



3-Monthly Formative Appraisal  
User Manual

Trainee Guide

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## 1 Overview

The new online 3-Monthly Formative Appraisal process provides a facility for FRANZCOG trainees to submit their 3-Monthly Formative Appraisal self-assessment online. The Supervisor review, Regional Office review and Regional TAC Chair approval processes will also be completed online.

Through the online system, trainees will be able to track the progress of their 3-Monthly Formative Appraisals that have been initiated online.


## 2 Access

### 2.1 How do I get access?

Trainees will be informed by SMS when the 3-Monthly Formative Appraisal is available online. The 3-Monthly Formative Appraisal will be available via the same link that is currently used to access the online Logbook.

The link to the online 3-Monthly Formative Appraisal is <https://logbook.my.ranzcog.edu.au>

You can also navigate to the online 3-Monthly Formative Appraisal 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><b>Tips</b></p>	<ul style="list-style-type: none"> <li>• Click on the 'Forgotten Password?' link beneath the green 'Login' button if you don't remember your password. You will be sent an email with a link to reset your password.</li> <li>• 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.</li> <li>• Resetting a password in the Logbook system <i>will not</i> reset the <i>my.ranzcog</i> password.</li> <li>• It is possible to have a different password for the Logbook system and <i>my.ranzcog</i>.</li> </ul>
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## 3 Browser Compatibility

The 3-Monthly Formative Appraisal process will function as expected in the latest versions of:

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

**Note:** The online 3-Monthly Formative Appraisal 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 an earlier version than IE10.

## 4 3-Monthly Formative Appraisal Process

### 4.1 Introduction

Trainees need to initiate the 3-Monthly Formative Appraisal via the 'Appraisals & Assessments' link under the 'Training' menu item.

The system records the date on which trainees submit their 3-Monthly Formative Appraisal to the Regional Office. If the date of submission is after the due date for the Formative Appraisal, the Formative Appraisal will be marked as an 'Overdue Submission'. If the 3-Monthly Formative Appraisal is submitted as overdue, time for the 3-month period will not be credited.

### 4.2 Workflow and Access Control

The system controls user access to the 3-Monthly Formative Appraisal form by identifying the status of the record and the assigned user.

The table below indicates who can access and update the 3-Monthly Formative Appraisal at each stage of the process.

<b><u>Formative Appraisal Process</u></b>	<b><u>Status of Formative Appraisal</u></b>	<b><u>Who can update the Formative Appraisal</u></b>
1. Trainee initiates the Formative Appraisal. 2. The system creates the Formative Appraisal form. Status is "New Entry". 3. Trainee records their self-assessment and submits the 3-Monthly Formative Appraisal. After submitting the form, the trainee will not be able to edit their comments.	New Entry	Trainee
4. The form is assigned to the Supervisor based on the relevant Prospective Approval. Status changes to "Awaiting Supervisor Submission". 5. Following discussion with the trainee, the Supervisor enters their comments and completes the Supervisor Declaration. 6. Supervisor submits the 3 Monthly Formative Appraisal.	Awaiting Supervisor Submission	Supervisor
7. The form is assigned to the Trainee. Status changes to "Awaiting Trainee Submission". 8. Trainee reviews the Supervisor's comments and completes their declaration that their Training Supervisor has discussed the Formative Appraisal with them. 9. Trainee submits the form.	Awaiting Trainee Submission	Trainee
10. The form is assigned to the trainee's Regional Office. Status changes to "Awaiting Regional Review". 11. The Regional Office reviews the 3 Monthly Formative Appraisal and assigns the Formative Appraisal to the TAC Chair or Deputy Chair depending on availability.	Awaiting Regional Review	Regional Office
12. Status changes to "Awaiting Chair Review". 13. The Chair reviews the 3 Monthly Formative Appraisal and	Awaiting Chair Review	Regional TAC Chair or Deputy Chair

marks it as Complete or Incomplete.		
14. After submission by the Chair, Status of the Formative Appraisal changes to Completed. 15. The Outcome is visible in the List view.	Completed	College Admin only


## 5 Trainee's Interaction with the System

### 5.1 Initiate a 3-Monthly Formative Appraisal

#### Trigger

Conclusion of first three months of a semester.

#### Action

Sign in to the Logbook system	<p><b>Login</b></p> <p>Members Portal /</p>  <div> <p>Member Login</p> <p>User name</p> <input type="text"/> <p>Password</p> <input type="password"/> <p>Login &gt;</p> <p><a href="#">Forgotten password?</a></p> </div>
Click on the Training menu	<div> <p>Training ▾</p> <p>Logbook</p> <p>Progress ▾</p> </div>
Click on the Appraisals & Assessments menu	<div> <p>Training ▾</p> <p>Logbook</p> <p>Progress ▾</p> <p>Appraisals &amp; Assessments</p> </div>

**You will be navigated to the Appraisals & Assessments page**

## Appraisals & Assessments

Members Portal / Training / Appraisals & Assessments

ID	Record Type	Form Type	Assessment Date	Supervisor ID	Supervisor Name	Hospital Start Date	Hospital End Date	Region	Status	Overdue	Outcome	Edi

Items per page 25

**Click on Add 3-Monthly**

## Appraisals & Assessments

Members Portal / Training / Appraisals & Assessments

**Click on the Select Prospective Approval (PA) drop-down menu to select the relevant Prospective Approval record**

Select the relevant training period for which you are initiating the 3-Monthly Formative Appraisal.

### Add Appraisal / Assessment

Select Prospective Approval Record:

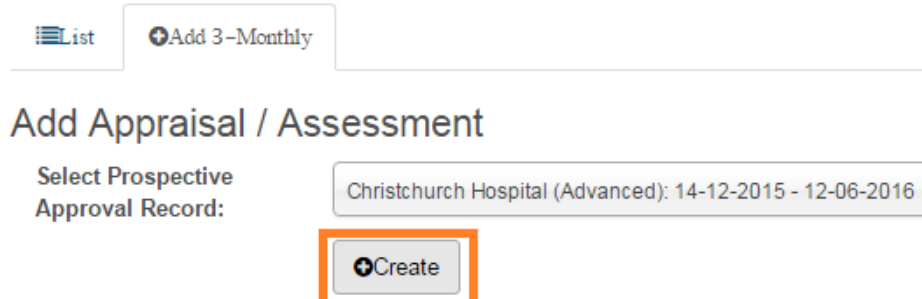
The Prospective Approval record that you select determines the type of Formative Appraisal that you are presented with (Core or Advanced).

The Prospective Approval record also determines the Training Supervisor who will be completing your appraisal as the Formative Appraisal will be assigned to the Training Supervisor recorded on the selected Prospective Approval record.

In a semester, trainees might be training at different hospitals or doing Advanced-Clinical and Advanced-Research training. The system allows trainees to select the Prospective Approval record and request their respective Training Supervisors to complete their Formative Appraisal.

It is not mandatory that trainees complete a Formative Appraisal for all Prospective Approval records. Some trainees will have the same Supervisor for Advanced-Clinical and Advanced-Research Prospective Approval records, therefore two appraisals are not necessary. However, if you have multiple Prospective Approval records for the same training period with different Training Supervisors, you might want to complete two Formative Appraisals.

Click on the Create button



**Add Appraisal / Assessment**

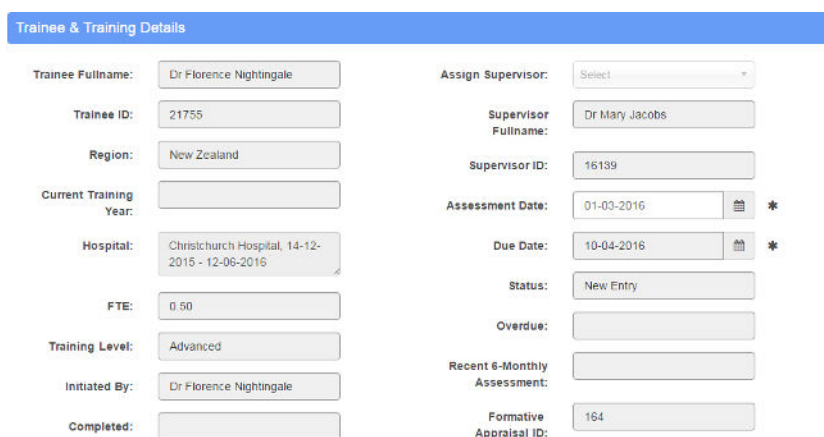
Select Prospective Approval Record: Christchurch Hospital (Advanced): 14-12-2015 - 12-06-2016

**Create**

You will be presented with the 3-Monthly Formative Appraisal Form

Features of the form:

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: Dr Florence Nightingale

Trainee ID: 21755

Region: New Zealand

Current Training Year:

Hospital: Christchurch Hospital, 14-12-2015 - 12-06-2016

FTE: 0.50

Training Level: Advanced

Initiated By: Dr Florence Nightingale

Completed:

Assign Supervisor: Select

Supervisor Fullname: Dr Mary Jacobs

Supervisor ID: 16139

Assessment Date: 01-03-2016 \*

Due Date: 10-04-2016 \*

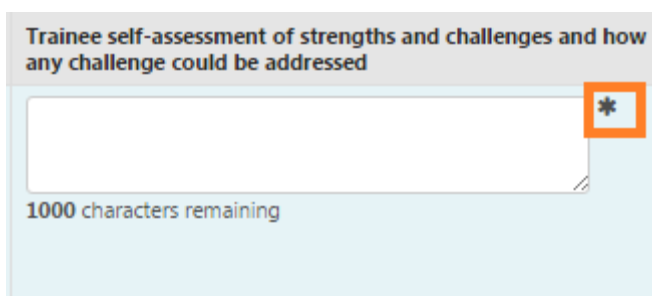
Status: New Entry

Overdue:

Recent 6-Monthly Assessment:

Formative Appraisal ID: 164

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 Formative Appraisal is predefined by the College for each Semester. The due date is usually 4 weeks after the end of the 3 Month training period.
4. All mandatory fields will have an asterisk. The system will not accept the form until all mandatory fields are completed.



**Trainee self-assessment of strengths and challenges and how any challenge could be addressed**

1000 characters remaining

5. Upon creation of the Formative Appraisal, the Status will be "New Entry".



## Trainee &amp; Training Details

Trainee Fullname:	Dr Florence Nightingale	Assign Supervisor:	Select
Trainee ID:	21755	Supervisor Fullname:	Dr Mary Jacobs
Region:	New Zealand	Supervisor ID:	16139
Current Training Year:		Assessment Date:	01-03-2016 *
Hospital:	Christchurch Hospital, 14-12-2015 - 12-06-2016	Due Date:	10-04-2016 *
FTE:	0.50	Status:	New Entry
Training Level:	Advanced	Overdue:	
Initiated By:	Dr Florence Nightingale	Recent 6-Monthly Assessment:	
Completed:		Formative Appraisal ID:	164

6. The Declaration fields at the bottom of the form will be disabled and protected when a trainee first creates the 3 Monthly Formative Appraisal form.

## Declaration

☒ I have discussed this Formative Appraisal with the Trainee

☐ My Training Supervisor has discussed this Formative Appraisal with me

The first declaration is for the Supervisor to complete after the Trainee submits the 3 Monthly Formative Appraisal.

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

## Attachments

[+Add Attachment](#)

Action	Date	Title	Added by

8. Trainees can save the Formative Appraisal multiple times prior to submitting. Once submitted, updates to the trainee comments fields are not permitted.

[✕ Cancel](#) [💾 Save](#) [✍ Submit](#)

## Enter your comments

### 3-Monthly Appraisal (Formative)

#### Trainee Comments

##### Clinical Expertise

Competencies	Description	Trainee self-assessment of strengths and challenges and how any challenge could be addressed
Demonstrates responsibility, reliability and initiative in undertaking clinical and other duties and follow up	Demonstrates an ability to: <ul style="list-style-type: none"> <li>• prioritise urgent and other tasks</li> <li>• deal with allotted duties</li> <li>• manage clinics and ward</li> <li>• organise appropriate testing and follow up of test results</li> <li>• provide a safe and effective management plan</li> </ul>	<div>1000 characters remaining</div>
Manages clinical load effectively in consultation with other members of the health care team	Demonstrates an ability to: <ul style="list-style-type: none"> <li>• consult effectively with senior staff and other health professionals where necessary</li> <li>• manage work load effectively in different clinical settings</li> <li>• consult with and manage multi-disciplinary health care services</li> </ul>	<div>1000 characters remaining</div>
Demonstrates appropriate obstetric clinical procedural and surgical skills	Demonstrates an ability to: <ul style="list-style-type: none"> <li>• proficiently manage and technically perform routine obstetric procedures</li> <li>• identify and proficiently manage obstetric complications</li> <li>• seek assistance from appropriate specialist colleagues</li> </ul>	<div>1000 characters remaining</div>
Demonstrates appropriate obstetric non-procedural skills	Demonstrates an ability to: <ul style="list-style-type: none"> <li>• organise routine obstetric examinations, investigations and appropriate tests</li> </ul>	<div>1000 characters remaining</div>
Demonstrates appropriate gynaecological clinical procedural and surgical skills	Demonstrates an ability to: <ul style="list-style-type: none"> <li>• proficiently manage and technically perform routine</li> </ul>	<div>1000 characters remaining</div>

## Submit your Formative Appraisal to your Supervisor by clicking Submit

Click Submit.

✕ Cancel
💾 Save
📝 Submit

Upon submission, a confirmation message will be displayed.

## Appraisals & Assessments

Members Portal / Training / Appraisals & Assessments

✓ Record submitted successfully!

List Add 3-Monthly

Search

ID	Record Type	Form Type	Status	Overdue	Outcome	Assessment Date	Hospital Name	Hospital Start Date	Hospital End Date	Region
164	3-Monthly	Advanced	Awaiting Supervisor Submission			01/03/2016	Christchurch Hospital	14/12/2015	12/06/2016	NZ

Once submitted, the form will be assigned to the Supervisor. Trainees will have view access only.



## Tips

- There is no Auto-Save. Please save your comments frequently so you don't lose what you have typed in the Appraisal.
- The List view will display the Formative Appraisal as a line item.

## Appraisals & Assessments

Members Portal / Training / Appraisals & Assessments

✓ Record submitted successfully!

List Add 3-Monthly

Search

ID	Record Type	Form Type	Status	Overdue	Outcome	Assessment Date	Hospital Name	Hospital Start Date	Hospital End Date	Region
164	3-Monthly	Advanced	Awaiting Supervisor Submission			01/03/2016	Christchurch Hospital	14/12/2015	12/06/2016	NZ

- The Status of the 3 Monthly Formative Appraisal will be displayed.

List Add 3-Monthly

Search

ID	Record Type	Form Type	Status	Overdue	Outcome	Assessment Date	Hospital Name	Hospital Start Date	Hospital End Date	Region
<a href="#">164</a>	3-Monthly	Advanced	Awaiting Supervisor Submission			01/03/2016	Christchurch Hospital	14/12/2015	12/06/2016	NZ

- The Formative Appraisal ID is a hyperlink to the 3 Monthly Formative Appraisal form.

List Add 3-Monthly

Search


ID	Record Type	Form Type	Status	Overdue	Outcome	Assessment Date	Hospital Name	Hospital Start Date	Hospital End Date	Region
<a href="#">164</a>	3-Monthly	Advanced	Awaiting Supervisor Submission			01/03/2016	Christchurch Hospital	14/12/2015	12/06/2016	NZ

## 5.2 Review Supervisor's Comments and Submit Formative Appraisal to the Regional Office

### Trigger

Supervisor has submitted a trainee's Formative Appraisal

### Action

Sign in to the Logbook system	<div><div>Login</div><div>Members Portal /</div><div><div></div><div><div>Member Login</div><div>User name</div><div></div><div>Password</div><div></div><div>Login &gt;</div><div>Forgotten password?</div></div></div></div>																								
Click on the Training menu	<div><div>Training ▾</div><div>Logbook</div><div>Progress ▾</div></div>																								
Click on the Appraisals & Assessments menu	<div><div>Training ▾</div><div>Logbook</div><div>Progress ▾</div><div>Appraisals &amp; Assessments</div></div>																								
Click on the ID hyperlink for Formative Appraisal where Status = “Awaiting Trainee Submission”	<div><div>Appraisals &amp; Assessments</div><div>Members Portal / Training / Appraisals &amp; Assessments</div><div><div><div><div></div><div>List</div></div><div>Add 3-Monthly ▾</div></div><div><div>Q Search</div></div><table><tr><th>ID</th><th>Record Type</th><th>Form Type</th><th>Status</th><th>Overdue</th><th>Outcome</th><th>Assessment Date</th><th>Hospital Name</th><th>Hospital Start Date</th><th>Hospital End Date</th><th>Region</th><th>Supervisor Name</th></tr><tr><td>164</td><td>3-Monthly</td><td>Advanced</td><td>Awaiting Trainee Submission</td><td></td><td></td><td>01/03/2016</td><td>Christchurch Hospital</td><td>14/12/2015</td><td>12/06/2016</td><td>NZ</td><td>Dr Mary Jacobs</td></tr></table></div></div>	ID	Record Type	Form Type	Status	Overdue	Outcome	Assessment Date	Hospital Name	Hospital Start Date	Hospital End Date	Region	Supervisor Name	164	3-Monthly	Advanced	Awaiting Trainee Submission			01/03/2016	Christchurch Hospital	14/12/2015	12/06/2016	NZ	Dr Mary Jacobs
ID	Record Type	Form Type	Status	Overdue	Outcome	Assessment Date	Hospital Name	Hospital Start Date	Hospital End Date	Region	Supervisor Name														
164	3-Monthly	Advanced	Awaiting Trainee Submission			01/03/2016	Christchurch Hospital	14/12/2015	12/06/2016	NZ	Dr Mary Jacobs														
Review your Supervisor’s Comments	<div><div>Supervisor Comments</div><div>Training Supervisor comments including any actions to address identified areas for improvement</div><div><div>Clinical Expertise</div><div>As a Supervisor, my assessment of the trainee is as follows:</div><div>a.</div><div>Academic Abilities</div><div>As a Supervisor, my assessment of the trainee is as follows:</div><div>a.</div><div>Professional Qualities</div><div>As a Supervisor, my assessment of the trainee is as follows:</div><div>a.</div></div></div>																								
Review your Supervisor’s Declaration	<div><div>Declaration</div><div><div><input checked="" type="checkbox"/> I have discussed this Formative Appraisal with the Trainee *</div><div><input type="checkbox"/> My Training Supervisor has discussed this Formative Appraisal with me *</div></div></div>																								

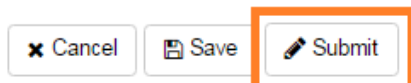
## Action

## Complete the Trainee Declaration

## Declaration

- ☒ I have discussed this Formative Appraisal with the Trainee \*
- ☐ My Training Supervisor has discussed this Formative Appraisal with me \*

## Submit your Formative Appraisal to the Regional Office by clicking on the Submit button



Upon submission, a confirmation message will be displayed.

## Appraisals &amp; Assessments

Members Portal / Training / Appraisals & Assessments

✓ Record submitted successfully!

List Add 3-Monthly ▾

Search

ID	Record Type	Form Type	Status	Overdue	Outcome	Assessment Date	Hospital Name	Hospital Start Date	Hospital End Date	Region	Supervisor Name
164	3-Monthly	Advanced	Awaiting Regional Review	No		01/03/2016	Christchurch Hospital	14/12/2015	12/06/2016	NZ	Dr Mary Jacobs

Once you submit the Formative Appraisal to your Regional Office, you will continue to have view access. You will not be able to update any information on the form.



Tips

- If you do not agree with your Supervisor's comments, discuss this with your Supervisor. The Supervisor's comments cannot be updated, however, you can initiate another Formative Appraisal if your Supervisor has agreed to complete another one.

## 6 Change Password

### Trigger

You know your current password and want to change it.

### Action

Click on your name to access the profile menu

Desktop view:

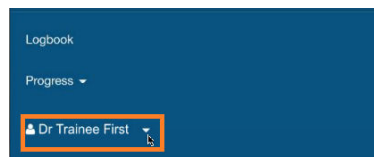


Mobile View:

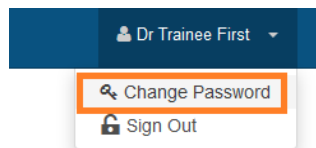
1. Click on highlighted icon



2. Click on your name



Click on 'Change Password'



Enter your existing password

### Change Password

Members Portal / Member / Change Password

Your existing password:

New password:

Password strength:

Confirm password:

Change password

Action	
Enter your new password	<p><b>Change Password</b></p> <p><a href="#">Members Portal</a> / <a href="#">Member</a> / <a href="#">Change Password</a></p> <p>Your existing password:</p> <input type="password"/> <p>New password:</p> <input type="password"/> <p>Password strength:</p> <p>Confirm password:</p> <input type="password"/> <p><a href="#">Change password</a></p>
Enter your new password again	<p><b>Change Password</b></p> <p><a href="#">Members Portal</a> / <a href="#">Member</a> / <a href="#">Change Password</a></p> <p>Your existing password:</p> <input type="password"/> <p>New password:</p> <input type="password"/> <p>Password strength:</p> <p>Confirm password:</p> <input type="password"/> <p><a href="#">Change password</a></p>
Click on the 'Change password' button	<p><b>Change Password</b></p> <p><a href="#">Members Portal</a> / <a href="#">Member</a> / <a href="#">Change Password</a></p> <p>Your existing password:</p> <input type="password"/> <p>New password:</p> <input type="password"/> <p>Password strength:</p> <p>Confirm password:</p> <input type="password"/> <p><a href="#">Change password</a></p>
Check for confirmation message	The following message should be displayed as a confirmation for the password change:

Action

Change Password

Members Portal / Member / Change Password

Password successfully changed.

Your existing password:

New password:

Password strength:

Confirm password:

Change password