

## WORKPLACE-BASED ASSESSMENT (WPBA) WORKING GROUP



### KEY ACTIVITIES AND PERFORMANCE MEASURES

The Royal College of Pathologists  
*Pathology: the science behind the cure*

SHORT TERM (UP TO 3 MONTHS)					
DATE/ACTIVITY	ACTION BY: WHOM/DATE		OUTCOME	ACTUAL COMPLETION DATE	
01.03.06	<b>Histopathology</b> To develop scenarios on how CbD and DOPS would fit and how they could be tested. List practical skills for which assessment using DOPS would be appropriate.	PJ, PD, MT	28.06.06	<ul style="list-style-type: none"> <li>Evaluation of Clinical Events</li> <li>Scenarios for use of workplace-based assessment tools.</li> <li>Case-based discussion (CbD) assessment form.</li> <li>Direct observation of procedural skills (DOPS) assessment form and guidance notes.</li> <li>Criteria for assessment.</li> </ul>	28.06.06
	<b>Chemical Pathology</b> Look at practicalities of using DOPS to assess practical skills in the laboratory and an appropriate framework for using CbD.	RA, AJ	28.06.06	<ul style="list-style-type: none"> <li>A list of items for DOPS in chemical pathology.</li> </ul>	28.06.06
	<b>Medical Microbiology &amp; Virology</b> Develop a proforma/system to encourage feedback from juniors and BMSs so as to reinforce an effective way of assessing laboratory skills.	DC, JH	28.06.06	<ul style="list-style-type: none"> <li>Assessment forms on DOPS and CbD.</li> </ul>	28.06.06
	<b>Immunology</b> Continue working on DOPS/portfolio written assessment tool.	DK	28.06.06	<ul style="list-style-type: none"> <li>DOPS form – diagnostic laboratory immunology</li> <li>Guidelines for the use of portfolio document</li> </ul>	28.06.06

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<p>01.03.06 <b>All Specialties</b>                      Look at the website to determine whether the assessor written training for Cbd needs to be modified:  <a href="http://www.hcat.nhs.uk/foundation/forms/Assessor%20Written%20Training%20Cbd.pdf">http://www.hcat.nhs.uk/foundation/forms/Assessor%20Written%20Training%20Cbd.pdf</a>                      Test tools on trainee cohort who will give vigorous feedback.                      Concentrate on developing DOPS and Cbd within subject areas – identifying any good practice where similar tools had been developed, develop a list of procedures suitable for DOPS, and a framework for Cbd if necessary adapting the existing tools from the Royal College of Physicians.</p>	<p>All 28.06.06</p>	<p>Assessment tools, adapted from the RCP produced.</p>	<p>28.06.06</p>

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<p>28.06.06 <b>Histopathology</b> The following were presented: Evaluation of Clinical Events. Scenarios for use of workplace-based assessment tools. Case-based discussion (CbD) assessment form. Direct observation of procedural skills (DOPS) assessment form and guidance notes. Criteria for assessment.</p> <p><u>Amendments for assessment forms</u></p> <ul style="list-style-type: none"> <li>Remove 'year of training' from assessment forms.</li> <li>Identify the stages of training.</li> <li>Add – 'Respect for patient dignity' in the autopsy case.</li> <li>Examples of complexity of cases should be provided for assessors on the guidance forms – low, average, high.</li> <li>Forms to be tested on willing volunteers to determine effectiveness.</li> </ul> <p><b>Chemical Pathology</b></p> <ul style="list-style-type: none"> <li>Assessment forms and guidance notes to be devised for CbD and DOPS.</li> <li>Examples of topics for case-based discussions of clinical events should be provided.</li> </ul>	<p>PJ, PD, MT 22.09.06</p> <hr style="border-top: 1px dashed black;"/> <p>RA, AJ 22.09.06</p>	<p><u>Amendments</u> Done</p> <p>Done</p> <p>Done</p> <p>Some trainees had participated in testing the assessment forms - positive feedback, allocated feedback time should be longer.</p> <p>Forms devised. Awaiting guidance notes.</p> <p>Topics provided.</p>	<p>22.09.06</p> <p>22.09.06</p> <p>22.09.06</p> <p>22.09.06</p> <p>22.09.06</p> <p>22.09.06</p>

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<p>28.06.07 <b>Medical Microbiology &amp; Virology</b></p> <p>From the assessment forms on DOPS and CbD:</p> <ul style="list-style-type: none"> <li>• Delete – GMC number.</li> <li>• Devise clinical events tools similar to histopathology.</li> <li>• Write information sheet for assessors.</li> <li>• Test on own trainees first to determine effectiveness.</li> <li>• Scenarios for DOPS and CbD to be produced.</li> </ul> <p><b>Immunology</b> Diagnostic laboratory assessment form to be tested before the end of year.</p> <p><b>All Specialties</b></p> <ul style="list-style-type: none"> <li>• Test the assessment forms on volunteers and report back to next meeting.</li> <li>• Give examples of complexity of procedures for assessment forms (low, average, high) according to stages of training.</li> </ul>	<p>DC, JH    22.09.06</p> <p>DK        22.09.06</p> <p>All        22.09.06</p>	<p>GMC number now re-added. List of items for ECE produced by Drs Elisabeth Ridgway and Martin Gill.</p> <p>Guidance notes agreed.</p> <p>Scenarios included in overview documents.</p> <p>Assessment form tested.</p> <p>Level of complexity defined and agreed.</p>	<p>25.09.07 25.09.07</p> <p>25.09.07</p> <p>25.09.07</p> <p>25.09.07</p>

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<p>22.09.06</p> <p><b>Histopathology</b></p> <ul style="list-style-type: none"> <li>• A more suitable word/phrase to be substituted for ‘assessor’s job title’, for example, ‘assessor’s position’.</li> </ul> <p><b>Chemical Pathology</b></p> <ul style="list-style-type: none"> <li>• Stages of training to be shown on forms.</li> <li>• In-laboratory aspects to be included on Cbd forms.</li> <li>• Remove GMC number from the forms.</li> <li>• The format of the histopathology assessment forms is to be adapted for chemical pathology – common scenarios, same style and rhythm i.e. setting same parameters.</li> <li>• Carry out testing.</li> </ul> <p><b>Medical Microbiology</b></p> <ul style="list-style-type: none"> <li>• Assessment form to include respect for patient dignity.</li> <li>• Carry out testing/informal pilot and report to the next meeting.</li> </ul> <p><b>Virology</b></p> <ul style="list-style-type: none"> <li>• Remove year of training from the forms</li> <li>• Carry out testing /informal pilot and report to the next meeting.</li> </ul>	<p>PJ, PD, MT      07.12.06</p> <p>RA, AJ      07.12.06</p> <p>JH</p> <p>DC</p>	<p>All forms changed. Forms re-changed to include a range of possible assessors.</p> <p>Done. Done.</p> <p>GMC number re-instated on the forms for the paper-based system. Done.</p> <p>Assessment forms updated.</p> <p>Testing and informal pilot carried out.</p> <p>Year of training removed, replaced with stage of training. Testing and informal pilot carried out.</p>	<p>14.03.07 25.09.07</p> <p>14.06.07 25.09.07</p>

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22.09.06 <b>All Specialties</b> <ul style="list-style-type: none"> <li>• To be discussed at the next meeting – for all specialties: frequency of assessments and how it will work in practice.</li> <li>• All specialties to make the necessary amendments to the assessment forms and forward to Dr Gray and Sandra Dewar by mid-November who will devise a common form in time for next meeting.</li> <li>• CATT representatives to decide on frequency of assessment tools and report at the next meeting.</li> </ul> <b>General</b> <ul style="list-style-type: none"> <li>• Dr Gray to invite Professor Janet Grant to the next meeting.</li> <li>• Dr Gray to check definitions of ‘medical professionalism’ with RCP, identify characteristics and summarise – to bring to the next meeting.</li> <li>• Sandra Dewar to carry out the suggested amendments to the ‘Definition of Assessment Tools’ paper and re-circulate.</li> <li>• The Chair to report at the next meeting re timescales and requirements for submission of assessment programmes following the meeting with PMETB on 27 September.</li> <li>• The draft purpose of the year 1 histopathology MSF and OSPE assessments to be circulated.</li> </ul>	All	07.12.06	All received forms are standardised.	07.12.06
			Draft forms produced.	14.03.07
			Similar number/frequency/stage for all specialties agreed, i.e. minimum 6 assessments per year plus MSF.	25.09.07
	TG	07.12.06	Professor Grant attended and offered advice and external support.	07.12.07
	TG	07.12.06	Agreed to use RCP definition.	25.09.07
	SD	07.12.06	Done. Minor amendments to the generic document were agreed.	07.12.07
	TG	07.12.06	Done. Submission made to PMETB by the deadline of 28 <sup>th</sup> February.	14.03.07
SD	07.12.06	Done. Circulated for information.	14.03.07	

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07.12.06	Dr Gray to investigate costs for a web-based system – HcAT to be approached in the first instance.	TG	14.03.07	Response received from HcAT and a presentation made.	14.03.07
	Training of supervisors - training days to be arranged.	SD		First training event arranged and delivered on 19 October 2007. Additional training days to be arranged.	
	Specialty representatives to consider whether MSF questions should be the same for all years but tailored for the expected level.	CATT Reps	14.03.07	A standardised generic MSF tool would be implemented for year 3 pathology run-through trainees and pathology consultants. The consultation process is in progress.	
	The informal notes from the meeting at PMETB regarding curricula submission to be circulated.	JB		Done	14.03.07

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14.03.07 All to finalise assessment tools and guidance notes by the end of May 2007.	Reps 30.05.07	Tools, guidance notes and supporting documents finalised.	25.09.07
To offset some if not all the costs to trainees, Dr Gray to seek funding from the Department of Health and possibly the European Union.	TG	This has been temporarily parked, but possibly could happen in the long term.	05.12.07
All specialty representatives to decide on number/frequency of workplace-based assessments and forward to Sandra Dewar. (Proforma provided as an example)	CATT Reps 30.05.07	Similar number/frequency/stage for all specialties agreed, i.e. minimum 6 assessments per year plus MSF.	25.09.07
In pursuit of a name change for ePATH-SPRAT, the proposed acronyms 'MPAT' and 'MPATH' were to be checked that they were not in use by others.	TG 14.06.07	The quest for a suitable name change is still ongoing. It was decided to call it MSF in the interim period, but the name ePATH-SPRAT to be linked to year 1 trainees.	05.12.07
Other suggestions to be sought at the trainer event on 10 May 2007.	TG 14.06.07	As above, as no suggestions were forthcoming.	05.12.07
<b>Use of assessment tools</b>			
<u>Histopathology</u> Trainee signature to be included on all the assessment forms.	SD 14.06.07	Assessment forms now include space for trainee signature.	14.06.07
<u>Medical Microbiology</u> The changes to the assessment forms to be sent to Sandra Dewar.	JH 14.06.07	Assessment forms now revised and agreed.	25.09.07

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14.03.07 <u>Chemical Pathology</u> Dr Jones to report on further development following the CATT meeting.	AJ 14.06.07	Done.	
<u>Virology</u> Dr Carrington to provide information and guidance for the assessment forms.	DC 14.06.07	Guidance notes agreed.	25.09.07
<u>General</u> CbD and ECE forms – to state that they should not be patient identifiable.	SD 14.06.07	Done.	14.06.07
<u>Definitions and Purpose of Tools</u> Changes to be made to the text for CbD to encompass all specialties.	SD 14.06.07	Done.	14.06.07
Any final amendments to the ‘Definitions’ to be notified to Sandra Dewar.	All 30.05.07	Paper finalised following additional input from Dr Thomas Giles and histopathology team.	August 2007
Amendment to the purpose of the year 1 assessment to be made.	SD 14.06.07	Done.	14.06.07
Any other final amendments to the ‘Purpose’ to be notified to Sandra Dewar.	All 30.05.07	None received. Paper to be made available on the College website.	14.06.07
Discussion on the formulation of MSF questions for year 1 to take place at CATTs	CATT Reps 14.06.07	The meeting agreed that MSF and its contents for year 1 trainees should be left to the decisions of the year 1 assessment panels.	25.09.07
Specialty representatives to discuss with CATTs – whether generic MSF questions for years 3 and 5 should be devised.	CATT Reps 14.06.07	A standardised generic MSF tool would be implemented for year 3 pathology run-through trainees and pathology consultants. The consultation process is in progress.	

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14.03.07	Further comments and feedback on the WPBA Complaints and Appeals are being sought.	All 30.05.07	Document approved.	25.09.07
	Lead deans are to be asked about the mechanisms for dealing with complaints.	TG 14.06.07	Both lead deans agreed that appeals following workplace-based assessments would be dealt with by the deaneries. Complaints will be dealt with by the College.	25.09.07
	Further comments and feedback on the Compliance for Legislation and Diversity document are being sought.	All 30.05.07	Document approved.	25.09.07

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14.06.07	Guidance notes for virology assessments to be provided	DC 25.09.07	Guidance notes agreed.	25.09.07
	To agree what the outcome for each assessment should be.	All 25.09.07	The outcome for the assessments is 'satisfactory' or 'unsatisfactory'.	25.09.07
	Number/frequency/stage and month for workplace-based assessments to be discussed at the relevant CATTs.	JH/DC 25.09.07	Similar number/frequency/stage for all specialties agreed, i.e. minimum 6 assessments per year plus MSF.	25.09.07
	Assistance to be sought from histopathology administrators via the next Histopathology Operational Board meeting to be held on 28 June 2007.	SD/JB 25.09.07	Assistance sought and provisionally granted. However, in hindsight it was not feasible in light of Snap surveys software licensing for other venues.	28.06.07 25.09.07
	Investigate computer database system being used in Scotland for storing and analysing information from questionnaires and surveys.	PJ 25.09.07	Contact made, discussions took place. Snap survey software purchased and Sandra Dewar received training on the bespoke software.	01.10.07
	'Professionalism' to be defined.	TG/SD 25.09.07	Agreed to use definition as per the working party of the Royal College of Physicians.	25.09.07
	Clarification to be sought from the deaneries regarding responsibilities for complaints and appeals of workplace-based assessments.	TG 25.09.07	Both lead deans agreed that appeals following workplace-based assessments would be dealt with by the deaneries. Complaints will be dealt with by the College.	25.09.07
	'Ensuring compliance for legislation and diversity' document to be finalised.	SD 25.09.07	Document approved.	25.09.07
	Terms of reference for the proposed Assessment Committee to be finalised.	SD 25.09.07	Draft document approved.	25.09.07

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25.09.07 Create a draft assessment form for medical microbiology ECE with the list of items provided by Drs Elisabeth Ridgway and Martin Gill.	SD 05.12.07	Done	05.12.07
Discuss the draft ECE assessment form at the next opportune CATT meeting.	JH		
Dr Gray to discuss further with Sandra Dewar and Stella Macaskill the appointment of an independent group to carry out the evaluation of the assessment tools.	TG/SD/ SM	Sandra Dewar to manage this project. The project brief to be presented to the Assessment Committee at its first meeting.	
Ensure a space for trainee feedback is written in the technical specification for the web-based system of workplace-based assessment.	SD	Done. Technical specification is to be presented to the Assessment Committee.	
<u>Assessment forms and guidance notes</u> The necessary amendments to be carried out. Documents to be uploaded onto the College website.	SD	End of Sept07 Documents made available on College website.	01.10.07
Dr Gray to consider and seek advice from Professor Heard whether deaneries should be privy to trainees' assessments or should trainees primarily give the College permission to release their data to the deaneries.	TG	Advice from Professor Heard is that deaneries will want to know that the assessments are being undertaken and that the required number will be presented to the ARCP panel.	05.12.07
Minor amendments to be made to the WPBA complaints and appeals document.	SD	End of Sept07 Made available on the College website as a supporting document to the portfolio of workplace-based assessment.	01.10.07
Minor amendments to be made to the 'Ensuring compliance for legislation and diversity' document.	SD	End of Sept07 Made available on the College website as a supporting document to the portfolio of workplace-based assessment.	01.10.07

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<p>25.09.07 Minor amendments to be made to the draft terms of reference for the proposed Assessment Committee.</p> <p>Members to provide comments/feedback to Sandra Dewar regarding the 'Standards for assessment tools'.</p> <p>Minor amendments to be made to the text – Workplace-based assessments for flexible trainees.</p> <p>The proposed DOPS autopsy assessment form to be forwarded to the histopathology team.</p> <p>Members to feedback to Dr Gray and Sandra Dewar any comments regarding the review of the current terms of reference.</p> <p>Members to feedback their comments to Sandra Dewar regarding the project brief for a generic multi-source feedback (MSF) tool for all pathology specialties.</p>	<p>SD</p> <p>All 26.09.07</p> <p>SD End of Sept07</p> <p>TG</p> <p>All 30.11.07</p> <p>All 30.11.07</p>	<p>Draft ToR to be presented to the Assessment Committee at its first meeting to be held early 2008.</p> <p>Comments/feedback received. Document amended and made available on the College website as a supporting document to the portfolio of workplace-based assessment.</p> <p>Document made available on the College website.</p> <p>Draft assessment form forwarded and comments received from the histopathology team. Suggestions put forward to Professor Sebastian Lucas.</p> <p>Item included on the agenda for next meeting to be held on 05.12.07</p>	<p></p> <p>01.10.07</p> <p>01.10.07</p> <p>30.10.07</p> <p>12.11.07</p>
<p>05.12.07 All action points to be carried forward to the Assessment Committee. First meeting to be held on 12 March 2008.</p>			

**SIGN OFF**

Signature:



Date: 12 March 2008

Dr Trevor Gray  
Chairperson, Workplace-based Assessment Working Group

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