

# User Guide for Supervisors & Co-Supervisors



## Username and Password

In the ePortfolio, each user is uniquely identified with a username and password. You will receive a welcome email with your username and instructions on how to set your password.

### 1 Log In

Your welcome email includes a link to the the ePortfolio and your login information.

Here's how to log in for the first time

1. Check your email for your login information.
2. Click the link provided in the email: <https://au.kaizenep.com>
3. Select **ANZCA** organization to log in with.
4. The site prompts you to enter your **username** and **password**:



You will be redirected to the **Dashboard** page when clicking the **Login** button.

**Note** that you will need to pre-select the organisation again only if you change the browser or device you are using.

# User Guide for Supervisors & Co-Supervisors



## Dashboard Home

We encourage you to bookmark the ePortfolio on the devices you will use the program on.

## 2 Navigation

At the top of each page is the navigation toolbar.

The screenshot shows the ePortfolio dashboard interface. At the top, there is a navigation toolbar with the following items: Dashboard, Timeline, Documents, FAQs, Reports, and User management. Below the toolbar, the dashboard is divided into several sections: a profile card for Alex Smith, a 'Create a new activity or assessment' form, a 'To do list' with several tasks, and a 'My Endorsees' table. The 'To do list' contains tasks such as 'Procedures Endorsement Program: Direct Observation of Procedural Skills (DOPS) for Sam Davies' and 'Annual Verification'. The 'My Endorsees' table shows a list of endorsee names, start dates, and end dates.

The diagram shows the navigation toolbar with numbered callouts 1 through 6 pointing to specific elements: 1 points to the Dashboard icon, 2 points to the Timeline dropdown, 3 points to the Documents icon, 4 points to the FAQs icon, 5 points to the Reports icon, and 6 points to the User management dropdown. Additionally, there is a bell icon with a red badge showing the number 7, and a user profile icon.

1. Landing page showing an overview of your activities.
2. Record of all activities you entered into your portfolio, all documents and forms you upload.
3. Documents you have uploaded into your portfolio.
4. Collection of standard reports you can view, generate and export.
5. List of your endorsee and access to their portfolio.
6. Tasks awaiting your action. A red badge with a number inside next to the bell icon will indicate the number of invitations awaiting your response. The '+' allows the creation of an event (i.e., initiate a DOPS).

# User Guide for Supervisors & Co-Supervisors



## 3 My Endorsee List

To see the list of endorsees you are assigned to go to the Dashboard. On the left-hand corner, you will see the My Endorsees table

Click on the **View full** report to see the full list. You can then generate, export the reports and download it as PDF.

Endorsee	Start date	End date
Sam Davies	2 Feb, 2022 0:00	17 Dec, 2022 0:00

View full report

Here is how you view your endorsee's profile

- On your **Dashboard**, locate the **Endorsee Profiles** table. Click the **View all users**. Type the name in the search box or select from the list.
- On the navigation menu, select **User management**. Type the name in the search box or select from the list.

The name are hyperlinks. Click on the name link to view the endorsee's profile and a summary of progress (case logged, DOPS, previously endorsed procedures).

# User Guide for Supervisors & Co-Supervisors



## 4 Review of logbook entries

The screenshot shows a web interface for reviewing logbook entries. At the top, it says "Procedures Endorsement Program: Logbook for Sam Davies" with a "Submit" button and a "Save as draft" link. Below this, there are fields for "Date occurred on 10 Jun, 2022", "End date 10 Jun, 2022", and "Description (optional) Frisby case". A section titled "Section filled in by Sam Davies" is shown with a "Show record" link. The main "Logbook Review" section contains three dropdown menus: "Level of supervision", "Degree of difficulty", and "Feedback". At the bottom of this section is an "Attach files" button.



When endorsees record a case you supervised, they will record the details in the ePortfolio. When they submit the information, an email will be sent to you to provide feedback. You can log in via the link in the email or follow the steps below.

1. Log in to your account. This will take you to the Dashboard page.
2. Go to **To Do**. This will list all your outstanding action. Alternatively, you can also access logbook entries via the endorsee's profile > timeline.
3. Locate the **Procedures Endorsement Program: Logbook** for your endorsee and click on it. This will open the logbook detail page.
4. Click the **Fill in** button.
5. Scroll down to the **Logbook Review** section to add your feedback.
6. Click the **Submit** button when your feedback is ready or **Save as Draft** to save and complete it later.

Once you submit your feedback, this record will be displayed under the **Timeline** tab.

# User Guide for Supervisors & Co-Supervisors



## 5 Initiate the Direct Observation of Procedural skills (DOPS)

Dashboard Timeline Documents FAQs Reports User management

You are logged in as **Kezia Stefanuk**

**Profile**

**Alex Smith**

View profile

Previous Information PEP Supervisor Basic Information College ID Number 144643 Expand

**Create a new activity or assessment**

Who would you like to create this for?

Sam

Sam Davies - demo+sdavies@fry-it.com

1. Go to the **Dashboard** page once logged in to your account.
2. Type in the name of the endorsee in the search box in **the Create a new activity or assessment**.
3. Click on the endorsee name from the search list.
4. Click the **Create** button.
5. Click on the Procedures Endorsement Program: Direct Observation of Procedural Skills (DOPS) link.
6. Complete the form.
7. Click the **Submit button** when ready or **Save as Draft** to save and complete it later.

Once you submit the forms, this record will be displayed under the **Timeline** tab.

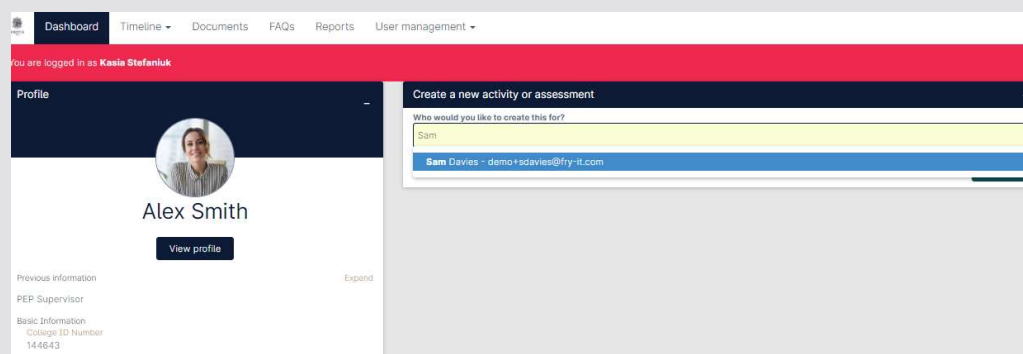
# User Guide for Supervisors & Co-Supervisors



## 6 Confirmation of competence

1. Go to the **Dashboard** page once logged in to your account.
2. Type in the name of the endorsee in the search box in the **Create a new activity or assessment**.
3. Click on the endorsee name from the search list.
4. Click the **Create** button.
5. Click on the Confirmation of competence link.
6. Complete the form.
7. Click the **Submit** button when ready or **Save as Draft** to save and complete it later.

Once you submit the forms, this record will be displayed under the **Timeline** tab.



### Saving & continuing later

Saved drafts are available to action via your timeline, also via the 'To do list' in the top right-hand corner, and via the dashboard.

For assistance with using the ePortfolio please contact [fpm@anzca.edu.au](mailto:fpm@anzca.edu.au)