Understanding trainee summary dashboards and timelines

A guide for trainers and administrators

16 Steps

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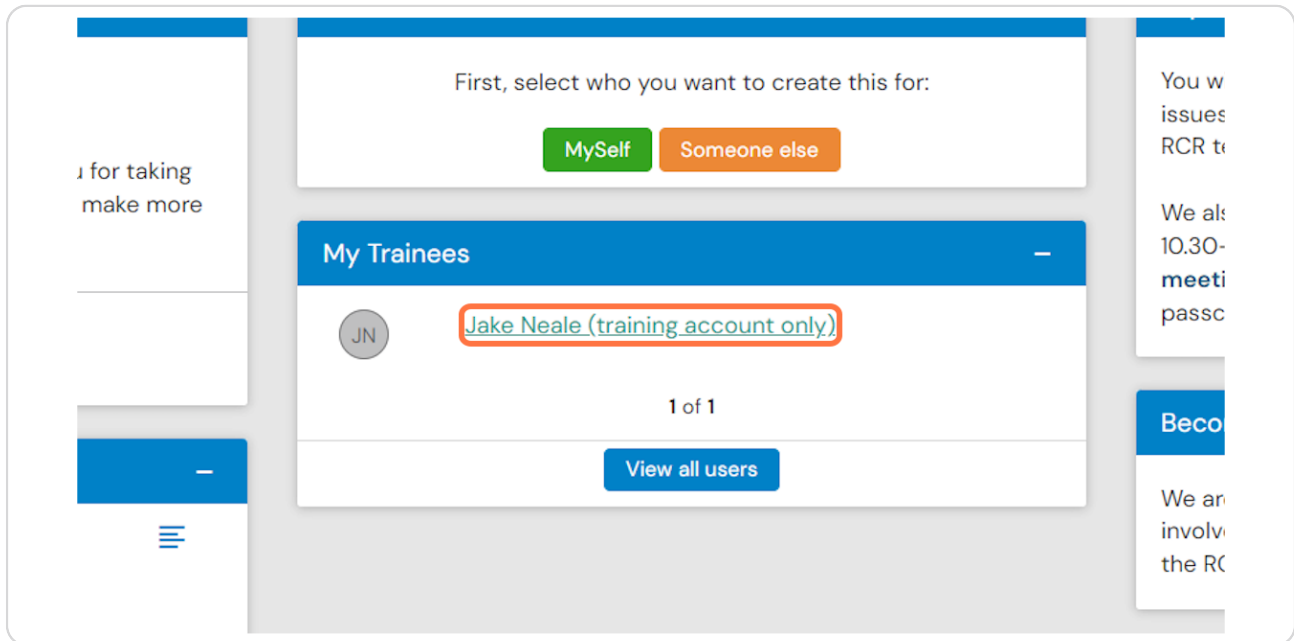
You can view a list of your linked trainees from your dashboard

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.
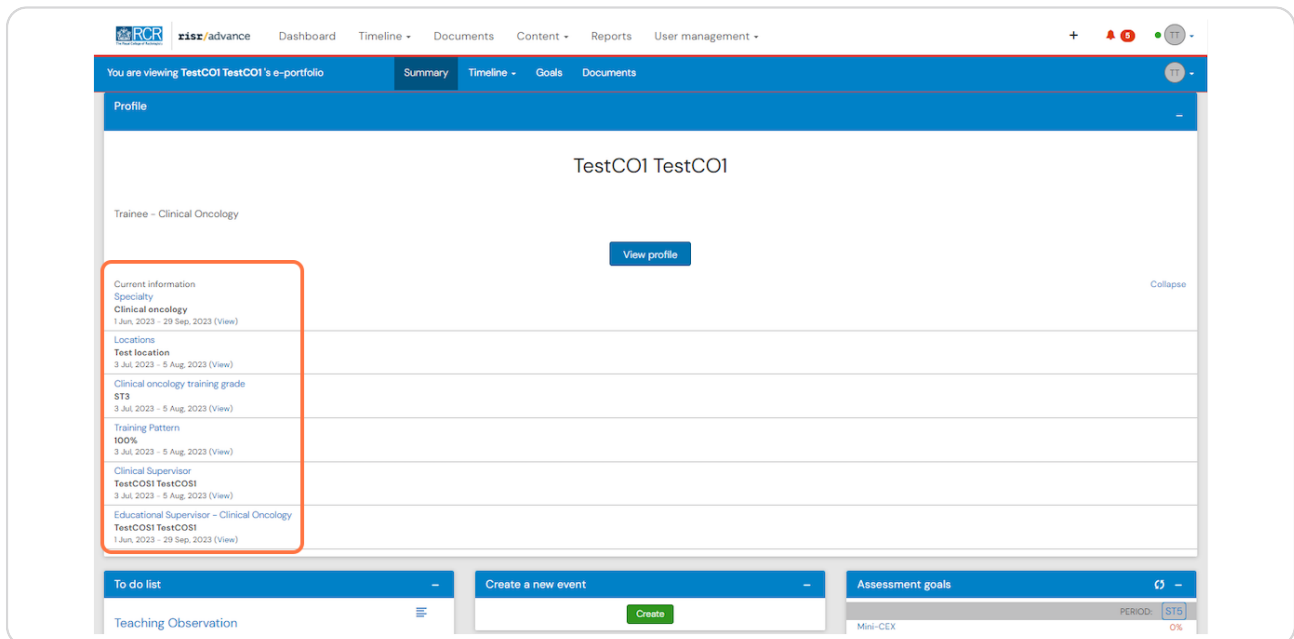
STEP 4

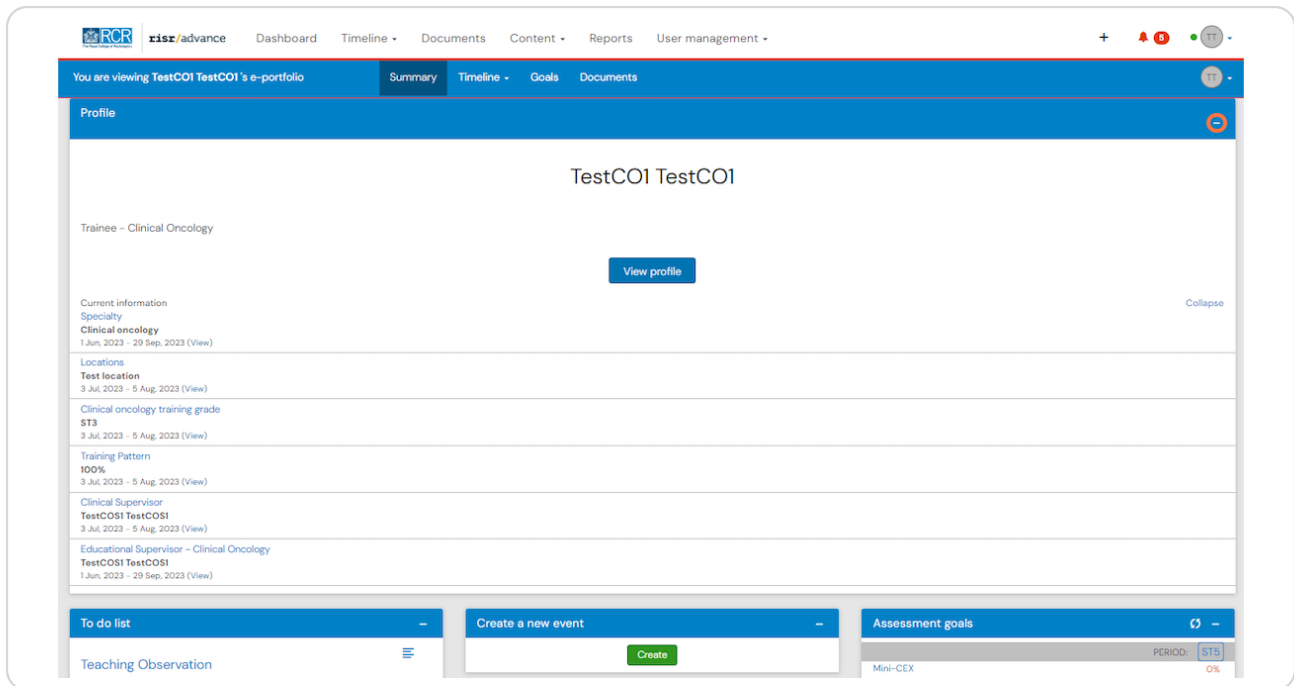# Clicking on a trainee's name will take you to their summary dashboard

STEP 5

The trainee summary dashboard provides an overview of key information

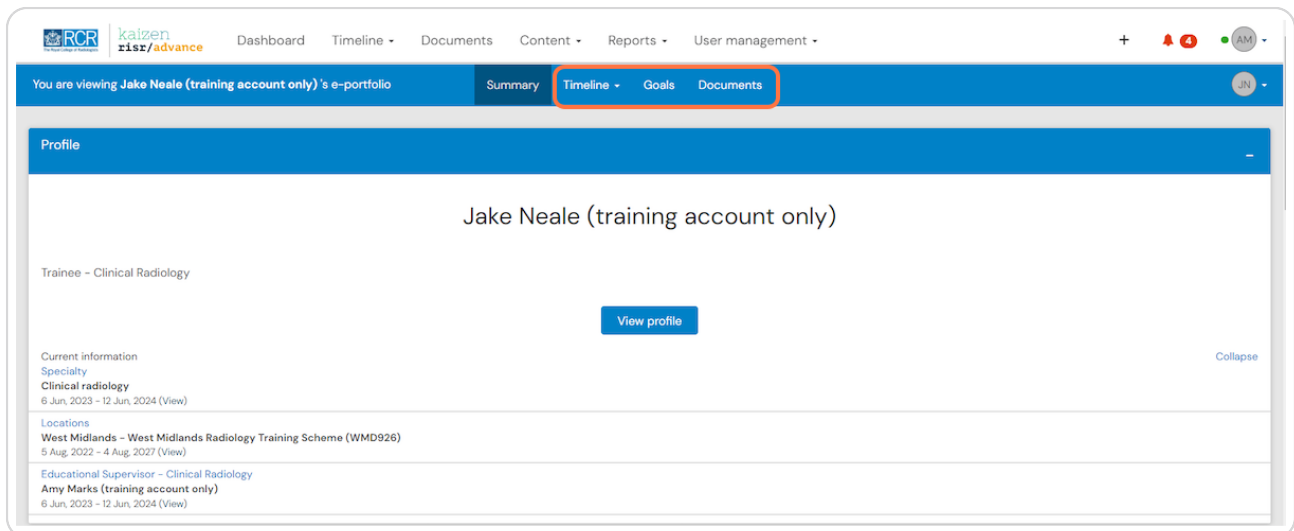The profile tile will show current information relating to their training

STEP 6

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

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

STEP 8

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

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

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.

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

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

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

STEP 14

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

STEP 15

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

The dots show the progress of these events

Completed events are shown with a green bar to the left

Clinical supervision report 🏷   ● ○ ○ ○ ○ ○ ○   CREATED ON: 14 JUL, 2023
Awaiting response from TestCOS1 TestCOS1

You are currently working on a response to this event. Click here to fill in

↺ Show audit log   ≡ Preview

Assign educational supervisor and specialty   ● CREATED ON: 14 JUL, 2023

↺ Show audit log   ≡ Preview

Assign training post, OOPA, or period of leave 🏷   ● CREATED ON: 14 JUL, 2023

↺ Show audit log   ≡ Preview

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