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 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
4. Setting up the assessment to send to an assessor

- The trainee will select the required assessment from the ‘Assessments’ section of their account
- They will enter an assessment date and a description if necessary
- 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
- 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
• 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.
• 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
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’

- 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.

• 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

• To open the MSF, click on the ‘fill in’ button in blue at the top of the screen.
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.

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

Click 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.
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

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

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

Example taken from Annual Induction Appraisal

- Click submit or save as draft until agreed and completed
- 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
- They will enter an appraisal date. They can also add a description, if they wish
- 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
• Further objectives can be added (currently a max of 5) to the appraisal, select the ‘Type’ from the drop-down box of Objective 1

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

• 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

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