



Consultant Assessment of Trainee
Forms
User Manual

Supervisor Guide

Table of Contents

- 1 Overview 3
- 2 Access 3
 - 2.1 How do I access the system? 3
- 3 Browser Compatibility 3
- 4 Consultant Assessment Process 4
 - 4.1 Introduction 4
 - 4.2 Workflow and Access Control 4
- 5 Supervisor’s Interaction with the System 6
 - 5.1 Create a List of Contacts for your Consultants 6
 - 5.2 Create a Survey record 8
 - 5.3 Get System to Issue out the Consultant Assessment forms 10
 - 5.4 Check if a Consultant has responded 12
 - 5.5 View Consultant Feedback 12
 - 5.6 Complete the Summary of Consultant Assessment of Trainee Forms 14

1 Overview

The Online Consultant Assessment functionality allows Supervisors to issue Consultant Assessment of Trainee forms to Consultants from within the system. The system enables Supervisors to maintain their own list of consultants and then select all or a subset of the group of consultants and trigger an automated email to consultants from the system. The system is responsible for issuing the emails with a link to the relevant Consultant Assessment of Trainee form. Once feedback is received, the system displays the feedback results, which Supervisors can select to generate the Summary of Consultant Assessment of Trainee Forms. The collation and adding up of the results for the Summary is done automatically by the system. Once the Summary has been completed, it is submitted and this triggers the Summary to be displayed in the Six-monthly Summative Assessments that are awaiting supervisor submission.. The online system provides a seamless integration of Consultant Assessments and Summative Assessments.

2 Access

2.1 How do I access the system?

The Consultant Assessment functionality is available via the same link that you use to access the online Formative Appraisal and Summative Assessment functionality: <https://logbook.my.ranzcog.edu.au>

You can also navigate to the online Consultant Assessment functionality by visiting the RANZCOG website, scrolling down to the Training section, clicking on Specialist Training and then clicking on 'Online Portfolio & Assessments'. Then click on the green Login button.

3 Browser Compatibility

The Consultant Assessment functionality is available in the latest versions of:

- ✓ Internet Explorer;
- ✓ Firefox;
- ✓ Chrome;
- ✓ Opera; and
- ✓ Safari.

Note: The online functionality is not built for versions of Internet Explorer preceding IE10. It is recommended that you update Internet Explorer on your Windows computer or device if you are using an earlier version.

4 Consultant Assessment Process

4.1 Introduction

The Consultant Assessment and Summative Assessment functionalities are separate, however, the system aims to integrate the two. For Consultant Assessments, Supervisors are required to create a ‘Survey’ record for each trainee they are completing a Six-monthly Summative Assessment. The Survey record can be allows the Supervisor to issue separate emails to Consultants (for the same trainee) and the Survey also provides access to all the Consultant Feedback received by the system from the Consultants.

Supervisors can select the Consultants who have provided feedback and the system will automatically collate ratings in the Summary of Consultant Assessment of Trainee Forms section.

If a Supervisor is supervising a trainee for both Core and Advanced training, then two separate Summative Assessments are required and therefore two separate Survey records are also needed, one for Core and one for Advanced.

The Consultant Assessment Survey can be created any time, which means that the Consultant Assessment Process can be completed in preparation for the Six-monthly Summative Assessment. The feedback is only displayed to the Supervisor who created the Survey and issued the Consultant Assessments of Trainee Forms. Trainees will only see the Summary within their Six-monthly Summative Assessment and all the Survey related information will be de-identified.

The Survey record has a lifecycle, which is explained below.

4.2 Workflow and Access Control

The system controls a user’s access to the Survey record by identifying the status of the Survey.

The table below explains the process associated with creating and completing a Survey.

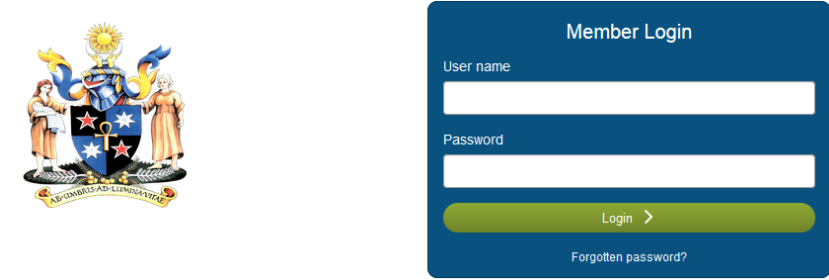
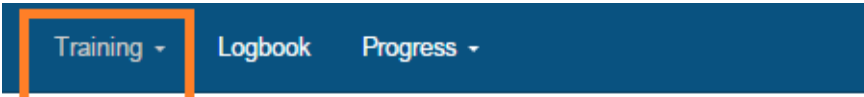
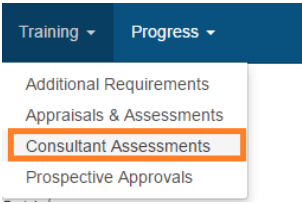
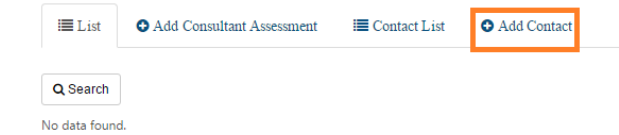
<u>Consultant Assessment Process</u>	<u>Status of Survey</u>	<u>Who can update the Survey</u>
1. Supervisor creates their list of contacts who are Consultants and Advanced Trainees from whom they will be requesting feedback. (This is a pre-requisite to issuing out requests for Consultant Assessments of Trainee forms.)	N/A	N/A
2. Supervisor creates a Survey by first selecting a trainee. 3. The system creates the Survey. Status is “New Entry”.	New Entry	Supervisor
4. Supervisor opens the Survey and selects contacts to whom they want to issue the Consultant Assessment of Trainee forms to. 5. Supervisor selects a date by which Consultants should respond.	New Entry	Supervisor
6. Supervisor clicks Send for the system to email the Consultants a link to the Consultant Assessment of Trainee form.	In Progress	Supervisor
7. Feedback is received by the System. 8. Supervisor selects the feedback records to view the Feedback.	In Progress	Supervisor

9. System automatically generates the Summary section.		
10. If 2 or more feedback records are selected, Supervisor can submit the Survey. 11. Supervisor Submits the Survey. Status changes to "Pending 6-Monthly Submission"	Pending 6-Monthly Submission	Supervisor
12. If a trainee has submitted their Six-monthly Summative Assessment, the Supervisor can open the Assessment and include the submitted Survey that has Status of "Pending 6-Monthly Submission".	Pending 6-Monthly Submission	Supervisor
13. Once the Supervisor submits the Six-monthly Summative Assessment, the Status of the included Survey will change to "Completed" and the Survey will no longer be updatable.	Completed	No one

5 Supervisor’s Interaction with the System

This section explains the steps that Supervisors need to follow to issue Consultant Assessment of Trainee forms and generate a Summary of Consultant Assessment of Trainee Forms.

5.1 Create a List of Contacts for your Consultants

Action	
<p>Sign in to the Online Portfolio</p>	<p>Login</p> <p>Members Portal /</p> 
<p>Click on the Training menu</p>	
<p>Click on the Consultant Assessments menu</p>	
<p>Click on the Add Contact tab to details of your Consultants</p>	<p>Consultant Assessments</p> <p>Members Portal / Training / Consultant Assessments</p> 
<p>Enter the Consultant details and click on Save</p>	<p>You will only need to create a contact once. Keep using the same contacts (if relevant) and update details if necessary.</p>

Action

Contact Detail

Members Portal / Training

[List](#)
[Add Consultant Assessment](#)
[Contact List](#)
[Add Contact](#)

Add Contact

Title: *

First Name: *

Last Name: *

Role: *

Email: *

Click on the Contact List tab to see a list of all the Consultants that you have added

Contact List

Members Portal / Training

[List](#)
[Add Consultant Assessment](#)
[Contact List](#)
[Add Contact](#)

Q Search

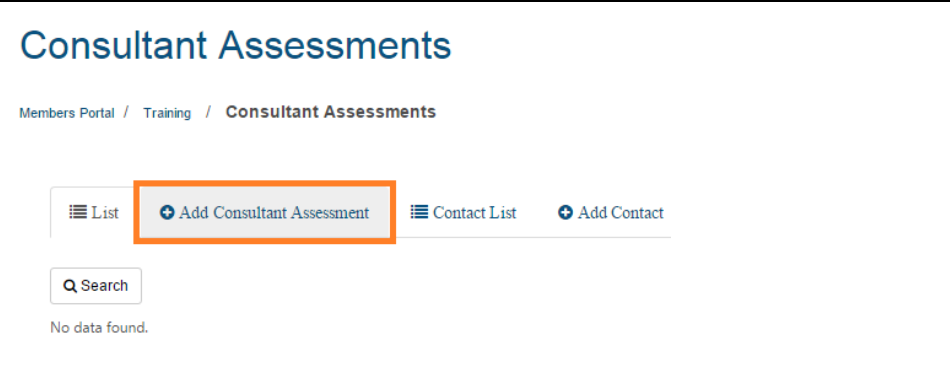
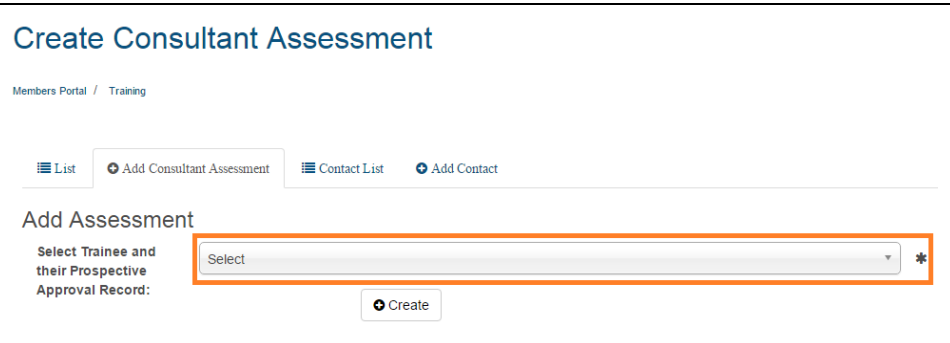
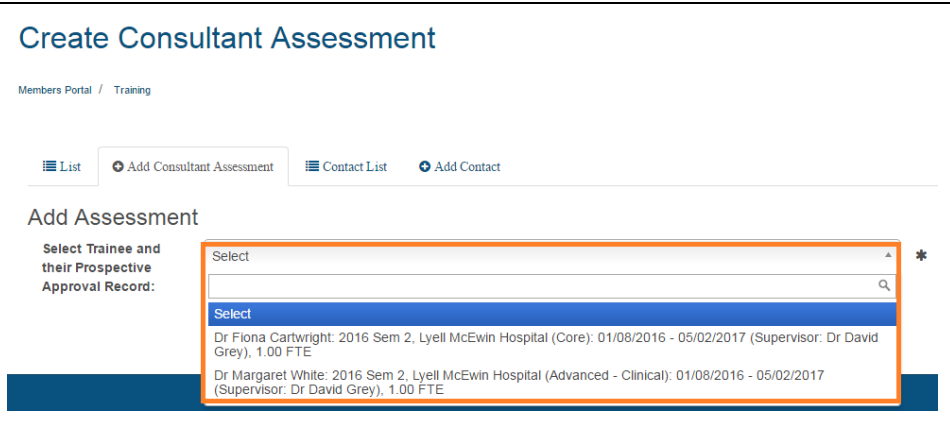
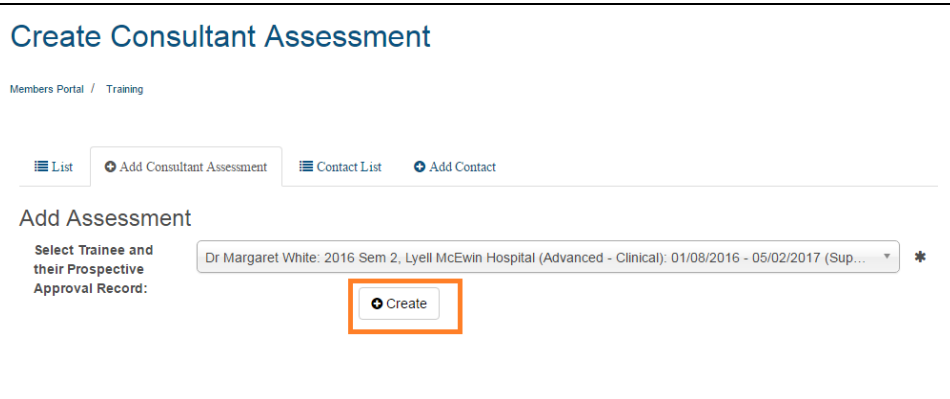
Title	First Name	Last Name	Role	Email	Edit	Delete
Dr	Anthony	Davis	Consultant	ychand@ranzscog.edu.au		
Dr	David	Grey	Consultant	ychand@ranzscog.edu.au		
Dr	Evans	Michael	Consultant	ychand@ranzscog.edu.au		

Items per page 25



- It is important that you enter the correct Email address as the system will be using this to send a link to the Consultant for completing the online Consultant Assessment of Trainee form.

5.2 Create a Survey record

Action	
<p>Click on the Add Consultant Assessment tab</p>	 <p>Consultant Assessments</p> <p>Members Portal / Training / Consultant Assessments</p> <p>List + Add Consultant Assessment Contact List + Add Contact</p> <p>Search</p> <p>No data found.</p>
<p>Click on the drop-down box</p>	 <p>Create Consultant Assessment</p> <p>Members Portal / Training</p> <p>List + Add Consultant Assessment Contact List + Add Contact</p> <p>Add Assessment</p> <p>Select Trainee and their Prospective Approval Record:</p> <p>Select</p> <p>Create</p>
<p>Select a Trainee</p>	 <p>Create Consultant Assessment</p> <p>Members Portal / Training</p> <p>List + Add Consultant Assessment Contact List + Add Contact</p> <p>Add Assessment</p> <p>Select Trainee and their Prospective Approval Record:</p> <p>Select</p> <ul style="list-style-type: none"> Select Dr Fiona Cartwright: 2016 Sem 2, Lyell McEwin Hospital (Core): 01/08/2016 - 05/02/2017 (Supervisor: Dr David Grey), 1.00 FTE Dr Margaret White: 2016 Sem 2, Lyell McEwin Hospital (Advanced - Clinical): 01/08/2016 - 05/02/2017 (Supervisor: Dr David Grey), 1.00 FTE
<p>Click on the Create button</p>	 <p>Create Consultant Assessment</p> <p>Members Portal / Training</p> <p>List + Add Consultant Assessment Contact List + Add Contact</p> <p>Add Assessment</p> <p>Select Trainee and their Prospective Approval Record:</p> <p>Dr Margaret White: 2016 Sem 2, Lyell McEwin Hospital (Advanced - Clinical): 01/08/2016 - 05/02/2017 (Sup...</p> <p>Create</p>
	<p>At this point, the system will create a Survey record and the Status will be New Entry.</p>

Action

Consultant Assessment Details

Members Portal / Training

[List](#)
[Edit Consultant Assessment](#)
[Contact List](#)
[Add Contact](#)

[Print](#)

Advanced Consultant Assessment

Trainee & Training Details

Trainee Fullname:	<input type="text" value="Dr Margaret White"/>	Creation Date:	<input type="text" value="10/11/2016"/>
Hospital:	<input type="text" value="Lyll McEwin Hospital: 01/08/2016 - 05/02/2017"/>	Summative Assessment Due Date:	<input type="text" value="19-03-2017"/>
Training Year:	<input type="text"/>	Status:	<input type="text" value="New Entry"/>
Training Level:	<input type="text"/>	Survey ID:	<input type="text" value="140"/>
Form Type:	<input type="text" value="Advanced"/>	Outcome:	<input type="text" value="Select"/>
Created By:	<input type="text" value="Dr David Grey"/>		
Created ID:	<input type="text" value="19559"/>		

Scroll down and you will see that the system has inherited all your contacts into the Survey. This will happen for each Survey that you create.

Select Consultants and Issue Consultant Assessment of Trainee Forms

My Contact List

Select All	Deselect All	Name	Role	Email	Edit
<input checked="" type="checkbox"/>		Dr Anthony Davis	Consultant	vchand@ranzcog.edu.au	
<input checked="" type="checkbox"/>		Dr David Grey	Consultant	vchand@ranzcog.edu.au	
<input checked="" type="checkbox"/>		Dr Evans Michael	Consultant	vchand@ranzcog.edu.au	

Forms to be completed by:

By default, all your contacts will be pre-selected but you can change the default selection.



- It is important that you select the correct Trainee record. A trainee's Prospective Approval record details will also be displayed to assist you in selecting the correct trainee record.

Add Assessment

Select Trainee and their Prospective Approval Record:

Select

Select

Dr Fiona Cartwright	2016 Sem 2	Lyll McEwin Hospital	(Core)	01/08/2016 - 05/02/2017	(Supervisor: Dr David Grey); 1.00 FTE
Dr Margaret White	2016 Sem 2	Lyll McEwin Hospital	(Advanced - Clinical)	01/08/2016 - 05/02/2017	(Supervisor: Dr David Grey); 1.00 FTE

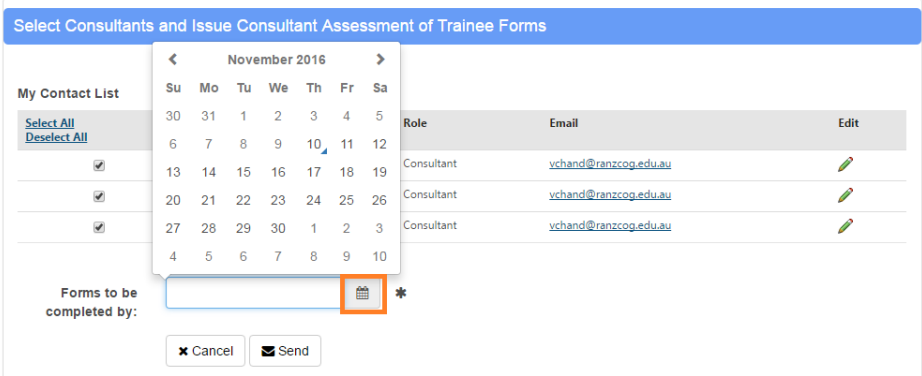
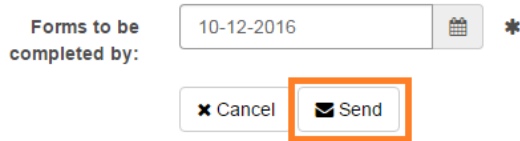
- Selecting a Core record will create a Core Survey and therefore, will issue Core Consultant Assessment of Trainee forms.
- Selecting an Advanced-Clinical record will create an Advanced Survey and therefore, will issue Advanced Consultant Assessment of Trainee forms.

Action

	<ul style="list-style-type: none"> Make sure you select the trainee record with the correct Hospital Training Year and Semester details.
--	---

5.3 Get System to Issue out the Consultant Assessment forms

Action

<p>Click on the Calendar and Enter a Due Date</p>	<p>This is the date by which you need the Consultants to respond to you by.</p> 
<p>Click on Send</p>	<p>Clicking on Send will trigger the system to send an email to each of the contacts selected in the My Contact List.</p>  <p>The first time you successfully send an email, the Status of the Survey will change from New Entry to In-Progress.</p>
<p>An email similar to the following will be sent with a link to the Consultant Assessment form.</p>	<p>Subject: Dr Margaret White's RANZCOG Consultant Assessment of Trainee Form</p> <p>Dear Dr Anthony Davis,</p> <p>You are invited to provide feedback on Dr Margaret White's performance and progress for the Six-monthly Summative Assessment. Feedback forms an integral part of the Six-monthly Summative Assessment, so your participation in this process is very important. To complete the Consultant Assessment of Trainee form, please click on the link below.</p> <p>https://ranzcoг-staging.formition.com/ConsultantAssessmentSurvey/Advanced.aspx?ID=e6tlaXgTILfJ3XRfsIJ+w==</p> <p>Your feedback is confidential and will be de-identified to the trainee.</p> <p>Please submit your responses by 10/12/2016 as the link will expire after that time. If you have any questions or require guidance, please contact the Training Services team by email at training@ranzcoг.edu.au or by telephone on +61 3 9417 1699. Further information about completing the Consultant Assessment form can be found here.</p> <p>Thank you for taking the time to contribute to the Six-Monthly Summative Assessment process.</p> <p>Kind regards, Dr David Grey.</p>

Action



- If you click the Send button on a Core Survey, then the link in the email will open a Core Consultant Assessment of Trainee form.
- If you click the Send button on an Advanced Survey, then the link in the email will open an Advanced Consultant Assessment of Trainee form.
- Make sure that the email addresses of your contacts are updated so they receive the email.
- If a Consultant does not provide feedback by the Due Date, then the link in the email will expire.
- You can issue as many emails from within a Survey while Status is In-Progress and Pending 6-Monthly Submission.
- The Issued column in the List view will reflect the number of emails that you have sent.

List Add Consultant Assessment Contact List Add Contact

Q Search

Survey ID	Trainee Name	Form Type	Status	Outcome	Hospital	SA Due Date	Issued	Received	Used	Edit	Delete
141	Dr Margaret White	Advanced	In Progress		Lyell McEwin Hospital: 01/08/2016 - 05/02/2017	19/03/2017	3	0	0		

Items per page 25

- The Received column indicates the number of Consultants who have provided feedback.

Consultant Assessments

Members Portal / Training / Consultant Assessments



List Add Consultant Assessment Contact List Add Contact

Q Search

Survey ID	Trainee Name	Form Type	Status	Outcome	Hospital	SA Due Date	Issued	Received	Used	Edit	Delete
141	Dr Margaret White	Advanced	In Progress		Lyell McEwin Hospital: 01/08/2016 - 05/02/2017	19/03/2017	3	2	0		

Items per page 25

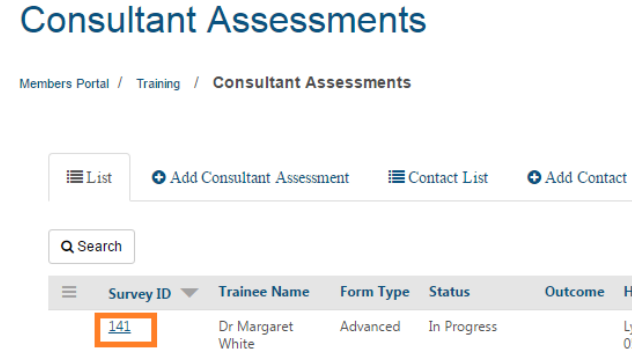
5.4 Check if a Consultant has responded

Action																									
<p>Click on the List tab</p>	 <p>Consultant Assessment Details</p> <p>Members Portal / Training</p> <p>List Edit Consultant Assessment Contact List Add Contact</p>																								
<p>Check the Received column</p>	<p>This column indicates the number of Consultants who have provided feedback.</p>  <p>Consultant Assessments</p> <p>Members Portal / Training / Consultant Assessments</p> <p>List Add Consultant Assessment Contact List Add Contact</p> <p>Q Search</p> <table border="1"> <thead> <tr> <th>Survey ID</th> <th>Trainee Name</th> <th>Form Type</th> <th>Status</th> <th>Outcome</th> <th>Hospital</th> <th>SA Due Date</th> <th>Issued</th> <th>Received</th> <th>Used</th> <th>Edit</th> <th>Delete</th> </tr> </thead> <tbody> <tr> <td>141</td> <td>Dr Margaret White</td> <td>Advanced</td> <td>In Progress</td> <td></td> <td>Lyell McEwin Hospital: 01/08/2016 - 05/02/2017</td> <td>19/03/2017</td> <td>3</td> <td>2</td> <td>0</td> <td></td> <td></td> </tr> </tbody> </table> <p>Items per page 25</p>	Survey ID	Trainee Name	Form Type	Status	Outcome	Hospital	SA Due Date	Issued	Received	Used	Edit	Delete	141	Dr Margaret White	Advanced	In Progress		Lyell McEwin Hospital: 01/08/2016 - 05/02/2017	19/03/2017	3	2	0		
Survey ID	Trainee Name	Form Type	Status	Outcome	Hospital	SA Due Date	Issued	Received	Used	Edit	Delete														
141	Dr Margaret White	Advanced	In Progress		Lyell McEwin Hospital: 01/08/2016 - 05/02/2017	19/03/2017	3	2	0																

5.5 View Consultant Feedback

Trigger

The Received column in List view shows that Consultant(s) have responded.

Action													
<p>Click on the Survey ID to open the record</p>	 <p>Consultant Assessments</p> <p>Members Portal / Training / Consultant Assessments</p> <p>List Add Consultant Assessment Contact List Add Contact</p> <p>Q Search</p> <table border="1"> <thead> <tr> <th>Survey ID</th> <th>Trainee Name</th> <th>Form Type</th> <th>Status</th> <th>Outcome</th> <th>H</th> </tr> </thead> <tbody> <tr> <td>141</td> <td>Dr Margaret White</td> <td>Advanced</td> <td>In Progress</td> <td></td> <td>Ly 05</td> </tr> </tbody> </table>	Survey ID	Trainee Name	Form Type	Status	Outcome	H	141	Dr Margaret White	Advanced	In Progress		Ly 05
Survey ID	Trainee Name	Form Type	Status	Outcome	H								
141	Dr Margaret White	Advanced	In Progress		Ly 05								

Action

Navigate to the Monitor and Select section

Monitor and Select Consultant Responses for Summary section

Select All Deselect All	Feedback ID	Feedback Provider	Date Issued	Due Date	Received	Date Received
<input type="checkbox"/>	538	Dr Evans Michael	10/11/2016	10/12/2016	Yes	10/11/2016
	537	Dr David Grey	10/11/2016	10/12/2016	No	
<input type="checkbox"/>	536	Dr Anthony Davis	10/11/2016	10/12/2016	Yes	10/11/2016
Total Forms Issued:		3	Total Received:		2	

Select the Consultant(s) whose feedback you want to see

Monitor and Select Consultant Responses for Summary section

Select All Deselect All	Feedback ID	Feedback Provider	Date Issued	Due Date	Received	Date Received
<input checked="" type="checkbox"/>	538	Dr Evans Michael	10/11/2016	10/12/2016	Yes	10/11/2016
	537	Dr David Grey	10/11/2016	10/12/2016	No	
<input checked="" type="checkbox"/>	536	Dr Anthony Davis	10/11/2016	10/12/2016	Yes	10/11/2016
Total Forms Issued:		3	Total Received:		2	

Click on the View Consultant Feedback section heading

The View Consultant Feedback will display the responses of all the Consultants that you select in the Monitor and Select section.

Note: Selection of Consultants in the Monitor and Select section will automatically trigger the system to populate the Summary section. This is the process of generating the Summary of Consultant Assessment of Trainee Forms.

View Consultant Feedback

Domain - Clinical Expertise

Competencies	Feedback Provider	Expectation of year level:				Specific qualities/attributes that need further development
		Below	At	Above	Unable to Assess	
Demonstrates responsibility, reliability, and initiative in undertaking clinical and other duties and follow up	Dr Anthony Davis	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
	Dr Evans Michael	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Demonstrates responsibility, reliability and initiative in undertaking research duties	Dr Anthony Davis	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Research trainees ONLY
	Dr Evans Michael	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Research trainees ONLY
Manages clinical load effectively in consultation with other members of the health team	Dr Anthony Davis	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
	Dr Evans Michael	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Demonstrates appropriate obstetric clinical procedural and surgical skills	Dr Anthony Davis	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	
	Dr Evans Michael	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	

The View Consultant Feedback section allows you to view and compare feedback from each Consultant for a particular Survey.



- When you tick a box in the 'Monitor and Select Consultant Responses for Summary' section, the page will refresh. This is done after each tick (selection). Therefore, cross check to ensure that you have not missed selecting a record.

5.6 Complete the Summary of Consultant Assessment of Trainee Forms

Trigger

Supervisor has received a minimum of two Consultant Feedbacks.

Action

Click on the Survey ID to open the record

Survey ID	Trainee Name	Form Type	Status
143	Dr Margaret White	Advanced	In Progress

Select the Feedback records that you want to use

Monitor and Select Consultant Responses for Summary section

Select All / Deselect All	Feedback ID	Feedback Provider	Date Issued	Due Date	Received	Date Received
<input checked="" type="checkbox"/>	543	Dr Evans Michael	11/11/2016	10/12/2016	Yes	11/11/2016
<input checked="" type="checkbox"/>	542	Dr Anthony Davis	11/11/2016	10/12/2016	Yes	11/11/2016

Total Forms Issued: 2 Total Received: 2

Scroll down to the Summary of Consultant Assessment of Trainee Forms section

Summary of Consultant Assessment of Trainee Forms

Number of consultants who have contributed to this assessment

Number who have less than 10 contact hours per four-week period, with the Trainee.	2
Number who have greater than 10 contact hours per four-week period, with the Trainee.	0

Domain - Clinical Expertise

Competencies	Description	Expectation of year level:
		Below At Above Unable to Assess

Enter your comments in the three mandatory comments boxes in this section

Areas of strength and/or suggestions for development as highlighted by the consultants, other assessors and your own observations within the relevant domains. Please give examples of specific competencies.

1000 characters remaining

Click on Submit to save and confirm your changes

After clicking on the Submit button, Status of the Survey will change to 'Pending 6-Monthly Submission'.

Action

Survey ID	Trainee Name	Form Type	Status	Outcome	Hospital	SA Due Date	Issued	Received	Used	Edit	Delete
143	Dr Margaret White	Advanced	Pending 6-Monthly Submission	Satisfactory	Lyell McEwin Hospital: 01/08/2016 - 05/02/2017	19/03/2017	2	2	0		



Tips

- Once you have clicked on the Submit button, you can open the corresponding Trainee’s Six-monthly Summative Assessment and select the submitted Survey from within the Six-monthly Summative Assessment.
- Once you have submitted a Survey and Status changes to ‘Pending 6-Monthly Submission’, you can continue to update the existing Survey by:
 - Including more incoming feedback (by selecting more records in the Monitor and Select section); and
 - Updating comments in the Summary of Consultant Assessment of Trainee Forms section;
- Once you have submitted a Survey and the Status is ‘Pending 6-Monthly Submission’, you can continue to send more emails to consultants in your Contact List and then select the feedback records in the Survey upon receipt.
- If you update the ‘Summary of Consultant Assessment of Trainee Forms’ after you have ‘submitted’ the Survey, and click ‘submit’, all updates to the Summary of Consultant Assessment of Trainee Forms section will be automatically transferred to the Six-monthly Summative Assessment in which you have selected (included) the Survey.