RACP
Specialists. Together
EDUCATE ADVOCATE INNOVATE

Observation Captures

Trainee Guide: TMP Portal

Purpose	Use this guide as a Trainee for guidance on how to create, complete and review your Observation Captures in the Training Management Platform.
Intended Audience	All Trainees
Context	This guide is designed to help the Trainees manage learning and assessment requirements in the TMP Portal i.e. create, monitor, view, submit and cancel the Observation Captures.

How to use this document:

The document is structured into 3 sections, representing key Observation Captures Tool Guide for Trainees learning outcomes.

To open the navigation pane in Adobe Acrobat, navigate to the left side of your screen and click on the ‘arrow’ icon and then the 'bookmark' icon.

RACP
Specialists. Together
EDUCATE ADVOCATE INNOVATE

Contents

Section 1: Login to the Portal 3
Section 2: View your Observation Capture requirement 5
Section 2.1: Create an Observation Capture 9
Section 2.2: Create Feedback Request 16
Section 2.3: View Observation Captures and Monitor Feedback Request 21
Section 2.4: Submit a reflection for your Observation Capture initiated by your Supervisor 26
Section 2.5: Cancel Observation Capture 31
Section 3: Summary of Outcomes 34

Version control

Update by	Date	Version	Note
TMP Project	22/01/25	2.0	Final version - Horizon 2C updates added
TMP Project	19/11/24	1.0	Initial version

Section 1: Login to the Portal

Context: Use these instructions to log into the Training Management Platform (TMP) Portal as a Trainee.

1. Navigate to the TMP Portal and click on **Sign in** located on the top right corner of the screen. Refer to **Figure 1**.

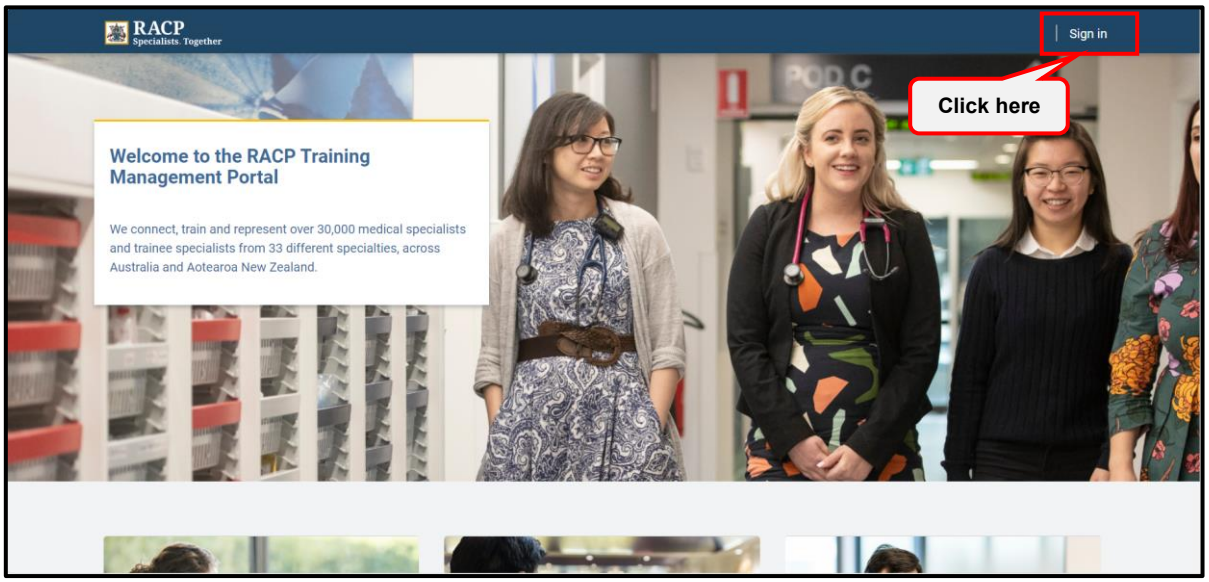

Figure 1

2. Enter your RACP User ID and click on **Next**. Refer to **Figure 2**.

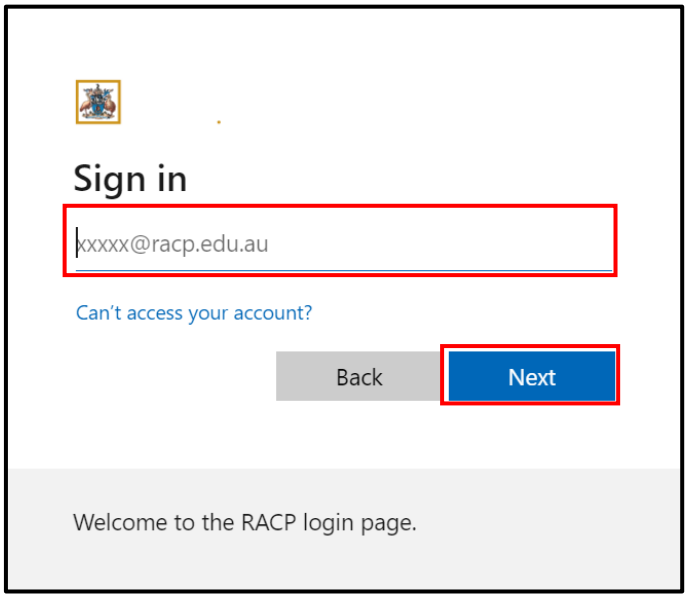

Figure 2

3. Enter your password and click **sign in**. Refer to **Figure 3**.

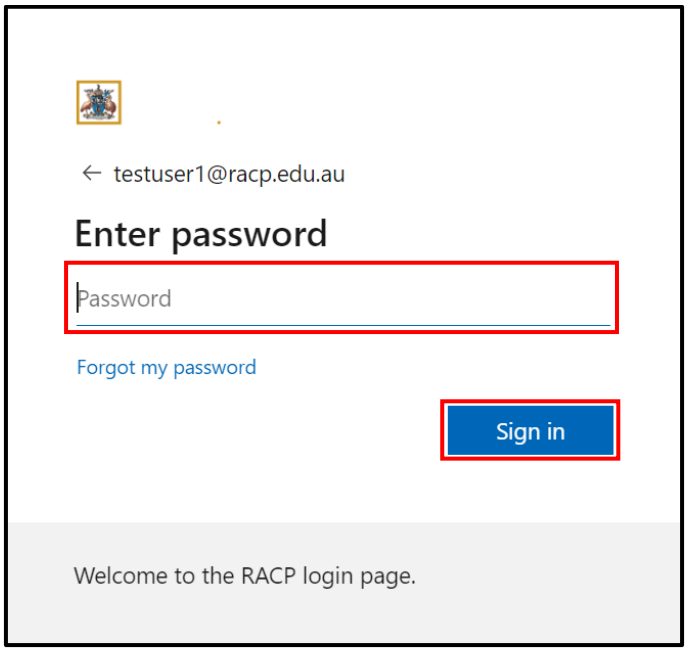

Figure 3

Section 2: View your Observation Capture requirement

Context: Use these instructions to view your Observation Capture program requirements and completed Observation Captures.

1. On the landing page, navigate to **Primary Navigation / Menu Bar** > **My Trainings**. Refer to **Figure 4**.

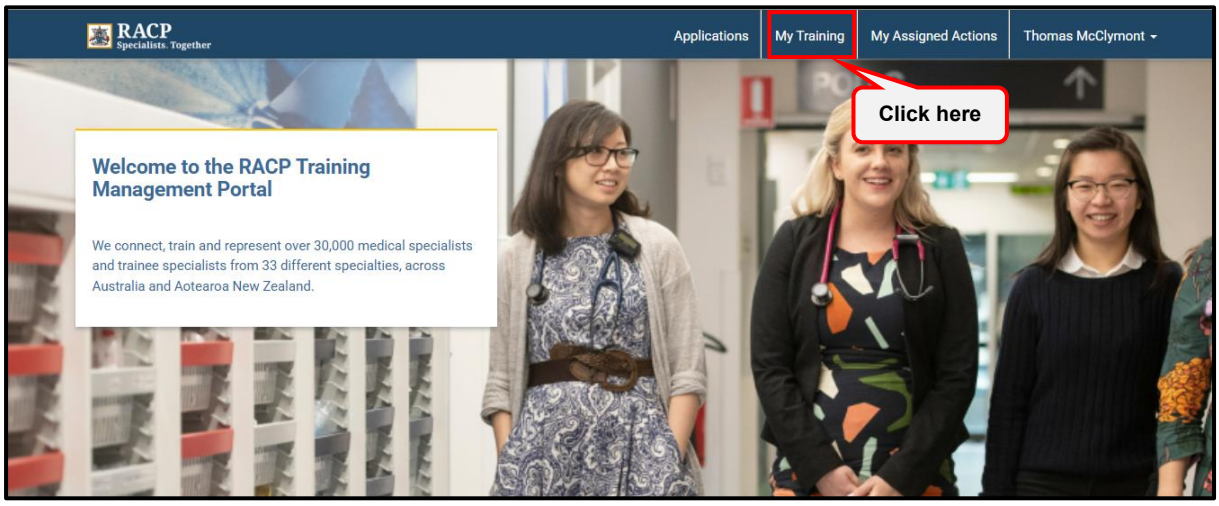

Figure 4

2. From the **My Training** page, observe your Training Program under the **Training Programs** heading. Refer to **Figure 5**. Go to Step 4 to learn how to access your observation capture using this method.

3. Alternatively, you can also access your Observation Capture assessment requirement via the **Assessment Requirements Due Next** section. Refer to **Figure 5**.

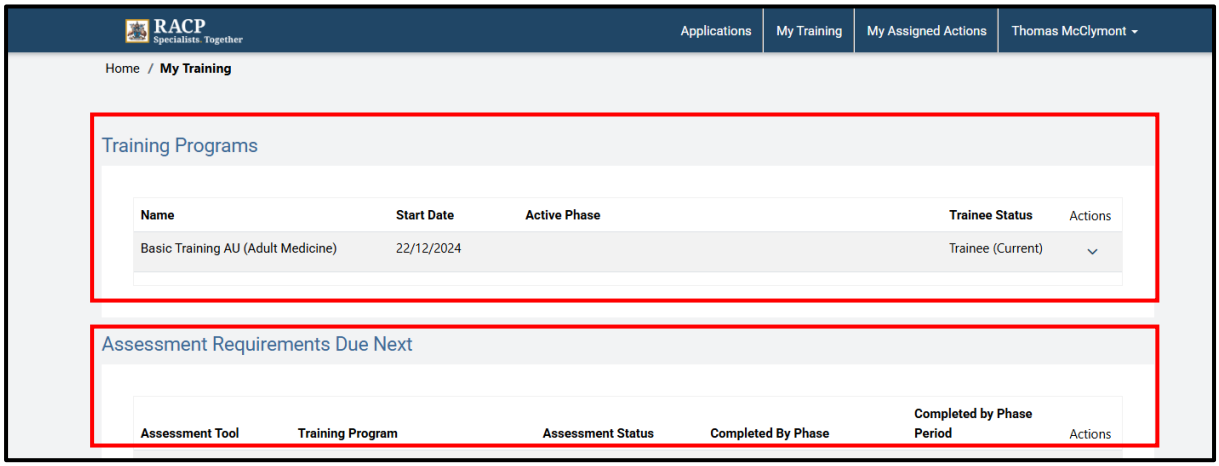

Figure 5

Note: *Please ensure that you select the correct Training Program Cohort as this information is not editable once you start creating the Observation Capture.*

4. To access your Observation Capture assessment requirement via **Training Programs,** expand the downward arrow and click on **View details** to open it. Refer to **Figure 6** for an example.

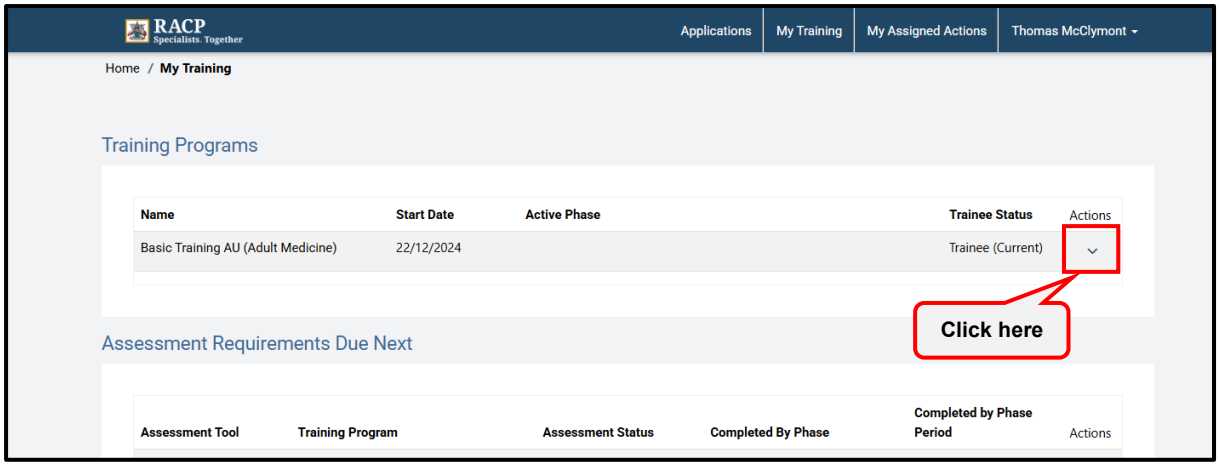

Figure 6

5. Navigate to the **Assessment Requirements tab** > **Phase Requirements section** > **My Open Assessments**. These are your Assessment Requirements. Refer to **Figure 7.**

6. Click on the assessment requirement that shows **'Observation Capture'** under the **Assessment Tool** column in the grid. Refer to **Figure 7**.

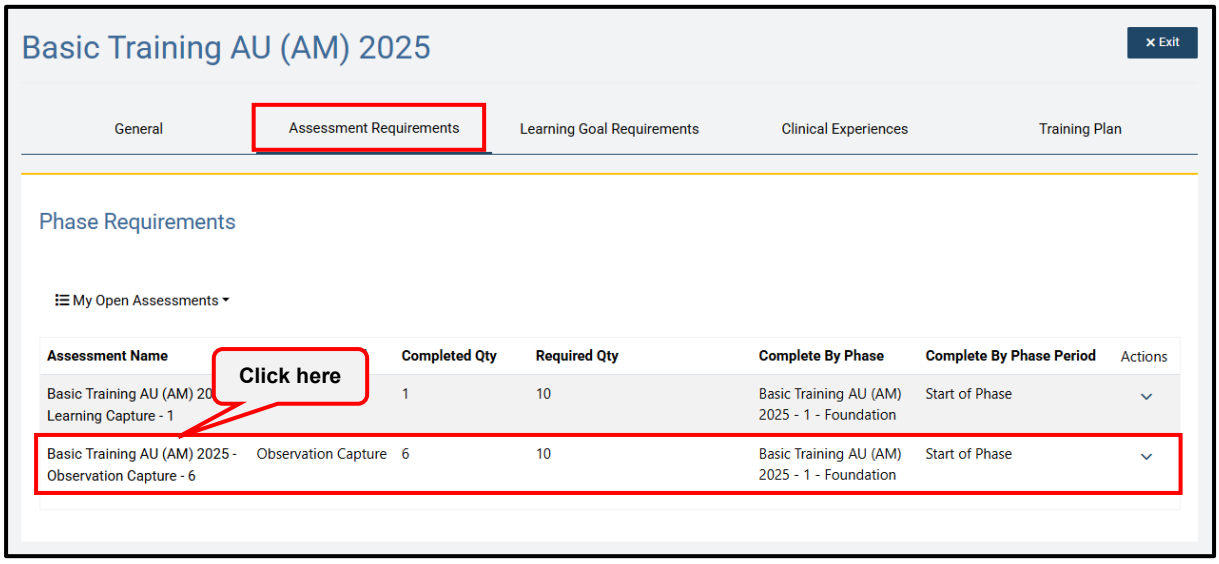

Figure 7

7. To access via **Assessment Requirements Due Next** section, look within the list of requirements which shows **'Observation Capture'** in the **Assessment Tool** column. Refer to **Figure 8.**

8. For the Observation Capture you want to open, click on the down arrow under **Actions** column. Refer to **Figure 8.**

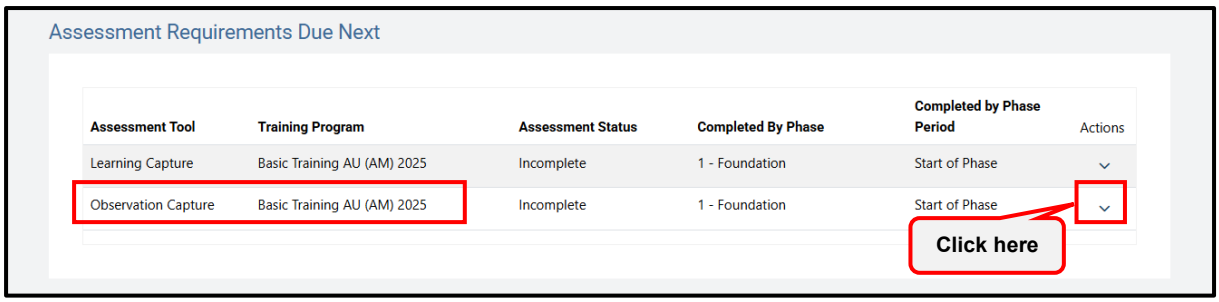

Figure 8

Note: *Assessment Status options you may see under your Assessment Requirements include '**Incomplete**', '**Submitted**', '**In review**' and '**Request for correct information**'. The assessment status refers to your assessment requirement, not the observation capture itself; however, your observation capture actions will contribute to the assessment requirement record.*

9. Click on **'Add/Edit'** as you expand the arrow for the Observation Capture you want to open. Refer to **Figure 9**.

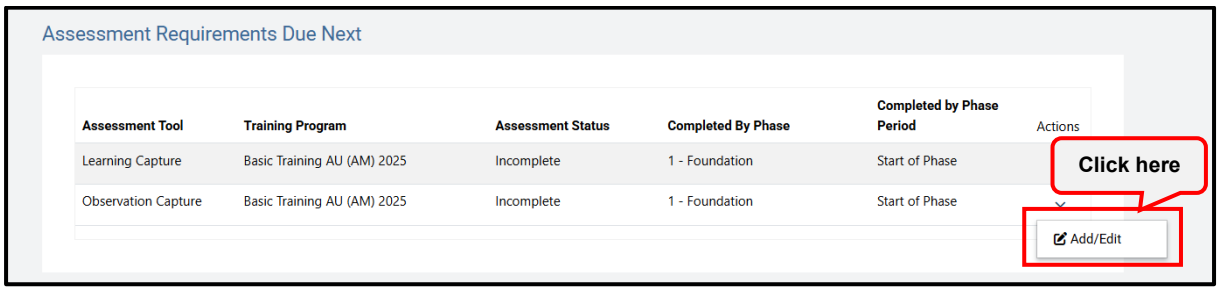

Figure 9

Note: *The information you see in the Completed by Phase and Completed by Phase Period columns will outline when the assessment should be submitted. The information displayed will be relevant to the training program you are enrolled in.*

10. The **Assessment Requirement Details** page will appear. Refer to **Figure 10.**

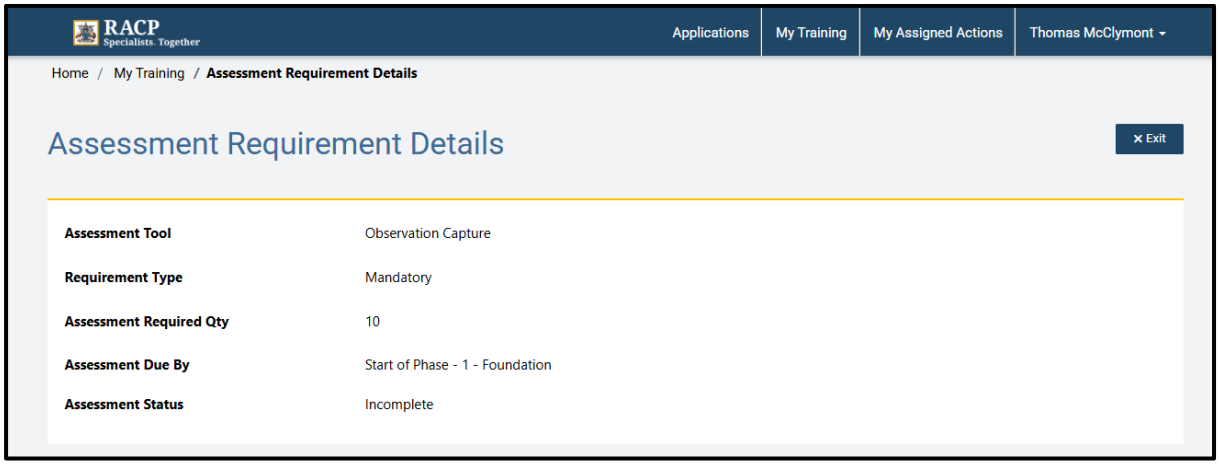

Figure 10

Section 2.1: Create an Observation Capture

Context: An Observation Capture is an assessment tool where a trainee is observed by an assessor undertaking a particular activity to demonstrate their skills and knowledge in one learning goal. Details about the Observation Capture, a trainee reflection and assessor feedback on the observation are documented in a form in the TMP. There are two main ways an Observation capture can be initiated and completed.

Trainee-initiated: A trainee can create an Observation Capture which requires details about the observation and the trainee's reflection. The trainee must then submit a feedback request to one of the following assessors who will provide feedback to the trainee on the activity detailed in the observation capture, based on what was observed.:

- One of your assigned supervisors (i.e. DPE, Rotation Supervisor, nominated Education Supervisor). Refer to **Section 2.2**.
- A supervisor who has a TMP account but is not your assigned supervisor. Refer to **Section 2.2**.
- A non-FRACP member, or other colleague/assessor who does not have a TMP account. This could include nurses, allied health and non-physician doctors. Refer to **Section 2.2**.

Note: In a trainee-initiated Observation Capture, a trainee can enter feedback that has been dictated to them by the assessor or the assessor can enter their feedback directly using the trainee's device at the time of the observation. This feedback will then be sent to the assessor for validation to ensure they are satisfied with what has been entered.

Assigned supervisor-initiated: One of your assigned supervisors can create an Observation Capture, the supervisor will add in the details about the observation encounter and their feedback. The observation capture details are then sent to the trainee to complete a trainee reflection on the observation. The Observation Capture is considered complete once the reflection has been added. Refer to **Section 2.4**.

1. Repeat Steps mentioned in **Section 2** above to navigate to this page.
2. Scroll down to the **Observation Captures** section and click on **'+ Add Observation Capture'** button to create a new observation. Refer to **Figure 11**.

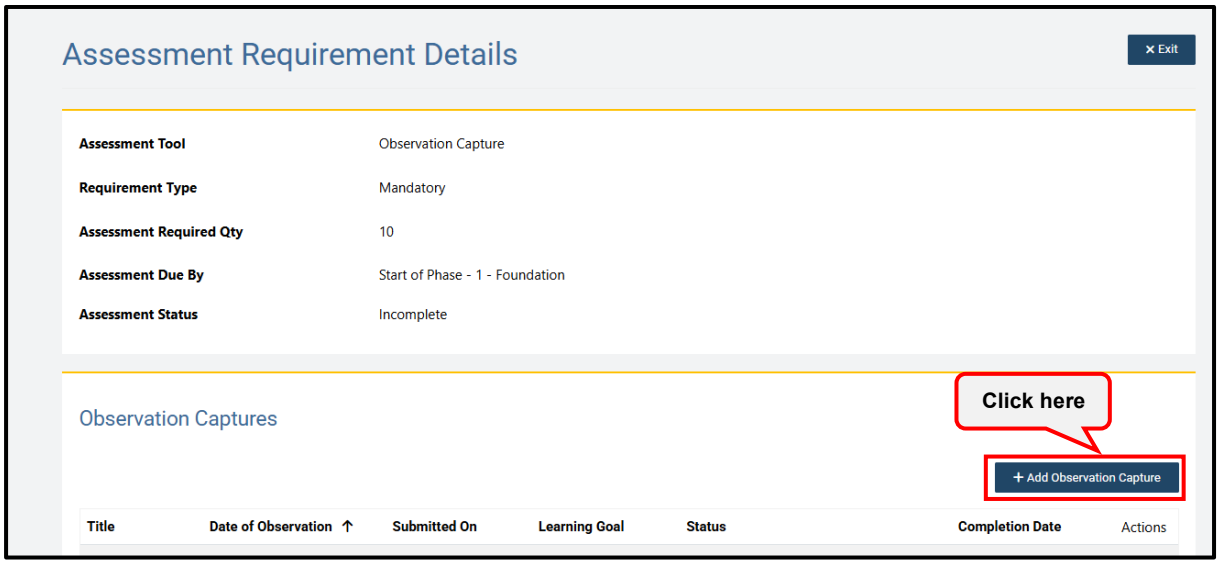

Figure 11

3. The **New Observation Capture** form will appear. Populate the **Training Program Phase** by clicking on the search icon. Refer to **Figure 12**.

Note: *If there is an active Training Program Phase, this field will be auto populated to reflect the training phase you are currently enrolled in. If you need to create an Observation Capture against a different phase of training due to progression conditions, you can use the magnifying icon to do this. The Training Program Phase is still editable.*

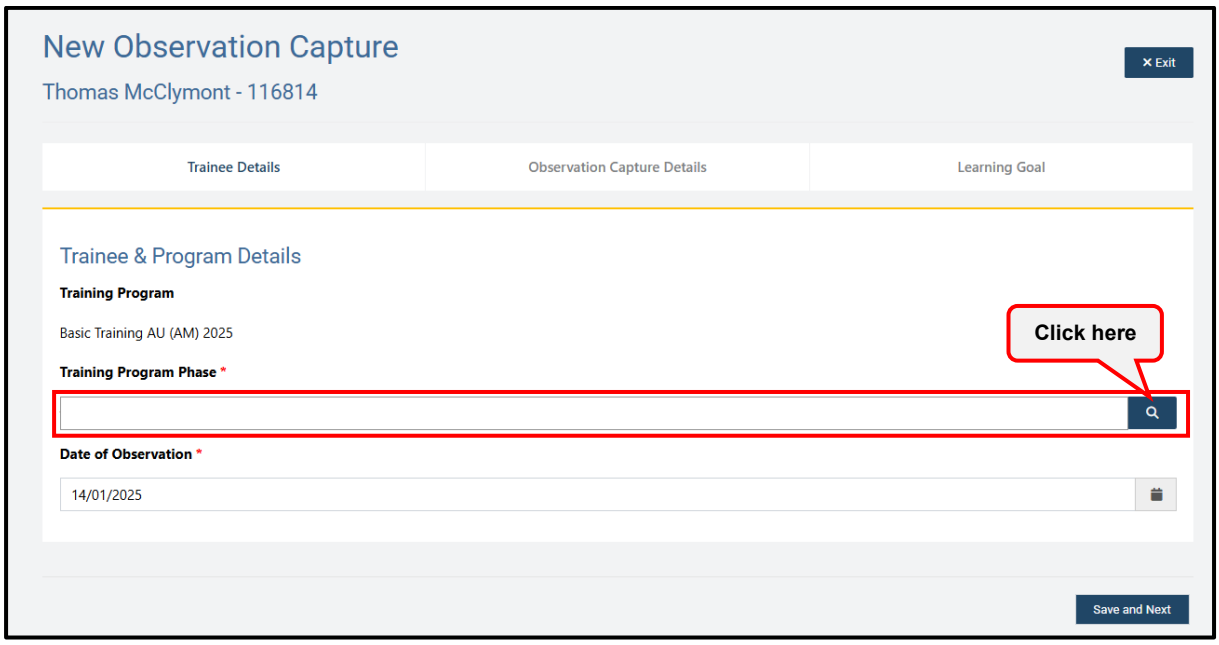

Figure 12

4. In the **Lookup records**, select the phase by checking the box and click **Select**. Refer to **Figure 13**.

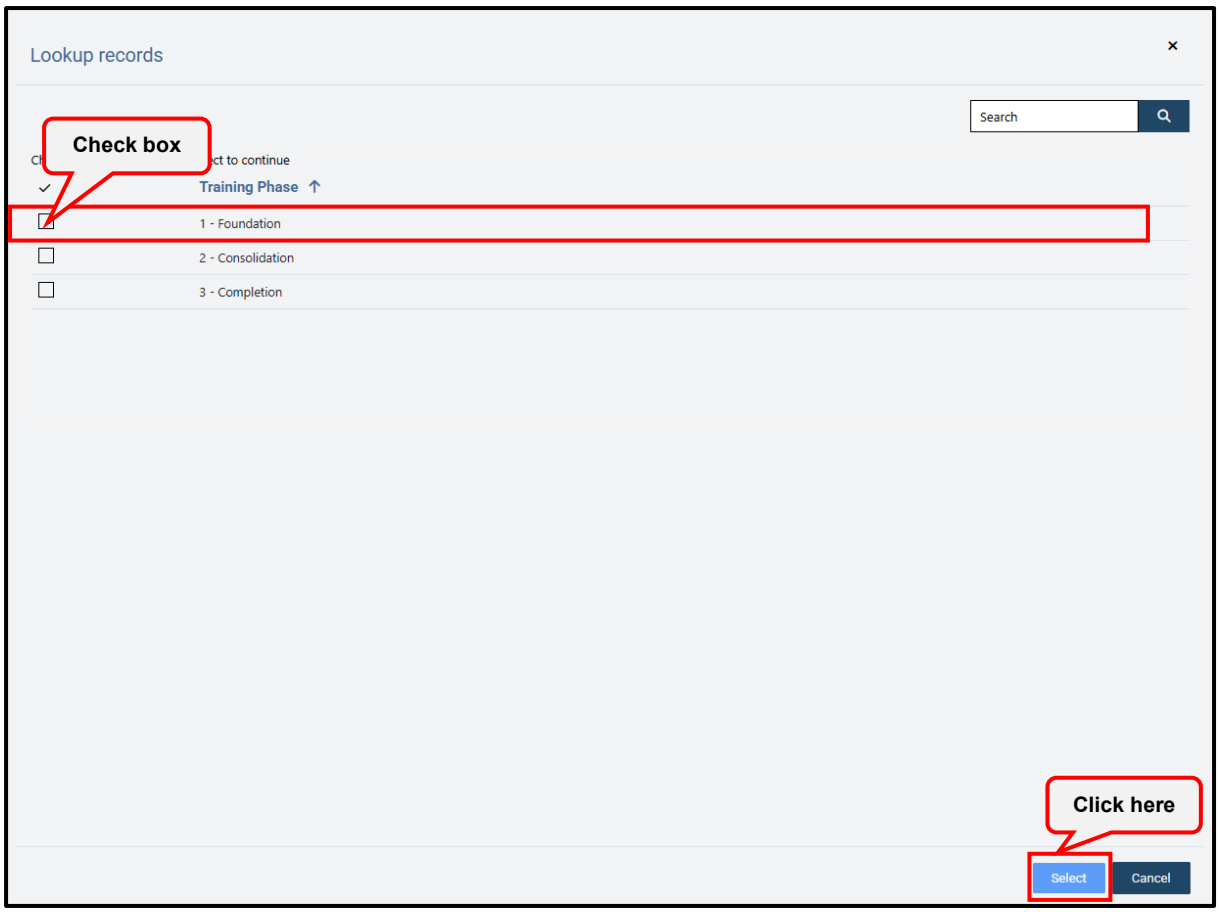

Figure 13

5. The **Date of Observation** field will auto-populate today's date. Click on the **calendar icon** the select the date or input the date manually. Refer to **Figure 14.**
6. Click **Save and Next**. Refer to **Figure 14.**

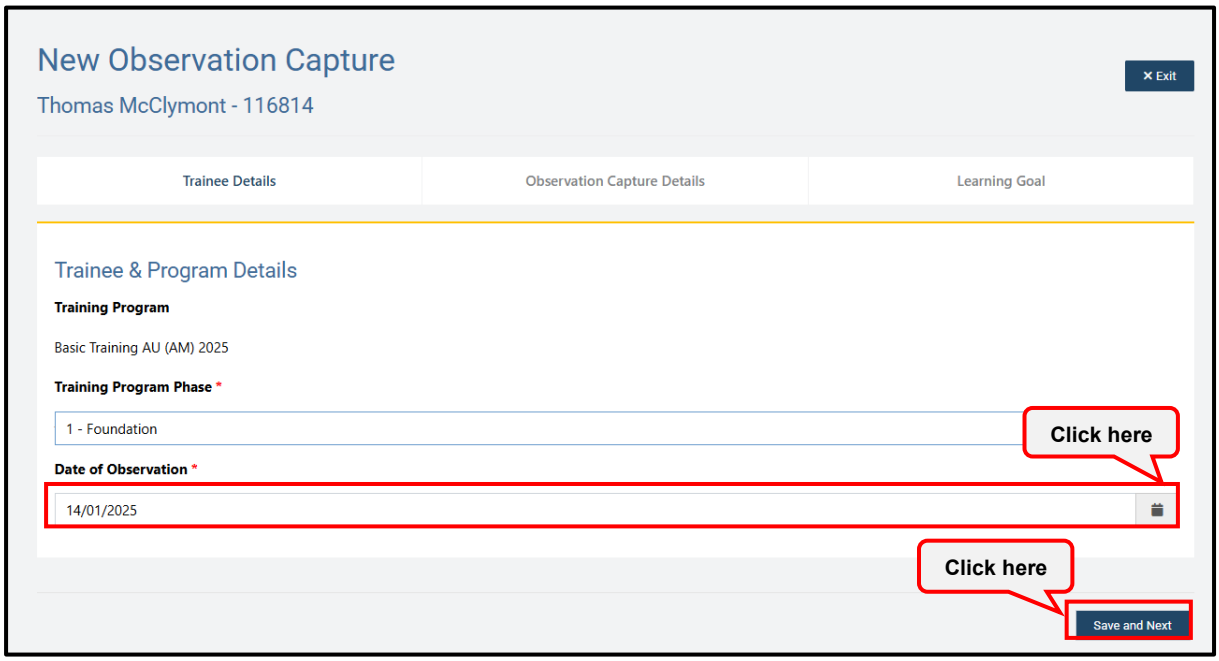

Figure 14

7. In the **Observation Capture Details** section, select the Observation Capture Type from the drop-down list and populate the **Summary of Activity** field. Refer to **Figure 15** for an example.

8. Select the **Complexity** from the drop-down list (High / Medium / Low) as relevant. Refer to **Figure 15**.

9. In the **Primary Learning Goal** field, click on the search icon to look for the learning goals. The learning goal selected will provide you with an assessment against that learning goal, for example, if you select a 'procedures' learning goal, your assessor will be prompted to assess you on that learning goal. Refer to **Figure 15.**

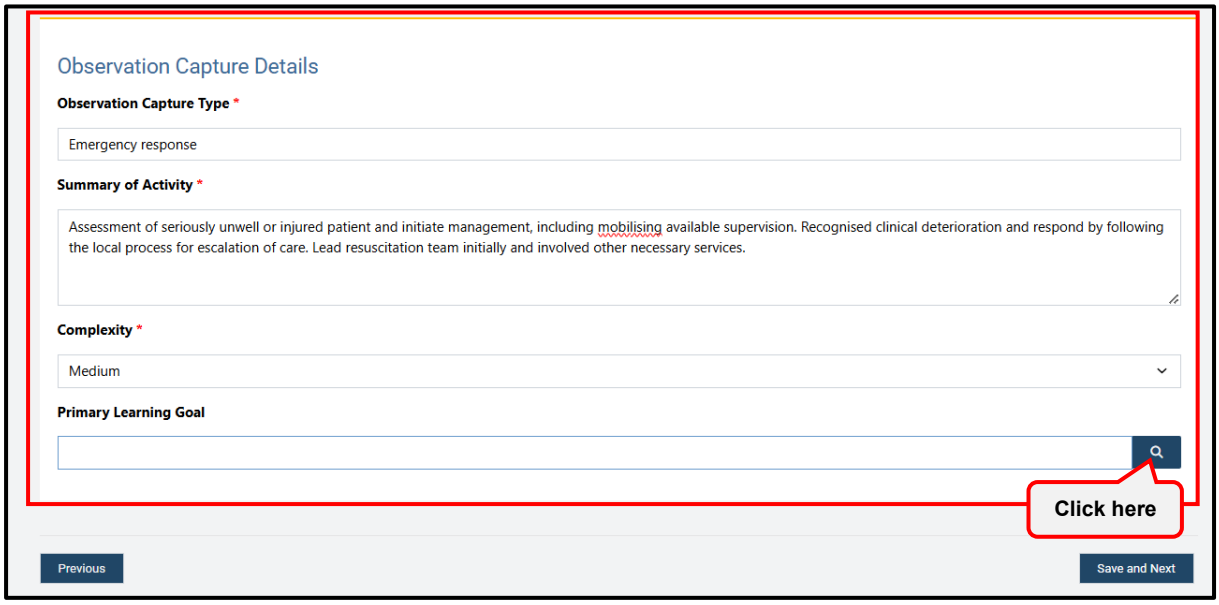

Figure 15

10. Look for the learning goal in the list of records that appears. Select the learning goal by checking the box next to it and click **Select**. Refer to **Figure 16.** Alternatively, you can use the **Search option** at the top right corner to look for the learning goal.

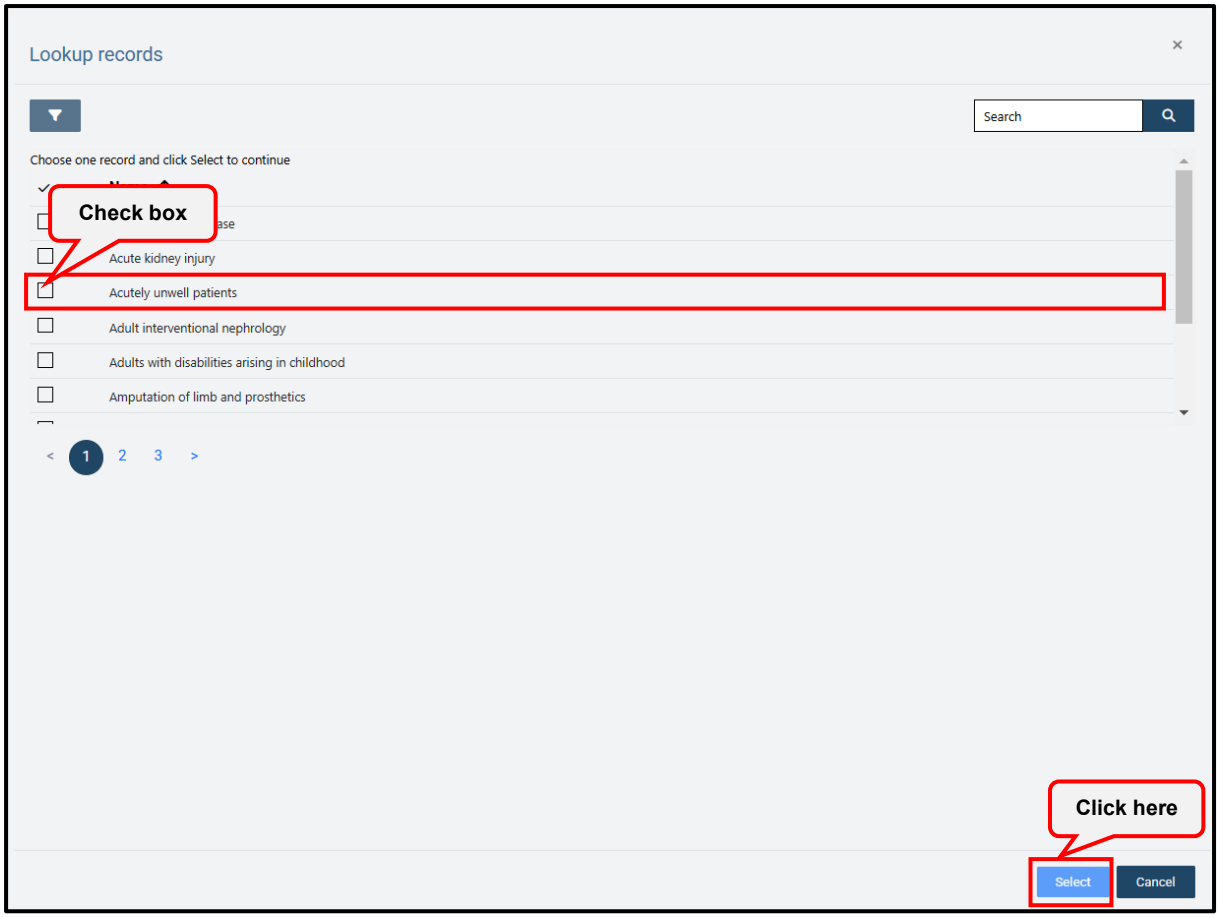

Figure 16

11. Once you return to the **New Observation Capture** page, click **Save and Next**. Refer to **Figure 17**.

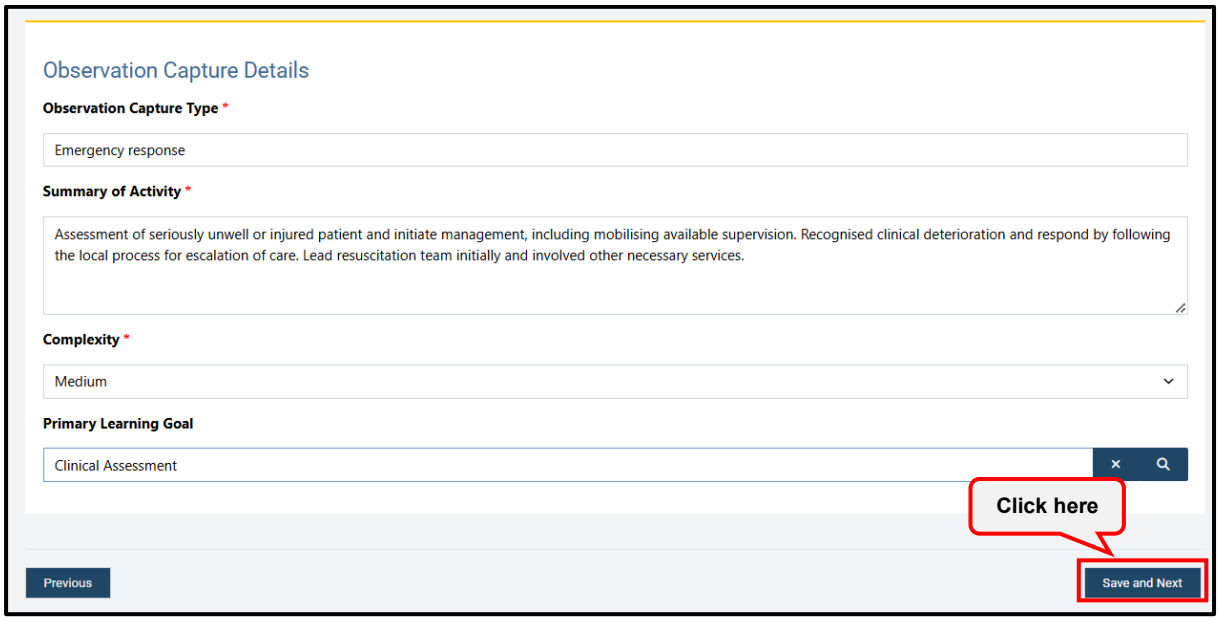

Figure 17

12. The **New Observation Capture** page will appear, with a tick before **Observation Capture Details** indicating the step completion.

13. Under **Learning Goal Components**, check **Yes** and **No** to the learning goal components observed during the Observation Capture. Refer to **Figure 18.**

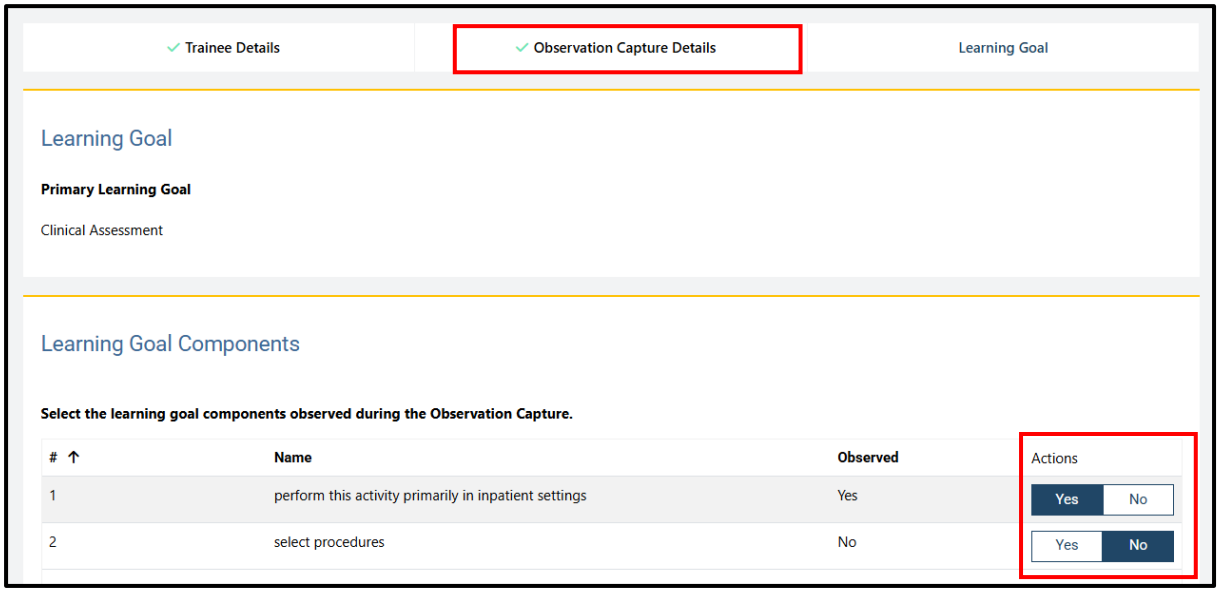

Figure 18

14. Under **Trainee Reflection** and **Assessor Reflection**, the trainee and assessor can provide their feedback respectively. At this time, the trainee can enter feedback that has been dictated to them by the assessor or the assessor can enter their feedback directly using the trainee's device at the time of the observation. This feedback will then be sent to the assessor for validation to ensure they are satisfied with what has been entered. Refer to **Figure 19 and Figure 20**.

Figure 19

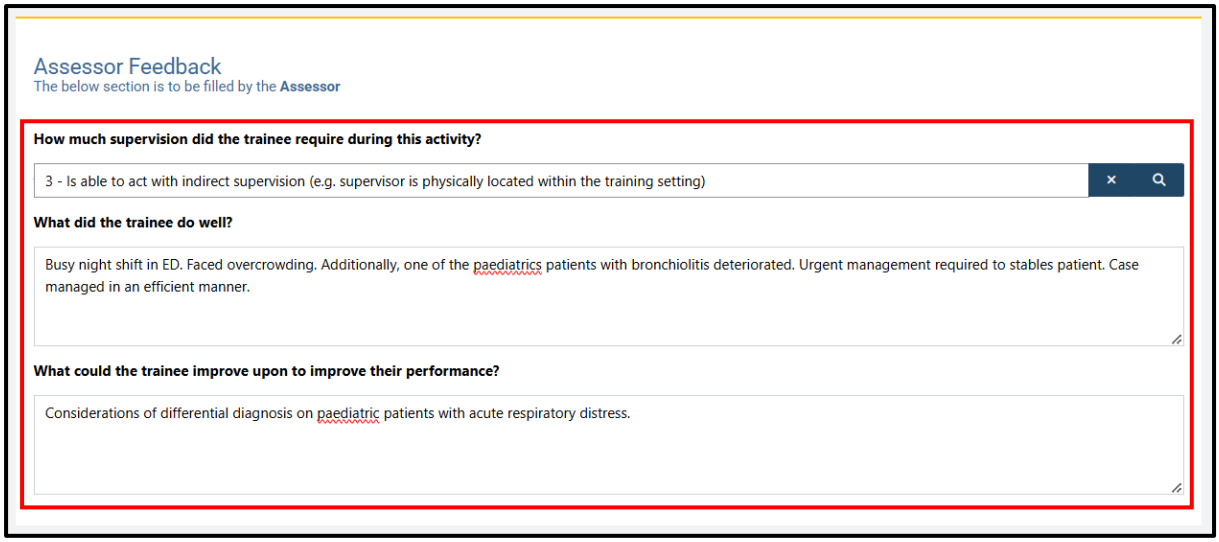

Figure 20

15. As a next step, you need to create a **Feedback request**, for which the steps are covered in the next **Section 2.2: Create Feedback Request.**

Section 2.2: Create Feedback Request

Context: Use these instructions as a trainee to create a feedback request for an Observation capture in the Training Management Platform (TMP) portal.

You can create only one Feedback request for one Observation Capture. You can request feedback from a range of people including their assigned supervisor/s who will have a TMP account, or a non-FRACP consultant, or other colleague/assessor who does not have a TMP account. If the assessor selected does not have a TMP account, you should enter their email details and that will send an online form to the assessor for their review.

1. As an Observation Capture requires a **Feedback request** to be initiated, click on **'+ Add Feedback Request'** button. Refer to **Figure 21**.

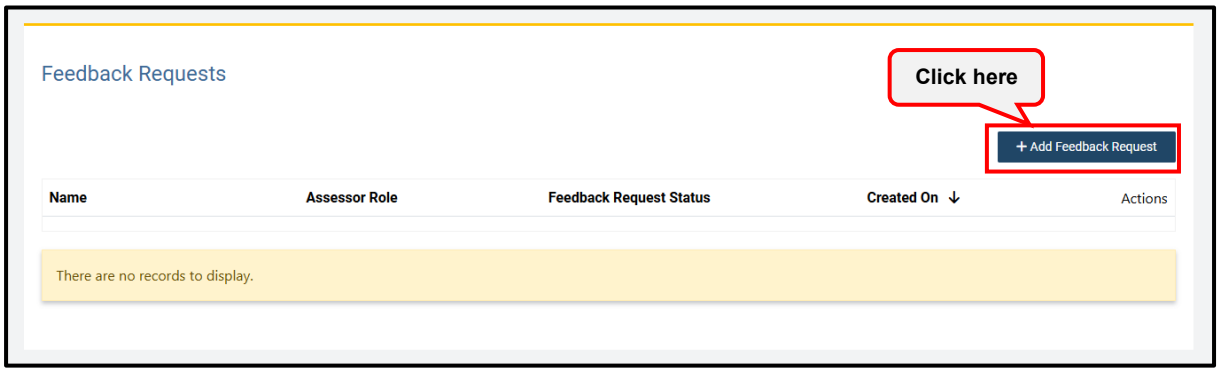

Figure 21

2. **Add Feedback Request** form will appear. Refer to **Figure 22.**

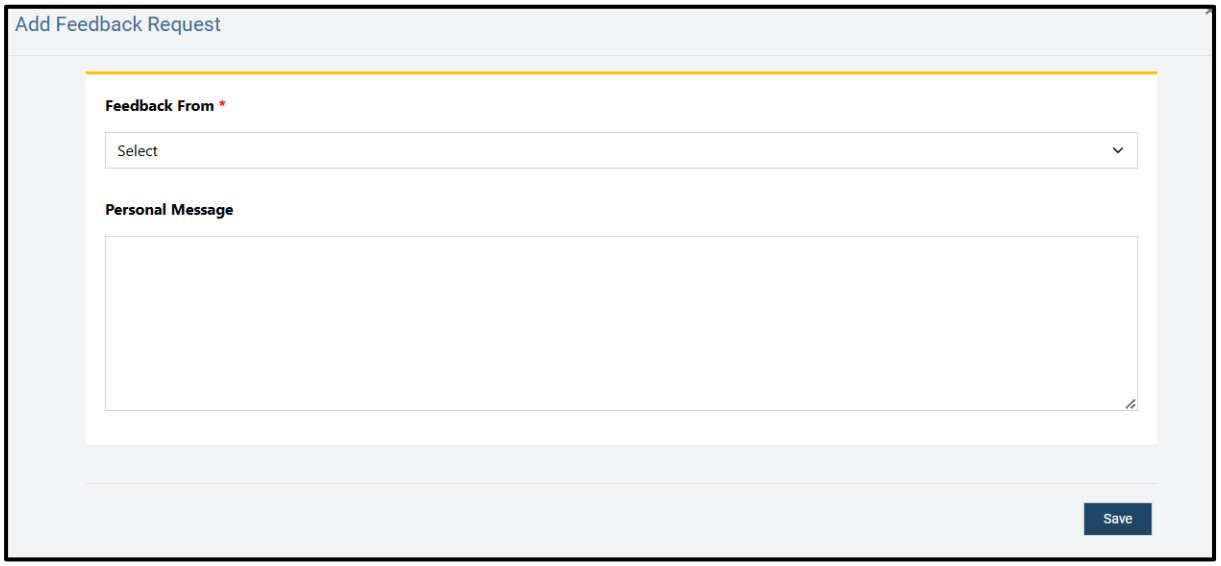

Figure 22

3. In the **Feedback From** field, select the role from the dropdown list consisting of **'DPE'**, **'Education Supervisor'**, **'Rotation Supervisor'** or **'Others'**. Refer to **Figure 23.**
4. Select the **DPE Name** from the drop-down list filtered by DPEs related to your Training Program Setting. Refer to **Figure 23**.
5. Populate the **Assessor role** as **'DPE'** and enter a personal message if required. Click **Save**. Refer to **Figure 23.**

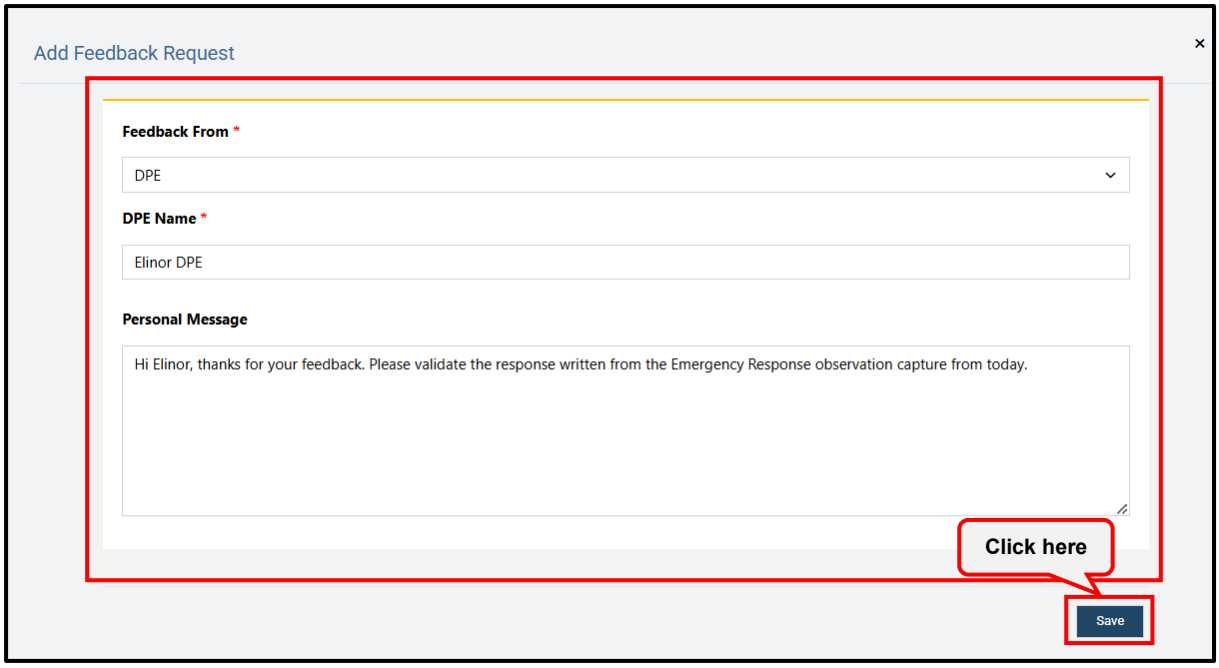

Figure 183

6. Alternatively, if you select **Education Supervisor**, populate the **Education Supervisor Name** by selecting from the dropdown list filtered by **Education Supervisors** named against your Training Program.
7. Alternatively, if you select **Others**, populate the **Name** and **Email** field (mandatory) and the fill in the **Assessor Role** and **Personal Message** (optional). This option allows you to select assessors who are not involved as a supervisor in RACP training programs, this could include a nurse or clinician who is not your direct supervisor or DPE. These assessors will not have a TMP account and will be emailed a link to an online form to complete.
8. Alternatively, if you select **Rotation Supervisor**, populate the **Rotation Supervisor Name** by selecting from the dropdown list filtered by **Rotation Supervisors** named against your Rotation Plans for your Training Program. Refer to **Figure 24**.

Note: *Based on the role you select in **Feedback from** field, populate the **Name**, **Role** and **Personal message** fields accordingly.*

*For example, if you select **'DPE'** from the **Feedback from** drop-down list, select the **DPE Name** from the drop-down list of **DPEs** (this list is filtered by DPEs related to your Training Program Setting), populate the **Assessor Role** to **'DPE'** and enter personal message for the DPE to provide feedback.*

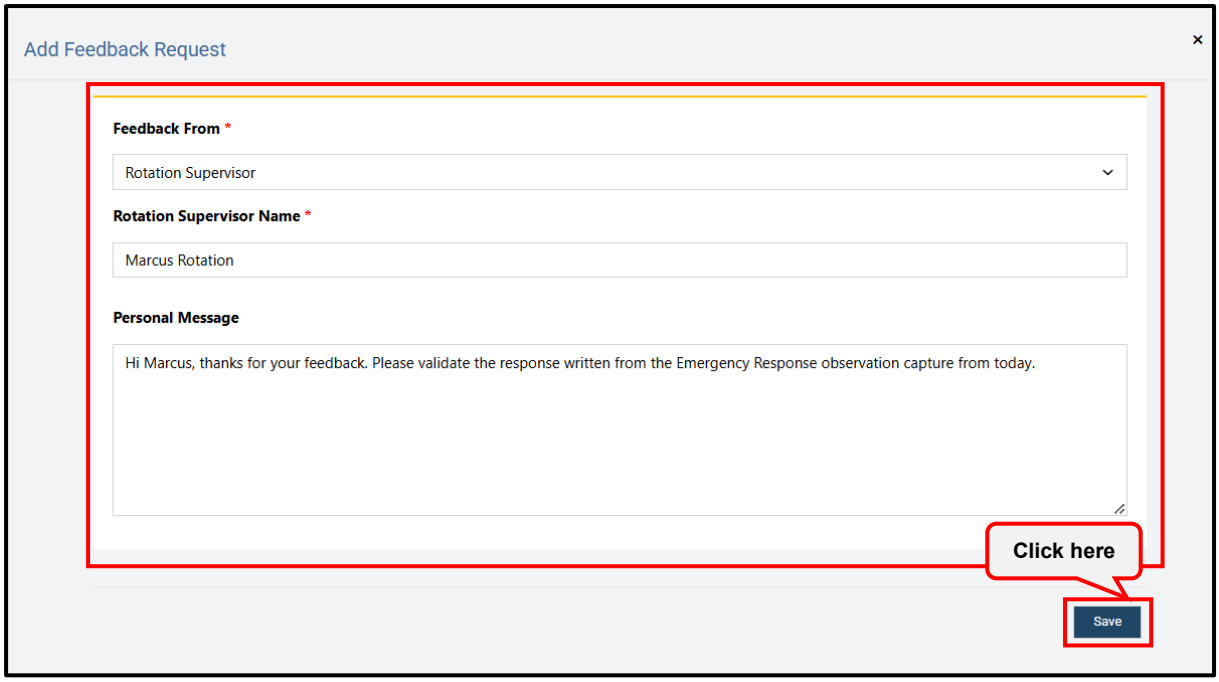

Figure 24

9. Once you click **Save** after nominating an assessor to provide you with feedback, this request will appear in Draft on the **Feedback Requests** page. Refer to **Figure 25**.

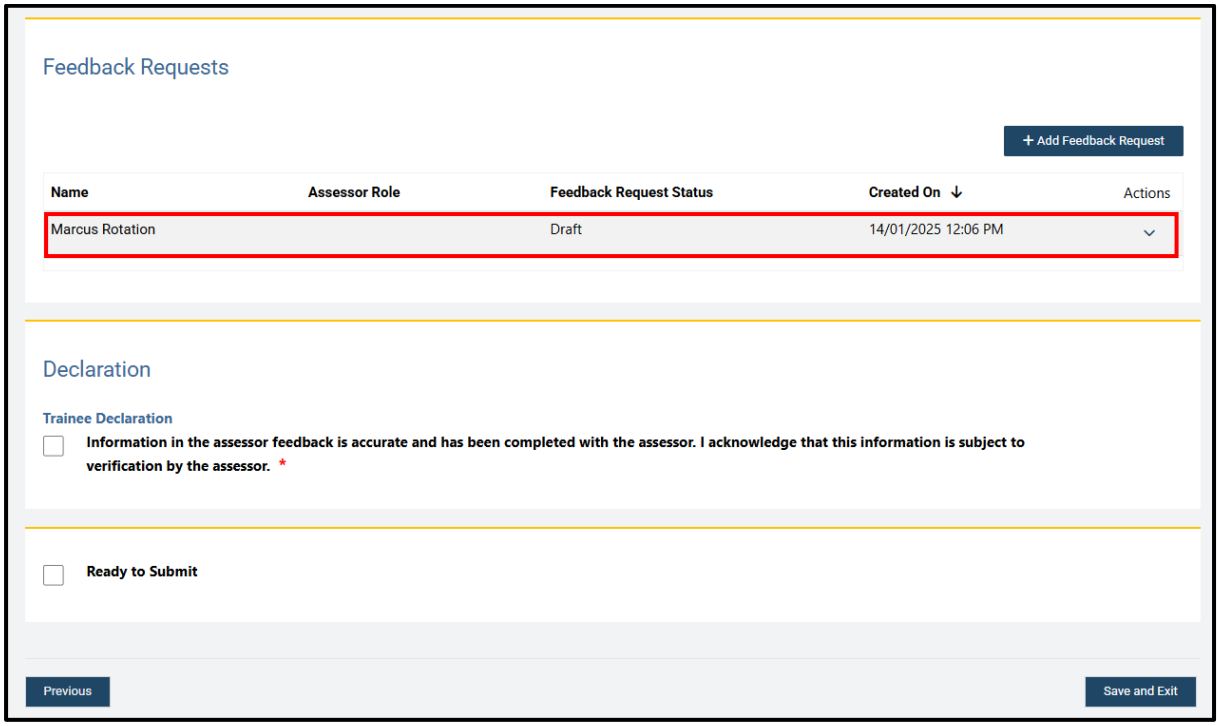

Figure 25

10. If you wish to cancel the **Feedback Request** you have just created, whilst it is still in draft, click on the downward arrow under **Actions** and click on **Cancel Feedback Request.** Refer to **Figure 26**.

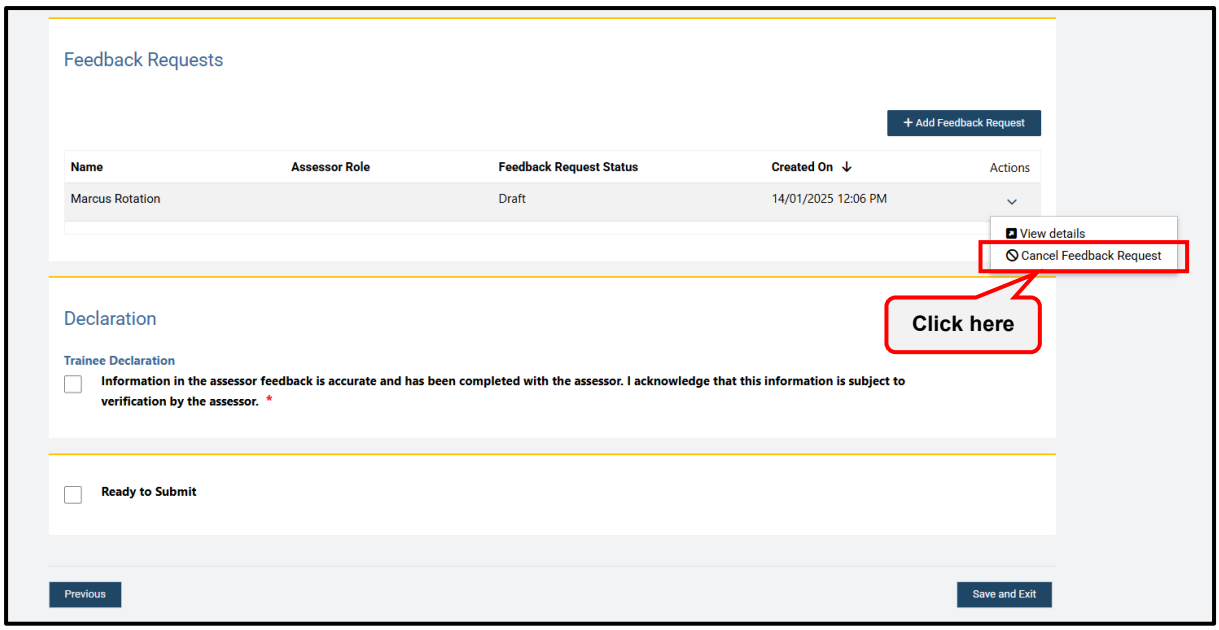

Figure 26

11. To complete your **Observation Capture** and initiate the Feedback request approval to your Assessor, check the boxes under **Declarations** and click on the **Submit** button. Refer to **Figure 27**.

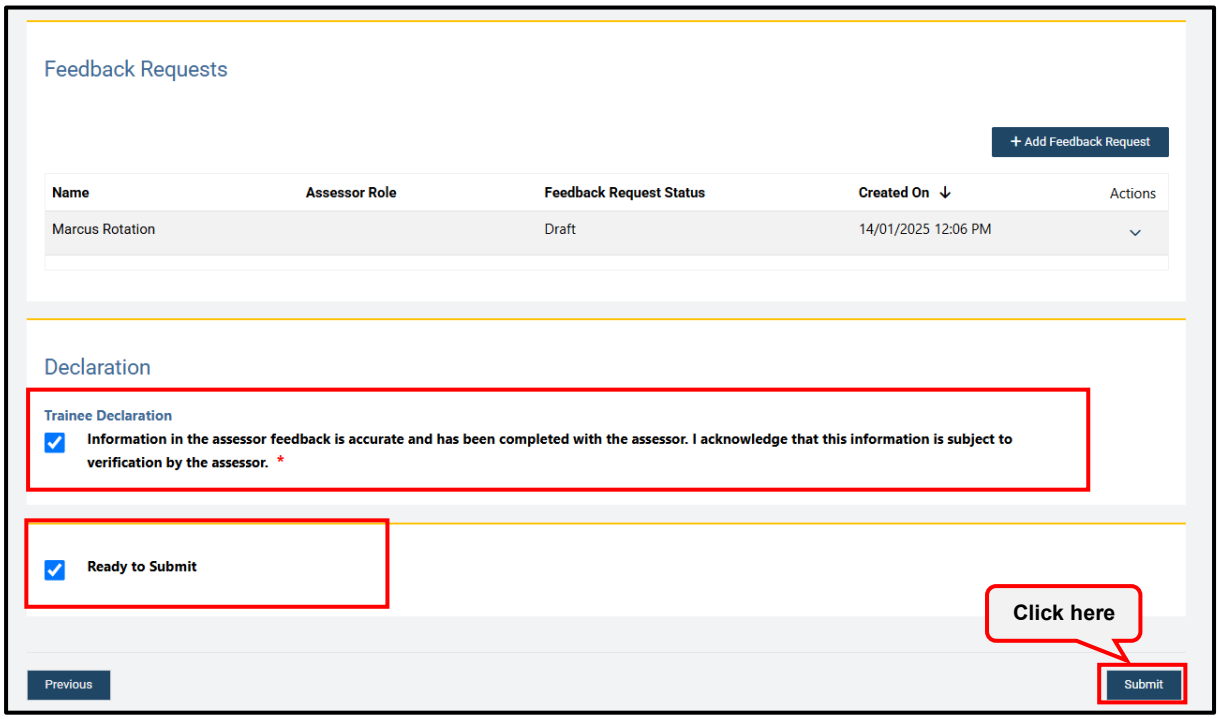

Figure 19

12. The system will show a confirmation message on the screen saying, **'Action completed successfully'**. Refer to **Figure 28**.

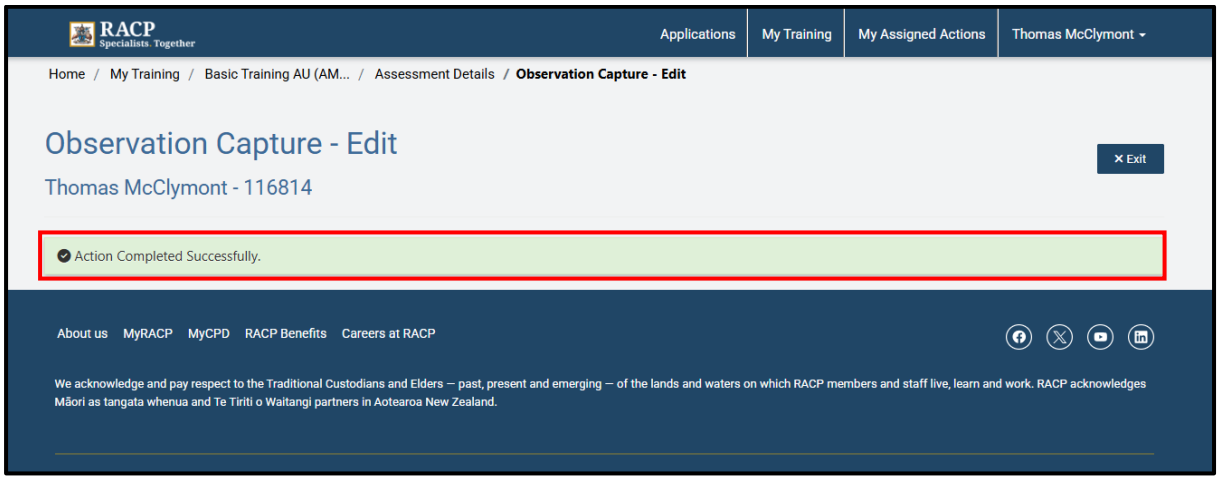

Figure 28

13. Your **Feedback request** will now be sent to your **Assessor for Review**, where they can decline or approve the request. The status will now show as **'Invited'**. Refer to **Figure 29.**

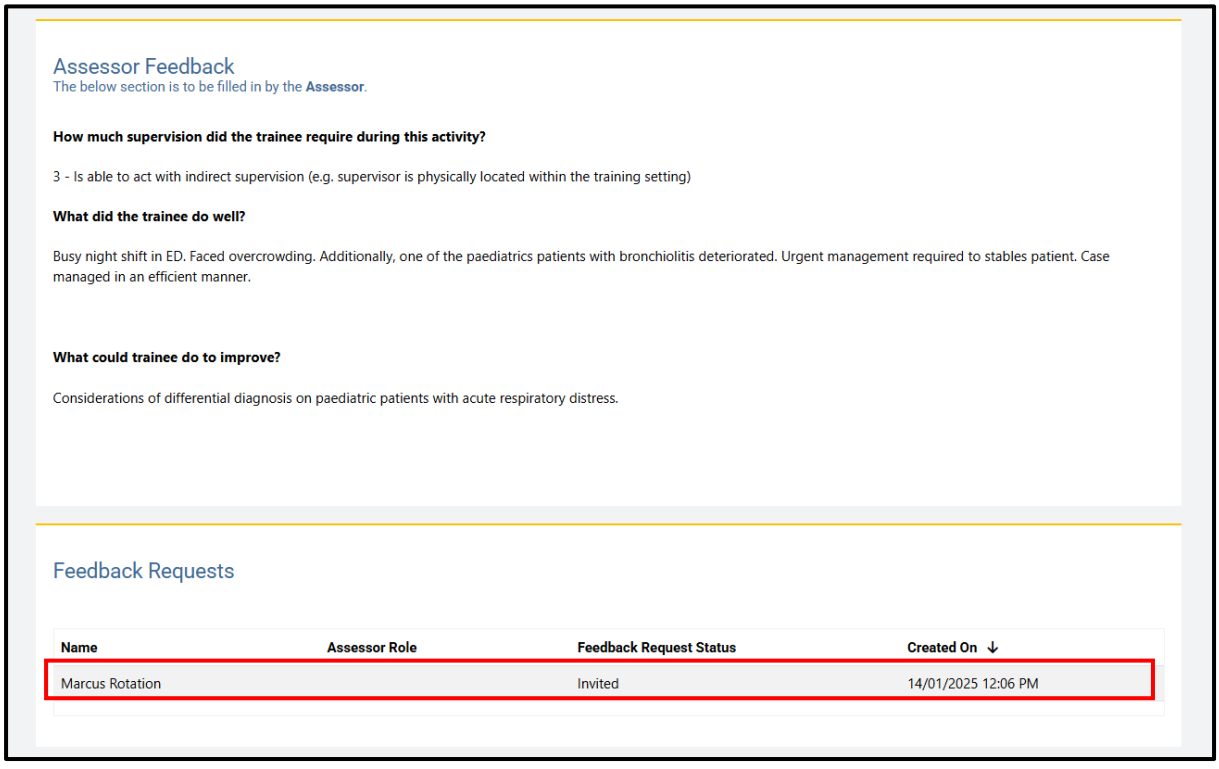

Figure 209

Section 2.3: View Observation Captures and Monitor Feedback Request

Context: Use these instructions as a trainee to view the submitted Observation Captures and monitor their status in the Training Management Platform (TMP) portal. Your observation captures can be viewed in My Training page via multiple ways as covered in subsequent steps. An Observation Capture can be at the following status visible to both Trainees and Supervisors:

- **Draft**: The Observation Capture is in draft with the party who created it (either Trainee or Supervisor).
- **Submitted to Assessor for Review**: The Observation Capture has been sent to the assessor (which may be an Unrelated Assessor, patient, nurse, or Supervisor) for review.
- **Completed – Pending Reflection:** The Observation Capture has been initiated by the Assessor and has been sent to the trainee for their reflection.
- **Completed:** The assessor and trainee have provided their reflection on the Observation Capture, verified the information and submitted the Observation Capture.
- **Cancelled**: The assessor or trainee has cancelled the Observation Capture.
- **Assessor request declined**: The assessor has declined the invitation to provide feedback on the Observation Capture.

My Training via Assessment Requirements Due Next

1. Navigate to **Landing page** > **My Training** in the Navigation menu > **My Training** page. Refer to **Figure 30**.

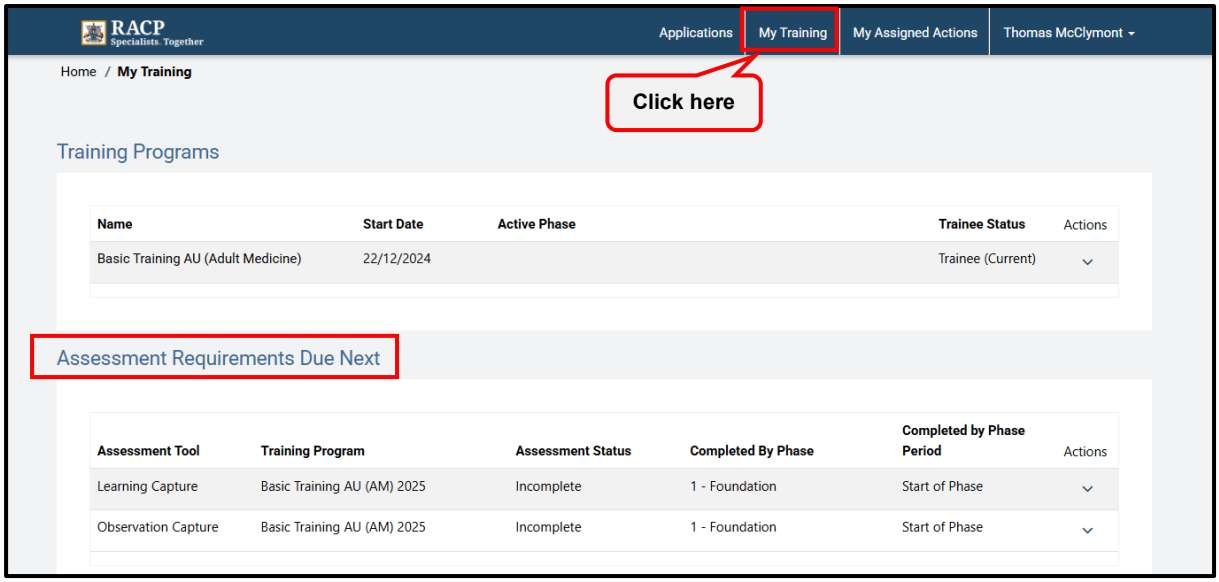

Figure 30

2. Scroll down to **Assessment Requirements Due Next** section. For the Observation Capture you want to open, click on downward arrow under **Actions** and select **Add/Edit**. Refer to **Figure 31**.

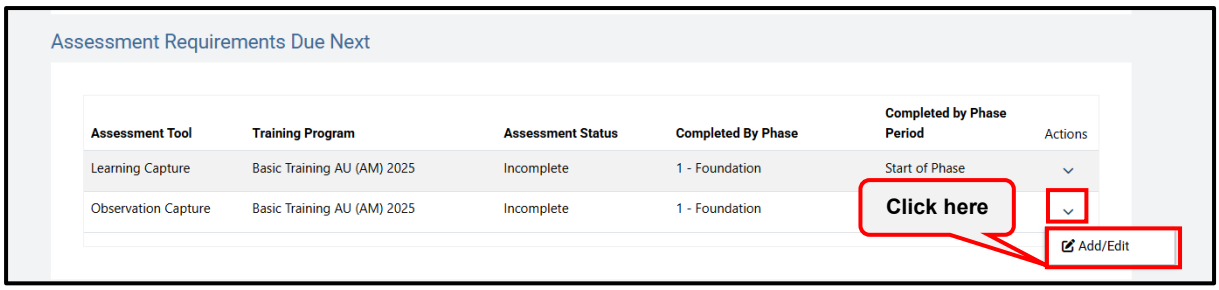

Figure 31

3. On the **Assessment Requirements Details** page, scroll down to the **Observation Captures** section and click on the hyperlinked text under **Title**. Refer to **Figure 32.**

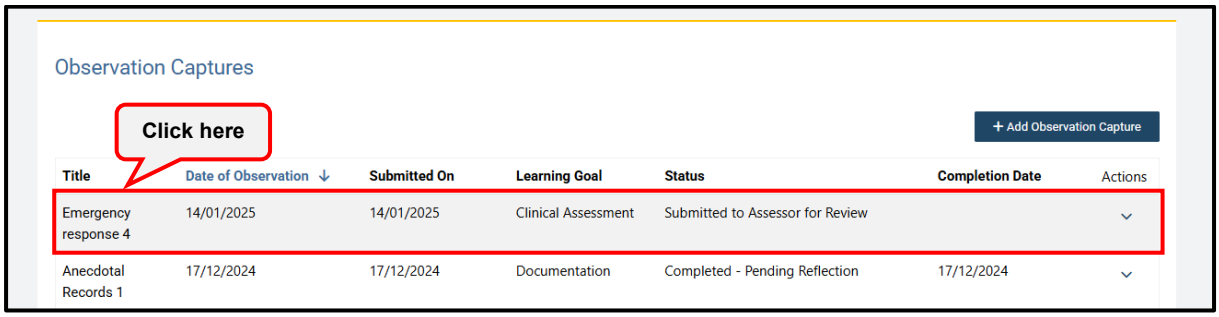

Figure 212

> ***Note:*** *You will be able to see your Observation Captures with different statuses. For example:* ***'Draft'***, ***'Submitted to Assessor for Review'***, ***'Completed – Pending Reflection'***, ***'Completed'***, ***'Cancelled'*** *and* ***'Assessor declined request'****.*

4. Alternatively, you can also click on the downward arrow under **Actions** and select **View Details** to open the Observation Capture. Refer to **Figure 33.**

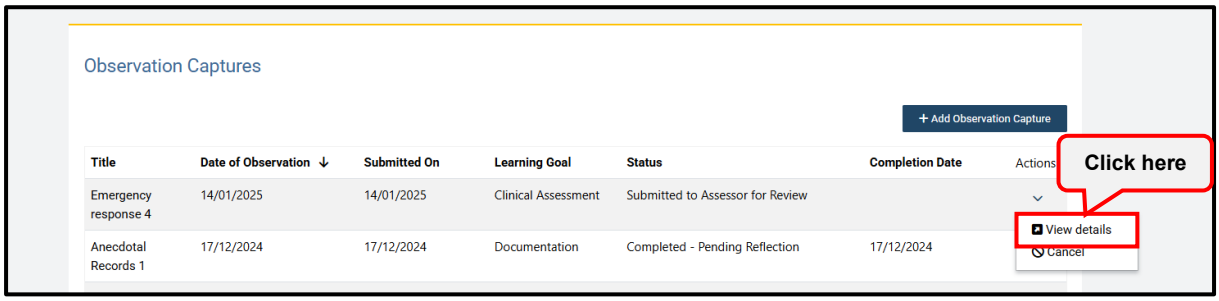

Figure 223

5. The **Observation Capture details** page will appear. Refer to **Figure 34.**

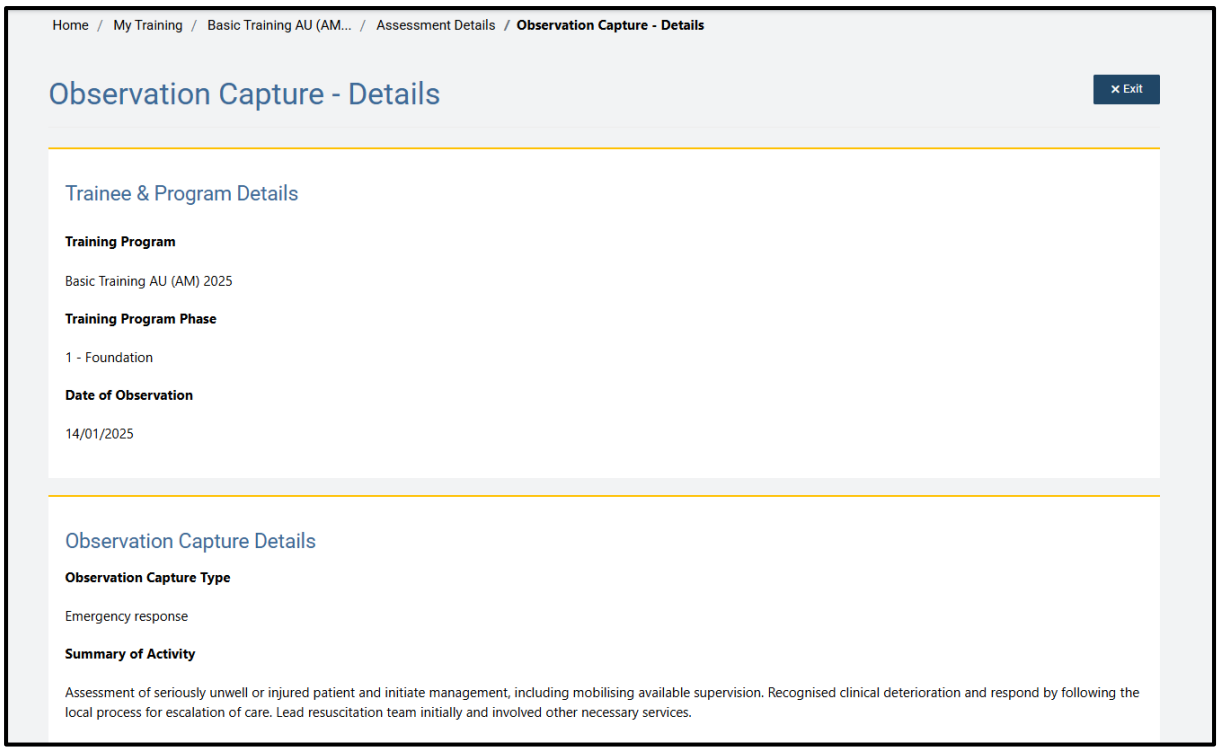

Figure 234

Via your Training program under Training Programs section

1. Navigate to **Landing page** > **My Training** in the Navigation menu > **My Training** page. Refer to **Figure 35.**

2. Click on your Training Program to open it (under **Training Programs** section). Refer to **Figure 35.**

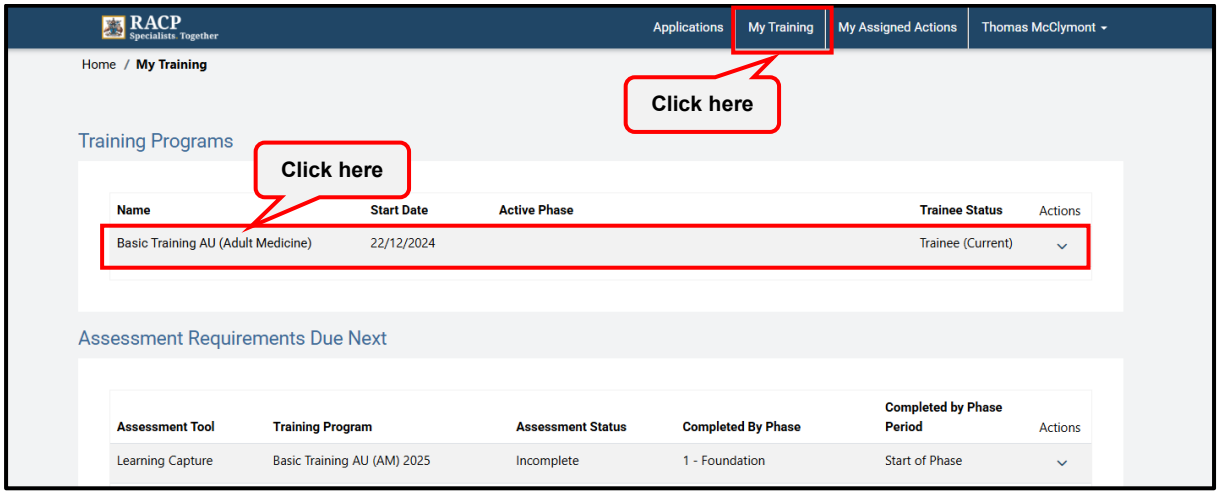

Figure 35

3. Navigate to the **Assessment Requirements tab** > **Phase Requirements** section. Refer to **Figure 36.**

4. Click on the assessment requirement that shows **'Observation Capture'** under the **Assessment Tool** column in the grid. Refer to **Figure 36.**

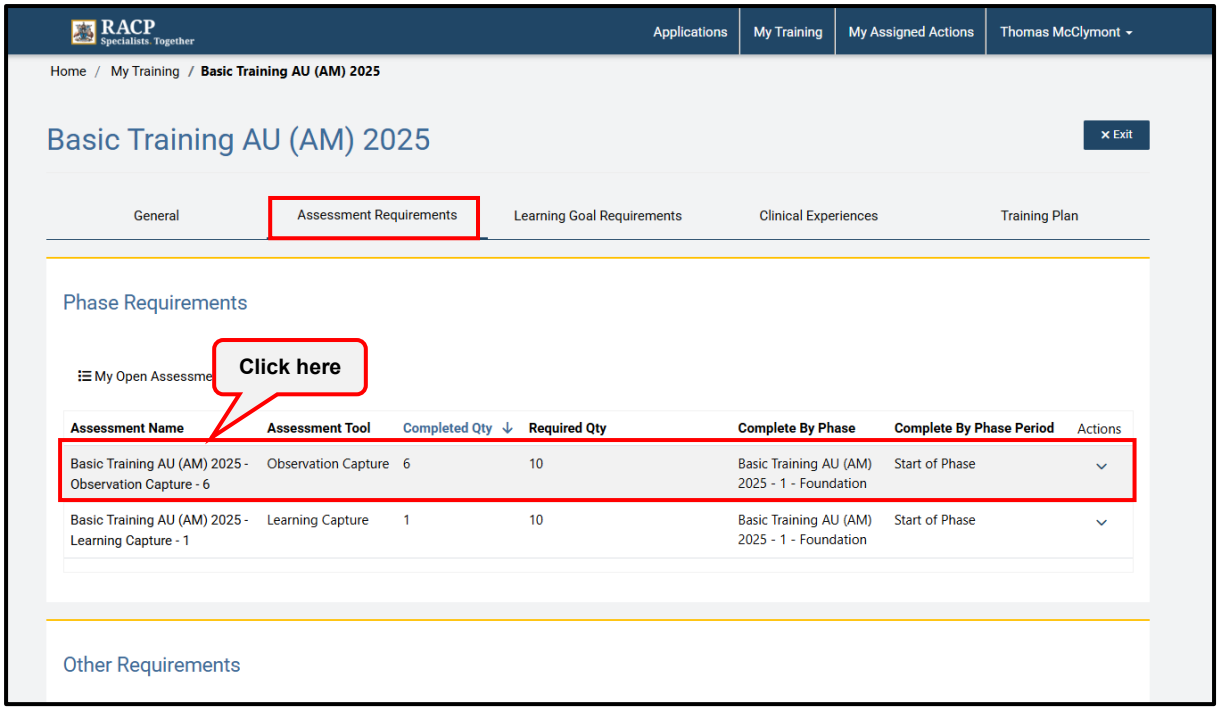

Figure 246

5. On the **Assessment Details** page, scroll down to the **Observation Captures** section and click on the hyperlinked text under **Title**. Refer to **Figure 37.**

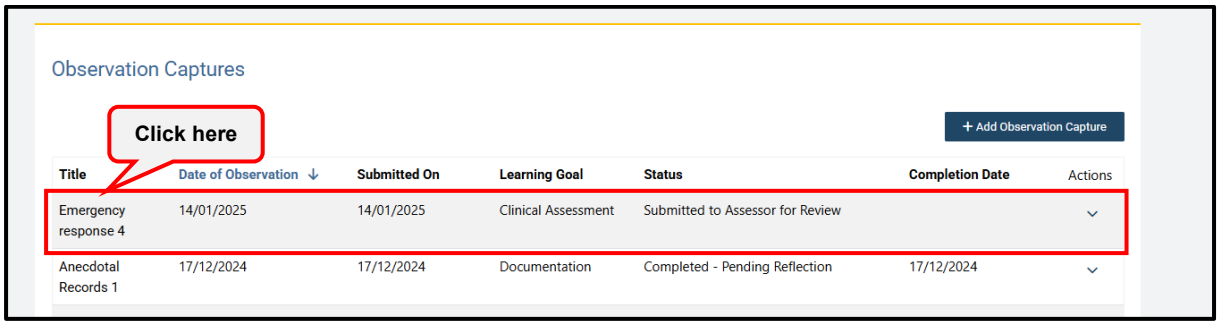

Figure 37

6. Alternatively, you can also click on the downward arrow under **Actions** and select **View Details** to open the Observation Capture. Refer to **Figure 38.**

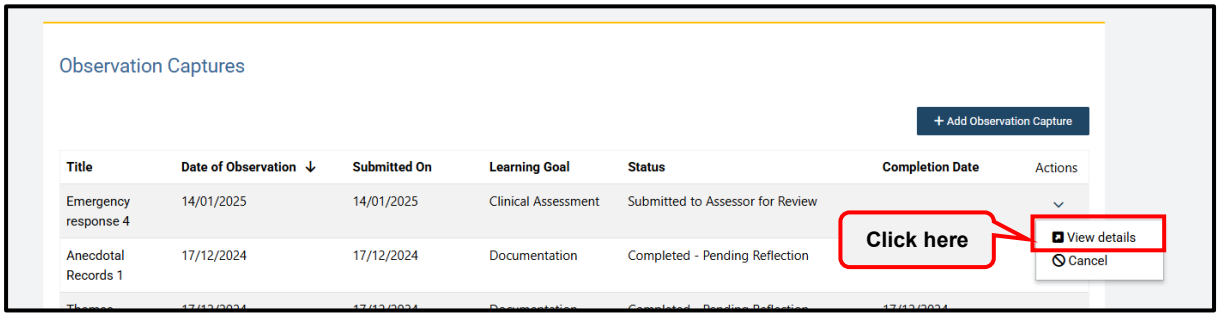

Figure 38

7. The **Observation Capture details** page will appear. Refer to **Figure 39.**

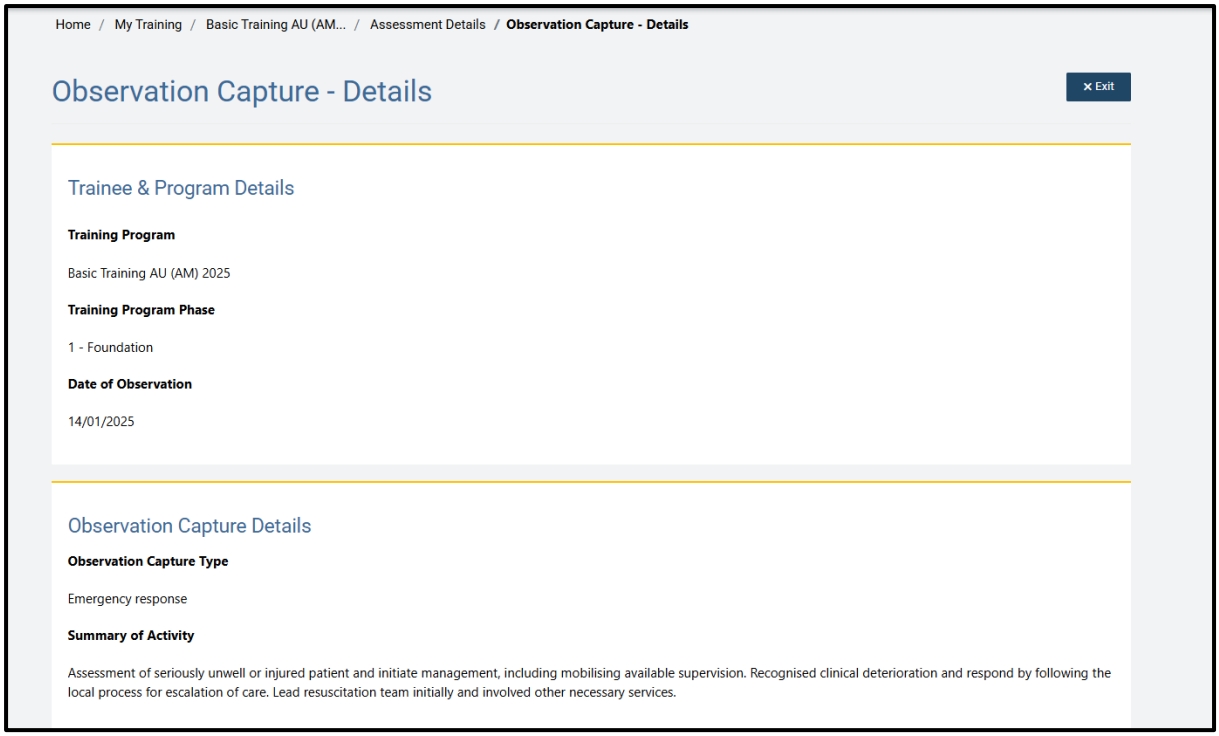

Figure 39

8. On the **Observation Capture details** page, scroll down to view the feedback fields from an assessor that have been completed. Scroll down further to the **Feedback Requests** section to view the **Feedback Request Status**. Refer to **Figure 40**.

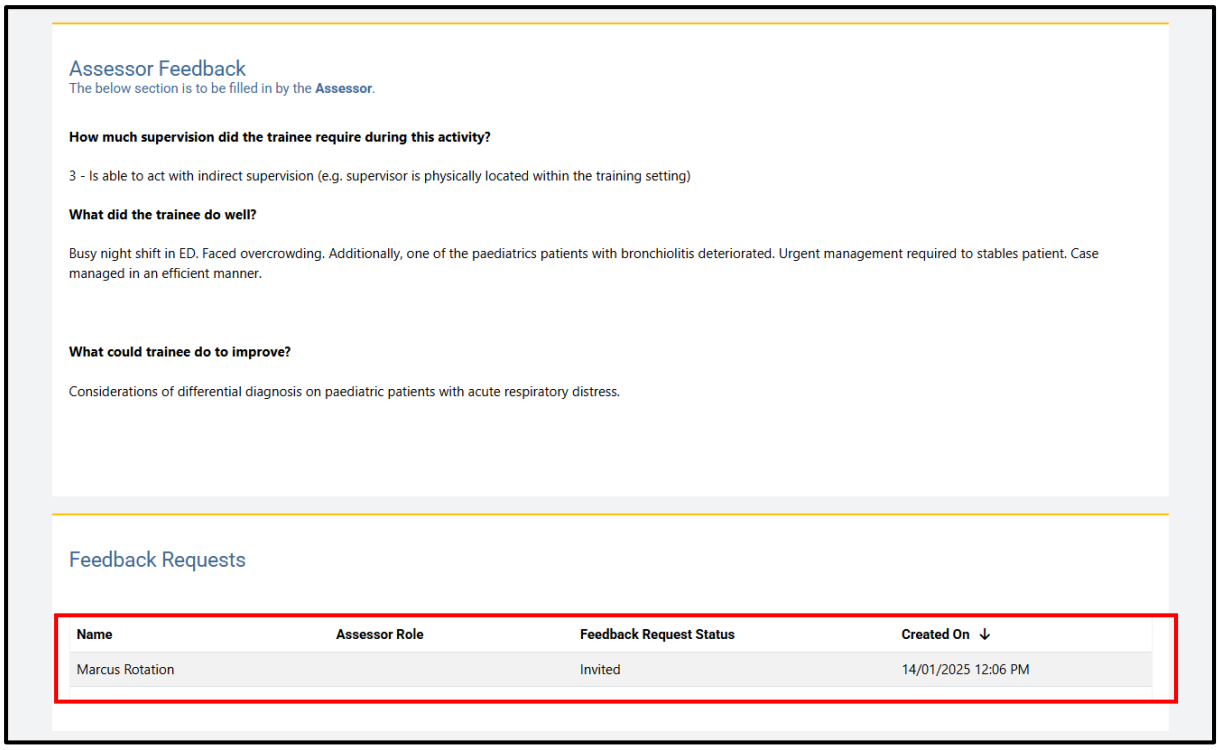

Figure 40

Section 2.4: Submit a reflection for your Observation Capture

Context: Use these instructions as a trainee to submit a reflection for your Observation Capture in the Training Management Platform (TMP) portal.

The Observation Capture will be considered closed once you have completed your reflection.

Navigation option 1 via My Assigned Actions

1. Navigate to **Landing page** > **My Assigned Actions** in the Navigation Menu. Refer to **Figure 41.**

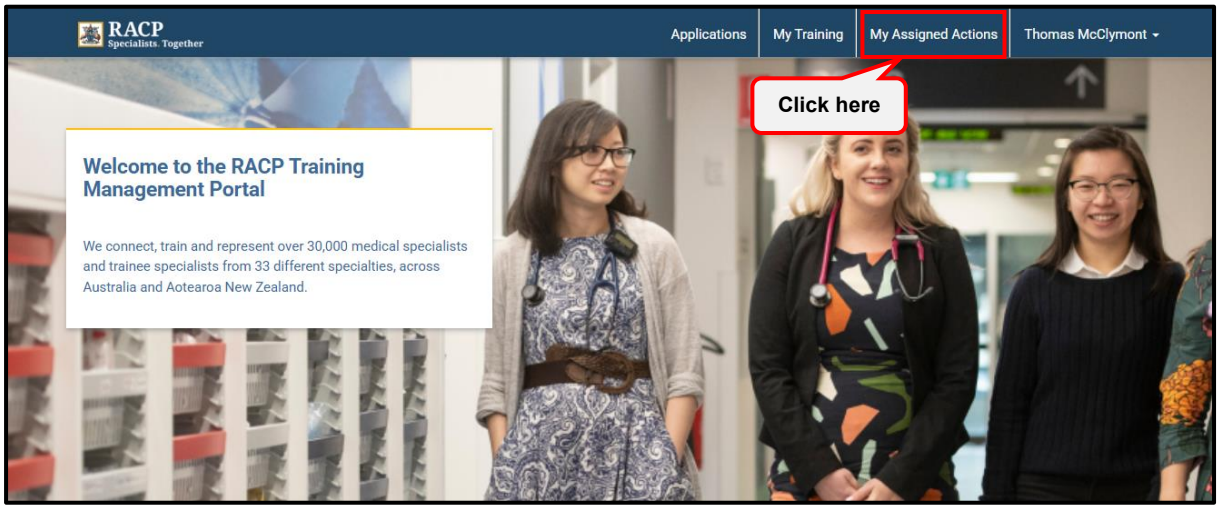

Figure 41

2. Click on the **Observation Capture** tab, to view **Observation Capture – Submitted for Reflection** section. The Observation captures that require your reflection are listed here. Refer to **Figure 42**.

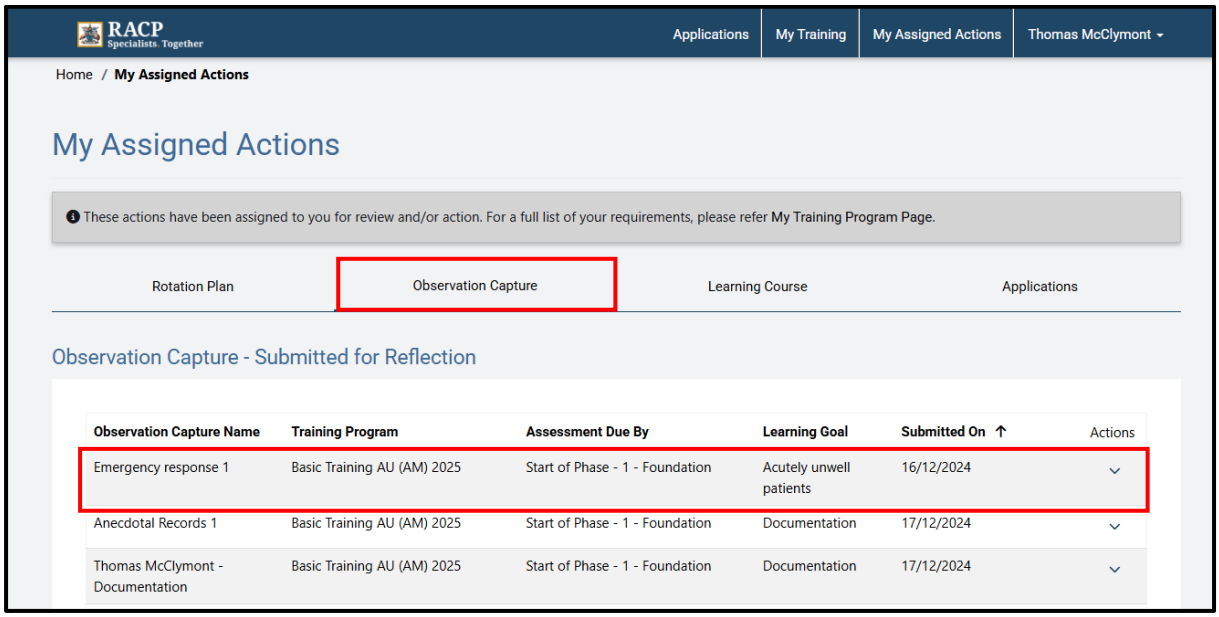

Figure 42

3. Click on the downward arrow under **Actions** and select **Submit Reflection**. Refer to **Figure 43.**

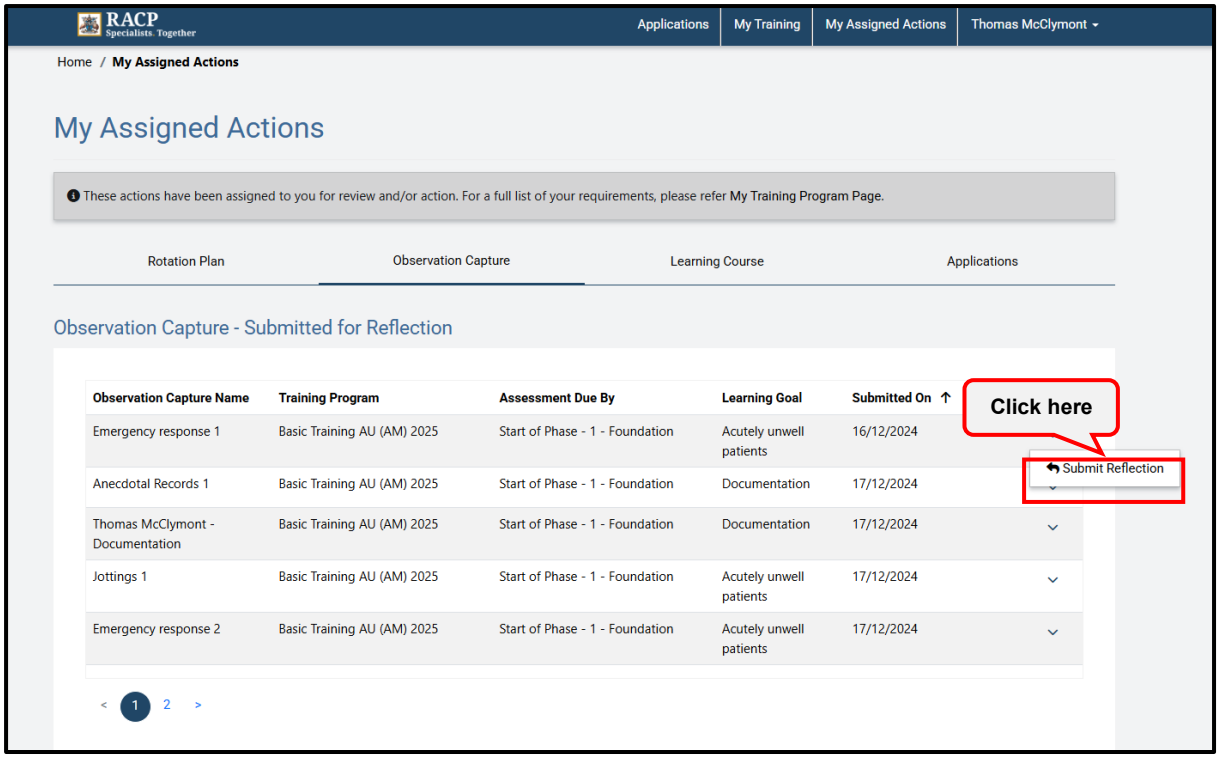

Figure 253

4. Review the details of your Observation Capture and scroll down to the **Trainee's Reflection** section. In this reflection you should consider the situation/encounter that was observed and the feedback you received from your assessor. Populate the mandatory fields (*). Refer to **Figure 44**.

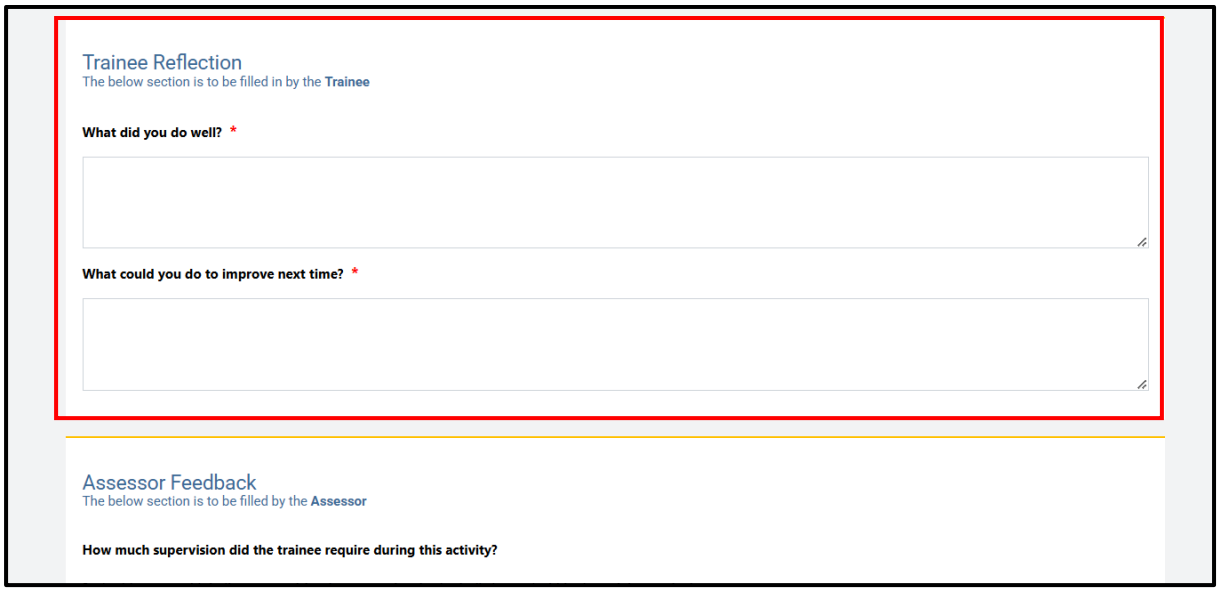

Figure 44

5. Scroll down and click **Submit**. Refer to **Figure 45.**

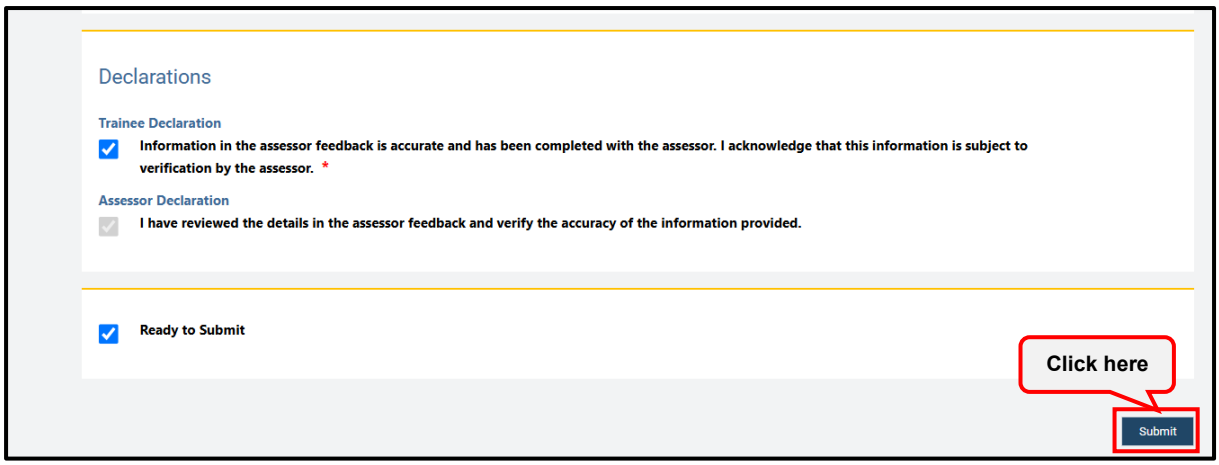

Figure 265

6. You will receive a system message indicating your Observation Capture is now complete.

Navigation option 2 via Assessment Requirements

1. Navigate to **Landing page** > **My Training > Training Programs** section and click on your Training Program record. Refer to **Figure 46.**

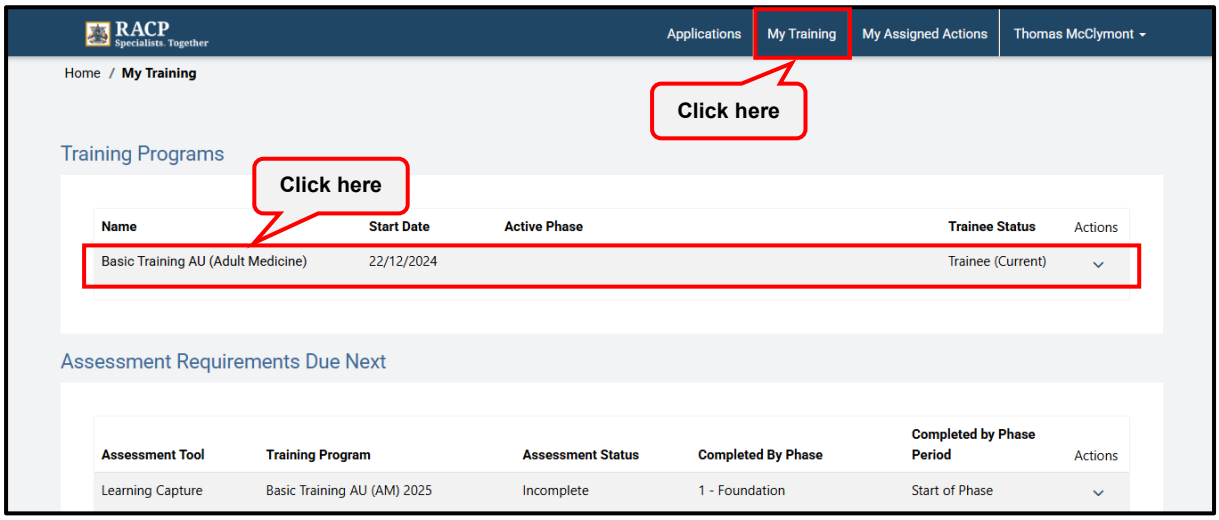

Figure 276

2. Navigate to the **Assessment Requirements tab** > **Phase Requirements** section and click to open the record that shows **'Observation Capture'** under the **Assessment Tool** column in the grid. Refer to **Figure 47.**

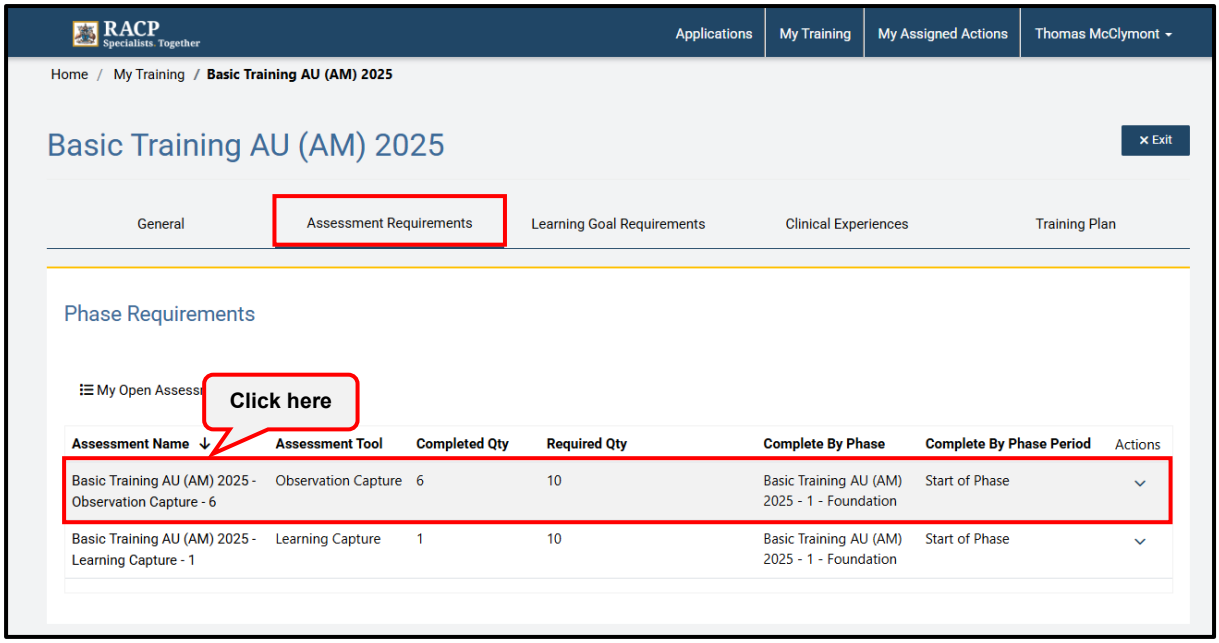

Figure 287

3. The **Observation Capture details** page will appear. Scroll down to **My Observation Captures** and observe that your Observation Capture Status shows as **'Completed – Pending Reflection'**. Refer to **Figure 48.**

4. Click on the Observation Capture **Title** (hyperlink) to open it. Refer to **Figure 48**.

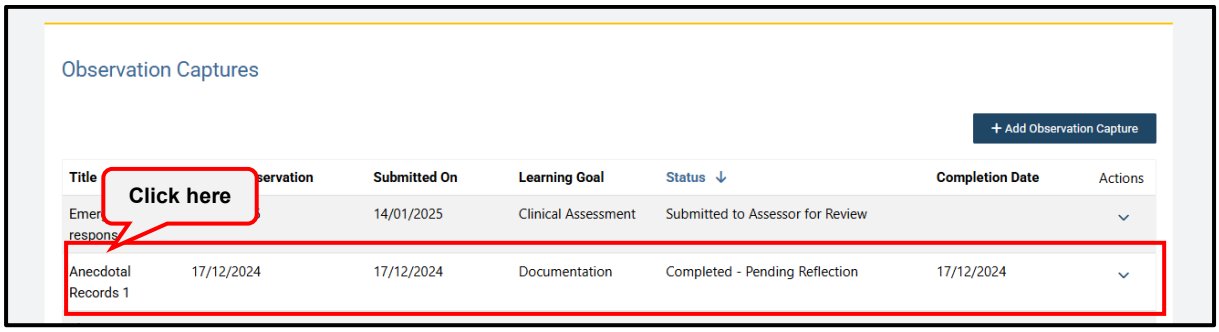

Figure 48

5. Alternatively, you can also click on the downward arrow under **Actions** and select **Edit.** Refer to **Figure 49.**

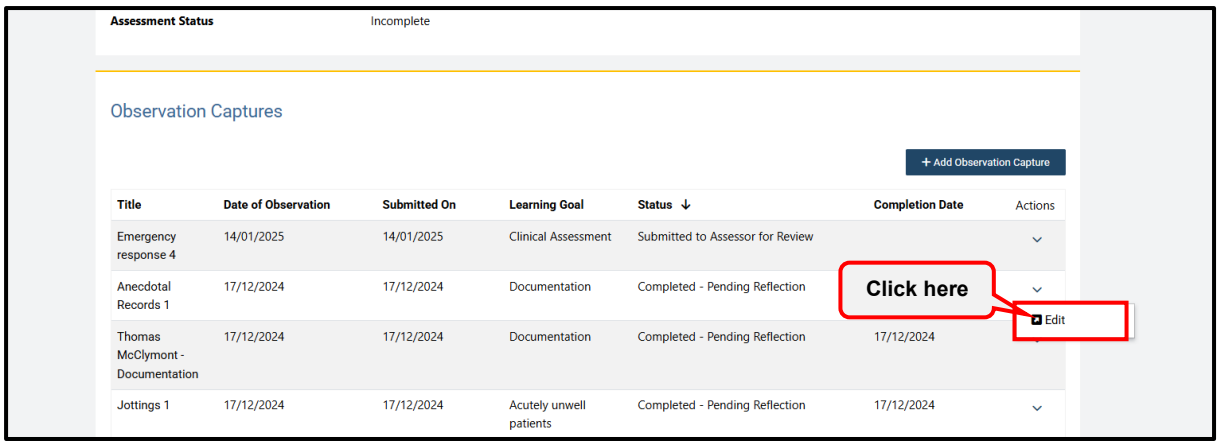

Figure 299

6. On the **Observation Capture – Edit** page, scroll down to the **Trainee's Reflection** section. In this reflection you should consider the situation/encounter that was observed and the feedback you received from your assessor. Populate the mandatory (*) fields. Refer to **Figure 50**.

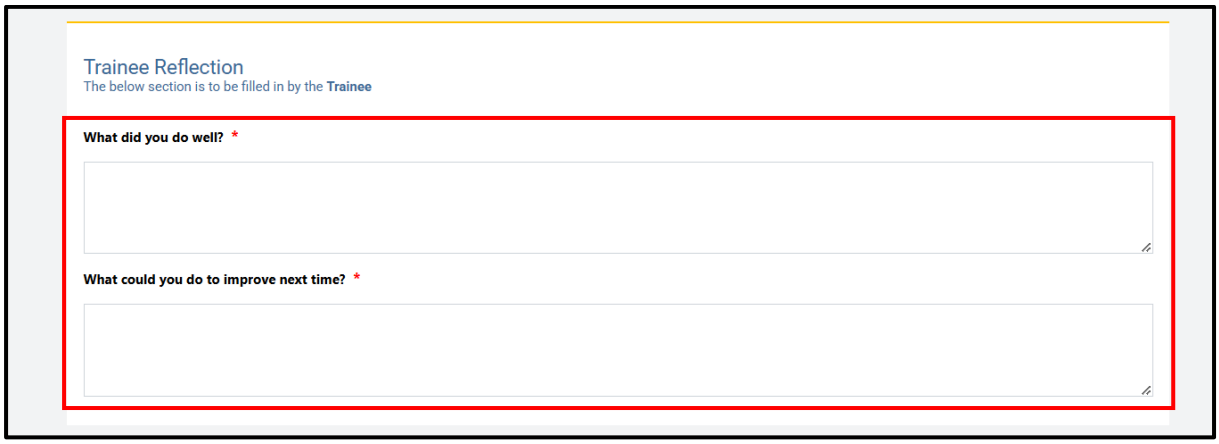

Figure 50

7. Scroll down and click **Submit**. Refer to **Figure 51**.

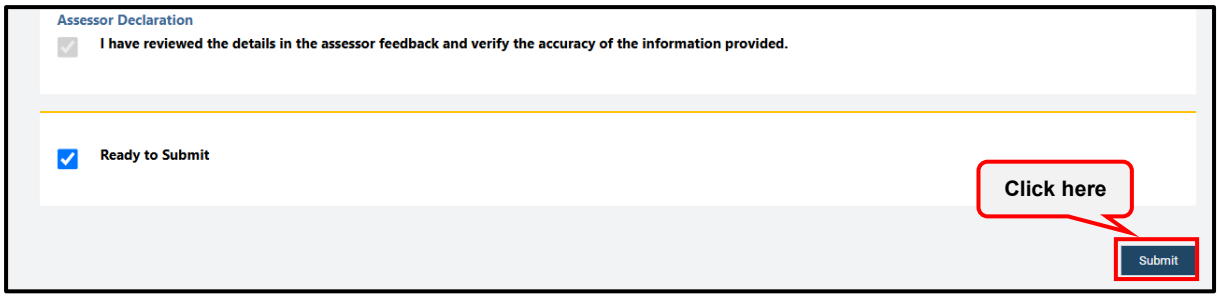

Figure 51

8. You will receive a system message indicating your Observation Capture is now complete.

Note: *Once you complete an Observation Capture, it will contribute to your **'Completed Qty'** count against your **Assessment Requirements** record.*

*Your Observation Capture requirements will not be fully completed until you complete the **'Required Qty'** against your Assessment Requirement record.*

Section 2.5: Cancel Observation Capture

Context: Use these instructions as a trainee in circumstances where you wish to cancel your submitted Observation Capture in the Training Management Platform (TMP) portal.

1. Navigate to **Landing page** > **My Training > Training Programs** section and click on your Training Program record. Refer to **Figure 52.**

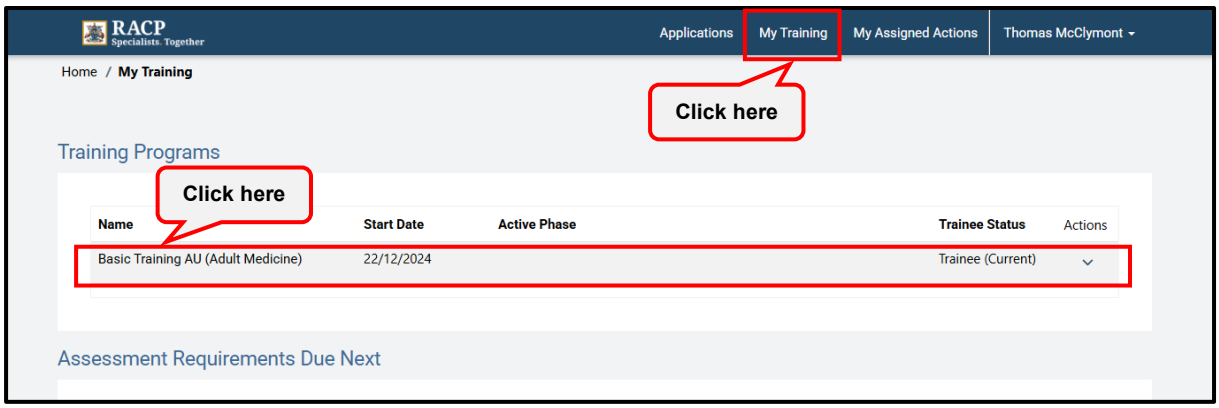

Figure 52

2. Navigate to the **Assessment Requirements tab** > **Phase Requirements** section and click to open the record that shows **'Observation Capture'** under the **Assessment Tool** column in the grid. Refer to **Figure 53.**

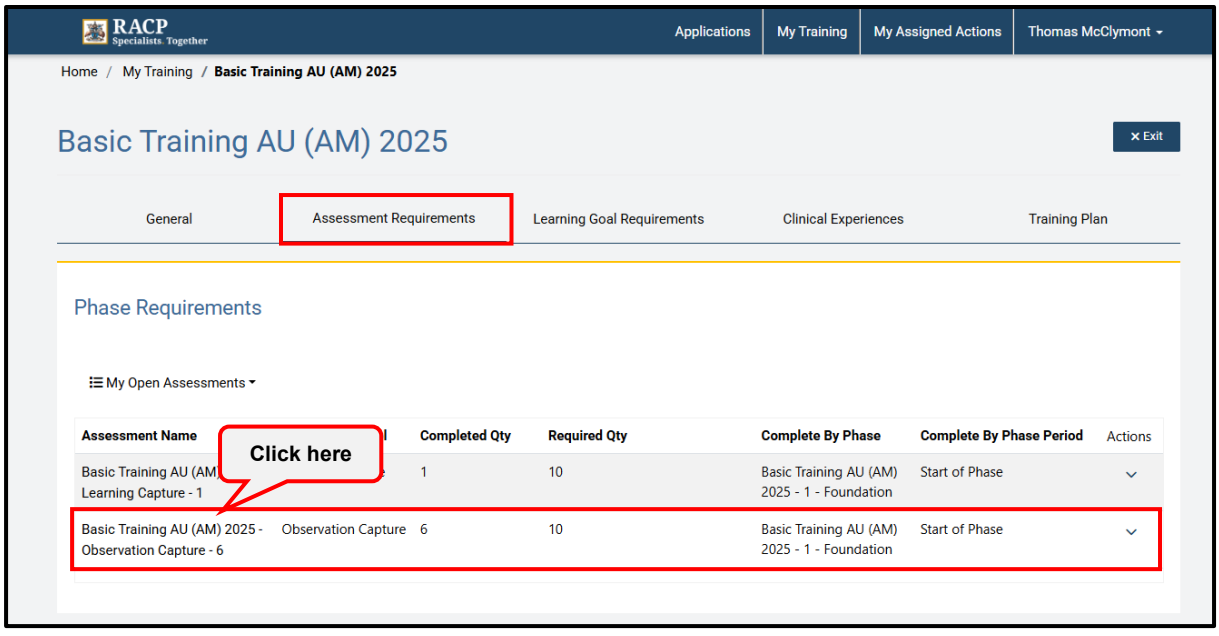

Figure 5330

3. The **Assessment Details** screen will appear, with information regarding your Observation Capture. Scroll down to the Observation Captures section where your current observation captures are listed for this assessment requirement. Refer to **Figure 54.**

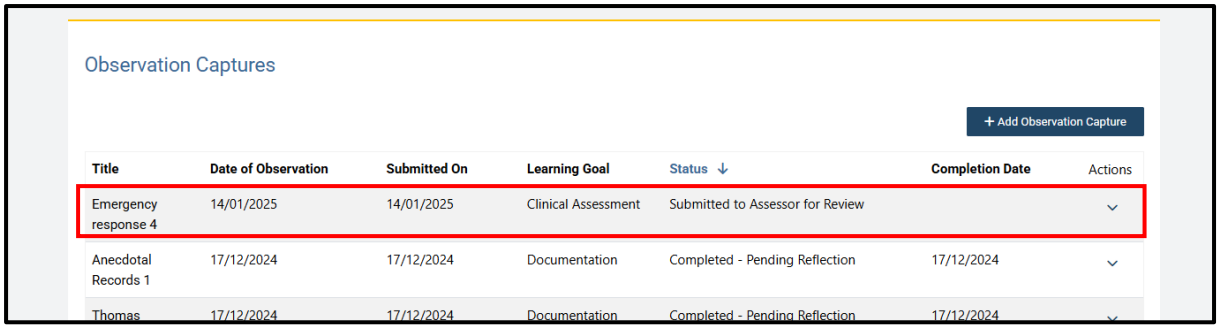

Figure 54

4. Click on the downward facing arrow under **Actions** and select **Cancel.** Refer to **Figure 55.**

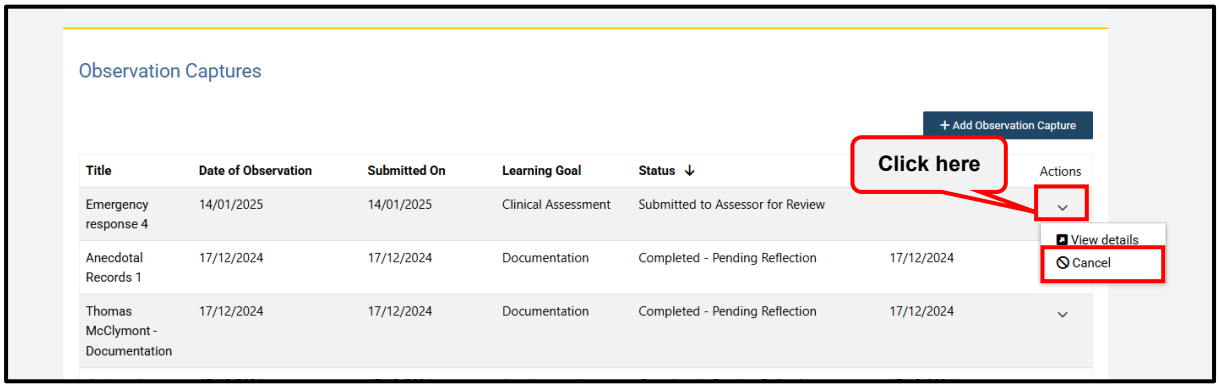

Figure 55

5. The **Confirm Cancellation** pop-up will appear. Click on **Confirm** to cancel or **Exit** to avoid cancelling. Refer to **Figure 56.**

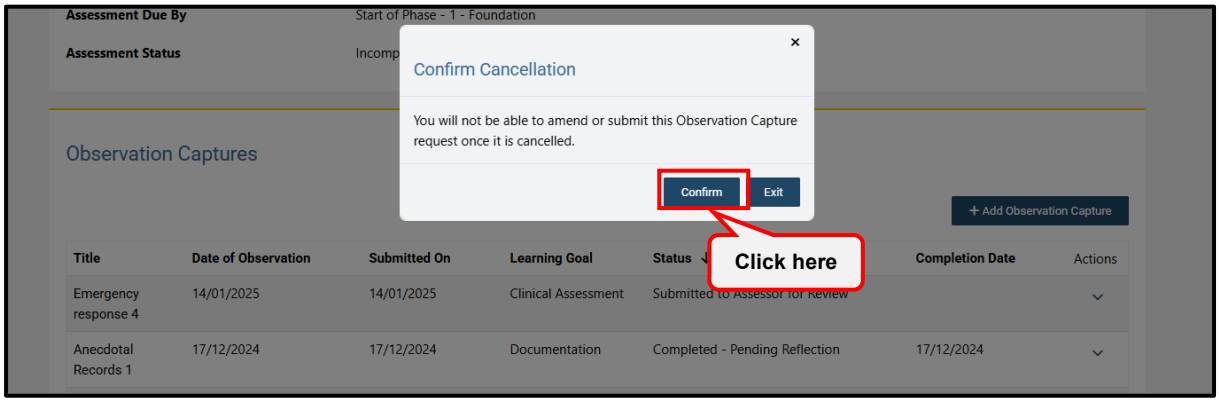

Figure 56

6. If you cancelled the observation capture, the system will show a confirmation on the screen saying **'Observation capture and associated feedback request are now successfully cancelled.'** Refer to **Figure 57.**

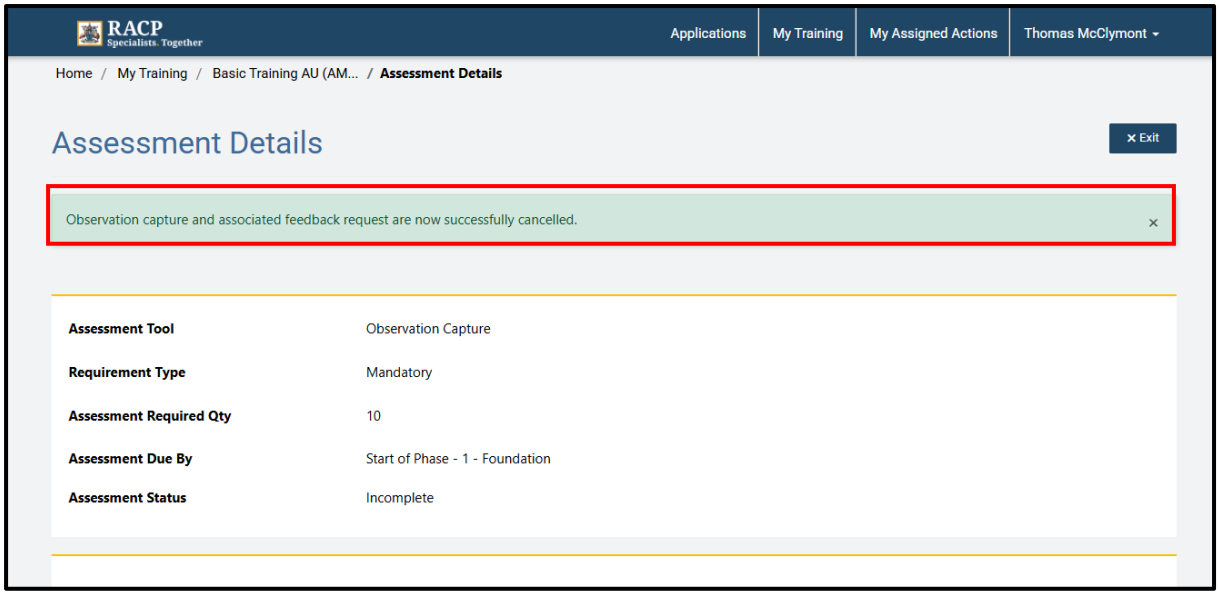

Figure 57

7. You will now observe that the **Observation Capture Status** column will be updated to **Cancelled** and the Feedback Request associated to this capture will also be updated to Cancelled. The cancelled Observation Capture will remain in your list against your training program with the status of cancelled. Refer to **Figure 58.**

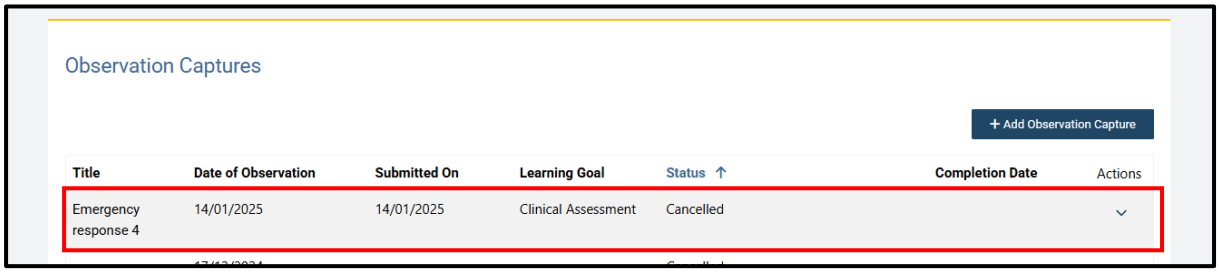

Figure 58

Section 3: Summary of Outcomes

The Learning Teaching & Assessment Tool Guide for Trainees is now complete. You now have instructions to:

- Login to the Training Management Platform (TMP) Portal as a Trainee
- Create an Observation Capture
- Create Feedback Request for an Observation Capture
- Monitor Observation Capture status
- View Submitted Observation Captures
- Submit a reflection for your Observation Captures initiated by your Supervisor
- Cancel Observation Captures