RCOG Webinar - Preparing for and conducting ARCPs and External Subspecialty Assessments through the RCOG Training ePortfolio

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1. <u>Educational Supervisor's Report (ESR) and Subspecialty ESR (SST ESR) creation and completion</u>

The trainee's ESR/SST ESR can be initially created by the trainee themselves <u>or</u> their assigned Educational Supervisor, College Tutor, STPS/DSTPS, TPD or regional Head of School.

Accessing draft/completed ESR/SST ESR forms

1. On your ePortfolio dashboard, scroll down to the block entitled "Annual Educational Supervisor Report" (ESR) or "Annual Subspecialty Educational Supervisor Report" (SST ESR)
2. Click "View all Annual Educational Supervisor Reports" (ESR) or "View all Annual Subspecialty Educational Supervisor Reports" (SST ESR).
3. Click "Edit" next to the relevant ESR/SST ESR, and you will be taken into the form. If you click on the title of the form this will open in "View" mode.
4. ESRs/SST ESRs are also accessible by the relevant roles through the "ESR"/"SST ESR" blocks on the trainee's profile page. Accessing the ESR through the trainee's profile also indicates the date the form was created and the stage of the workflow that the ESR/SST ESR is currently at.

Creating the ESR/SST ESR

N.B. Before creating the ESR/SST ESR, please ensure that the trainee/trainer has completed all required CiP assessments for the trainee's current training year. Draft ESR/SST ESR forms will not auto-populate with any CiP assessments that are subsequently completed.

1. Log in to your RCOG ePortfolio account
2. On your ePortfolio dashboard, scroll down to the block entitled "Annual Educational Supervisor Report" (ESR) or "Annual Subspecialty Educational Supervisor Report" (SST ESR)
3. Click "Create Annual Educational Supervisor Report" (ESR) or "Create Annual Subspecialty Educational Supervisor Report" (SST ESR)
4. **Educational Supervisor/College Tutor/STPS/DSTPS/TPD/HoS only** – on the next page, select the name of the relevant trainee from the "Trainee" drop-down. This option will appear greyed out for Trainees because they can only create an ESR for themselves, whereas Educational Supervisors will likely have multiple trainees to supervise.
5. Select the trainee's grade from the "Grade" drop-down. This will allow only the CiP Assessments for the specified training grade to populate on the ESR.
6. It is possible to add the "Date of Last ARCP/Training Start Date" at this stage, however, we recommend that this field is left blank as inputting the wrong date will restrict the full range of evidence from populating the ESR/SST ESR.
7. Click "Continue", and you will be taken into the ESR/SST ESR

Deleting Draft ESR

It is now possible for the trainee to delete draft ESRs or SST ESRs while they are in the very first stage of the workflow. This is especially useful if two reports have been created in error or if a report has been generated with the wrong post grade.

Clicking the “Delete” button on the draft report as the Trainee or as the Educational Supervisor will generate a confirmation message.

Please note that once the draft is deleted, there is no way to retrieve it. As a trainer, if you wish to delete any draft ESR or SST ESR forms, we strongly recommend you confirm with your trainee before proceeding with this.

Navigating the ESR/SST ESR

1. To navigate through the ESR/SST ESR, click on the relevant section on the side block
2. The form may be saved at any time by scrolling to the bottom of each section and clicking “Save”, so you can return to it
3. A checkbox is available next to the Save button which **you should only use to indicate when you have completed your sections, and finally to mark the form as complete** - the checkbox will only be clickable if you are viewing the form in the role required to sign-off a section

Section 1 - General

1. For all fields with a date selection, e.g. “**Date of meeting**”, click on the calendar icon to open the date-picker
2. **Please ensure** that the relevant supervisor’s name is entered under “**Educational Supervisor**” – begin typing their surname, and they will appear for selection. All consultants who have active Educational Supervisor roles should appear in the list

   N.B. If the trainee’s supervisor cannot be located, please contact ePortfolio@rcog.org.uk for assistance.

3. Complete all other relevant fields
4. **To move on to the next area of the form, scroll back up to the side block and select the relevant section**

Section 2 – CiPs & Procedure summary/SST capabilities in practice

1. The “**CiP assessments**” field should automatically populate with all of the CiP assessments that have been completed by the trainee’s Educational Supervisor for their **current training year** – if these do not appear:
    i. Exit the ESR without saving
    ii. Follow the quick start guide on “CiP assessment”, accessible on the RCOG website here
    iii. Once completed, go back and follow the guidance under “Creating the ESR” in this guide
    iv. The completed CiP Assessments should now appear
2. The “**Subspecialty recommended outcome**” section (**ESR only**) will display the outcome from the trainee’s last External Subspecialty Assessors Report (if applicable)
3. The “**Procedure summary**” section displays all procedures for the 2019 Core Curriculum (ESR)/Subspecialty curricula (SST ESR) - you can click on “**View items**” to view a list of the trainee’s completed Summative and Formative OSATS for each procedure
4. **To move on to the next area of the form, scroll back up to the side block and select the relevant section**

Section 3 – Matrix requirements/Summary reports

The “**Matrix requirements**” section (ESR) displays all other requirements from the RCOG’s Matrix of Progression for the 2019 Core Curriculum. The “**Summary reports**” section displays all assessments and log entries relevant to a trainee’s Subspecialty training.

1. Under “Matrix summary”, click the arrow next to each item to view the relevant fields
2. Clicking on “Link assessment” or “Select log entries” will open a pop-up window, displaying all assessments or log entries (as appropriate)
3. You should tick the box next to each relevant item, then select “Link”
4. The selected assessments/log entries will then be linked to and accessible through the ESR
5. Due to recent developments, it is now possible to delete evidence from Section 3 – Matrix Requirements if it has been linked in error. Simply select the blue “Remove” button next to the evidence you wish to unlink.
6. You should then click either Yes or No to indicate whether the trainee has met the matrix requirements for each item for their current training year
7. Once you have completed each of the fields, you will need to ensure that the “**Matrix requirements met**” box at the foot indicates whether or not the trainee has met all of the Matrix of Progression requirements for that training year
8. **To move on to the next area of the form, scroll back up to the side block and select the relevant section**

Section 4 – Revalidation (ESR only)

5. **The trainee** must first ensure that they have completed all of their sections of the ESR, before completing the fields in the revalidation section
6. Once the **trainee** has completed the applicable Revalidation fields, they should then select "**Are all the trainee fields in the revalidation section and the global judgement section complete**?" at the foot of the page then click "Save"
7. The assigned **Educational Supervisor** should then access the form, following the guidance under "Accessing draft/completed ESR forms" in this guide – if the supervisor cannot access the form, please contact ePortfolio@rcog.org.uk
8. The **Educational Supervisor** should then complete the relevant fields of the Revalidation section
9. **To move on to the next area of the form, scroll back up to the side block and select the relevant section**

Section 5 (Section 4 on SST ESR) – Global judgement

10. Under "**Educational Supervisor statement**"/"**Subspecialty Educational Supervisor statement**", the assigned **Educational Supervisor** (specified in step 14) should click each box for **Parts A, B and D**, to indicate whether they feel the trainee is progressing satisfactorily - if they do not feel the trainee is progressing satisfactorily, they must indicate why in the free text box
11. **Part C** of the section also allows the **Educational Supervisor** to enter "**Future recommendations for next year or for handover to new ES**"
12. Once the **Educational Supervisor** has completed the applicable Global judgement fields, they should then select "**Are all the supervisor fields in the revalidation section and the global judgement section complete**?" at the foot of the page then click "Save"
13. The **trainee** should then access the form, following the guidance under "Accessing draft/completed ESR/SST ESR forms" in this guide – if the trainee cannot access the form, please contact ePortfolio@rcog.org.uk
14. The **trainee** should then complete the "**Trainee feedback**" area of the Global judgement section, to indicate whether they agree with the supervisor's recommendation - if they do not, they must indicate why in the free text box

Once the **trainee** has completed the applicable feedback fields, they should then select "**Has the trainee given feedback?**" at the foot of the page, then click "Save" – **the ESR/SST ESR will then be marked as complete and can no longer be edited.**

2. Deanery Administrators – setting up ARCP panels

Creating panels

1. Log in to the new RCOG Training ePortfolio through https://training.rcog.org.uk/
2. From your dashboard, scroll down to the "ARCP and Subspecialty Assessment panels" block
3. Select "Create ARCP Panel"
4. Under "ARCP Panel name", enter some text that will help you to easily identify the panel. As the panels will be organized in alphabetical order, it would be beneficial to standardize the naming convention, e.g. South London ARCP Panel 1 20/10/2019
5. Leave the "SST" box unticked – Subspecialty External Assessors Report panels are created by RCOG Administrators
6. Click "Create Panel"

Locating panel members

1. To add members to an existing panel, click "Add member"
2. Search for the user under "Member name", using their surname, then select them from the dropdown menu. This will present you with a list of all the ePortfolio account holders in your training programme. It is now possible to add users to panels based on their GMC number also.
3. Under "Role", select the role of the user in the panel, e.g. Panel Chair. Please note that users who hold Trainee accounts cannot be given the Panel Member role. If one of the panel members still has a Trainee account, they will need to contact ePortfolio@rcog.org.uk and request the setup of Educational Supervisor permissions
4. Click "Add member"

Adding non-O&G panel members, e.g. lay representatives

1. Refer to the "Add ARCP: Group Membership" page, then click the "Add Observer" button
2. On the "Invite ARCP Observer" page, fill in the details for the lay representative, including their forename, surname, and email address.
3. Check to ensure that the details have been entered correctly then select "Invite Observer"
4. Alternatively, if you wish to add a lay representative who already exists on the ePortfolio, note that they will not appear through the "Add Observer" feature as they will already have been invited to the ePortfolio for a previous panel. They can instead be added using the "Add Member" function and can be found by typing in their email address.

Creating draft forms

1. Once all members have been added to the panel, click “Create one” to the right of a trainee’s name
2. Under “Deanery”, select the relevant Deanery
3. Under “ARCP”, select the name of the relevant panel
4. Under “Trainee”, select the trainee’s name – **N.B. if a trainee cannot be located, please contact** ePortfolio@rcog.org.uk
5. Select “Continue”
6. To ensure that you are creating a **draft** form, scroll down to the bottom of the form and deselect the “Completed” field
7. Complete all areas of the form as required then, when complete, click “Save”
8. You will receive a message that the form has been saved
9. Return to the Panel Members page, which will now display a draft outcome form has been created for the trainee you have selected. This will be indicated as either (Draft) or (Complete)
10. Clicking on the link to the form will allow you to return to the draft ARCP form you have created and input any adjustments. If required, the form can now be marked as “Complete”, which will prevent any further alterations and will make the form visible to the trainee
11. Once the form is Complete, a link will appear in the Panel Members section, revealing the ESR Feedback form

Editing/deleting existing panels and/or panel members

1. Select “My Panels” from your ePortfolio dashboard
2. **To edit a panel name**
    - **a.** Select “My Panels” from your ePortfolio dashboard
    - **b.** To the right of the relevant panel name, click the downward-pointing arrow next to “Add member”
    - **c.** Click “Edit”
    - **d.** Under “panel name”, adjust the name of the panel as required
    - **e.** Click “Save”
    - **f.** You will receive confirmation that the panel name has been changed

3. **To edit a panel member’s permissions:**
    - **a.** Select “My Panels” from your ePortfolio dashboard
    - **b.** To the right of the relevant panel name (in the “Operations” column), click the downward-pointing arrow next to “Add member”
    - **c.** Click “Edit member”
    - **d.** Tick the relevant role you wish to assign or deselect the role you wish to remove
    - **e.** You will receive confirmation that the attendee’s role has been amended

4. **To delete a panel**
    - **a.** Select “My Panels” from your ePortfolio dashboard
    - **b.** To the right of the relevant panel name, click the downward-pointing arrow next to “Add member”
    - **c.** Click “Delete”
    - **d.** On the next page, click “Delete” again
    - **e.** You will receive confirmation that the panel has been deleted

N.B. Completed ARCP forms will remain accessible to the trainee and all associated trainers through the trainee's profile page. You can still edit a report even if the panel has been deleted.

We do also encourage the regular deletion of outdated panels for housekeeping purposes. Deleting old panels will prevent your list of panels from becoming cluttered and will not delete the ARCP form for the trainee.
If all trainee outcome forms have been completed for a panel, the panel should then be removed

5. **To delete a panel member**
    - **a.** Select “My Panels” from your ePortfolio dashboard
    - **b.** To the right of the relevant panel name, click the downward-pointing arrow next to “Add member”
    - **c.** Click “Edit”
    - **d.** On the next page, click “Members”
    - **e.** To the right of the relevant member name, click the downward-pointing arrow next to “View member”
    - **f.** Click “Remove member”
    - **g.** On the next page, click “Delete”
    - **h.** You will receive confirmation that the panel member has been removed

3. <u>ARCP/External Subspecialty Assessment Panel Chairs/Members</u>

Accessing a trainee's profile, completed ESRs and previous (NES) ePortfolio evidence

1. On the ePortfolio dashboard, select "My Panels" from the "ARCP and Subspecialty Assessment panels" block
2. Select the relevant panel under "Panel name" – you will then be shown the list of panel members
3. Clicking on a trainee's name will then take the user through to that trainee's profile page
4. Any ESRs / SST ESRs for the trainee will be visible under the "ESR" and "SST ESR" headings, and accessible through the hyperlinked titles
5. The ZIP file of the trainee's evidence from the previous (NES) ePortfolio will be accessible by clicking the link entitled "File archive from NES" at the foot of the page – N.B. if the trainee's file is not visible, they will need to:
    a. Go to **Profile > Edit** on their ePortfolio
    b. Scroll down to "Files migrated from NES ePortfolio"
    c. Tick the box entitled "Archive file permission"
    d. Click "Save"
    e. This will then enable you to view the file.

Viewing trainee curriculum progress and evidence links

1. On the ePortfolio dashboard, select "My Panels" from the "ARCP and Subspecialty Assessment panels" block
2. Select the relevant panel under "Panel name" – you will then be shown the list of panel members
3. Clicking on a trainee's name will take the user through to that trainee's account profile page
4. Scroll down and click "View progress" – this will take you to the trainee's Curricula page
5. Click on the relevant Professional Identity, e.g. Clinical Expert
6. Click on the relevant CiP, e.g. Non-emergency gynaecology and early pregnancy
7. Click on the relevant Key Skill, e.g. Manages subfertility
8. You can then click on the blue title of an evidence entry to view it

Accessing trainee assessments, log entries and evidence

Accessing the "Search" page

1. Once you have logged into your ePortfolio account, click the horizontal bars in the top-right of the page to access the menu
2. Select "Search"

Locating the required trainee – use one of the methods outlined below

Method 1 - "Search by trainee" search field

1. Type the trainee's surname or GMC number into the box, and they will appear for selection
2. Select the trainee's name, then click "Search"
3. All items for the selected trainee will then appear and can be filtered as outlined in **Filtering a trainee's work**

Method 2 – "Trainee" filter

1. Under "Filters", click "Trainee"
2. This will drop down to display all trainees from your active ARCP panels, along with any other trainee with whom you are associated, e.g. as their assigned Educational Supervisor, College Tutor, etc. – **N.B.** only trainees who have completed WPBAs and/or log entries will appear in this list
3. Select the relevant trainee(s)
4. All items for the selected trainee(s) will then appear and can be filtered as outlined in **Filtering a trainee's work**

Filtering a trainee's work

Assessments

1. Under "Filters", click "Assessment type"
2. This will drop down to display each type of assessment, along with the number of each completed by your selected trainee(s)
3. Select one or more assessment type from this list – the relevant items will then appear for your selected trainee(s), to the right of the "Filters" bar
4. It is then possible to apply additional filters to narrow-down the assessments that display, e.g. by training grade
5. The relevant Assessments will appear to the right of the "Filters" bar in chronological order, most recent first
6. All necessary details for the assessment should be displayed, but it possible for you to view the full assessment by clicking "Read more" under the relevant entry

Log entries

1. Under “Filters”, click “Log entry”
2. This will drop down to display each type of log entry, along with the number of each completed by your selected trainee(s)
3. Select one or more log entry type from this list – the relevant items will then appear for your selected trainee(s), to the right of the “Filters” bar
4. It is then possible to apply additional filters to narrow-down the log entries that display, e.g. by training grade
5. The relevant log entries will appear to the right of the “Filters” bar in chronological order, most recent first
6. All necessary details for the log entry should be displayed, but it is possible for you to view the full entry by clicking “Read more”

ARCP/External Subspecialty Report form completion

1. On the ePortfolio dashboard, select “My Panels” from the “ARCP and Subspecialty Assessment panels” block
2. Select the relevant panel under “Panel name” – you will then be shown the list of panel members
3. A trainee’s draft ARCP will be accessible to the right of their name, under the “Panel name” column – click on the title highlighted in blue, e.g. “ARCP for Dr X - West Middlesex University Hospital” to access this
4. Click the “Edit” tab – it will then be possible for you to complete the form
5. To navigate through the ARCP/External Subspecialty Assessor Report form, click on the relevant section on the side block
6. To save the form as final, tick the “Completed” box at the bottom of the form then click “Save”

4. Accessing completed ARCP/External Subspecialty Report forms

To access the ARCP Outcome from your dashboard:

1. On the ePortfolio dashboard, select “My Panels” from the “ARCP and Subspecialty Assessment panels” block
2. Select the relevant panel under “Panel name” – you will then be shown the list of panel members
3. Clicking on a trainee’s name will then take the user through to that trainee’s profile page
4. Any ESRs / SST ESRs for the trainee will be visible under the “ARCP” and “External Subspecialty Assessors Report” headings, and accessible through the hyperlinked titles

N.B. New CCT-related information has recently been added underneath the “My ARCP report" section on the profile page, specifically for those trainees who have received Outcome 6. This will appear automatically on a trainee’s profile once the form has been saved with “Outcome 6” selected and the ARCP outcome form has been marked as completed.

The trainee will also receive notifications in their notification centre and an email to prompt them to complete the CCT form. This will contain a link to the CCT page on the college website, and will include the email address for the college’s CCT inbox in case any further application information is required.