Progress review panels

Progress Review Panel member - TMP guide

Progress Review Panel members will be able to….

Review panel information

- **View details** of all progress review panels they are part of (training program alignment and members)
- **Review trainees assigned** to each panel, including all training records
- **Review trainee progression** against the progression criteria and complete a mid-phase review

Monitor progress / make decisions

- **Make progress decisions or recommendations*** (end of phase – can be done individually or in bulk)
- Monitor trainees **completing rotations under a different panels** (e.g., secondment setting)

Add / review conditions

- **Add training conditions** related to:
  - Compliance - completing outstanding assessments
  - Competence - reaching the appropriate progress standards
- **Review trainee responses** to conditions set

*Secondary panels

Workflow

To prepare for a Progress Review meeting, panel members should review the Progress Review Panel checklist.
This ensures members are ready to contribute to an effective discussion.



Progress Review Panel

- Meet and discuss trainees



TMP

- Review individual trainees for progression review/ decision
- Add bulk progression decisions
- Add/manage/update training conditions
- Include certification notes to staff if a decision requires modifying an included rotation

Outcome

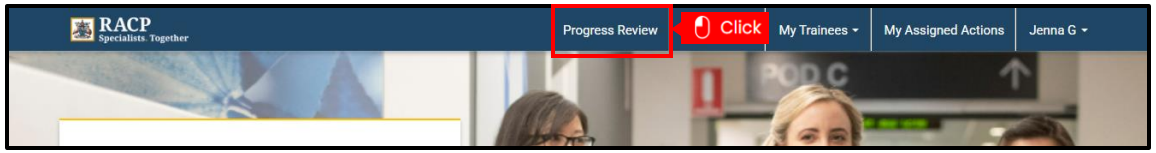
RACP staff will certify and update the outcome in TMP

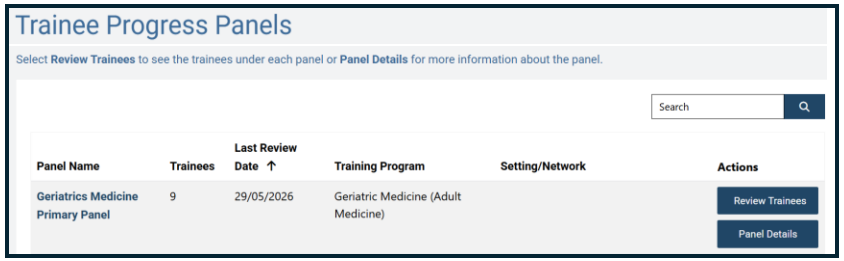
Panel member guide

Review a trainee for a progression review/decision

Navigate to the page

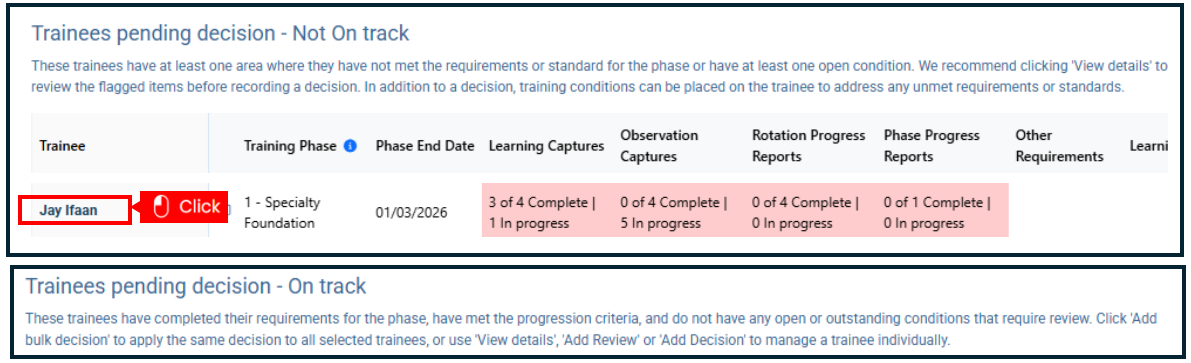
1. Sign in to TMP.
2. Click Progress Review on the top navigation bar.





3. Find the relevant panel name and click Review Trainees or Panel Details.

4. Click Review Trainees.
5. Scroll down to view **Trainees pending decision – Not on track & On track**, as well as **Trainees NOT pending decision.**
6. Click the name of the trainee to open their profile



Review

A trainee will present in the '**Not on track**' list if:

- they have not met the required quantity for all their assessment tools within the due dates for the phase,
- one or more learning goals have been rated less than the expected learning goal rating by the Supervisor(s) in the latest progress report,
- there are outstanding open Training Conditions requiring completion,
- there are progress reports for that phase that have the latest recommendation type of either Closely review this trainee's progress or Refer to the training support pathway.

Information about why the trainee is not on track is in the individual trainee record.

Review individual trainee data

6. Click through to review all data from the training phase or rotation.
   - Rotation Plan in Current Phase
   - Progress Review Reports
   - Phase Requirements
   - Program Level Requirements
   - Learning Courses
   - Assessments Mapped to Learning Goals
   - Learning Goals Rating – Progress Reports
   - Supervisor Learning Goal Rating History
   - Professional/Clinical Experience
   - Professional/Clinical Experience – Time Certified
   - Professional/Clinical Experience – Certification Comments*
   - Training Conditions – Open*
   - Training Conditions – Closed
   - Progress Decisions or Reviews*

*Instructions on how to add these fields are on the following pages.

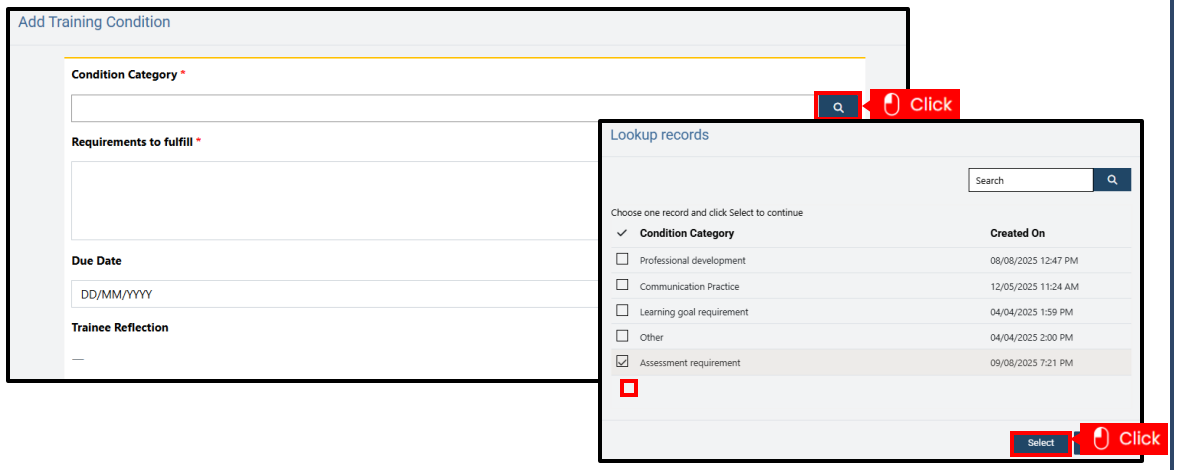
Panel member guide

Add a trainee's training conditions

1. Scroll down to Training Conditions – Open
2. Click Add condition



3. Click the search lookup to select a Condition Category from the list.
   You can only select one category per condition.



4. Type a description of the Training Condition and what the trainee must complete to meet this. A learning goal field will appear if *learning goal requirement* is the selected category.

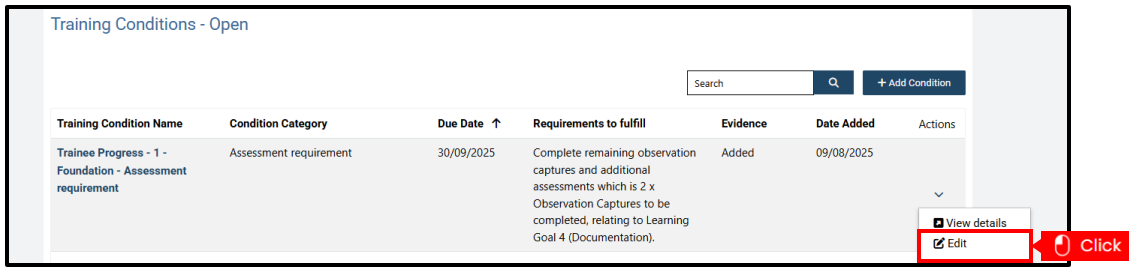
5. Set a due date and click Submit

6. A success message will appear

Review/update a trainee's training condition

Action

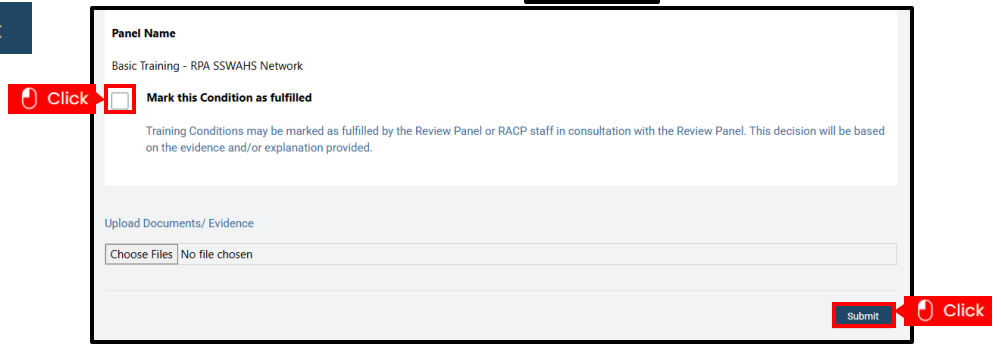
1. Navigate to the trainee's list of open conditions (see Review a trainee for a progression decision instructions)
2. Click the Actions drop-down and select Edit



3. View the trainee reflection
4. Make changes to any section as necessary
5. Click Submit to save changes

Close a trainee's training condition

1. View the Panel Name and check the Mark this Condition as fulfilled
2. Optionally upload documents/evidence by clicking Choose Files
3. Click Submit



4. A success message will appear. All open and closed conditions will be available in the trainee's profile and in the individual trainee data for panel members.

Panel member guide

Review a trainee for a progression review/decision

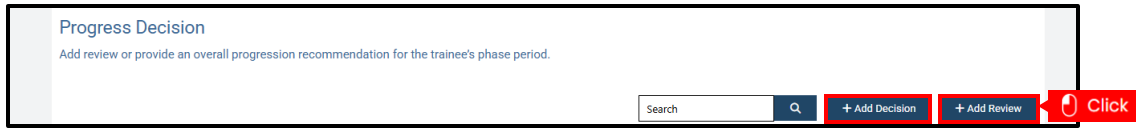
Add Professional/Clinical Certification Comments (optional

1. Scroll down to Professional/Clinical Experience – Certification Comment
2. Click Add Certification Comment
   - *Certification Comments are added for decisions only.*
   - *They publish immediately and are visible to the trainee.*



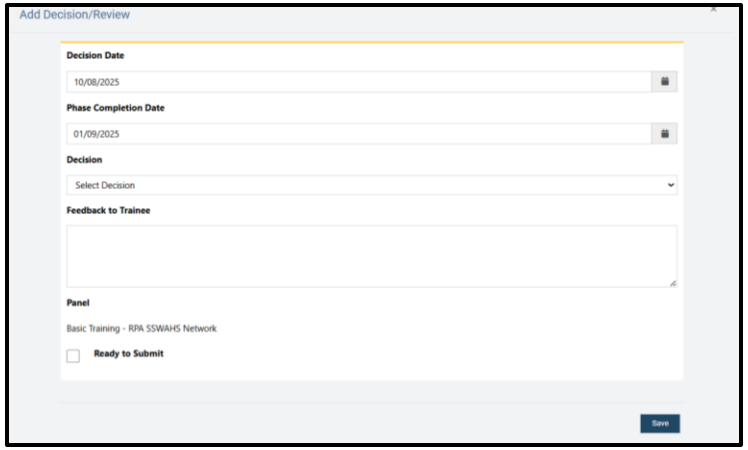
Add Progress Review/Decision

1. Under Progress Decisions, click +Add Decision **or** + Add Review
   - ***Decision*** *= published after RACP staff review & set a publish date*
   - ***Review*** *= publishes immediately*



2. Include:

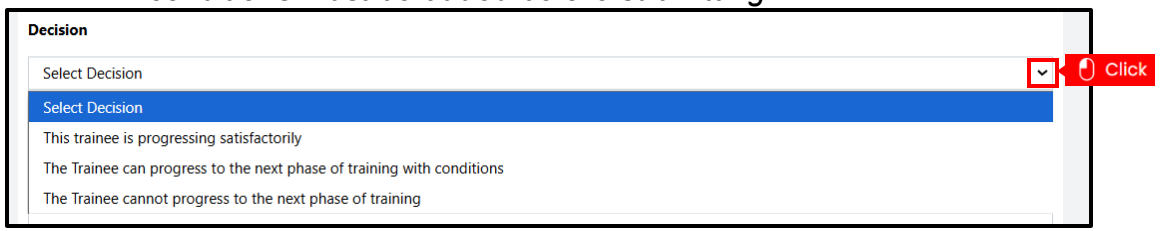
- Decision/Review Date
- Phase Completion Date
- Decision*
- Feedback to Trainee



For details on the Training Support Pathway, watch the on-demand session.

Action

3. In the decision field, click the dropdown to select a decision
   - *If "progress with conditions" or "cannot progress" is selected, conditions must be added before submitting*



4a. Click save to save the decision as a draft Save

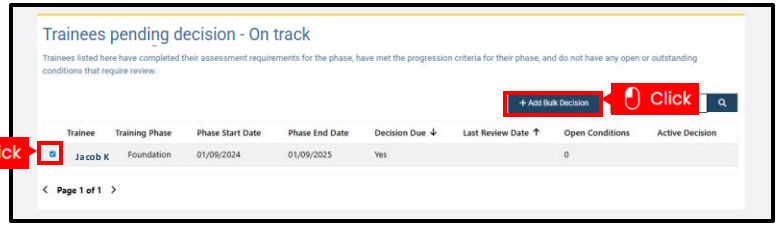
4b. Check Ready to Submit then click Submit
   - decisions are not visible to the trainee until the publish date



Add Bulk Progression Decision - Progress Review Panels can progress trainees in bulk from the on-track list or choose to review and progress them individually.

Navigate to Trainees pending decision - On Track

1. Checkbox trainees to be bulk progressed
2. Click + Add Bulk Decision



3. Include:
   - Decision Date
   - Decision
   - Feedback to Trainee†

4. Click submit

†Optional. The same feedback will be sent to all trainees checked