

**Guide to the New Educational
Supervisors Report (ESR)
in the ePortfolio**

**RCGP Workplace Based Assessment (WPBA)
Standards Group**

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What's the thinking behind the new Educational Supervisors Report (ESR)?

The ESR has been significantly revised following feedback from trainees, trainers, educational supervisors and secondary care clinical supervisors. The main purpose of these revisions is to improve the quality of the information available and the "flow" of the assessment and feedback process. As a result, supervisors should be better able to make their global judgements and give formative feedback for the Personal Development Plan (PDP).

The idea behind the report is to encourage trainees to think more about the evidence that they submit and encourage a greater understanding of the competence framework. It will also encourage educational supervisors to look for specific evidence on which to base their judgement for each of the domains and then provide specific recommendations for the trainee, to encourage progression before the next review.

There have been several key changes:

- **"Needs Further Development" has been expanded** into three descriptors
 - below expectations (for the stage of training)
 - meet expectations
 - above expectations

Both trainees and trainers have expressed concern that for the majority of the time in training, the trainee can only be assessed as "Needs Further Development" because reaching the 'competent for licensing' standard can only occur in the final year of training for most of the competence framework.

This greatly limits the opportunity to give formative feedback. The expansion of the NFD grade means that there is greater scope to identify learning needs within this grade, and identify areas where a trainee may be performing well, even though they are not yet competent for licensing.

- The **Mandatory tools have more specific links** to the Competence Framework. This means that when viewing the summary table of progression towards competence, the column "Form contributions" will be more accurately populated, allowing the ES to make a better judgement of activity in each of the 12 domains
- **When reviewing the "Curriculum" and "Skills Log" the comments on coverage and recommendation will be found on the same page.** Open questions have been used to help both the trainee and ES gain a better insight into progression. This will also help the flow of the report.
- The **Skills Log has been redesigned** in a number of ways.
 - The Foundation DOPS have been removed. These will now appear under the "Other Skills Submitted" section.
 - A Satisfactory DOPS column is now present. 'DOPS present' shows how many have been completed. 'Satisfactory DOPS' shows those that have been submitted with an overall rating of at least "Borderline for Completion".
 - The Trainee Ratings are sectioned off to make it clear this is Trainee Input.
- **A new section of the Review looks specifically at the PDP** and asks the ES to make comments on the PDP. Items entered within the last year are displayed here

- **In both the trainee’s “Self Assessment of Competence” and the ES assessment**, there have been changes made to the input forms. Both are asked to provide **evidence for each domain and actions to help with progression** before the next review. Encouraging the trainee to reflect and provide evidence to present for assessment will make it much easier for the ES to review, and give insight into the trainee’s ability to reflect on their learning and understanding of the framework itself.
- By encouraging both the trainee and supervisor to **cite the evidence** there should be improvements with formative development of the learner and help with the assessment decision of the ES. The process should be more focussed and the recommendations made should be in a ‘SMART’ format.

Summary word pictures have been developed for each of the domains, outlining what would be expected from a competent trainee. These have been made prominent, so that it is easier for assessors to understand each domain and the standard that they are rating against; this will be an important method for improving consistency. The detailed word pictures remain at the bottom of the page, to be used as needed for example when producing targeted feedback.

- The **trainee will now be able to view their activity within the 12 domains** in summary form, in the same way that the ES has been able to, giving them greater insight into activity in each area and identifying specific areas of need
- The **12 domains have been “Clustered”** into 4 areas
 - Relationship
 - Diagnostics
 - Management
 - Professionalism

This model was originally introduced into the ePortfolio in the new Clinical Supervisors Report (CSR) and is based on work done by Tim Norfolk and colleagues. This model is particularly useful from a “diagnostic” perspective to help identify areas of underperformance, and illustrate the link between the 12 domains

- A **new summary page on the ES report** will display:
 - curriculum coverage comments
 - skills log comments
 - quality of evidence presented
 - review of PDP

A summary of the comments from the trainee self rating for each of the competency domains will be visible on this page

A summary of the review process:

1. Create a review

This needs to be done in advance of the review, for three reasons:

- So that the Trainee's evidence appears in the correct Review period
- For an Educational Supervisor to release the PSQ and MSF results to the Trainee, they need to have the current review set. The system will not allow these to be released if this is not currently set.
- Under the new system, in order to make the Trainee "Self Rating" Review specific, a Review needs to exist to give the trainee this option.

2. View and comment on Curriculum Coverage

3. View and comment on Skills Log

4. Review and comment on the PDP

5. Review the Trainee's Self Assessment of Competence

6. Review each of the 12 areas of Competence

Make an "evidence-based" judgement about the progress of the trainee in each of the twelve areas, looking at evidence from the linked forms and learning log entries. In each section (domain) you are required to:

- Decide on a rating
- Give evidence to support this rating
- Decide on specific actions to help with progression before the next review

The trainee is required to go through the same process in their "self assessment" of competence

You will not be able to continue to the next stage of the review process until all sections have been completed

7. Finish Review

Review the summary of all comments and actions

- **Comment on the quality of the evidence provided**
- **Make a Recommendation**
- **Agree a Learning Plan**

The review details can then be edited, saved and edited later, or the review can be completed and submitted.