

Creating a workplace-based assessment

29 Steps

Created by

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June 8, 2023

Last Updated

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STEP 1

From your dashboard click on Create

You can also click the + button in the top righthand corner of your screen

The screenshot shows the RCR e-portfolio dashboard for Jake Neale (training account only). The dashboard is divided into several sections:

- Header:** RCR logo, 'e-portfolio', 'Dashboard', 'Timeline', 'Documents', 'FAQs', 'Goals', 'Reports', and a user profile icon (JN).
- Profile Section:** 'Jake Neale (training account only)', 'Trainee - Clinical Radiology', and a 'View profile' button.
- Current information:** 'Specialty: Clinical radiology', '6 Jun, 2023 - 12 Jun, 2024 (View)', and 'Educational Supervisor - Clinical Radiology: Amy Marks (training account only), 6 Jun, 2023 - 12 Jun, 2024 (View)'. A 'Collapse' button is visible.
- Inbox:** 'Welcome to the RCR's e-portfolio test site', 'PUBLISHED ON: 6 JUN, 2023', and a 'Go to my inbox' button.
- Create a new event:** A 'Create' button is highlighted in green.
- Learning resources and upcoming courses:** 'Royal Marsden Interesting Cases teaching group: an interactive teaching programme that is open to all and will be of particular interest to trainees preparing for FRCR exams. Contact Emma Mullany or Eleanor Moskovic for more details.'
- Assessment goals:** A table showing progress for various assessments:

Assessment	Progress
FRCR 1 - Anatomy	0%
FRCR 1 - Physics	0%
Mini-IPX	0%
Rad-DOPS	0%
MSF	0%
Teaching Observation	0%
QIPAT	0%
FRCR 2A	0%
Mini-IPX	NOT ACHIEVED

STEP 2

Select the appropriate assessment from the Assessment and evidence section of the create menu

The screenshot shows the 'What would you like to create?' menu. The 'Assessment and evidence' section is highlighted with a red box. The menu is organized into several categories:

- Admin and approvals:** CCT application, Out of programme approval, Update your personal or training details.
- Supervision:** Assign educational supervisor and specialty, Assign training post, OOPA, or period of leave, Clinical supervision report, Educational supervision report, PDP goals, Supported return to training - Clinical radiology, Timetable.
- Assessment and evidence:** Mini Imaging Interpretation Exercise (Mini-IPX), MSF, Multi-disciplinary team meeting assessment (MDTA), Quality Improvement Project/Audit Assessment Tool (QIPAT), Rad-DOPS, Supporting Evidence, Teaching Observation.

STEP 3

Enter the start and end dates for the assessment

RCR | [Learn more](#) | Dashboard | Timeline | Documents | FAQs | Goals | Reports

New Teaching Observation

VERSION 25 | Add tags | Link to goals

Fields marked with * are required. LAST SAVED: UNSAVED

ⓘ This event will be added onto your timeline as a **SHARED** event. Only users with permissions to view this event on your timeline will be able to view this event.

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)

STEP 4

Enter the required details for the assessment

RCR | [Learn more](#) | Dashboard | Timeline | Documents | FAQs | Goals | Reports

New Teaching Observation

VERSION 25 | Add tags | Link to goals

Fields marked with * are required. LAST SAVED: UNSAVED

Training grade *

Setting *

Title *

Learner Group *

Number of learners *

Trainee Comments

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

STEP 5

You can attach files to the assessment form by clicking on **Attach files**

Trainee Comments

You should include any 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 action required *

Attach files

STEP 6

Enter the name of the assessor you would like to complete the form

As you type a list of matching assessors in your training programme will appear and you may select the appropriate assessor from this list.

For some assessments, your assessor does not need to have an e-portfolio account. If your assessor does not appear as you start typing their name, you can enter their email address to invite them to complete the assessment.

Dashboard Timeline Documents FAQs Goals Reports

Trainee Comments

You should include any 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 action required *

Attach files

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

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

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.

Fill in on the same device

No Yes

STEP 7

Click on Submit to send the assessment to your assessor

Once their section is completed, the assessment will be published to your timeline

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

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

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.

Fill in on the same device

No Yes

Submit Save as draft

STEP 8

If you are with your assessor when you create the assessment, they can fill in their section before you submit the form.

STEP 9

Check Fill in on the same device and the assessor's section will appear

Attach files

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

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

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.

Fill in on the same device

No Yes

Assessor's Name ★

Assessor's role ★

STEP 10

Click on Submit

If the assessor completes their section on the same device, they will receive an email when you submit the form asking them to confirm that they are happy with the information in the form before the assessment is completed.

Assessor's declaration

By submitting this form you are agreeing that you have personally observed this teaching event and this assessment accurately reflects the level of performance and understanding demonstrated.

[Attach files](#)

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

Viewing the progress of a workplace-based as... 12 Steps

STEP 11

Find the assessment in your timeline

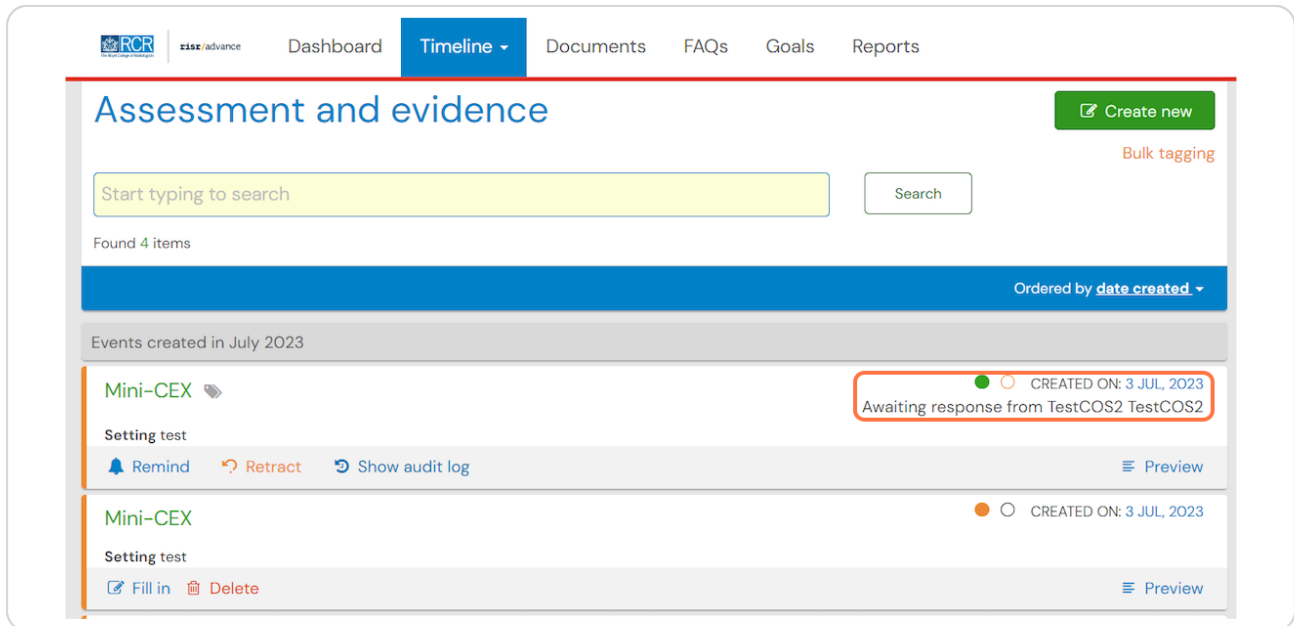
You can use the search box or Advanced search to help you find the required assessment

The screenshot shows the 'Assessment and evidence' section of the RCR system. The navigation bar includes 'Dashboard', 'Timeline' (selected), 'Documents', 'FAQs', 'Goals', and 'Reports'. A search box is highlighted with a red rectangle, containing the text 'Start typing to search'. Below the search box, it says 'Found 4 items'. The main content area displays a list of assessments created in July 2023, ordered by 'date created'. The first item is 'Mini-CEX' with a status of 'Awaiting response from TestCOS2 TestCOS2'. The second item is another 'Mini-CEX' with a status of 'Minimum 4 responses needed'. The third item is 'Multiple consultant report (MCR)'. On the right side, there is a sidebar with 'Bookmarked searches' and 'Advanced search' sections. The 'Advanced search' section is highlighted with a red rectangle and contains fields for 'Event type', 'State', 'Date after', and 'Date before', along with an 'Apply' button.

STEP 12

You can view a summary of the progress of your assessment on the right

Green dots represent completed sections and orange dots represent incomplete sections. The person who needs to respond to the next section is shown below the progress dots

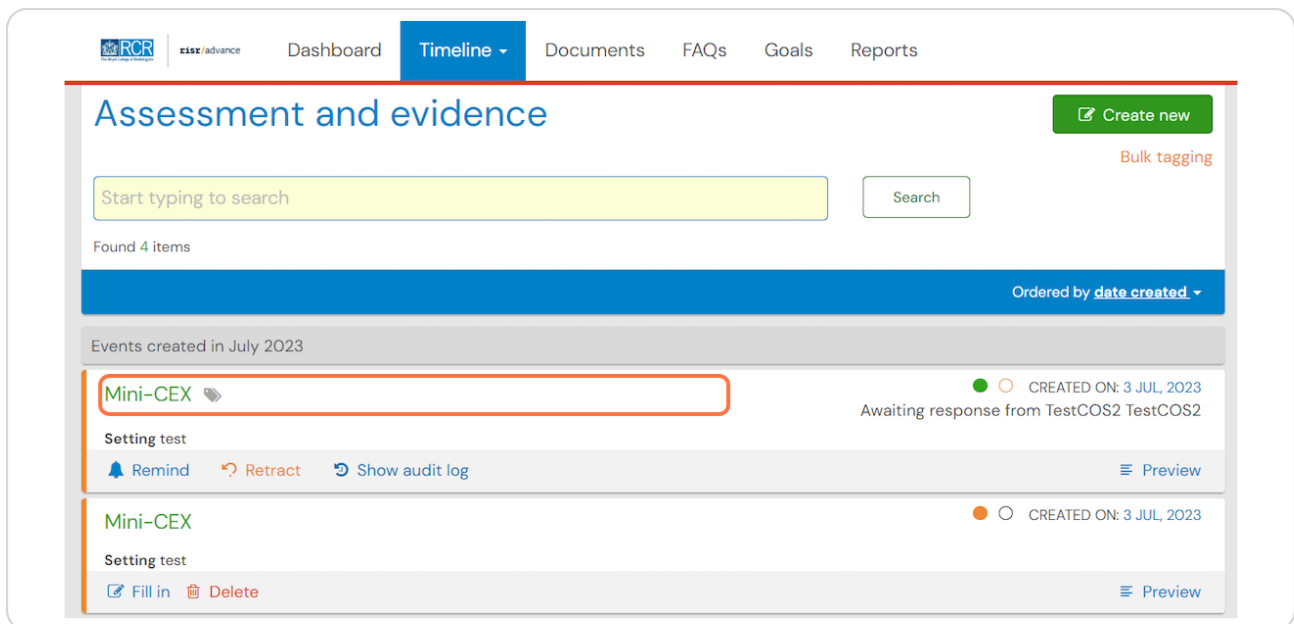


The screenshot shows the 'Assessment and evidence' page with a navigation bar at the top containing 'RCR', 'x15x/advance', 'Dashboard', 'Timeline', 'Documents', 'FAQs', 'Goals', and 'Reports'. The page title is 'Assessment and evidence' with a 'Create new' button and 'Bulk tagging' link. A search bar contains 'Start typing to search' and a 'Search' button. Below the search bar, it says 'Found 4 items' and 'Ordered by date created'. A section titled 'Events created in July 2023' contains two items:

- Mini-CEX** (green dot) - Setting test - Awaiting response from TestCOS2 TestCOS2 (CREATED ON: 3 JUL, 2023). Actions: Remind, Retract, Show audit log, Preview.
- Mini-CEX** (orange dot) - Setting test - (CREATED ON: 3 JUL, 2023). Actions: Fill in, Delete, Preview.

STEP 13

Click on the assessment to see a detailed view of its progress



This screenshot is identical to the one in Step 12, but the first 'Mini-CEX' item is highlighted with a red rectangular box, indicating it has been selected for a detailed view.

STEP 14

You can view the progress of the assessment and any information entered into completed sections

The screenshot shows the 'Mini-CEX' assessment page. At the top, there is a navigation bar with the RCR logo, 'risc/advance', and links for 'Dashboard', 'Timeline', 'Documents', 'FAQs', 'Goals', and 'Reports'. The main heading is 'Mini-CEX'. On the right, there is a user profile icon 'D' and a 'Remind' button. Below this, a status bar shows a green circle, a red circle, and the text 'SUBMITTED AWAITING RESPONSE FROM TESTCOS2 TESTCOS2'. To the right of this bar is 'VERSION 16' and a refresh icon. Below the status bar, it says 'Event occurred on: 3 Jul, 2023' and 'Created on: 3 Jul, 2023'. There is a 'Tags' section with a 'Show 1 tags' button. At the bottom, a section is marked 'TT' and 'Section filled in by TestCO2 TestCO2' with the status 'FILLED'.

STEP 15

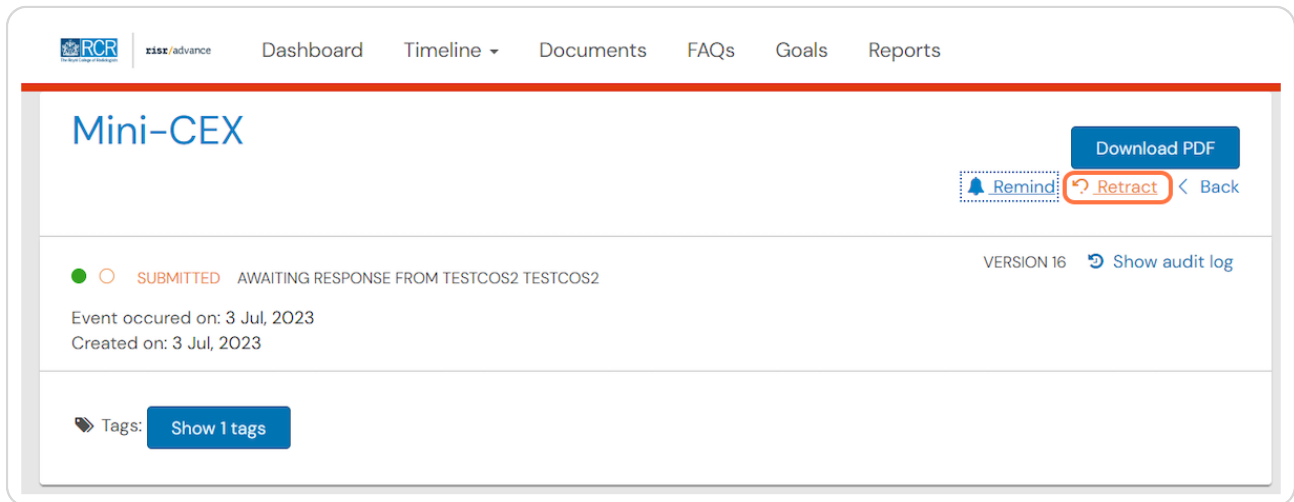
You can send a reminder to your assessor by clicking on Remind

This screenshot is similar to the previous one but highlights the 'Remind' button in the top right corner. The navigation bar and main heading are the same. The status bar now shows 'SUBMITTED AWAITING RESPONSE FROM TESTCOS2 TESTCOS2' with 'VERSION 16' and a 'Show audit log' link. The 'Event occurred on' and 'Created on' dates are also present. The 'Tags' section with 'Show 1 tags' is visible. The 'Remind' button is circled in red, indicating it is the focus of the step.

STEP 16

You can also retract an assessment by clicking on Retract

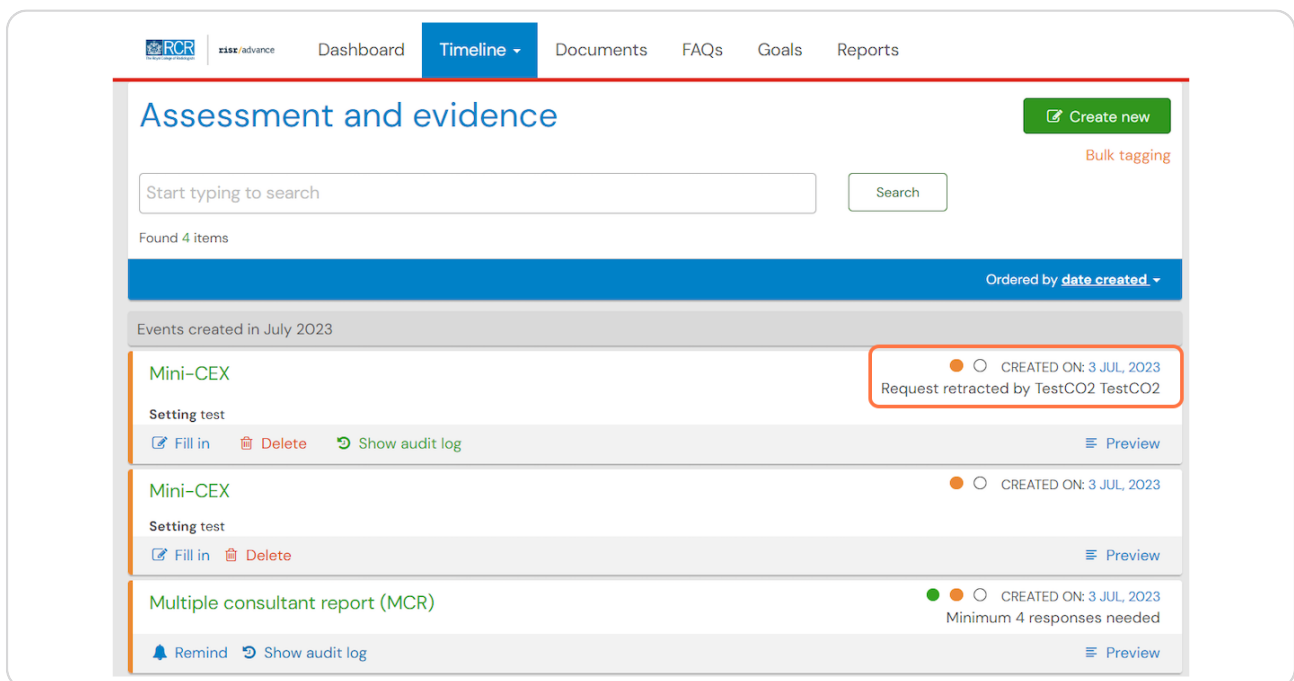
Your supervisor will no longer have access to this assessment, but the assessment will not be deleted and will still appear in your timeline



The screenshot shows the 'Mini-CEX' assessment page. At the top, there is a navigation bar with 'RCR', 'easr/advance', and menu items: 'Dashboard', 'Timeline', 'Documents', 'FAQs', 'Goals', and 'Reports'. The main header area contains the title 'Mini-CEX', a 'Download PDF' button, and a 'Remind' button. A 'Retract' button is highlighted with a red box, and a 'Back' link is also visible. Below the header, the status is 'SUBMITTED' with a green dot and an orange dot, and the text 'AWAITING RESPONSE FROM TESTCOS2 TESTCOS2'. It also shows 'VERSION 16' and a 'Show audit log' link. The event details are 'Event occurred on: 3 Jul, 2023' and 'Created on: 3 Jul, 2023'. At the bottom, there is a 'Tags' section with a 'Show 1 tags' button.

STEP 17

Retracted assessments will show in your timeline with the first progress dot in orange



The screenshot shows the 'Assessment and evidence' timeline page. The navigation bar includes 'RCR', 'easr/advance', 'Dashboard', 'Timeline', 'Documents', 'FAQs', 'Goals', and 'Reports'. The main header has the title 'Assessment and evidence', a 'Create new' button, and a 'Bulk tagging' link. A search bar with the placeholder 'Start typing to search' and a 'Search' button is present. Below the search bar, it says 'Found 4 items'. A blue bar indicates the items are 'Ordered by date created'. The main content area shows a list of events created in July 2023. The first event is 'Mini-CEX' with the status 'Setting test'. It has a first progress dot in orange and a second in white. The text 'Request retracted by TestCO2 TestCO2' is highlighted with a red box. Below this event are two more 'Mini-CEX' entries and one 'Multiple consultant report (MCR)' entry. Each entry includes action buttons like 'Fill in', 'Delete', 'Show audit log', and 'Preview'.

STEP 18

You can edit the assessment by clicking on **Fill in** under the assessment name, or you can click the name of the assessment to open up a more detailed view

The screenshot shows the 'Assessment and evidence' page. At the top, there is a navigation bar with 'RCR', 'r18e/advance', 'Dashboard', 'Timeline', 'Documents', 'FAQs', 'Goals', and 'Reports'. Below the navigation bar, the page title is 'Assessment and evidence'. There is a 'Create new' button and a 'Bulk tagging' link. A search bar is present with the text 'Start typing to search' and a 'Search' button. Below the search bar, it says 'Found 4 items'. There is a blue bar with 'Ordered by date created'. Below that, it says 'Events created in July 2023'. There are two assessment entries. The first entry is 'Mini-CEX' with the status 'Setting test'. It has a 'Fill in' button (highlighted with a red box), a 'Delete' button, and a 'Show audit log' button. The second entry is also 'Mini-CEX' with the status 'Setting test' and 'Fill in' and 'Delete' buttons. The page also shows 'CREATED ON: 3 JUL, 2023' and 'Request retracted by TestCO2 TestCO2'.

STEP 19

From the detailed view you can click on **Fill in** to edit the assessment

The screenshot shows the detailed view of a 'Mini-CEX' assessment. At the top, there is a navigation bar with 'RCR', 'r18e/advance', 'Dashboard', 'Timeline', 'Documents', 'FAQs', 'Goals', and 'Reports'. Below the navigation bar, the page title is 'Mini-CEX'. There is a 'Fill in' button (highlighted with a red box), a 'Delete' button, and a 'Back' button. Below the title, there is a status bar with 'DRAFT PRIVATE' and 'REQUEST RETRACTED BY TESTCO2 TESTCO2'. There is also a 'VERSION 16' and 'Show audit log' link. Below the status bar, there is a section for 'Date occurred on 3 Jul, 2023' and 'End date 3 Jul, 2023'. The main content area contains 'Training grade ST3', 'What type of consultation was this? Good news', 'Case description test', 'Setting test', and 'Trainee comments'. There is also a section for 'Invited TestCOS2@rcr.ac.uk'.

STEP 20

You will be able to edit any of the information you entered in the first section of the assessment

The screenshot shows a web interface for an assessment form. At the top, there is a navigation bar with the RCR logo, the text 'x152/advance', and menu items: 'Dashboard', 'Timeline', 'Documents', 'FAQs', 'Goals', and 'Reports'. The main form area contains several sections:

- Training grade ***: A dropdown menu with 'ST3' selected.
- What type of consultation was this? ***: A dropdown menu with 'Good news' selected.
- Case description ***: A text input field containing 'test'.
- Setting ***: A text input field containing 'test'.
- Trainee comments**: A section with a blue heading. It contains two paragraphs of instructional text: 'You should include any comments on the assessment you have carried out and your own performance before you submit your request to your chosen assessor.' and 'Once you assessor has completed and submitted the assessment it will be closed and placed in your timeline as complete.'
- Trainee's comments – comment on your performance and any action required ***: A text input field containing 'test'.
- Attach files**: A button with a file upload icon and the text 'Attach files'.

STEP 21

You will also be able to send the assessment to your supervisor

This can be the same supervisor as sent to previously or a different supervisor. The name of the original supervisor will appear by default, however you can delete this and add a different supervisor

Trainee comments

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

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

Trainee's comments – comment on your performance and any action required ★

test

Attach files

The next section of this form can be filled in by users with these roles: Invited Assessor, Clinical Supervisor, Assessor, Educational Supervisor – Clinical Oncology, Head of School – Clinical Oncology

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

TestCOS2 TestCOS2 <TestCOS2@rcr.ac.uk>

You can invite users with or without 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

By continuing, you will invite the following users to fill in the next section: TestCOS2@rcr.ac.uk

Submit Save as draft

STEP 22

Click on Submit to send the assessment to your chosen supervisor

The next section of this form can be filled in by users with these roles: Invited Assessor, Clinical Supervisor, Assessor, Educational Supervisor – Clinical Oncology, Head of School – Clinical Oncology

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

TestCOS2 TestCOS2 <TestCOS2@rcr.ac.uk>

You can invite users with or without 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

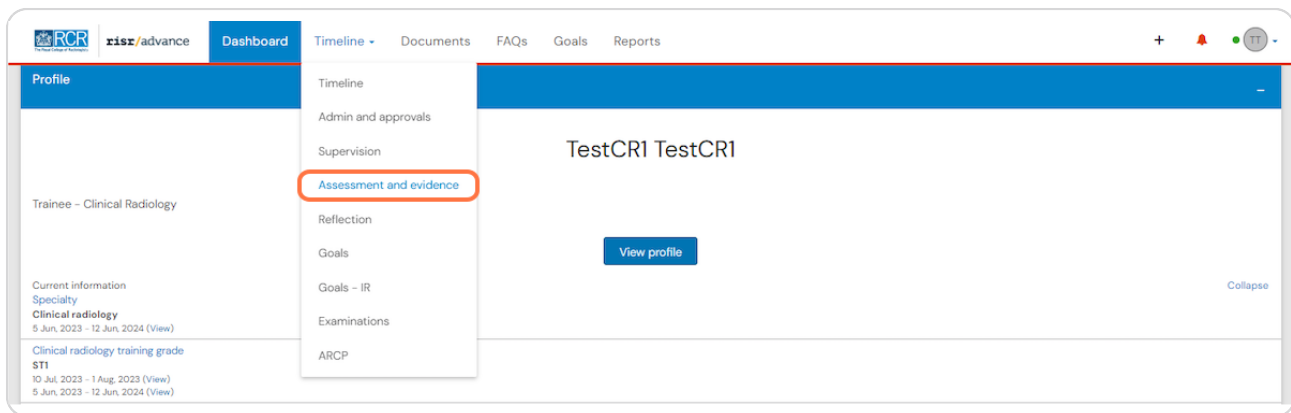
No Yes

By continuing, you will invite the following users to fill in the next section: TestCOS2@rcr.ac.uk

Submit Save as draft

STEP 23

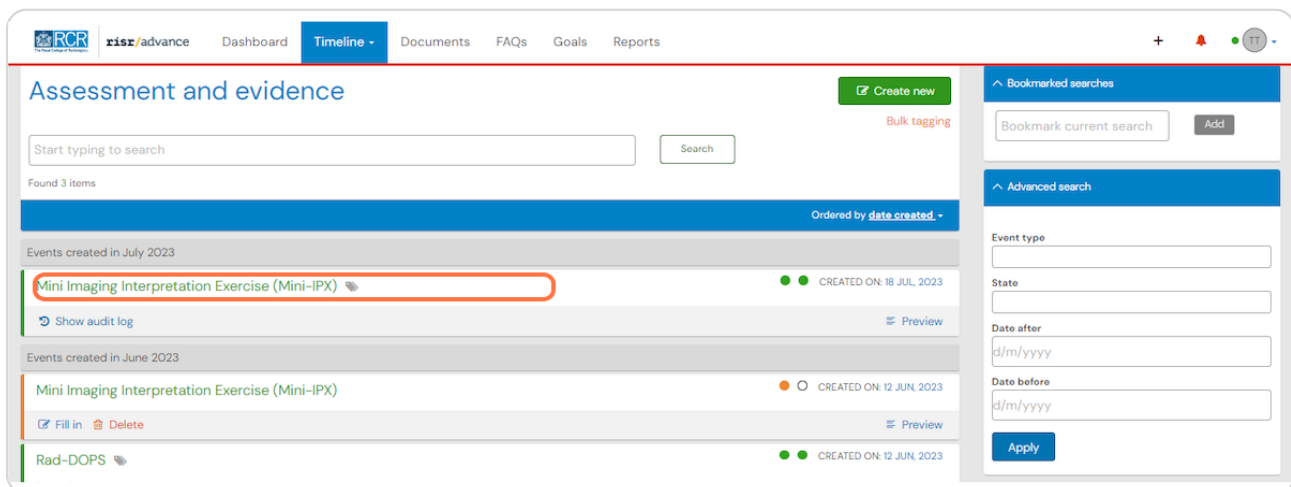
Click on Timeline and select Assessment and evidence



STEP 24

Select the required assessment from your 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 assessment



STEP 25

Scroll to bottom of the assessment and click on Show more

Entrustment Level

Level 2 – Entrusted to act with direct supervision

Further descriptors for entrustment levels:

- Level 1 – Entrusted to observe only – no provision of clinical care – Understands the concept of the imaging modality but does not yet have the experience to provide a radiology report and management plan
- Level 2 – Entrusted to act with direct supervision – Demonstrates some knowledge and experience resulting in a limited report and management plan
- Level 3 – Entrusted to act with indirect supervision – Demonstrates satisfactory knowledge and a logical evaluation of the clinical cases resulting in an acceptable report and management plan
- Level 4 – Entrusted to act unsupervised – Demonstrates detailed knowledge and good evaluation of clinical cases resulting in a succinct report and clear management plan

Assessor's declaration

By submitting this form you are agreeing that you observed the case(s) described.

Once you have completed and submitted this assessment, it will be closed and placed into the trainee's timeline as complete.

Show less ^

0 TAGS 0 DOCUMENTS 0 COMMENTS

Show more v

STEP 26

Add your comment

0 TAGS 0 DOCUMENTS 0 COMMENTS

Add new comment, tag or document Save

Comment

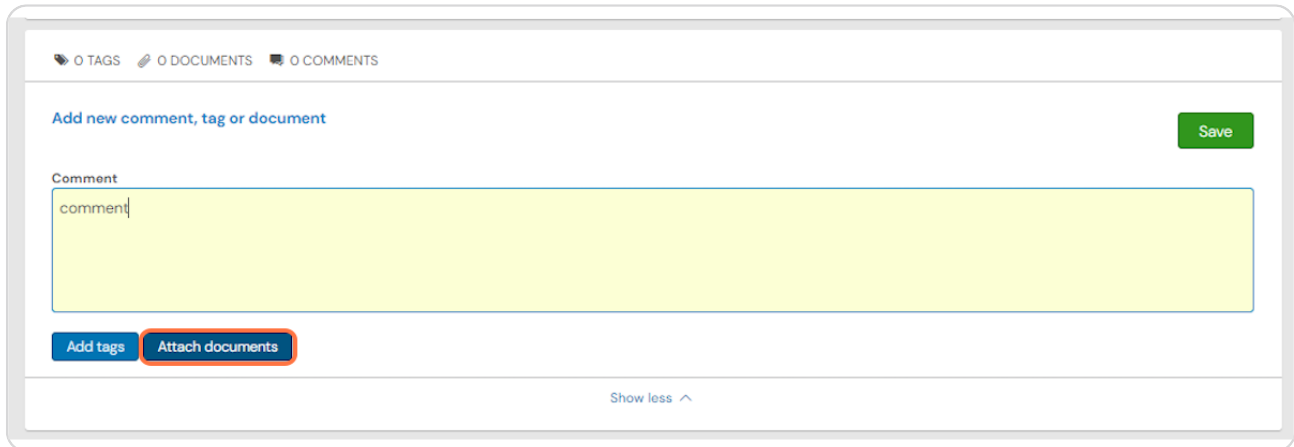
comment

Add tags Attach documents

Show less ^

STEP 27

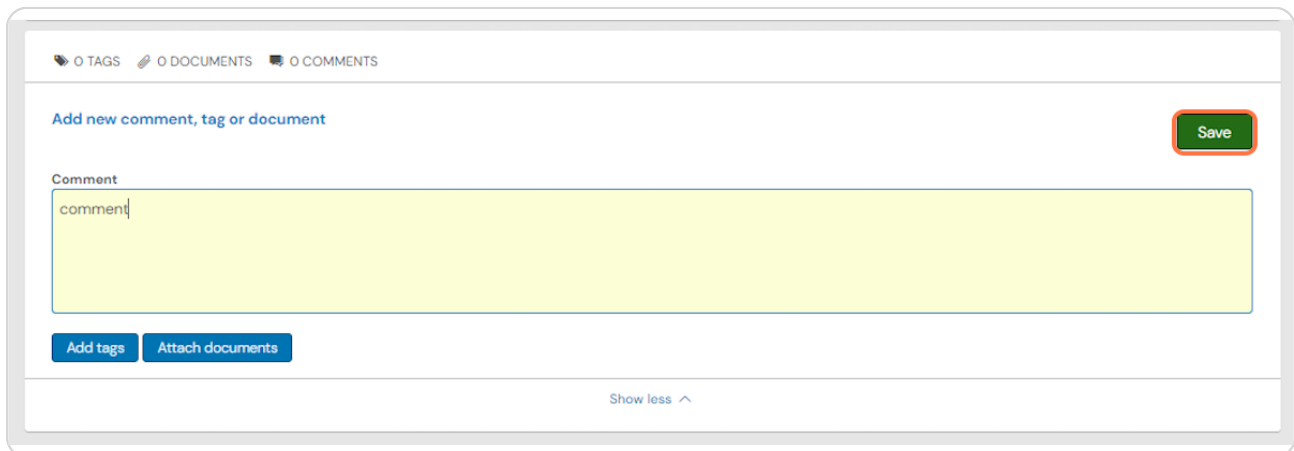
You can attach documents to your comment if required by clicking on **Attach documents**



A screenshot of a web interface for adding a comment. At the top, there are three icons with zero counts: TAGS, DOCUMENTS, and COMMENTS. Below this is a header "Add new comment, tag or document" and a green "Save" button. A large yellow text area contains the word "comment". Below the text area are two buttons: "Add tags" and "Attach documents", with the latter highlighted by a red border. At the bottom, there is a "Show less" link with an upward arrow.

STEP 28

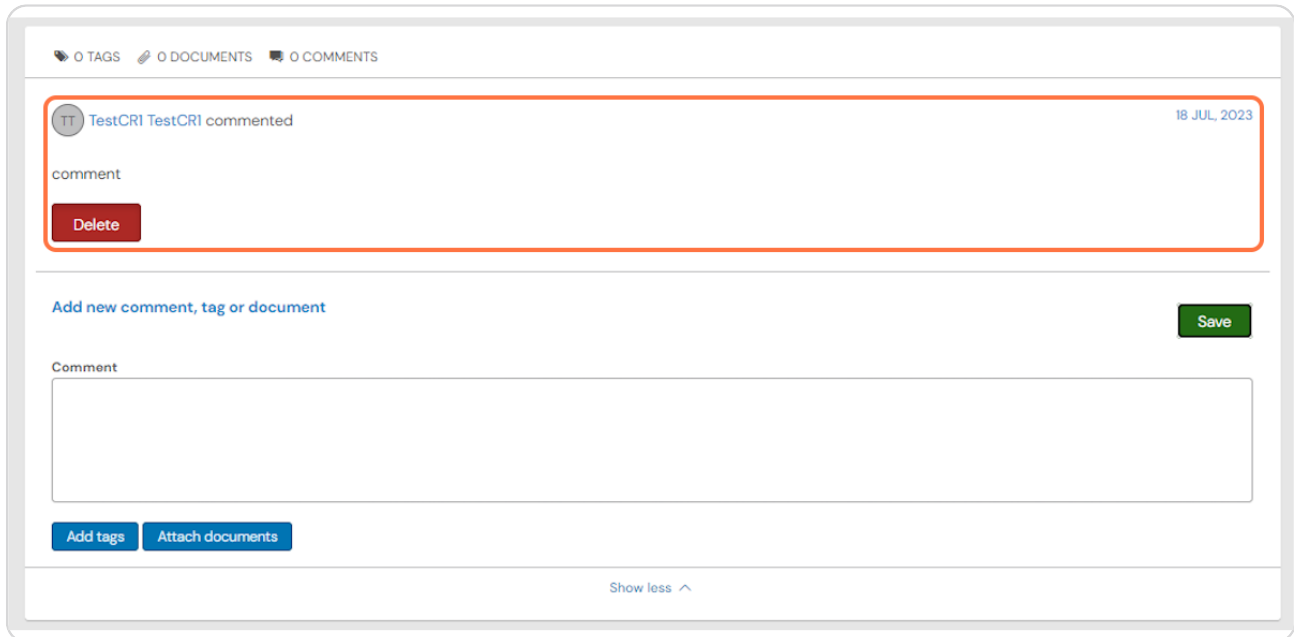
Click on **Save** to publish the comments



A screenshot of the same web interface as in Step 27. The "Save" button is now highlighted with a red border, indicating it is the next step in the process. All other elements, including the text area and the "Attach documents" button, remain the same.

STEP 29

You can view all comments added to your assessment and delete any of your own comments by clicking on Delete



The screenshot displays a user interface for managing comments. At the top, there are three tabs: 'TAGS', 'DOCUMENTS', and 'COMMENTS', each with a zero count. Below the tabs, a comment is shown with a red border. The comment is from 'TestCRI TestCRI' and is dated '18 JUL, 2023'. The text of the comment is 'comment'. A red 'Delete' button is located below the comment text. Below the comment, there is a section for adding new comments, tags, or documents. This section includes a 'Save' button, a text input field labeled 'Comment', and two buttons: 'Add tags' and 'Attach documents'. At the bottom of the interface, there is a 'Show less' link with an upward-pointing arrow.

