

# Understanding trainee summary dashboards and timelines

A guide for trainers and administrators

16 Steps

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Created by

WDAT

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## STEP 1

If you have more than one role (e.g. you are both an educational supervisor and a TPD), you will have more than one dashboard view available to you.

## STEP 2

To switch your dashboard view click on the dashboard title and select the dashboard view you wish to use from the drop down list

The screenshot displays the RCR e-portfolio dashboard interface. At the top, there is a navigation bar with the RCR logo, 'kaizen rise/advance' branding, and a 'Dashboard' tab. A dropdown menu is open under the 'Dashboard' tab, showing two options: 'Supervisor dashboard' (highlighted with a red box) and 'Training Programme Director Dashboard'. The main content area shows the profile of 'Amy Marks' with a 'View profile' button. Below the profile, there are sections for 'Current information', 'Locations', and 'Clinical Supervisor, Training Programme Director - Clinical Radiology, Educational Supervisor - Clinical Radiology'. At the bottom, there are four widget panels: 'Inbox' with a 'Go to my inbox' button, 'Create a new event' with 'MySelf' and 'Someone else' buttons, 'My Trainees' listing 'TestCR1 TestCR1' and 'TestCR4 TestCR4', and 'E-portfolio support' with a 'Become an examiner' button.

### STEP 3

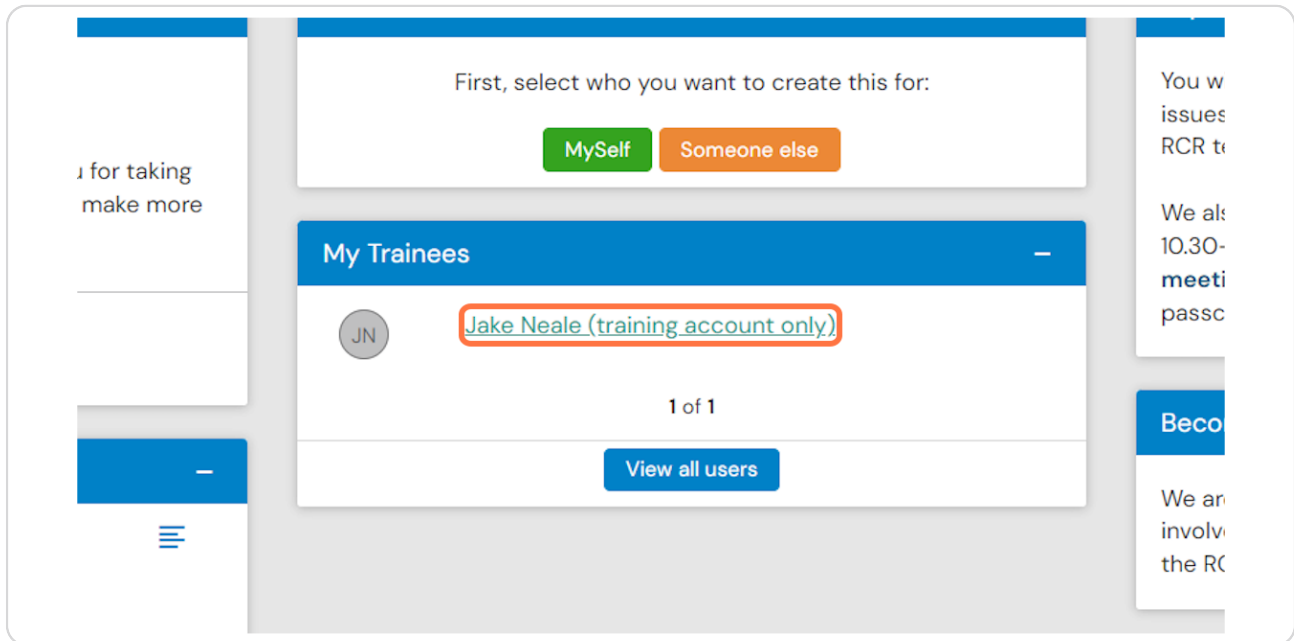
## You can view a list of your linked trainees from your dashboard

You will see a list of trainees linked to the dashboard role you have selected. You may need to switch your dashboard view to see all trainees linked to you under a different role. Alternatively you can click on View all users to see a full list of all trainees connected to you.

The screenshot shows the RCR dashboard interface. At the top, there are navigation tabs: Dashboard, Timeline, Documents, Content, Reports, and User management. The main content area is titled 'Profile' and displays the name 'Amy Marks (training account only)' with a 'View profile' button. Below this, there is a section for 'Current information' and 'Locations', including 'West Midlands - West Midlands Radiology Training Scheme (WMD926)'. The 'Educational Supervisor' role is listed as 'Clinical Radiology, Invited Assessor, Assessor'. On the left side, there is an 'Inbox' section with a 'Go to my inbox' button and a 'To do list' section with a task 'Ultrasound Case Study for Jake'. In the center, there is a 'Create a new event' section with 'MySelf' and 'Someone else' options, and a 'My Trainees' section. The 'My Trainees' section is highlighted with a red box and contains a list with one entry: 'Jake Neale (training account only)' with a 'View all users' button below it. On the right side, there is an 'E-portfolio support' section with information about user guides, FAQs, and a weekly e-portfolio clinic. At the bottom right, there is a 'Become an examiner' section with information about opportunities for doctors.

## STEP 4

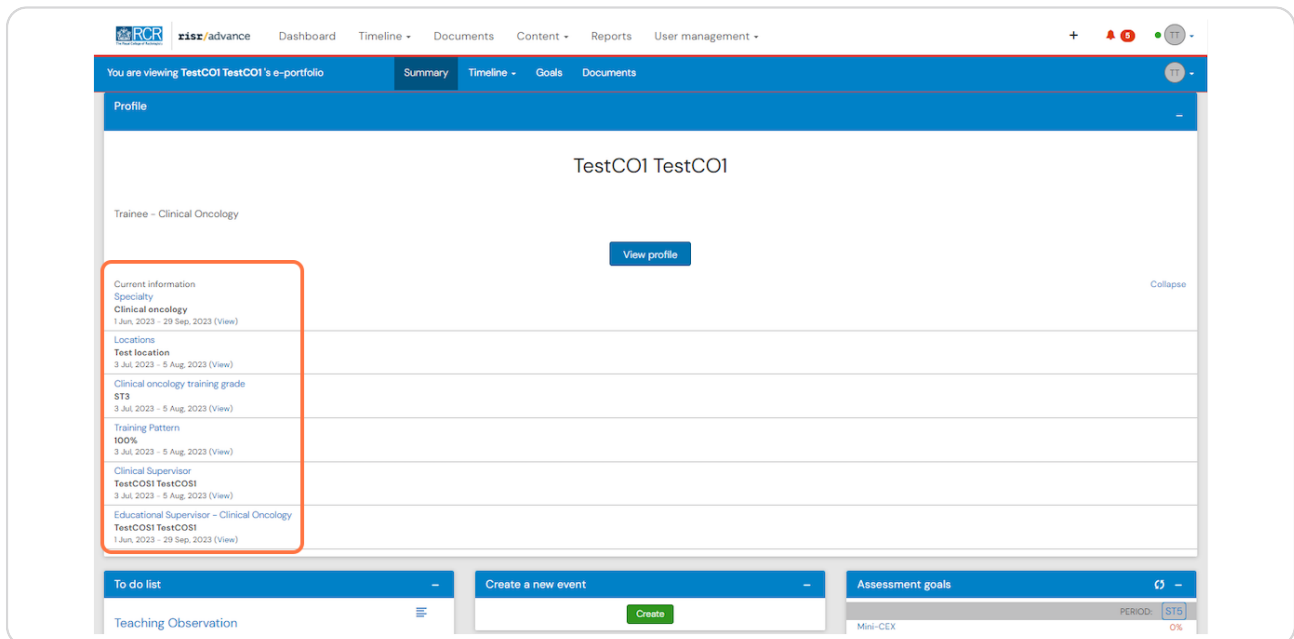
Clicking on a trainee's name will take you to their summary dashboard



## STEP 5

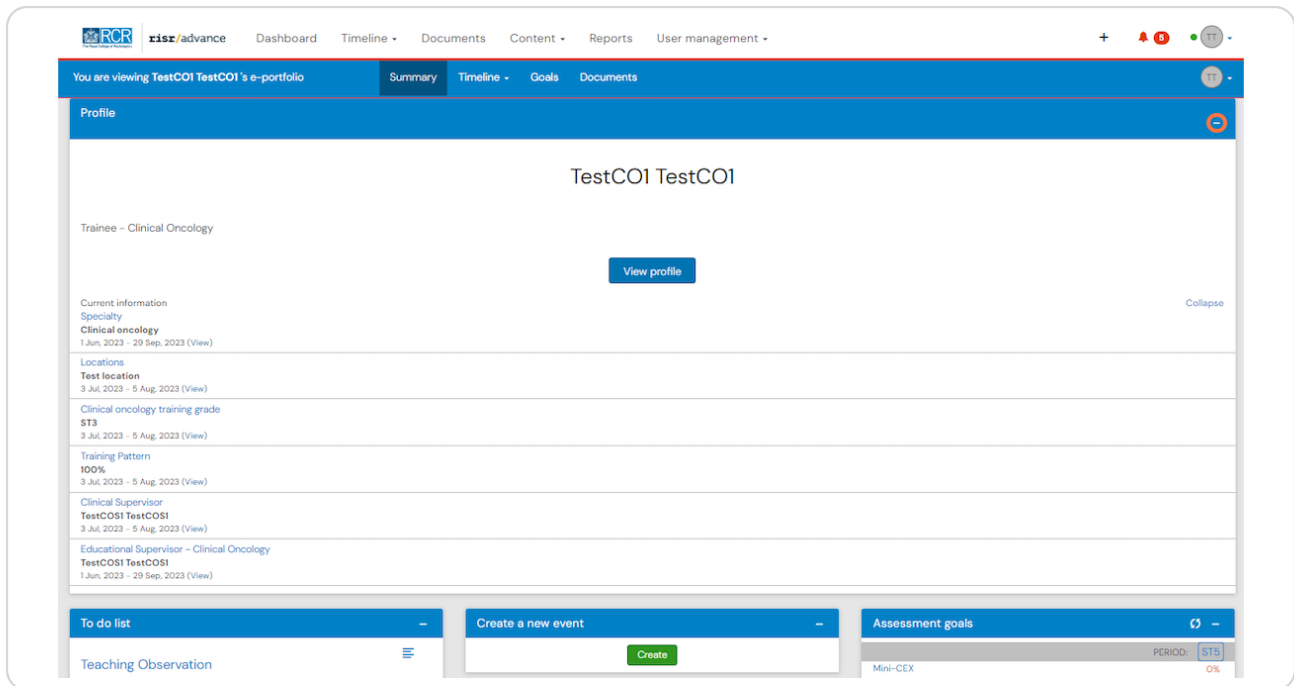
The trainee summary dashboard provides an overview of key information

The profile tile will show current information relating to their training



## STEP 6

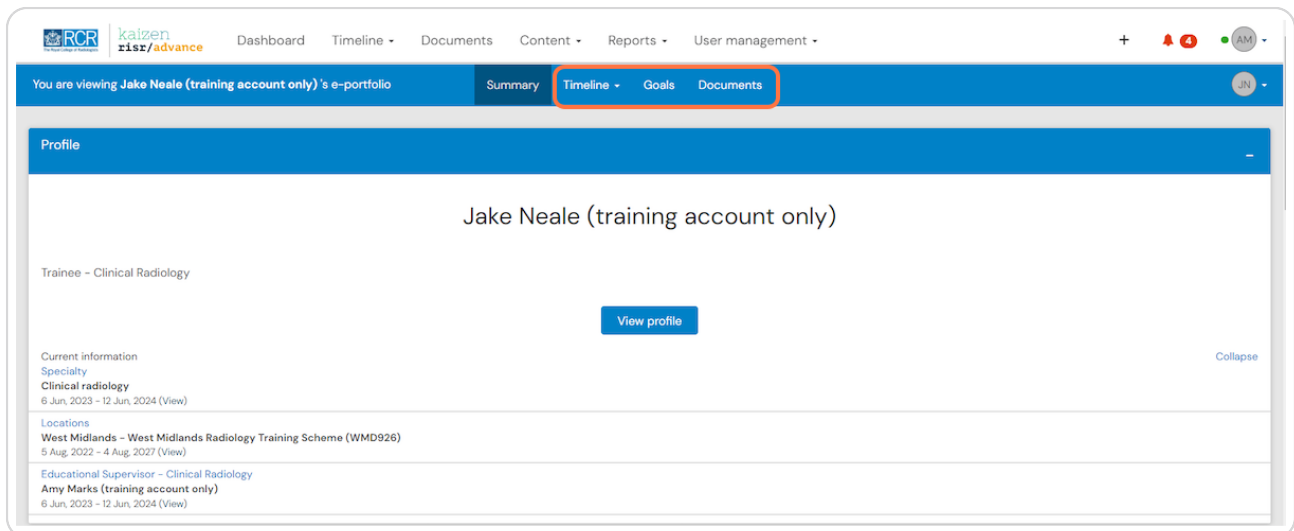
You can collapse tiles by clicking on the - button in the title bar of any tile



The screenshot shows the RCR e-portfolio interface for a trainee named TestCOI TestCOI. The top navigation bar includes 'Summary', 'Timeline', 'Goals', and 'Documents'. The main content area displays the trainee's profile, including their current information, locations, training pattern, and educational supervisor. Below the profile, there are three tiles: 'To do list', 'Create a new event', and 'Assessment goals'. The 'To do list' tile has a minus sign in its title bar, indicating it can be collapsed.

## STEP 7

You can view the trainee's timeline, goals or documents by clicking on these options in the blue bar at the top of their summary dashboard



The screenshot shows the RCR e-portfolio interface for a trainee named Jake Neale (training account only). The top navigation bar includes 'Summary', 'Timeline', 'Goals', and 'Documents'. The 'Timeline', 'Goals', and 'Documents' options are highlighted with a red box, indicating they can be clicked to view the trainee's timeline, goals, or documents. The main content area displays the trainee's profile, including their current information, locations, and educational supervisor.

## STEP 8

From the summary dashboard you can create assessments or reports for the trainee by clicking on Create

Clinical oncology training grade  
ST3  
3 Jul, 2023 - 5 Aug, 2023 (View)

Training Pattern  
100%  
3 Jul, 2023 - 5 Aug, 2023 (View)

Clinical Supervisor  
TestCO1 TestCO1  
3 Jul, 2023 - 5 Aug, 2023 (View)

Educational Supervisor - Clinical Oncology  
TestCO1 TestCO1  
1 Jun, 2023 - 29 Sep, 2023 (View)

**To do list**

- Teaching Observation  
● ● ● ● ● ● ● ● ● ●  
CREATED ON: 14 JUL, 2023  
Awaiting your action
- Educational supervision report  
● ● ● ● ● ● ● ● ● ●  
CREATED ON: 14 JUL, 2023  
Awaiting your action

**Create a new event**

Create

**Assessment goals**

	PERIOD:	STB
Mini-CEX		0%
CBD		0%
MSF		0%
DORPS		0%
DOST		0%
ACAT		0%
QIPAT - 2 to be completed at any point in training		0%
Teaching observation		0%

## STEP 9

You can view your to do list for this trainee on the left of the summary dashboard

Clicking on an event will open it's full view. You can also click on the preview icon to the right to view the event without navigating away from the dashboard

RCR | rizz/advance | Dashboard | Timeline | Documents | Content | Reports | User management

You are viewing TestCO1 TestCO1's e-portfolio | Summary | Timeline | Goals | Documents

**Profile**

**To do list**

- Teaching Observation  
● ● ● ● ● ● ● ● ● ●  
CREATED ON: 14 JUL, 2023  
Awaiting your action
- Educational supervision report  
● ● ● ● ● ● ● ● ● ●  
CREATED ON: 14 JUL, 2023  
Awaiting your action
- Clinical supervision report  
● ● ● ● ● ● ● ● ● ●  
CREATED ON: 14 JUL, 2023  
Awaiting your action
- Clinical supervision report  
● ● ● ● ● ● ● ● ● ●  
CREATED ON: 14 JUL, 2023  
Awaiting your action
- Multiple consultant report (MCR) for TestCO2 TestCO2  
● ● ● ● ● ● ● ● ● ●  
CREATED ON: 3 JUL, 2023  
Awaiting your action

1 - 5 of 5

**Create a new event**

Create

**Assessment goals**

	PERIOD:	STB
Mini-CEX		0%
CBD		0%
MSF		0%
DORPS		0%
DOST		0%
ACAT		0%
QIPAT - 2 to be completed at any point in training		0%
Teaching observation		0%

**An overview of all your goals**

Pass FRCR Part 2	0%
Complete QIPAT test	0%
Test	0%
Attend a bake off	0%

## STEP 10

You can view an overview of the trainee's goals on the right of the summary dashboard

Clicking on a goal will open it's full view.

The screenshot shows the RCR e-portfolio interface. The top navigation bar includes 'Dashboard', 'Timeline', 'Documents', 'Content', 'Reports', and 'User management'. The main header indicates 'You are viewing TestCOI TestCOI's e-portfolio' and has tabs for 'Summary', 'Timeline', 'Goals', and 'Documents'. The 'Assessment goals' section is highlighted with an orange box and lists the following goals with their completion percentages:

Goal	PERIOD	Completion
Mini-CEX	ST5	0%
CBD		0%
MSF		0%
DORPS		0%
DOST		0%
ACAT		0%
QIPAT - 2 to be completed at any point in training		0%
Teaching observation		0%

## # Viewing the trainee's timeline

6 Steps

## STEP 11

Clicking on Timeline in the blue bar will allow you to see all events created by the trainee

The screenshot shows the RCR e-portfolio interface with the 'Timeline' tab selected. The main header indicates 'You are viewing Jake Neale (training account only)' and has tabs for 'Summary', 'Timeline', 'Goals', and 'Documents'. The profile section displays the following information:

**Jake Neale (training account only)**

Trainee - Clinical Radiology

[View profile](#)

**Current information**

Speciality  
Clinical radiology  
6 Jun, 2023 - 12 Jun, 2024 (View)

Locations  
West Midlands - West Midlands Radiology Training Scheme (WMD926)  
5 Aug, 2022 - 4 Aug, 2027 (View)

Educational Supervisor - Clinical Radiology  
Amy Marks (training account only)  
6 Jun, 2023 - 12 Jun, 2024 (View)

The 'Assessment goals' section is also visible, listing the following goals with their completion percentages:

Goal	PERIOD	Completion
FRCR 1 - Anatomy	ST1	0%
FRCR 1 - Physics		0%
Mini-IPX		0%
Rad-DOPS		0%
MSF		0%
Teaching Observation		0%
QIPAT		0%

## STEP 12

You can change the order in which you view events using the filter at the top of the events list and complete an advanced search of the trainee's events using the search box on the right hand side of the screen

Goals and documents will be listed in the same way on their summary screens and can be filtered and searched in the same way

The screenshot shows the RCR e-portfolio interface for Jake Neale. The top navigation bar includes Dashboard, Timeline, Documents, Content, Reports, and User management. The main header indicates the user is viewing Jake Neale's e-portfolio. The timeline section shows a list of events, with a dropdown menu set to 'Ordered by date created'. The 'Advanced search' panel on the right is highlighted in orange and contains fields for Event type, State, Date after, Date before, Clinical radiology capabilities in practice, Clinical radiology milestones and procedures, and Interventional radiology milestones and procedures.

## STEP 13

You can choose to view the full timeline by selecting Timeline from the drop down list, or you can choose to view events by category

The screenshot shows the RCR e-portfolio interface for TestCRI1 TestCRI1. The top navigation bar includes Dashboard, Timeline, Documents, Content, Reports, and User management. The main header indicates the user is viewing TestCRI1 TestCRI1's e-portfolio. The timeline section shows a list of events, with a dropdown menu set to 'Timeline'. The 'Assessment goals' table on the right is visible, showing various goals and their completion percentages.

Start date	End date	Post details	Training grade	Training pattern	Preview
Jun 12, 2023	Jun 12, 2023	Sickness, Test location, Test training programme 1	ST1	100%	Preview
Jun 12, 2023	Aug 19, 2023	Sickness, Test location, Test training programme 1	ST1	100%	Preview

Assessment goals	PERIOD:	ST1	Others
FRCR 1 – Anatomy			
FRCR 1 – Physics			
Mini-IPX			0%
Rad-DOPS			17%
MSF			0%
Teaching Observation			0%
QIPAT			0%



## STEP 14

The timeline view will show you any items the trainee has sent you that are awaiting your action at the top

The screenshot shows the RCR e-portfolio interface for Jake Neale. The main content area displays a list of 29 events, ordered by date created. The top five items are highlighted with a red border:

- CR Educational Supervisor's Structured Report – for use with 2021 Curriculum (CREATED ON: 3 OCT, 2022)
- Educational Supervisors Structured Report (CREATED ON: 28 JUN, 2022)
- CR Educational Supervisor: Annual Induction Appraisal – for use with 2021 Curriculum (CREATED ON: 27 JUN, 2022)
- CR Educational Supervisor's Structured Report – for use with 2021 Curriculum (CREATED ON: 16 MAR, 2022)
- CR Educational Supervisor: Annual Induction Appraisal – for use with 2021 Curriculum (CREATED ON: 16 MAR, 2022)

## STEP 15

You can view events that are awaiting a response from other users

The dots show the progress of these events

The screenshot shows a list of events in the RCR e-portfolio. The events are:

- Educational supervision report**: Awaiting response from TestCOSI TestCOSI. Progress: 1 green dot, 1 orange dot, 1 grey dot.
- Clinical supervision report**: Awaiting response from TestCOSI TestCOSI. Progress: 1 green dot, 1 orange dot, 1 grey dot, 1 grey dot, 1 grey dot.
- Clinical supervision report**: Awaiting response from TestCOSI TestCOSI. Progress: 1 green dot, 1 orange dot, 1 grey dot, 1 grey dot, 1 grey dot, 1 grey dot.
- Assign educational supervisor and specialty**: Progress: 1 green dot.

## STEP 16

Completed events are shown with a green bar to the left

Clinical supervision report 	 CREATED ON: 14 JUL 2023 Awaiting response from TestCOSI TestCOSI
<small>You are currently working on a response to this event. <a href="#">Click here to fill in</a></small>	
<a href="#">Show audit log</a>	<a href="#">Preview</a>
Assign educational supervisor and specialty	 CREATED ON: 14 JUL 2023
<a href="#">Show audit log</a>	<a href="#">Preview</a>
Assign training post, OOPA, or period of leave 	 CREATED ON: 14 JUL 2023
<a href="#">Show audit log</a>	<a href="#">Preview</a>

