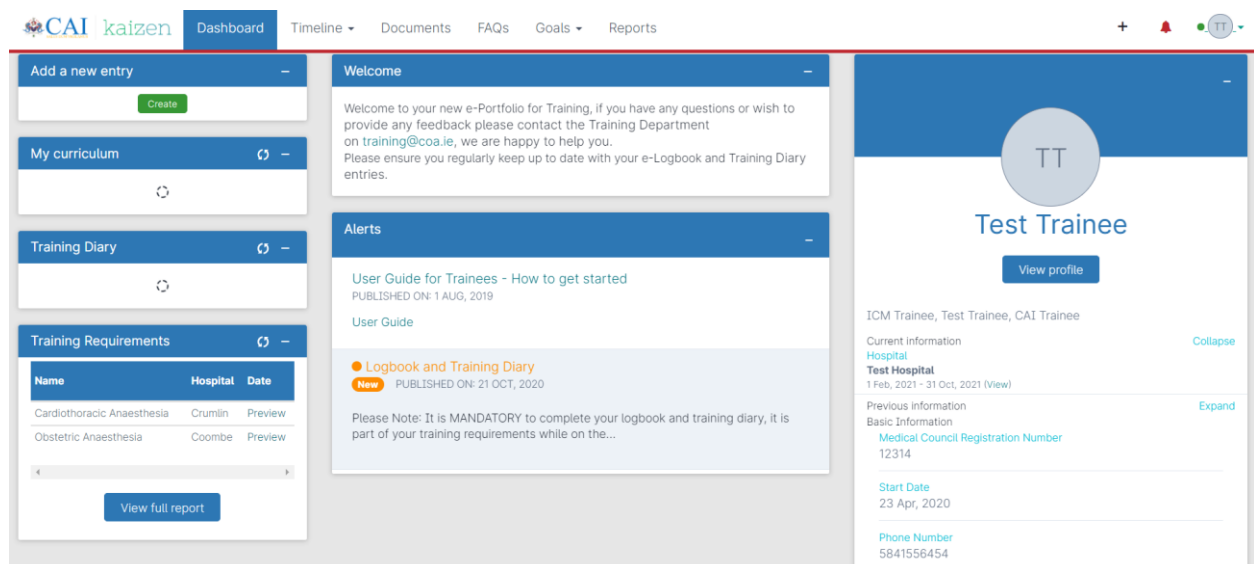


Trainee User Guide – e-Portfolio for Training July 2022

HOW TO GET STARTED:

Step 1 – Go to [Kaizen https://kaizenep.com](https://kaizenep.com) Click on College of Anaesthesiologists of Ireland and then add your **User Name**: “your College ID number” and **Password**: you will create it once you receive an email from Kaizen.

Step 2 – Individual Trainee Dashboard which outlines your training profile, where you can add an entry to your logbook and training diary and most of all keep track of your training progression. It also is where you can see any alerts or special notifications regarding your e-Portfolio and your training programme.



Name	Hospital	Date
Cardiothoracic Anaesthesia	Crumlin	Preview
Obstetric Anaesthesia	Coombe	Preview

View full report

TOP BAR EXPLAINED:

Dashboard: This is your main page and provides you with an individual dashboard.

Timeline: This gives you 3 options to choose from, see below. In this section you can view all of your submitted logbook and training diary entries, view if they are submitted (colour Green) or in draft (colour Orange). You can amend and update your entries in this section. This is explained in more detail below. Options:

1. All (full outline of all your logbook and training diary entries)
2. Logbook entries (just an outline of your logbook entries)
3. Training Diary entries (just an outline of your training diary entries)

Documents: In this section, you can upload any documents that you wish to store in your e-Portfolio for Training. E.g., certificate of attendance.

FAQs: To help get you started and for any questions you might have on your new e-Portfolio. This section will be added to as we receive feedback from trainees on the new system.

Goals: As you submit your logbook entries this screen will populate with your progress in each of the curriculum sections.

Reports: In this section, you can run an overall report for both your logbook entries and training diary. We hope to expand this section in time.

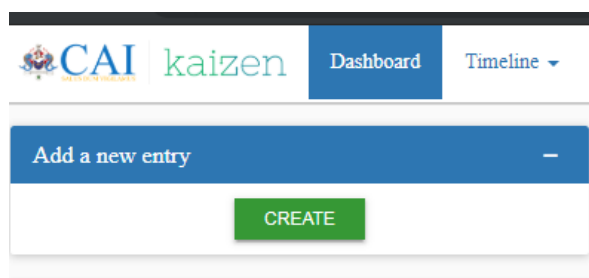
+ Symbol: Shortcut to accessing your logbook and training diary.

Red bell symbol: Shortcut to all of your draft entries.

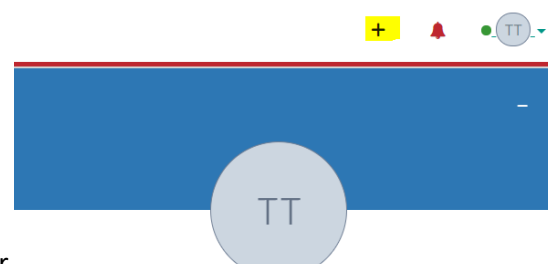
HOW TO ADD AN ENTRY:

Click "Create" on your dashboard or + in the top right of your dashboard this will bring you to several options:

1. Anaesthetic Logbook Entry/ICM Logbook Entry/Pain Logbook Entry
2. Training Diary Entry
3. Documents
4. Personal Information
5. Trainee Leave



or



What would you like to create?

Logbook entries

Anaesthetic Logbook Entry
 ICM Logbook Entry
 Pain Medicine Logbook Entry

Training diary entries

Training Diary Entry

Training Other

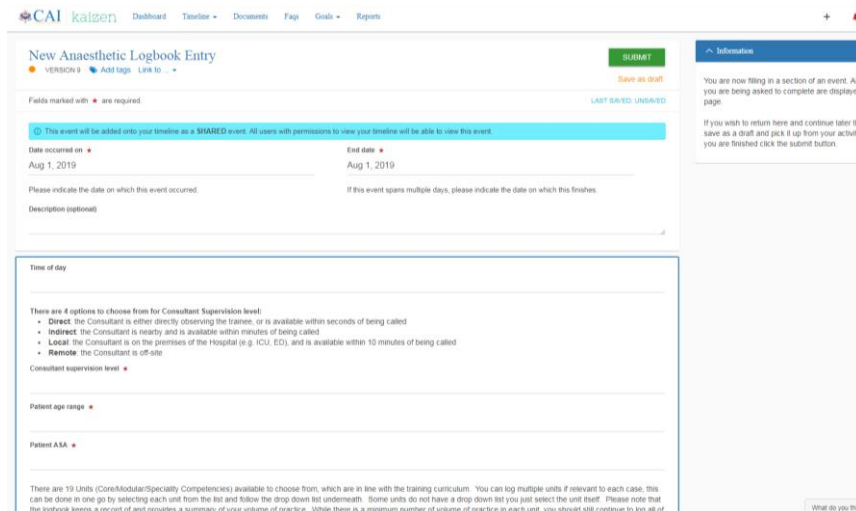
Document
 Personal Information
 Trainee Leave
 Work Based Assessment

1. Logbook – Click “Anaesthetic, ICM or Pain Logbook Entry” to add your cases.

This is where you fill in each section of the form, paying particular attention to all of the mandatory fields. Once you have completed the form you can click "Submit" or "Save as Draft".

Please note: there are a number of features on this page that are part of the system but have no relevance for the SAT programme.

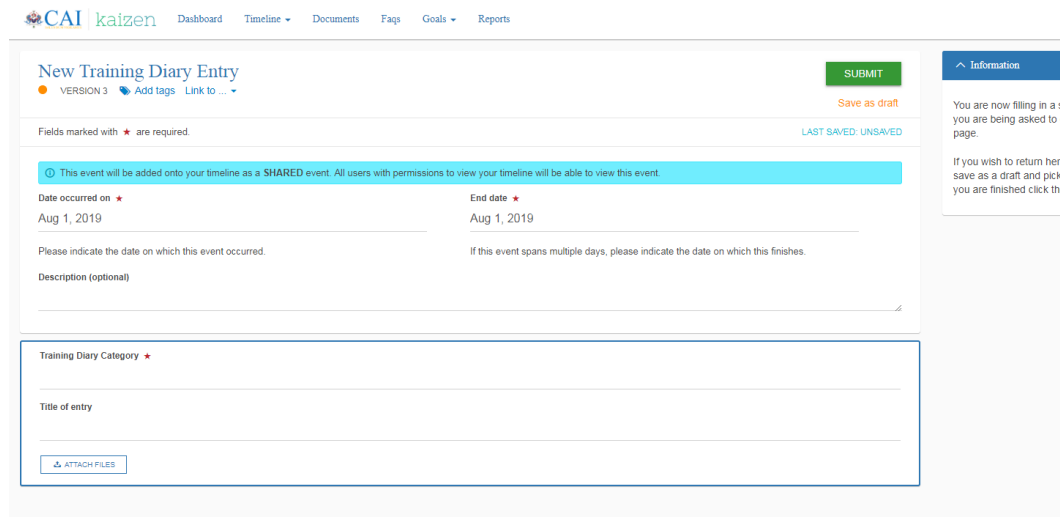
- **End Date:** This field does not need to be completed
- **Add Tag:** Will be phased out
- **Links:** Not currently live



The screenshot shows the 'New Anaesthetic Logbook Entry' form. At the top, there are navigation links for 'Dashboard', 'Timeline', 'Documents', 'Faq', 'Guids', and 'Reports'. The form title is 'New Anaesthetic Logbook Entry' with a 'SUBMIT' button and a 'Save as draft' link. Below the title, there are fields for 'Date occurred on' (set to Aug 1, 2019) and 'End date' (set to Aug 1, 2019). A note indicates that the event will be added to the user's timeline as a 'SHARED' event. The 'Description (optional)' field is present. The 'Time of day' section includes a dropdown for 'Consultant supervision level' with four options: Direct, Indirect, Local, and Remote. Below this are fields for 'Patient age range' and 'Patient ASA'. At the bottom, there is a note about selecting units from a list and a 'What do you think?' link.

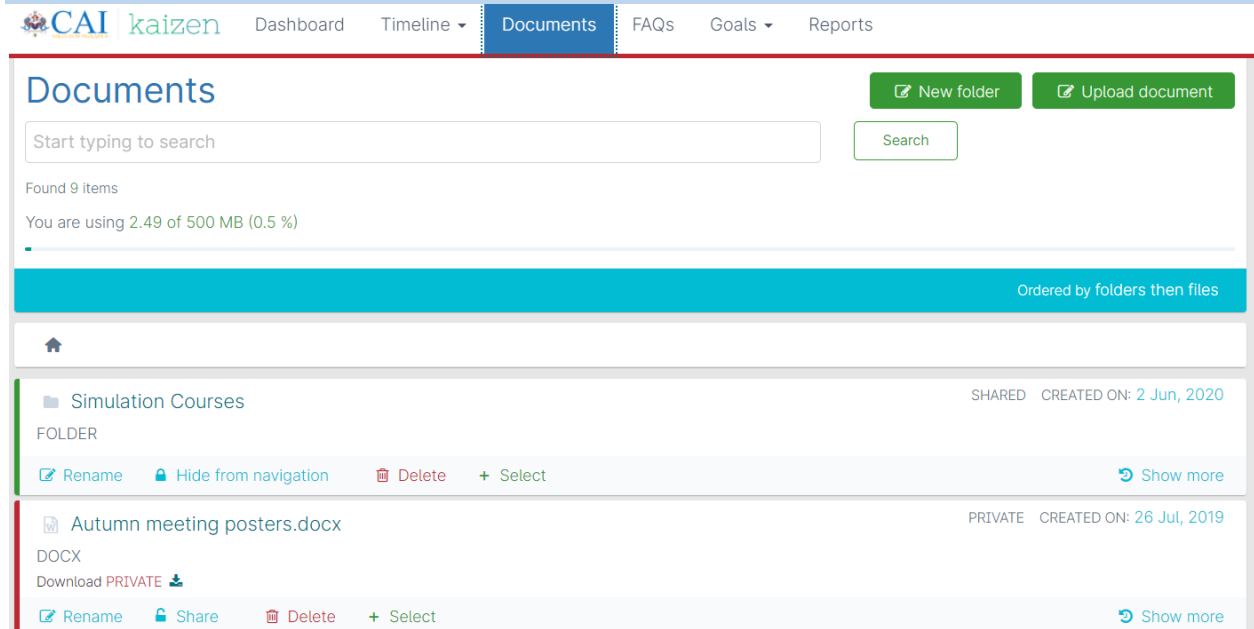
2. Training Diary – Click “Training Diary” to add educational activities such as personal learning, internal and external learning events, and research activities to your e-Portfolio for training and you can upload any certificates of attendance or relevant documents to your entry.

Please note that you are also required to record your additional protected training time and there is a place on this form for you to do this. Click “Training Diary Category” and choose “Additional Protected Training Time”.



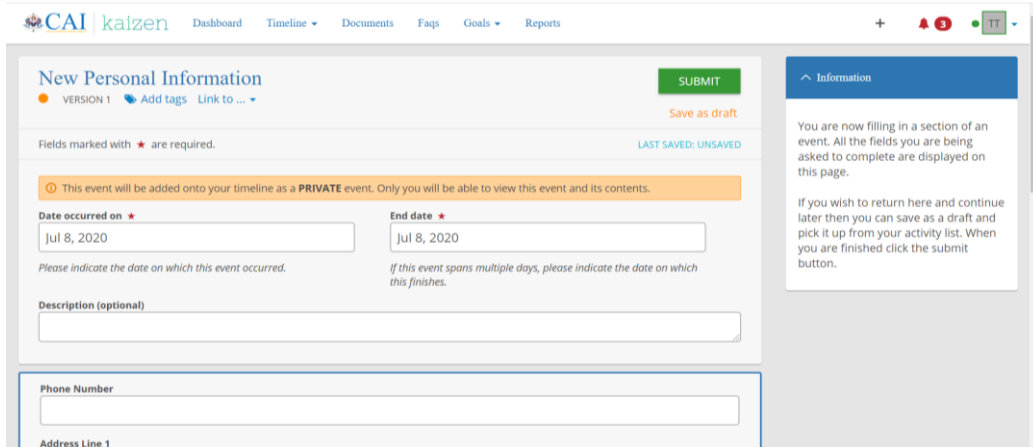
The screenshot shows the 'New Training Diary Entry' form. At the top, there is a navigation bar with 'CAI kaizen', 'Dashboard', 'Timeline', 'Documents', 'FAQs', 'Goals', and 'Reports'. The form title is 'New Training Diary Entry' with a 'SUBMIT' button and a 'Save as draft' link. A note states: 'Fields marked with * are required. LAST SAVED: UNSAVED'. A blue banner indicates: 'This event will be added onto your timeline as a SHARED event. All users with permissions to view your timeline will be able to view this event.' The form includes fields for 'Date occurred on' (Aug 1, 2019) and 'End date' (Aug 1, 2019). There are also fields for 'Description (optional)' and 'Training Diary Category'. At the bottom, there is a 'Title of entry' field and an 'ATTACH FILES' button. An 'Information' sidebar on the right provides instructions: 'You are now filling in a section you are being asked to complete. If you wish to return here save as a draft and pick it up when you are finished click the Save as draft button.'

3. Documents – Click “documents” to add any documents you wish to keep in your e-Portfolio. To create a folder, click on “New Folder”. If you then wish to add to this folder make sure you click into the folder before you select upload document.



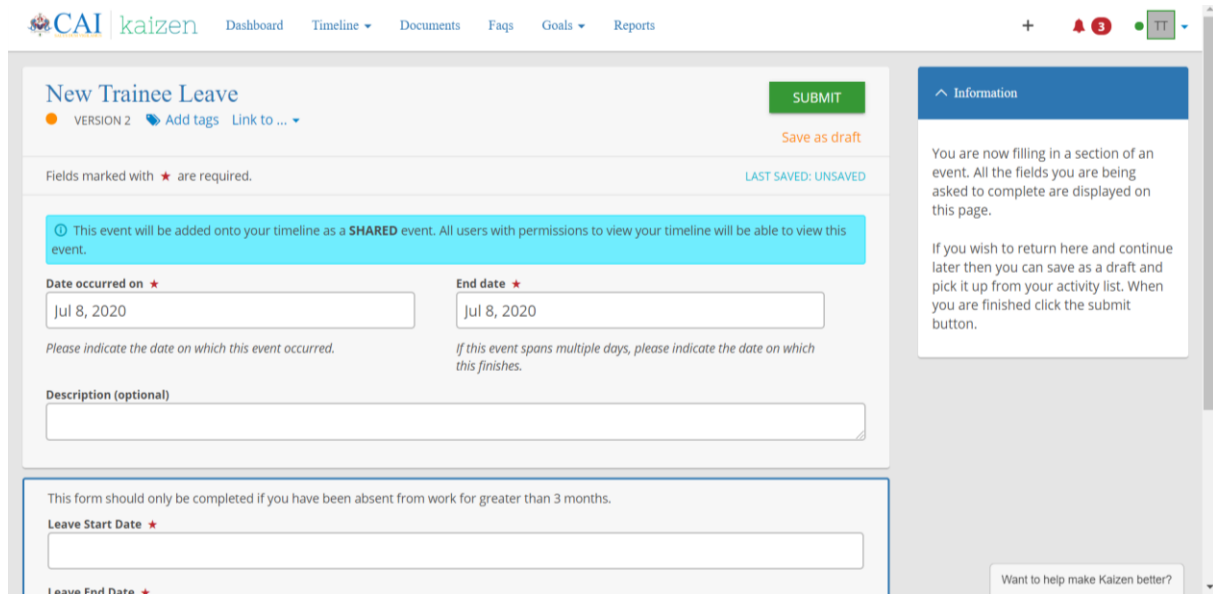
The screenshot shows the 'Documents' page. The navigation bar includes 'CAI kaizen', 'Dashboard', 'Timeline', 'Documents', 'FAQs', 'Goals', and 'Reports'. The page title is 'Documents'. There are two green buttons: 'New folder' and 'Upload document'. A search bar contains the text 'Start typing to search' and a 'Search' button. Below the search bar, it says 'Found 9 items' and 'You are using 2.49 of 500 MB (0.5 %)'. A blue bar indicates 'Ordered by folders then files'. The main content area shows a folder named 'Simulation Courses' with a 'SHARED' status and 'CREATED ON: 2 Jun, 2020'. Below the folder, there are options: 'Rename', 'Hide from navigation', 'Delete', '+ Select', and 'Show more'. Below the folder, there is a document named 'Autumn meeting posters.docx' with a 'PRIVATE' status and 'CREATED ON: 26 Jul, 2019'. Below the document, there are options: 'Download PRIVATE', 'Rename', 'Share', 'Delete', '+ Select', and 'Show more'.

4. Personal Information – Click “personal information” to change any personal details in your e-Portfolio.



The screenshot shows the 'New Personal Information' form. At the top, there is a navigation bar with 'CAI kaizen', 'Dashboard', 'Timeline', 'Documents', 'Faqs', 'Goals', and 'Reports'. The form title is 'New Personal Information' with a 'SUBMIT' button and 'Save as draft' link. Below the title, it says 'VERSION 1' and 'Add tags Link to ...'. A note states: 'Fields marked with * are required. LAST SAVED: UNSAVED'. A warning box indicates: 'This event will be added onto your timeline as a PRIVATE event. Only you will be able to view this event and its contents.' The form contains several input fields: 'Date occurred on *' (with 'Jul 8, 2020' entered), 'End date *' (with 'Jul 8, 2020' entered), 'Description (optional)', 'Phone Number', and 'Address Line 1'. A right-hand sidebar contains an 'Information' section with instructions: 'You are now filling in a section of an event. All the fields you are being asked to complete are displayed on this page. If you wish to return here and continue later then you can save as a draft and pick it up from your activity list. When you are finished click the submit button.'

5. Trainee Leave – Click “Trainee Leave” to record an extended leave of absence, for example due to illness.



The screenshot shows the 'New Trainee Leave' form. At the top, there is a navigation bar with 'CAI kaizen', 'Dashboard', 'Timeline', 'Documents', 'Faqs', 'Goals', and 'Reports'. The form title is 'New Trainee Leave' with a 'SUBMIT' button and 'Save as draft' link. Below the title, it says 'VERSION 2' and 'Add tags Link to ...'. A note states: 'Fields marked with * are required. LAST SAVED: UNSAVED'. A warning box indicates: 'This event will be added onto your timeline as a SHARED event. All users with permissions to view your timeline will be able to view this event.' The form contains several input fields: 'Date occurred on *' (with 'Jul 8, 2020' entered), 'End date *' (with 'Jul 8, 2020' entered), 'Description (optional)', and 'Leave Start Date *'. A note below the 'Leave Start Date' field says: 'This form should only be completed if you have been absent from work for greater than 3 months.' A right-hand sidebar contains an 'Information' section with instructions: 'You are now filling in a section of an event. All the fields you are being asked to complete are displayed on this page. If you wish to return here and continue later then you can save as a draft and pick it up from your activity list. When you are finished click the submit button.' At the bottom right, there is a link: 'Want to help make Kaizen better?'.

6. Completing Workplace Based Assessments - The Trainee fills out all relevant sections of the form. At the bottom of the form, they input the name of the Tutor or Trainer who supervised the assessment.

Section 1

Select Hospital ★

Year of Training ★

Observer's Name ★

Observers IMC Number

Type of Work Based Assessment ★

Link to Curriculum. <https://www.anaesthesia.ie/curriculum/?page=1>

Expected Standard Assessed (See Curriculum)

Example. PA_C.1. PA - (Unit) Peri-Operative Assessment. C - Core Competency. 1 - Standard. GA_M.1. GA - (Unit) General Anaesthesia. M - Module. 16 - Standard. PM_S.15. PM - (Unit)Pain Medicine. S - Speciality module. 15 - Standard.

Details of Case ★

Consultant Feedback

Level of Proficiency ★

Aspects of Good Performance ★

Suggested Areas for Development ★

Trainee Feedback

Learning Outcomes ★

If the Tutor/Trainer wish to complete the form on the same device, they can select “Fill on the same device”. This will give the Tutor/Trainer the option to fill in their comments and confirm whether the information submitted by the Trainee is accurate.

The next section of this form can be filled in by users with these roles: CAI System Admin, Pain Tutor, Test Tutor, Tutor, ICM Tutor, Trainer

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

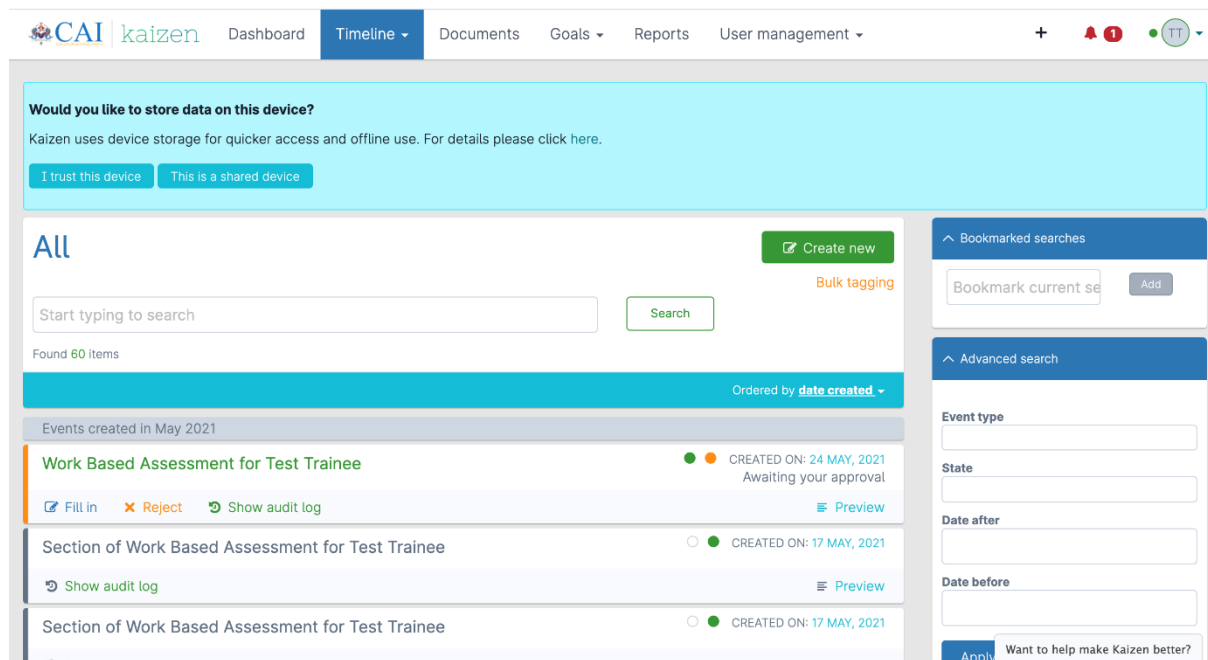
Consultant Response

Comments

This is an accurate reflection of the feedback discussion *

Once a Trainee submits the WBA Form, their Tutor/Trainer must approve it.

The Tutor/Trainer must log in to their own profile, go to their timeline where the WBA will appear in draft form (the colour orange will appear beside it to indicate that it is in draft form).



CAI | kaizen Dashboard **Timeline** Documents Goals Reports User management

Would you like to store data on this device?
Kaizen uses device storage for quicker access and offline use. For details please click here.

All **Bulk tagging**

Found 60 items

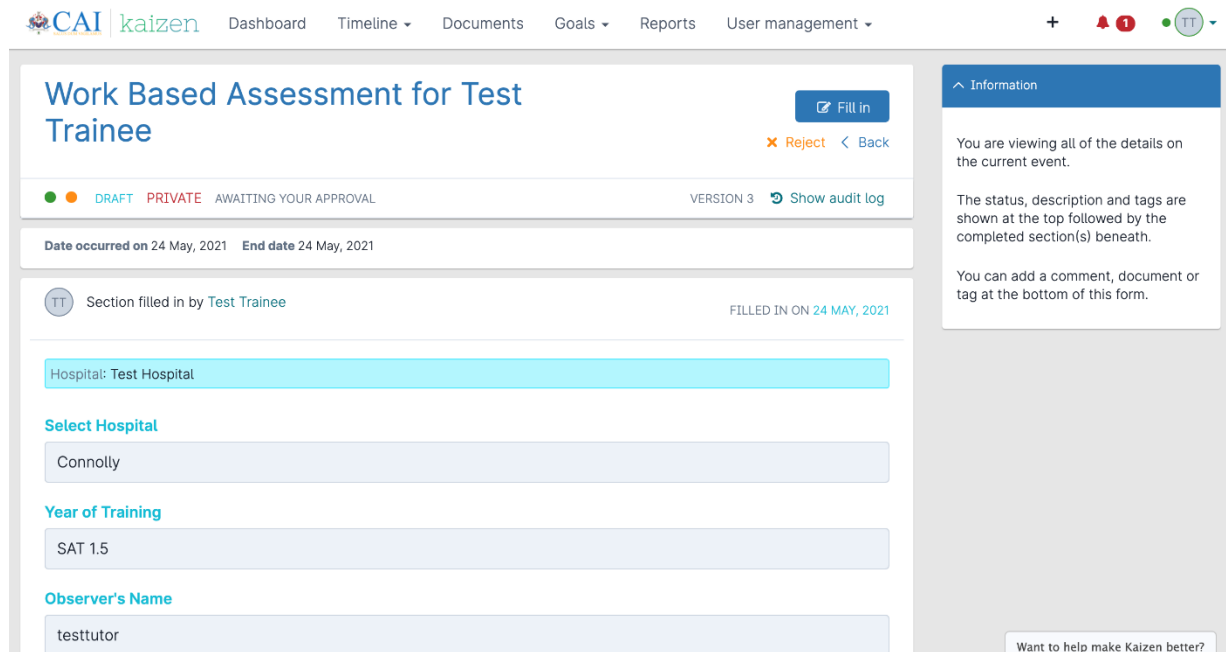
Ordered by **date created**

Events created in May 2021

Work Based Assessment for Test Trainee	● ● CREATED ON: 24 MAY, 2021 Awaiting your approval
<input type="button" value="Fill in"/> <input type="button" value="Reject"/> <input type="button" value="Show audit log"/>	<input type="button" value="Preview"/>
Section of Work Based Assessment for Test Trainee	○ ● CREATED ON: 17 MAY, 2021
<input type="button" value="Show audit log"/>	<input type="button" value="Preview"/>
Section of Work Based Assessment for Test Trainee	○ ● CREATED ON: 17 MAY, 2021

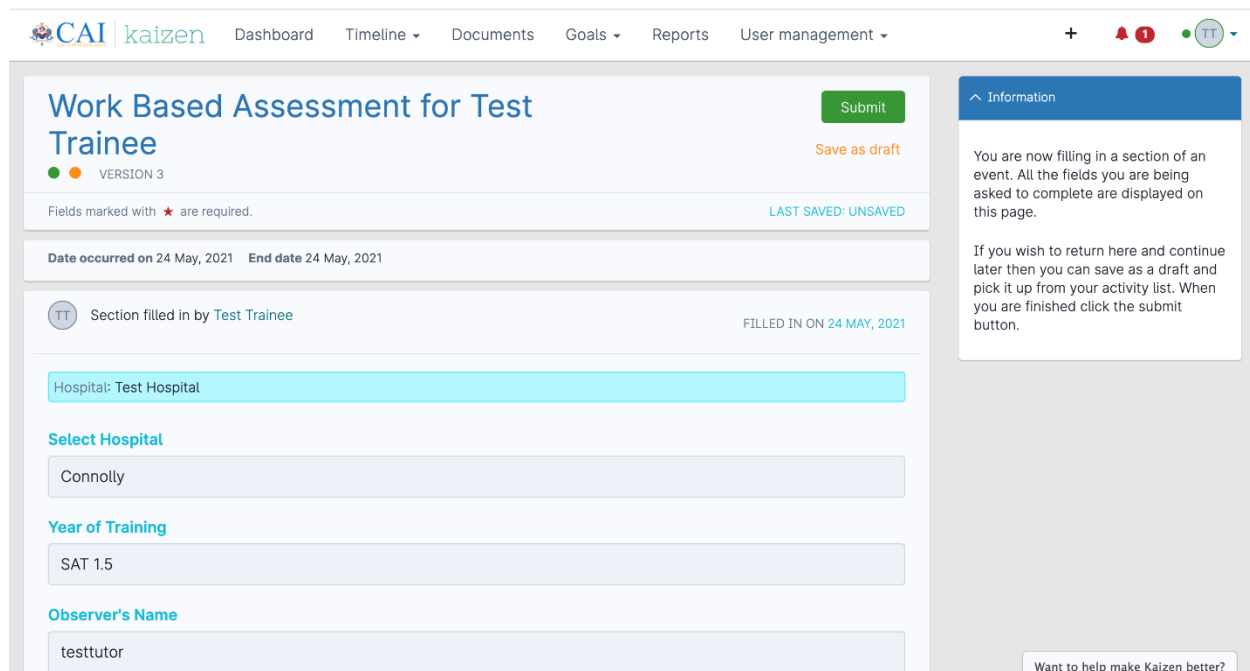
Want to help make Kaizen better?

The Tutor/Trainer must then select the draft WBA, select “Fill in” in the top right corner. They can then review the form and make/edit their comments on the assessment.



The screenshot shows the 'Work Based Assessment for Test Trainee' form in a 'DRAFT' status. The top navigation bar includes 'CAI | kaizen', 'Dashboard', 'Timeline', 'Documents', 'Goals', 'Reports', and 'User management'. The form title is 'Work Based Assessment for Test Trainee' with a 'Fill in' button. Below the title, there are status indicators: 'DRAFT', 'PRIVATE', and 'AWAITING YOUR APPROVAL'. The version is 'VERSION 3' with a 'Show audit log' link. The dates are 'Date occurred on 24 May, 2021' and 'End date 24 May, 2021'. A notification indicates 'Section filled in by Test Trainee' on '24 MAY, 2021'. The form fields are: 'Hospital: Test Hospital', 'Select Hospital' (dropdown with 'Connolly'), 'Year of Training' (dropdown with 'SAT 1.5'), and 'Observer's Name' (text input with 'testtutor'). A right-hand 'Information' panel provides instructions on viewing details and adding comments. A 'Want to help make Kaizen better?' link is at the bottom right.

To finalise the WBA, the Tutor/Trainer then selects “Submit” on the top right hand corner, and the WBA is completed.



The screenshot shows the 'Work Based Assessment for Test Trainee' form in a 'Submit' status. The top navigation bar is the same as in the previous screenshot. The form title is 'Work Based Assessment for Test Trainee' with a 'Submit' button and a 'Save as draft' link. Below the title, there are status indicators: 'VERSION 3'. A message says 'Fields marked with * are required.' and 'LAST SAVED: UNSAVED'. The dates are 'Date occurred on 24 May, 2021' and 'End date 24 May, 2021'. A notification indicates 'Section filled in by Test Trainee' on '24 MAY, 2021'. The form fields are: 'Hospital: Test Hospital', 'Select Hospital' (dropdown with 'Connolly'), 'Year of Training' (dropdown with 'SAT 1.5'), and 'Observer's Name' (text input with 'testtutor'). A right-hand 'Information' panel provides instructions on filling in sections and saving as a draft. A 'Want to help make Kaizen better?' link is at the bottom right.

Further Information on WBA's

Each module in the curriculum outlines which kind of WBA can be completed. Please see below entry on the Peri-operative Management Module for example. You can see here which kind of Workplace Based Assessment should be completed for each expected standard which is being assessed.

Peri-operative Management

Description:

At the end of training, the trainee will be able to provide perioperative care for patients with significant co-morbidities, including pre-operative assessment and risk stratification, preparation and optimisation prior to surgery, and plan for early postoperative care to minimise potential harmful consequences of surgery.

Legend for Competency Table

	Domain	KSA	Expected Standards	Assessment
			HISTORY TAKING	
PA_C_1	2,3	A	Communicates in a satisfactory manner with the patient	Mini-CEX
PA_C_2	2	S	Obtains a relevant history Recognises the importance of different elements of history Recognises that patients do not always present history in a structured fashion Knows the likely causes and risk factors for conditions relevant to mode of presentation Recognises that the patient's concerns and the history should inform examination, investigation and management	Mini-CEX
PA_C_3	2,3	S	Demonstrates satisfactory proficiency in obtaining a history specifically relevant to the planned anaesthesia and surgery including: A history of the presenting complaint for surgery A systematic comprehensive relevant medical history	IAC
PA_C_4	6	K	Gives examples of how common co-existing diseases affect anaesthetic management and perioperative risk	MCAI

For further information on WBAs, please visit the CAI Hub and our e-Curriculum.

Link to the CAI Hub: <https://www.thecaihub.com/>

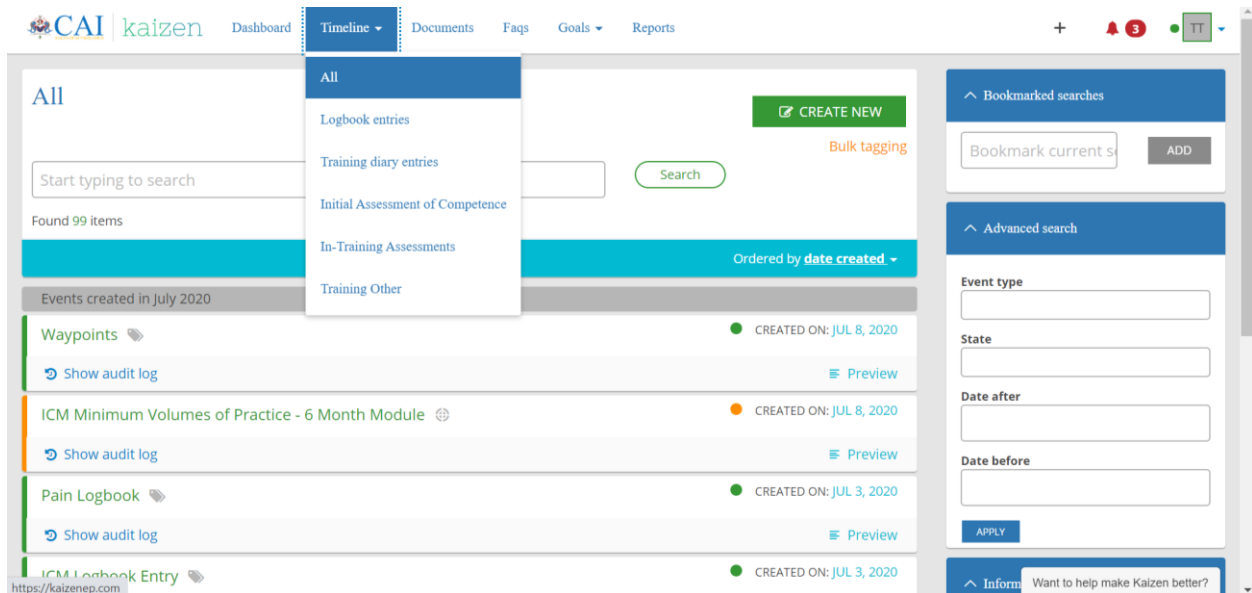
Link to the e-Curriculum: <https://www.anaesthesia.ie/curriculum/?page=1>

Please be advised that should a Trainer wish to assess WBAs, they can send an email to Training@coa.ie and we will then grant their Kaizen profile access to the WBAs.

TIMELINE IN MORE DETAIL:

5 Options to choose from:

1. All - this will give you a list of everything you have created in your e-Portfolio. Items in colour “Green” are submitted and items in colour “Orange” are in draft. If you have, multiple entries to add you can stay on this screen and click “Create New”. Once you submit the form it will bring you back to this screen and you can create new forms as many times as you like.
2. Logbook Entries – this will give you a list of all of your logbook entries.
3. Training Diary Entries – this will give you a list of all your training diary entries.
4. Initial Assessment of Competence – this will give you a record of your IAC
5. In Training Assessments – this will give you an over view of your ITAs
6. Training Other – this will give you an over view of any additional documents you have added to your e-Portfolio



The screenshot shows the 'Timeline' section of the CAI Kaizen e-Portfolio. The navigation bar includes 'Dashboard', 'Timeline', 'Documents', 'Faq's', 'Goals', and 'Reports'. The 'Timeline' dropdown menu is open, showing options: 'All', 'Logbook entries', 'Training diary entries', 'Initial Assessment of Competence', 'In-Training Assessments', and 'Training Other'. The main content area displays a list of items under the 'All' filter, ordered by 'date created'. The items are:

- Waypoints (Green dot) - CREATED ON: JUL 8, 2020
- ICM Minimum Volumes of Practice - 6 Month Module (Orange dot) - CREATED ON: JUL 8, 2020
- Pain Logbook (Green dot) - CREATED ON: JUL 3, 2020
- ICM Logbook Entry (Green dot) - CREATED ON: JUL 3, 2020

Each item has a 'Show audit log' link and a 'Preview' link. A 'CREATE NEW' button and a 'Bulk tagging' link are also visible. The right sidebar contains 'Bookmarked searches', 'Advanced search' filters (Event type, State, Date after, Date before), and an 'APPLY' button.

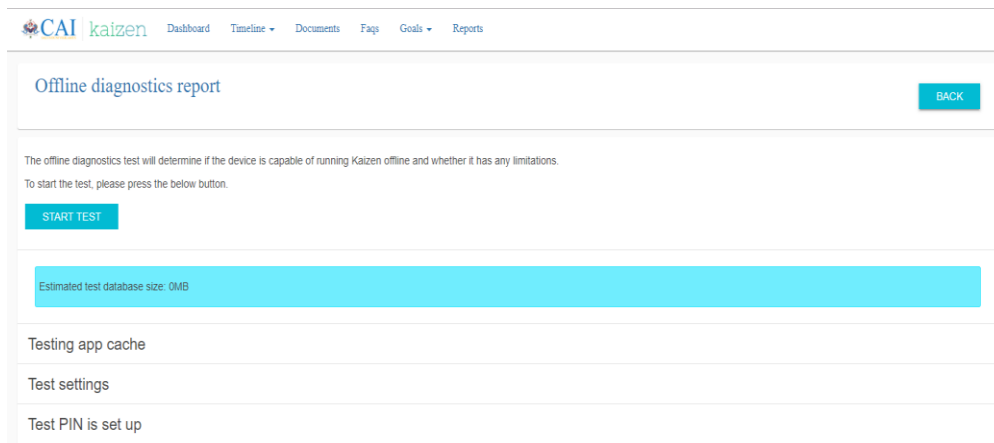
HOW TO CREATE ENTRIES OFFLINE:

This is a once off process to set up a device for offline use. This setting should only be used on personal devices.

1. Click on your initials on the top right hand corner of the page. Click on Diagnose.



2. Click on "start test".



3. Once this has finished. You will need to set an offline PIN number. Click "SET". When logging in offline you will only need to use this PIN number.



Support:

For any queries relating to your e-Portfolio for Training please contact:

The Training Department on: Training@coa.ie

We would also value your feedback on the e-Portfolio for Training so please contact us.