T-Res Training Guidelines – Account holders Roles & Responsibilities

Background:

In 2020, the CCMG started transitioning CCMG fellows-in-training (FIT) training records (logbooks and ITER/FITER) to an electronic format. The CCMG partnered with Resilience Software to create customized electronic, mobile logbooks and ITER/FITER reflecting the progression of FITs within the CCMG training programs.

The T-Res software functions as a learner-as-scribe platform (self-directed, outcome-based learning). It puts the learner in charge of recording all training experiences, of self-evaluating performance in each required learning objectives and longitudinal competencies, with supervisor input and evaluation in an iterative, collaborative manner. This training experience recording format aims to align with the competency-by-design Royal College of Physicians and Surgeons of Canada initiative.

Within T-Res software:

ITERs and Logbooks are separate platforms within the T-Res software. Trainees are responsible for all logbook and ITER entries. The format of these entries has been standardized to facilitate documentation of completed learning objectives and achieved competencies at each stages of training, following the CCMG training guidelines.

Trainees are responsible for completing ITERs and submitting them to the main supervisors in a timely manner.

Supervisors are responsible for regularly reviewing entries and feedback requests, and to approve ITERs or pass them back to the trainee for revision.

Program directors are responsible for the overseeing creation and use of T-Res accounts to facilitate ensuring training requirements are being met as per CCMG training guidelines, as well as endorsing FITER/ITER.

Once training is completed, a summary of training records (logbooks) can be created and submitted electronically, along with ITER and FITER, to the CCMG Credentialing committee.

CCMG T-Res account holders: Access and Roles & Responsibilities

Program Director (PD) Administrator Access

One per site. The login access can be shared with trusted personnel who would facilitate in fulfilling the PD responsibilities.
PDs will have one login for logbooks and one login for the ITER/FITER platform. Each PD will be in charge of creating multiple accounts/logins per specialties and for multiple supervisors and trainees.

It is recommended that the usernames reflect the platform they are using. For example, johnsmith.log and johnsmith.ITER

Administrator Access:
- Create new accounts
- Make adjustments to accounts (such as adding or removing supervisors)
- Add Sites
- Access both logbooks and ITER/FITER entries

Role and Responsibilities:
- Create new accounts (both supervisor and trainee).
- Make adjustments to accounts as needed (for example, change usernames, adjust the training schedule to account for a change in completion date).
- Pass on training knowledge and training resources to supervisors and trainees as needed.
- Ensure the T-Res platform is being used as intended.

Supervisor Access

Supervisors have access to the ITER platform. Please note that the supervisor will not have direct access to the logbook entries.

The number of Supervisors per site varies and may vary by unit. T-Res allows only one supervisor per unit who will be responsible for the ITER/FITER. One main supervisor will be assigned for each teaching unit and will view and provide feedback/approve/reject the ITER/FITER entries of the trainees. All other individuals involved in supervision for that unit are able to be listed but will not be able to provide any feedback electronically. Additional

feedback from these individuals should be provided to the main responsible supervisor for incorporation into a given ITER/FITER.

Supervisor Access:
- ITER/FITER – every time a trainee fills in an evaluation or changes an evaluation, the Supervisor will receive a notice (can control what notifications they receive)
- Can approve and add notes to evaluations but cannot change the actual evaluation. This must be filled in by the trainee in collaboration with the supervisor. Supervisors are strongly encouraged to provide feedback verbally while completing the evaluation with the trainee
- Email trainees directly regarding any evaluations
- Once an evaluation has been approved by the supervisor, it can no longer be modified by the trainee
- As Supervisors do not have access to logbooks, logbook entries may be downloaded to Excel by the trainee and provided to Supervisors for review

Role and Responsibilities:
- Approve ITER/FITER – it is recommended these be reviewed in concert with the trainee as part of a conversation.
- Pass on training knowledge and training resources to trainees as needed.
- Ensure the T-Res platform is being used properly by trainees.

Trainee Access

Trainees will have one login for logbooks and one login for the ITER/FITER platform. Both can be accessed through a browser or using the mobile app, but they cannot be accessed simultaneously.

Trainees are responsible for accessing the T-Res training materials (see T-Res Material below) to ensure they are able to use the platform correctly and fulfill expectations.

Trainee Access:
- Add/edit logbook entries
- Add/edit ITER/FITER evaluations

Roles and Responsibilities:
- All logbook entries and ITER evaluations are filled in by the trainee. Any entry or selection of entries can be exported to Excel , as required (i.e. for review by the supervisor).

Logbooks:

- Trainees are responsible for keeping logbooks up-to-date and for completing all relevant sections of each logbook entry. The logbooks are not evaluated by the supervisor in T-Res.

- Any entry or selection of entries can be exported to Excel , as required (i.e. for review by the supervisor). Please note that the supervisor will not have direct access to the logbook entries. Trainees are responsible for generating appropriate logbook reports for submission to support credentialing applications as required by the Credentials committee.

ITER:
- Evaluations should be discussed with supervisors either prior to, or while completing the ITER/FITER. Supervisors cannot modify the evaluation, but can send a notice with suggested modifications to the trainee prior to approval. Note: anytime a change is made to evaluations, a notice is sent to the supervisor indicated.

The above Roles and Responsibilities relate specifically to using the T-Res platform and do not replace or override the Training Guidelines of your program.

Training Materials

T-Res site: https://resilience.zendesk.com/hc/en-us/sections/200386696-T-Res-Tutorials-Troubleshooting

Training Videos:
Supervisor Guide: https://youtu.be/6G3zKfb-GjY
Trainee Guide: https://youtu.be/veFve2ehLwo
PD Guide: https://youtu.be/N5PKxqgEOPk

CCMG Website:
https://www.ccmg-ccgm.org/training/t-res-training-resources.html