



6-Monthly
Summative Assessment
User Manual

Trainee Guide

Table of Contents

- 1 Overview 3
- 2 Access 3
 - 2.1 How do I access the system? 3
- 3 Browser Compatibility 3
- 4 6-Monthly Summative Assessment Process 4
 - 4.1 Introduction 4
 - 4.2 Workflow and Access Control 4
- 5 Trainee’s Interaction with the System 6
 - 5.1 Initiate your 6-Monthly Summative Assessment 6
 - 5.2 Review your Supervisor’s Assessment and Submit your Summative Assessment to the Regional Office
11

1 Overview

The new online 6-Monthly Summative Assessment process enables FRANZCOG trainees to submit their 6-Monthly Summative Assessment online. The Supervisor, Regional Office and Regional TAC Chair review and approval process will also be completed online.


Through the online system, trainees will be able to track the progress of their online 6-Monthly Summative Assessments.

2 Access

2.1 How do I access the system?

The 6-Monthly Summative Assessment is available online and can be accessed via the same link that is currently used to access the online Logbook at <https://logbook.my.ranzcog.edu.au>

You can also navigate to the online 6-Monthly Summative Assessment by visiting the RANZCOG website, selecting Education and Training, Specialist Training and then clicking on 'LOGIN Online Portfolio' (on the left hand side menu).

 <p>Tips</p>	<ul style="list-style-type: none"> • Click on the 'Forgotten Password?' link underneath the green 'Login' button if you don't remember your password. You will be sent an email with a link to reset your password. • The password reset link expires after 12 hours. If you have not reset your password within 12 hours, you will need to click on the 'Forgotten Password' link again. • Resetting a password in the Logbook system <i>will not</i> reset the <i>my.ranzcog</i> password. It is therefore possible to have a different password for the Logbook system and <i>my.ranzcog</i>.
------------------------------------------------------------------------------------------------------	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

3 Browser Compatibility

The 6-Monthly Summative Assessment process will function as expected in the latest versions of:

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

Note: The online 6-Monthly Summative Assessment process 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 a version earlier than IE10.

4 6-Monthly Summative Assessment Process

4.1 Introduction

Trainees need to initiate the 6-Monthly Summative Assessment via the 'Appraisals & Assessments' link under the 'Training' menu item, which is similar to creating the 3-Monthly Formative Appraisal. Once the process has been completed, Trainees must submit the Assessment online.

The system records the date on which trainees submit their 6-Monthly Summative Assessment to the Regional Office. If the date of submission is after the due date for the Summative Assessment, the Summative Assessment will be marked as an 'Overdue Submission' and the time for the 6-month period will not be credited.

4.2 Workflow and Access Control

The system controls a user's access to the 6-Monthly Summative Assessment by identifying the status of the assessment and the role of the assigned user.

The table below indicates who can access and update the 6-Monthly Summative Assessment at each stage of the process.

<u>Summative Assessment Process</u>	<u>Status of Summative Assessment</u>	<u>Who can update the Summative Assessment</u>
<ol style="list-style-type: none"> 1. Trainee initiates the Summative Assessment. 2. The system creates the Summative Assessment. Status is "New Entry". 3. Trainee records their self-assessment and submits the 6-Monthly Summative Assessment. 	New Entry	Trainee
<ol style="list-style-type: none"> 4. The assessment is assigned to the Supervisor based on the Prospective Approval selected to create the assessment. Status changes to "Awaiting Supervisor Submission". 5. Following discussion with the trainee, the Supervisor completes the assessment. 6. Supervisor submits the 6-Monthly Summative Assessment. 	Awaiting Supervisor Submission	Supervisor
<ol style="list-style-type: none"> 7. The assessment is assigned back to the Trainee. Status changes to "Awaiting Trainee Submission". 8. Trainee reviews the Supervisor's assessment and completes their declaration that their Training Supervisor has discussed the Summative Assessment with them. 9. Trainee submits the assessment. 10. The system determines if the assessment is an overdue submission. 	Awaiting Trainee Submission	Trainee
<ol style="list-style-type: none"> 11. The assessment is assigned to the trainee's Regional Office. Status changes to "Awaiting Regional Review". 12. The Regional Office reviews the 6-Monthly Summative Assessment and assigns the Summative Assessment to the TAC Chair or Deputy Chair depending on the Chair's 	Awaiting Regional Review	Regional Office

availability or assigns the assessment to the Regional/NZ TA Committee if the Supervisor has referred the assessment to the Committee.		
<p>13. If assigned to a Chair, the Status will change to “Awaiting Chair Review” and the Chair will complete the assessment.</p> <p>14. The Chair can also send the assessment back to the Regional Office if they need more information in order to complete the assessment. If the assessment is assigned back to the Regional Office, the status of the assessment will change to “Awaiting Regional Review” and the process will continue from this stage.</p>	Awaiting Chair Review	TAC Chair or Deputy Chair
15. If assigned to the Committee, the Status will change to “Awaiting Committee Review” and the Regional Office will complete the assessment following an assessment/decision by the Committee.	Awaiting Committee Review	Regional Office
<p>16. Once assessment is completed, Status changes to Completed.</p> <p>17. The Outcome is visible in the List view.</p>	Completed	College Admin only

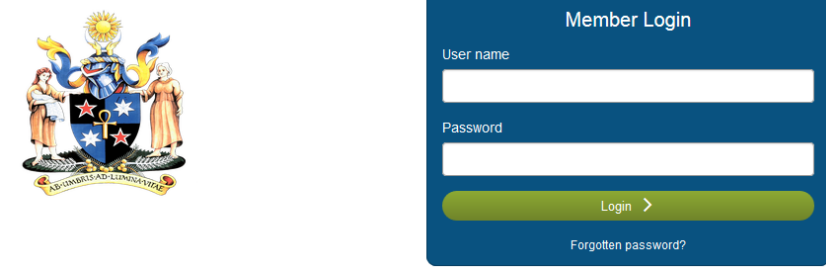
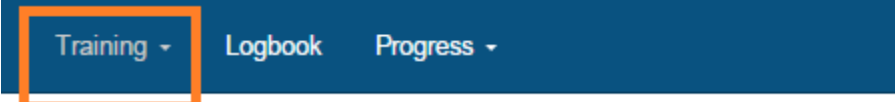
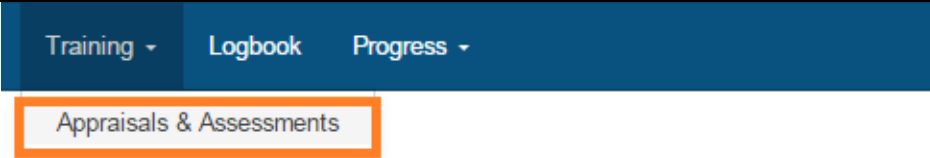
5 Trainee’s Interaction with the System

5.1 Initiate your 6-Monthly Summative Assessment

Trigger

It is time for trainees to begin the Summative Assessment process

Action

<p>Sign in to the Online Portfolio</p>	<p>Login</p> <p>Members Portal /</p>  <p>The screenshot shows the 'Members Portal / Login' page. On the left is the national coat of arms of South Africa. On the right is a 'Member Login' form with fields for 'User name' and 'Password', a 'Login >' button, and a 'Forgotten password?' link.</p>
<p>Click on the Training menu</p>	 <p>The screenshot shows a dark blue navigation bar with three items: 'Training' (highlighted with an orange box), 'Logbook', and 'Progress'.</p>
<p>Click on the Appraisals & Assessments menu</p>	 <p>The screenshot shows the same navigation bar as above, but with 'Appraisals & Assessments' highlighted in a light grey box below the 'Training' menu item.</p>

<p>You will be navigated to the Appraisals & Assessments page</p>	<p>Appraisals & Assessments</p> <p>Members Portal / Training / Appraisals & Assessments</p> <p>List Add 3-Monthly Add 6-Monthly</p> <p>Q Search</p> <table border="1"> <thead> <tr> <th>ID</th> <th>Record Type</th> <th>Form Type</th> <th>Status</th> <th>Overdue Submission</th> <th>Outcome</th> <th>Assessment Date</th> <th>Hospital Name</th> <th>Hospital Start Date</th> <th>Hospital End Date</th> </tr> </thead> <tbody> <tr> <td>219</td> <td>3-Monthly</td> <td>Core</td> <td>Completed</td> <td>No</td> <td>Complete</td> <td>17/05/2016</td> <td>Toowoomba Hospital</td> <td>01/02/2016</td> <td>31/07/2016</td> </tr> </tbody> </table> <p>Items per page 25</p>	ID	Record Type	Form Type	Status	Overdue Submission	Outcome	Assessment Date	Hospital Name	Hospital Start Date	Hospital End Date	219	3-Monthly	Core	Completed	No	Complete	17/05/2016	Toowoomba Hospital	01/02/2016	31/07/2016
ID	Record Type	Form Type	Status	Overdue Submission	Outcome	Assessment Date	Hospital Name	Hospital Start Date	Hospital End Date												
219	3-Monthly	Core	Completed	No	Complete	17/05/2016	Toowoomba Hospital	01/02/2016	31/07/2016												
<p>Click on Add 6-Monthly</p>	<p>Appraisals & Assessments</p> <p>Members Portal / Training / Appraisals & Assessments</p> <p>List Add 3-Monthly Add 6-Monthly</p>																				
<p>Click on the Select Prospective Approval (PA) drop-down menu to select the relevant Prospective Approval record</p>	<p>Select the relevant training period for which you are initiating the 6-Monthly Summative Assessment.</p> <p>List Add 3-Monthly</p> <p>Add Appraisal / Assessment</p> <p>Select Prospective Approval Record: Select *</p> <p>Create</p> <p>The Prospective Approval record that you select determines the type of Summative Assessment that you are presented with (Core or Advanced).</p> <p>The Prospective Approval record also determines the Training Supervisor who will be completing your appraisal as the Summative Assessment will be assigned to the Training Supervisor recorded on the selected Prospective Approval record.</p> <p>If you are undertaking Core and Advanced Training within one semester, you will need to have separate Core and Advanced Summative Assessments completed. Therefore, you will have to create separate assessments by selecting a Core Prospective Approval to create a Core Summative Assessment and then selecting an Advanced Prospective Approval to create an Advanced Summative Assessment.</p>																				
<p>Click on the Create button</p>	<p>Add Assessment / Assessment</p> <p>Select Prospective Approval Record: 2016 Sem 1, Toowoomba</p> <p>Create</p>																				
<p>You will be presented with the 6-Monthly Summative Assessment Form</p>	<p>Features of the form:</p> <ol style="list-style-type: none"> 1. The 'Trainee & Training Details' section is a read-only section. Initially, this section will have some blank fields as not all data has been migrated into the new online system. 																				

Trainee & Training Details

Trainee Fullname:

Region:

Current Training Year:

Hospital:

FTE:

Training Level:

Initiated By:

Outcome:

Assign Supervisor:

Supervisor Fullname:

Assessment Date: *

Due Date: *

Status:

Overdue Submission:

Recent 6-Monthly Assessment:

Summative Assessment ID:

2. The Assessment Date field is populated with the current date and can be updated by Trainees when Status = New Entry and by Supervisors when Status = Awaiting Supervisor Submission.
3. The Due Date for the submission of the Summative Assessment is predetermined by the College for each Semester. The due date is usually 6 weeks after the end of a semester.
4. All mandatory fields will have an asterisk. The system will not accept the form until all mandatory fields are completed.

Logbook entries *

5. A link is available to navigate to your Progress Summary page to review a numerical summary of Logbook entries and the Additional Requirements dashboard.

Progress Summary, Logbook and Activities

- [Progress Summary](#)
- [Trainee's Logbook Entries](#)
- [Trainee's Activities](#)

6. Links are also available for you to navigate to the Logbook List and Additional Requirements List pages to ensure that your Logbook, Additional Requirements and Professional Development Leave entries are up-to-date.
7. The Declaration fields at the bottom of the form will be disabled when a trainee first creates the 6-Monthly Summative Assessment form.

Declaration

I have discussed this Summative Assessment with the Trainee.

My Training Supervisor has discussed this Summative Assessment with me.


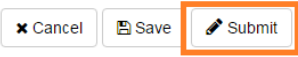
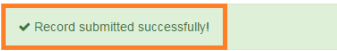
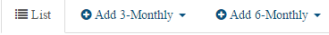


The first declaration is for the Supervisor to complete after the Trainee submits the 6-Monthly Summative Assessment.

8. Where relevant, Trainees can upload supporting documentation for their Supervisor, Regional Office and Chair to review. Trainees should note that any attachments they upload can be accessed by their Supervisors, Regional Office and their Deputy and Regional TAC Chairs.

Attachments

Action	Date	Title	Added by

9. Trainees can save the Summative Assessment multiple times prior to

	<p>submitting. Once submitted, updates are not permitted.</p> <p></p>																				
<p>Ensure all your training records are up to date and complete the Trainee Checklist Declaration</p>	<p>1. You are required to complete the following mandatory Trainee Checklist Declaration:</p> <p>Trainee Checklist Declaration</p> <p>I certify that I have reviewed the following training entries for this semester and that the entries are a true and accurate record of my training</p> <ul style="list-style-type: none"> <input type="checkbox"/> Logbook entries * <input type="checkbox"/> Additional Requirements * <input type="checkbox"/> Professional Development Leave * <input type="checkbox"/> Leave * <p>As a result, make sure that all entries are recorded accurately including:</p> <ol style="list-style-type: none"> a. All Unreviewed Logbook entries relevant to the semester being assessed; b. All Unreviewed Activity records including those where you are claiming Professional Development Leave (PDL); c. All Mandatory Workshops and Climate Modules relevant to the semester being assessed for which you are claiming PDL; and d. All Unreviewed Leave records relevant to the semester being assessed. <p>2. When your Supervisor gets access to your Summative Assessment, they will also have access to all your Logbook, Activity, PDL and Leave records and will be required to review your Logbook entries and Approve/Reject your Activity, PDL and Leave records. Therefore, it is critical that these records are up-to-date. Use the following links to add and update relevant entries:</p> <ul style="list-style-type: none"> • Trainee's Logbook Entries • Trainee's Activities 																				
<p>Submit your Summative Assessment to your Supervisor by clicking Submit</p>	<p>Click Submit.</p> <p></p> <p>Upon submission, a confirmation message will be displayed.</p> <p>Appraisals & Assessments</p> <p>Members Portal / Training / Appraisals & Assessments</p> <p></p> <p></p> <p>Once submitted, the form will be assigned to the Supervisor.</p>																				
<p> Tips</p>	<ul style="list-style-type: none"> • There is no Auto-Save. Please save your assessment frequently so you don't lose what you have typed. • The List view will display the Summative Assessment as a line item. <p></p> <p><input type="text" value="Search"/></p> <table border="1"> <thead> <tr> <th>ID</th> <th>Record Type</th> <th>Form Type</th> <th>Status</th> <th>Overdue Submission</th> <th>Outcome</th> <th>Assessment Date</th> <th>Hospital Name</th> <th>Hospital Start Date</th> <th>Hospital End Date</th> </tr> </thead> <tbody> <tr> <td>226</td> <td>6-Monthly</td> <td>Core</td> <td>Awaiting Supervisor Submission</td> <td></td> <td></td> <td>22/07/2016</td> <td>Toowoomba Hospital</td> <td>01/02/2016</td> <td>31/07/2016</td> </tr> </tbody> </table>	ID	Record Type	Form Type	Status	Overdue Submission	Outcome	Assessment Date	Hospital Name	Hospital Start Date	Hospital End Date	226	6-Monthly	Core	Awaiting Supervisor Submission			22/07/2016	Toowoomba Hospital	01/02/2016	31/07/2016
ID	Record Type	Form Type	Status	Overdue Submission	Outcome	Assessment Date	Hospital Name	Hospital Start Date	Hospital End Date												
226	6-Monthly	Core	Awaiting Supervisor Submission			22/07/2016	Toowoomba Hospital	01/02/2016	31/07/2016												

- The Status of the 6-Monthly Summative Assessment will be displayed.

ID	Record Type	Form Type	Status	Overdue Submission	Outcome	Assessment Date	Hospital Name	Hospital Start Date	Hospital End Date
236	6-Monthly	Core	Awaiting Supervisor Submission			22/07/2016	Toowoomba Hospital	01/02/2016	31/07/2016

- The Summative Assessment ID is a hyperlink to the 6-Monthly Summative Assessment and will open the assessment in a new tab.

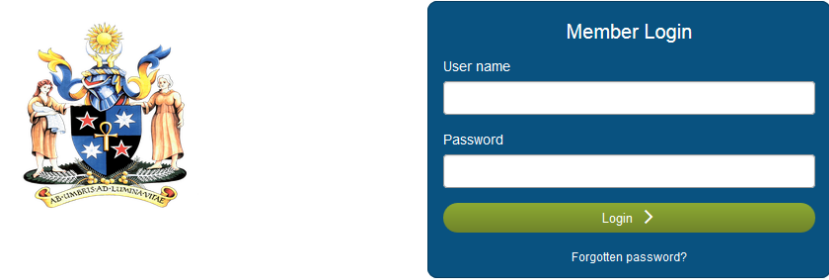
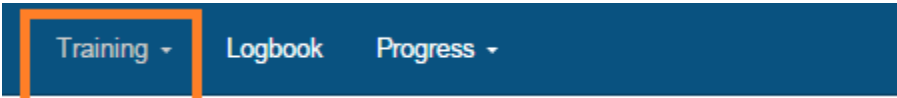
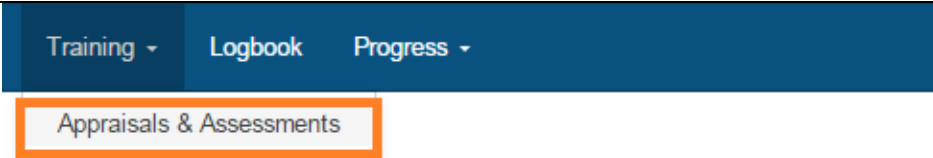
ID	Record Type	Form Type	Status	Overdue Submission	Outcome	Assessment Date	Hospital Name	Hospital Start Date	Hospital End Date
236	6-Monthly	Core	Awaiting Supervisor Submission			22/07/2016	Toowoomba Hospital	01/02/2016	31/07/2016

5.2 Review your Supervisor’s Assessment and Submit your Summative Assessment to the Regional Office

Trigger

Supervisor has completed a trainee’s Summative Assessment.

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 Appraisals & Assessments menu</p>																
<p>Click on the ID hyperlink for Summative Assessment where Status = “Awaiting Trainee Submission”</p>	<p>Appraisals & Assessments</p> <p>Members Portal / Training / Appraisals & Assessments</p> <p>List Add 3-Monthly Add 6-Monthly</p> <p>Search</p> <table border="1"> <thead> <tr> <th>ID</th> <th>Record Type</th> <th>Form Type</th> <th>Status</th> <th>Overdue Submission</th> </tr> </thead> <tbody> <tr> <td>236</td> <td>6-Monthly</td> <td>Core</td> <td>Awaiting Trainee Submission</td> <td></td> </tr> <tr> <td>219</td> <td>3-Monthly</td> <td>Core</td> <td>Completed</td> <td>No</td> </tr> </tbody> </table>	ID	Record Type	Form Type	Status	Overdue Submission	236	6-Monthly	Core	Awaiting Trainee Submission		219	3-Monthly	Core	Completed	No
ID	Record Type	Form Type	Status	Overdue Submission												
236	6-Monthly	Core	Awaiting Trainee Submission													
219	3-Monthly	Core	Completed	No												
<p>Review all PDL entries assessed by your Supervisor</p>	<p>If you claimed for PDL on the Additional Requirements page for events such as Activities, Mandatory Workshops etc, then the records will be presented to your Supervisor for approval.</p> <p>Supervisors can approve, reject or mark a record as unapproved. “Unapproved” means that they can neither approve nor reject an entry and the unapproved records will be followed up by your Regional Office.</p> <p>Supervisors will see a view similar to the following when status is “Awaiting</p>															

Action																					
	<p>Summative Assessment of Trainee's Progress and Performance</p> <p>Please download the template to complete the Final Summary and attach it to this assessment. Final Summary Template</p> <table border="1"> <thead> <tr> <th>Action</th> <th>Date</th> <th>Title</th> <th>Added by</th> </tr> </thead> <tbody> <tr> <td></td> <td>28-07-2016</td> <td>Final Summary</td> <td>Dr Susan Taylor</td> </tr> </tbody> </table> <p>Please record the outcome from the Final Summary. *</p> <p><input checked="" type="checkbox"/> Satisfactory Or <input type="checkbox"/> Referred for review to Regional/NZ TA Committee*</p> <p>*If referred to Regional TA Committee due to Trainee being rated BELOW expectation in relevant competencies, a Learning Development Plan (LDP) MUST be uploaded in the Attachments section for this Summative assessment. The LDP can be download from here: Learning Development Plan</p>	Action	Date	Title	Added by		28-07-2016	Final Summary	Dr Susan Taylor												
Action	Date	Title	Added by																		
	28-07-2016	Final Summary	Dr Susan Taylor																		
<p>Review your Supervisor's comments</p>	<p>Supervisor Comments</p>																				
<p>Review your Supervisor's Declaration</p>	<p>Declaration</p> <p><input checked="" type="checkbox"/> I have discussed this Formative Appraisal with the Trainee *</p> <p><input type="checkbox"/> My Training Supervisor has discussed this Formative Appraisal with me *</p>																				
<p>Complete the Trainee Declaration</p>	<p>Declaration</p> <p><input checked="" type="checkbox"/> I have discussed this Formative Appraisal with the Trainee *</p> <p><input type="checkbox"/> My Training Supervisor has discussed this Formative Appraisal with me *</p>																				
<p>Submit your Summative Assessment to the Regional Office by clicking on the Submit button</p>	<p> <input type="button" value="Cancel"/> <input type="button" value="Save"/> <input checked="" type="button" value="Submit"/> </p> <p>Upon submission, a confirmation message will be displayed. At this point, the system will determine if your submission is overdue.</p> <p>Record submitted successfully!</p> <p>List <input type="button" value="Add 3-Monthly"/> <input type="button" value="Add 6-Monthly"/></p> <p>Search</p> <table border="1"> <thead> <tr> <th>ID</th> <th>Record Type</th> <th>Form Type</th> <th>Status</th> <th>Overdue Submission</th> <th>Outcome</th> <th>Assessment Date</th> <th>Hospital Name</th> <th>Hospital Start Date</th> <th>Hospital End Date</th> </tr> </thead> <tbody> <tr> <td>236</td> <td>6-Monthly</td> <td>Core</td> <td>Awaiting Regional Review</td> <td>No</td> <td></td> <td>22/07/2016</td> <td>Toowoomba Hospital</td> <td>01/02/2016</td> <td>31/07/2016</td> </tr> </tbody> </table> <p>Once you submit the Summative Assessment, it will be assigned to your Regional Office and you will continue to have view access. You will not be able to update any information on the form.</p>	ID	Record Type	Form Type	Status	Overdue Submission	Outcome	Assessment Date	Hospital Name	Hospital Start Date	Hospital End Date	236	6-Monthly	Core	Awaiting Regional Review	No		22/07/2016	Toowoomba Hospital	01/02/2016	31/07/2016
ID	Record Type	Form Type	Status	Overdue Submission	Outcome	Assessment Date	Hospital Name	Hospital Start Date	Hospital End Date												
236	6-Monthly	Core	Awaiting Regional Review	No		22/07/2016	Toowoomba Hospital	01/02/2016	31/07/2016												