

# Completing clinical supervision reports

A guide for trainers

37 Steps

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Created by

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## STEP 1

### Select the Clinical supervision report from the to do list on your dashboard

You can also access your to do list by clicking the bell icon at the top right of the page

The screenshot shows the RCR e-portfolio dashboard. At the top, there is a navigation bar with the RCR logo, 'riscr/advance', and 'Dashboard'. Below this, there are tabs for 'Timeline', 'Documents', 'Content', 'Reports', and 'User management'. The main content area is titled 'Supervisor dashboard' and contains several sections:

- Profile**: A blue header bar with a plus icon.
- Inbox**: A section with a blue header bar. It contains a welcome message: 'Welcome to the RCR's e-portfolio test site. PUBLISHED ON: 14 JUL, 2023. Welcome to the RCR's e-portfolio test site. Thank you for taking part in this user testing session. The RCR is aiming to make more use of the inbox feature of..'. There is a 'Go to my inbox' button.
- Create a new event**: A section with a blue header bar. It contains the text 'First, select who you want to create this for:' and two buttons: 'MySelf' (green) and 'Someone else' (orange).
- E-portfolio support**: A section with a blue header bar. It contains text about user guides and FAQs, and a weekly e-portfolio clinic.
- My Trainees**: A section with a blue header bar. It contains a list of trainees: 'TestCO1 TestCO1' and 'TestCO3 TestCO3'. There is a 'View all Users' button.
- Become an examiner**: A section with a blue header bar. It contains text about advertising opportunities for doctors.
- To do list**: A section with a blue header bar. It contains a list of tasks: 'Teaching Observation for TestCO1 TestCO1', 'Educational supervision report for TestCO1 TestCO1', and 'Clinical supervision report for TestCO1 TestCO1'. The 'Clinical supervision report for TestCO1 TestCO1' is highlighted with a red box.

## STEP 2

### You can view the section completed by the trainee

All types of supervision report are created from the same form. The first field in the trainee section will identify the purpose of the supervision report.

The screenshot displays the RCR 'Clinical supervision report for TestCO1 TestCO1' form. The form is in a 'DRAFT' state and is 'PRIVATE'. It shows the date occurred on 14 Jul 2023 and the end date on 21 Jul 2023. The form is filled in by TestCO1 TestCO1 on 14 Jul 2023. The 'Please select the purpose of this supervision report' dropdown menu is highlighted with a red box, showing 'Clinical supervisor's induction report' as the selected option. The 'Training grade' is set to 'ST3'. The 'Clinical rotation goals report' section includes a 'Download PDF' button and a table with the following data:

Goal title	Goal due date	Goal state	Preview
Test	Jun 30, 2023	Open	Preview

### STEP 3

If any details are missing from the trainee's section or the report has been sent to you in error you can click on **Reject** to return the form to the trainee

You will be asked to provide an explanation for the trainee to view

RCR | **risz/advance** | Dashboard | Timeline ▾ | Documents | Content ▾ | Reports | User management ▾

## Clinical supervision report for TestCO1 TestCO1

[Fill in](#) [Reject](#) < Back

● ○ ○ ○ ○ ○ ○ ○ DRAFT PRIVATE Awaiting your action VERSION 7 [Show audit log](#)

Date occurred on 14 Jul, 2023 End date 21 Jul, 2023

TT Section filled in by TestCO1 TestCO1 FILLED IN ON 14 JUL, 2023

Training Pattern: 100%  
Clinical oncology training grade: ST3  
Specialty: Clinical oncology  
Locations: Test location

Please select the purpose of this supervision report

Clinical supervisor's induction report

### STEP 4

Click on **Fill in** to complete the supervisor's section of the form

RCR | **risz/advance** | Dashboard | Timeline ▾ | Documents | Content ▾ | Reports | User management ▾

## Clinical supervision report for TestCO1 TestCO1

[Fill in](#) [Reject](#) < Back

● ○ ○ ○ ○ ○ ○ ○ DRAFT PRIVATE Awaiting your action VERSION 7 [Show audit log](#)

Date occurred on 14 Jul, 2023 End date 21 Jul, 2023

TT Section filled in by TestCO1 TestCO1 FILLED IN ON 14 JUL, 2023

Training Pattern: 100%  
Clinical oncology training grade: ST3  
Specialty: Clinical oncology  
Locations: Test location

Please select the purpose of this supervision report

Clinical supervisor's induction report

Training grade

ST3

# # Editing trainee sections

2 Steps

## STEP 5

You can edit any of the details entered in the trainee section by clicking on **Edit**

You must click on Fill in for this option to become available

The screenshot shows the RCR risr/advance web interface. At the top, there is a navigation bar with the RCR logo, the text 'risr/advance', and menu items: 'Dashboard', 'Timeline', 'Documents', 'Content', 'Reports', and 'User management'. Below the navigation bar, the main content area displays a supervision report form. The form includes the following elements:

- A header bar with 'Date occurred on 17 Jul, 2023' and 'End date 17 Jul, 2023'.
- A section header 'Section filled in by TestCO1 TestCO1' with a 'FILLED IN ON 17 JUL, 2023' timestamp.
- A light blue box containing the following details:
  - Training Pattern: 100%
  - Clinical oncology training grade: ST3
  - Specialty: Clinical oncology
  - Locations: Test location
- A section titled 'Please select the purpose of this supervision report' with a dropdown menu showing 'Informal/interim meeting'.
- A section titled 'Training grade' with a dropdown menu showing 'ST3'.
- An 'Edit' button with a pencil icon.
- A 'Show less' link at the bottom of the form.

## STEP 6

Click Save to complete any edits you have made

11 Section filled in by TestCOI TestCOI FILLED IN ON 17 JUL, 2023

Training Pattern: 100%  
Clinical oncology training grade: ST3  
Specialty: Clinical oncology  
Locations: Test location

Please select the purpose of this supervision report \*

Informal/interim meeting ▼

Training grade \*

ST3 ▼

Purpose of informal meeting

List of those present, in addition to trainee and supervisor

Trainee comments

Please provide your comments on what has gone well during the period under review, areas for development, and any other relevant details.

Attach files

**Save** **Cancel**

# # Completing an induction report

3 Steps

## STEP 7

### Complete the required fields to summarise the discussion with the trainee at their induction meeting

Prompts below the text boxes provide further guidance

Summary of discussion with trainee

Supervisor's summary of discussion with trainee \*

comment

Please describe any support agreed to enable the trainee to achieve their goals

This might include courses; e-learning activity; targeted clinical experience

Attach files

Submit Save as draft

## STEP 8

You can attach any relevant documents to the report by clicking on **Attach files**

Summary of discussion with trainee

Supervisor's summary of discussion with trainee ★

comment

Please describe any support agreed to enable the trainee to achieve their goals

*This might include courses; e-learning activity; targeted clinical experience*

**Attach files**

**Submit** Save as draft

## STEP 9

To complete the report and publish it to the trainee's timeline click on **Submit**

You can click Save as draft if you wish to complete the form at a later date.

Summary of discussion with trainee

Supervisor's summary of discussion with trainee ★

comment

Please describe any support agreed to enable the trainee to achieve their goals

*This might include courses; e-learning activity; targeted clinical experience*

Attach files

**Submit** Save as draft



# # Completing a mid-point review

3 Steps

## STEP 10

### Complete the required fields to summarise the discussion with the trainee at their mid-point review

Prompts below the text boxes provide further guidance

Summary of discussion with trainee

Trainee successes during the period under review ★

Suggested areas for development and recommendations for the remainder of this post ★

Please describe any support agreed to enable the trainee to achieve their goals

*This might include courses; e-learning activity; targeted clinical experience*

Attach files

Submit Save as draft

## STEP 11

You can attach any relevant documents to the report by clicking on **Attach files**

Summary of discussion with trainee

Trainee successes during the period under review ★

Suggested areas for development and recommendations for the remainder of this post ★

Please describe any support agreed to enable the trainee to achieve their goals

This might include courses; e-learning activity; targeted clinical experience

[📎 Attach files](#)

[Submit](#) [Save as draft](#)

## STEP 12

To complete the report and publish it to the trainee's timeline click on **Submit**

You can click Save as draft if you wish to complete the form at a later date.

Summary of discussion with trainee

Trainee successes during the period under review ★

Suggested areas for development and recommendations for the remainder of this post ★

Please describe any support agreed to enable the trainee to achieve their goals

This might include courses; e-learning activity; targeted clinical experience

[Attach files](#)

**Submit** [Save as draft](#)

## STEP 13

### Complete the required fields to summarise the discussion with the trainee at the meeting

Prompts below the text boxes provide further guidance

Summary of discussion with trainee

Supervisor's summary of discussion with trainee \*

Please describe any support agreed to enable the trainee to achieve their goals

This might include courses; e-learning activity; targeted clinical experience

Attach files

Submit Save as draft

## STEP 14

You can attach any relevant documents to the report by clicking on **Attach files**

Summary of discussion with trainee

Supervisor's summary of discussion with trainee ★

Please describe any support agreed to enable the trainee to achieve their goals

This might include courses; e-learning activity; targeted clinical experience

## STEP 15

To complete the report and publish it to the trainee's timeline click on **Submit**

You can click Save as draft if you wish to complete the form at a later date.

Summary of discussion with trainee

Supervisor's summary of discussion with trainee ★

Please describe any support agreed to enable the trainee to achieve their goals

This might include courses; e-learning activity; targeted clinical experience

## STEP 16

Complete the required fields to summarise the discussion with the trainee at their end of post review

The screenshot shows the 'risr/advance' interface with a navigation menu at the top containing 'Dashboard', 'Timeline', 'Documents', 'Content', 'Reports', and 'User management'. The main content area is titled 'Supervisor feedback' and contains four sections:

- Trainee successes in this post \***: A large text input field, highlighted with a red border.
- Suggested areas for development and recommendations for future training \***: A large text input field, highlighted with a red border.
- Compliments/commendations**: A dropdown menu with the question 'To your knowledge, has the trainee received any compliments/commendations? \*'.
- Concerns/investigations**: A dropdown menu with the question 'Has the trainee been involved in any conduct, capability, or serious untoward incidents/significant event investigation, or named in any complaint? \*'.

## STEP 17

If you select Yes under compliments/commendations or concerns/investigations further boxes will appear so that you can provide more detail

**Compliments/commendations**

To your knowledge, has the trainee received any compliments/commendations? \*

Yes

If yes, please provide further detail \*

**Concerns/investigations**

Has the trainee been involved in any conduct, capability, or serious untoward incidents/significant event investigation, or named in any complaint? \*

Yes

If yes, have these been resolved satisfactorily with no remaining concerns about the trainee's fitness to practice or conduct? \*

Irrespective of outcome, has the trainee reflected on the incident? \*

Further comments on the incident \*

## STEP 18

Select the appropriate entrustment level for each of the CiPs from the drop down list

You will only need to comment on specialty specific CiPs

**Overall progress**

Please indicate the overall level achieved by the trainee in each of the CiPs/procedures/milestones listed below. You do not need to provide a level for the generic CiPs (1-6), and these are not included below.

The minimum level that trainees are expected to reach for each stage of training can be found on the ARCP decision aids for [CR](#) and [IR](#).

**Progress towards achieving the specialty-specific CiPs:**

CiP 7 - Appropriately select and tailor imaging to patient context and the clinical question(s). \*

Level 2 - Entrusted to act with direct supervision

Please select the entrustment level the trainee has achieved for this CiP

CiP 8 - Provide timely, accurate and clinically useful reports on imaging studies. \*

Please select the entrustment level the trainee has achieved for this CiP

CiP 9 - Appropriately manage imaging examination lists/procedures according to clinical need and professional expertise. \*

Please select the entrustment level the trainee has achieved for this CiP

CiP 10 - Evaluate image quality and utilise the knowledge of imaging sciences to optimise image quality. \*

Please select the entrustment level the trainee has achieved for this CiP

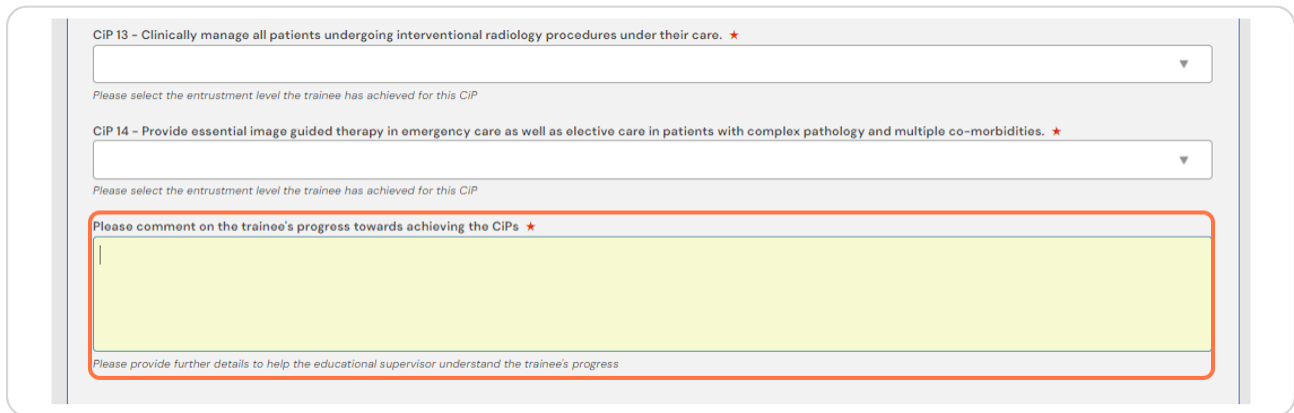
CiP 11 - Safely manage the imaging and image-guided intervention needed to support emergency care. \*

Please select the entrustment level the trainee has achieved for this CiP

## STEP 19

### You will be asked to add some commentary on the trainee's progress towards achieving the CiPs

These comments are incredibly useful for the educational supervisor and ARCP panel. The more detail you can provide the easier it will be for them to understand the trainee's progress across rotations and make an overall judgement at ARCP.



The screenshot shows a web form interface. At the top, there is a dropdown menu for 'CIP 13 - Clinically manage all patients undergoing interventional radiology procedures under their care. ★'. Below it is a smaller dropdown menu with the instruction 'Please select the entrustment level the trainee has achieved for this CiP'. This is followed by another dropdown menu for 'CIP 14 - Provide essential image guided therapy in emergency care as well as elective care in patients with complex pathology and multiple co-morbidities. ★', also with a smaller dropdown menu and the same instruction. The main part of the form is a large yellow text area with a red border, containing the instruction 'Please comment on the trainee's progress towards achieving the CiPs ★'. Below this text area is a smaller instruction: 'Please provide further details to help the educational supervisor understand the trainee's progress'.

## STEP 20

### Clinical oncology supervisors: For trainees at ST3 you will only be asked to give entrustment levels for the shared oncology CiPs since the clinical oncology-specific CiPs are not formally assessed until ST4

Selecting Yes when asked if the trainee is ST4+ will enable you to assign entrustment levels for the clinical oncology-specific CiPs.



## STEP 21

### Clinical radiology supervisors: Select any procedures or milestones that the trainee has covered in this rotation from the drop down list

You will only be asked to assign entrustment levels for those procedures or milestones you select. If a trainee did not have experience of a procedure during this rotation do not select it from the list

The screenshot shows a web form titled "Progress towards CR procedures/milestones:". Below the title is a question: "Which procedures/milestones did the trainee address in this post? ★". There are two text input fields. The top field contains the text "Image guided vascular access and basic catheter/wire manipulation ✕". The bottom field contains "Image guided vascular access and basic catheter/wire manipulation ★". Between these fields is a scrollable list of procedures and milestones. The first item, "Image guided biopsy", is highlighted with a blue bar. Other items include "Image guided drainage", "Contrast studies of lines and tubes", "Contrast studies of the adult and paediatric GI and GU tract", "Protocol and prioritise imaging referrals", "Independently report plain films to support the acute unselected intake", and "Manage an ultrasound list to support the acute unselected intake". At the bottom of the form, there is a small instruction: "Please select the entrustment level the trainee has achieved for this milestone/procedure".

## STEP 22

### For IR trainees there will be an additional drop down list for procedures covered by the IR curriculum

You will only be asked to assign entrustment levels for those procedures you select. If a trainee did not have experience of a procedure during this rotation do not select it from the list

The screenshot shows a web form titled "Progress towards IR procedures/milestones:". Below the title is a question: "Which IR procedures/milestones did the trainee address in this attachment? ★". There is a text input field containing the text "Which IR procedures/milestones did the trainee address in this attachment?". Below this is another question: "Please comment on the trainee's progress towards achieving the required level in IR procedures". This is followed by a large, empty text area for comments. At the bottom of the form, there is a question: "Do you have any concerns about the trainee's progress? ★" and a dropdown menu.

## STEP 23

### You will be asked to add some commentary on the trainee's progress towards the procedures and milestones

These comments are incredibly useful for the educational supervisor and ARCP panel. The more detail you can provide the easier it will be for them to understand the trainee's progress across rotations and make an overall judgement at ARCP.

Report MRI examinations to support the acute unselected intake \*

Please select the entrustment level the trainee has achieved for this milestone/procedure

Please comment on the trainee's progress towards achieving the CR milestones and procedures

Progress towards IR procedures/milestones:

Which IR procedures/milestones did the trainee address in this attachment? \*

Which IR procedures/milestones did the trainee address in this attachment?

Please comment on the trainee's progress towards achieving the required level in IR procedures

Do you have any concerns about the trainee's progress? \*

Note: these concerns may be external factors (e.g. training missed due to COVID-19) and do not necessarily imply any fault on the part of the trainee.

## STEP 24

### Please state whether you have any concerns about the trainee's progress

If you select Yes, a box will appear for further comments. These comments are incredibly useful for the educational supervisor and ARCP panel. The more detail you can provide the easier it will be for them to understand the trainee's progress across rotations and make an overall judgement at ARCP. It is essential that any concerns are documented.

Do you have any concerns about the trainee's progress? \*

Yes

Note: these concerns may be external factors (e.g. training missed due to COVID-19) and do not necessarily imply any fault on the part of the trainee.

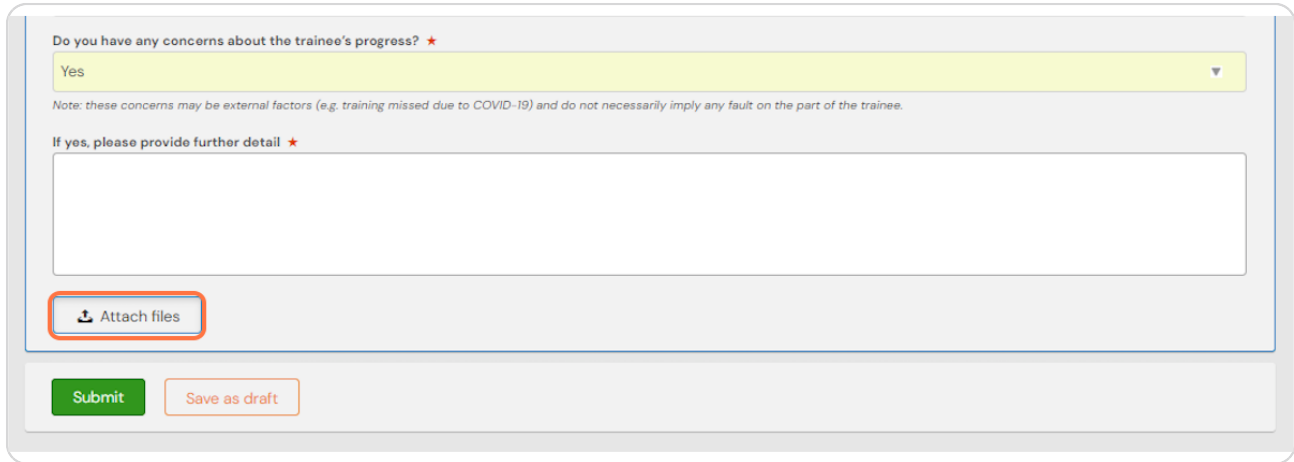
If yes, please provide further detail \*

Attach files

Submit Save as draft

## STEP 25

You can attach any relevant documents to the report by clicking on **Attach files**



Do you have any concerns about the trainee's progress? \*

Yes

Note: these concerns may be external factors (e.g. training missed due to COVID-19) and do not necessarily imply any fault on the part of the trainee.

If yes, please provide further detail \*

**Attach files**

**Submit** Save as draft

## STEP 26

To complete the report and publish it to the trainee's timeline click on **Submit**

You can click Save as draft if you wish to complete the form at a later date.



Do you have any concerns about the trainee's progress? \*

Yes

Note: these concerns may be external factors (e.g. training missed due to COVID-19) and do not necessarily imply any fault on the part of the trainee.

If yes, please provide further detail \*

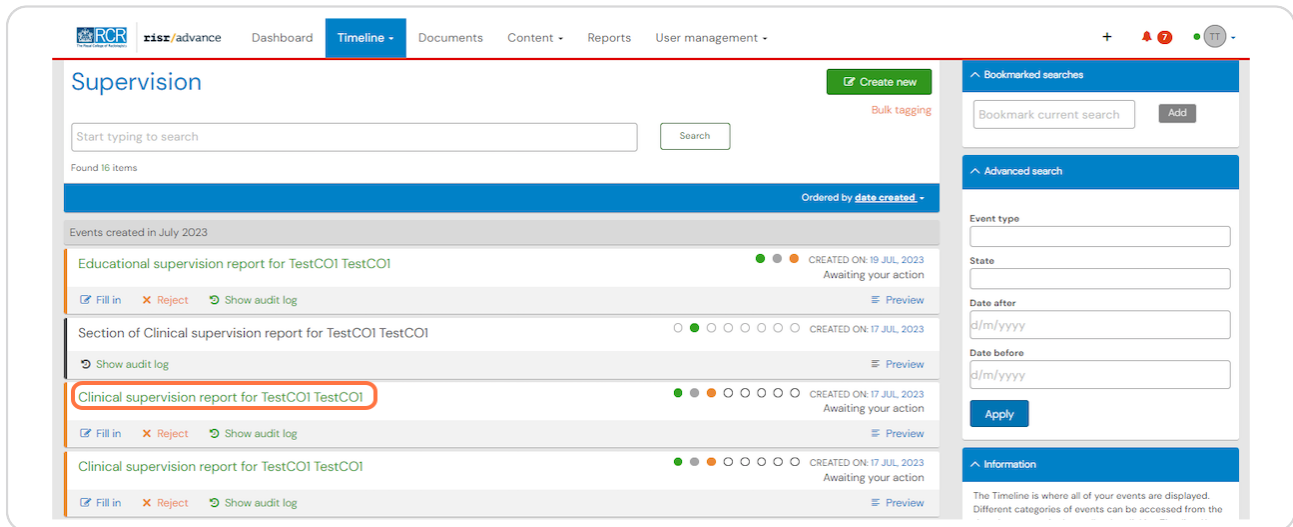
Attach files

**Submit** Save as draft

## STEP 27

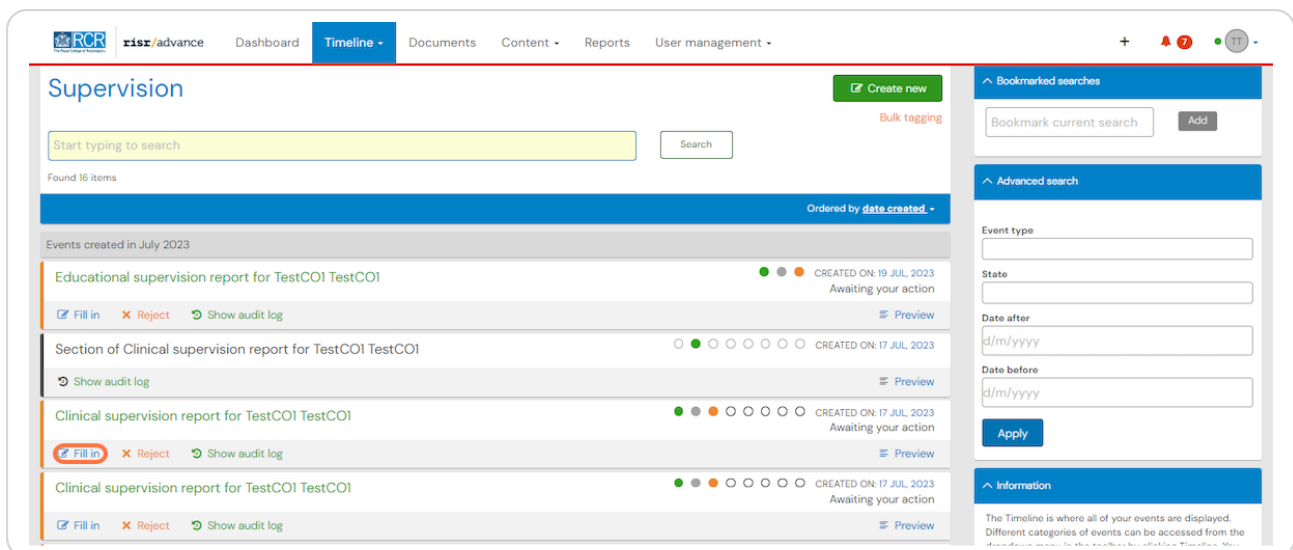
### Locate the draft report in your timeline

Drafts are shown with an orange bar on the left. You can use the search box at the top of the page or the advanced search to the right of the screen to help you find the report. You can also find the draft report in your to do list.



## STEP 28

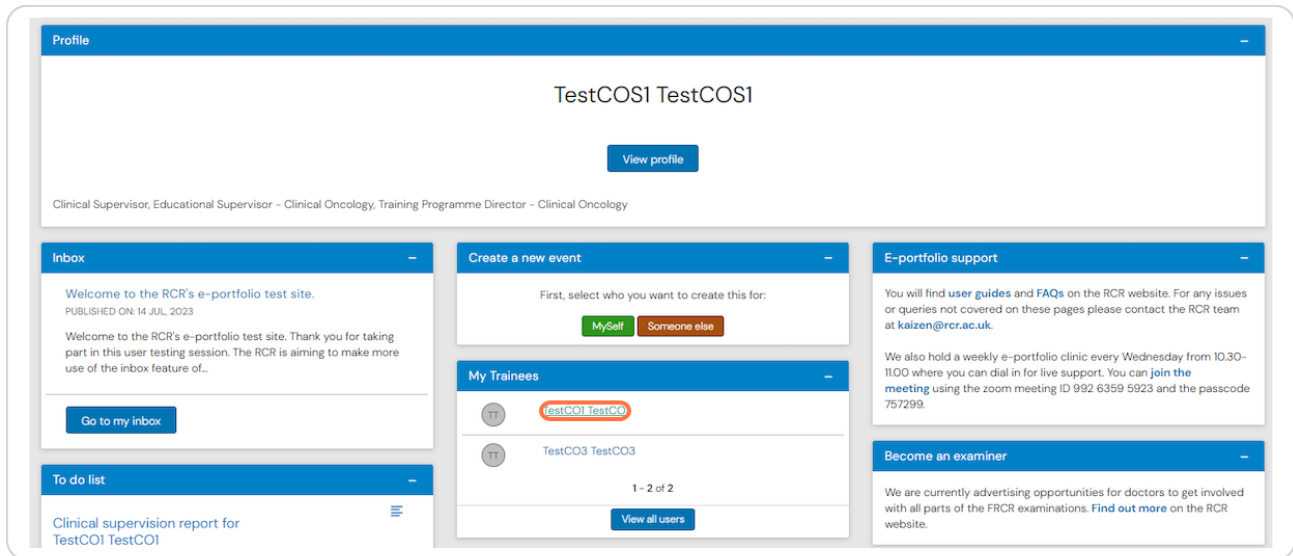
### Click on Fill in to continue working on the report



## STEP 29

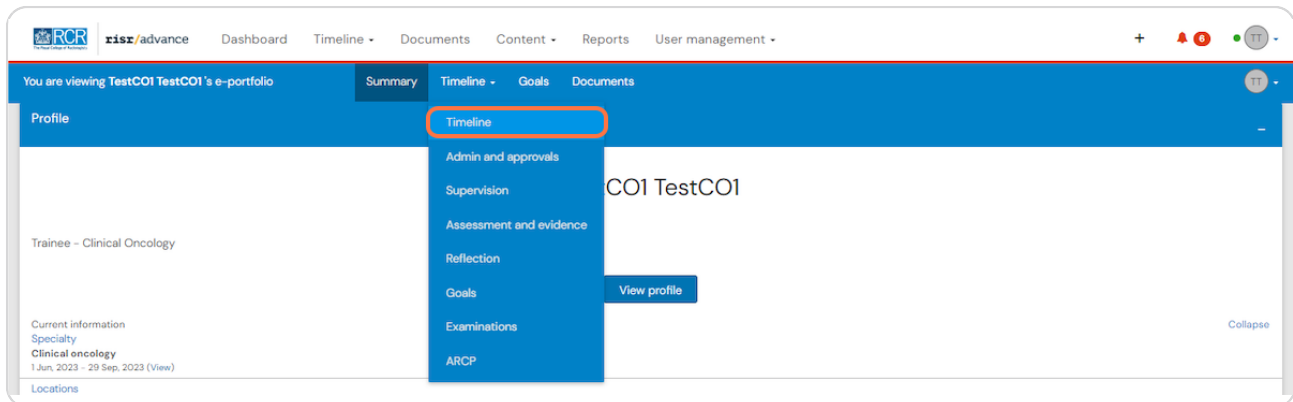
From your dashboard, select the trainee required

This will take you to the trainee's summary dashboard



## STEP 30

Click on Timeline on the trainee's summary dashboard



## STEP 31

### Select the required report from the trainee's timeline

You can use the search box at the top of the page or the advanced search to the right of the screen to help you find the report

The screenshot shows the RCR e-portfolio interface. At the top, there is a navigation bar with the RCR logo and 'risr/advance'. Below this is a breadcrumb trail: 'You are viewing TestCOI TestCOI's e-portfolio'. The main content area is titled 'TestCOI TestCOI's Timeline' and includes a search bar with the text 'Start typing to search' and a 'Search' button. A green '+ Create new' button is also visible. Below the search bar, it says 'Found 25 items'. The events are ordered by 'date created'. A section titled 'Your to do list for this user' shows '1 events' and lists 'CO Educational Supervisor's Structured Report' with a 'CREATED ON: 17 JUL, 2023' status. Below this, a section titled 'Events created in July 2023' shows two 'Clinical supervision report' events. The first event is highlighted with a red box and has a status of 'CREATED ON: 17 JUL, 2023'. The second event is also 'CREATED ON: 17 JUL, 2023' and has a status of 'Awaiting response from TestCOSI TestCOSI'. A 'Show audit log' link and a 'Preview' button are also visible. On the right side, there is an 'Advanced search' sidebar with fields for 'Event type', 'State', 'Date after', and 'Date before', and an 'Apply' button.

## STEP 32

### Scroll to the section of the report that you completed and click on Edit

The screenshot shows a detailed view of a report section. At the top, it says 'Section filled in by TestCOSI TestCOSI' and 'FILLED IN ON 17 JUL, 2023'. Below this is a light blue box containing the following information: 'Role: Clinical Supervisor', 'Specialty: Clinical oncology', and 'Locations: Test location'. Underneath is a section titled 'Summary of discussion with trainee'. Below that is another section titled 'Supervisor's summary of discussion with trainee' which contains a text input field with the word 'comment' and an 'Edit' button. At the bottom of the section, there is a 'Show less ^' link.

## STEP 33

You will be able to edit your comments and attach files

TT Section filled in by TestCOSI TestCOSI FILLED IN ON 17 JUL, 2023

---

Role: Clinical Supervisor  
Specialty: Clinical oncology  
Locations: Test location

**Summary of discussion with trainee**

Supervisor's summary of discussion with trainee ★

comment

Please describe any support agreed to enable the trainee to achieve their goals

This might include courses; e-learning activity; targeted clinical experience

Attach files

Save

Cancel

## STEP 34

Click on Save to publish the edited report to the trainee's timeline

TT Section filled in by TestCOSI TestCOSI FILLED IN ON 17 JUL, 2023

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Role: Clinical Supervisor  
Specialty: Clinical oncology  
Locations: Test location

**Summary of discussion with trainee**

Supervisor's summary of discussion with trainee ★

comment

Please describe any support agreed to enable the trainee to achieve their goals

This might include courses; e-learning activity; targeted clinical experience

Attach files

Save

Cancel

Show less ^

## STEP 35

### There is an option for the trainee to open up the supervisor's section of any report form

This is useful if you are completing the form during your meeting and don't want to log in to your e-portfolio account separately.

## STEP 36

### To use this option, the trainee should move the toggle under Fill in on the same device

This will open the supervisor's section. Once the supervisor's section has been submitted, you will receive an email to view the section and confirm that you are happy with the information in the form before the report is completed.

The next section of this form can be filled in by users with these roles: RCR College Controller, Clinical Supervisor

Who would you like to fill in the next section of this form? ★

Start typing to search

You can only invite users with a risr/advance account to fill in the next section. After typing at least 3 characters, we will suggest matches from known users in risr/advance. You may enter a user's name or email address

**Fill in on the same device**

No  Yes

Summary of discussion with trainee

Supervisor's summary of discussion with trainee ★

## STEP 37

### Another way to use this feature is to ask the trainee to summarise the discussion that took place after your review meeting

This can be a good way of checking that they understand the feedback provided. You will be able to edit any of the information they enter in the supervisor section of the form.



