embed their PDP into the appraisal form using the 'generate report' feature
- The report will embed the Category, Learning Objectives and Date of Completion within the form. Dates can be amended using the 'Change Report Inputs' button

PDP Objective Summary

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

Collection of objectives from PDP

Found 2 items. Showing 1 to 2 rows

Category	Learning Objectives	Expected date of completion
Communication	1. Test 2. Test 2.3. Test 3	30 Dec 2018
Management and leadership	a. Test 1 b. Test 2 c. Test 3	31 Dec 2018

CHANGE REPORT INPUTS



- Further objectives can be added (*currently a max of 5*) to the appraisal, select the 'Type' from the drop-down box of Objective 1

Further objectives to be addressed during this element attachment (include generic objectives and specialty-specific objectives as defined by the curriculum) Additional objectives will unpack and be available once each objective is created.

Objective 1

Type

Capabilities in practice (CiPs)  
Presentations  
Conditions  
Practical procedures

Completion Date set

Date achieved

- Details are entered as required. Once a completion date is set, the next objective will unpack, ready for further completion

Objective 1

Type

Capabilities in practice (CiPs)

Objective 1 Description

Test text

Evidence of completion

Test text

Completion Date set

Sep 19, 2019

Date achieved

Sep 19, 2019

Objective 2

Type

Objective 2 Description

Evidence of completion

Completion Date set

Date achieved

- Once the objectives have been entered, the appraisal will be submitted to you as their Clinical Supervisor for comment and completion

### 10. Completing the appraisal with the trainee present

If the trainee is present and they wish to complete the appraisal on the same device, the following steps will allow this:

- The trainee will complete the steps shown previously down to the 'who would you like to fill in the next section'. There is still a requirement for the trainee to enter the supervisor's details by starting to type their name
- Click on the 'Fill in on the same device' slider

Fill in on the same device

No  Yes

- The supervisor comment section of the appraisal will unpack below this section.

A screenshot of a web form. At the top, it says "Fill in on the same device" with a radio button for "No" and a selected radio button for "Yes". Below this is a blue bar with the text "By continuing, you will invite the following users to fill in the next section: dprince@mail.com". Underneath is a text area for "Supervisor comments - comment on performance and any action required" with a red asterisk indicating it is required. At the bottom left of the form is a button labeled "ATTACH FILES".

- You may now fill in the appraisal on the same device. Once completed, click submit



- The appraisal will be saved in draft by the system
- As a Clinical Supervisor, you will receive a confirmation email with a link to view the completed appraisal and confirm that you agree the appraisal
- Once the you confirm the appraisal, it will be returned to the trainee's timeline
- This will complete the appraisal task

*The mid-point and the end of element appraisal follow the steps above*