

JETS – JAG Endoscopy Training System

JETS User Guide - e-Portfolio – Trust Administrator

OVERVIEW

An e-portfolio trust is a collection of JETS users from an organisation that can interact with one another. Each user has their own profile and gains additional functionality by being a trust member.

- trainees can setup an endoscopy session and allocate the training to a trainer associated with the trust.
- trainers can review their trainee's e-portfolios, focus their training and submit DOPS assessments on trust trainees.
- trust leads can set certification levels and see training activity and performance of trainers and procedural performance of trainees.

To support the management of a trust's e-portfolio it is recommended a trust administrator is nominated (this can be done by the trust lead however). The trust administrator is responsible for:

- managing the members of the trust's e-portfolio - searching for and adding new users when they join the trust and removing those who leave.
- setting users' certification levels (with the training lead) – these determine each users role i.e. trainee or trainer and limits the procedure types and DOPS forms that can be recorded.
- producing the procedure certification register - a GRS level C requirement.

All these actions are carried out on the Trust Administration page (Fig 1) and are detailed in the sections below. Only trust administrators and the trust training lead have access to this page.

The National Endoscopy Training Programme

Gloucestershire Hospitals NHS Foundation Trust User Administration

Current Trust Users

Name	Role	Admin	OGD				Flexi Diag	Colon Diag	Polypectomy			ERCP Diag	Actions
			Diag	Dilat	Bleed	PEG			1	2	3		
1. Admin	Trust Admin	y											
1. Lead	Trainer	n	6	6	4	4	5	6	4	4			
3. Trainee	Trainee	n	2				1*	1				1	
4. Trainee	Trainee	n	3	2	2		2	1				1	
5. Trainer	Trainer	n	2	1	2	4	4	4	3	3	3		
Dunckley, Paul	Trainer	n	4				4	4					
Trainee, Paul	Trainee	n	1				1	1				1	
6, Trainer	Not yet accepted	n											

Certification Level Descriptors

Add new user to Trust
Enter User's GMC/NMC # (or email if not an endoscopist):

Endoscopy Units currently associated with Trust
Cheltenham General Hospital
Gloucestershire Royal Hospital

NHS Email Support: JETS_support@endoscopy.nhs.uk JAG Disclaimer ©2010

Fig 1 – Trust Administration page

PROCESS FOR TRUST ROLL OUT OF THE E-PORTFOLIO

The Trust Lead and Administrator will co-ordinate the local roll out of the e-Portfolio at Trust level. Below are listed the steps to achieve this:

- Contact enquiries@thejag.org.uk to setup the trust's e-portfolio and obtain a logon
 - Include in the email the name of your trust and the names of all the hospitals with endoscopy units within the trust. Also include the name, email address and GMC/NMC number of the trust's Lead and Administrator.
- Add the trust's endoscopists on the trust administration page (see below)
 - A GMC/NMC number and email addresses for each user will be required
 - Ensure the training lead is setup and has training lead access
 - For new trainees arriving at a hospital it is sensible to do this in advance of the start of their attachment
- With the Training Lead agree the certification levels for each of the endoscopists
 - The certification levels determine a users role and which procedures trainers can submit DOPS forms for and which procedures types trainees can record
 - New trainees should have their level set to "training"
 - Where levels have not been locally assessed this can be recorded
- Once each endoscopist has accepted the trust invite set their certification levels on the system
 - Users will not be able to utilise the system fully until these are set
 - Only the trust lead or administrator can amend the certification levels

Once these steps have been completed the trainees will be able to add procedures to their e-Portfolios and the trainers will be able to review portfolios and submit DOPS.

THE TRUST ADMINISTRATION PAGE

This is the main user administration page for the system. Only the training lead and trust administrator have access to it. The page:

- Lists all users who are part of the trust's e-portfolio
- Displays each user's role, certification levels and administration access. A user's endoscopic role (trainee, trainer, etc) is determined by their certification levels.
- Clicking on the users name will display the users demographic details including their contact details.
- The actions column has icons to view the user's portfolio (training lead only), amend the user's certification levels, send the user a password reminder and remove the user from the trust.
- At the bottom of the page the individual endoscopy units associated with the trust are listed. If the list is incorrect please contact enquiries@thejag.org.uk.

MANAGING MEMBERS OF THE TRUST

When an e-Portfolio trust is first setup it will need to be populated with the trusts trainees, trainers and a trust training lead (can be >1 if there are different training leads at each unit). This can be done by either:

- asking each user to register on the JETS homepage themselves (see Doc04_JETS User Guide - Registering and Logging On) and then searching for their GMC/NMC # to add them to the trust
- or manually entering each users details yourself; for this you will need each user's name, GMC/NMC # and email address.

The former method will reduce the likelihood of data errors. It is likely that some users will already be registered on the system (due to booking courses) or not all user will register themselves so it is likely both methods will be used.

USERNAMES

- **If a user is a doctor or a registered nurse they must use their GMC/NMC number as their username**
- If the user is a member of a certification body e.g. Health Professions Council they should use their registration id prefixed with the issuing bodies initials e.g. HPC_XXXXX as their username.
- If the user is an administrator with no unique code they should use their email address as their username.
- **If the user has a GMC/NMC is must be used as the username!!!!**

ADDING USERS TO YOUR TRUST'S E-PORTFOLIO

- On the Trust Admin page (Fig 1) enter the user's GMC/NMC # in the text box and click 'Search / Add User'.
- This will search the system for the entered username.
- If the username exists, confirm you have the correct user, select a main site and click 'Add User to Trust'.
- If the username does not exist, check you have entered it correctly (listed in the top box, Fig 2). If not click Trust Admin on the left menu and try again.
- If the username is correct the user does not currently exist in the system. Complete the user's details (verify the email address); use the check boxes at the bottom to indicate if the user is an endoscopist, a trainer and/or a JETS trust administrator or lead and click 'Create User'.
- When the user is added to the trust they will be sent an 'Invite to Join Trust email' listing their logon details and asking them to logon and grant the trust access to their portfolio.
- Until the user grants access to the trust their role is displayed as 'Not yet accepted.'

The screenshot shows a web form titled "User Administration". At the top, it says "No user found. Use this form to create a new user." The form has several input fields: "UserName (GMC/NMC/Email)" with the value "trainee45", "First Name", "Surname", and "Email". Below these is a dropdown menu for "Main Site" with the text "-- Please Select --". There are three checkboxes: "Endoscopist" (checked), "Trainer", and "Admin". Under the "Admin" checkbox, there are three radio buttons: "Not Admin" (selected), "Trust Admin", and "Training Lead". At the bottom left of the form is a blue button labeled "Create User".

Fig 2 – Create New User page

SETTING USER CERTIFICATION LEVEL AND ROLE

All e-Portfolio users have access to the basic personal portfolio. Their role and some of the actions the user can perform and how / where other users see them is determined by their procedure certification levels.

Certification Levels	Role	Access
All procedures below trainer level	Trainee	Basic portfolio with quick list setup buttons
Any procedure provisional or full certification	Independent	Basic portfolio with quick list setup buttons Added to Independent Trainee Performance Monitor table
Any procedure trainer or above	Trainer	Basic portfolio without quick list setup buttons Additional trainer portfolio Can review trainees' portfolios & submit DOPS Added to Training activity table

Trust Administrators and Trust Training Lead receive further access.

- Once access to a user's portfolio has been granted their certification levels need to be set (determined by the training lead).
- The certification level amendment page (Fig 3) is accessed from the Trust Administration page (Fig 1) using the Amend icon () in the Action column.
- Confirm you have the correct user by checking the details at the top.
- A user's procedure certification levels are set using the drop down boxes. Descriptors are available by hovering over the ? at the bottom of the table.
- If the user is new to your trust (unknown competencies) their certification levels should be set to 'Not Locally Assessed' (tick box) until a local assessment is carried out for each procedure.
- Certification levels may already be set for the user if they have move from another trust who are using the e-portfolio.
- Clicking the 'Save Certification' will save any changes made and clicking 'Back to User Admin' will return you to the Trust Administration page without saving the changes.

The screenshot shows the 'User Administration' page with a form titled 'Use the form below to amend their accreditation levels'. The form contains the following fields:

- UserName (GMC/NMC/Email):** jets_test
- Name:** Jets Test
- Email:** kevin.dowler@glos.nhs.uk
- Main Site:** Cheltenham General Hospital
- New Main Site:** -- Please Select --
- Current Trust(s):** Gloucestershire Hospitals NHS Foundation Trust
- Role(s):** Trainee

Below the form, there is a note: 'NB. A new trainee should have levels set to probationary until a local test can be carried out.' This is followed by a table for setting accreditation levels:

		Diag	Accreditation Level (Select checkbox for Probationary)
OGD ?		-- Select --	<input type="checkbox"/>
	Dilat	-- Select --	<input type="checkbox"/>
	Bleed	-- Select --	<input type="checkbox"/>
	PEG	-- Select --	<input type="checkbox"/>
Flexi		-- Select --	<input type="checkbox"/>
Colon		-- Select --	<input type="checkbox"/>
	1	-- Select --	<input type="checkbox"/>
Polypectomy ?	2	-- Select --	<input type="checkbox"/>
	3	-- Select --	<input type="checkbox"/>
ERCP		-- Select --	<input type="checkbox"/>

At the bottom of the form, there are radio buttons for 'Accreditation Level Descriptors':

- Not Admin
- Trust Admin
- Training Lead

There is also a 'Select All' checkbox and two buttons: 'Back to User Admin' and 'Save Accreditation'.

Fig 3 – User Certification level amendment

The page also allows you to add or remove the role of Trust administrator or Trust Training Lead and edit a user's main site. If a user is a non endoscopist administrator no certification levels should be set.

PRODUCING THE PROCEDURE CERTIFICATION REGISTER

One of the functions the e-Portfolio performs is to create a Procedure Certification Register (Fig 4) as required by the GRS Training Domain.

Endoscopy Trainees Accreditation Levels										
Endoscopist	OGD				Flexisig	Colonoscopy				ERCP
	Diagnostic	Dilatation	Bleed Therapy	PEG	Diagnostic	Diagnostic	Polypectomy 1	Polypectomy 2	Polypectomy 3	Diagnostic
Trainee, 4	Training				Training					
Trainee, 3	Training									
Trainee, 2	Full Accred				Provisional Accred	Training	Training			
Trainee, 1	Full Accred	Provisional Accred			Training					

Training	needs direct supervision at all times
Provisional Accreditation	can perform procedure independently with endoscopist accredited for that procedure available in the department
Full Accreditation	fully accredited to perform this procedure but not training others
Trainer	fully accredited to perform this procedure, training others
Trainer + TTT	fully accredited to perform this procedure, training others, and with prior skills training experience (eg attended TTT course)
TTT Trainer	fully accredited to perform this procedure, training others, and with prior skills training experience, and faculty on TTT courses

Fig 4 – Procedure Certification Register

To produce the certification register for trainees (Fig 4) click the 'Print Trainees' buttons at the top of the trust administration page (Fig 1). This will create a printable PDF file which lists all the users in the trust which have a certification level of Training or Provisional Certification.

Clicking 'Print All' will produce a PDF file listing all the users which have a certification level set.

FAQ

TRAINERS

1. A trainer does not appear in the trainer list when a trainee is trying to setup a new list.
 - a. Amend the user's certification levels to assign them as a trainer (if authorised).
2. A trainer does not have a trainer section when they review their portfolio.
 - a. Amend the user's certification levels to assign them as a trainer (if authorised).
3. A trainer is unable to sign off a DOPS form for a particular procedure.
 - a. Amend the user's certification levels to assign them as a trainer for that procedure type (if authorised).

TRAINEES

4. A trainee is trying to set up a new list but no sites are listed in the site drop down box.
 - a. The user is not currently a member of any e-Portfolio trusts or the trust has no sites associated with it.
 - b. Go to the Trust Administration page (Fig 1) to ensure sites are listed at the bottom of the page.
 - c. Ask the user to go to their 'Outstanding Actions' page and accept the trust invite.
 - d. If no invite is present on the Trust Administration page:
 - i. click the users name to bring up their profile
 - ii. make a note of their GMC/NMC# and press the 'Back' button
 - iii. use the red cross in the action column to remove the user from the trust
 - iv. enter their GMC/NMC# in the search box to add them to the trust again, this will send a second invite.
5. A trainee can't record data for a particular procedure type.
 - a. Amend the user's certification levels to set them as training in that procedure type (if authorised).

Any other problems please contact the JAG Office at enquiries@thejag.org.uk.