

# Pre-populating an ARCP form in advance

A guide for ARCP panel members and administrators

23 Steps

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## STEP 1

### Log into your e-portfolio account

## STEP 2

### Select the trainee being reviewed

This will take you to the trainee's summary dashboard

The screenshot shows the RCR e-portfolio dashboard for Simon Tam (training account only). The dashboard includes a profile card with the name 'Simon Tam (training account only)' and a 'View profile' button. Below the profile card, there is a section for 'Current information' and 'Locations', listing 'Eavesdown Radiology (training account only)' with dates '1 Sep, 2018 - 31 Dec, 2030 (View)'. To the right, there are several panels: 'Create a new event' with a 'MySelf' button and a 'Someone else' button; 'My Connections' with a list of users including 'Jake Neale (training account only)' (highlighted with a red box) and 'Zoe Washburne (training account only)'; 'Support & Guides' with contact information for Kaizen; 'Deletion of Events or Assessments' with a warning about confirmation; and 'ARCP form completion and where to find form after successful sign off/submission' with a link to complete the form.

## STEP 3

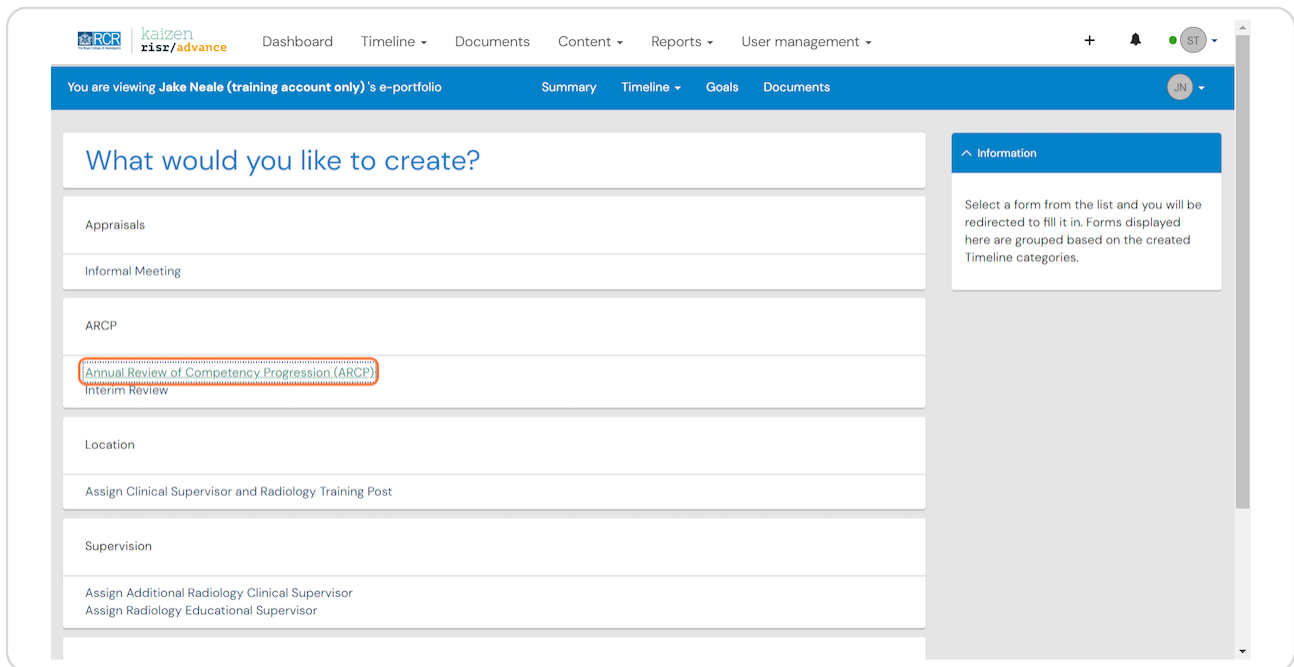
### From the trainee's summary dashboard, click on "Create"

The screenshot shows the RCR e-portfolio summary dashboard for Jake Neale (training account only). The dashboard includes a profile card with the name 'Jake Neale (training account only)' and a 'View profile' button. Below the profile card, there is a section for 'RCR Exams' with a link to 'We are pleased to announce the autumn schedules for clinical radiology and clinical oncology examinations, which include details of the exam dates, eligibility and relevant FAQs.' To the right, there are several panels: 'Create a new event' with a 'Create' button (highlighted with a red box); 'WPBA Count' with a table showing counts for different assessment types and dates; and a 'Profile' section with a 'View profile' button.

Count	Assessment type	Date	Preview
	Grand total		

## STEP 4

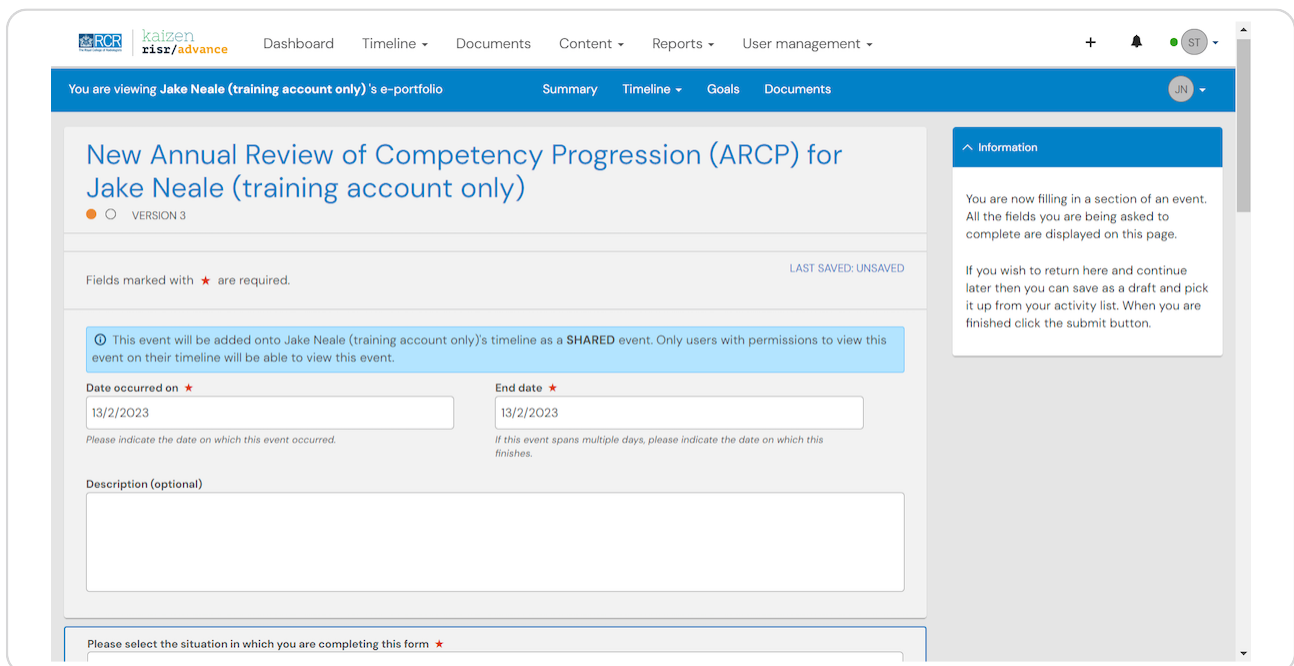
### Click on "Annual Review of Competency Progression (ARCP)"



The screenshot shows the RCR e-portfolio interface. At the top, there is a navigation bar with the RCR logo, 'kaizen risz/advance', and menu items: Dashboard, Timeline, Documents, Content, Reports, and User management. Below this is a sub-header: 'You are viewing Jake Neale (training account only) 's e-portfolio' with sub-menus: Summary, Timeline, Goals, and Documents. The main content area is titled 'What would you like to create?' and contains several categories: Appraisals, Informal Meeting, ARCP, Location, and Supervision. Under the ARCP category, 'Annual Review of Competency Progression (ARCP)' is highlighted with a red box. To the right, an 'Information' box explains that forms are grouped by timeline categories.

## STEP 5

### The ARCP form will open



The screenshot shows the RCR e-portfolio interface with the ARCP form open. The title is 'New Annual Review of Competency Progression (ARCP) for Jake Neale (training account only)'. Below the title, there is a 'VERSION 3' indicator. A note states: 'This event will be added onto Jake Neale (training account only)'s timeline as a SHARED event. Only users with permissions to view this event on their timeline will be able to view this event.' The form includes fields for 'Date occurred on' (13/2/2023) and 'End date' (13/2/2023), both marked with a red star indicating they are required. A 'Description (optional)' field is also present. At the bottom, there is a prompt: 'Please select the situation in which you are completing this form'. To the right, an 'Information' box explains that all fields are required and that users can save as a draft.

## STEP 6

Select "Pre-populating in advance of the ARCP" from the dropdown menu labelled "Please select the situation in which you are completing this form"

The screenshot displays the RCR e-portfolio interface for a user named Jake Neale. The top navigation bar includes the RCR logo, the text "kaizen risz/advance", and menu items for Dashboard, Timeline, Documents, Content, Reports, and User management. Below this, a blue header bar shows "You are viewing Jake Neale (training account only)'s e-portfolio" and sub-menus for Summary, Timeline, Goals, and Documents. The main content area features a dropdown menu with the label "Please select the situation in which you are completing this form" and the selected option "Pre-populating in advance of the ARCP". Below this, there are sections for "Training programme and panel information" (including a "Deanery" dropdown), "List of all ARCP panel members" (an empty table), and "Trainee details" (including a "GMC Number" field). There are also two checkboxes for "Is there an external adviser present for this review?" and "Is there a lay adviser present for this review?".

## STEP 7

### Select your deanery from the dropdown menu

If your deanery is not listed, please select other and type your deanery in the text box that appears. Please also contact [kazien@rcr.ac.uk](mailto:kazien@rcr.ac.uk) to let us know your deanery is missing from the list.

The screenshot shows the RCR e-portfolio interface for a user named Jake Neale. The top navigation bar includes the RCR logo, 'kaizen risz/advance', and menu items: Dashboard, Timeline, Documents, Content, Reports, and User management. The user's profile 'Jake Neale (training account only)' is visible, along with a user menu icon 'JN'. The main content area is titled 'Training programme and panel information' and contains several form fields:

- A dropdown menu for 'Please select the situation in which you are completing this form' with the selected option 'Pre-populating in advance of the ARCP'.
- A dropdown menu for 'Deanery' which is highlighted with a red border. Below it is the instruction 'Please select your deanery/local office'.
- A section for 'List of all ARCP panel members' with an empty table.
- A dropdown menu for 'Is there an external adviser present for this review?'.
- A dropdown menu for 'Is there a lay adviser present for this review?'.
- A section for 'Trainee details' with a field for 'GMC Number'.

## STEP 8

### Select your GMC training programme approval number from the dropdown menu

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 'You are viewing Jake Neale (training account only)'s e-portfolio' with sub-tabs for 'Summary', 'Timeline', 'Goals', and 'Documents'. The form contains several sections: 'Please select the situation in which you are completing this form' with a dropdown set to 'Pre-populating in advance of the ARCP'; 'Training programme and panel information' with a 'Deanery' dropdown set to 'South West'; 'GMC training programme approval number' dropdown, which is highlighted with an orange border; 'List of all ARCP panel members' text area; and two checkboxes for 'Is there an external adviser present for this review?' and 'Is there a lay adviser present for this review?'.

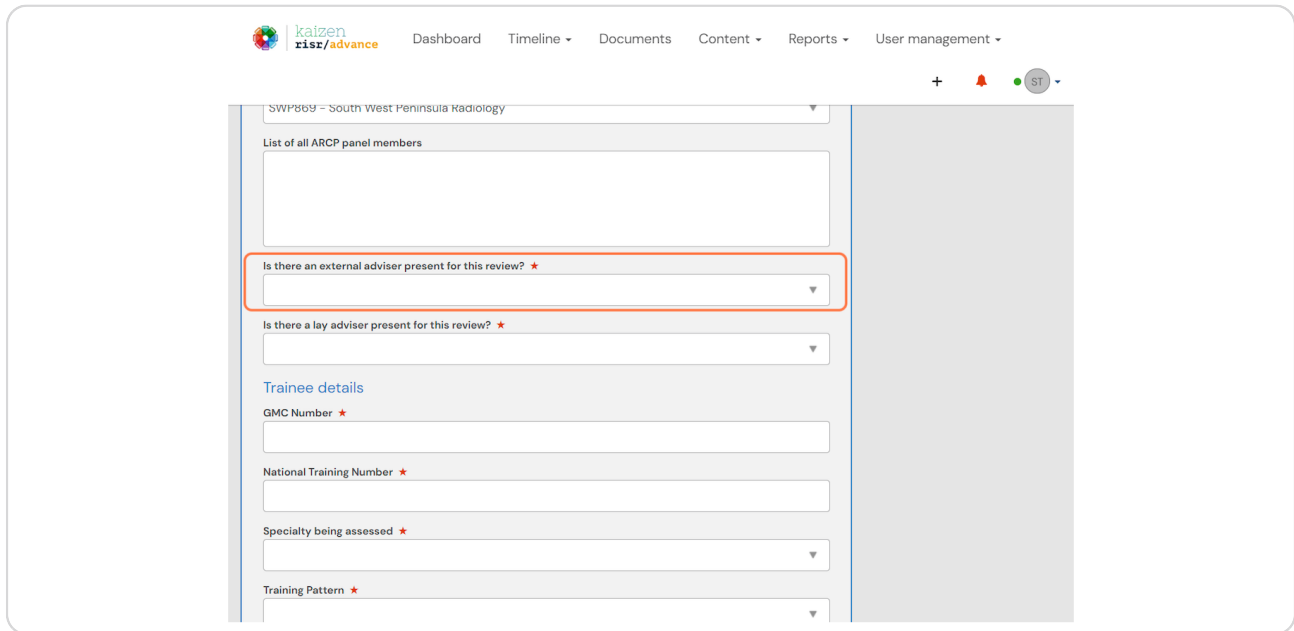
## STEP 9

### Type a list of panel members and their roles in the text box

This screenshot is identical to the one in Step 8, but the 'GMC training programme approval number' dropdown is now set to 'SWP869 - South West Peninsula Radiology'. The 'List of all ARCP panel members' text area is highlighted with an orange border, indicating where the user should enter the names and roles of the panel members.

## STEP 10

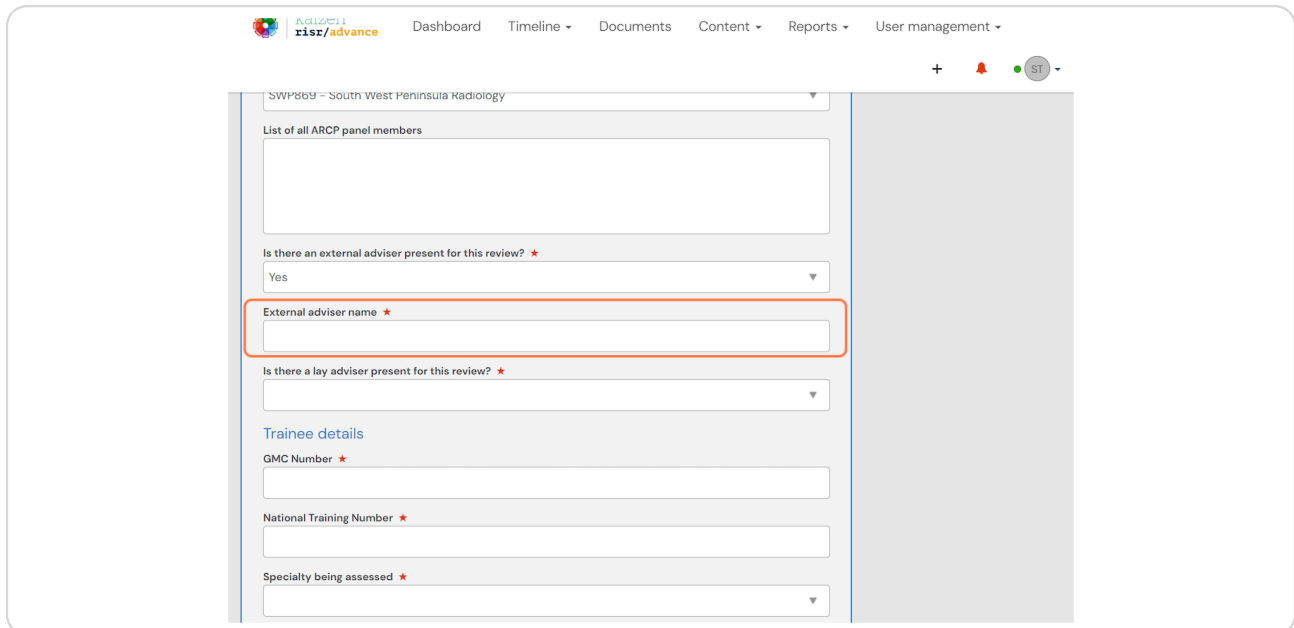
Use the dropdown menu to indicate whether an external adviser was present for this review



The screenshot shows the RISR/advance interface. At the top, there is a navigation bar with the logo and menu items: Dashboard, Timeline, Documents, Content, Reports, and User management. Below the navigation bar, there is a dropdown menu for 'SWP889 - South West Peninsula Radiology'. The main content area is divided into two columns. The left column contains a 'List of all ARCP panel members' section, followed by a dropdown menu for 'Is there an external adviser present for this review?'. This dropdown menu is highlighted with a red box. Below it is another dropdown menu for 'Is there a lay adviser present for this review?'. The right column is currently empty. Below the dropdown menus, there is a section titled 'Trainee details' with several input fields: 'GMC Number', 'National Training Number', 'Specialty being assessed', and 'Training Pattern'.

## STEP 11

If you select "Yes" a text box will appear where you can record the external adviser's name



The screenshot shows the RISR/advance interface. At the top, there is a navigation bar with the logo and menu items: Dashboard, Timeline, Documents, Content, Reports, and User management. Below the navigation bar, there is a dropdown menu for 'SWP889 - South West Peninsula Radiology'. The main content area is divided into two columns. The left column contains a 'List of all ARCP panel members' section, followed by a dropdown menu for 'Is there an external adviser present for this review?'. This dropdown menu is set to 'Yes' and is highlighted with a red box. Below it is a text input field for 'External adviser name', which is also highlighted with a red box. Below the text input field is another dropdown menu for 'Is there a lay adviser present for this review?'. The right column is currently empty. Below the dropdown menus, there is a section titled 'Trainee details' with several input fields: 'GMC Number', 'National Training Number', 'Specialty being assessed', and 'Training Pattern'.

## STEP 12

Use the dropdown menu to indicate whether a lay adviser was present for this review

The screenshot shows the 'risz/advance' web application interface. At the top, there is a navigation bar with links for 'Dashboard', 'Timeline', 'Documents', 'Content', 'Reports', and 'User management'. Below the navigation bar, there is a dropdown menu for 'South West Peninsula Radiology'. The main content area is divided into two columns. The left column contains a 'List of all ARCP panel members' section with an empty table. Below this is a form with the following fields: 'Is there an external adviser present for this review?' (dropdown menu with 'Yes' selected), 'External adviser name' (text input field with 'name' entered), and 'Is there a lay adviser present for this review?' (dropdown menu, highlighted with a red box). Below these fields is a 'Trainee details' section with three text input fields: 'GMC Number', 'National Training Number', and 'Specialty being assessed'.

## STEP 13

If you select "Yes" a text box will appear where you can record the lay adviser's name

The screenshot shows the 'risz/advance' web application interface, similar to the previous one. The 'Is there a lay adviser present for this review?' dropdown menu is now set to 'Yes', and a text input field labeled 'Lay adviser name' has appeared below it, highlighted with a red box. The other fields in the form remain the same as in the previous screenshot.



## STEP 14

### Complete the remaining trainee details

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 user's name 'JN' is visible in the top right. The main content area is titled 'You are viewing Jake Neale (training account only)'s e-portfolio' and contains the following fields:

- Is there a lay adviser present for this review?
- Trainee details**
- GMC Number
- National Training Number
- Specialty being assessed
- Training Pattern
- Additional grade assessed information
- Period covered by this review**
- Date from
- Date to

## STEP 15

### Ensure that you select the correct specialty from the "specialty being assessed" dropdown menu

This will determine the options available in later dropdown menus

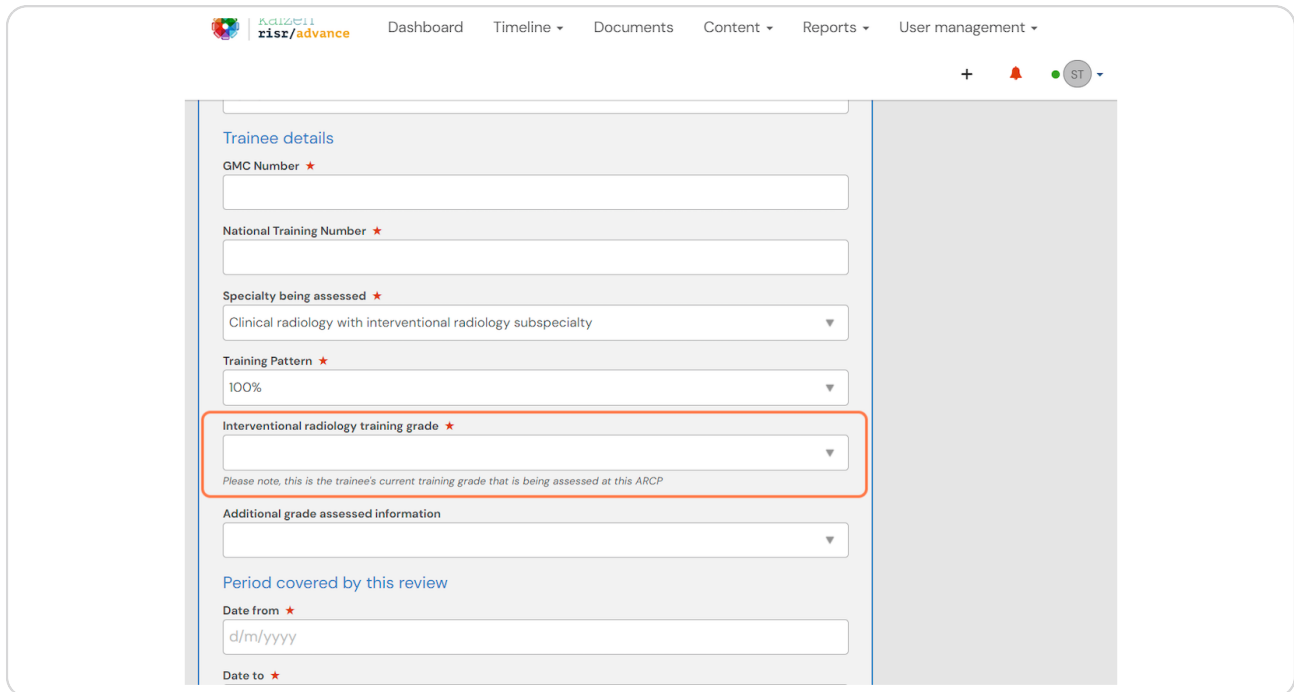
This close-up screenshot shows the 'Specialty being assessed' dropdown menu. The menu is open, displaying a list of specialties. The option 'Clinical radiology with interventional radiology subspecialty' is highlighted in grey, indicating it is the selected specialty.

- Clinical oncology
- Clinical radiology
- Clinical radiology with interventional radiology subspecialty
- Nuclear medicine with CESR in clinical radiology
- Nuclear medicine with dual CCT in clinical radiology
- DMF Radiology
- Other

## STEP 16

### Once a specialty has been selected, a dropdown menu will appear to record the trainee's grade

You should record the trainee's training grade for the period under review (normally their current training grade)



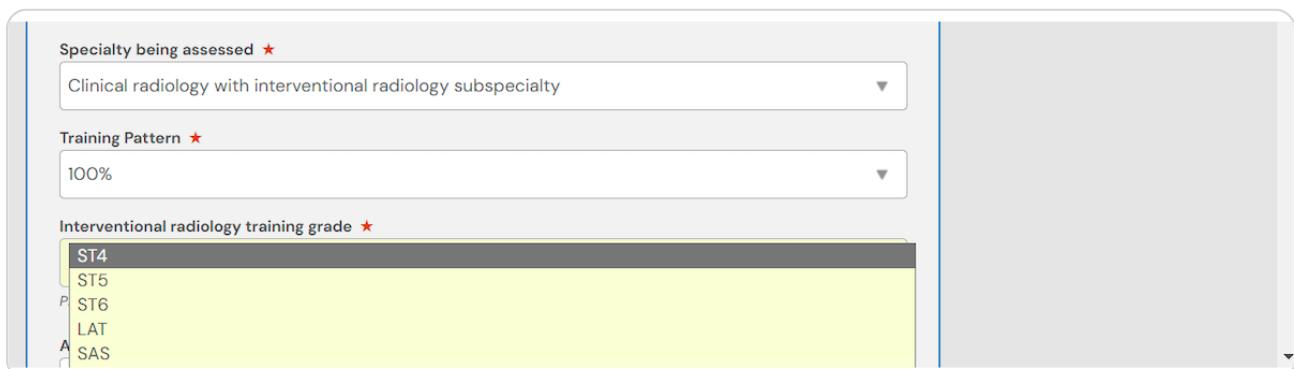
The screenshot shows the 'Trainee details' form in the RCR/risr/advance system. The form includes the following fields:

- GMC Number \*
- National Training Number \*
- Specialty being assessed \*: Clinical radiology with interventional radiology subspecialty
- Training Pattern \*: 100%
- Interventional radiology training grade \* (highlighted with a red box)
- Additional grade assessed information
- Period covered by this review
  - Date from \*: d/m/yyyy
  - Date to \*

A note below the training grade dropdown states: "Please note, this is the trainee's current training grade that is being assessed at this ARCP".

## STEP 17

### Only training grade options relevant to the specialty/combination of specialties selected will appear.



The screenshot shows the 'Interventional radiology training grade' dropdown menu with the following options:

- ST4
- ST5
- ST6
- LAT
- SAS

## STEP 18

### Enter the date range under review

You can type the dates or use the date picker that appears when you click in the date box

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 'You are viewing Jake Neale (training account only) 's e-portfolio' with sub-tabs for 'Summary', 'Timeline', 'Goals', and 'Documents'. The 'Interventional radiology training grade' is set to 'ST4'. Below this, there is a section titled 'Period covered by this review' which is highlighted with a red box. This section contains fields for 'Date from' and 'Date to', both with a date format of 'd/m/yyyy'. Other fields include 'Number of days of time out of training since last review / commencing programme' and 'Months counted towards training'. At the bottom of this section, there is a link for 'Approved clinical training gained during the period to be reviewed' and a section for 'All Training Post Collection' with a 'Review period from' field set to '1/9/2017'.

## STEP 19

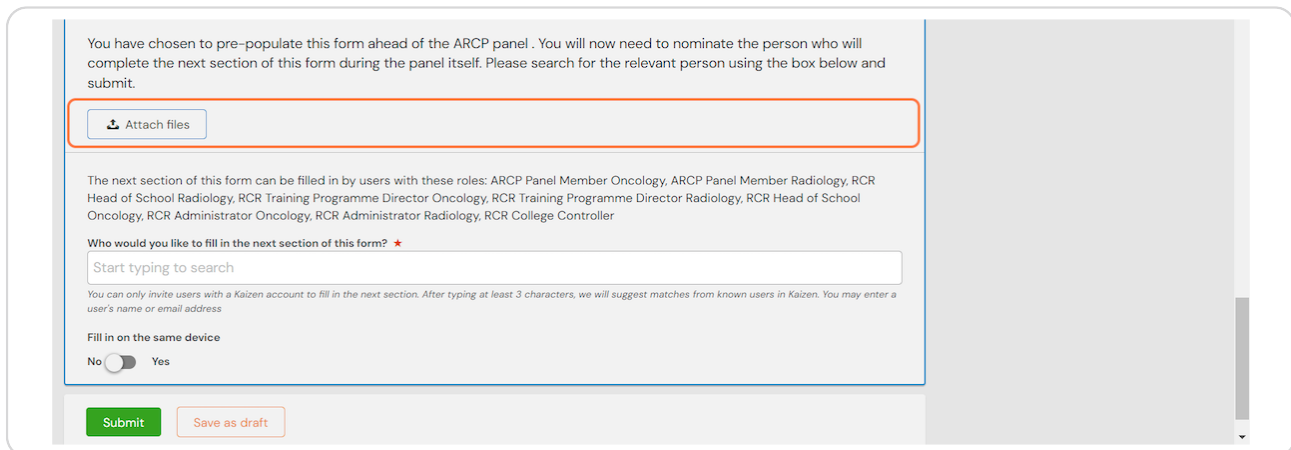
To create a summary of the trainee's clinical attachments, select the required date range and click on "Generate report"

The screenshot shows the RCR e-portfolio interface for Jake Neale, focusing on the 'Generate report' step. The top navigation bar and main header are the same as in the previous screenshot. The 'Date to' field is now the primary focus, with a date format of 'd/m/yyyy'. Below it are fields for 'Number of days of time out of training since last review / commencing programme' and 'Months counted towards training'. The 'Approved clinical training gained during the period to be reviewed' section is visible, with 'All Training Post Collection' and 'Review period from' set to '13/2/2022'. The 'Review period to' field is set to '13/2/2023'. At the bottom of this section, there is a link for 'Reset to default values' and a prominent 'Generate report' button highlighted with a red box.

## STEP 20

### You can attach any relevant documents to the form by clicking on "Attach files"

Files must be saved on your device in order to be uploaded



You have chosen to pre-populate this form ahead of the ARCP panel . You will now need to nominate the person who will complete the next section of this form during the panel itself. Please search for the relevant person using the box below and submit.

[Attach files](#)

The next section of this form can be filled in by users with these roles: ARCP Panel Member Oncology, ARCP Panel Member Radiology, RCR Head of School Radiology, RCR Training Programme Director Oncology, RCR Training Programme Director Radiology, RCR Head of School Oncology, RCR Administrator Oncology, RCR Administrator Radiology, RCR College Controller

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

Start typing to search

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

Fill in on the same device

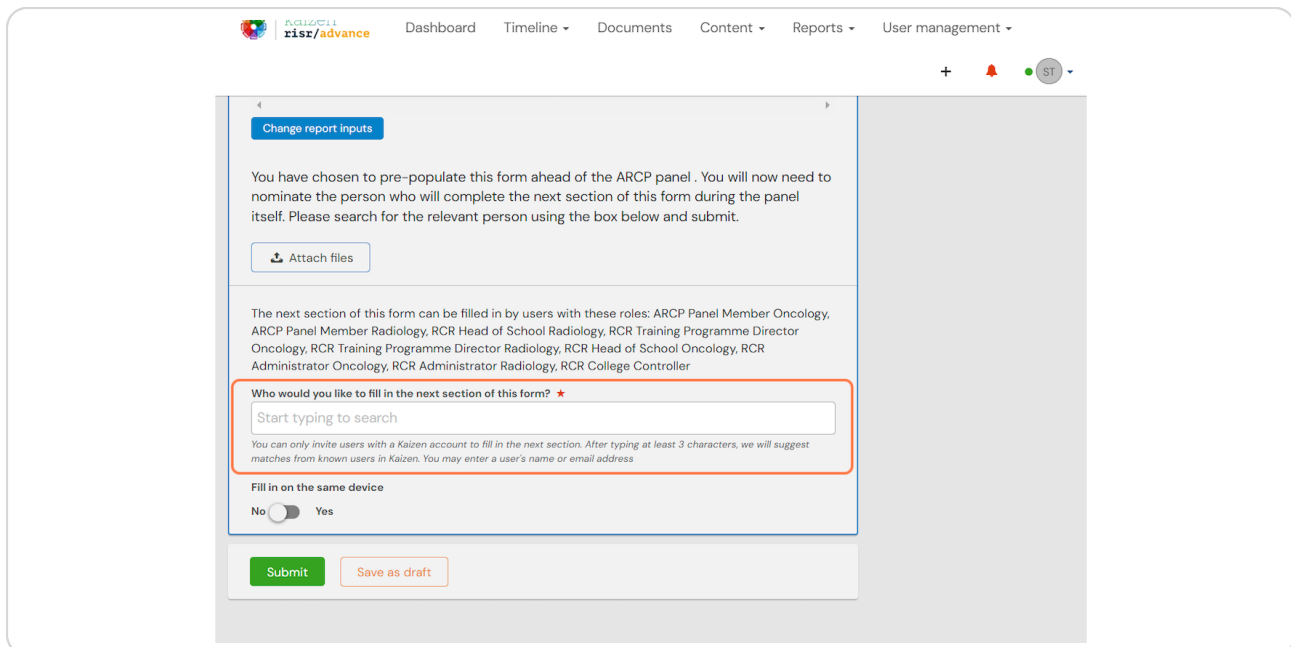
No  Yes

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

## STEP 21

### If someone else will complete the form during the ARCP, you should type their name in the search box

The e-portfolio will automatically search for them. Only users with an e-portfolio account and the required permissions will be able to complete the next section of the ARCP form



risr/advance Dashboard Timeline Documents Content Reports User management

Change report inputs

You have chosen to pre-populate this form ahead of the ARCP panel . You will now need to nominate the person who will complete the next section of this form during the panel itself. Please search for the relevant person using the box below and submit.

[Attach files](#)

The next section of this form can be filled in by users with these roles: ARCP Panel Member Oncology, ARCP Panel Member Radiology, RCR Head of School Radiology, RCR Training Programme Director Oncology, RCR Training Programme Director Radiology, RCR Head of School Oncology, RCR Administrator Oncology, RCR Administrator Radiology, RCR College Controller

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

Start typing to search

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

Fill in on the same device

No  Yes

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

## STEP 22

### Click submit to send the form to the person who will complete it during the ARCP

The next section of this form can be filled in by users with these roles: ARCP Panel Member Oncology, ARCP Panel Member Radiology, RCR Head of School Radiology, RCR Training Programme Director Oncology, RCR Training Programme Director Radiology, RCR Head of School Oncology, RCR Administrator Oncology, RCR Administrator Radiology, RCR College Controller

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

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

Fill in on the same device

No  Yes

## STEP 23

### If you will be completing the form during the ARCP, you can skip steps 21 and 22 and click "Save as draft" instead

The next section of this form can be filled in by users with these roles: ARCP Panel Member Oncology, ARCP Panel Member Radiology, RCR Head of School Radiology, RCR Training Programme Director Oncology, RCR Training Programme Director Radiology, RCR Head of School Oncology, RCR Administrator Oncology, RCR Administrator Radiology, RCR College Controller

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

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

Fill in on the same device

No  Yes



The Royal College of Radiologists