

Kaizen trainee guide

Welcome to Kaizen, the eportfolio system.

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

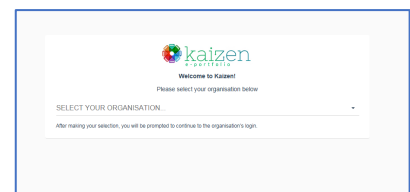
Follow the steps below to get started.

In order to set the system up for your use and to ensure that our information is correct, Please take a few minutes to carry out the steps detailed on the following pages:

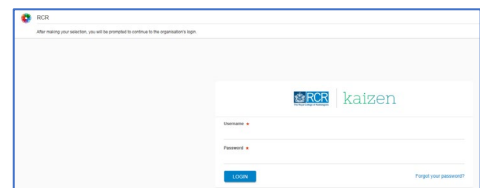
- Enter your Element Attachment and Clinical Supervisor
- Assign your Educational Supervisor

1. Log in

- The URL for the eportfolio is www.kaizenep.com which will take you to the Kaizen home page:



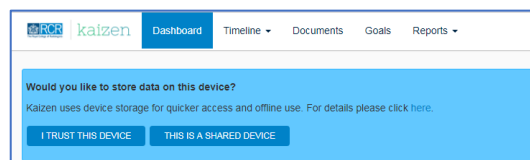
- Choose RCR from the selection list
- You will now be asked to login
(You can now re-select RCR in the top left-hand corner if you made a mistake on the previous step)



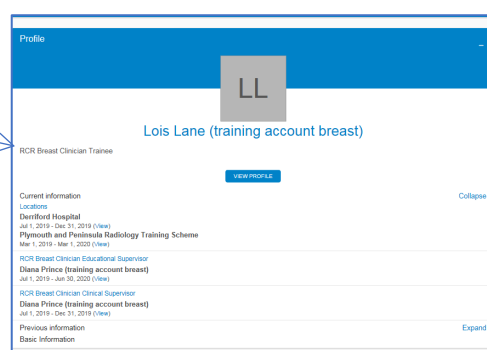
- Enter your username and password
- You will be guided to your dashboard



- 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, training location and supervisors will all show in your profile on the dashboard



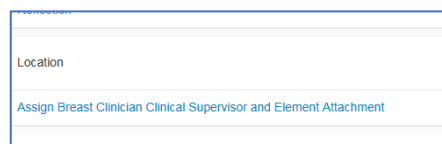
This should have been set up for you when your account was created but please check it is correct and contact us if there is anything wrong. If we have been told who your educational supervisor is this will also have been set up and your account will be linked to theirs

3. Assigning your clinical supervisor and element attachment

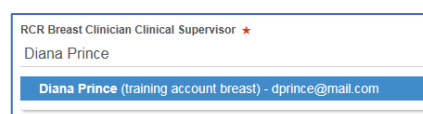
- From your dashboard, select the 'create' button



- Under Location select "Assign Breast Clinician Clinical Supervisor and Element Attachment"



- Complete the form ensuring you select appropriate start and end dates
- For grade select "SAS" and for "Main purpose of attachment" select the most appropriate option from the drop down list.
- Type the name of your Clinical Supervisor. Their name should appear as part of a list of supervisors, click on the name to select them.



If your supervisor's name does not appear it means they do not yet have a Kaizen account. Please contact us and we will create an account for them.



- Click submit

4. Assigning an additional Clinical Supervisor

- If you have more than one clinical supervisor you can assign them using the ‘Assign Additional Breast Clinician Clinical Supervisor’

- Complete the form ensuring you select appropriate start and end dates
- Type the name of your Clinical Supervisor and click on the name to select them.

5. Assigning your Educational Supervisor

If we have been told who your educational supervisor is this will have already been set up for you. However, if your educational supervisor should change during your training you can assign them using the following steps:

- From your dashboard, select the ‘create’ button

- Select ‘Assign Breast Clinician Educational Supervisor’ from the Supervision section

- Enter a start and end date for their period as your supervisor. This can be any period from 1 month to 5 years
- Type the name of your Educational Supervisor. Their name should appear as part of a list of supervisors, click on the name to select them.

- *As with the clinical supervisor if your educational supervisor’s name does not appear it means they do not yet have a Kaizen account. Please contact us and we will create an account for them.*
- Click submit



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

- The current Information section of your dashboard should now look similar to this:

| Locations |
|--|
| Bristol Breast Care Centre, Southmead Hospital Jul 1, 2019 - Dec 31, 2019 (View) |
| Bath/Bristol Breast Credential Mar 1, 2019 - Mar 1, 2020 (View) |
| RCR Breast Clinician Educational Supervisor Diana Prince (training account breast) Jul 1, 2019 - Jun 30, 2020 (View) |
| RCR Breast Clinician Clinical Supervisor Diana Prince (training account breast) Jul 1, 2019 - Dec 31, 2019 (View) |

- Your account is now ready to use

Assessment guide

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

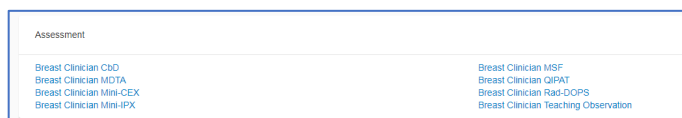
- Send it to an assessor or
- Complete it with your assessor present

6. Setting up the assessment to send to an assessor

- From your dashboard, select the 'create' button or use the + sign from your toolbar



- Select required assessment from the 'Assessments' section



- Enter an assessment date. You can enter an end date if the assessment is over a period
- You can enter a description if you wish.

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) | |

7. Completing the assessment section, ready to send to your assessor

- Fill in the sections eg. 'Case description' 'Clinical setting' using drop down lists where provided
- You are now required to enter any comments you may have on the assessment you have undertaken before submission to an assessor

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, use the ‘who would you like to fill in the next section’ and either
 - Start typing in a name and the system will list anyone with a Kaizen account matching your search. Click on the name to select them as the assessorOr, if the person is not listed
 - Enter a valid email address

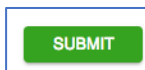
The assessor does not need to have a Kaizen account to complete an assessment for you

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

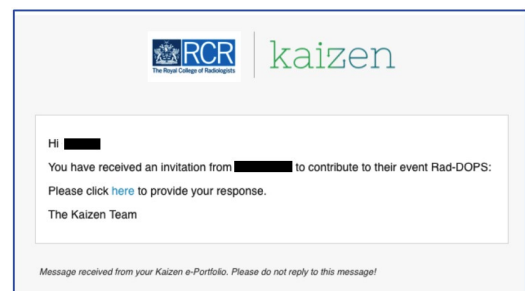
Who would you like to fill in the next section of this form? *

Start typing to search

- Click submit



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



- Once the assessor completes and submits the assessment, it will be returned to your timeline.
- This will complete the assessment task.

8. Completing the assessment section with the assessor present

- If an assessor is present and they wish to complete the assessment on the same device, the following steps will allow this:
- 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 the assessor’s details by:
 - Start typing in a name and the system will list anyone with a Kaizen account matching your search.
 - Or, If the person is not listed enter a valid email address
- Click on the ‘Fill in on the same device’ slider

Fill in on the same device

No Yes

- 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 *

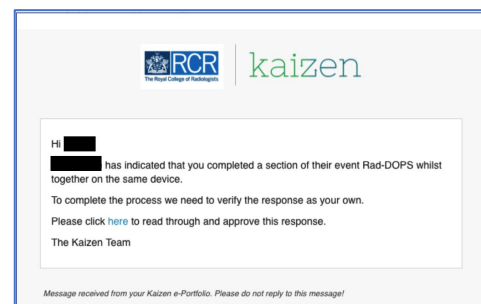
Assessor's comments

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
- The assessor will receive a confirmation email with a link to view the completed assessment and confirm that they agree the assessment



- Once the assessor confirms the assessment, it will be returned to your timeline
- This will complete the assessment task

MSF guide

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

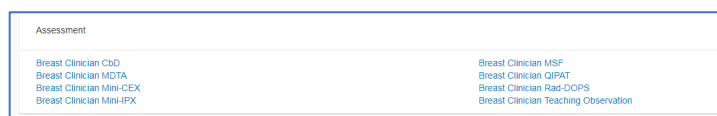
- Send it to assessors
- Finalise the assessment with your Educational Supervisor

9. Setting up the MSF assessment to send to assessors

- From your dashboard, select the 'create' button or use the + sign from your toolbar



- Select MSF from the Assessments section



- Enter an assessment date. You can enter an end date if the assessment is over a period.
- You can enter a description if you wish.

10. Completing the self-assessment section and sending to your assessors

- Fill in the self-assessment section by selecting a rating for yourself for each question and add any comments
- To choose your list of assessors, use the 'who would you like to fill in the next section' and either:
 - Start typing in a name and the system will list anyone with a Kaizen account matching your search
 - Or, if the person is not listed enter a valid email address

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> x AMY MARKS <AMARKS@MAIL.COM> x

Selecting the blue box will add them to the list of your chosen assessors here

As you type a name here claire key

It will appear here if the person has a Kaizen account

Claire Key <ckey@mail.com>

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

kaizen@rcr.ac.uk

<kaizen@rcr.ac.uk> (new)

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



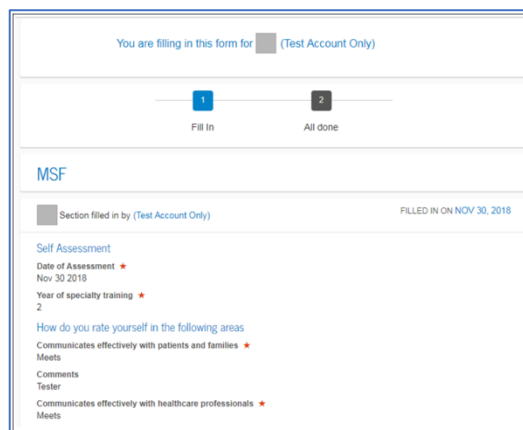
- Select the email address as shown above to register it on the form. Keep adding assessors until you have the number you require.
- Once you have added all the assessors you require, you can submit the MSF for sending to all of your assessors. **Further assessors can be added later, after you have sent the initial form.**
You will require a minimum of 12 assessors

DO NOT send a separate MSF assessment to each assessor. Simply list all assessors in one MSF assessment and send this. Sending individual forms to each assessor will not allow you to gain a final report. The software cannot merge MSF forms.

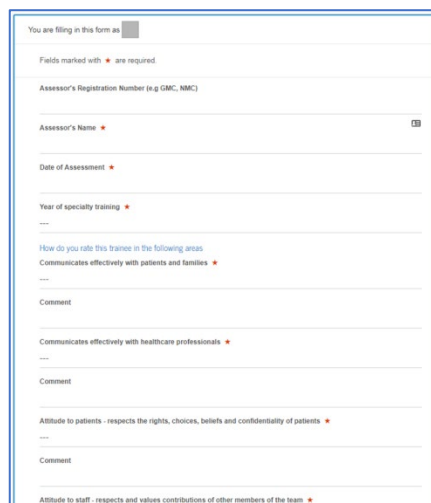
- The nominated assessor/s will receive an email from *no-reply@kaizen.com*



- The assessor will be taken to the assessment. They will see your self-assessment results.



- They will then complete the assessment questions and submit their form.





- The system will confirm their submission.

11. Receiving completed assessments

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

- Once the minimum required responses are received, you will be able to close the assessment
- Closing the assessment will stop any further submissions being recorded to this MSF. You can wait for further assessments to arrive beyond your minimum required if you would like more to be counted in the assessment
- Once closed, you will be able to send the completed assessment to your educational supervisor in order for them to review the feedback and discuss with you before releasing it into your timeline.

- Your educational supervisor will have full view of all responses and be able to remove any inappropriate feedback. Once complete they will release the summary back to your timeline.



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



- Your comments will be listed alongside your self-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

Logbook guide

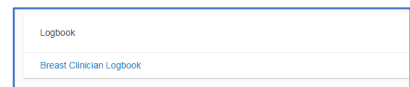
This section will show you how to add a logbook entry

12. Adding a logbook entry

- From your dashboard, select the 'create' button or use the + sign from your toolbar



- Select 'Breast Clinician Logbook' from the logbook section



- Enter a logbook entry date. You can enter an end date if the logbook entries are over a period
- Fill in the sections eg. 'Examination', 'CiP' using drop down lists where provided
- When the sections are completed you can add a comment if you wish
- Click 'submit' to save the entry



Appraisal guide

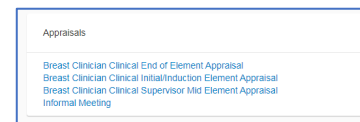
This section will show you how to set up an appraisal and:

- Send it to a Clinical Supervisor or
- Complete it with your Clinical Supervisor present

Please note: currently only trainees can create the Clinical Supervisor appraisals. Your Clinical Supervisor will not have the option to create these for the trainee.

For Educational Supervisor appraisals, the Educational Supervisor must create these. You will not have the option to create these as a trainee

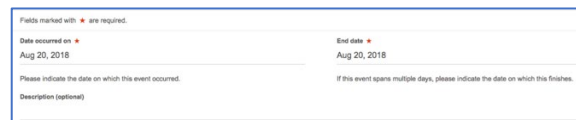
- Select the required appraisal from the 'Appraisal' section of your account



Appraisals

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

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



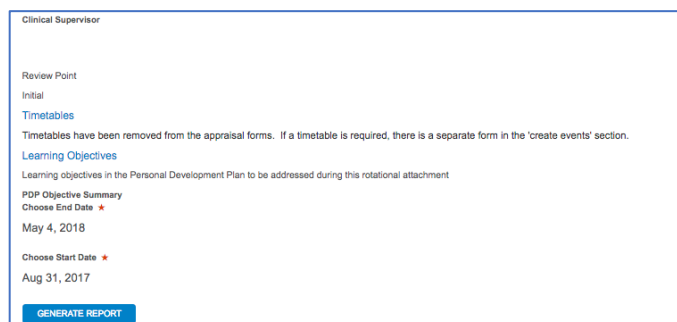
Fields marked with * are required.

Date occurred on * End date *

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)

- Add the name of your clinical supervisor
- You will need to ensure that you have created and saved a PDP so the information from this can be embedded into the appraisal using the 'generate report' feature
- Choose and end and start date to encompass the period when the PDP was created and select the blue 'Generate Report' button



Clinical Supervisor

Review Point

Initial

[Timetables](#)

Timetables have been removed from the appraisal forms. If a timetable is required, there is a separate form in the 'create events' section.

[Learning Objectives](#)

Learning objectives in the Personal Development Plan to be addressed during this rotational attachment

PDP Objective Summary

Choose End Date *

Choose Start Date *



- 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

- To add further objectives (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

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 should then be passed to the clinical supervisor for comment and completion. To choose your supervisor, start typing in their name in the 'who would you like to fill in the next section'. Click on the name to select them as your supervisor.

In order to complete the appraisal, it will now need to be finalised by your supervisor. You can submit the form to them by clicking submit or open below and complete on this system. You will still need to add your supervisor's name or email address to carry out either of these actions.

ATTACH FILES

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

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

Diana Prince (training account breast) <dprince@mail.com>

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

- Click submit

You will need to ensure that the clinical supervisor that you want to complete the appraisal is already assigned as your clinical supervisor. The appraisal will not send to a supervisor that is not assigned to you.

14. Completing the appraisal with the supervisor present

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

- 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 the supervisor's details by starting to type their name and clicking on them to select them as your supervisor
- 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.

Fill in on the same device

No Yes

By continuing, you will invite the following users to fill in the next section: dprince@mail.com

Supervisor comments - comment on performance and any action required *

ATTACH FILES

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

- The appraisal will be saved in draft by the system
- The supervisor will receive a confirmation email with a link to view the completed appraisal and confirm that they agree the completion. Once the supervisor confirms the appraisal, it will be returned to the trainee's timeline. This will complete the appraisal event

To create the mid-point and the end of element appraisal follow the steps above