CSRH Guidance Note 5

Educational Supervisor Report and Preparing for ARCP in the 2021 Curriculum

1. Introduction
This guidance note has been produced to help guide Community Sexual and Reproductive Health (CSRH) Trainees and Educational Supervisors (ESs) while compiling the new Educational Supervisor’s Report introduced in January 2022. The ESR is a document that is usually compiled both by the Trainee and the ES in the lead up to the Annual Review of Competence Progression (ARCP), for this reason, this document mentions the ARCP process and related key milestones.

The ESR should be signed and submitted on the Trainee’s ePortfolio at least two weeks before the date of the ARCP. Reviewing the evidence, creating ratings and comments, and filling in the ESR can be a lengthy process, so make sure to start in advance to allow you enough time to comfortably submit the ESR. The process involves a high level of self-analysis and assessment of their progress on the Trainee’s part and comments, assessments, and plans for training from the ES.

Both the Trainee and the ES are expected to give ratings and make comments on all the Key Skills and the Capabilities in Practice (CiPs) of the 2021 Curriculum before each ARCP. The ratings and comments will be automatically pulled through to the ESR form on the ePortfolio. For this reason, it is crucial that both the Trainee and the ES rate and comment on each Key Skill and CiP before they complete the ESR to not have any gaps on the form.

2. Preparing for ARCP
Before starting to fill in the ESR both the Trainee and ES should create ratings and comments on the Trainee’s progress in relation to the Key Skills, CiPs, and Matrix of Progression. Both Trainees and ESs usually benefit from having in person Educational Meetings (if possible) to discuss progress and plans for the future as well as the information and evidence that will be included in the ESR.

As a Trainee

Curriculum 2021
The first step to prepare is to make sure that all the information on your ePortfolio is accurate and up to date. This includes your post details, Educational Supervisors details, full time/less than full time status, absences, day off sick etc. Most of this information will be automatically pulled through from your ePortfolio so make sure it is all up to date in the relevant sections.

Once you have reviewed and updated your general information, make sure you have linked all your evidence to your Key Skills and CiPs. Remember, you can link one piece of evidence to maximum seven Key Skills across three CiPs. You should rely on a breath of

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1 This information cannot be changed by the Trainee. If you need to change it, please get in touch with the Specialty Development Officer.
different methods of assessments and forms to show different ways of reflecting and learning from your encounters and activities.

You can now move on to adding comments and ratings on your curriculum items. To add comments and ratings to your Curriculum, login to your ePortfolio and navigate to the Curriculum tab on the top bar. From here select Community Sexual and Reproductive Health (CSRH) Curriculum 2021.

Here you will find all the CiPs and Key Skills with all the forms that you have linked to them. To view the Key Skills under the CiPs, click on the folder icon on the left of the CiP. From here you will be able to click on rate on the right side.

We suggest rating and commenting on each Key Skill first and then rating and commenting the overall CiP. When you are commenting on your Key Skills remember to be thorough and
reflective, to mention the evidence that you have linked and to make sure to comment on your progress. Please note that only your comments on the CiPs will be pulled through to the ESR so make sure that what you write is comprehensive, specific, thorough, and that it references the comments and ratings of the Key Skills. Also, make sure to mention plans for training in the future, whether there are any gaps or issues and how you and your ES plan on addressing them in the future.

An extensive and exhaustive review from the Trainee and the ES helps the ARCP Panel Reviewer when they are assessing your ESR and evidence. They will firstly look at your ESR (which will only include the ratings and comments of the CiPs) to guide their assessment and then they will review your Key Skills and the evidence that you have linked. Keeping this in mind, make sure that the comments that you add are reflective and mention your linked evidence to help the ARCP Reviewer navigate your ePortfolio and get a sense of your experience and training.

To enter a rating and a comment, click on rate on the relevant Key Skill or CiP. A tab will be brought up and you will be able to add the rating and comment.

Once you are finished, you can click on save and you should be able to see your comment and rating under the Key Skill/CiP.
Please note: Clinical Supervisors (CS) can comment and rate both your CiPs and Key Skills and it might be appropriate for them to do so. This does not substitute the rating and comments of your ES who is the one in charge of overseeing your training in all areas. Your CS ratings and comments can inform and support the ratings and comments of your ES but are not a substitute and will not be pulled through to the ESR.

Clinical Expert
The procedures and their expected levels of entrustability can be found under the Curriculum tab by selecting Clinical Expert.

Here you will be able to see all of the procedures and the forms that have been linked to them. You can also give yourself a rating according to the evidence that you have accumulated. Your Educational Supervisor will need to go into this section of your curriculum, review your evidence and give you a final rating to sign off your competence in the procedure.
Once they do this, you will be able to see their comments and ratings here and in the Procedures Summary table. Only your ES’s ratings will turn the button green on the Procedures Summary table. You can access the table by navigating to the Progress tab and selecting Procedures Summary.

Here you can see your expected level of entrustability for each procedure for your level of training as well as the evidence linked. If your ES has signed off the procedure the radio button next to the level will be green.
Please note: Those that have transferred to the 2021 Curriculum, do not need to repeat forms for competences that were already signed off before the transfer. If this is the case, the ES and the Trainee should have filled in a gap analysis together, after which, the ES can rate the Trainee at the appropriate level even if there is no OSATS linked. The gap analysis should be uploaded to your personal library and easily available. You can refer to the gap analysis in your comments and ratings.

As an Educational Supervisor
Curriculum 2021
When you are ready to add ratings and comments to your Trainee’s Curriculum you can navigate to their ePortfolio, click on the Curriculum tab, and select Community Sexual and Reproductive Health (CSRH) Curriculum 2021.

Here you will be able to see the different curriculum items and the evidence that the Trainee has linked to them as well as the Trainee’s comments and ratings as well as potential comments and ratings from other users such as Clinical Supervisors.

Please note: while it might be appropriate for Clinical Supervisors to add comments and ratings to Curriculum items, these do not substitute the comments and ratings of the ES and they will not be pulled through to the ESR.
To view the Key Skills under the CiPs, click on the folder icon on the left of the CiP. From here you will be able to click on rate on the right side.

We suggest rating and commenting on each Key Skill first and then rating and commenting the overall CiP. When you are commenting on your Key Skills remember to also be thorough and reflective, to mention the evidence that the Trainee has linked and to make sure to comment on their progress. Please note that only your comments on the CiPs will be pulled through to the ESR so make sure that what you write is comprehensive, specific, thorough, and that it references the comments and ratings of the Key Skills. Also, make sure to mention plans for training in the future, whether there are any gaps or issues and how you plan on addressing them in the future.

An extensive and exhaustive review from the Trainee and the ES helps the ARCP Panel Reviewer when they are assessing the Trainee’s ePortfolio. They will firstly look at the ESR (which will only include the ratings and comments of the CiPs) to guide their assessment and then they will review the Key Skills and the evidence that you have been linked. Keeping this in mind, make sure that the comments that you add are reflective and mention the linked evidence to help the ARCP Reviewer navigate the ePortfolio and get a sense of the Trainee’s experience and training.
To enter a rating and a comment, click on rate on the relevant Key Skill or CiP. A tab will be brought up and you will be able to add the rating and comment.

Once you are finished, you can click on save and you should be able to see your comment and rating under the Key Skill/CiP.

**Clinical Expert**
The procedures and their expected levels of entrustability can be found under the Curriculum tab by selecting Clinical Expert.

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accumulated. You will need to review the evidence and give a final rating to sign off their competence in the procedure.

You will be able to see their comments and ratings here. Only the ES’s ratings will turn the button green on the Procedures Summary table. You can access the table by navigating to the Progress tab and selecting Procedures Summary.
Here you can see the expected level of entrustability for each procedure for the Trainee’s level of training as well as the evidence linked. If you have signed off the procedure the radio button next to the level will be green.

**Please note:** Those that have transferred to the 2021 Curriculum, do not need to repeat forms for competences that were already signed off before the transfer. If this is the case, the ES and the Trainee should have filled in a gap analysis together, after which, the ES can rate the Trainee at the appropriate level even if there is no OSATS linked. The gap analysis should be uploaded to the Trainee personal library and easily available.

3. Creating and Filling in the ESR

Once both the Trainee and ES have reviewed the evidence and commented and rated the curriculum items as well as the clinical expert curriculum, you can create the ESR form. Make sure that you save the ESR in draft while you are still working on it. Once you are ready to submit the form make sure that you save the form not in draft but in its final form. Once the form has been saved, both the ES and the Trainee need to go and add their signature on the form. You can do this by navigating to the form, selecting link on the right-hand side, and selecting signature from the drop-down menu.
Please note: It is really important that both ES and Trainee sign the ESR to express that they agree and subscribe to what has been recorded in the form. Not signing the form after it has been saved not in draft equals to a non-submission of the form for ARCP.

Section 1 – General Information
Most of the information in this section is automatically pulled through from information on the ePortfolio. Make sure you fill in the sections that are not automatically filled in. This can be done by the Trainee or the ES. Under the section that says “time assessed” make sure that you select the right dates. This parameter is what the system will use to link to your posts and forms such as the TO2s that will be pulled through in Section 3.

Section 2 – Capabilities in Practice and Procedures
The information in this section is automatically pulled through from the ratings and comments that have been added to the Curriculum tab. For more on this please see above.

There is a section to be completed under CiP 8, which should be filled in by the ES.

Section 3 – Matrix Requirements
Under this section, both the Trainee and the ES are expected to review the requirements of the Matrix of progression (which can be found on the FSRH website) and state if the Trainee has met these or not. The TO2s are automatically pulled through from any TO2s linked to your post in the ePortfolio.
Section 4 – Global Judgement
Part A, B, and D of this section should be filled in by the ES only. Part C has a section where the Trainee can give feedback on the global judgement of the ES.

Section 5 – Revalidation
In preparation for the ARCP, the Educational Supervisor must review both the Trainee’s Self Declaration (Enhanced Form R) and obtain reports from any Clinical Supervisors where the trainee is functioning outside of the Educational Supervisor’s direct management (and these should include responses to the two specific questions regarding any involvement in Significant Events/complaints and any fitness to practice or conduct issues). Note that the Trainee’s Self Declaration (Enhanced Form R) includes “any other activity undertaken in” [their] “capacity as a registered medical practitioner including all locum and non-NHS work