

# Approving an out of programme activity request

A guide for training programme directors

10 Steps

---

Created by

WDAT

Creation Date

June 14, 2023

Last Updated

July 17, 2023

## STEP 1

### Select the out of programme approval request from your to do list

The screenshot shows a user interface with a navigation bar at the top containing 'Dashboard', 'Timeline', 'Documents', 'Content', 'Reports', and 'User management'. Below the navigation bar, there are two main sections: 'To Do' and 'Saved drafts'. The 'To Do' section lists four items, each with a progress indicator (a row of circles) and a 'CREATED ON' date. The first two items are 'Clinical supervision report for TestCR4' (created on 14 JUN, 2023). The third item is 'Out of programme approval for TestCR5' (created on 12 JUN, 2023). The fourth item, 'Out of programme approval for Jake Neale' (created on 12 JUN, 2023), is highlighted with a red rectangular box. The 'Saved drafts' section is currently empty, displaying the message 'There are no items available'.

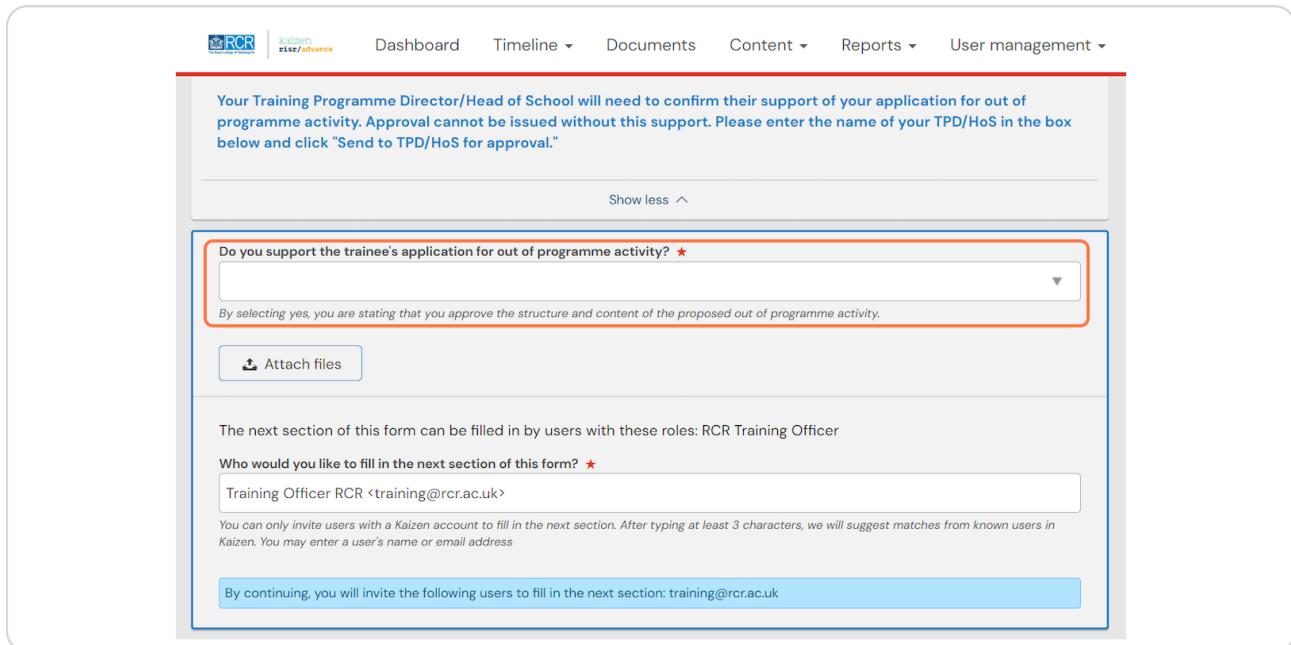
## STEP 2

### Click on Fill in to complete the out of programme approval

The screenshot displays the 'Out of programme approval for Jake Neale' form. At the top, there is a navigation bar with 'Dashboard', 'Timeline', 'Documents', 'Content', 'Reports', and 'User management'. The main content area shows the form title 'Out of programme approval for Jake Neale' and a 'Fill in' button highlighted with a red box. Below the title, there are status indicators: 'DRAFT PRIVATE' and 'AWAITING YOUR ACTION', along with 'VERSION 7' and a 'Show audit log' link. The form description reads 'I would like to request OOP'. At the bottom, there are fields for 'Date occurred on 12 Jun, 2023', 'End date 12 Jun, 2023', and 'Description (optional) I would like to request OOP'. On the right side, there is an 'Information' panel with the text: 'You are viewing all of the details on the current event. The status, description and tags are shown at the top followed by the completed section(s) beneath. You can add a comment, document or tag at the bottom of this form.'

### STEP 3

## Review the information supplied by the trainee and indicate your approval



RCR Kaizen **risk/advance** Dashboard Timeline Documents Content Reports User management

Your Training Programme Director/Head of School will need to confirm their support of your application for out of programme activity. Approval cannot be issued without this support. Please enter the name of your TPD/HoS in the box below and click "Send to TPD/HoS for approval."

Show less ^

Do you support the trainee's application for out of programme activity? \*

By selecting yes, you are stating that you approve the structure and content of the proposed out of programme activity.

Attach files

The next section of this form can be filled in by users with these roles: RCR Training Officer

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

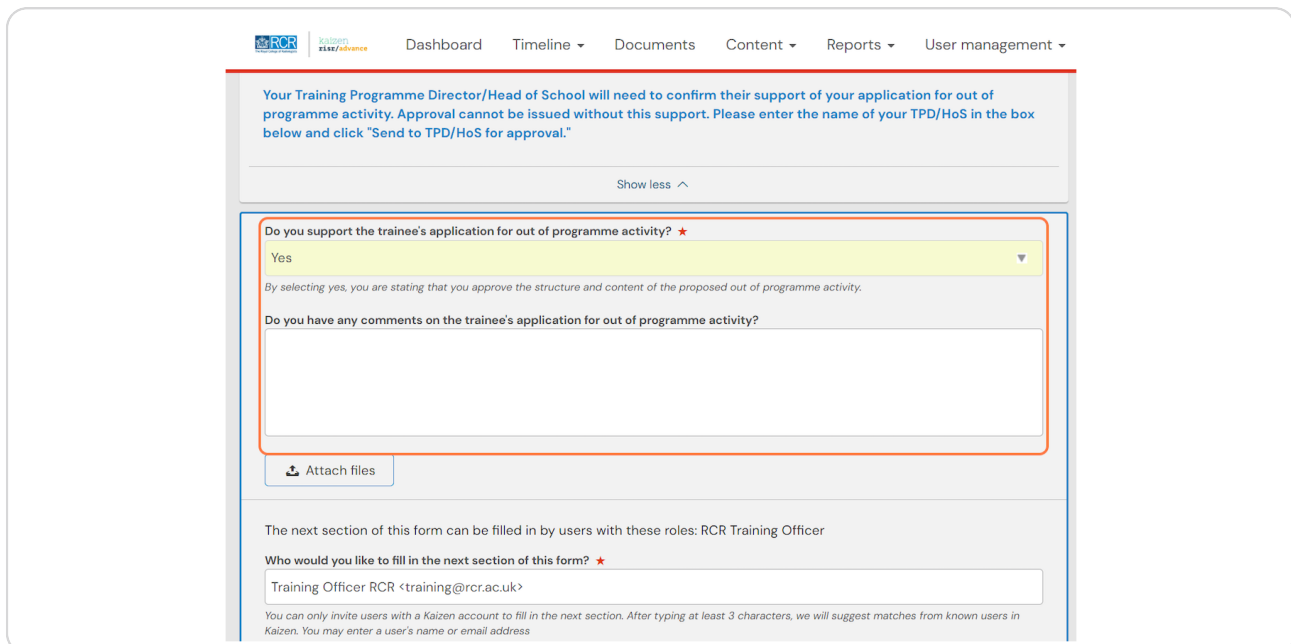
Training Officer RCR <training@rcr.ac.uk>

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

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

### STEP 4

## Selecting Yes gives you the opportunity to add your comments on the out of programme approval



RCR Kaizen **risk/advance** Dashboard Timeline Documents Content Reports User management

Your Training Programme Director/Head of School will need to confirm their support of your application for out of programme activity. Approval cannot be issued without this support. Please enter the name of your TPD/HoS in the box below and click "Send to TPD/HoS for approval."

Show less ^

Do you support the trainee's application for out of programme activity? \*

Yes

By selecting yes, you are stating that you approve the structure and content of the proposed out of programme activity.

Do you have any comments on the trainee's application for out of programme activity?

Attach files

The next section of this form can be filled in by users with these roles: RCR Training Officer

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

Training Officer RCR <training@rcr.ac.uk>

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

## STEP 5

### Click on Send to RCR Training Officer for approval

Do you support the trainee's application for out of programme activity? ★

Yes

*By selecting yes, you are stating that you approve the structure and content of the proposed out of programme activity.*

Do you have any comments on the trainee's application for out of programme activity?

Attach files

The next section of this form can be filled in by users with these roles: RCR Training Officer

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

Training Officer RCR <training@rcr.ac.uk>

*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*

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

Send to RCR Training Officer for approval Save as draft

## STEP 6

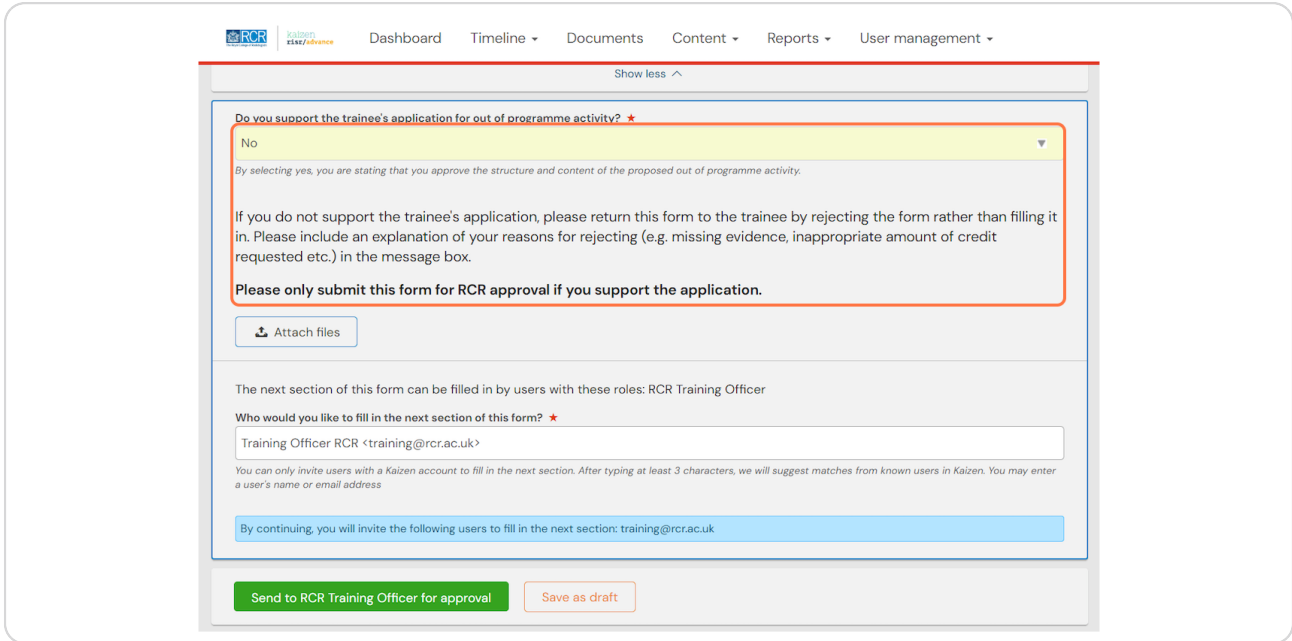
### The RCR training officer will complete the approval process and the completed form will be published to the trainee's timeline

If the trainee needs to provide their deanery/local office with evidence of the approval, they can download the completed form as a PDF

## STEP 7

If you do not approve the out of programme request, we recommend that you return the form to the trainee rather than filling it in and sending it to the RCR training officer.

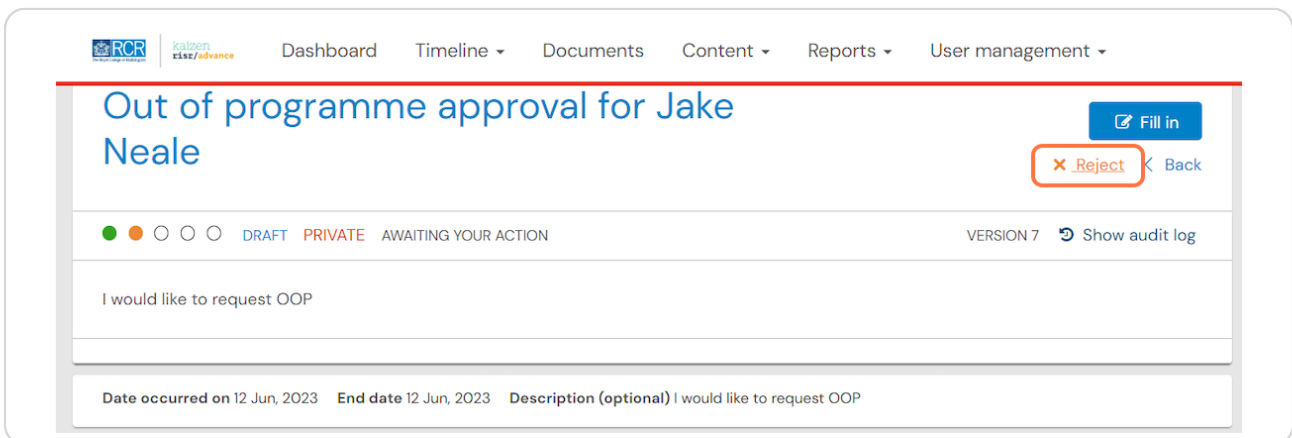
If the form is returned to the trainee in this way then they are able to modify the form based on your comments and re-submit it if appropriate. If the form is sent to the RCR training officer this will not be possible.



The screenshot shows a web interface for RCR training officer approval. At the top, there is a navigation bar with 'Dashboard', 'Timeline', 'Documents', 'Content', 'Reports', and 'User management'. Below this is a 'Show less' button. The main content area is titled 'Do you support the trainee's application for out of programme activity?'. A dropdown menu is open, showing 'No' selected. Below the dropdown, there is a note: 'By selecting yes, you are stating that you approve the structure and content of the proposed out of programme activity.' A larger text box contains instructions: 'If you do not support the trainee's application, please return this form to the trainee by rejecting the form rather than filling it in. Please include an explanation of your reasons for rejecting (e.g. missing evidence, inappropriate amount of credit requested etc.) in the message box.' Below this is a button 'Attach files'. A section titled 'The next section of this form can be filled in by users with these roles: RCR Training Officer' contains a field 'Who would you like to fill in the next section of this form?' with the value 'Training Officer RCR <training@rcr.ac.uk>'. A note below states: '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'. A blue box below this says: 'By continuing, you will invite the following users to fill in the next section: training@rcr.ac.uk'. At the bottom, there are two buttons: 'Send to RCR Training Officer for approval' (green) and 'Save as draft' (orange).

## STEP 8

To reject the approval request, click back on your browser to return to the original form, then click on **Reject**

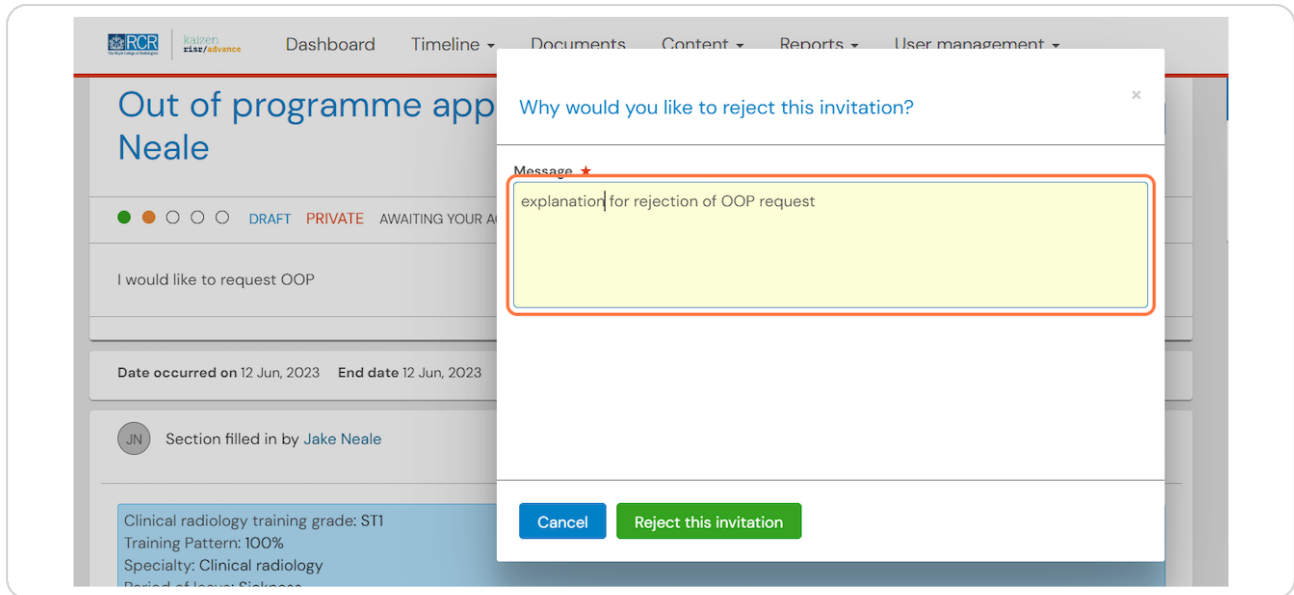


The screenshot shows the RCR training officer approval form interface. At the top, there is a navigation bar with 'Dashboard', 'Timeline', 'Documents', 'Content', 'Reports', and 'User management'. Below this is a 'Show less' button. The main content area is titled 'Out of programme approval for Jake Neale'. There are two buttons: 'Fill in' (blue) and 'Reject' (orange, highlighted with a red box). A 'Back' button is also visible. Below the buttons, there is a progress indicator with five circles, the first two of which are filled. The status is 'DRAFT PRIVATE AWAITING YOUR ACTION'. To the right, it says 'VERSION 7' and 'Show audit log'. Below this, there is a text box containing 'I would like to request OOP'. At the bottom, there is a table with columns: 'Date occurred on 12 Jun, 2023', 'End date 12 Jun, 2023', and 'Description (optional) I would like to request OOP'.

## STEP 9

### Please provide the trainee with an explanation for your rejection of their OOP request

We recommend that you also discuss this directly with the trainee



## STEP 10

### Click on Reject this invitation to return the approval request to the trainee

The trainee will now be able to modify the form and re-submit it if appropriate

