

Management Portfolio

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Current Format - Objectives

- “Management” issues that a new Emergency Medicine consultant might encounter
- Not expected to know everything
- Sensible and logical approach
- Show they care for patients and staff
- When and who to ask for help

Current format

- Total time -35 mins
- 5 mins to read in tray papers
- 15 mins – short cases (5-6)
- Then long case – 15 mins (1 - 2mins reading time)
- 40 marks in total – need to score a min of 23 to pass

From Aug 2018

- No Viva
- Successfully complete management portfolio as a work place based assessment
- Current ST5's (Started as a ST4 from Aug 2016)

Requirements

- Minimum of four assessments
 - One of four must include working with other specialties
 - Two mandatory
 - Managing a complaint
 - Managing a critical incident

Management - Assignment

- Assignment need to be completed in four weeks
- Each assignment need to have an assignment record
- The record should be uploaded to portfolio and linked to the curriculum item

Sign off – Each Assignment

- After each assignment
 - Trainer goes through portfolio
 - Evidence of the work is checked by going through uploaded files in portfolio
 - Checks timeline of completion
 - Then completes the sign off form
 - Should include evaluation and discussion of the activity documented
 - Should include trainees part in assignment and their learning

Assignment Example – Trg day

- Emails to speakers as an evidence of organisation
- Programme timing or confirmation
- Feedback
- Attendance register
- Thankyou letters for organisation, etc
 - Uploaded to portfolio in your personal folder and link to curriculum items

Trg day – Sign off

- Trainer goes through your evidence
- Discusses about the event, feedback, attendance register, etc
- Trainee learning experience and feedback documented
- Trainer documents - trainees level of engagement or activity in their assignment
- Provides feedback and may sign-off for the particular assignment or may suggest organising another activity

Complaints

- Nature of complaint (eg Complex involving varying staff groups/ specialties or straight forward which only involves medical side of it)
- Not to go into foregone conclusion before collating all the evidence or statements
- Notes checked and speaking to individuals who have been involved or named in the complaint
- Obtaining statements from individuals within set timeline

Complaints - Continued

- Formatting a draft reply
- Appropriate apology or other in your reply
- Actions you have taken to mitigate further complaints of similar nature
- Timeline of your completion of action
- Providing feedback to the person involved in the complaint
- Notifying relevant personnel, eg trainees supervisor, legal services, comms team, etc.

Complaints -Assignment

- Emails to relevant team requesting notes, statements, etc.
- Timeline of events clearly marked
- Action points from complaint and time line for completion
- Notifying relevant personnel
- Reflection in investigating and answering the complaint
- Learning points

Do not include any form of patient identity in your library or reflection. Simple high profile / unusual case can be easily identified.

RCEM - Recommendation

- One assignment per year
- Starting from ST3 level
- Assessed at ARCP regarding compliance
- If not complete then RCEM recommends outcome 5 or an outcome 2 at ARCP
- If not completed one assignment then need to complete two for the following year

Trainee name: _____
 Training number: _____

Domain	Type of project	Details	Date of completion
Human resources/people management	rota management		
	Recruitment including interview appraisal		
Financial	Write a business case		
	Contribute to a cost improvement plan		
Project management	PBR/management of information		
	Introduce a guideline		
Medicolegal	Introduce a new piece of equipment		
	Develop a new service		
Confidentiality and data protection	Handle a complaint	Mandatory	
	Write a report for the coroner or solicitor		
Risk management	Teach trainees about data protection		
	Review a guideline	Mandatory	
Management training	Investigate an incident- root cause analysis		
	Draw up/review the departmental risk register		
	Evidence of attendance and contribution to clinical governance meetings over a period of 6 months		
	Produce/review a procedure to reduce risk to stay results audit		
	Introduction and implementation of induction programme		
	Evidence of attendance at management courses with reflective notes		
	Leadership courses attended with reflective notes		
	Equality and diversity training		
	Other relevant training courses		

ARCP

- At present it is their in your ARCP checklist
- We expect for the current ST3, ST4 and 5's to complete one assignment per year
- ST6 (finishing after Aug 2018) who are planning to do management portfolio instead of viva need to show their four assessments and sign off at final ARCP
- ST6 who are unsuccessful at mgt viva before Aug 2018 need to complete four assessments required by RCEM

What we don't know yet

- Quality control of management portfolio?
- Is there going to be an assessor from RCEM going through your management portfolio at ARCP for final sign off?
- Guidance for trainer in assessment /sign off relevant sections of management portfolio?
- Any more guidance / worked examples of management portfolio from RCEM?

What we know

- No management viva from Aug 2018
- RCEM should soon send how it plans to assess management portfolio
- RCEM guidance document on management portfolio



Suggestions

- Attend root cause analysis and complaints handling training at your local trust
- Go through the structure of complaint management at your local trust before commencing complaint management
- Leadership courses
- Review a guideline and present it
- Recruitment including interview
- Data protection teaching – Eg Information governance



Suggestions

- Create folder named – Management in your personal folder
- Create Subfolders in your management folder for each management topic to attach the proof of your assignment
- Although you need to complete four as a minimum, there is nothing stopping you to do more.
- I would suggest doing more, if you can and would give you more widespread experience

